

# Optical Sector Survey Report



**3 July 2018**

## Optical Sector Survey

### Executive Summary

Having reviewed data on the optics workforce in Ireland based on the Optical Registration Board's register of optometrists and dispensing opticians, the FODO Ireland executive decided that further information was needed in order to gain greater insight into how optics professionals in Ireland work, where they trained, and their future career intentions, including any plans to leave the workforce. To this end, it was determined that a survey of the Irish optical sector should be conducted. It is hoped that the results will help to assist members in workforce planning and inform any future discussions with government officials when representing member interests.

It was determined that a questionnaire distributed through SurveyMonkey, would be the most effective way of surveying the sector. The questionnaire was open for responses from 14 March to 12 April 2018 and received 125 responses, which included 38 students, 69 optometrists and 18 dispensing opticians. This equates to 8.66% and 10.17% respectively of the registered optometrists and dispensing opticians in Ireland.

Some of the key results from the questionnaire include:

- A heavier bias towards the younger section of the profession in those who responded to the survey (only 18.9% were aged over 50, compared with 24% over 50 according to the data we received from CORU).
- 65.52% of the professional respondents were female (this proportion was higher again amongst the students – 76.32%).
- 46.51% reported that they obtained their qualification in the UK – which emphasises how reliant the Irish optical sector has been on UK universities.
- Of the 87 professionals who responded, 22.62% intend to take break from the optical sector in the next 5 years.
  - Of these, 61.54% will be taking parental leave, 23.08% will be seeking a career change and 15.38% will be retiring.
- 15.12% are currently working part time, of those who work part-time they work an average of 24 contracted hours per week.
- A large majority would like to make more use of the full range of their skills – 83% of the optometrists and 88% of the dispensing opticians.
- A high proportion of students, 82.35%, saw their chances of gaining employment in the first 12 months after they graduate as being very high; this reflects the current demand in Ireland for trained optics professionals and low supply of local graduates.

Recommendations based on the results of this questionnaire include:

1. That the current funding arrangements for optometry degrees be amended so that universities do not run these programs at loss.

2. That consideration be given to supporting a second university in Ireland to provide an optometry degree.
3. That the HSE make more use of the full scope of practice for optometrists and dispensing opticians by contracting additional services to community optical practices.
4. That employers in the optical sector implement more flexible working arrangements to adapt to and retain more of what is becoming a more female orientated workforce.
5. That training or CPD courses be developed to assist optometrists and dispensing opticians to adapt to technological changes in the optical sector.
6. That FODO Ireland consider introducing an *available jobs* section to its new website.

## Methodology

It was determined that a questionnaire distributed through the online survey platform SurveyMonkey (<https://www.surveymonkey.com>) would be the most effective way of reaching as many respondents as possible in the most timely way. A paper based questionnaire would have been much more time consuming and resource intensive, requiring printing, both in and outbound postage, increased collection time, data input and analysis, and ultimately would have most likely seen a lower response rate.

Questions for the questionnaire were developed by FODO Ireland staff in consultation with the FODO Ireland Executive. All questions from the questionnaire can be found at appendix A.

It was determined that the survey should also be expanded to include current optics students, having gained agreement from the Head of School at the Dublin Institute of Technology (DIT), Prof Declan Hovenden, student specific questions were developed to compliment those already in place for practicing professionals.

Testing of the questionnaire took place with FODO staff, in order to identify any errors or logic issues. The questionnaire was distributed to all FODO Ireland members and a link to the questionnaire on *SurveyMonkey* was also posted on the FODO Ireland Twitter page. Regular reminder messages were sent to FODO Ireland members by email and through the Twitter account. A link to the questionnaire was sent to Prof Hovenden, who distributed it to all optometry and dispensing optics students at DIT. The questionnaire was open for responses from 14 March to 12 April 2018. The questionnaire was completely anonymous, with no identifying information from any of the respondents being recorded.

Quantitative analysis for the multiple choice questions was conducted automatically by SurveyMonkey. Analysis of the responses to the open ended questions was conducted by performing an initial review of responses, then composing a several categories based on this review, the responses were then reviewed again and categorised in Microsoft Excel. This allowed for any common themes amongst the responses to be more easily ascertained. The report was authored by FODO Ireland Senior Policy Officer Peter Fogarty.

## Results

The questionnaire received 125 responses, which included 38 students, 69 optometrists and 18 dispensing opticians.

This compares with current CORU figures for the national register, which state that there are 797 registered optometrists and 177 dispensing opticians. Therefore the questionnaire received responses from 8.66% and 10.17% respectively for the total population of optometrists and dispensing opticians in Ireland.

For the purposes of this report the responses from practicing optometrists and dispensing opticians will be grouped together under the title 'professionals'.

## Professionals

In question 1, respondents were asked to identify which age group they belong to (see figure 1 below), there was a spread amongst the age groups for the professional respondents, with the most responses received for the 30 to 39 year old age group, with 18.39% of respondents aged over 50.

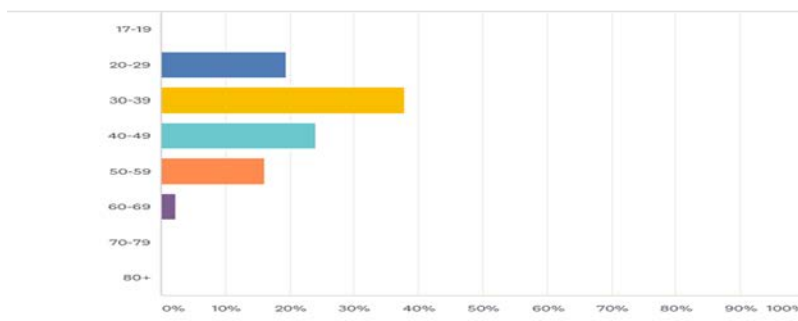


Figure 1: responses to Question 1 Which of the following age groups do you belong to?

Of the 87 responses received from practicing optical professionals 65.52% were female, 29.89% were male and 4.6% selected the *prefer not to say* option; this is illustrated below in figure 2.

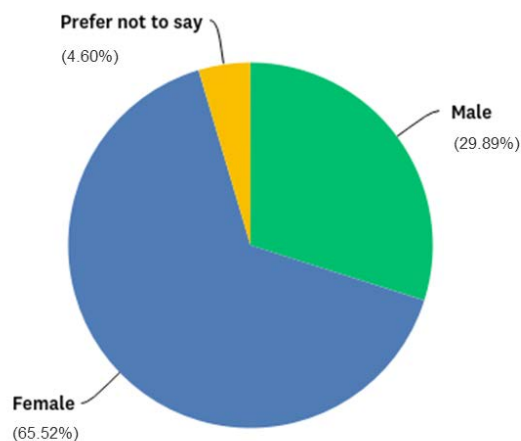


Figure 2: responses to Question 2 – What is your gender?

Of the optical professionals that responded the vast majority were optometrists (79.31%), compared to just 20.69% being dispensing opticians.

With regard to the location of their training, just over half of the respondents (52.33%), obtained their qualification in the Republic of Ireland, where as 46.51% of respondents reported that they obtained their qualification in the United Kingdom, with only one respondent to the questionnaire having trained elsewhere; this individual obtained their qualification in Spain.

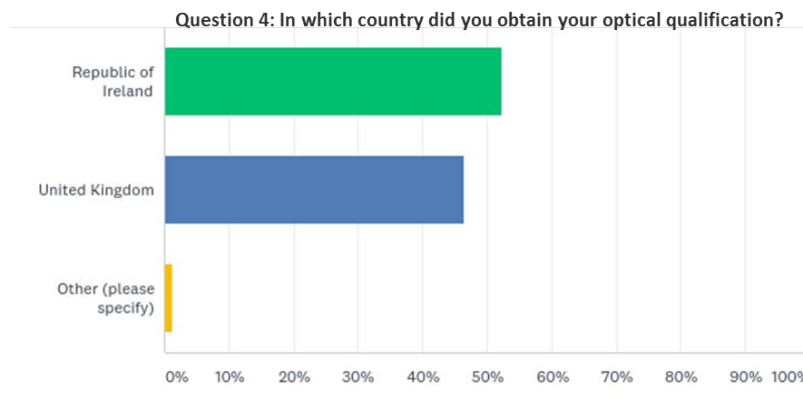


Figure 3: responses to Question 4

The vast majority of respondents to the questionnaire worked on a full time basis, with 84.88% selecting this option on question 5. The percentage of those working part time was higher amongst female respondents, with 17.54% working part time, compared to 3.85% of male respondents. For those that indicated that they work part time, on average they are contracted to work 24 hours per week.

The majority of optical professionals who responded to the questionnaire, 73.26%, work at just the one practice, with 20.93% working at two practices and 5.81% working at three or more locations.

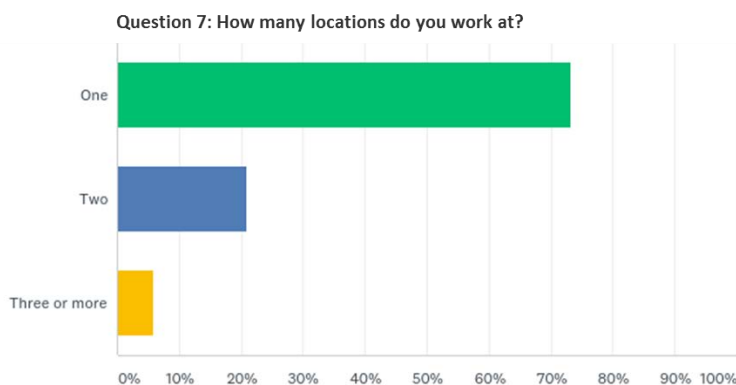


Figure 4: responses to Question 7

The majority of respondents to the questions for professionals did not identify as being practice owners, with just 34.88% stating that they own a practice. Of those who did own their practice, the largest proportion (86.67%), were in a franchise/joint venture arrangement. For those that did not identify as practice owners, 66.07% said that the main practice they



worked at was a franchise/joint venture, with 26.79% working at a multiple chain, and 7.14% working at independent practices; these figures are by-in-large reflective of the FODO Ireland membership. 65.12% of the survey respondents are not currently practice owners; the proportion of practice ownership was lower amongst the female respondents, with only 26.32% owning their practice. However, as displayed below in figure 5, of those respondents that are not practice owners, 39.29% said they would like to become practice owners in the future. When split by gender, 38.10% of female respondents and 45.45% of male respondents would like to become practice owners in the future.

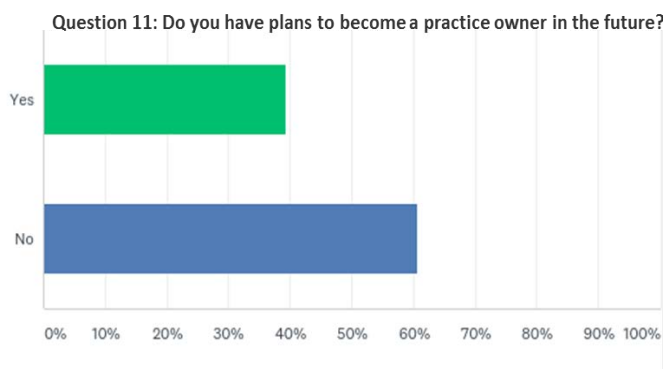


Figure 5: responses to Question 11

A large majority of the optometrists surveyed are keen to expand the range of skills that they regularly use; with 83% of optometrists who responded to the questionnaire indicating that they would like to make more use of the full range of their clinical skills. Similarly a large proportion of dispensing opticians would like to provide a wider range of services, with 88.88% of dispensing opticians answering yes when asked if they wanted to make more use of the full range of their skills.

The optometrists who said they wanted to make more use of their skills identified areas including AMD and glaucoma management, independent prescribing, treatment of conjunctivitis and other eye infections, red eye management, diabetic retinopathy, primary care management, pre and post-operative cataract care, and paediatric testing as areas to which they would like to expand their practice to.

When asked in question 16 if there is anything that would help them to make greater use of their full range of skills, optometrists identified being more involved in community care, more availability of further education and refresher courses in Ireland, in practice flexibility to allow for the length of time needed with more complex patients, change on behalf the HSE to allow extended services and a restructure of fees to recognise time taken with patients. Other changes mentioned included the need for greater public awareness, support from the ophthalmological community and eye hospital services, better referral systems, increased prescribing rights, and greater recognition of the cost effectiveness of optometry to HSE.

Dispensing opticians who said they wanted to make more use of their skills identified areas including low vision services, the treatment of minor eye conditions, paediatric dispensing and care for elderly patients. Of these respondents, availability of further education and training in Ireland, and greater recognition of the dispensing optician's role were seen as factors that would assist making greater use of these skills.

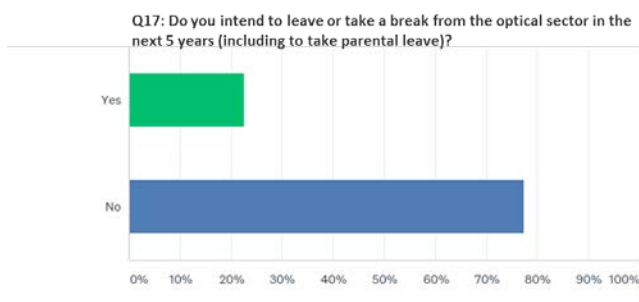


Figure 6: responses to Question 17

In terms of future career intentions, in question 17, 22.62% said that they intend to take a break from the optical sector in the next 5 years (see figure 6 above). Of those who intend to take a break from the sector, 61.54% will be taking parental leave, 23.08% will be seeking a career change and 15.38% will be retiring (see figure 7 below). The majority, 66.67%, of those that said they will take a break from the sector, intend to be away from the sector for 6-18 months.

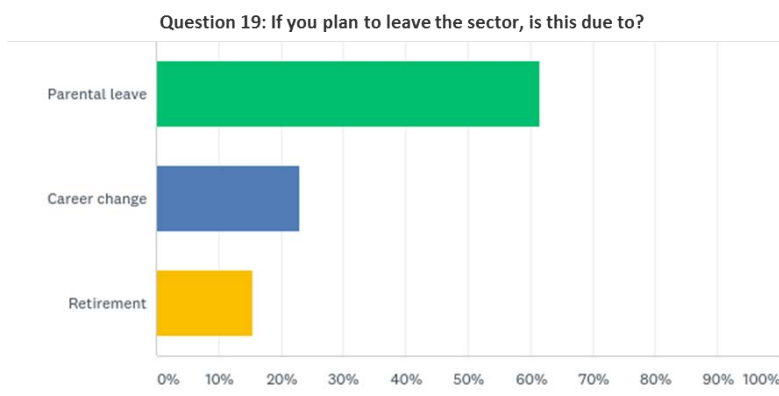


Figure 7: responses to Question 19

When the respondents who said they planned to take parental leave were asked in question 20 what would assist them in returning to the workforce sooner, responses either identified more flexible working arrangements or the need for childcare support.

When asked in question 27 what about they saw as the main challenges for optical professionals and the wider optical sector over the next 5-10 years, a significant contingent of the professional respondents (40.23%), saw online sales and changes in technology as being the main challenges for the sector. Workforce supply (i.e. the availability of graduates) was raised by 21.84% of respondents as the main challenge for the sector. Some of those who saw changing technology as a challenge also recognised it as an opportunity to recast their roles and take on more advanced services.

Others mentioned the relationship of optics with the ophthalmology profession, both in terms of wanting to work more constructively with them, and being seen to be limiting the role of optometrists. Over 10% raised issues around wanting to use more of the full range of their skills. Concerns were also raised by some respondents in terms of legal issues, more specifically greater requirements due to GDPR changes, compliance with CORU's code of

conduct and fear of potential litigation. Some respondents raised competition from low cost competitors and large chains as a concern, though all of these respondents identified as working in a franchise/joint venture practice. Others saw the ageing population and how to meet this demand, issues with referrals for patients and the fees paid for services provided as the main challenges for the sector.

**Students**

38 Students responded to the questionnaire, of these 28.95% were in the 17 to 19 year old age group, 68.42% in the 20 to 29 year old group and 2.63% in the 30 to 39 year old age group. As displayed below in figure 8 the majority of the students were female (76.32%), with only 23.68% of the student respondents being male.

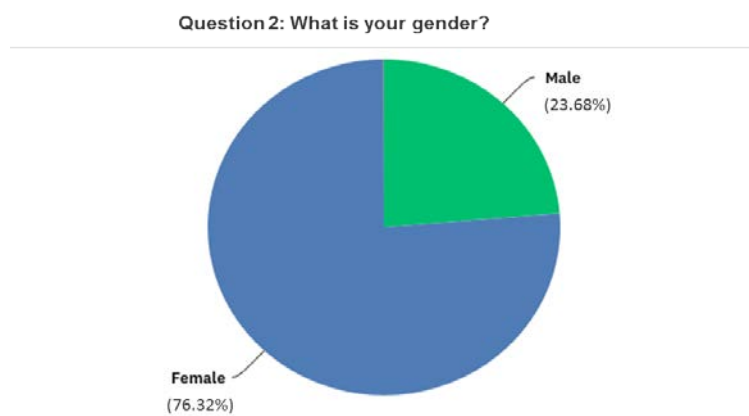


Figure 8: Student responses to Question 2

The overwhelming majority of students who responded to the questionnaire were studying towards a Bachelor of Science in Optometry (89.19%), with just 10.81% of responses came from students studying towards the Bachelor of Science in Ophthalmic Dispensing.

As shown below in figures 9 and 10, most students, 83.78%, also held part time jobs in addition to their studies, of those with part time jobs, 61.11% are working in an optical practice.

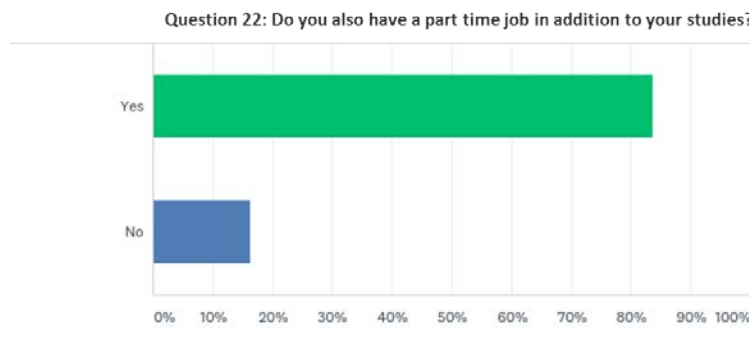


Figure 9: responses to Question 22



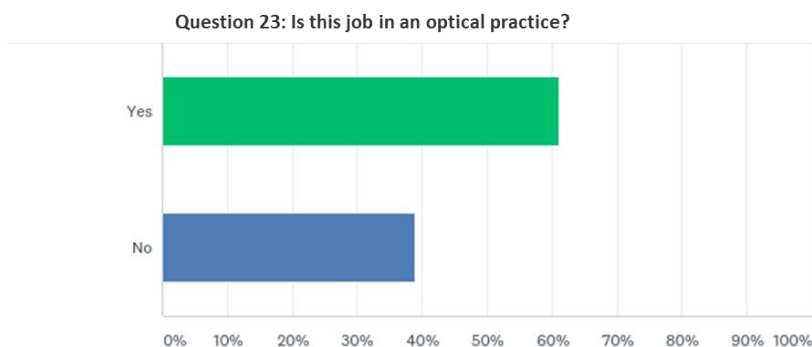


Figure 10: responses to Question 23

Question 24 asked the students: *Do you intend to work as an optometrist or dispensing optician in the Irish optics sector after you graduate?* 89.19% answered yes to this question. Of those who said no to this question, all indicated that they intend to move overseas after completing their studies.

The students were asked in question 26 to rate their chances of gaining employment in the optical sector in the first 12 months after they graduated. Most, 82.35% saw their chances as being very good, 11.76% saw their chances as good and the remaining 5.88% were unsure; none of the students responded poor or very poor.

In question 27 students were asked *what do you see as being the main challenges to you gaining employment in the Irish optics sector after you graduate?* The most common response was that they saw no or minimal barriers due to the high demand for optical professionals, the next most common issue raised was concern about their own lack of experience, others raised passing the professional qualifying exams (PQEs) as their biggest challenge.

In question 28 the students were asked about issues they felt they needed further information on to assist their entry to the workforce. The most common issues raised were wanting more information on what jobs are available and what salaries they are entitled to once they commence work. The next most common issue raised was around students wanting more practical and day to day business skills for the reality of working in an optical practice. Again PQEs were also raised by some of the students as an issue that they would like more information on.

Question 29 asked the students: *Are there any measures that would assist you in finding employment in the Irish optics sector after you graduate?* The largest group of responses to this question centred around having a website, or further information on jobs that are available in the optical sector in Ireland. The other common response to this question, was from students who felt they needed more practical experience.

Students were asked in question 30: *What factors would make a potential employer more attractive to you?* The two most commonly raised factors were that a prospective employer is in an attractive location and wanting to be able to work in an environment that put a greater focus on clinical care for patients. Many mentioned having a good rapport and understanding in place with their manager/ practice owner. Others raised a desire for more attractive and flexible working hours. Some responses indicated they wanted to work in supportive

environments with the scope for professional development. A small proportion raised remuneration and working conditions as issues they would consider.

As with the professionals, the students were also asked what they saw as the main challenges for optical professionals and the wider optical sector over the next 5-10 years. The most common issue, raised by 34.2% of the students related to advances in technology and online sales; some who raised this, also raised the need for ongoing training and education in order to adapt to the new technology. The other challenge that was raised by many of the students was being able to make use of the full range of their skills in areas such as prescribing.

## Discussion

One of the key results that came out of the survey, is the current reliance in Ireland on the UK for the training of optics professionals, with over 46% of the currently practising professionals who responded to the questionnaire having obtained their qualification in the UK (question 4). This raises obvious concerns for the sustainability of the Irish optical sector given the uncertainty created by the UK's exit from the European Union. Data from CORU's register shows that a large proportion of optometrists in Ireland are nearing retirement, with 24% aged 50 or older. Question 17 also showed that over 22% of the current workforce intend to take a break from their careers in the next 5 years. These factors emphasise the importance of considering strategies to increase the number of locally trained optical professionals. The current funding arrangements for the optometry degree at DIT sees it funded as a science degree, rather than at the higher rate of a clinical degree which the program has the associated costs of. This is known to be a strong disincentive both for DIT to take on more students and for other universities to establish an optometry program. Support may need to be provided to assist a second Irish university to establish an optometry program. In the short term Irish optical practices may need to consider recruiting optometrists from other nations that have a similar scope of practice.

Positively, it seems a large majority of the profession are keen to expand the range of skills that they regularly use; with 83% of optometrists and 88.88% of dispensing opticians expressing a desire to be able to use more of their skills. This shows that any potential move to contract more services to community optical practices would be welcome by the profession. There are currently lengthy waiting lists across Ireland for patients to access publicly funded eye care services; these waiting lists could be significantly reduced if more services were to be provided in community practices by optometrists, rather than the lengthy and unnecessary wait that many patients face to see an ophthalmologist.

The responses to the questionnaire highlighted the high female representation in the optics workforce, with this representation only due to grow in the future, with an even higher proportion of students being female. In this context, optics employers will need to consider strategies to encourage more of those who choose to take parental leave, to return to work as soon as possible and avoid permanently losing these trained professionals. Options such as being more open to optometrists working on a part-time basis, flexible working arrangements, and child-care support may need to be considered. The dilemma faced by

parents attempting to balance their working and family life was acutely highlighted by one respondent:

*“unless more cover becomes available I will leave the sector completely. Choice between family or career and family will win. Predominantly optometry has become a female oriented job. So more flexibility has to be available to keep us from leaving the sector completely. (sic)”*

In terms of future career intentions, a large proportion (39.29%), expressed a desire to become practice owners in the future, which shows a high level of entrepreneurship amongst the profession. Employers may wish to consider ways to encourage this, such as through mentoring programs. By contrast in the open ended questions, some students expressed an interest in an optometry career that isn't as closely tied to a retail environment.

In the open ended questions many of the professionals raised concerns regarding the role of changing technology, online and low cost retailers, and what effect this may have on the profession in the future. Whilst some saw this as an opportunity to make a new niche for the profession, or follow a more clinical path, there is a degree of anxiety for what the future may hold.

A high proportion of the students, 82.35%, saw their chances of gaining employment in the first 12 months after they graduate as being very high; this reflects anecdotal evidence from members of a current high demand in Ireland for trained optics professionals and low supply of local graduates. This was supported by many of the responses to the open ended questions, where they did not see significant barriers to the gaining work in the sector on the completion of their degree.

Most of the students (over 83%) surveyed hold part time jobs whilst undertaking their studies. Whilst obviously putting pressure on their time available for studying, this will likely assist their employability and their ability to transition to full-time work, despite the concerns of some regarding the need for more experience. Over 61% of those with part-time jobs work in an optical practice, which will further improve their readiness for life in the profession, whilst also giving a more accurate insight into their future career prospects.

## Recommendations

Based on the above results and discussion, this report makes the following recommendations:

- 1. That the current funding arrangements for optometry degrees be amended so that universities do not run these programs at loss.**
- 2. That consideration be given to supporting a second university in Ireland to provide an optometry degree.**

Recommendations 1 and 2 are intended to address the current low supply of locally trained optometry graduates. The Dublin Institute of Technology is known to run the optometry degree at a loss due to funding arrangements that classify the program as a science degree rather than as clinical degree. These funding arrangements have been raised as a disincentive to taking on any more students than the current annual intake of 25 per year for

the optometry degree, as more students would only increase the losses incurred by the institute.

**3. That the HSE make more use of the full scope of practice for optometrists and dispensing opticians by contracting additional services to community optical practices.**

Recommendation 3 is based on the responses to questions 12 to 15 which showed overwhelming support from the profession for taking on more clinical roles and making more use of the full range of their skills as optometrists or dispensing opticians. This would assist in alleviating some of the lengthy waiting lists for eye care services and the avoidable visual impairment which occurs due to these waiting times.

**4. That employers in the optical sector implement more flexible working arrangements to adapt to and retain more of what will become a more female orientated workforce.**

Recommendation 4 is in response to the demographic profile of the current workforce which is majority female and the students who will make up the future workforce where an even greater proportion of the workforce is female. The responses to questions 17-19 showed a significant proportion of the workforce will be taking a break from the profession in the coming years for parental leave; many of these professionals expressed a desire to continue in their work in the sector, but highlighted the need to balance family life while still pursuing their career.

**5. That training or CPD courses be developed to assist optometrists and dispensing opticians to adapt to technological changes in the optical sector.**

Recommendation 5 is based on concerns raised by a large proportion of the professional respondents about the role that changing technology will play in the sector in the future. Most optics professionals will need training in order to adapt to these new technologies.

**6. That FODO Ireland consider introducing an available jobs section to its new website.**

Recommendation 6 is based on responses from students who expressed a desire to know more about the job opportunities in the sector.

## **Appendix A - Questionnaire**



I R E L A N D

FEDERATION OF (OPHTHALMIC AND DISPENSING) OPTICIANS

Irish Optical Sector Survey

Welcome and demographic questions

**Thank you for taking the time to complete this questionnaire. The questionnaire is anonymous and should take no more than 5 minutes to complete. The questionnaire will provide a valuable insight into the profile, nature and future directions of the optical sector in Ireland, and will help us to make strong arguments when we represent you.**

\* 1. Which of the follow age groups do you belong to?

- |                                |                                |
|--------------------------------|--------------------------------|
| <input type="checkbox"/> 17-19 | <input type="checkbox"/> 50-59 |
| <input type="checkbox"/> 20-29 | <input type="checkbox"/> 60-69 |
| <input type="checkbox"/> 30-39 | <input type="checkbox"/> 70-79 |
| <input type="checkbox"/> 40-49 | <input type="checkbox"/> 80+   |

\* 2. What is your gender?

- Male
- Female
- Prefer not to say

Other (If you prefer to use your own term please provide this here)

\* 3. Are you?

- An optometrist
- A dispensing optician
- A student





I R E L A N D

FEDERATION OF (OPHTHALMIC  
AND DISPENSING) OPTICIANS

Irish Optical Sector Survey

Professional Questions

\* 4. In which country did you obtain your optical qualification?

- Republic of Ireland
- United Kingdom
- Other (please specify)

\* 5. Do you work?

- Full time
- Part time



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FEDERATION OF (OPHTHALMIC  
AND DISPENSING) OPTICIANS

Irish Optical Sector Survey

Professional Questions

\* 6. If part time, how many contracted hours per week do you work?

0 40

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I R E L A N D

FEDERATION OF (OPHTHALMIC  
AND DISPENSING) OPTICIANS

Irish Optical Sector Survey

Professional Questions

\* 7. How many locations do you work at?

- One
- Two
- Three or more

\* 8. Are you a practice owner?

- Yes
- No



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AND DISPENSING) OPTICIANS

Irish Optical Sector Survey

Professional Questions

9. Is your practice?

- An independent practice
- A franchise/ joint venture
- Part of a multiple chain



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FEDERATION OF (OPHTHALMIC  
AND DISPENSING) OPTICIANS

Irish Optical Sector Survey

Professional Questions

10. Is the main practice that you work at?

- An independent practice
- A franchise/ joint venture
- Part of a multiple chain

11. Do you have plans to become a practice owner in the future?

- Yes
- No



I R E L A N D

FEDERATION OF (OPHTHALMIC  
AND DISPENSING) OPTICIANS

Irish Optical Sector Survey

Professional Questions

12. If you are an optometrist, would you like to make more use of the full range of your skills (e.g. in prescribing or pre- and post-cataract care, glaucoma management or AMD management)?

- Yes
- No
- I'm a dispensing optician

13. If you answered yes to question 12, please specify in which area:





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FEDERATION OF (OPHTHALMIC  
AND DISPENSING) OPTICIANS

Irish Optical Sector Survey

Professional Questions

14. If you are a dispensing optician would you like to make more use of the full range of your skills (eg low vision services, minor eye conditions)?

- Yes
- No
- I'm an optometrist

15. If you answered yes to question 14, please specify in which area:



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FEDERATION OF (OPHTHALMIC  
AND DISPENSING) OPTICIANS

Irish Optical Sector Survey

Professional Questions

16. Is there anything that would help you to make greater use of your full range of skills as an optometrist or as a dispensing optician?

\* 17. Do you intend to leave or take a break from the optical sector in the next 5 years (including to take parental leave)?

Yes

No



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FEDERATION OF (OPHTHALMIC  
AND DISPENSING) OPTICIANS

Irish Optical Sector Survey

Professional Questions

18. How long will you be leaving the optical sector for?

- 6-18 Months
- 18 months–3 years
- 3-6 years
- Permanently

19. If you plan to leave the sector, is this due to?

- Parental leave
- Career change
- Retirement

Other (please specify)

20. If you plan to take parental leave, are there any measures that would help you return to work sooner?



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FEDERATION OF (OPHTHALMIC  
AND DISPENSING) OPTICIANS

Irish Optical Sector Survey

### Student Questions

\* 21. What qualification are you studying towards?

- BSc Ophthalmic Dispensing
- BSc in Optometry

22. Do you also have a part time job in addition to your studies?

- Yes
- No

23. Is this job in an optical practice?

- Yes
- No

\* 24. Do you intend to work as an optometrist or dispensing optician in the Irish optics sector after you graduate?

- Yes
- No



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FEDERATION OF (OPHTHALMIC  
AND DISPENSING) OPTICIANS

Irish Optical Sector Survey

Student Questions

\* 25. If not, do you intend to?

- Move overseas
- Pursue a career in optics academia
- Undertake studies towards an alternative health career
- Seek a career in an different sector
- Other (please specify)



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FEDERATION OF (OPHTHALMIC AND DISPENSING) OPTICIANS

Irish Optical Sector Survey

Student Questions

\* 26. How do you rate your chances of gaining employment in the optical sector in the first 12 months after you graduate?

Very Good	Good	Unsure	Poor	Very poor
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

27. What do you see as being the main challenges to you gaining employment in the Irish optics sector after you graduate?

28. What are the main issues that you feel you need further information on, in order to assist your entry to the workforce?

29. Are there any measures that would assist you in finding employment in the Irish optics sector after you graduate?

30. What factors would make a potential employer more attractive to you?







I R E L A N D

FEDERATION OF (OPHTHALMIC  
AND DISPENSING) OPTICIANS

Irish Optical Sector Survey

### Future Issues

\* 31. What do you think are the main challenges for optical professionals and the wider optical sector over the next 5-10 years?