



FROM INSIGHT TO INFLUENCE



## Business Registrant Survey 2025

Research report

Prepared for General Optical Council (GOC)

Prepared by Impact Health

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# Key findings

## 1 Key findings

Below are the key findings for research which was collected between 3 February 2025 through to 21 March 2025 for businesses registered with the GOC. The findings are based on completes from 192 registered businesses, representing 7% of the overall registered business population. Findings therefore should be considered directional and may not be applicable to the registered business population in its entirety, and they may also be inapplicable to businesses not registered with the GOC. These key findings summarise some of the information from the research, which is explored in more depth in section 3. Comparisons are made to last year's data to explain how, if at all, business experiences and perceptions have changed over time.

### Services provided

- **Sight tests, prescription spectacles, and contact lens services** continue to be offered by almost all business registrants, as in 2024. The proportion of businesses offering **myopia management has increased to 92%**, up from **85%** last year, and similar increases were recorded in the provision of **treatment for minor eye conditions, acute or emergency eye care, and paediatric care both including and excluding myopia control**.
- As in 2024, **independent prescribing** and **glaucoma monitoring** continue to have the most expected growth in provision, with each forecast to be offered by around **two-thirds of businesses** within the next two years. Of these, independent prescribing has realised the most of its growth predicted last year, now being offered by around a third of registered businesses. As in 2024, many services remain limited in adoption, including **laser eye surgery**, which **96%** of registered businesses have no plans to offer, **orthoptics**, and **domiciliary services**.
- As with last year, almost all registered businesses have contracts with NHS England / health boards; however, 1 in 8 registered businesses are unsure if they will be continuing to hold contracts with NHS England or a health board ophthalmic list. **Independent practices remain over twice as likely** as multiples to have had over 70% of their sight tests over the last 12 months funded by the NHS, and around 3 in 4 businesses indicated that they would find it helpful to take a deposit prior to a sight test or eye examination.

### Innovation

- Innovation activity remains high but has declined slightly since last year. In 2025, **65%** of businesses reported introducing a new or significantly improved clinical service in the last three years, compared to **73%** in **2024**. The most common innovation over the last three years was **optical coherence tomography (OCT)**, followed by **myopia management/control** and **dry eye services**.

- Technology use has increased across the board. The most widely used technologies are **fundus cameras, OCT, and PMS/electronic patient records**, and, as was signalled by businesses in the 2024 study, there has been significant growth in **OptoMap** and **artificial intelligence** usage this year.
- Multiples continue to lead in the use of digital tools such as **interactive websites** with features like **online booking, online sales, and LiveChat or virtual assistants**. Independent practices remain more likely to use **PMS systems**, consistent with last year, although the two-fifths of multiples who do not currently use it indicated that they planned to do so over the next two years.
- Drivers of innovation remain mostly unchanged from last year, being largely **patient-centric** – particularly to improve the customer experience – but also driven by **changes in government/NHS commissioning** and facilitated by the **increasing availability of new technology**. As well as the effects of the COVID-19 pandemic sharply decreasing in terms of driving innovation over the last three years, GOC regulations are also significantly less likely to be considered as high-importance drivers.
- Financial constraints remain the most common barriers to innovation, notably the **state of the UK economy** and the **cost of innovation**. The **lack of NHS IT connectivity to ophthalmology** was also frequently cited as a high- or medium-importance barrier, in line with the 2024 findings.

## Development of optical professionals

- A quarter of businesses currently offer placements to optical students, which is consistent with last year. Placement provision also remains **more common among multiples**, being offered by almost half, and **less common among independent practices**, where they are offered by around 1 in 10. Among the registered businesses not currently offering placements, around a quarter plan to do so within the next two years.
- As with last year, the primary perceived benefits to offering placements are future-facing, through **supporting a new generation of optical professionals** and **increasing the pipeline of future employees**, rather than immediate benefits to the workforce at the time of placement.
- The most common major barriers to offering placements are **time constraints** and **a lack of available consulting rooms**, but many registered businesses also report that there are regulatory, financial, and resource-based barriers having at least a minor impact.
- Registered businesses are employing a wide array of strategies to support their registrant employees' continuing professional development (CPD). Around 2 in 5 businesses **provide it free of charge through third-party providers** – increasing to 4 in 5 for businesses with annual turnovers over £1m – while around a third **provide their own free of charge** and a further quarter **provide funding to complete it**. In addition, over a third of registered businesses **provide time off to complete CPD**. Only a fifth indicated that they provide no support for CPD, although this number was higher for smaller businesses, increasing to 2 in 5 for those with annual turnovers under £250k.
- **4 in 5 businesses monitor CPD compliance** in some way. Of these, **reminders through communications** and carrying out **regular checks on progress** are the most common, each performed by over a third of businesses. Sending reminders of CPD requirements was much more common amongst larger businesses, performed by over half of businesses with annual turnovers of over £1m.

- Support mechanisms for staff facing issues such as bullying, harassment, abuse or discrimination are widely employed, with only 1 in 10 not utilising any. Most commonly, these take the forms of **policies** such as guidance for staff impacted and an acceptable behaviour policy, with each adopted by around two-thirds of businesses, although **training** is also commonplace, with training on abusive customers, training on equality, diversity and inclusion (EDI), and training on how to recognise bullying each employed by around half of registered businesses. However, independent practices were **much less likely** to offer all forms of training.

## Perceptions of regulation and compliance

- 3 in 4 registered businesses believe there is a **direct benefit of GOC regulation** to their business, and around 4 in 5 believe **relevant businesses should be regulated by the GOC**. Overwhelmingly, the most common benefits given were **supporting appropriate standards of behaviour and performance by registrant employees, increasing safety for patients, and ensuring operating businesses are fit** to do business, each selected by over half of registered businesses.
- However, perceptions of regulation and compliance costs remain broadly negative this year. Over a half of businesses **disagree that GOC business registration fees are reasonable**, and a similar proportion disagree that **annual compliance costs are reasonable**. As with last year, the ongoing compliance cost most likely to be considered unreasonable are the NHS commissioning requirements.
- Around half of businesses indicated that they would **like to pay their registration fees in instalments** throughout the year. Currently, the majority of businesses are paying for both their optometrists' and their dispensing opticians' individual registration fees, although around a fifth pay it only for optometrists and a tenth only for dispensing opticians.
- Around 2 in 3 registered businesses agree that the **GOC's standards for optical businesses are easy to comply with** and that **they help to ensure the quality of patient care**, and a half agree **they are easy to understand**. These each represent a small increase on last year, although they suggest more could still be done to improve their comprehensibility.

## Business performance and challenges faced

- Overall, **growth trends for most registered businesses remain positive**, with almost half having seen growth in the last 12 months, and a similar figure anticipating further growth in the next year. Although not statistically significant, growth figures are slightly less positive than last year, with a small reduction in the number of businesses growing and a small increase in the amount in decline.
- The biggest challenges faced by registered businesses continue to be **financial**, specifically the **government funding of sight tests / eye examinations, rising costs due to economic conditions, and increasing wage pressures**. The impact of the **cost-of-living crisis on patients** also continues to be considered quite challenging by a majority of businesses.
- Almost half of registered businesses have found recruiting optometrists and dispensing opticians to be at least quite challenging. This was most often due to a **shortage of professionals in the area**, although many also suggested motivational factors play a part, with **employee expectations of the job** and a **preference for locum working** each selected by almost half of registered businesses.

- 4 in 5 registered businesses have **used locums at least occasionally** over the last 12 months, and around 1 in 3 **use them most or all of the time**. Compared to last year, independent practices were less likely to say they have never used locums, with only 1 in 4 indicating this. Half of businesses suggest their locum use is a **positive choice to fit their business model**, slightly more than the 2 in 5 who feel forced to do so due to staffing issues.
- Overall, most businesses remain confident in their own outlook, with over half **expressing optimism** about their future. However, three-quarters agree that there are **“rough times ahead”** for optical businesses more broadly, a view that has not changed since 2024.





# Full report

## 2 Research introduction

The GOC (General Optical Council) is the regulator for optical professions in the UK. Its mission is to protect the public by upholding high standards in the optical professions. The GOC commissioned Impact Health to run a second wave of quantitative research on its approximately 2,900 registered businesses (as of December 2024), building on its [inaugural 2024 Business Registrant Survey research](#) as well as the [2023 Mapping of Optical Businesses](#) to help support objectives outlined in the [Fit for the Future 2020-2025 Strategic Plan](#).

The research covers a range of topics, with aims to:

- build a picture of the size and characteristics of registered businesses;
- help to understand current issues facing business registrants;
- identify levels of innovation and technology adoption across business registrants;
- explore the role of businesses in training the next generation of eye care professionals;
- understand perceptions of regulation; and
- inform policy development linked to regulation of optical businesses.

The information in this report was collected via an online survey which registered businesses were able to complete between 3 February 2025 through to 21 March 2025. The findings are based on completes from 192 registered businesses, representing 7% of the overall registered business population. Findings therefore should be considered directional and may not be applicable to the registered business population in its entirety. As the survey for the following research was sent only to businesses registered with the GOC, findings may also not be applicable to businesses not registered with GOC.

For more information on how the data was collected and analysed for this report, as well as the reporting standards used within it, see the technical appendix in section 4.1.



## 3 Research findings

### 3.1 Business demographics

The following section presents the weighted demographic data collected for all businesses that completed the survey, outlining:

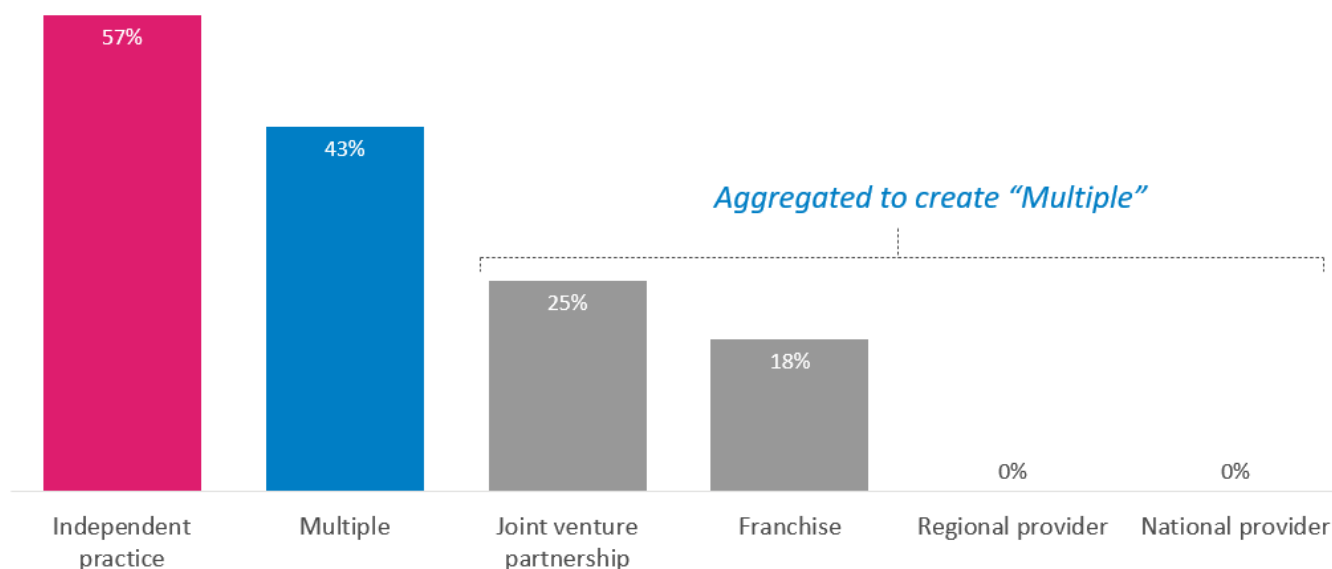
- their business structure, i.e., independent practice or multiple (with multiple comprising joint venture, franchise, regional or national provider);
- which countries within the UK they operate in;
- whether they serve patients in city, town, rural, or other (e.g. mobile) locations;
- how long ago they were established;
- how many staff they employ;
- their approximate annual turnover in the last year;
- the number of practices and sites they operate; and
- their ownership and management structure.

It will also delineate any significant associations that exist between these factors, and whether each one was used as a subgroup to investigate potential differences between business types throughout the report.

#### 3.1.1 Business structure

Data was collected to determine the proportion of surveyed businesses that identify as independent practices, joint ventures, franchises, regional providers, or national providers. The results, illustrated in Figure 1, are based on responses from participating businesses, each of which selected one of these categories.

**Figure 1 – Business structure**



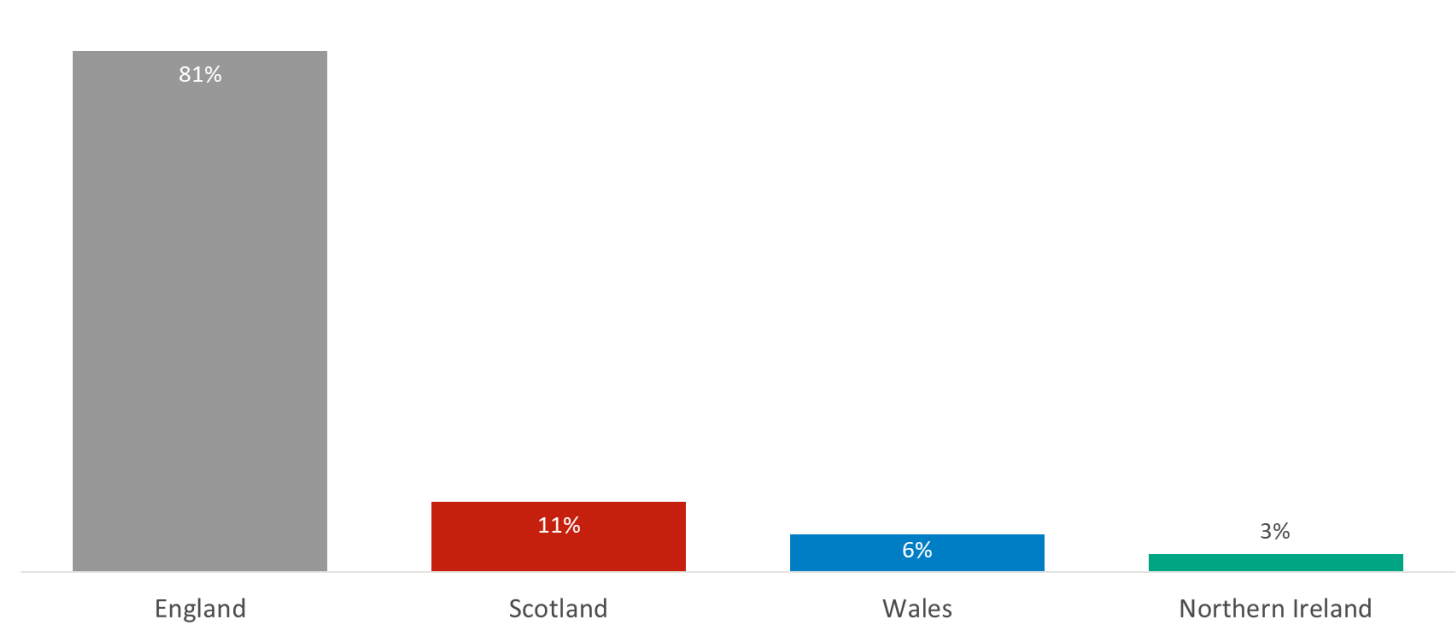
*Which of the following best describes your business structure? (base: all; n=192)*

All data in the report is adjusted using weights based on the proportion of **independent practices** and **multiples** in the GOC database, as outlined in the technical appendix (section 4.1). Of the weighted sample, 57% were **independent practices** and 43% were **multiples**. In keeping with the previous year, the **multiples** group was formed through aggregating data across businesses identifying as **joint ventures**, **franchises**, and **regional/national providers**, in order to provide sufficient base size for statistical analysis.

3.1.2 National breakdown

Figure 2 presents data for which countries within the UK are served by the surveyed businesses.

**Figure 2 – National breakdown**



*Where does your business operate? (please tick all that apply) (base: all; n=192)*

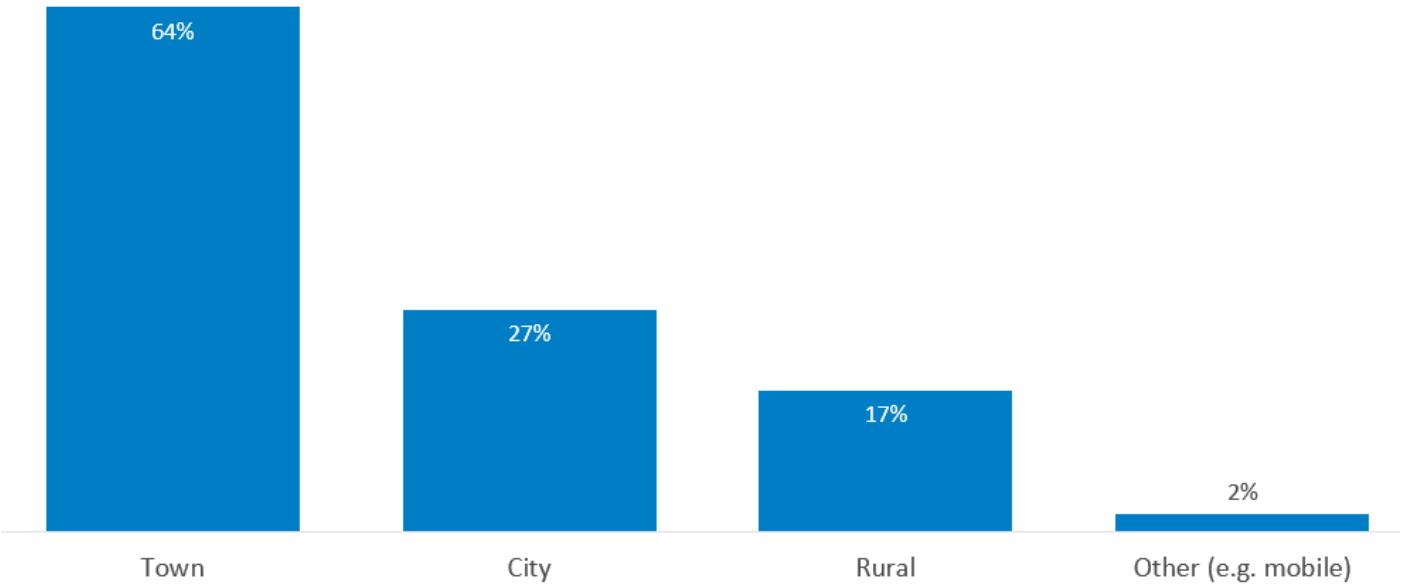
Of businesses surveyed, the majority operated in **England** (81%), with a minority operating in **Wales** (6%), **Scotland** (11%), and **Northern Ireland** (3%). No businesses indicated that they operated outside of the UK. These figures are in line with those from previous research done in the [2023 Mapping of Optical Businesses](#) (England: 80%; Wales: 5%; Scotland: 11%; Northern Ireland: 4%).

Due to insufficient base sizes for nations outside of England, statistical comparisons on this basis have not been made in this report.

3.1.3 Types of location where patients served

Data was collected to understand which businesses served patients in **city**, **town**, **rural** and **other (e.g. mobile)** locations, which figure 3 presents.

**Figure 3 – Types of location where businesses serve patients**



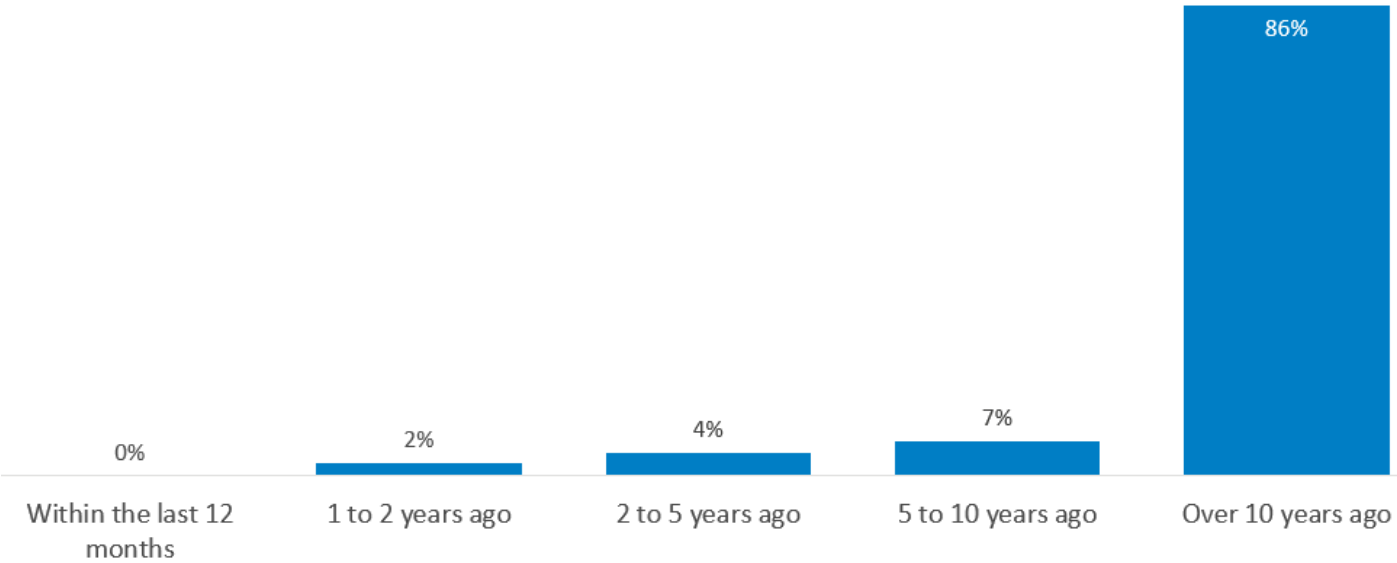
*In which type of locations does your business serve patients? (please tick all that apply) (base: all; n=192)*

The majority of businesses served patients in **town** locations (64%), with around a quarter serving them in **city** (27%) locations and around 1 in 6 serving them in **rural** locations (17%), and each of these groups had sufficient base size to be included in statistical analysis in the report. Although very few selected **other (e.g. mobile)** (2%), this group had sufficiently differentiated responses for some questions to be considered for statistical analysis.

3.1.4 Business age

Figure 4 illustrates the age of businesses surveyed, broken out into those established within the last 12 months, one to two years ago, two to five years ago, five to ten years ago, and over ten years ago.

**Figure 4 – When the businesses were established**



*How long ago was your business established? (please tick all that apply) (base: all; n=192)*

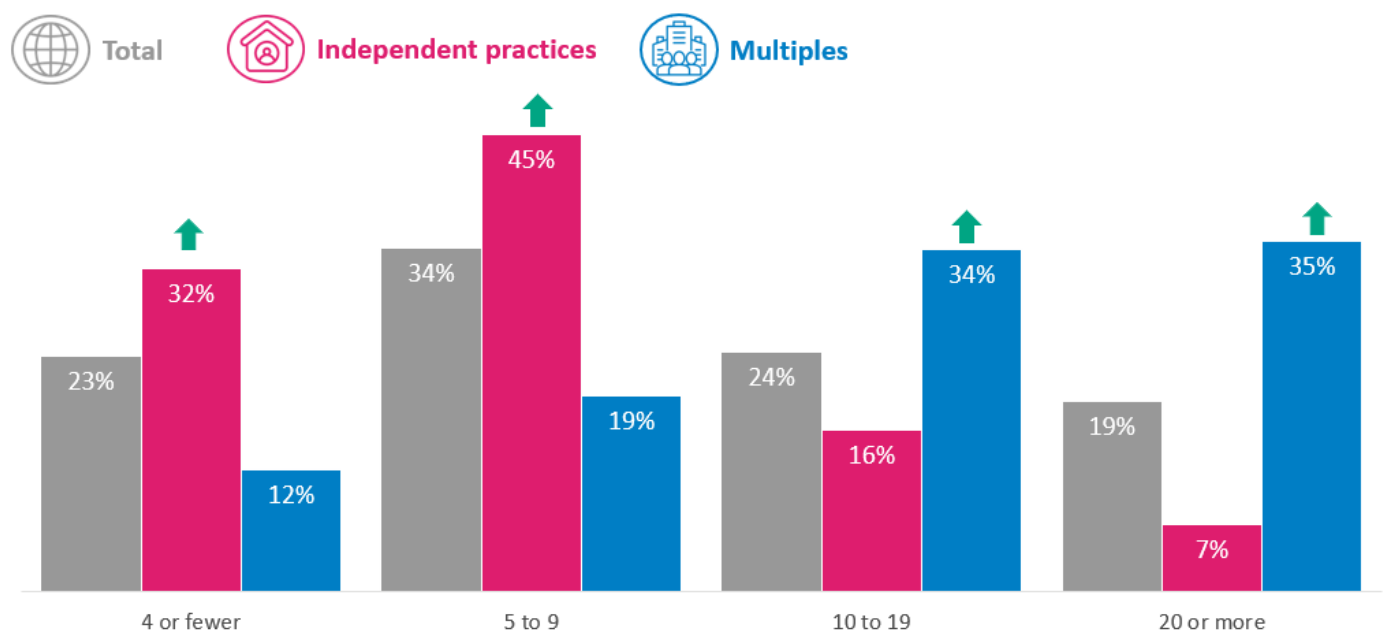
The majority of businesses were established over ten years ago (86%), with a minority being established five to ten years ago (7%), two to five years ago (4%), one to two years ago (2%), or within the last 12 months (0%; n=1). No businesses indicated that they did not know when they were established.

To provide sufficient base size for statistical analysis and to streamline insight, all businesses established within the last ten years were grouped into a category of those established **less than ten years ago** (14%), and significant differences between these and those established **over ten years ago** have been described in this report.

3.1.5 Size of staff and annual turnover

Businesses were also asked to report how many people they currently employ (figure 5) and their estimated annual turnover over the last 12 months (figure 6).

**Figure 5 – Size of staff**

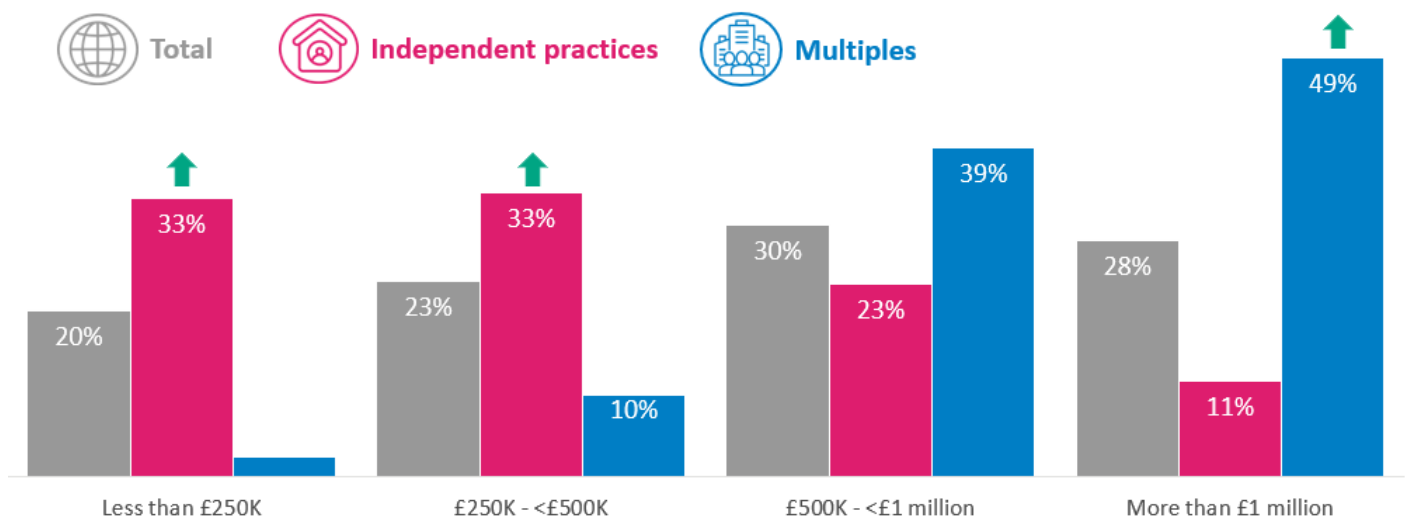


*How many people in total are currently employed in your business? As a reminder, please answer the question based on the business that you own or manage (for example, if you own a franchise, answer in relation to your franchise rather than the parent company). (base: all; n=192; Independent practices base: n=150; multiples base: n=42). Green arrows represent significant increase over other business structures (p<0.05)*

When considering the total, there were slightly more businesses of between **5 to 9** employees (34%), and a roughly even split between those with **4 or fewer** (23%), **10-19** (24%) and **20 or more** (19%) staff.

Staff size was also significantly associated with business structure. **Independent practices** were significantly more likely to have 9 or fewer staff (77%), whereas **multiples** were more likely to have 10 or more (69%).

**Figure 6 – Annual turnover over the last 12 months**



*Please indicate below the approximate turnover of your business in the most recent completed financial year. All figures below indicate yearly turnover in £. Note: Turnover refers to the market sales of goods and services, including all taxes except VAT. (base: all; n=192; Independent practices base: n=150; multiples base: n=42). Green arrows represent significant increase over other business structures (p<0.05)*

There was a roughly even total split between those with an annual turnover in last 12 months **less than £250k** (20%), **£250k to <£500k** (23%), **£500k to <£1m** (30%), and **over £1m** (28%). As with staff size, annual turnover was associated with business structure, with **independent practices** being significantly more likely to have an annual turnover of less than £500k (66%), and **multiples** being more likely to have a turnover of **over £500k** (88%).

### 3.1.6 Number of practices and sites

Businesses were asked to indicate how many practices or sites they currently operate, which was grouped into those who operate one site (78%) and those who operate multiple sites (22%). Number of sites was not found to statistically influence any other questions asked in the survey, meaning no significant differences have been reported.

### 3.1.7 Ownership and management structure

Data was collected to understand the ownership and management structure of businesses surveyed, separated into those who are:

- owned and managed by GOC registered practitioner(s) (87%);
- owned by GOC registered practitioner(s) but managed by “lay” employees (10%);
- owned by lay individual(s) but managed by GOC registered practitioner(s) (1%); and
- those owned and managed by “lay” individual(s) (2%).

Due to insufficient base size in all groups except for those owned and managed by GOC registered practitioner(s), no significant differences have been explored based on this question.

## 3.2 Service provision, innovation and technology adoption

The following section covers a range of questions that were asked to registered businesses to understand which services are being provided, how they are funded, where innovation is happening, as well as what is driving innovation and what is constraining it. The section will accordingly be split into the following subsections:

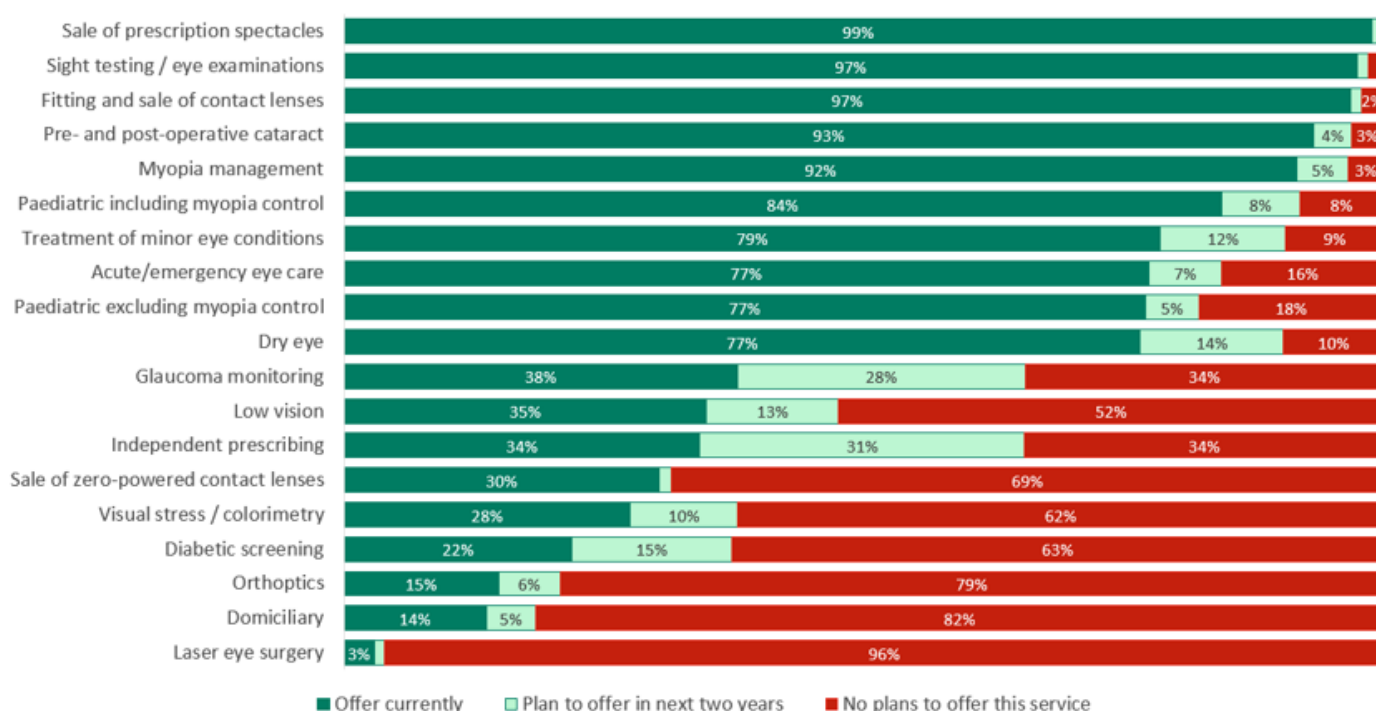
- **Services provided:** what is currently offered by businesses and what they plan to offer within the next two years
- **NHS funding of services:** how many registered businesses currently hold contracts with the NHS or are on the health board ophthalmic lists in Wales, Scotland and Northern Ireland, and whether they intend on continuing to do so; what proportion of sight tests / eye examinations offered by businesses in the last 12 months have been funded by the NHS; and understanding whether it would be helpful for registered businesses to take a deposit prior to a sight test or eye examination
- **Innovation in clinical services:** how many businesses have introduced a new or significantly improved clinical service to patients over the last three years, what the innovations were and whether they have been new to the market or just to the business, and what benefits have been seen as a result of these innovations
- **Drivers of innovation:** which factors have driven innovation for those businesses that have introduced a new or significantly improved clinical service to patients over the last three years
- **Barriers to innovation:** which factors have constrained innovation activities for all businesses over the last three years
- **Innovation in technology:** the current use of websites, including how many businesses publish the prices of sight tests / eye examinations on them, as well as the current and predicted use for a range of digital and diagnostic technologies

### 3.2.1 Services provided

To understand the level of service provision across the industry, all registered businesses were asked to confirm which services they offer. Figure 7 shows the services businesses currently offer, plan to offer in the next two years, or have no plans to offer.



**Figure 7 – Services currently offered or planning to be offered by businesses**



*Which of the following services does your business currently provide, or plan to offer in the future? (base: all; n=192)*

The extent to which each service is offered varies considerably. Currently, the sale of prescription spectacles (99%), the provision of sight tests / eye examinations (97%), the fitting and sale of contact lenses (97%), pre- and post-operative cataract services (93%), and myopia management services (92%) are widely prevalent across registered businesses.

There has been a noticeable increase in the provision of some services compared to last year. Notably, these include myopia management (92% vs 85% last year), paediatric including myopia control (84% vs 73%), treatment of minor eye conditions (79% vs 65%), acute/emergency eye care (77% vs 67%), paediatric excluding myopia control (77% vs 68%), and independent prescribing (34% vs 20%).

As with the last year, glaucoma monitoring and independent prescribing are expected to see the largest increases in provision, with each forecast to be offered by around two-thirds of businesses within the next two years. Conversely, there are several services which over half of registered businesses have no plans to adopt. The services which most businesses are not planning to offer, which all continue from the previous year, are laser eye surgery (96%), domiciliary services (82%), orthoptics (79%), the sale of zero-powered contact lenses (69%), diabetic screening (63%), and visual stress / colorimetry tests (62%).

When considering which services businesses have no plans to offer in the next two years, there were several significant subgroup differences between businesses. **Multiples** were significantly more likely to have no plans to offer visual stress / colorimetry services (81%) compared to **independent practices** (48%). Businesses located in **England** were also significantly more likely to have no plans to offer independent prescribing (41%) than other regions, and those with **annual turnovers under £250k** were significantly more likely to have no plans to offer domiciliary services (61%).

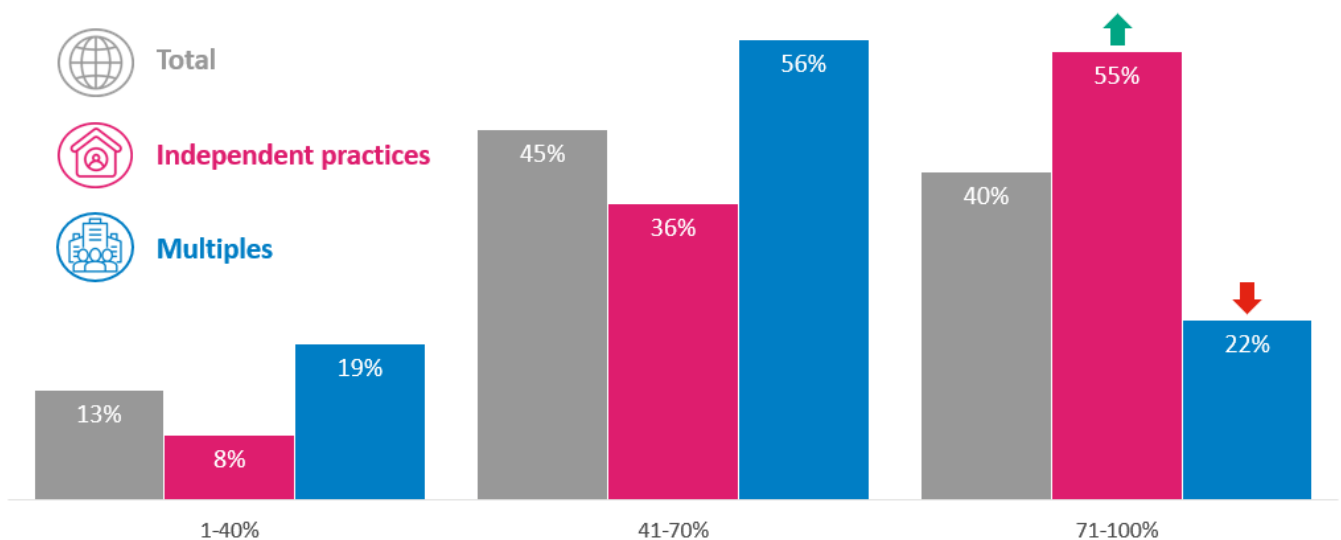
### 3.2.2 NHS funding of services

The vast majority of business registrants surveyed either hold contracts with NHS England or are on a health board ophthalmic list in Wales, Scotland and Northern Ireland (97%). These figures matched the previous year and there were no significant differences between subgroups.

New this year, businesses were asked if they intended on continuing to hold contracts with NHS England or a health board ophthalmic list. The majority of businesses indicated that they intended on doing so (85%), with 1 in 8 being unsure (12%) and a few indicating they did not intend on doing so (3%). There were no significant differences between subgroups on this metric.

Figure 8 shows what proportion of sight tests / eye examinations carried out by businesses over the last 12 months were NHS-funded, broken out into **total sample**, **independent practices**, and **multiples**.

**Figure 8 – Proportion of sight tests / eye examinations carried out by businesses over the last 12 months that were NHS-funded**



*Thinking about the last 12 months, approximately what percentage of sight tests / eye examinations carried out by your business were NHS-funded? (base: n=185; Independent practices base: n=143; multiples base: n=42). Green arrow represents significant increase over figure with red arrow (p<0.05)*

Proportion of NHS funding of sight tests / eye examinations carried out by businesses over the last 12 months was categorised into low (1-40%), medium (41-70%), and high (71-100%). When considering the total sample, there was a roughly even split between the number of businesses that had high levels of NHS-funded sight tests / eye examinations (40%) and medium levels (45%), with only a minority having low levels over the last 12 months (13%). **Independent practices** were more likely to have a greater proportion of their sight tests / eye examinations funded by the NHS over the last year, being significantly more likely to have high levels (55%) when compared to **multiples** (22%). These findings mirror those from the previous year.

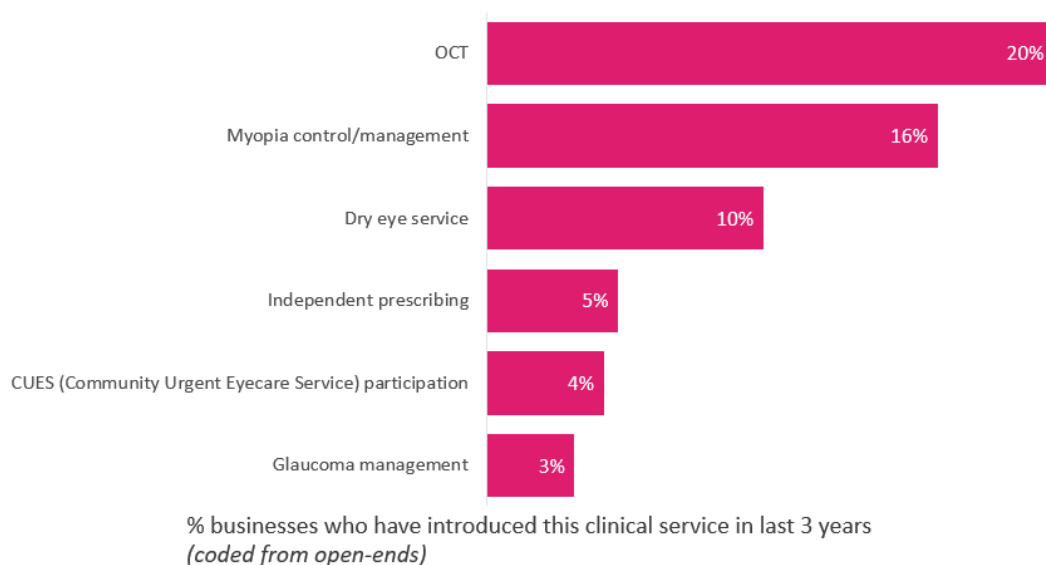
This year, businesses were also asked if it would be helpful to take a deposit prior to a sight test or eye examination. The majority of businesses indicated it would be (74%), with a minority indicating it would

not be (15%) or that they were unsure (11%). There were no significant differences between independents and multiples.

### 3.2.3 Innovation in clinical services

Over the last three years, the majority (65%) of businesses have introduced a new or significantly improved clinical service to patients, which represents a small reduction from the results of the previous year (73%). New to this year, those who had introduced a new or significantly improved clinical service in the last three years were asked to specify what the service was, the results for which are found in figure 9.

**Figure 9 – New or significantly improved clinical services introduced in the last three years**

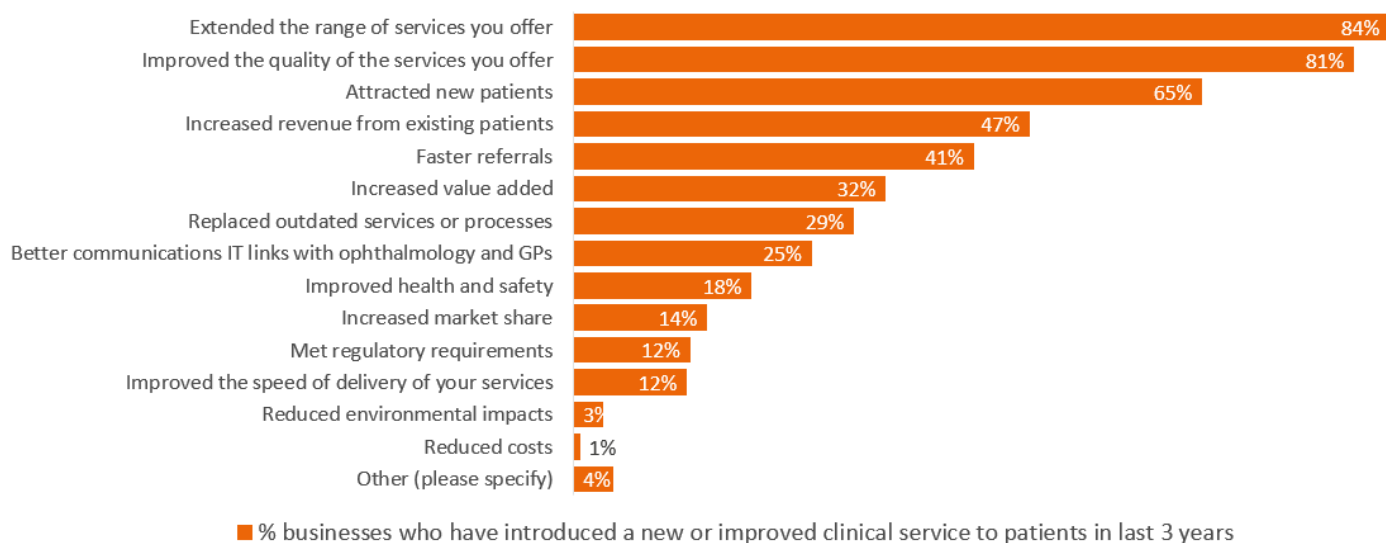


**Over the last three years, have you introduced any new or significantly improved clinical services to patients?** (coded from 'Yes (please specify)'; base: businesses that have introduced a new or significantly improved clinical service to patients in the last 3 years, n=124).

Over the last three years, optical coherence tomography (OCT) has been the most commonly introduced clinical service, having been introduced by a fifth of surveyed registered businesses (20%). Myopia control/management services have been introduced by comparable numbers (16%), while dry eye services have been introduced by 1 in 10 registered businesses (10%).

Of those that have introduced a new or significantly improved clinical service in the last three years, the majority (83%) had introduced a service that was new only to their business, whereas around a quarter (23%) had introduced a service that was new to the market – showing slightly decreased levels of new-to-the-market innovation from the last year (28%). Figure 10 outlines the benefits reported by businesses as a result of their new service development activities.

**Figure 10 – Benefits seen by businesses who have introduced a new or significantly improved clinical service in the last 3 years**



**What have been the benefits of this new service development activity? (please tick as many that apply)**  
 (base: businesses that have introduced a new or significantly improved clinical service to patients in the last 3 years, n=124)

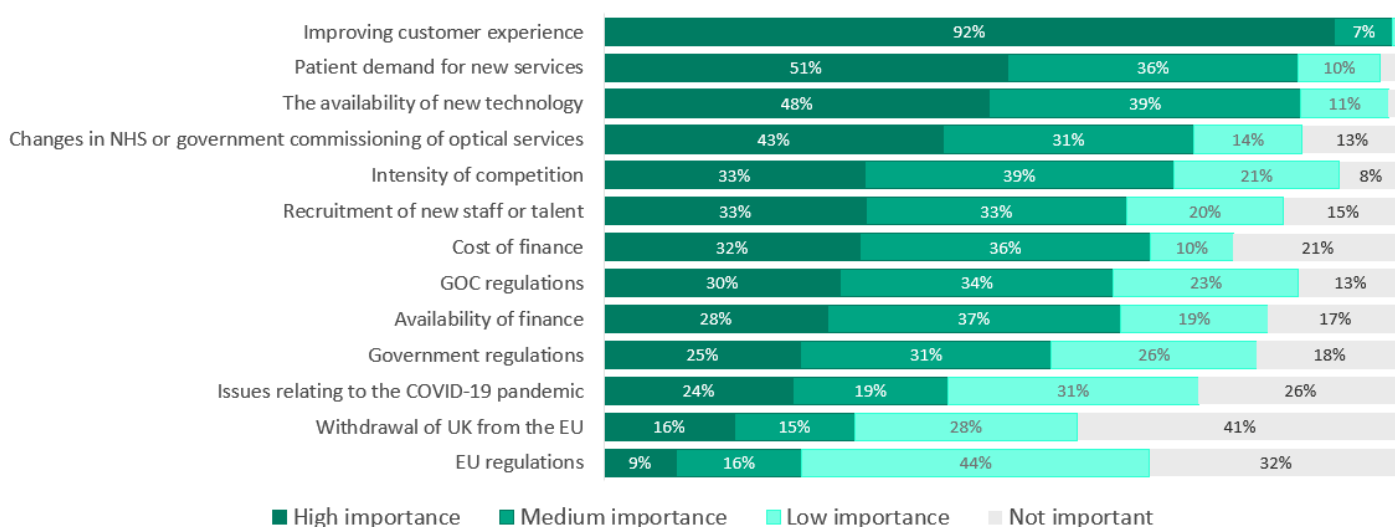
Beyond improving the range and quality of services offered, most businesses who have introduced new clinical services have seen increased business activity as a result, both from attracting new patients (65%) as well as from increased revenue from existing patients (47%). Several have also reported efficiency benefits, including faster referrals (41%), better communications IT links with ophthalmology and GPs (25%) and improved speed of delivery of services (12%).

Of the 4% that selected other, when asked to specify there were singular mentions of generally improved vision care and improved awareness of the service for patients.

### 3.2.4 Drivers of innovation

Businesses who have introduced a new or improved clinical service in the last three years were asked to outline how important a range of factors were in their decision to innovate, which is outlined in figure 12.

**Figure 12 – Driving factors in businesses' decisions to innovate over the last three years**



*Again, thinking about the last three years, how important were each of the following factors in your decision to innovate? (base: those who have introduced a new or significantly improved clinical services to patients in the last 3 years, n=124)*

Drivers of innovation over the last three years have been strongly customer- or patient-centric, with almost all businesses that have innovated reporting improving the customer experience as either high or medium importance (99%), and many reporting this for patient demand for new services (87%). This has been facilitated by the availability of the new technology, which most (87%) ranked as a factor of high or medium importance, mirroring the previous year.

In terms of administrative factors that have driven innovation, most have been driven by regulation on the national level, with the majority ranking changes in NHS or government commissioning (74%) or GOC regulations (64%) as high or medium importance. Conversely, international factors have been comparatively less influential, with approximately a third of businesses reporting UK's withdrawal from the EU (31%) and a quarter reporting EU regulation (25%) in this way. These figures are also in line with the previous year.

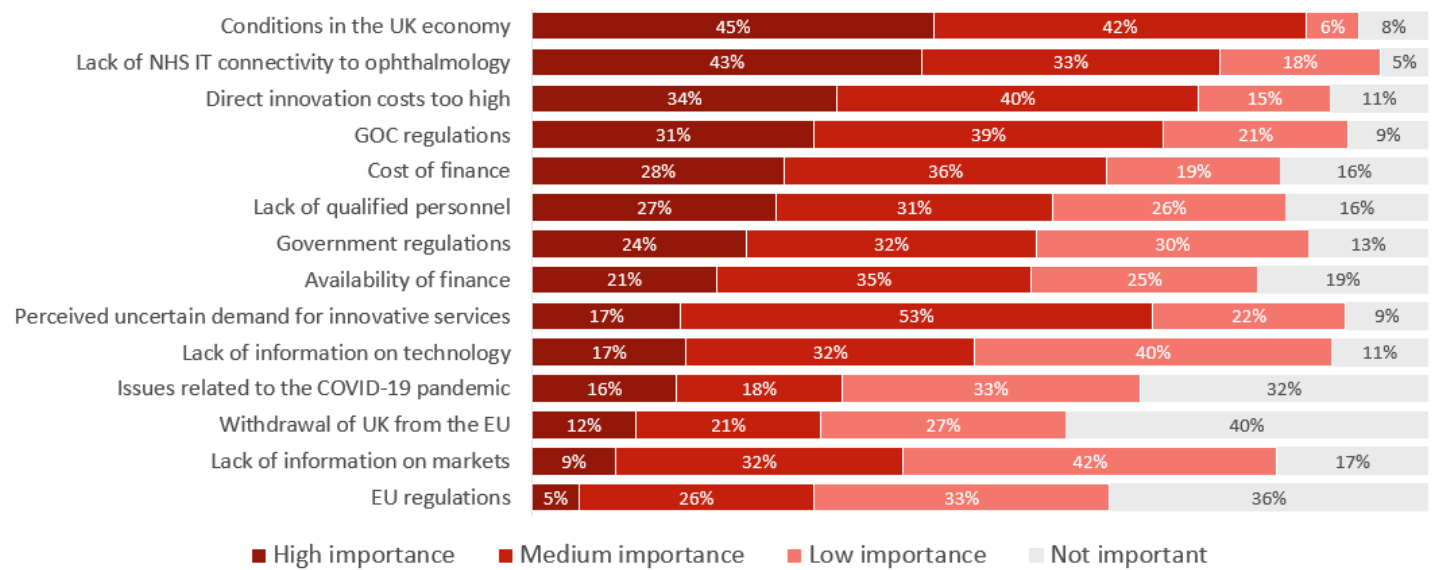
This year has seen some factors decrease in importance in terms of decisions to innovate in the last three years. Predictably, issues relating to the COVID-19 pandemic have decreased in terms of being high importance (24% vs 41% last year), while GOC regulations are also less likely to be deemed high importance (30% vs 45%).

7% of businesses that have innovated also reported other factors that have been highly important in their decisions to do so. When asked to specify, notable mentions included the NHS sight tests or eye examination fees being too low (n=3), a reputational or professional desire to offer the best service (n=3), the rise of unregulated online selling (n=2), and the VAT de minimis payments not keeping up with inflation (n=1).

### 3.2.5 Barriers to innovation

All businesses were asked to rate potential barriers in terms of how much they have constrained new service activity over the last three years, as outlined in figure 13.

**Figure 13 – Barriers constraining innovation activities over the last three years**



*Below is a list of possible barriers that may have constrained your new service development over the last three years. How important were the following factors in constraining innovation activities? (base: all, n=192)*

As shown in figure 13, financial factors have constrained innovation for many businesses, with the majority reporting conditions in the UK economy (86%), the direct cost of innovation (74%) and the cost of finance (64%) as barriers of high or medium importance. Of these, the first two represent small, albeit non-significant, increases from the figures of the previous year (conditions in the UK economy: 74%; direct cost of innovation: 69%). Outside of financial factors, the other key barrier to innovation has been the lack of NHS IT connectivity to ophthalmology, which around three-quarters of registered businesses considered to be of medium or high importance (77%).

Regulation has been another barrier to innovation across businesses, with the majority reporting GOC regulations (70%) and government regulations (56%) as medium or high importance barriers. Similarly to the drivers of innovation, international factors have been comparatively less influential, with a minority finding the UK's withdrawal from the EU (32%) or existing EU regulations (31%) to be barriers of medium or high importance.

10% of businesses also suggested other barriers were highly important in constraining innovation. Of these, there were multiple mentions of General Ophthalmic Services (GOS) fees or NHS funding being too low (n=5), regulatory problems such as lack of integrated care board (ICB) / commissioning engagement and changes to regulation (n=4), online contact lens sales and sales from unregistered sellers (n=3), time constraints and HR demands (n=2), and disagreement about who delivers specific services between the Association of Optometrists (AOP) and Association of British Dispensing Opticians (ABDO) (n=1).

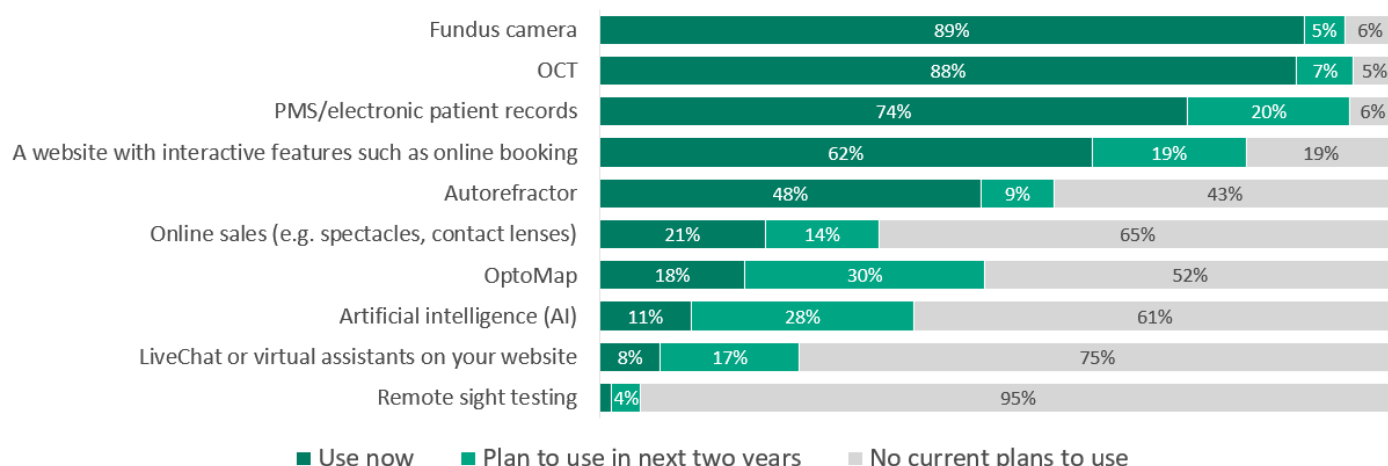
### 3.2.6 Innovation in technology

Businesses surveyed were asked a number of questions to understand their levels of adoption of different types of technology, including websites, social media, and optical services.

The majority of businesses reported having a website (88%). Of the businesses that do have a website, around half (49%) reported publishing the price of a sight test / eye examination on it, with this number being significantly lower amongst **independent practices** (38%) than **multiples** (65%), continuing the trend of last year (independent practices: 35%; multiples: 57%).

Figure 14 below shows a breakdown of other types of technology that businesses either currently use or plan to use in the next two years.

**Figure 14 – Types of technology that businesses currently use, plan to use, or have no current plans to use over the next two years**



*Does your business use, or plan to use in the next two years, the following types of technology? (base: all, n=192)*

Fundus cameras (89%), optical coherence tomography (OCT) (88%), PMS/electronic patient records (74%), and websites with interactive features (62%) have the widest levels of adoption, with most businesses currently using them. Additionally, almost half of businesses are also using autorefractors (48%).

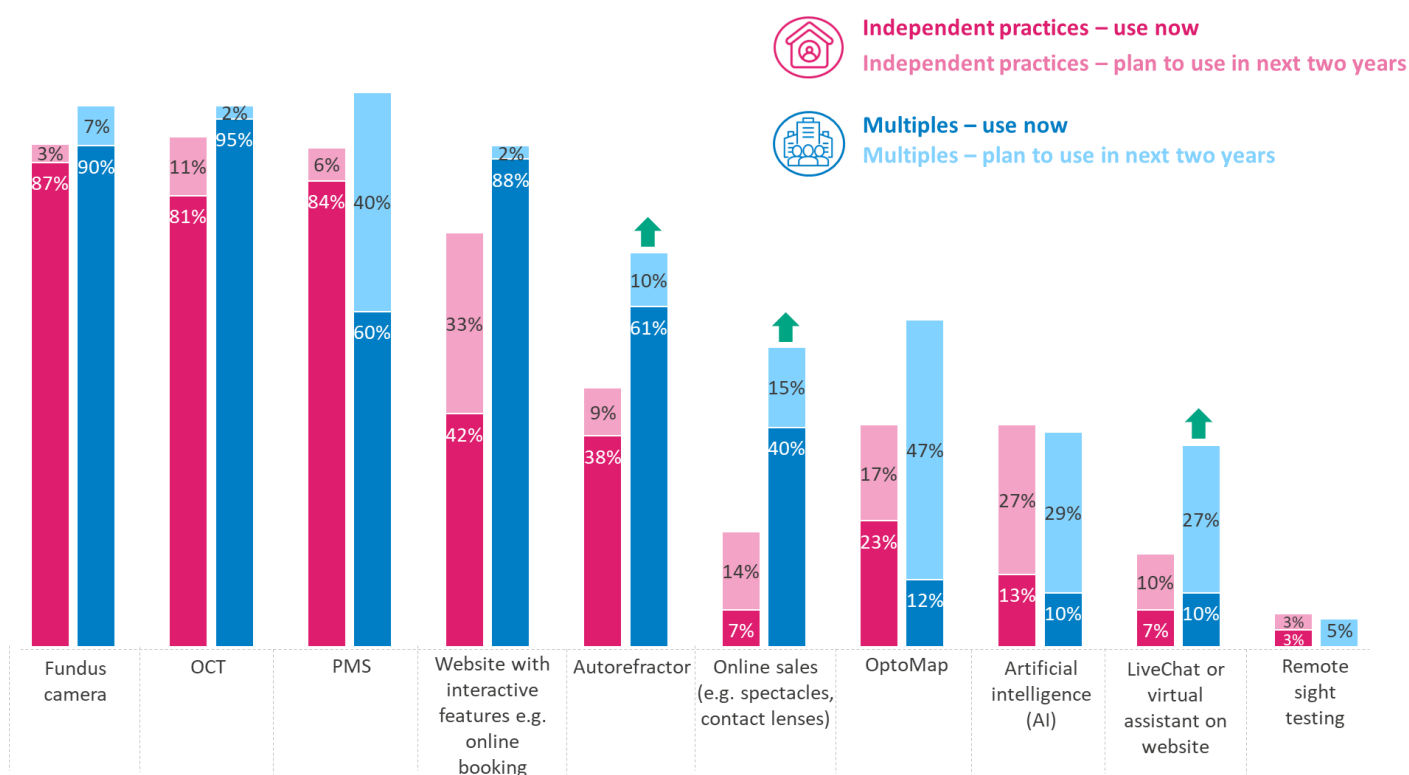
The largest increases in adoption over the next two years are mostly expected to be for online technologies, with artificial intelligence (28%), PMS/electronic records (20%), websites with interactive features (19%), and LiveChat / virtual assistants (17%) all expected to increase in uptake over that period. OptoMap is the only diagnostic tool that is expected to have similarly high levels of increased adoption (30%).

When comparing this data against that of last year, uptake of OptoMap is significantly higher, with almost half either using or planning to use it in the next two years (48%) compared to under a third last year (30%). The same is also true of artificial intelligence, with its current and planned usage this year (39%) significantly higher than last (27%).

There are also several significant differences between sub-groups in terms of the adoption of these technologies. Remote sight testing was more likely to be either used or planned to be used by numerous business types, including those **established less than ten years ago** (21%) and those in **rural locations** (19%). Similarly, online sales were more likely to currently be offered or planned to be offered by **businesses with 20+ employees** (72%). The greatest differentiation between subgroups was between **independent practices** and **multiples**, as outlined in figure 15.



**Figure 15 – Types of technology that businesses use, plan to use, or have no current plans to use over the next two years (independent practices vs multiples)**



**Does your business use, or plan to use in the next two years, the following types of technology?**  
*(Independent practices base: n=150; Multiples base: n=42). Green arrows represent significant increase over other business structures when considering current and planned usage together ( $p < 0.05$ ).*

**Multiples** are significantly more likely to currently be using a number of technologies compared to **independent practices**, namely websites with interactive features such as online booking (88%), autorefractors (61%), and online sales (40%), while **independent practices** are more likely to currently be using PMS/electronic patient records (84%). When considering both current and planned use over the next two years, **multiples** are still significantly more likely to have adopted autorefractors (71%) and online sales (54%), as well as LiveChat or virtual assistants (36%), when compared to **independent practices**.

### 3.3 Training, regulation, and industry standards

Questions were asked to registered businesses to explore the education, training and development landscape for optical professionals, as well as business perceptions of costs of regulation and industry standards. The following section addresses key questions in these areas, split into:

- **Placements for optical students:** which registered businesses offer them or have plans to offer them, how numbers of placements are changing between years, and what the perceived benefits and barriers are to businesses offering placements
- **Continuing professional development (CPD) and staff support:** what CPD is offered by registered businesses, how CPD compliance is monitored, and what support mechanisms are in place for staff facing issues such as bullying, harassment, abuse or discrimination
- **Perceptions of costs of regulation:** how registered businesses perceive GOC business registrant registration fees and whether they would benefit from paying them in instalments throughout the year, whether registered businesses pay their employees' individual registration fees, perceptions of various ongoing compliance costs, and what the perceived benefits of GOC business registration are
- **Perceptions of and compliance with industry standards:** exploring registered businesses' perceptions of the GOC's standards for optical businesses and gauging opinions on whether optical businesses providing restricted functions should be regulated by GOC

#### 3.3.1 Placements for optical students

Roughly a quarter (25%) of businesses surveyed currently have arrangements with universities or the College of Optometrists to offer placements to optical students during their studies. This was significantly more common amongst **multiples** (44%) than **independent practices** (11%), and significantly less likely amongst **businesses with nine or fewer employees** (7%).

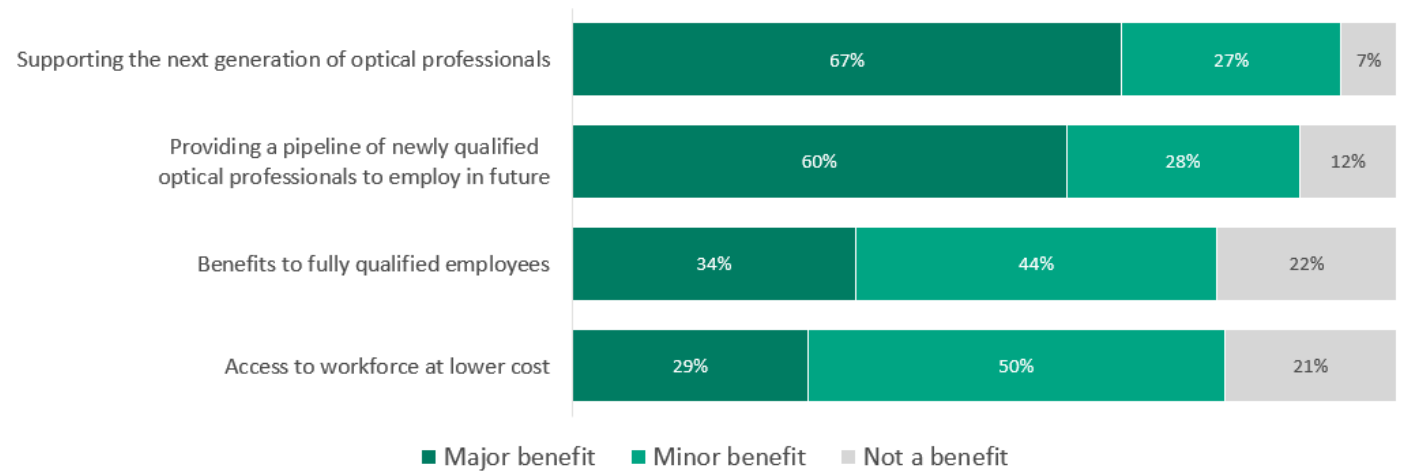
Of the businesses that do not currently offer placements to optical students, roughly a quarter (27%) plan to offer them in the next two years, with the figure again being higher amongst **multiples** (44%) than **independent practices** (19%).

Of the businesses that do offer placements, around half have found the number of placements this year to be consistent with previous years (49%), compared to around a quarter believing they are increasing (24%) and a minority believing they are decreasing (9%). Around a fifth (18%) indicated that they did not know. The majority of businesses offer them to student optometrists only (52%) or to both student optometrists and student dispensing opticians (44%), with very few offering them only to student dispensing opticians (4%).

The figures around the offering of placements are all in line with those of last year, with no significant differences.

Registered businesses were also surveyed to understand the perceived benefits of offering placements to optical students, as illustrated in figure 16.

**Figure 16 – Perceived benefits of offering placements to optical students**



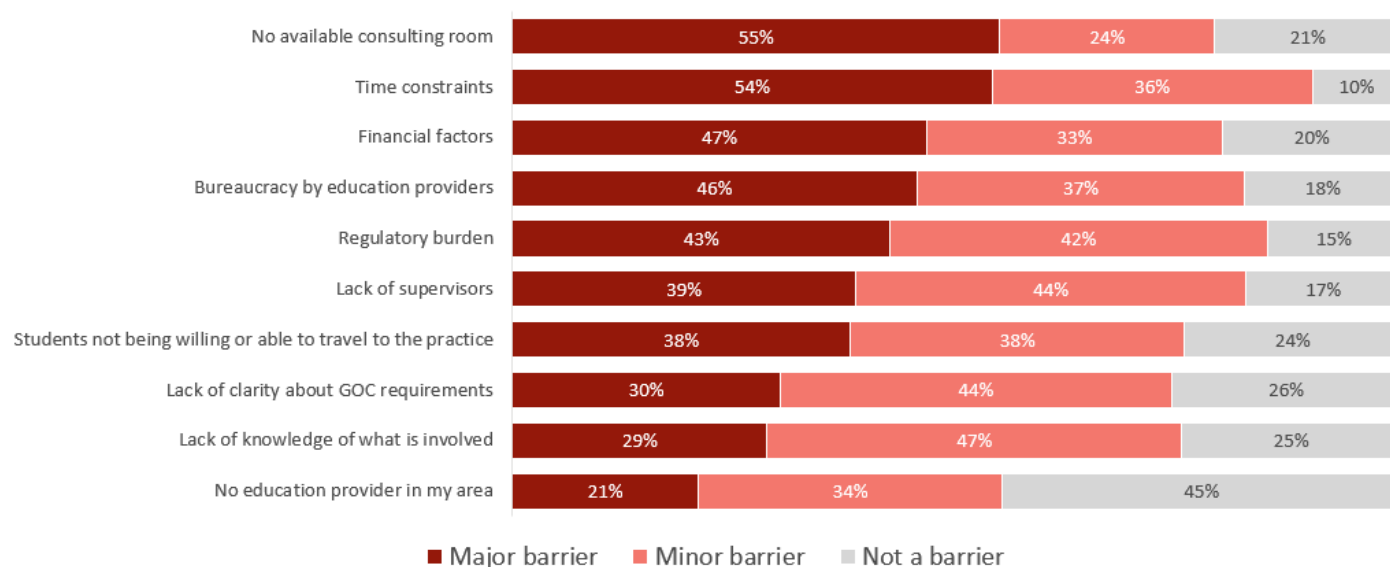
*What do you see as the main benefits of offering placements to optical students? (base all: n=192)*

The primary benefits to offering placements to optical students were future-facing, with the majority seeing a major benefit in supporting the next generation of optical professionals (67%) and providing a future pipeline of newly qualified optical professionals (60%). More immediate benefits were expressed to a lesser extent, with some seeing a major benefit to their fully qualified employees (34%) and accessing a workforce at a lower cost (29%). These figures are in line with those of last year.

Businesses surveyed were also given the opportunity to provide other reasons for offering placements to optical students, where a few provided other reasons explaining why it is a major benefit (5%) and others gave reasons why it is not a benefit (7%). Those who gave reasons for it as a major benefit described further benefits around developing an informed workforce (n=4) or accessing new viewpoints and mindsets (n=1), whereas the reasons for not seeing a benefit were either due to a perceived financial burden from training or regulation (n=5) or a lack of pre-registrant job security from the new Clinical Learning in Practice (CLiP) scheme (n=2).

Data was also collected to understand the perceived barriers to offering optical students placements, which figure 17 presents.

**Figure 17 – Perceived barriers to offering placements to optical students**



*What do you see as the main barriers to offering placements to optical students? (base all: n=192)*

The most prevalent major barriers to offering placements to optical students were a lack of available consulting room (55%) and time constraints (54%). Continuing the trend of last year, there was seen to be a wide variety of financial, resource-related and regulatory barriers to offering placements to optical students, with almost all reasons in the survey selected as a major or minor barrier by at least half of the sample.

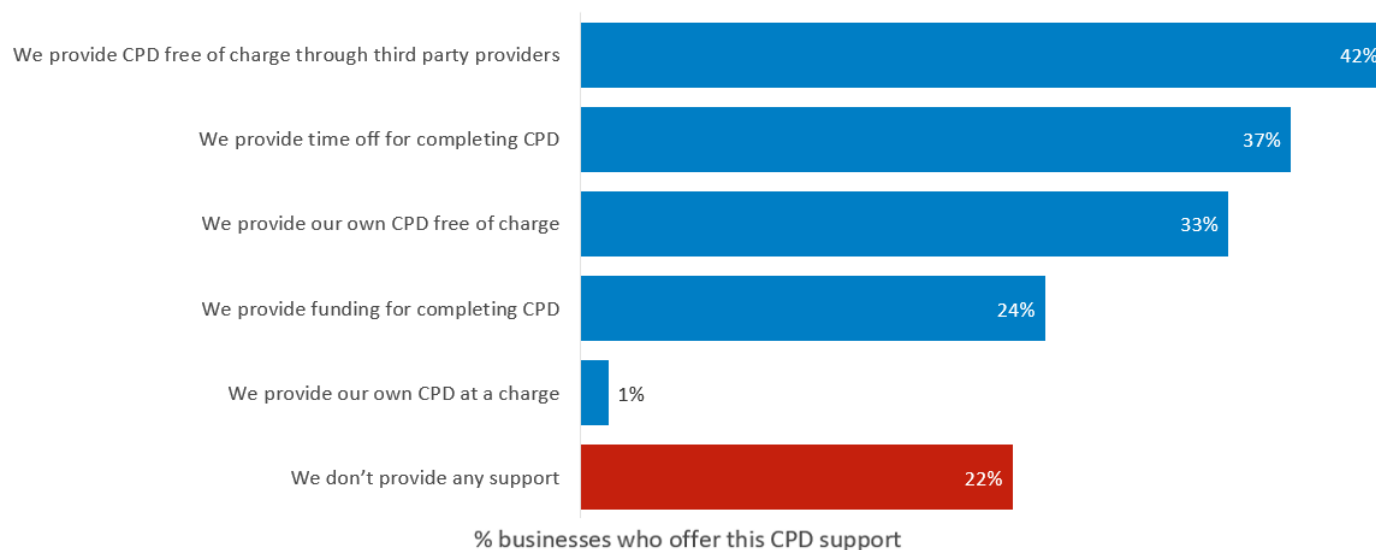
Surveyed businesses were also given the opportunity to suggest other barriers to offering optical student placements, of which a few (5%) identified further major barriers. Of these, notable barriers included perceived issues in attitude or ability of students (n=3) and poor training of existing staff (n=1).

There were no significant differences reported between groups in terms of perceived barriers, suggesting barriers are experienced equally amongst business types.

### 3.3.2 Continuing professional development and staff support

New this year, registered businesses were asked in what ways they offer support to registrant employees to complete their continuing professional development (CPD) requirements, which is illustrated in figure 18.

**Figure 18 – Forms of continuing professional development (CPD) support offered by businesses**



*In what ways, if any, does your business support its registrant employees to complete their continuing professional development (CPD) requirements? (base all: n=192)*

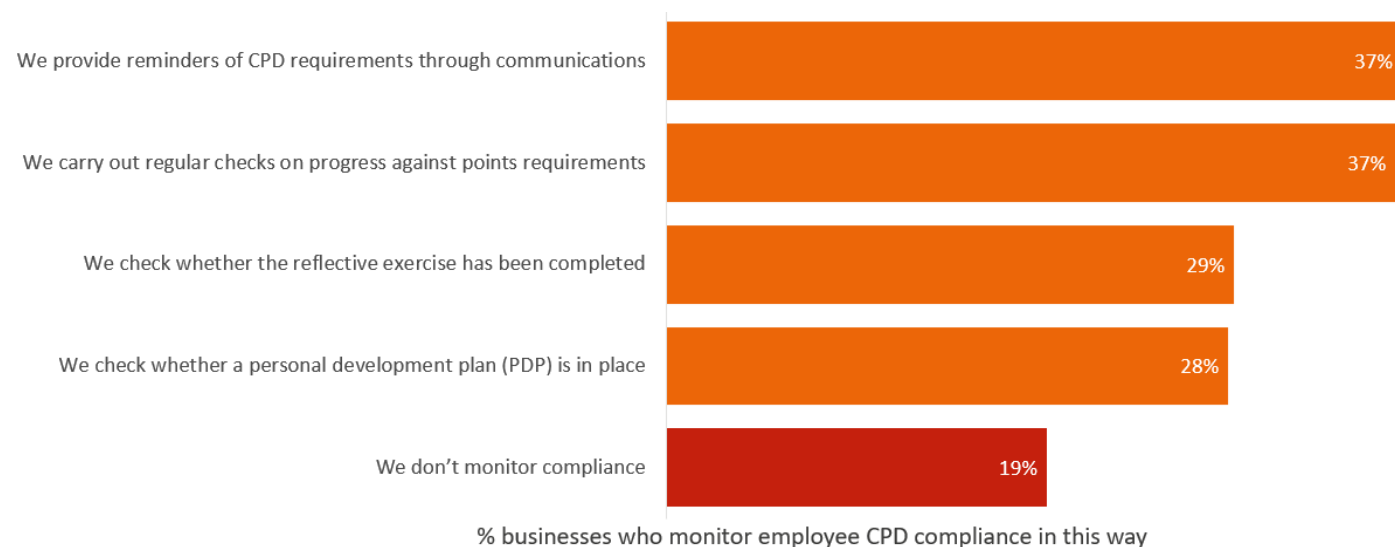
The most common form of support offered is the free provision of CPD through third party members, which was offered by around 2 in 5 businesses (42%), followed by providing time off for CPD (37%) and providing their own CPD free of charge (33%). Around a quarter of businesses provide funding for employees to complete CPD (24%), while very few provide their own CPD at a cost (1%). Almost a quarter of businesses indicated that they provide no support for CPD to their employees (22%).

There were numerous significant subgroup differences in terms of CPD provision. **Businesses formed in the last ten years** were more likely to provide CPD at a charge (10%), while those who provide no CPD support were more likely to be businesses who are **independent practices** (32%), have an **annual turnover of less than £250k** (44%) or have **four or fewer employees** (43%). Conversely, businesses with **20 or more employees** were much more likely to provide their own CPD free of charge (77%), as were **multiples** (58%) and those with **annual turnovers over £1m** (82%).

A small minority of businesses indicated that they supported their registrant employees' CPD through other ways (5%), all of which came from **independent practices**. Of these, there were several mentions (n=4) of either financial support or direct CPD provision from other bodies such as the NHS, Primary Care Support England (PCSE), or AOP/ABDO.

Registered businesses were then asked in what ways they monitor whether their registrant employees are complying with their CPD requirements, the findings for which are outlined in figure 19.

**Figure 19 – Means of monitoring employee CPD compliance**



*In what ways, if any, does your business monitor whether its registrant employees are complying with their CPD requirements? (base all: n=192)*

Registered businesses were most likely to monitor CPD compliance through either providing reminders in communications (37%) or carrying out regular checks on progress against points requirements (37%), with these each being done by over a third of businesses. Checking for qualitative markers of progress is slightly less common, with just over a quarter checking whether the reflective exercise has been completed (29%) and a further quarter checking whether a personal development plan (PDP) is in place (28%). Conversely, around 1 in 5 businesses do not monitor CPD compliance (19%).

There were a few significant subgroup differences in terms of how CPD compliance is monitored, centred on business size and structure. Smaller registered businesses were significantly more likely to not monitor compliance, such as **independent practices** (28%), businesses with **four or fewer employees** (26%) or those with an **annual turnover of less than £250k** (35%), while larger businesses were significantly more likely to provide reminders of CPD requirements through communications, such as **multiples** (51%) and those with an **annual turnover of £1m+** (56%).

A few businesses indicated that they monitored their registrant employees' CPD through other means (10%). When asked to specify, notable mentions concerned informal conversations with employees about CPD progress (n=4) and monitoring to check registration has been maintained (n=2).

Finally, registered businesses were asked what support mechanisms they have in place for staff facing issues such as bullying, harassment, abuse or discrimination, which is illustrated in figure 20.

**Figure 20 – Support mechanisms in place for staff facing issues such as bullying, harassment, abuse or discrimination**



**What support mechanisms, if any, do you have in place for staff facing issues such as bullying, harassment, abuse or discrimination? (base all: n=192)**

The majority of registered businesses had some form of policy to support staff facing these issues, such as guidance for what to do when experiencing issues (65%) or an acceptable behaviour policy (60%). Training, such as for managing difficult/abusive customers (50%), regarding equality, diversity and inclusion (47%), and how to recognise and address bullying, harassment, abuse or discrimination (43%), were also each implemented by around half of registered businesses. Conversely, dedicated support roles, such as mental health first aiders (23%) and speaking up guardians (20%), were employed by less than a quarter of businesses, and a small minority of registered businesses indicated that they currently had no support mechanisms in place (9%).

A few businesses indicated that they had alternative support mechanisms in place (5%). There were many mentions from businesses with **fewer than nine employees** of a mutually supportive culture in the company with open communication channels (n=8), as well as individual mentions of paid time off for mental health care and access to external counsellors.

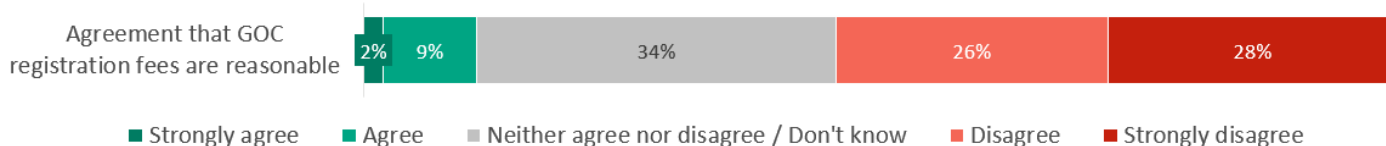
When comparing subgroup differences, there were several support mechanisms that were more likely to be implemented by **multiples** than **independent practices**. These consisted of: training on recognising bullying, harassment, abuse or discrimination (70% multiples, 23% independent); training on equality, diversity and inclusion (71% multiples, 28% independent); guidance or training on dealing with difficult or abusive customers (66% multiples, 38% independent); a confidential staff helpline (56% multiples, 6% independent); signage for patients warning against bullying/harassment/abuse/discrimination (48% multiples, 17% independent); mental health first aiders (44% multiples, 8% independent); and speaking up guardians (31% multiples, 11% independent).



### 3.3.3 Perceptions of costs of regulation

Registered businesses were asked to what extent they agreed that GOC registration fees are reasonable, which is illustrated in figure 21.

**Figure 21 – Perceptions of GOC registration fees**



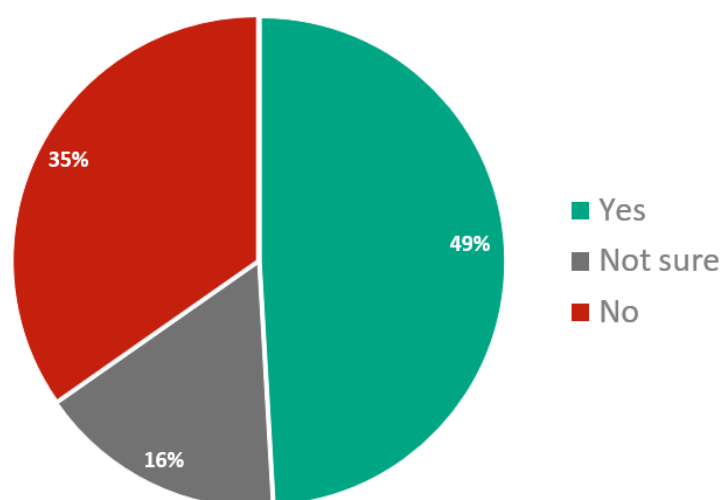
*Please indicate to what extent you agree or disagree that the GOC registration fees are reasonable. (base all: n=192)*

More registered businesses expressed disagreement (“disagree” or “strongly disagree”) about the GOC registration fees being reasonable (54%), in comparison to those that expressed agreement (“agree” or “strongly agree”) (11%). There were no significant differences between subgroups or in comparison to the previous year.

The registered businesses who expressed disagreement about the GOC registration fees being reasonable were then invited to explain why they believed this via an open-ended text field. The most common reasons, once coded as a percentage of the total sample, concerned a perceived high cost of the fees (21%) as well as a lack of value for money (18%), followed by a sense of injustice at having to pay both a professional and a business registration fee (13%) or at the blanket approach to determining both dispensing optician and optometrist fees (3%). Several business registrants also indicated that there was a lack of visible benefit to registration (8%) and that the GOC should be doing more with the fees to protect businesses from unregulated competition (8%).

New this year, registered businesses were also asked whether or not they would prefer to pay GOC registration fees in instalments throughout the year, the findings for which are illustrated in figure 22.

**Figure 22 – Desire to pay GOC registration fees in instalments throughout the year**

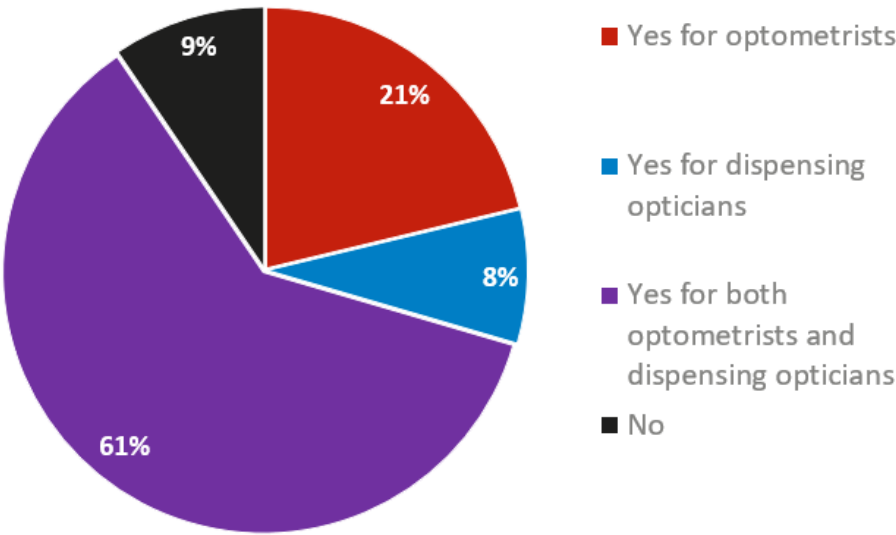


*Do you wish to be able to pay GOC business registration fees in instalments throughout the year? (base all: n=192)*

Around half (49%) of registered businesses indicated they would like to be able to pay their registration fees in instalments, with around a third (35%) stating they would not like the ability to do so. There were no significant subgroup differences in terms of desire to pay registration fees in instalments.

Registered businesses this year were also asked if their business pays the individual registration fee on behalf of their registrant employees, as shown in figure 23.

**Figure 23 – Whether registered businesses are paying employees’ individual registration fees**

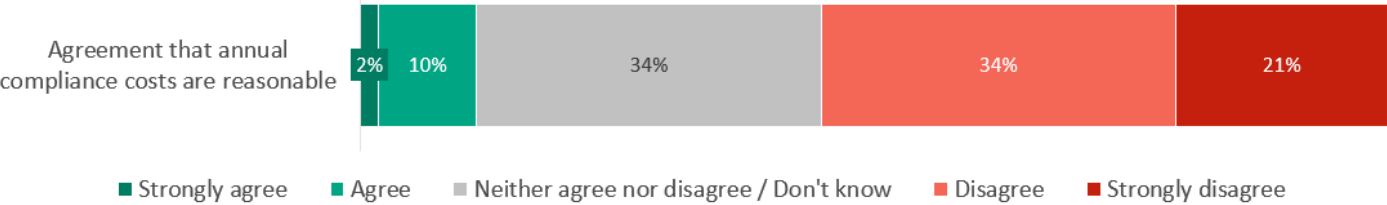


*Does your business pay the individual registration fee on behalf of its registrant employees? (base all: n=192)*

The majority of registered businesses pay the individual registration fee for both optometrists and dispensing opticians (61%), while around a fifth pay only for optometrists (21%) and a tenth pay only for dispensing opticians (8%). Smaller businesses were significantly more likely to only pay for optometrists, such as businesses of **nine or fewer employees** (31%) and those with an **annual turnover of less than 250k** (41%).

Registered businesses were also asked to what extent they agreed that ongoing compliance costs are reasonable, which is illustrated in figure 24.

**Figure 24 – Perceptions of ongoing compliance costs**



*Please indicate to what extent you agree or disagree that the annual compliance costs your business faces are reasonable. (base all: n=192)*

More registered businesses expressed disagreement (“disagree” or “strongly disagree”) that ongoing compliance fees are reasonable (55%), in comparison to those that expressed agreement (“agree” or “strongly agree”) (12%). There were no significant differences between subgroups or in comparison to the previous year. A breakdown of perceptions of various specific compliance costs is presented in figure 25.

**Figure 25 – Breakdown of perceptions of various ongoing compliance costs**



*Please indicate to what extent you agree or disagree that the cost of ongoing compliance for the following types of regulation is reasonable: (base all: n=192)*

Surveyed businesses were most likely to express agreement (“agree” or “strongly agree”) that the compliance costs for maintaining patient records (58%), safeguarding requirements (53%), health and safety (52%), professional indemnity insurance (52%), and CPD undertaken by employees (50%) are reasonable. The only compliance costs that were not most likely to be considered reasonable were NHS commissioning requirements, which were slightly more likely to be to be considered reasonable (“disagree” or “strongly disagree”) (35%), and information requests from the GOC, to which businesses were most likely to respond “neither agree nor disagree” / “don’t know” (45%).

Finally, new to this year’s survey, registered businesses were asked what they believed the benefits of GOC regulation to be for their business, as illustrated in figure 26.

**Figure 26 – Perceived benefits of GOC regulation for each business**



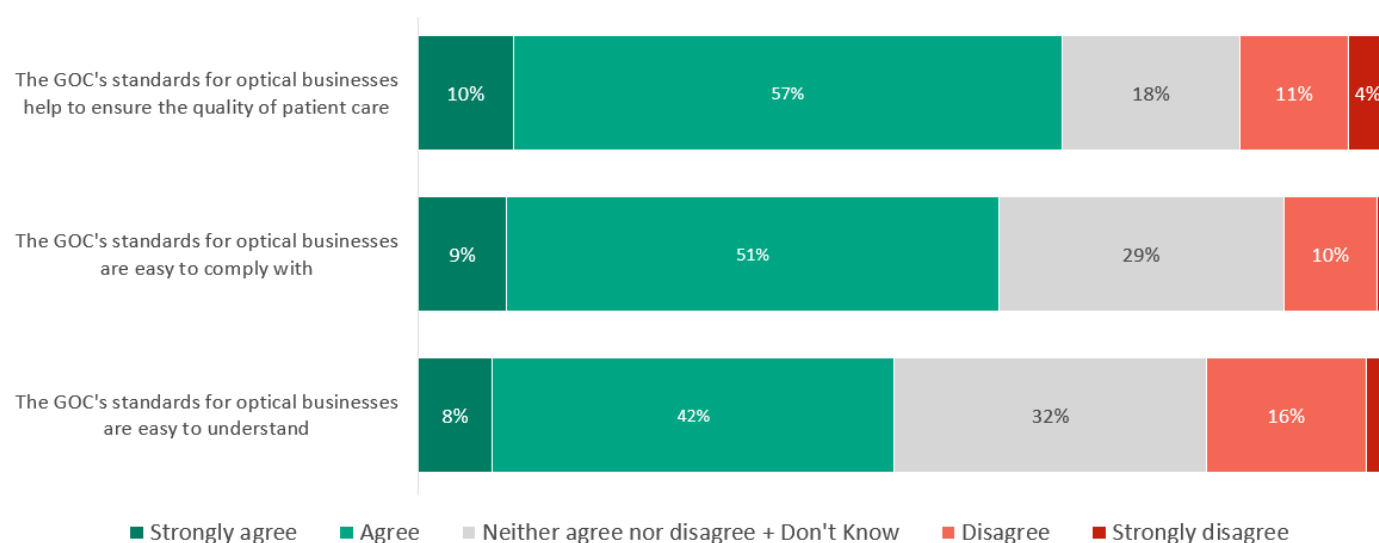
*What do you consider to be the benefits of GOC regulation for your business? (base all: n=192)*

The most prevalently perceived benefits were supporting appropriate standards of behaviour and performance by registrant employees (59%), increasing safety for optical patients and members of the public (52%), and ensuring that only businesses that are fit to carry on business are allowed to operate (51%), which were each considered benefits by most businesses. There were no significant differences between business subgroups regarding perceived benefits of GOC regulation.

### 3.3.4 Perceptions of and compliance with industry standards

Businesses' perceptions of the GOC's standards for optical businesses were also explored, with the responses illustrated in figure 27.

**Figure 27 – Perceptions of the GOC's standards for optical businesses**



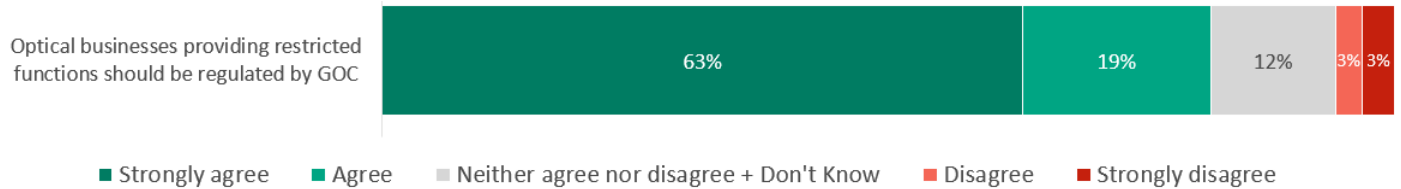
*Please indicate the extent to which you agree or disagree that...: (base all: n=192)*

The majority of businesses surveyed expressed agreement (“agree” or “strongly agree”) that the GOC’s standards for optical businesses help to ensure quality of patient care (67%) and that they are easy to comply with (60%), and half agreed that they are easy to understand (50%). There were no significant differences found between subgroups regarding perceptions of the standards.

Although there were no significant differences between the results of this year and last year, there are indicative increases in satisfaction for all three perception questions this year. The largest can be seen in the GOC’s standards for optical businesses being easy to comply with (“agree” or “strongly agree”: 60% this year, up from 54% last year) and ensuring the quality of patient care (67%, up from 61%), while perceptions of the standards being easy to understand has also seen a small increase (50%, up from 46%).

New to this year’s survey, registered businesses were also asked to describe their agreement with the GOC’s position that all optical businesses providing particular restricted functions should be regulated by the GOC, the findings for which are presented in figure 28.

**Figure 28 – Agreement that optical businesses providing restricted functions should be regulated by GOC**



*Please indicate to what extent you agree or disagree with the GOC’s position that all optical businesses providing particular restricted functions should be regulated by the GOC? (NB The restricted functions are: sight testing; contact lens fitting; supply of prescription and zero powered cosmetic contact lenses; and spectacle sales to the under 16s and those who are registered sight impaired or severely sight impaired.): (base all: n=192)*

The majority of businesses agreed (“agree” or “strongly agree”) that optical businesses providing the listed functions should be regulated by the GOC (82%), while a minority (6%) expressed disagreement (“disagree” or “strongly disagree”). Although there were no significant subgroup differences found, there are indicative findings that suggest some registered business types are less likely to strongly agree with the statement, namely **independent practices** (57%), those **established less than ten years ago** (50%) and those with **four or fewer employees** (54%).

### 3.4 Business performance and challenges

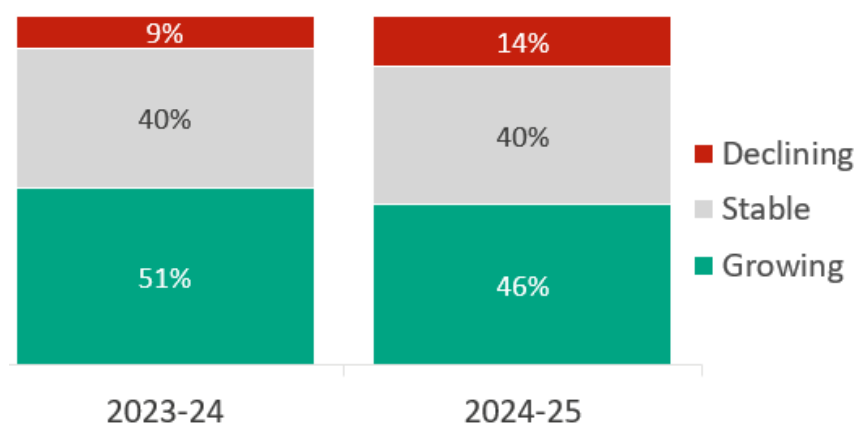
Several questions were asked to registered businesses to understand their performance, current challenges – including their experience recruiting optical professionals – and their outlook for the future. This section explores these topics and is separated into:

- **Business performance:** the levels of growth for businesses in the last year as well as their expected growth for the forthcoming year
- **Challenges for the business:** which challenges are most impacting businesses currently, including any difficulties recruiting optical professionals and suggested reasons behind them
- **Use of locums:** how many businesses are using locums, and their reasons for doing so
- **Perceptions of the future:** how optimistic businesses currently feel for their own business, as well as for primary eye care and optical businesses as a whole

#### 3.4.1 Business performance

Businesses were asked several questions to understand perceptions of performance over the recent past and upcoming future. Data was initially collected to understand how registered businesses have performed over the last 12 months, which is illustrated in figure 29.

**Figure 29 – Business performance over the last 12 months (year on year comparison)**

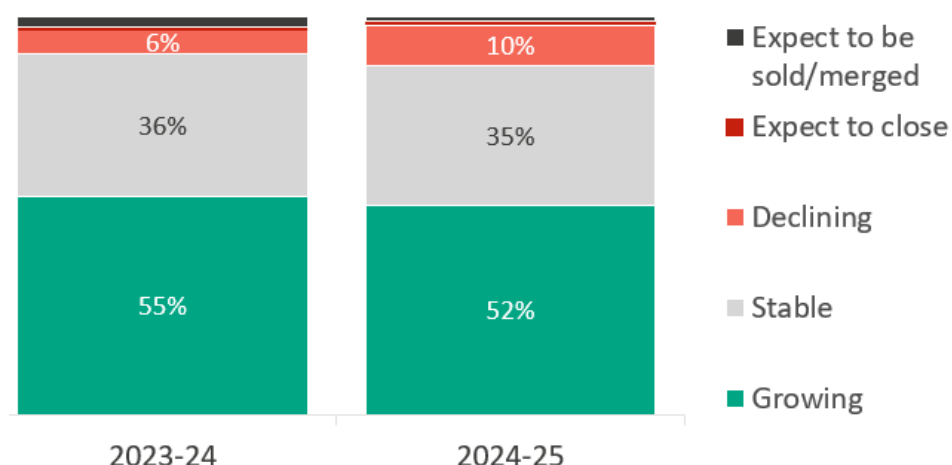


*Reflecting on the last 12 months, which of the following best describes how your business has performed overall? (total base 2023-24: n=214; total base 2024-25: n=192)*

This year, around half of registered businesses described their business as growing over the last 12 months (46%), with a small minority (14%) describing it as declining. Although these figures represent a small reduction in growth compared to the previous year (51% growing; 9% declining), this difference was not statistically significant. There were no statistically significant differences found between subgroups this year.

Registered businesses were then asked to describe the outlook for their business over the next 12 months, which is illustrated in figure 30.

**Figure 30 – Business outlook over the next 12 months**



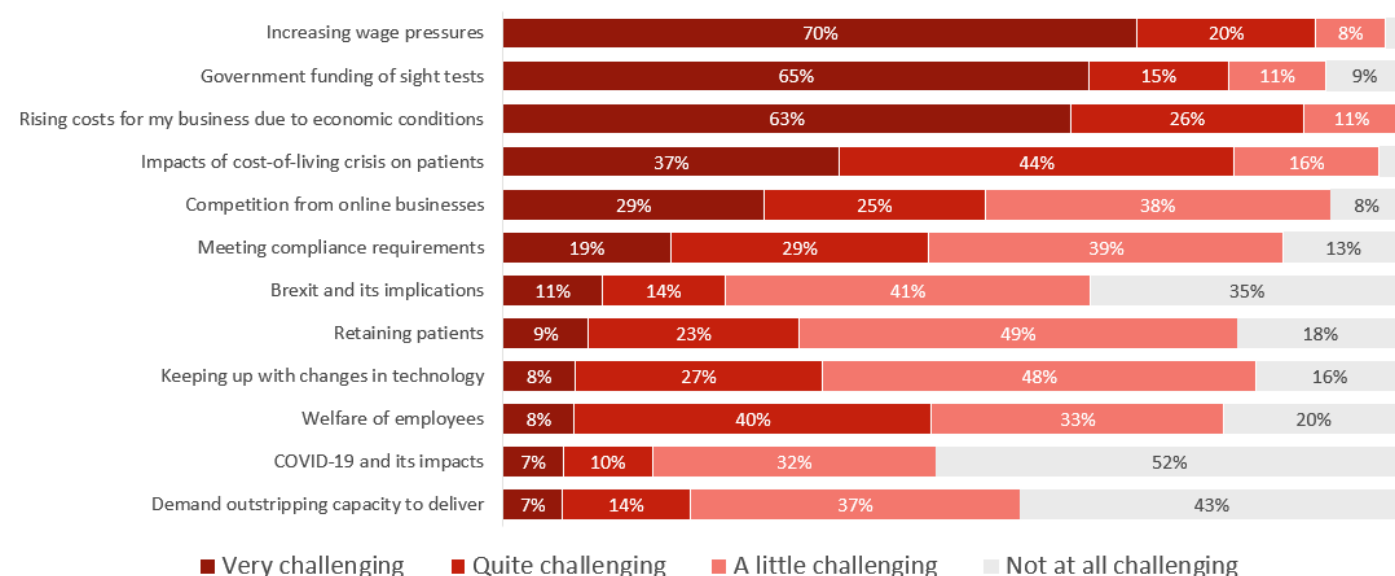
*Thinking about the next 12 months, what is the outlook for your business? (total base 2023-24: n=214; total base 2024-25: n=192)*

Growth projections this year follow those of last year, with the majority (52%) anticipating growth, and a minority (11%) expecting to decline or close. There were no significant differences found between subgroups or in comparison with the previous year.

### 3.4.2 Challenges for businesses

Businesses were asked to rate how challenging a variety of factors that may be facing their business were, as illustrated in figure 31.

**Figure 31 – Perceptions of potential challenges to businesses**



*Please rate the following challenges that might be facing your business. (base all: n=192)*



In line with the previous year, the top three challenges to businesses are financial, with the majority rating increasing wage pressures (70%), government funding of sight tests / eye examinations (65%), and rising costs due to economic conditions (63%) as very challenging. Potential loss of business was also a common concern, with the majority rating the cost-of-living crisis on patients as either quite or very challenging (81%) and over half indicating this for competition from online businesses (54%), whereas less than a quarter (21%) indicated this for the prospect of demand outstripping capacity to deliver.

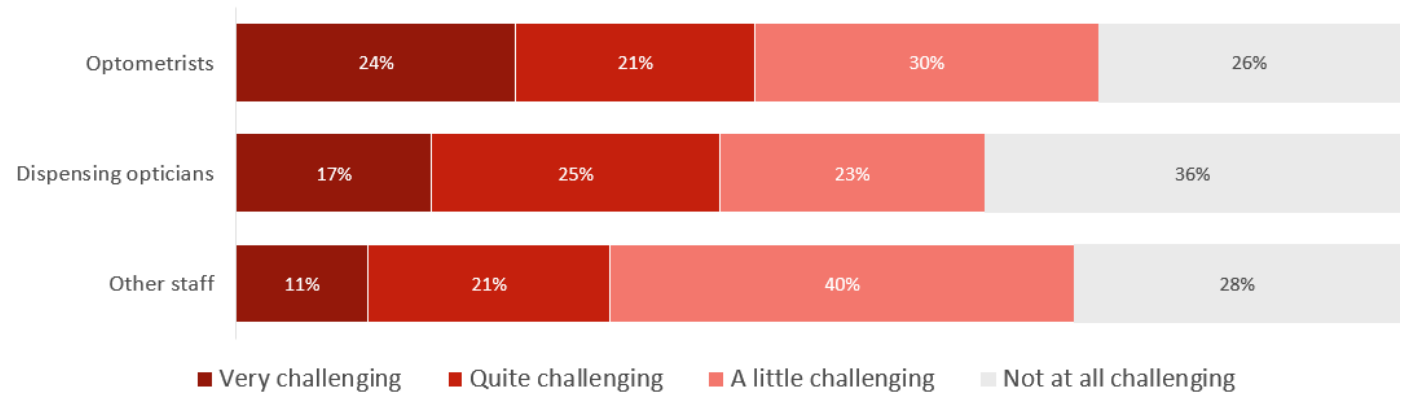
When exploring subgroups, businesses in **England** were significantly more likely to find government funding of sight tests to be very challenging (73%) when compared to other nations. Despite their small sample size, there is a significant indication that businesses operating from **Other e.g. mobile** are much more likely to find demand outstripping capacity to deliver to be very challenging (65%), suggesting there may be fewer concerns about loss of business for this business type.

Compared to the previous year, businesses are now significantly more likely to find COVID-19 and its impacts to be not at all challenging (52%) when compared to the last year (30%), implying a continued recovery from the negative business impact of the pandemic over the last year.

Of the surveyed businesses, a few (9%) also suggested other factors that were very challenging to their business. When prompted to specify, notable challenges mentioned included General Ophthalmic Services (GOS) fees or NHS funding being too low (n=3), online contact lens sales and sales from unregistered sellers (n=3), difficulties recruiting and retaining staff (n=2), lack of public awareness to get sight tests (n=1), excessive CPD requirements (n=1), lack of regulatory change (n=1), concerns over the national 2024 budget (n=1), and perceived substandard representation from the Optometric Fees Negotiating Committee (OFNC) (n=1).

As a development to this year’s survey, registered businesses were asked separately how challenging it has been to recruit optometrists, dispensing opticians and other staff in the last 12 months, providing granularity over recruitment difficulties for each role that was not present in the previous year’s survey. These findings are illustrated in figure 32.

**Figure 32 – Difficulties recruiting different staff types**



*Reflecting on the last 12 months, how challenging has it been for your business to recruit staff? (base all: n=192)*

Registered businesses were most likely to indicate difficulties recruiting optometrists over the last 12 months, with almost a quarter of businesses finding it very challenging (24%), compared to a sixth of businesses indicating this for dispensing opticians (17%) and around 1 in 10 for other staff (11%). When

comparing subgroup differences, certain business types were significantly more likely to find it very challenging to recruit optometrists, particularly those with **annual turnovers of over £1m** (47%).

Registered businesses were then asked the reasons why they believed they had not been able to recruit staff, as illustrated in figure 33.

**Figure 33 – Reasons for recruitment difficulties**



*Reflecting on the last 12 months, what were the reasons for not being able to recruit staff? (base those who had found recruiting one staff type or more to be at least a little challenging: n=158)*

Registered businesses were most likely to have trouble recruiting in the last 12 months due to a shortage of professionals in the area, with almost two-thirds suggesting it as a reason (61%). Outside of this key situational barrier, the other two most commonly encountered issues concerned potential employee motivations, specifically expectations of the job (47%) and their preference for locum working (40%).

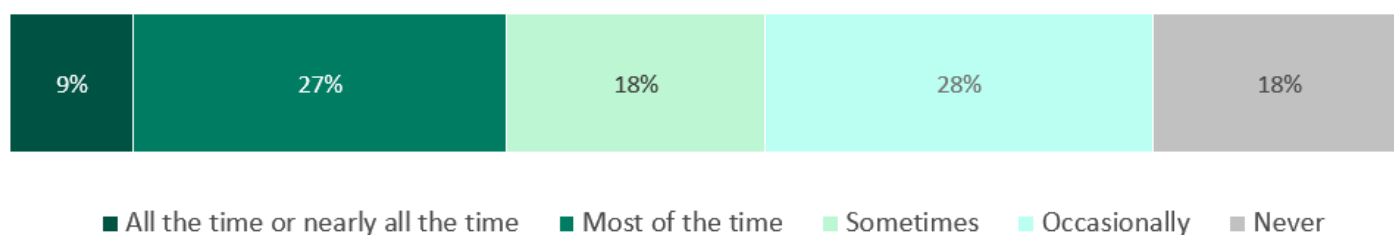
When considering subgroup differences based on business type, business size appeared to significantly impact to what extent expectations of the job was suggested as a reason for recruitment difficulties, with businesses with **four or fewer employees** being substantially less likely to cite it as a barrier (20%) when compared to those with **more than 20 employees** (78%) and with an **annual turnover of greater than £1m** (73%).

There were also notable subgroup differences based on which role in particular businesses have had trouble recruiting. Those who had found recruiting optometrists ‘very challenging’ over the last 12 months were significantly more likely to suggest a shortage of professionals in the area (92%) and potential recruits not wanting to work in the location (51%) to be an issue, suggesting regional diversity of this group may be an issue; conversely, those who had found recruiting non-optometrist and non-dispensing optician roles to be very challenging were significantly more likely to attribute it to a preference for part-time working (61%).

3.4.3 Use of locums

Registered businesses were surveyed to understand their use of locums in the last 12 months, the results for which are depicted in figure 34.

**Figure 34 – Use of locums within the last 12 months**



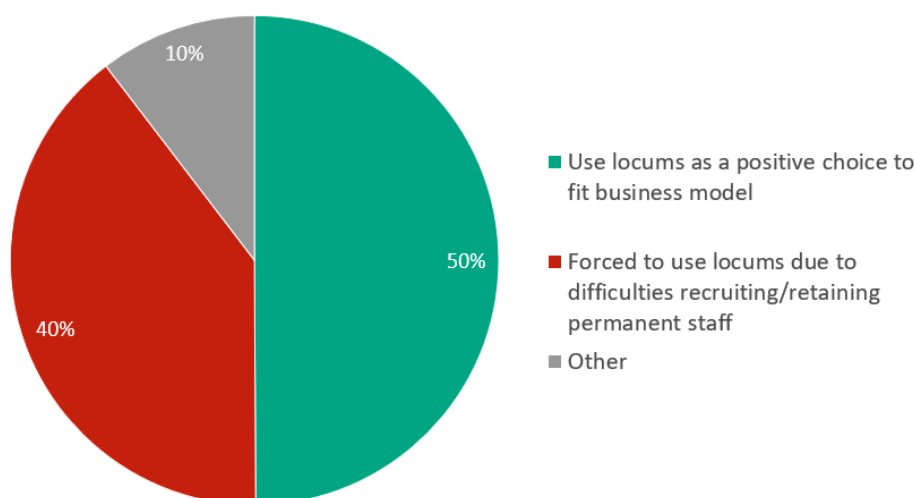
*To what extent has your business used locums in the last 12 months? (base all: n=192)*

Just over half of registered businesses have used locums at least sometimes over the last 12 months (54%), while just over a third have used them either most of the time or all of the time (36%). Under a fifth of businesses state they have never used locums over the last year (18%). Of the subgroups, registered businesses with an **annual turnover of less than £250k** were significantly more likely to have never used locums (37%).

The overall locum usage data this year roughly mirrors that of last year, with no significant differences between them; however, **independent practices** were less likely to say they had never used locums over the preceding 12 months (25%, vs 36% last year), which means their locum usage is no longer significantly different to that of **multiples** (10% “never” this year, 8% last year).

Businesses were also asked to indicate why they use locums, which is illustrated in figure 35.

**Figure 35 – Primary reasons for using locums**



*Which of the following best represents the reasons why you use locums? (those who have used locums in the last 12 months base: n=151).*

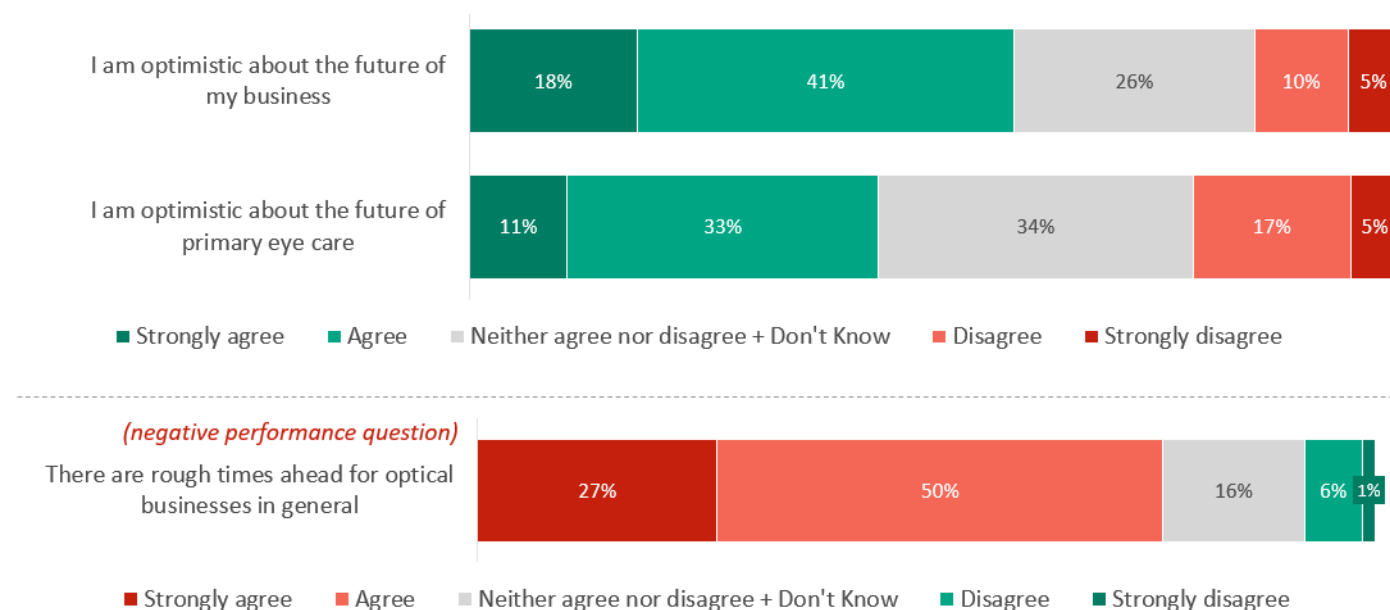
Of the two pre-coded options, half of registered businesses indicated they use locums as a positive choice to fit their business model (50%), and two-fifths said they are forced to use them due to permanent staffing difficulties (40%). One in ten registered businesses suggested there were other reasons for using locums (10%); of these, the large majority indicated they use them only to cover holidays, sickness and maternity leave (n=12). Beyond this, a few indicated that they preferred the flexibility locums offer (n=2), while others clarified that they only used locums they were very familiar with (n=3).

These findings mirror those of the previous year, with no significant differences between the data. There is nevertheless an indicative suggestion that **multiples** may be growing more likely to use locums as a positive choice to fit their business model (46%), as they are no longer significantly more likely to use locums due to staffing difficulties (49%) (2023-24 multiples data: 'positive choice to fit business model' 33%; 'forced to use locums' 49%).

### 3.4.4 Perceptions of the future

Registered businesses were asked to what extent they agreed with statements regarding their outlook for the future of their business and for primary eye care, which is illustrated in figure 36.

**Figure 36 – Outlook for the future**



*Please indicate the extent to which you agree or disagree that... (base all: n=192)*

Businesses overall are positive about the future of their organisation, with most (59%) expressing agreement (“agree” or “strongly agree”) with the associated statement.

Despite a general trend of optimism and growth reported by businesses, there remains uncertainty when the optical industry was considered as a whole. Almost half (44%) expressed agreement that they are optimistic for the future of primary eye care, and around a quarter (22%) disagreed or strongly disagreed with the statement. Furthermore, the majority (77%) of businesses agreed or strongly agreed with the statement that “There are rough times ahead for optical businesses in general”.

Although these findings mirror those of the previous year, with no significant differences found between the data, the number of businesses that expressed disagreement (“disagree” or “strongly disagree”) with the notion that they are optimistic for the future of eye care has indicatively decreased from the previous year (22%, vs 32% last year). There were no statistically significant differences found between subgroups for any of the statements.

## 4 Appendices

### 4.1 Technical appendix

#### 4.1.1 Methodology

##### 4.1.1.1 Questionnaire

A questionnaire was designed by the GOC and Impact Health which can be found in its entirety in section 4.2. The median amount of time it took businesses to complete the survey was 18 minutes.

##### 4.1.1.2 Promotion of the survey

The survey was securely hosted online, with registered businesses invited to complete it via a link. Two types of links were used to gain responses for the survey: a personalised link for independent businesses with unique emails tied to their practice, and a generic link for businesses who did not have unique emails, such as multiples and businesses operating under the Hakim Group.

The personalised link was sent to 1,637 business registrants, who were each contacted a total of four times to maximise response rate.

The generic, open-access link was promoted by the GOC and stakeholder organisations via email newsletters and social media, including support from multiples who helped to promote the survey to joint ventures and franchises in their group.

As an incentive, a £50 Amazon voucher was offered to five of the businesses who completed the survey, selected at random by an independent third party.

##### 4.1.1.3 Validating responses

In the survey, businesses were asked to confirm that they were registered with the GOC and that the individual responding had sufficient responsibility to answer for their business, either by owning the business, being a practice manager or other senior manager of the business, or being authorised on behalf of one to complete the survey, as well as ensuring they had access to information about the business structure and operations necessary for the survey. All businesses were also asked to give responses only for the business they own and manage, as opposed to any parent company they operate under.

For the purposes of weighting and assessing response rates, independent practices who had completed via a personalised link and multiples who had completed via a generic link were handled separately. For more information on how business structure was used to inform weighting, see section 4.1.2.1.

##### 4.1.1.4 Survey responses

The survey was live from 3 February 2025 through to 21 March 2025, over which period 192 unique registered businesses completed the survey, representing an overall response rate of 7% from the GOC database of 2,910 registered businesses. The response rate amongst those identifying as independent practices was 9% (150 completes from 1,637 businesses), whereas the response rate for those identifying as multiples was 3% (42 completes from 1,273 businesses).

## 4.1.2 Interpreting the findings

### 4.1.2.1 Weighting

As the survey was completed by a sample of businesses and not the entire population of businesses registered with the GOC, weighting was applied to ensure that findings are as representative as possible of all businesses registered with the GOC. Due to unequal response rates between independent practices and multiples, as outlined in section 4.1.1.4, business structure was considered the most appropriate metric upon which to weight. As independent practices comprise around 56% of registered businesses in the GOC database but contributed to 78% of the sample in this research, they have been weighted down by a factor of 0.72, and the data of multiples has been weighted up by a factor of 2.00 as they comprise around 44% of the database but contributed to only 22% of the sample.

### 4.1.2.2 Sampling confidence interval

As the survey was completed by a sample of registered GOC businesses rather than the entire registered business population, all results are subject to sampling tolerances. The confidence interval for analysis indicates, for a given answer, what the range is that the results would be 95% likely to fall within if the result had been instead obtained from the entire population. Table 1 below shows a range of sampling tolerances according to the sample size for the question and the answer given for that question. For example, if a mean of 50% was acquired for a sample of  $n=200$ , the data is 95% likely to fall within the range of 43.1% to 56.9% ( $\pm 6.9\%$ ). As shown, the confidence interval (sampling error) increases for samples that are smaller or for answers closer to 50%.

**Table 1: Approximate sampling tolerances applicable to percentages at/near select levels, broken out by sample size (95% confidence interval)**

Size of sample	10% or 90% $\pm$	30% or 70% $\pm$	50%
250	3.7	5.7	6.2
200	4.2	6.4	6.9
150	4.8	7.3	8
100	5.9	9.0	9.8

Source: Impact Research Ltd.

### 4.1.2.3 Subgroup analysis

A combination of SPSS and Q Research software was used for data analysis. Q Research conducts several tests of statistical significance on tables, such as independent t-tests and Chi-square tests, and statistical differences between subgroups within the data have been reported where relevant. Multiple comparisons correction was applied where appropriate, and a p-value of 0.05 was used to test significance.

### 4.1.2.4 Presentation of the data

Many charts and data visualisations are found in this report. In some instances, responses may not total to 100%, which may be due to any of the following reasons:

- The chart may present only the most relevant data points from a question
- Surveyed businesses may have been allowed to give more than one answer for the question
- The rounding of figures.

All figures were rounded to the nearest whole number. Where figures of 0% are referenced in text and the figure has been rounded down to 0%, an n= figure has also been given to indicate the discrete number of business registrants that selected that option.

Where appropriate, significant differences between subgroups have been described in-text, supported by green or red arrows in the figures. Relevant subgroups used in analysis have also been stylised in **bold** to aid comprehensibility. In line with the 2024 report, a colour scheme has been implemented to help distinguish the independent practices and multiples groups. **Independent practices** have been described in **pink** and **multiples** in **blue**, both in the text and in figures relevant to the groups.

Registered businesses were also given several opportunities to provide open-ended responses at various points in the survey, which allowed them to enter text freely. For these questions, responses have been grouped in terms of common themes and described in text, alongside a description of how many businesses gave a response within that category (e.g., “singular mentions of”, or an n= figure). For open-ended questions which have been answered by 50 or more respondents, recurring answers are instead given as a percentage, with the base population described in text.

## 4.2 Questionnaire




### INTRODUCTION

Thank you for expressing interest in this survey

By clicking the [INSERT NEXT>>] button below, you confirm that you agree to participate in this survey. You can withdraw your consent at any time. [FOR UNIQUE LINKS: You may leave and return to the questions using the same link you used to enter this survey].

If you require any further information about how we store and use the data you provide, please see our privacy policy on our website: <https://www.impactmr.com/privacy-statement-research>

Alternatively, you can contact us or find out more about this study via any of the below:

 <a href="https://optical.org/">https://optical.org/</a>	 FROM INSIGHT TO INFLUENCE <a href="mailto:info@impacthealthmr.com">info@impacthealthmr.com</a> Impact Research Ltd, 3 The Quintet, Churchfield Road, Walton-on-Thames, Surrey, KT12 2TZ Office: +44 (0) 1932 226 793	 <a href="mailto:hello@potentia-insight.co.uk">hello@potentia-insight.co.uk</a> 0203 405 6459 Ext 106
	If you wish, you may also confirm our credentials you can email <a href="mailto:george.sheen@impacthealthmr.com">george.sheen@impacthealthmr.com</a> or by contacting the Market Research Society on 0800 975 9596	

<sup>1</sup> Prize Draw will be administrated by Impact Health and the winner selected and informed via email following the end of fieldwork period (expected in March 2025)

### SCREENER

We want to ensure those completing the study have the necessary seniority and access to information or knowledge about their business structure and operations to answer the questions sufficiently.

The next few questions are designed to determine your eligibility for this study.

If you feel there is somebody more suited and able to answer this survey before the deadline of 28<sup>th</sup> February 2025, you can forward this link [INSERT LINK] to a more appropriate colleague within your business at any time.

P/N: SEE CODE ABOVE QUESTION NUMBER FOR INPUT FORMAT. CODES CORRESPOND TO THE FOLLOWING:

S	SINGLE CODE
M	MULTICODE
N	NUMERIC CODE
OE	OPEN-END
GS	DISPLAY AS GRID – SINGLE CODE PER ROW



GM	DISPLAY AS GRID – MULTICODE PER ROW
GN	DISPLAY AS GRID – NUMERIC CODE PER ROW

**S ASK ALL**

**S1.** Is your business registered with the General Optical Council?

1. Yes **[CONTINUE]**
2. No **[SHOW “Unfortunately, we are only looking for opinions of those associated with businesses registered with the General Optical Council.” CLOSE BACK TO GOC WEBSITE AND RESET LINK BACK TO LANDING PAGE**

**S ASK ALL**

**S2.** What is your position in the business?

1. Owner **[CONTINUE]**
2. Practice manager or other senior manager **[CONTINUE]**
3. Other **[PLEASE SPECIFY] [CONTINUE]**

**S ASK IF CODE 3 @S2**

**S3.** Please confirm that you are authorised by the business owners or managers to complete the survey, and that you have access to information about your business’s structure and operations.

1. Yes **[CONTINUE]**
3. No **[SHOW “Unfortunately, we are looking for individuals that have the necessary authority and knowledge of their business’s structure and operations to answer the remaining questions. You may forward the email in which you received the survey link to a more appropriate person in the business.” CLOSE BACK TO GOC WEBSITE AND RESET LINK BACK TO LANDING PAGE**

**S ASK ALL**

**DP1.** On occasion, we may need to re-contact respondents to perform standard quality checks or ask for further information about the answers you have provided. Are you happy for us to contact the email address used for this survey to re-contact you for these purposes in the next 6 months?

1. Yes, to both verify data and recontact about information provided in this study
2. Yes, to verify data only
3. Yes, to recontact for further information about the answers provided in this study
4. No

**FOR UNIQUE LINKS AUTOCODE HIDDEN GOC NUMBER FROM DATABASE**

**SHOW “Thank you. As a reminder, for the rest of the study we would like you to answer the questions in reference to an individually owned business (for example, if you own a franchise, answer in relation to your franchise rather than the parent company).”**

**[FOR UNIQUE LINKS: You may leave the survey and return to your saved responses at any time before the close of fieldwork by using the same link you used to enter this survey.]**

**SECTION A – ABOUT YOUR BUSINESS**

The first section of the survey is designed to discover background information about your business. Please answer the following questions based on the business that you own or manage (for example, if you own a franchise, answer in relation to your franchise rather than the parent company).

**S ASK ALL**

**Q1.** How long ago was your business established?

1. Within the last 12 months
2. Over 1, up to 2 years ago
3. Over 2, up to 5 years ago
4. Over 5, up to 10 years ago
5. Over 10 years ago
6. Don't know **EXCLUSIVE CODE**

**GN ASK ALL**

**Q2.** How many people in total are currently employed in your business?

As a reminder, please answer the question based on the business that you own or manage (for example, if you own a franchise, answer in relation to your franchise rather than the parent company).

Category	Number
Optometrist	<<NUMBER ONLY>>
Dispensing optician	<<NUMBER ONLY>>
Contact lens optician	<<NUMBER ONLY>>
Optical assistant	<<NUMBER ONLY>>
Other	<<NUMBER ONLY>>
Total	<<AUTOMATED CALCULATION>>

IF NO NUMBER ENTERED, AUTOPUNCH '0' IN DATA. TOTAL MUST EQUAL MORE THAN ONE TO ALLOW CONTINUE

**S ASK ALL**

**Q3.** Which of the following best describes your business structure?

1. Independent practice
2. Joint venture partnership
3. Franchise
4. Regional provider
5. National provider

**S ASK ALL**

**Q4.** Which of the following best describes your ownership and management structure?

1. Owned and managed by GOC registered practitioner(s)
2. Owned by GOC registered practitioner(s) but managed by "lay" employee(s)
3. Owned by lay individual(s) but managed by GOC registered practitioner(s)
4. Owned and managed by "lay" individual(s)

**M ASK ALL**

**Q5.** Where does your business operate? *(please tick all that apply)*

1. England
2. Scotland
3. Wales
4. Northern Ireland
5. Outside of the UK

**M ASK ALL**

**Q6.** In which type of locations does your business serve patients? *(please tick all that apply)*

1. City
2. Town
3. Rural
4. Other (e.g. mobile)

**N** **ASK ALL**

**Q7.** How many practices/sites does your business currently operate?

RANGE FROM 1-999

**S** **ASK ALL**

**Q8.** Please indicate below the approximate turnover of your business in the most recent completed financial year. All figures below indicate yearly turnover in £.

*Note: Turnover refers to the market sales of goods and services, including all taxes except VAT.*

1. 0 - <50k
2. 50k - <100k
3. 100k - <250k
4. 250k - <500k
5. 500k - <1 million
6. 1 million - <2 million
7. 2 million - <5 million
8. 5 million - <10 million
9. 10 million - <50million
10. 50 million - <100million
11. 100 million+

## SECTION B - SERVICES

**GS** **ASK ALL**

**Q10.** Which of the following services does your business currently provide, or plan to offer in the future? *(please answer for all services)*

Service <b>ROTATE CODES BELOW</b>	Offer currently	Plan to offer in next two years	No plans to offer this service
Sight testing / eye examinations	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Sale of prescription spectacles	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Fitting and sale of contact lenses	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Sale of zero-powered contact lenses	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Domiciliary	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Paediatric excluding myopia control	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Paediatric including myopia control	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Orthoptics	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Dry eye	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Low vision	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Visual stress / colorimetry	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Independent prescribing	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Treatment of minor eye conditions	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Acute/emergency eye care	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Diabetic screening	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Myopia management	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Glaucoma monitoring	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Pre- and post-operative cataract	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Laser eye surgery	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

**S ASK ALL**

**Q11.** Does your business hold a contract with NHS England and/or is it on a health board ophthalmic list (in Wales, Scotland or Northern Ireland)?

1. Yes
2. No

**S ASK ALL**

**QW2-11a.** Thinking about the next 12 months, does your business intend to continue to hold a contract with NHS England and/or a health board ophthalmic list (in Wales, Scotland or Northern Ireland)?

1. Yes
2. No
3. Not sure

**S ASK ALL**

**Q12.** Thinking about the last 12 months, approximately what percentage of sight tests / eye examinations carried out by your business were NHS-funded?

1. None – fully private
2. 1-10%
3. 11-20%
4. 21-30%
5. 31-40%
6. 41-50%
7. 51-60%
8. 61-70%
9. 71-80%
10. 81-90%
11. 91-100%
12. Don't know

**S ASK ALL**

**QW2-12a.** Would it be helpful to be able to take a deposit prior to a sight test / eye examination?

1. Yes
2. No
3. Don't know

## SECTION C – INNOVATION AND TECHNOLOGY

**S ASK ALL**

**Q13.** Over the last three years, have you introduced any new or significantly improved clinical services to patients?

1. Yes (Please specify) \_\_\_\_\_
2. No

*IF YES @Q13 FORCE AT LEAST 3 CHARACTERS FOR OTHER SPECIFY*

**M ASK IF YES @ Q13**

**Q14.** Thinking again about the new service development activity that you've undertaken, were any of these services... *(please tick all that apply)*

1. New to the market (i.e., you introduced them before other businesses)?
2. Only new to your business (i.e., new services that were essentially the same as a service already available from other businesses)?

**M ASK IF YES @ Q13**

**Q15.** What have been the benefits of this new service development activity? *(please tick as many that apply)*

**ROTATE ATTRIBUTES WHILE KEEPING OTHER ANCHORED LAST**

1. Extended the range of services you offer
2. Improved the speed of delivery of your services
3. Increased value added *(this refers to increasing the difference between the price of a product or service and the cost of producing it)*
4. Reduced costs
5. Improved the quality of the services you offer
6. Attracted new patients
7. Increased revenue from existing patients
8. Increased market share
9. Reduced environmental impacts
10. Replaced outdated services or processes
11. Improved health and safety
12. Met regulatory requirements
13. Faster referrals
14. Better communications IT links with ophthalmology and GPs
15. Other (please specify) \_\_\_\_\_ **ANCHORED, IF SELECTED FORCE TEXT INPUT**

**GS ASK IF YES @ Q13 – USE SLIDER SCALE FOR DATA ENTRY**

**Q16.** Again, thinking about the last three years, how important were each of the following factors in your decision to innovate?

<<ROTATE ORDER, OTHER ALWAYS LAST>>	Not important	Low importance	Medium importance	High importance
Patient demand for new services				
Improving customer experience				
Changes in NHS or government commissioning of optical services				
Intensity of competition				
Availability of finance				
Cost of finance				
Recruitment of new staff or talent				
The availability of new technology				
Government regulations				
GOC regulations				
EU regulations				
Withdrawal of UK from the EU				
Issues relating to the COVID-19 pandemic				

OTHER (PLEASE SPECIFY) _____				
------------------------------	--	--	--	--

**GS ASK ALL – USE SLIDER SCALE FOR DATA ENTRY**

**Q17.** Below is a list of possible barriers that may have constrained your new service development over the last three years. How important were the following factors in constraining innovation activities?

<<ROTATE ORDER, OTHER ALWAYS LAST>>	Not important	Low importance	Medium importance	High importance
Conditions in the UK economy				
Direct innovation costs too high				
Cost of finance				
Availability of finance				
Lack of qualified personnel				
Lack of information on technology				
Lack of information on markets				
Perceived uncertain demand for innovative services				
Lack of NHS IT connectivity to ophthalmology				
GOC regulations				
Government regulations				
EU regulations				
Withdrawal of UK from the EU				
Issues related to the COVID-19 pandemic				
Other (PLEASE SPECIFY) _____				

**S ASK ALL**

**Q18.** Does your business have a website?

1. Yes
2. No

**S ASK IF YES @ Q18**

**Q19.** Does your business publish the price of a sight test/eye examination on its website?

1. Yes
2. No

**GS ASK ALL**

**Q21.** Does your business use, or plan to use in the next two years, the following types of technology?

Type of technology <<ENSURE RESPONSE FOR EACH ROW>> <<ROTATE FACTORS BELOW>>	Use now	Plan to use in next two years	No current plans to use
Autorefractor	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
OCT	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
OptoMap	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Artificial intelligence (AI)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
A website with interactive features such as online booking	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
LiveChat or virtual assistants on your website	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Remote sight testing	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
PMS/electronic patient records	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Fundus camera	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Online sales (e.g. spectacles, contact lenses)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Other (please specify)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

## SECTION D – OPTICAL STUDENTS AND NEWLY QUALIFIED PROFESSIONALS

**SHOW** "As a reminder, please answer the question based on the business that you own or manage (for example, if you own a franchise, answer in relation to your franchise rather than the parent company). "

### S ASK ALL

**Q22.** Does your business currently have arrangements with universities or The College of Optometrists to offer placements to optical students during their studies?

1. Yes
2. No

### S ASK IF YES @ Q22

**Q23a.** Are the placements for...?

1. Student optometrists only
2. Student dispensing opticians only
3. Both of the above

### S ASK IF YES @ Q22

**Q23b.** Are the number of placements decreasing, staying the same, or increasing overall vs. previous years?

1. Decreasing
2. Staying the same
3. Increasing
4. Don't know

### S ASK IF NO @ Q22

**Q24.** Do you plan to offer placements to optical students within the next two years?

1. Yes
2. No

### GS ASK ALL – USE SLIDER SCALE PER ROW

**Q25.** What do you see as the main benefits of offering placements to optical students?

<<ROTATE FACTORS, OTHER ALWAYS LAST>> <<ENSURE RESPONSE FOR EACH ROW>>	Not a benefit	Minor benefit	Major benefit
Providing a pipeline of newly qualified optical professionals to employ in future			
Supporting the next generation of optical professionals			
Access to workforce at lower cost			
Benefits to fully qualified employees			
Other (PLEASE SPECIFY) _____			

### GS ASK ALL – USE SLIDER SCALE

**Q26.** What do you see as the main barriers to offering placements to optical students?

<<ROTATE FACTORS, OTHER ALWAYS LAST>> <<ENSURE RESPONSE FOR EACH ROW>>	Not a barrier	Minor barrier	Major barrier
Financial factors			
Time constraints			
No education provider in my area			
No available consulting room			

Lack of supervisors			
Regulatory burden			
Lack of clarity about GOC requirements			
Bureaucracy by education providers			
Lack of knowledge of what is involved			
Students not being willing or able to travel to the practice			
Other (PLEASE SPECIFY) _____			

## SECTION E – OPERATING CONDITIONS

**SHOW** "As a reminder, please answer the questions based on the business that you own or manage (for example, if you own a franchise, answer in relation to your franchise rather than the parent company). "

### S ASK ALL

**Q34.** Reflecting on the last 12 months, which of the following best describes how your business has performed overall?

1. Declining
2. Stable
3. Growing

### S ASK ALL

**Q36.** Thinking about the next 12 months, what is the outlook for your business?

1. Declining
2. Stable
3. Growing
4. Expect to close
5. Expect to be sold/merged with another business

### GS ASK ALL – USE SLIDER SCALE PER ROW

**Q37.** Please rate the following challenges that might be facing your business.

<<ROTATE FACTORS BELOW, OTHER ALWAYS LAST>>	Not at all challenging	A little challenging	Quite challenging	Very Challenging
Rising costs for my business due to economic conditions				
Impacts of cost-of-living crisis on patients				
Welfare of employees				
Brexit and its implications				
COVID-19 and its impacts				
Increasing wage pressures				
Government funding of sight tests				
Retaining patients				
Keeping up with changes in technology				
Meeting compliance requirements				
Competition from online businesses				
Demand outstripping capacity to deliver				
Other (PLEASE SPECIFY) _____				

### GS ASK ALL – USE SLIDER SCALE PER ROW

**QW2-37a.** Reflecting on the last 12 months, how challenging has it been for your business to recruit staff?



KEEP QUESTIONNAIRE ORDER	1 Not at all challenging	2 A little challenging	3 Quite challenging	4 Very Challenging
Optometrists				
Dispensing opticians				
Other staff				

**ASK IF CODES 2-4 @QW2-37a YES TO ANY TYPES OF STAFF AT PREVIOUS QUESTION**

**QW2-37b.** Reflecting on the last 12 months, what were the reasons for not being able to recruit staff?

(please tick as many that apply)

**ROTATE FACTORS**

Not able to compete on salary and benefits	<input type="checkbox"/>
Expectations of the job (e.g. weekend working, low salary)	<input type="checkbox"/>
Competition from other businesses	<input type="checkbox"/>
Shortage of professionals in my area	<input type="checkbox"/>
Don't want to work in the location	<input type="checkbox"/>
Preference for part-time working	<input type="checkbox"/>
Preference for locum working	<input type="checkbox"/>
Variety of services offered not wide enough	<input type="checkbox"/>
Other (please specify) <b>ANCHORED, IF SELECTED FORCE TEXT INPUT</b>	<input type="checkbox"/>

**GS ASK ALL – USE SLIDER SCALE, KEEP DON'T KNOW AS EXCLUSIVE TICK BOX**

**Q38.** Please indicate the extent to which you agree or disagree that...

<<ROTATE STATEMENTS>> <<ENSURE RESPONSE FOR EACH ROW>>	Strongly disagree	Disagree	Neither agree nor disagree	Agree	Strongly agree	Don't Know
I am optimistic about the future of primary eye care						
I am optimistic about the future of my business						
There are rough times ahead for optical businesses in general						

**S ASK ALL**

**Q39.** To what extent has your business used locums in the last 12 months?

1. Never
2. Occasionally
3. Sometimes
4. Most of the time
5. All the time or nearly all the time

**S ASK IF 2-5 SELECTED @ Q39**

**Q40.** Which of the following best represents the reasons why you use locums?

1. We use locums as a positive choice that fits our business model
2. We are forced to use locums due to difficulties recruiting/retaining permanent staff
3. Other PLEASE SPECIFY \_\_\_\_\_

**SECTION F – PERCEPTIONS OF REGULATION**

**S ASK ALL, USE SLIDER SCALE, KEEP DON'T KNOW AS EXCLUSIVE TICK BOX**

**Q41.** Please indicate to what extent you agree or disagree that the GOC business registrant registration fees are reasonable.

Strongly disagree	Disagree	Neither agree nor disagree	Agree	Strongly agree	Don't Know
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**OE** **ASK IF DISAGREE OR DISAGREE STRONGLY @Q41**

**QW2-41a.** Please explain why you **[INSERT CODE @Q41]** that the GOC business registrant registration fees are reasonable.

**S** **ASK ALL**

**QW2-41b.** Do you wish to be able to pay GOC business registration fees in installments throughout the year?

1. Yes
2. No
3. Not sure

**S** **ASK ALL**

**QW2-41c.** Does your business pay the individual registration fee on behalf of its registrant employees?

1. Yes for optometrists
2. Yes for dispensing opticians
3. Yes for both optometrists and dispensing opticians
4. No
5. Not sure

**S** **ASK ALL, USE SLIDER SCALE, KEEP DON'T KNOW AS EXCLUSIVE TICK BOX**

**Q42.** Please indicate to what extent you agree or disagree that the annual compliance costs your business faces are reasonable.

Strongly Disagree	Disagree	Neither agree nor disagree	Agree	Strongly agree	Don't Know
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**ASK ALL**

**QW2-42a.** What do you consider to be the benefits of GOC regulation for your business?

(please tick all that apply)

**ROTATE CODES KEEP OTHER LAST**

It gives patients confidence in our business	<input type="checkbox"/>
It gives patients confidence to pay for eye care services	<input type="checkbox"/>
It supports appropriate standards of behaviour and performance by registrant employees	<input type="checkbox"/>
It provides a stable environment that encourages investment	<input type="checkbox"/>
It ensures that only businesses that are fit to carry on business are allowed to operate	<input type="checkbox"/>
It increases safety for optical patients and members of the public	<input type="checkbox"/>
It promotes fair competition	<input type="checkbox"/>
It encourages innovation	<input type="checkbox"/>
It enables us to deliver more enhanced clinical services	<input type="checkbox"/>
There are no benefits <b>[EXCLUSIVE]</b>	<input type="radio"/>
Other (please specify) <b>ANCHORED, IF SELECTED FORCE TEXT INPUT</b>	<input type="checkbox"/>

**S** **ASK ALL, USE SLIDER SCALE, KEEP DON'T KNOW AS EXCLUSIVE TICK BOX**

**QW2-42b.** Please indicate to what extent you agree or disagree with the GOC's position that all optical businesses providing particular restricted functions should be regulated by the GOC?

(NB The restricted functions are: sight testing; contact lens fitting; supply of prescription and zero powered cosmetic contact lenses; and spectacle sales to the under 16s and those who are registered sight impaired or severely sight impaired.)

Strongly Disagree	Disagree	Neither agree nor disagree	Agree	Strongly agree	Don't Know
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**GS ASK ALL, USE SLIDER SCALE, KEEP DON'T KNOW AS EXCLUSIVE TICK BOX**

**Q43.** Please indicate to what extent you agree or disagree that the cost of ongoing compliance for the following types of regulation is reasonable:

<<ROTATE STATEMENTS>> <<ENSURE RESPONSE FOR EACH ROW>>	Strongly disagree	Disagree	Neither agree nor disagree	Agree	Strongly agree	Don't Know
Information requests from the GOC						
Keeping up to date with changes in government legislation						
Keeping up to date with changes in GOC regulation						
NHS commissioning requirements						
Safeguarding requirements						
Health and safety						
Equalities legislation						
Environmental or sustainability laws/regulations/standards						
Information you are required to provide to patients						
Maintaining patient records						
Data protection requirements						
Handling patient complaints						
Professional indemnity insurance						
CPD undertaken by employees						

**GS ASK ALL, USE SLIDER SCALE, KEEP DON'T KNOW AS EXCLUSIVE TICK BOX**

**Q46.** Please indicate the extent to which you agree or disagree that...

<<ROTATE STATEMENTS>> <<ENSURE RESPONSE FOR EACH ROW>>	Strongly disagree	Disagree	Neither agree nor disagree	Agree	Strongly agree	Don't Know
I find the GOC's standards for optical businesses easy to understand						
I find the GOC's standards for optical businesses easy to comply with						
The GOC's standards for optical businesses help						

to ensure the quality of patient care						
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## SECTION G – CPD AND WORKPLACE CULTURE

### ASK ALL

**QW2-47.** In what ways, if any, does your business support its registrant employees to complete their continuing professional development (CPD) requirements?

(Please tick all that apply.)

### ROTATE CODES

We provide time off for completing CPD	<input type="checkbox"/>
We provide funding for completing CPD	<input type="checkbox"/>
We provide our own CPD at a charge	<input type="checkbox"/>
We provide our own CPD free of charge	<input type="checkbox"/>
We provide CPD free of charge through third party providers	<input type="checkbox"/>
Other – please specify <b>ANCHORED, IF SELECTED FORCE TEXT INPUT</b>	<input type="checkbox"/>
We don't provide any support <b>[EXCLUSIVE]</b>	<input type="radio"/>

### ASK ALL

**QW2-48.** In what ways, if any, does your business monitor whether its registrant employees are complying with their CPD requirements?

(Please tick all that apply.)

### ROTATE CODES

We provide reminders of CPD requirements through communications	<input type="checkbox"/>
We carry out regular checks on progress against points requirements	<input type="checkbox"/>
We check whether a personal development plan (PDP) is in place	<input type="checkbox"/>
We check whether the reflective exercise has been completed	<input type="checkbox"/>
Other – please specify <b>ANCHORED, IF SELECTED FORCE TEXT INPUT</b>	<input type="checkbox"/>
We don't monitor compliance <b>[EXCLUSIVE]</b>	<input type="radio"/>

### ASK ALL

**QW2-49.** What support mechanisms, if any, do you have in place for staff facing issues such as bullying, harassment, abuse or discrimination?

(Please tick all that apply.)

### ROTATE CODES

We have signage for patients explaining that bullying/harassment/abuse/discrimination is not tolerated	<input type="checkbox"/>
We have a policy in place with guidance for what to do if staff experience issues	<input type="checkbox"/>
We have a speaking up guardian in place	<input type="checkbox"/>
We have a confidential staff helpline	<input type="checkbox"/>
We have mental health first aiders (or a similar role)	<input type="checkbox"/>
We provide training on equality, diversity and inclusion (EDI)	<input type="checkbox"/>
We provide training on how to recognise and address bullying, harassment, abuse or discrimination	<input type="checkbox"/>
We have an acceptable behaviour policy	<input type="checkbox"/>
We have guidance and/or provide training on how to deal with difficult/abusive customers	<input type="checkbox"/>
Other – please specify <b>ANCHORED, IF SELECTED FORCE TEXT INPUT</b>	<input type="checkbox"/>
We don't have any support mechanisms in place <b>[EXCLUSIVE]</b>	<input type="radio"/>

## CLOSING SECTION

### Collect details for price draw

**G1.** Please indicate if you would like to be entered in the price draw to win one of five £50 Amazon e-gift vouchers.

I would like to be included in the free prize draw to win a £50 Amazon e-gift voucher	<input type="radio"/>
I DO NOT wish to be included in the free prize draw	<input type="radio"/>

### IF WOULD LIKE TO BE INCLUDED ASK CODE 1@G1:

Please indicate the best email address to contact you on to send the e-gift voucher if you win the free prize draw.

Email address	
Confirm email address	

**ENSURE EMAIL ADDRESS CONFORMS TO STANDARD MAIL ADDRESS AND THAT SAME EMAIL IS IN BOTH FIELDS; OTHERWISE, SHOW ERROR**

Thank you very much for your help today. We are very interested in hearing your views on our survey design.

### GS ASK ALL, USE SLIDER SCALE

**Z1.** Using the rating below, please let us know how you would rate each of the following:

	1 Very Bad	2	3	4	5 Very Good
Length of survey					
Ease of completion					
Ability to express my true opinion					
Overall experience					

### S ASK ALL

**Z2.** Have you experienced any *technical difficulties* while taking the survey?

1. No
2. Yes (Please specify)

### OE ASK ALL

**Z3.** If you have any additional feedback, please enter your comments here:

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### CLOSING INFO COMPLETES

Thank you, you have reached the end of this questionnaire, your feedback has been greatly appreciated! <<RETURN BROWSER TO GOC WEB HOME PAGE>>