

General Optical Council



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Research Report



BMG Research GOC 2015 Contact Lens Survey

Prepared for: The General Optical Council

Prepared by: BMG Research

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Prepared for: The General Optical Council

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1 Introduction

1.1 Background

The General Optical Council (GOC) is one of nine UK healthcare regulators and regulates the optical professions in the UK. It currently has on its register around 28,000 optometrists, dispensing opticians, student optometrists, student dispensing opticians and optical businesses.

The GOC's mission is to protect and promote the health and safety of the public; it has four core functions:

- Setting standards for education and training, performance and conduct;
- Approving qualifications leading to registration;
- Maintaining a register of individuals' fitness to practise, train or carry on business; and
- Acting where registrants' fitness to practise, train or carry on business may be impaired.

To reduce the risk of public harm, in July 2014 the GOC approved a new strategy for tackling illegal practice in the optical sector. As part of this strategy the GOC agreed to:

- Issue guidance for the public on the safe purchase and use of contact lenses;
- Develop a voluntary code of practice for the supply of contact lenses online; and
- Carry out further research and intelligence-gathering.

The GOC is currently developing the voluntary code of practice for online contact lens suppliers in partnership with stakeholders and is hopeful that this will improve the practice of any online supplier signing up to the code, particularly those based outside of the UK. The code will be a list of points that an online supplier has to commit to when administering their business. It will include use of a logo, which will be monitored by an independent body to ensure compliance with the code. The GOC intends to raise awareness of the code, and of the value of purchasing from a supplier displaying the logo, in the guidance that it produces for the public on the safe purchase and use of contact lenses.

1.2 Research objectives

The GOC commissioned BMG Research to undertake a consumer research study to understand more about the behaviour of contact lens wearers, including those who buy online. This research will help the GOC to implement its illegal practice strategy and provide a benchmark to measure the impact of the strategy.

Specifically, the GOC would like to be able to understand:

- Views about contact lenses as a healthcare product;

- Regularity of eye examinations and contact lens check-ups, including information provided at these appointments (in relation to both aftercare¹ advice and documents provided e.g. spectacle prescription and contact lens specification);
- Where, when and what type of contact lenses were last purchased (e.g. online or in-store) and reasons for where;
- Why consumers do not currently buy contact lenses online and any factors that would make them more likely to do so in future;
- Awareness of and compliance with contact lens aftercare advice;
- How often people wear zero powered contact lenses (for cosmetic purposes) and where they buy them from;
- Consumers' views towards codes of practice and whether such a code would change their behaviour; and
- How to target guidance for consumers effectively.

1.3 Methodology

1.3.1 Preliminary qualitative research

In order to inform the quantitative questionnaire design, preliminary qualitative research was carried out, specifically through three online focus groups and two face-to-face focus groups (held in London and Manchester). A total of 30 individuals were consulted from a mixture of genders, age groups, ethnicities, lifestyles and regions.

The report based on the findings of the focus groups is available on request.

1.3.2 Sampling and data collection

The main survey sample consists of 2,043 respondents who live in the UK and currently wear and buy contact lenses, sourced via the Respondi online panel. The survey was conducted online from 13th to 20th October 2015. Each interview took approximately 10-15 minutes depending on the answers given.

A sample size of 2,043 carries a maximum confidence interval of $\pm 2.2\%$ at the 95% confidence level. Readers should note that sub-samples are subject to larger confidence intervals. Where a difference is referred to as 'significant' it will have been corroborated via statistical testing.

In addition to the main survey, a number of questions were added to the BMG Omnibus survey in order to understand what proportion of the general public had ever worn zero-powered contact lenses, where they have been bought from and whether they received any advice on how to wear the contact lenses safely. The BMG Omnibus survey is conducted online on a monthly basis and these questions were included from 22nd to 27th October 2015. This sample consists of 1,501 members of the general public who live in the UK.

1.3.3 Questionnaire

The questionnaire was developed with the GOC and was split into a number of sections:

¹ Aftercare advice was defined as advice on how to wear and look after their lenses.

- Screener
- Contact lens use
- Eye examinations/tests and contact lens check ups
- Purchasing behaviour
- Code of practice
- Internet use
- Classification

The full questionnaire is available on request.

2 Executive Summary

2.1 Introduction

The GOC commissioned BMG Research to undertake a consumer research study about the behaviour of contact lens wearers, including those who buy online. The research will help the GOC implement its illegal practice strategy and provide a benchmark from which to measure its impact.

The main survey sample consists of 2,043 respondents who currently wear and buy contact lenses, recruited to participate via online panels. The GOC also commissioned a number of questions on the BMG UK Omnibus, a nationally representative survey of UK adults, in order to estimate the proportion of adults that had ever worn zero-powered contact lenses. This sample consists of 1,501 members of the general public. Both surveys were conducted online in October 2015.

2.2 Purchasing behaviour

In-store or online buyers?

The results suggest just over two thirds of respondents have only ever bought their contact lenses in-store (68%), 8% have only ever bought online whilst around a fifth have, at some point, bought contact lenses both in-store and online (22%). Overall, in terms of where contact lens wearers buy from most frequently, three quarters primarily buy in-store (77%) and 21% primarily buy online².

Compared to those who primarily buy their contact lenses in-store, online buyers are more likely to be aged between 25 and 44 (whereas in-store buyers are more likely to be aged 45 and over) and in part-time employment (whereas in-store buyers are more likely to be retired or long-term unemployed). In addition, online buyers are more likely to live in London and be classed as 'multicultural metropolitans' compared to in-store buyers. For those who primarily buy online, more than a third of respondents say the main reason is price (37%), while a quarter say convenience (23%) and a fifth say value for money (19%). For those who primarily buy in-store, nearly a quarter say it is due to the relationship with the optician (23%), 16% say convenience and 13% say they have always bought their contact lenses from there.

In-store still dominant

Around two thirds of respondents have never bought contact lenses online (68%) and were asked their reasons for this. Nearly half have no reason to change / are satisfied with buying in-store (44%), while three in ten prefer to buy contact lenses in person (30%) or would not trust an online seller (27%). A significant proportion have never bought online because they would not know how to find the specific contact lenses they need (18%) or because they do not know their contact lens specification (12%). One in ten are planning to buy contact lenses online at some point but have not done so yet (11%).

² Readers should note that, throughout this study, when the sub-set of respondents who primarily buy online are referred to, they total a base of 432 and carry a maximum confidence interval level of 4.7%.

Convenience an important factor for online buyers

Overall, price is seen as the most important factor in choosing where to buy contact lenses. This is followed by good customer service and the retailer's reputation, while convenience and the products that are available are seen as less important. However, those who buy their contact lenses online are more likely to value convenience and the products that are available over the reputation of the retailer and customer service.

2.3 Eye tests and contact lens check-ups

Purchasing mode linked with frequency of tests/check-ups

The data on tests and check-ups suggests that around a fifth of contact lens wearers go for eye examinations/sight tests more than once a year (18%), whilst about half go about once a year (49%) and three in ten go about every two years (29%). The results are similar to when respondents were asked how frequently they go for contact lens check-ups. Some 21% said they go more than once a year, whilst 54% tend to go about once a year, and just 16% go every two years. Those who primarily buy their contact lenses in-store are much more likely to have more frequent contact lens check-ups (79% at least once a year) when compared to those who primarily buy online (60%).

Specifications

Four fifths of respondents were provided with their spectacles prescription at their most recent eye test (81%), while 8% said they were not provided with one but had a copy from a previous test. The remaining 11% did not have their spectacles prescription. Comparatively, a smaller proportion, just six in ten, were provided with their contact lens specification at their most recent check-up (59%), while some 15% were not provided with one but had a copy from a previous check-up. The remaining 26% did not have their contact lens specification at all.

There was substantial variation between subgroups on the likelihood of having a copy of their contact lens specification.

Those who were significantly **less** likely to have a copy tended to be:

- Unemployed;
- Those who have worn contact lenses for over 20 years;
- Those who last bought contacts more than one year ago;
- Those who don't shop around much/at all for contact lenses; and
- Those who viewed contact lenses as a cosmetic product.

Those identified as being significantly **more** likely to have a copy of their contact lenses were:

- Those in employment;
- Those living with children and with at least one other adult in the household;
- Those with a disability;
- Those who have worn contact lenses for 20 years or less; and
- Those who wear contact lenses every day or 1-5 times a week/a few times a month.

Ordering online

Around two thirds of those who primarily buy online said that the website they use most frequently does require them to provide their contact lens specification (64%), while a quarter said it was not required (24%). The remainder (13%) could not recall.

Of the respondents who said the website they use required details from their contact lens specification, around two thirds actually used the information from their specification in order to complete the purchase (66%). Just under a quarter of respondents used information from their current contact lenses packaging (24%) or from their spectacles prescription (22%), while even fewer took the required details from their last order (9%) or contacted their optician to get their contact lens specification (8%). Strikingly, around one in twenty said that they guessed what they would need (5%).

2.4 Aftercare advice

Receiving advice linked with experience wearing lenses

When asked, around half of respondents who have ever had a contact lens check-up said that they were provided with advice on how to wear and look after their lenses (i.e. aftercare advice) at their most recent check-up (48%). The other half said they were either not provided with any advice (35%), or could not recall whether any was given (17%). Intuitively perhaps, there appears to be a relationship between respondents' experience of wearing contact lenses and the likelihood of receiving advice. Those who have been wearing contact lenses for more than 20 years are significantly less likely to have been provided with aftercare advice (33%) compared to those who have worn them for 5 years or less (56%) or 6 to 20 years (50%).

Was advice useful?

The vast majority of those who were provided with aftercare advice found the advice either very useful (48%) or quite useful (47%). Just 4% said the advice was not very/at all useful. Of those who did not receive any aftercare advice, 33% said they would have found it useful to have had some.

Online advice

There appears to be a slight difference in the level of advice received online. Of those who primarily buy their contact lenses online, 45% (3 percentage points less than those who primarily buy in-store) said they received information and instructions on how to wear and look after their contact lenses when they receive their order. Two fifths say they did not (39%, 4 percentage points more than those who primarily buy in-store) while the remainder did not know (16%).

Dos and don'ts

In most cases there was fairly high awareness of the contact lens aftercare advice 'dos' and 'don'ts', provided by the British Contact Lens Association (BCLA). The majority of respondents comply with the advice they are aware of, but there is little variation between specific 'dos' and 'don'ts'.

The advice with the lowest levels of awareness includes the need to replace the lens case at least monthly (61%), the advised method of cleaning the lens case (63%) and not switching the solution they use except on the advice of their practitioner (64%).

In terms of compliance with the advice, fewer than one in five respondents do not follow each of the pieces of advice despite being aware of it. The advice with the highest level of non-compliance is replacing the lens case at least monthly (21% aware but do not follow), followed by using lenses for swimming, hot tubs or water sports without goggles (17%), not following the advised method of cleaning the lens case (16%), not discarding lenses and solutions that are past their expiry date (16%) and wearing lenses when showering (15%).

Just over three quarters of respondents have experienced at least one problem in relation to wearing their contact lenses at some point (77%). This is most commonly dry eyes (52%), followed by sore eyes (36%) and damaged a contact lens (29%). Some 16% said that they had experienced an eye infection in relation to them wearing contact lenses. There appears to be a relationship between people's level of compliance with aftercare advice and the problems they experience which are associated with wearing contact lenses. The results show that the proportion of respondents that have experienced any problems as a result of wearing contact lenses (such as dry eyes, sore eyes, and/or an eye infection) decreases as compliance with aftercare advice increases. For those who adhere to less than half the aftercare advice points, 84% say they have experienced some issue as a result. This is compared to 78% of those who comply with between 50% and 79%, and just 73% of those who comply with more than four in five of the points. These findings are strong evidence in favour of the view that adherence to aftercare advice reduces many of the problems associated with the use of contact lenses.

2.5 Code of practice

Randomised control trial

In order to robustly measure the impact of any accreditation on the propensity of consumers to purchase from an online contact lens retailer, a randomised control trial (RCT) was conducted during the study. Respondents were randomly allocated to either a control group or treatment group. Respondents were asked to read a passage describing a fictional product for sale. This passage was identical for both the treatment and control groups, apart from one key piece of information for the treatment group. The control group were only shown the description of a contact lens product offer, while the treatment group were also shown the offer but with a sentence that indicated that the website was accredited by professional bodies in the optical sector³. Respondents were then asked to rate how likely they would be to buy contact lenses from the fictional online retailer. The results showed a small but statistically significant increase in propensity to purchase for those shown the accredited version.

General views of accreditation

³ “We are accredited by professional bodies within the optical sector, supported by the General Optical Council, the regulator for the optical professions (optometrists and dispensing opticians) in the UK”.

Subsequent to the RCT, respondents were then asked a general question about whether the use of a logo on a website would make them more or less likely to buy contact lenses from that particular retailer. Over half of respondents claimed that a logo would increase their propensity to purchase (55%).

Results from both the prompted question and the RCT suggest that contact lens wearers are more likely to purchase from an accredited retailer. However the extent to which buyers will do so is likely to be closer to the RCT results than the open question to all respondents. The reason that these approaches differ significantly is because they are two very different testing methods. Readers should take the results from the prompted question as general context, whilst it is likely that the size of the impact will be much closer to the results of the RCT.

2.6 Zero-powered contact lenses

Prevalence

Results from the BMG UK Omnibus reveal that around 7% of the general public have ever worn zero-powered contact lenses. This proportion is significantly higher among those aged 25 to 34 years old (21%), those with a household income of £50,000 or more (13%), those living in London (19%) and those in areas defined as cosmopolitan or ethnicity central (both 21%, descriptions in the appendix).

Where from?

Around two fifths said that they bought zero-powered contact lenses from their regular optician (41%) or from an internet supplier (39%). A third of respondents (34%) bought the lenses from a fancy dress/joke shop, and a similar proportion from an optical practice that was not their regular optician (32%), whilst just less than a quarter of buyers did so from a pharmacy (23%) and some 12% from a hairdressers.

Advice

Four fifths (80%) of those who have bought zero-powered contact lenses said they received advice on how to wear them safely, while 17% did not. The remaining 3% could not recall. Those who bought the lenses from their regular optician or an optical practice are significantly more likely to have received advice on how to wear them safely (95%), particularly when compared to those who bought in a fancy dress/joke shop (77%).

3 Profile of contact lens wearers

This section of the report summarises the profile of those who wear contact lenses in terms of demographics, working status, socio-economic grade and internet use. It also explores the type(s) of contact lenses worn, length of time worn for, reasons for wearing contact lenses, their importance in day-to-day life and what type of product they are seen as.

3.1 Demographic profile

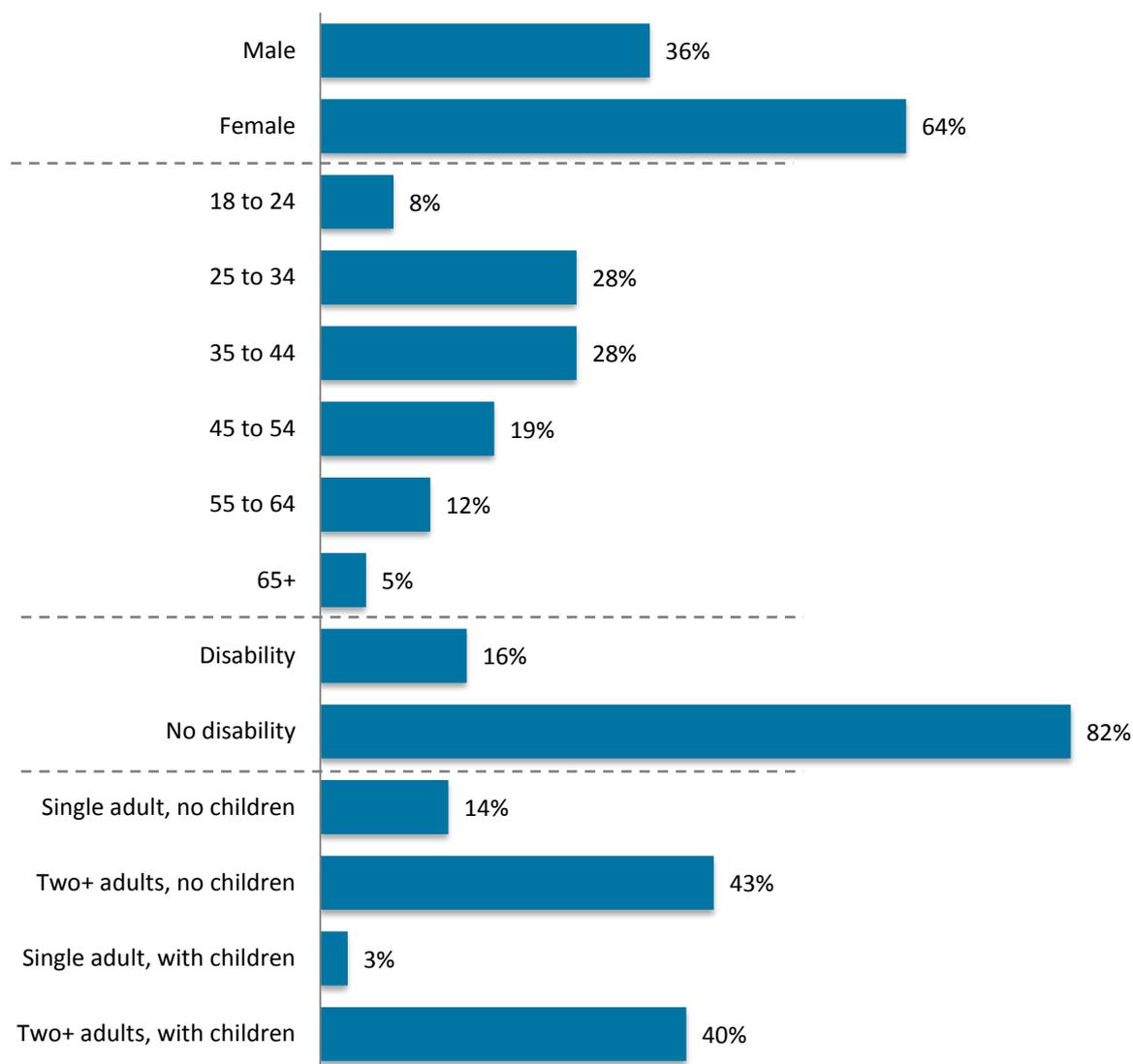
The demographic profile of contact lens wearers is summarised in the figure below.

Nearly two thirds of contact lens wearers are female (64%) while a third are male (36%). Over half of contact lens wearers are aged between 25 and 44 (56%), while 19% are aged 45 to 54 and 12% are aged 55 to 64. Relatively few are aged 18 to 24 (8%) or 65+ (5%).

Sixteen per cent of contact lens wearers consider themselves to have a disability.

In terms of household composition, 43% of respondents live with one or more adults and no children, 40% live with one or more adults and children, while 14% live alone and 3% live with children but no other adults.

Figure 1: Profile of contact lens wearers by gender, age, disability and household composition (all respondents)



QC1. Are you male or female?

QC2. What was your age on your last birthday?

QC10. Do you consider yourself to have a disability?

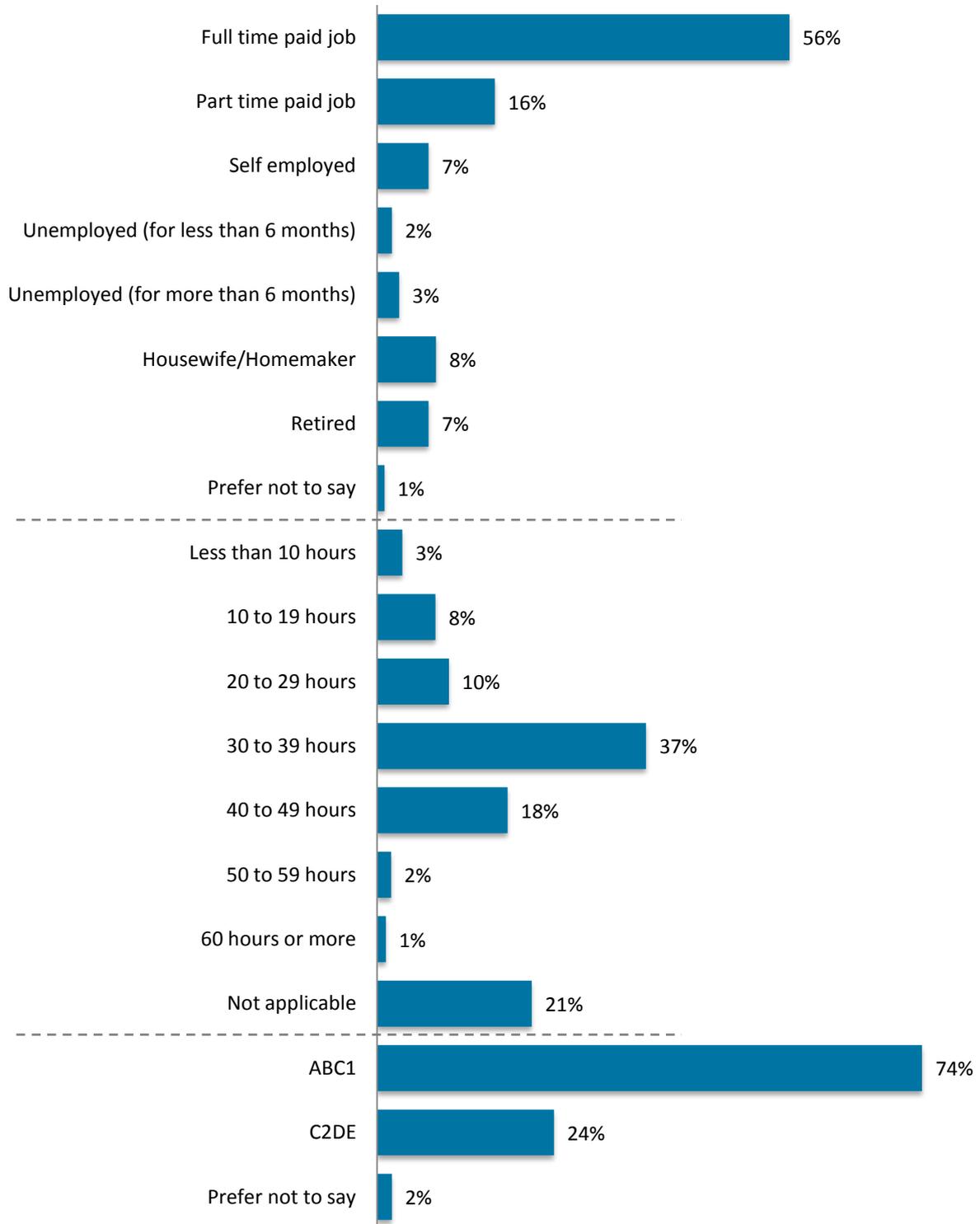
QC7. How many other adults live in your household, excluding yourself?

QC8. How many children live in your household?

Sample base = 2043

The following figure details the working status and socio-economic grade of contact lens wearers. More than half currently have a paid full-time job (56%), 16% are in part-time work and 7% are self employed. The remaining 21% are not currently in employment or declined to respond. Of those in employment, the majority work at least 30 hours per week (58%). Based on the chief income earner in their household, three quarters of contact lens wearers are classified as ABC1s (74%), while 24% are C2DEs.

Figure 2: Profile of contact lens wearers by working status, hours worked per week and socio-economic grade (all respondents)



QC4. What is your current working status?

QC5. Approximately how many hours do you currently work per week?

QC6. Which of the following best describes the occupation of the chief income earner in your household?

Sample base = 2043

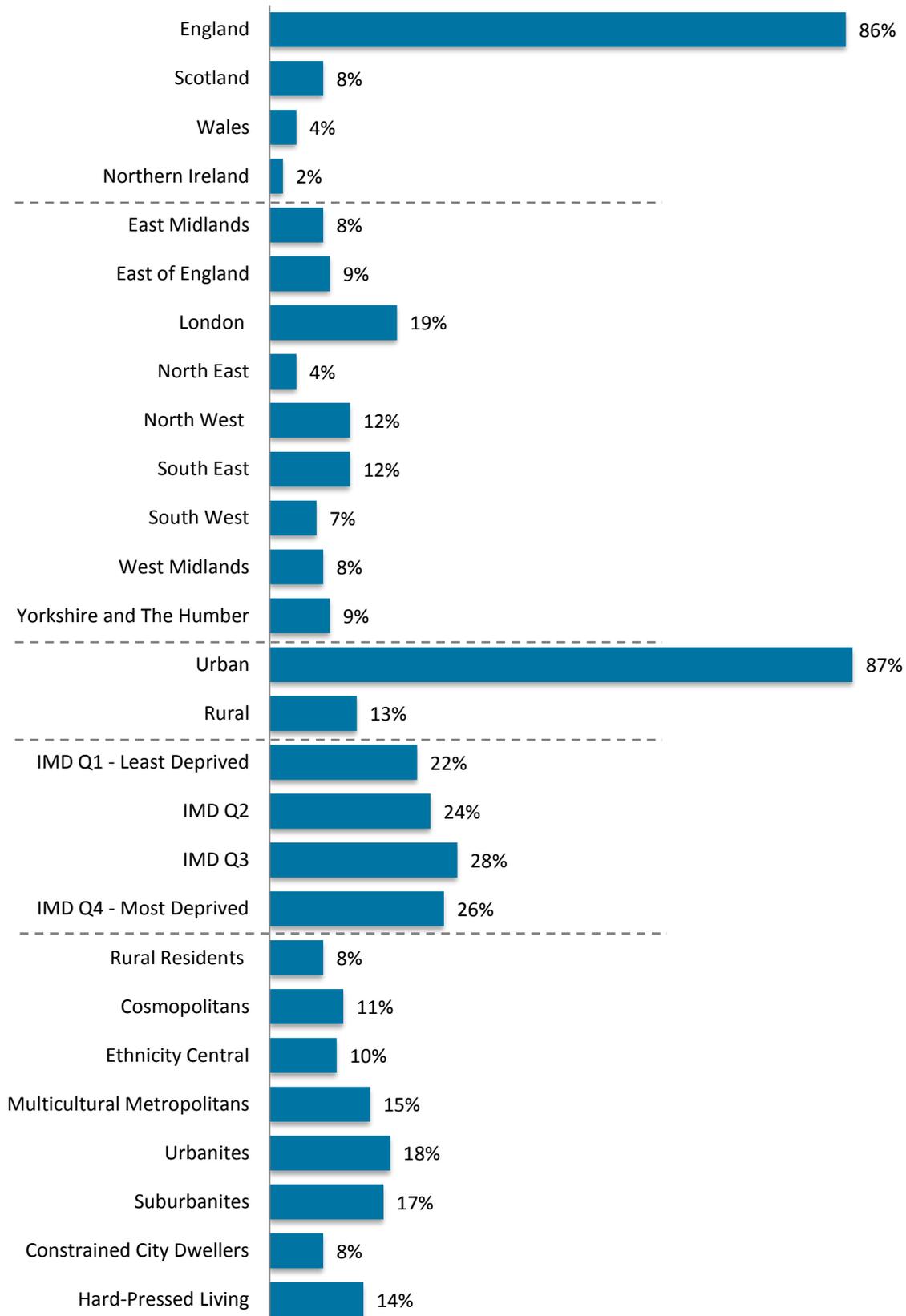
Respondents were asked to provide their postcode at the start of the survey in order to enable analysis by country, region, urban vs rural, level of deprivation (using Index of Multiple Deprivation⁴ quartiles) and Output Area Classification⁵ groups (a full description of which can be found in Appendix 2).

In line with national proportions, the majority of the sample currently lives in England (86%), while 8% live in Scotland, 4% in Wales and 2% in Northern Ireland. There is also a good spread across regions in England, as well as a mix of deprivation levels and output area classifications.

⁴ The Indices of Deprivation are based on 37 separate indicators, organised across seven distinct domains of deprivation which are combined, using appropriate weights, to calculate the Index of Multiple Deprivation (IMD). This is an overall measure of multiple deprivation experienced by people living in an area and is calculated for every neighbourhood in England. Every such neighbourhood is ranked according to its level of deprivation relative to that of other areas.

⁵ Area classifications group together geographic areas according to key characteristics common to the population in that grouping. These groupings are called clusters and are derived using census data. A full description of the groups can be found in the Appendix 2.

Figure 3: Profile of contact lens wearers by region (all respondents)



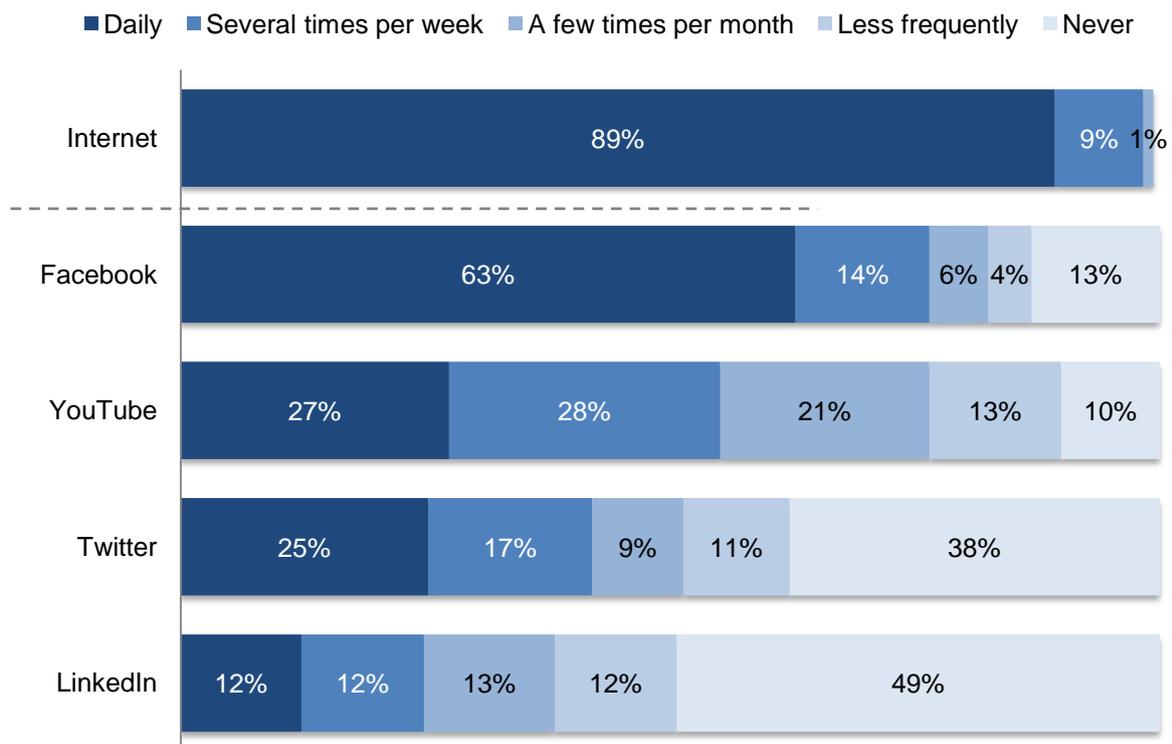
Could you please provide your postcode?
 Sample base = 2043

3.2 Internet use

Almost all respondents access the internet either on a daily basis (89%) or several times per week (9%), while just 1% go online a few times per month.

Facebook is the most commonly used social media site, with three quarters of contact lens wearers using it daily or several times per week (77%). This is followed by YouTube (55% using it daily/several times per week). LinkedIn and Twitter are used less frequently, with 49% and 38%, respectively, never using these sites.

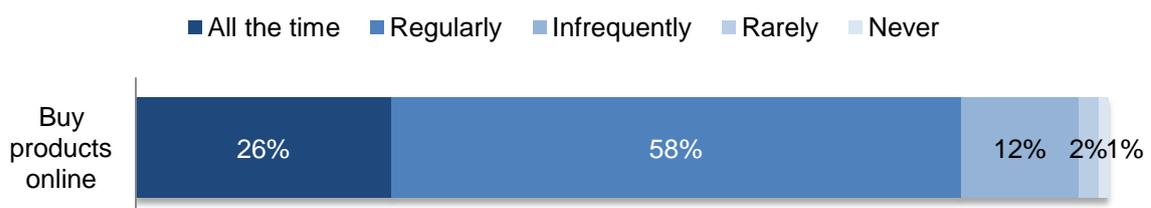
Figure 4: Internet and social media use (all respondents)



F1. How often do you access the internet for personal use?
 F2. How often do you use any of the following social media sites?
 Sample base = 2043

Respondents were also asked how often they buy products online. The majority do so all the time or regularly (84%), while 12% do so infrequently and 2% rarely. Just 1% never buy products online.

Figure 5: How often buy products online (all respondents)



F3. How often, if at all, do you buy products online?
 Sample base = 2043

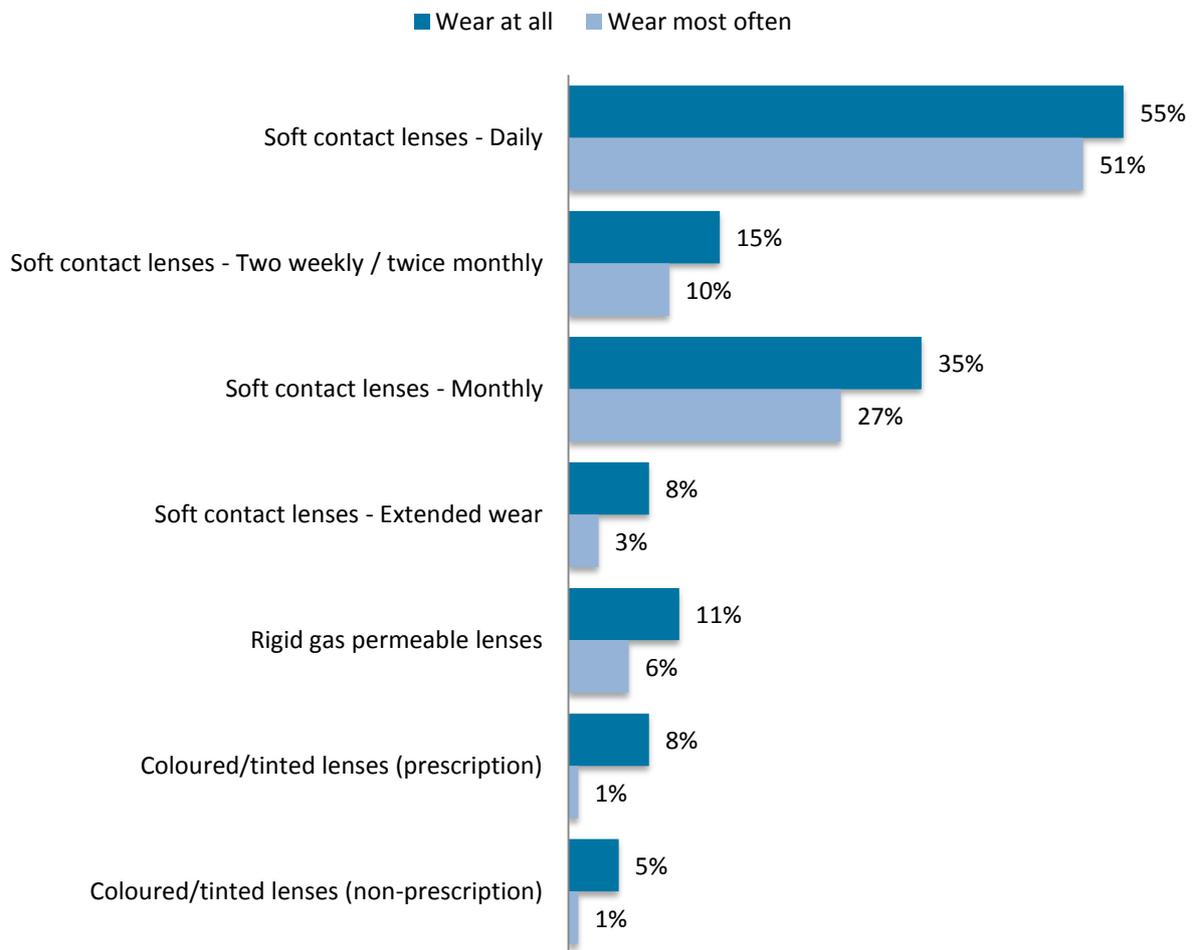
Comparing this to the results from the Omnibus survey⁶ reveals that a significantly greater proportion of contact lens wearers buy products online ‘all the time’ compared to the general public (26% cf. 14%). Three in ten of the general public buy products online infrequently, rarely or never (30%) compared to just 15% of contact lens wearers.

3.3 Contact lens wear

At the start of the survey, respondents were asked what type of contact lenses they wear and, if they wear more than one type, what type they wear most often.

Daily soft contact lenses are the most common type, with 51% of respondents wearing these most often. This is followed by monthly soft contact lenses (27%), two weekly/twice monthly soft contact lenses (10%) and rigid gas permeable lenses (6%). One per cent of respondents wear prescription coloured/tinted lenses most often, and one per cent wears non-prescription (zero-powered) coloured/tinted lenses most often.

Figure 6: Type of contact lenses worn (all respondents)



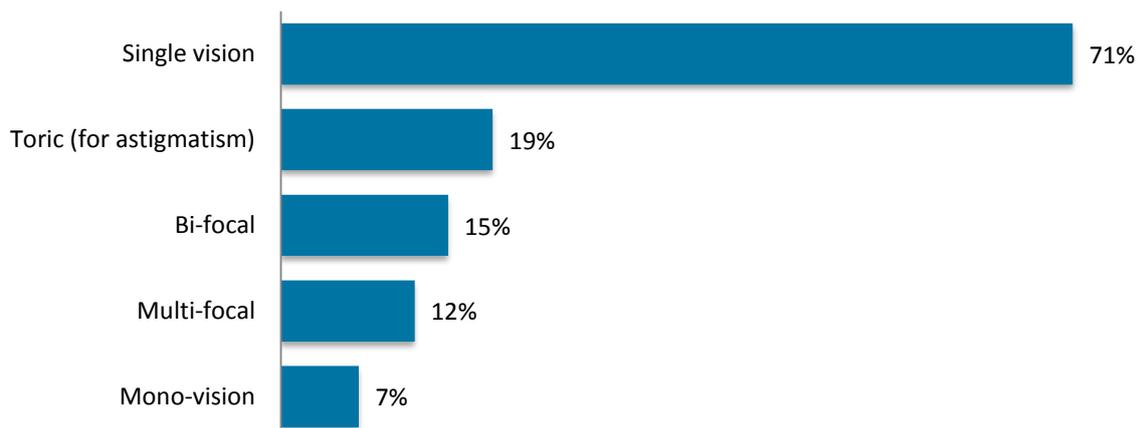
A1a. What type of contact lenses do you wear?

⁶ Omnibus data on internet usage is available here www.bmgresearch.co.uk/internet-usage-october2015

A1b. What type of contact lenses do you wear most often?
Sample base = 2043

Single vision lenses are worn by seven in ten contact lens wearers (71%), while significantly fewer wear toric (19%), bi-focal (15%), multi-focal (12%) or mono-vision lenses (7%). Some respondents wear more than one type of contact lens, hence why these figures total more than 100%.

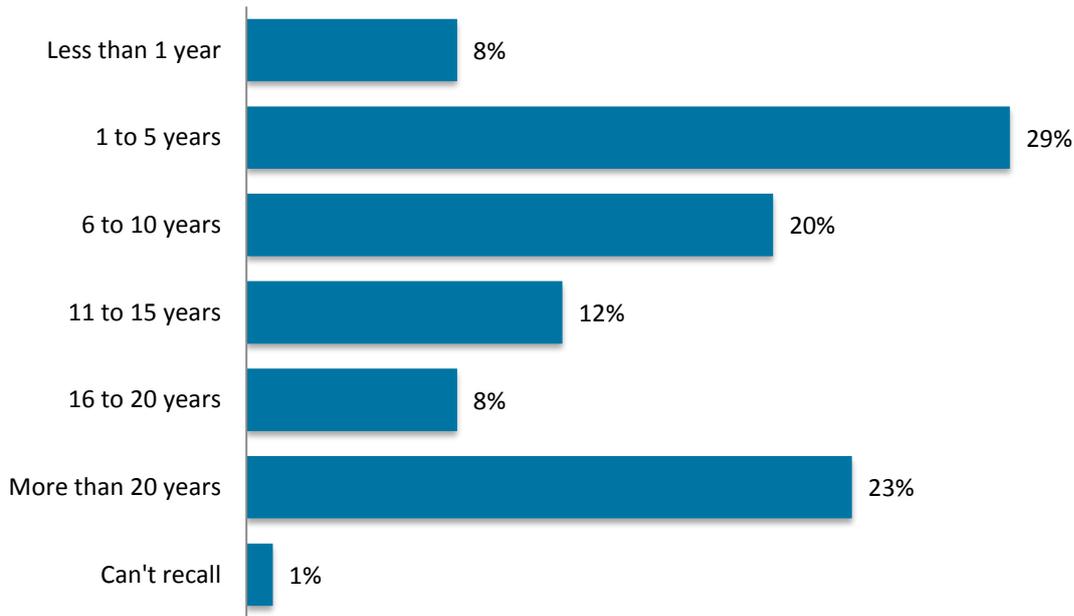
Figure 7: Type of contact lenses worn (all respondents)



A1c. Which of the following do you wear?
Sample base = 2043

Just over a third of respondents have been wearing contact lenses for 5 years or less (37%), while a further two fifths have been wearing them for between 6 and 20 years (40%). A quarter have worn contact lenses for more than 20 years (23%), while the remaining 1% could not recall.

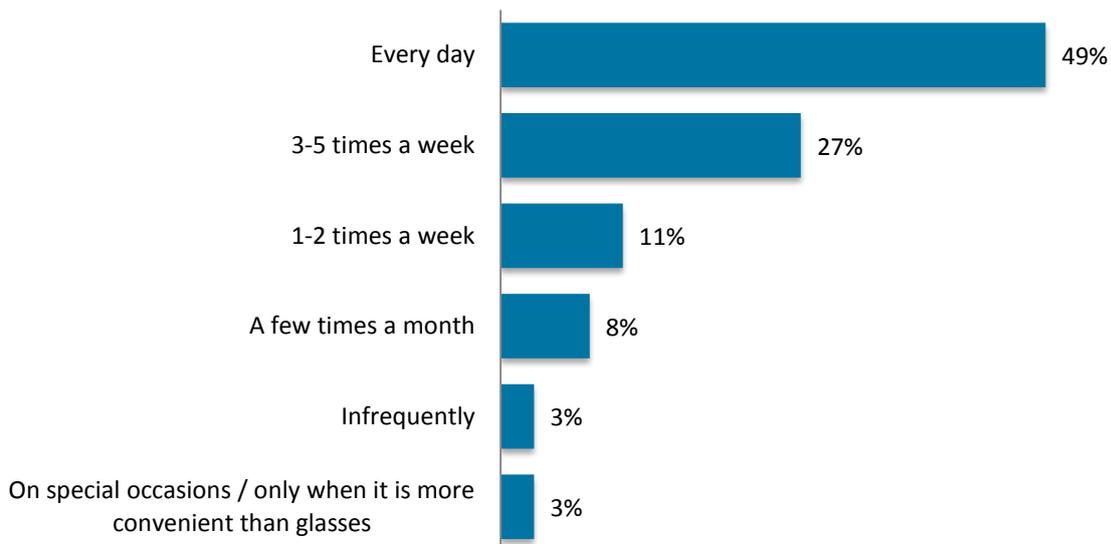
Figure 8: Length of time worn contact lenses for (all respondents)



A2. How long have you been wearing contact lenses for?
 Sample base = 2043

Nearly half of respondents wear their contact lenses every day (49%), with a further quarter wearing them 3-5 times a week (27%) and one in ten wearing them 1-2 times a week (11%). The remaining 14% wear them less frequently, which includes 3% who only wear contact lenses on special occasions/when it is more convenient than glasses.

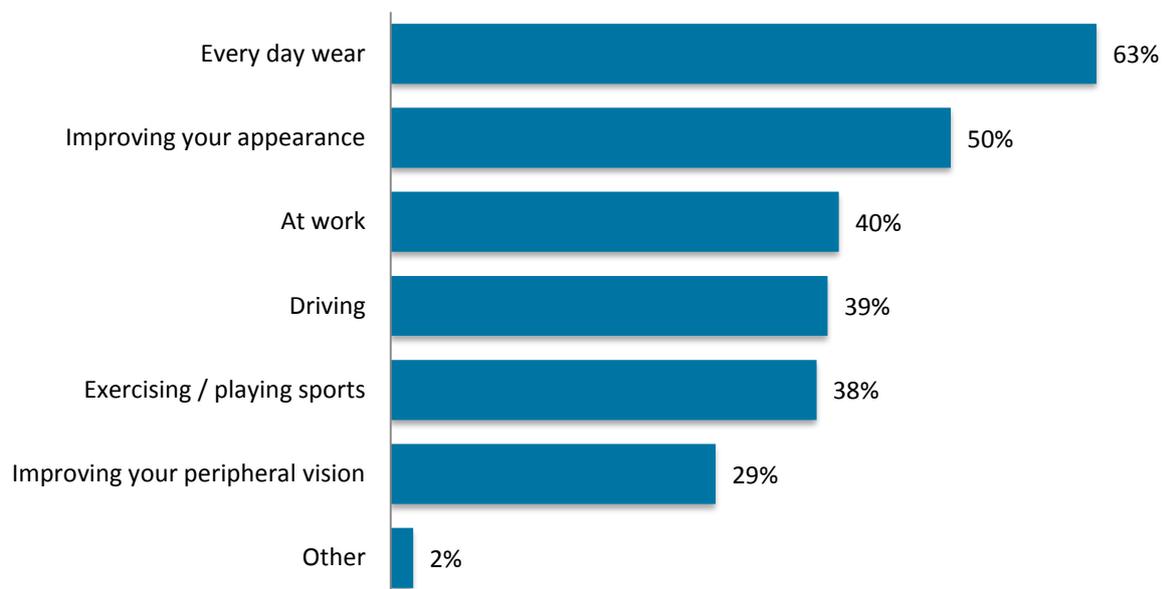
Figure 9: Frequency of wearing contact lenses (all respondents)



A3. How frequently do you wear contact lenses?
 Sample base = 2043

Respondents gave a variety of reasons for wearing contact lenses, with two thirds citing every day wear (63%) and half wearing contact lenses to improve their appearance (50%). Around two fifths wear contact lenses at work (40%), for driving (39%) or exercising/playing sports (38%), and three in ten wear them to improve their peripheral vision (29%).

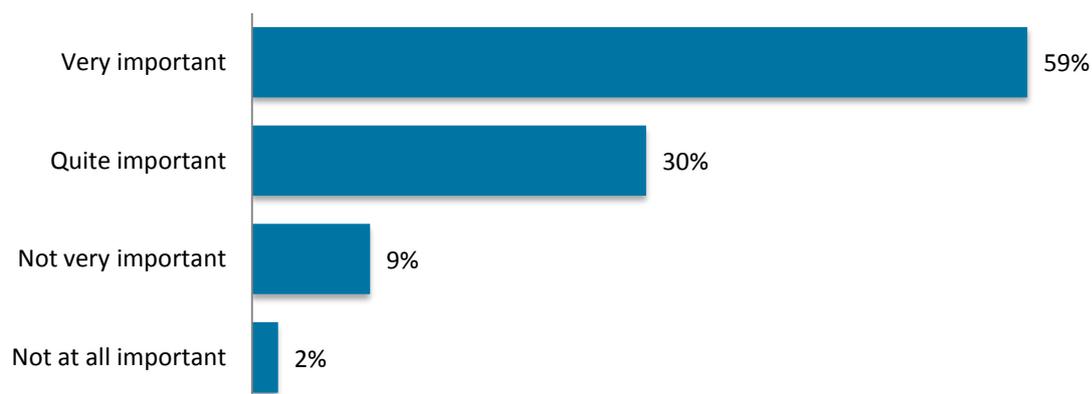
Figure 10: Reasons for wearing contact lenses (all respondents)



A4. What do you wear contact lenses for?
 Sample base = 2043

Six in ten contact lens wearers regard them as being very important in their day-to-day life (59%), with a further three in ten viewing them as quite important (30%). The remainder regard them as either not very important (9%) or not at all important (2%).

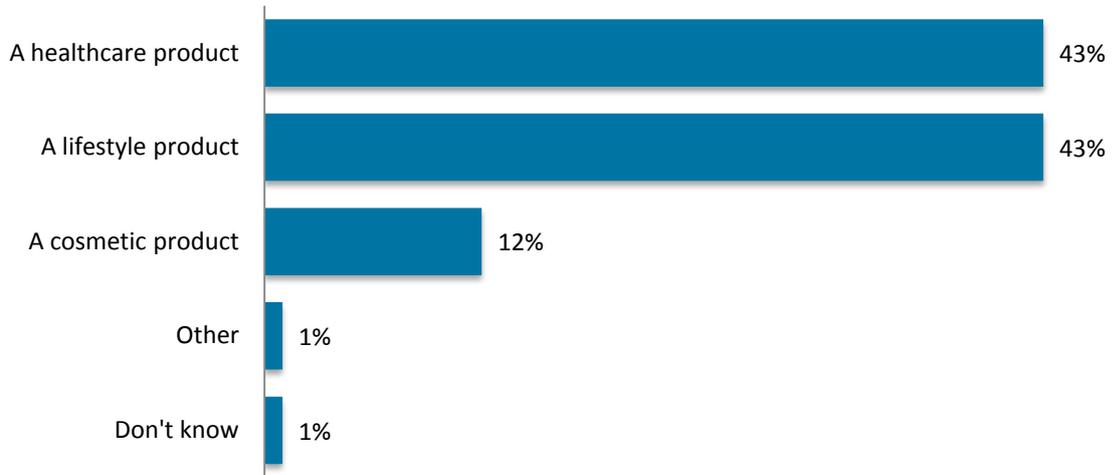
Figure 11: Importance of contact lenses in day to day life (all respondents)



A5. How important are contact lenses in your day-to-day life?
 Sample base = 2043

Most respondents view contact lenses either as a healthcare or lifestyle product (both 43%), while 12% view them as a cosmetic product.

Figure 12: Type of product contact lenses are seen as (all respondents)



A6. If you had to choose between the following options, what type of product do you see contact lenses as most?
 Sample base = 2043

Males, ABC1s and those without a disability are significantly more likely to view contact lenses as a healthcare product (48%, 46% and 45%, respectively), while females, C2DEs and those aged 35+ are more likely to view them as a lifestyle product (47%, 47% and 45%, respectively). Those with a disability and those aged under 35 are the most likely to view them as a cosmetic product (20% and 16%, respectively).

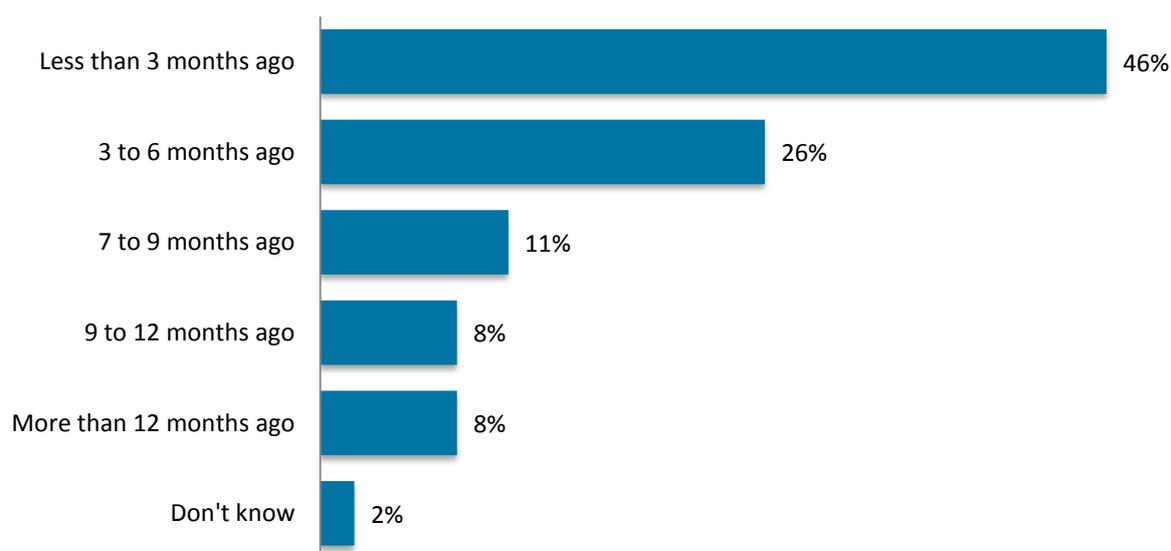
4 Purchasing behaviour

This chapter explores the purchasing behaviour of contact lens wearers, including when they last bought contact lenses, where they have ever bought them from, and where they buy them from most frequently, both in terms of in-store vs online and specific stores and websites. It also covers frequency of purchase, method of payment and how many months' supply are bought at a time. Reasons for buying in-store and online are then explored in detail. Finally, the chapter examines the extent to which consumers shop around for contact lenses and what proportion have used any websites or mobile applications to save money on contact lenses.

4.1 When contact lenses were last bought

Nine in ten respondents have bought contact lenses in the last 12 months (90%). Nearly half have bought them in the last 3 months (46%), a quarter bought them 3 to 6 months ago (26%) and a fifth between 7 to 12 months ago (19%). Just 8% bought their contact lenses more than 12 months ago.

Figure 13: When last bought contact lenses (all respondents)

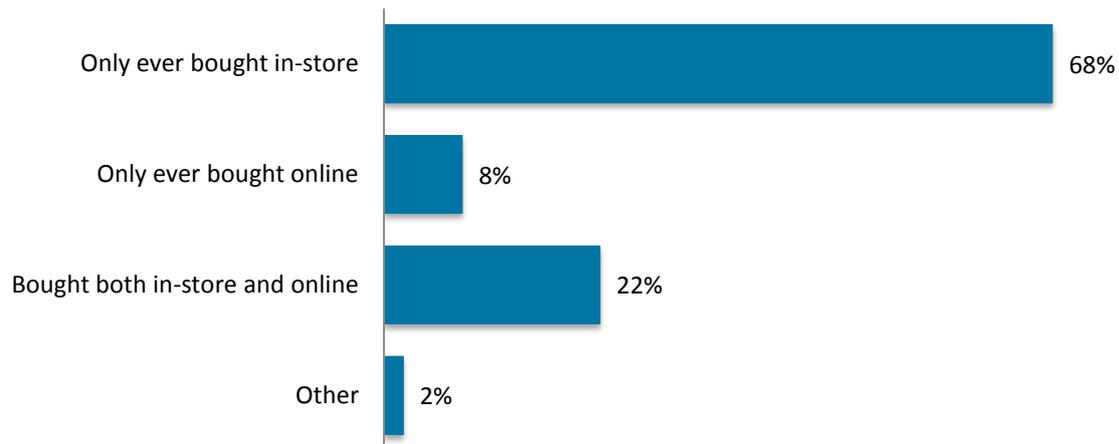


C1a. When did you last buy contact lenses?
Sample base = 2043

4.2 Where contact lenses have been bought from

Just over two thirds of respondents have only ever bought their contact lenses in-store (68%), while 8% have only ever bought online. Around a fifth have bought contact lenses both in-store and online (22%). Two per cent of respondents get their contact lenses via another method, including by mail order, from an eye hospital or from their employer.

Figure 14: Where contact lenses are bought (all respondents)



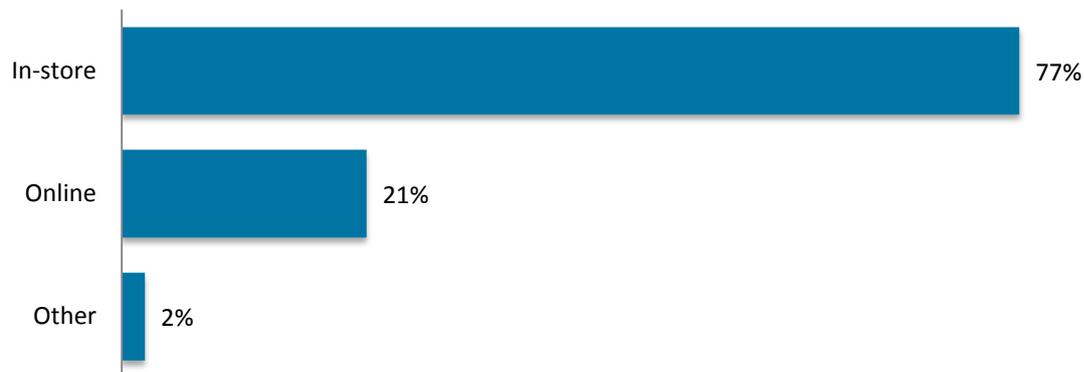
C1. Thinking about where you buy your contact lenses, which one of the following statements most applies to you?

Sample base = 2043

Those who have bought both in-store and online were asked where they most frequently buy their contact lenses from nowadays. Of these respondents, 59% most frequently buy online, while 41% most frequently buy in-store.

Overall, three quarters of contact lens wearers most frequently buy in-store (77%) and 21% most frequently buy online. Throughout the report, these groups will be referred to as those who primarily buy in-store and those who primarily buy online.

Figure 15: Where contact lenses are bought most frequently (all respondents)



C2. Where do you most frequently buy your contact lenses from nowadays?

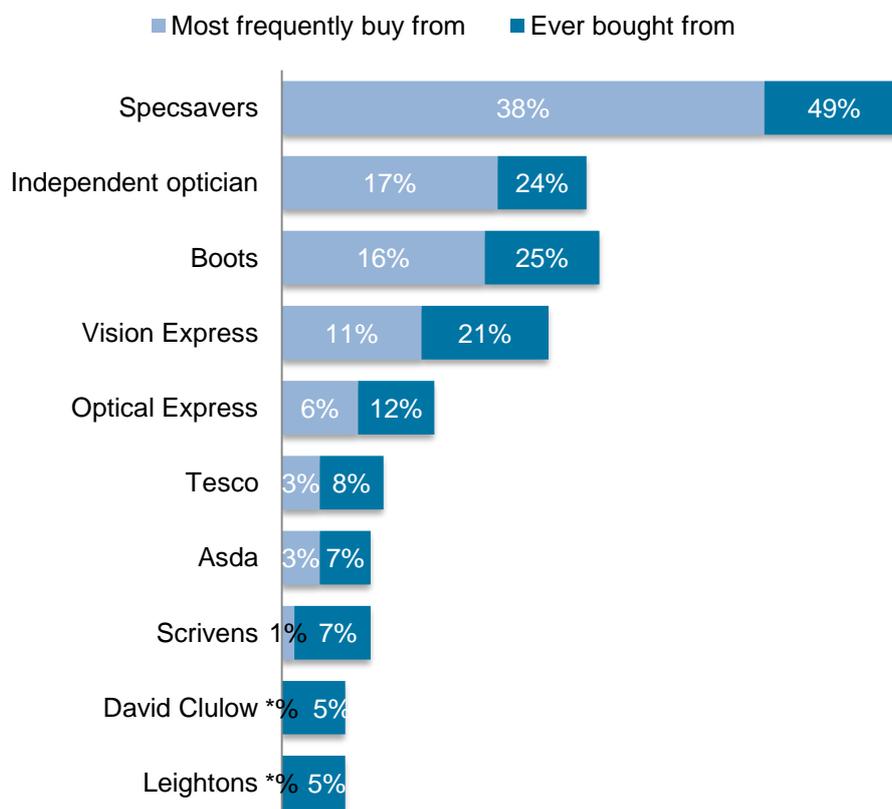
Sample base = 2043

Respondents were also asked which specific stores and/or websites they have ever bought their contact lenses from and, if more than one, which stores or websites they buy from most frequently. The results are summarised in the figures that follow.

Among those who primarily buy in-store, Specsavers is mentioned by the most respondents by far, with 49% of respondents most frequently buying their contact lenses there and 38% having ever done so. Independent opticians and Boots are the next most popular, with 17% and 16% of respondents, respectively, buying their

contact lenses from each of these most frequently. One in ten respondents most frequently buy from Vision Express (11%) and one in twenty from Optical Express (6%). Other stores are mentioned by relatively fewer respondents: Tesco (3%), Asda (3%), Scrivens (1%), David Clulow (<0.5%), Leightons (<0.5%).

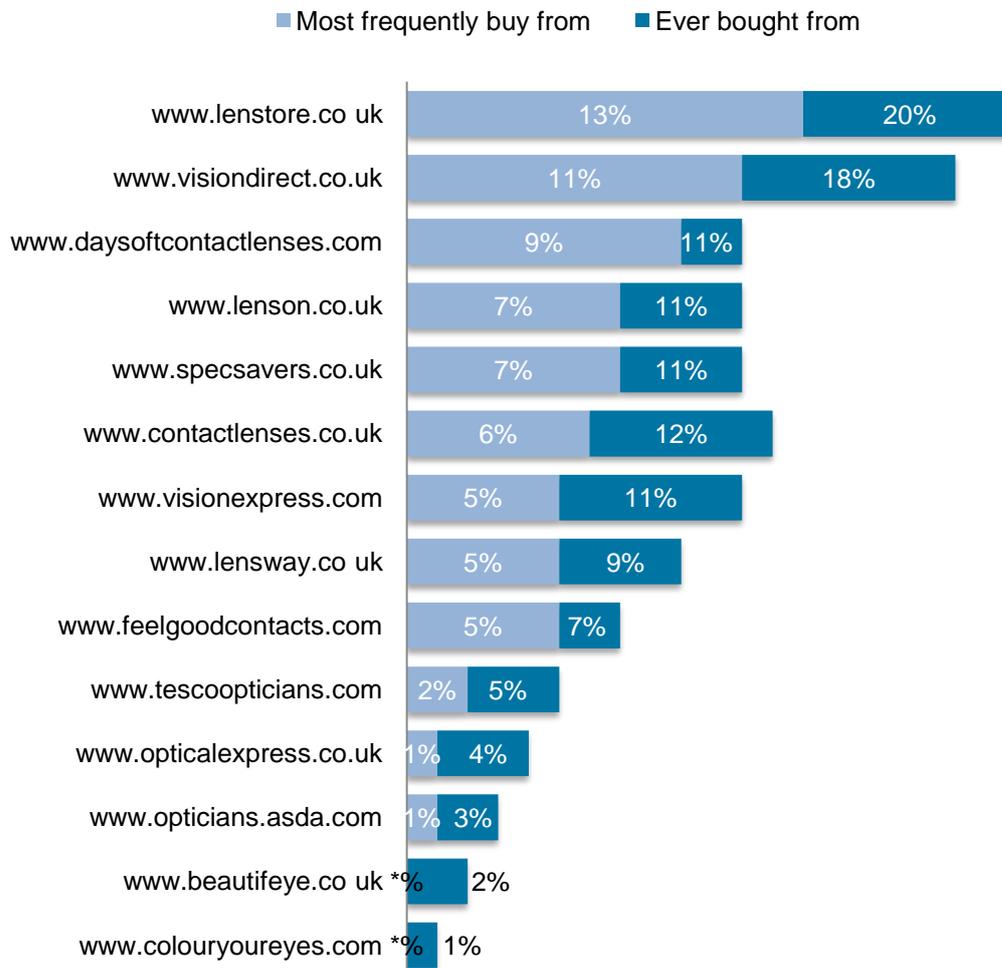
Figure 16: Which stores bought contact lenses from (those who primarily buy in-store)



C3. Which of the following stores have you ever bought contact lenses from?
 C4. And where do you most frequently buy contact lenses from?
 Sample base = 1576 *denotes less than 0.5%

In terms of websites used by those who primarily buy their contact lenses online, www.lenstore.co.uk is the most commonly used; 13% of respondents buy their contact lenses from here most frequently (20% have ever done so). This is followed by www.visiondirect.co.uk which is most frequently used by 11% of online buyers, and www.daysoftcontactlenses.com which is used most frequently by 9% of online buyers.

Figure 17: Which websites bought contact lenses from (those who primarily buy online)



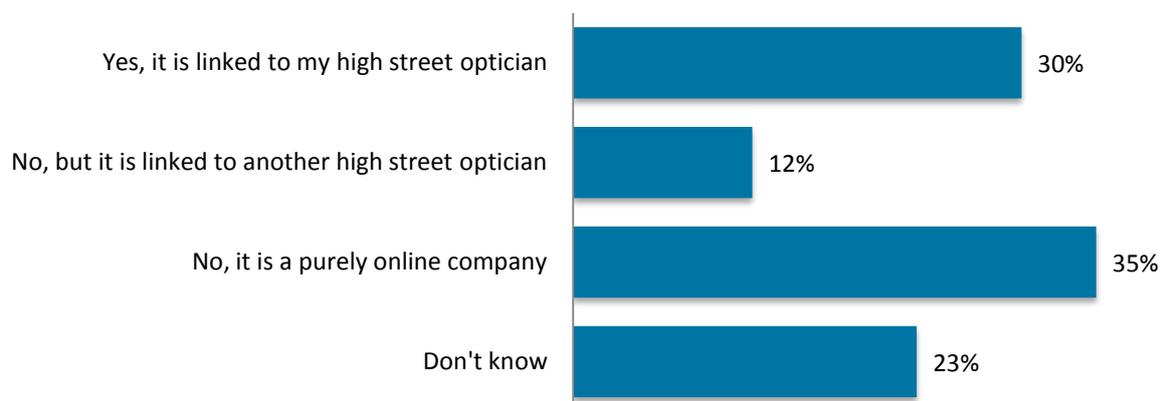
C3. Which of the following websites have you ever bought contact lenses from?

C4. And where do you most frequently buy contact lenses from?

Sample base = 432 *denotes less than 0.5%

Of those who primarily buy online, 30% say that the website is linked with their high street optician and a further 12% say it is linked to another high street optician. A third of respondents say that the website is a purely online company (35%), while a substantial proportion (23%) do not know whether it is linked with a high street optician.

Figure 18: Whether website has a link with a high street optician (those who primarily buy online, excluding those who only buy zero-powered contact lenses)



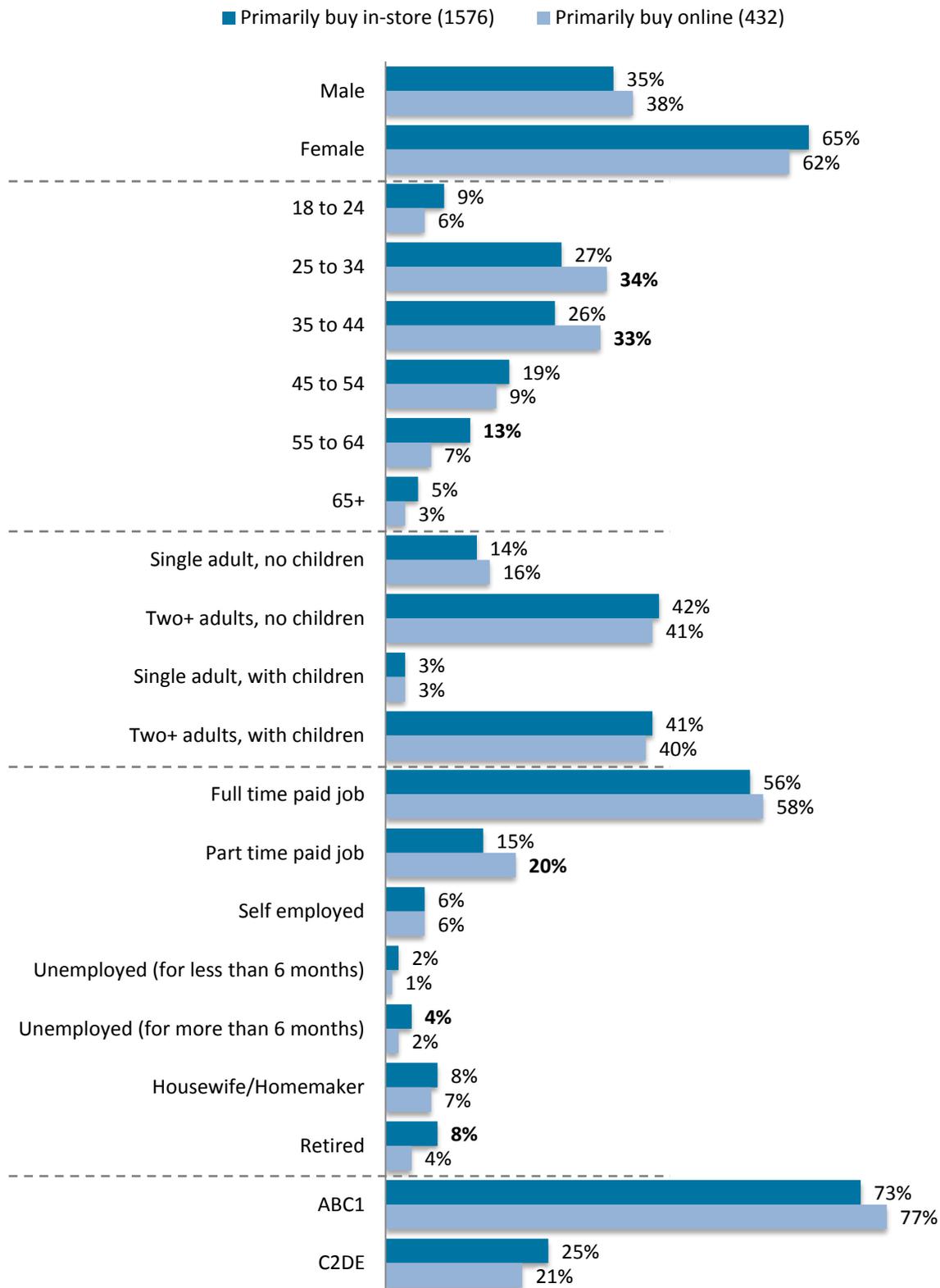
C11. Does [website] have a link with your high street optician?
Sample base = 430

4.2.1 Profile of in-store vs online buyers

Looking at the profile of those who primarily buy online compared to those who primarily buy in-store reveals a couple of significant differences:

- Online buyers are more likely to be aged between 25 and 44 (67% cf. 53% of in-store buyers), while in-store buyers are more likely to be aged 45 and over (37% cf. 19% of online buyers); and
- Online buyers are more likely to be in part-time employment (20% cf. 15% of in-store buyers), while in-store buyers are more likely to be retired (8% cf. 4% of online buyers) or long-term unemployed (4% cf. 2% of online buyers).

Figure 19: Profile of those who primarily buy in-store and online, by demographics (all respondents)



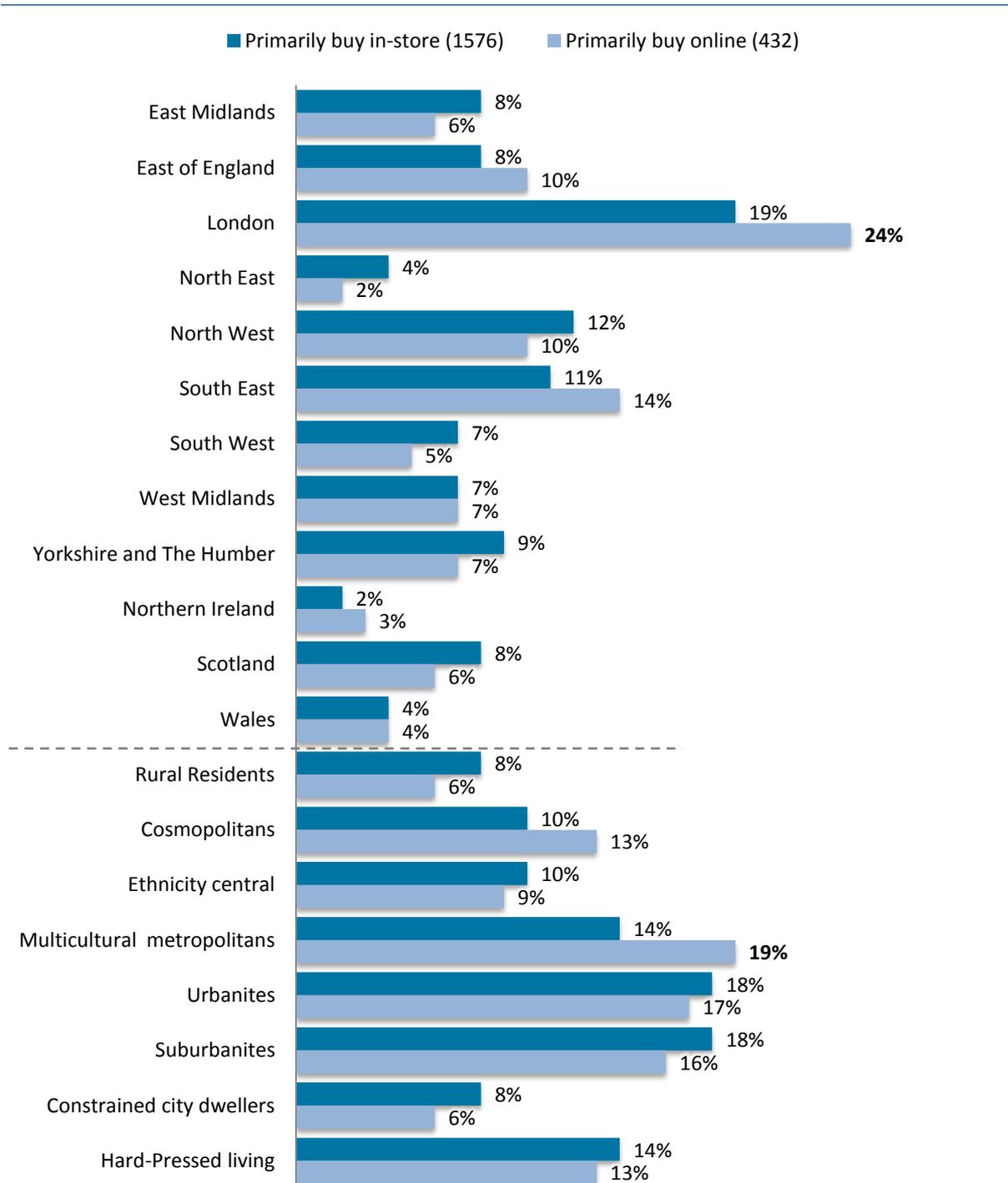
C1. Thinking about where you buy your contact lenses, which one of the following statements most applies to you?

Sample bases in parentheses

Figures in bold are statistically significantly higher than those who primarily buy in-store/online

By region, those who primarily buy their contact lenses online are more likely to live in London (24% cf. 19% of in-store buyers) and are also more likely to be classed as multicultural metropolitans (19%) compared to in-store buyers (14%).

Figure 20: Profile of those who primarily buy in-store and online, by region (all respondents)



C1. Thinking about where you buy your contact lenses, which one of the following statements most applies to you?

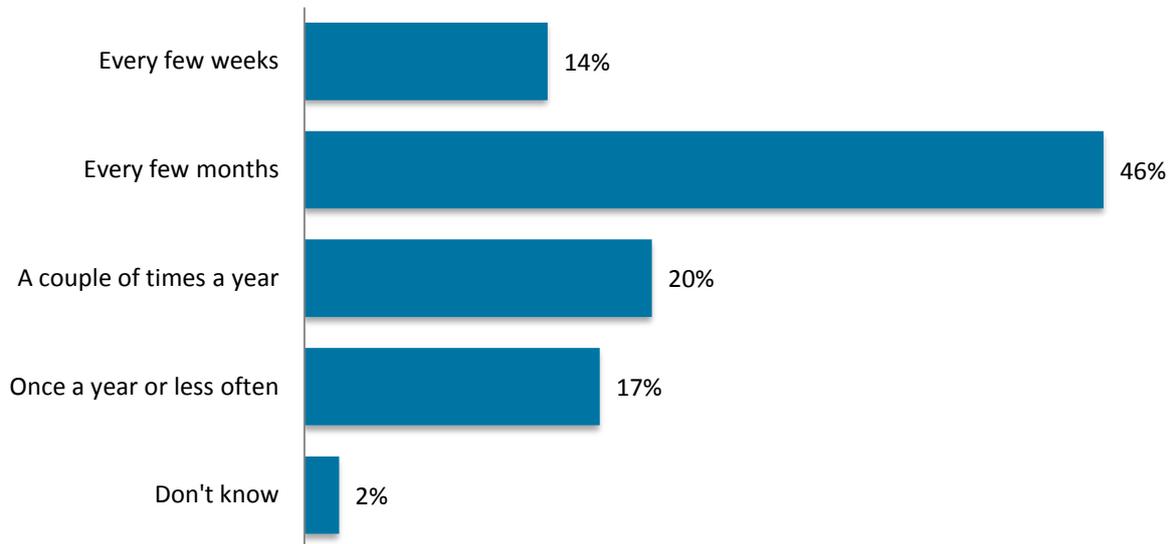
Sample bases in parentheses

Figures in bold are statistically significantly higher than those who primarily buy in-store/online

4.3 Frequency of purchase

Fourteen per cent of respondents buy contact lenses every few weeks, nearly half buy contact lenses every few months (46%), a fifth buy them a couple of times a year (20%) and 17% buy them once a year or less often.

Figure 21: Frequency of purchase (all respondents)



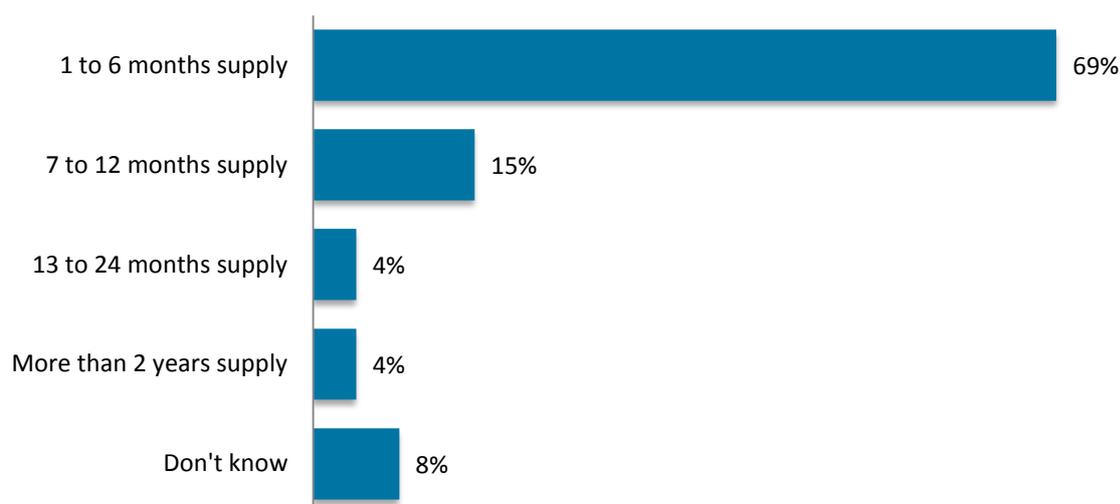
C6. How frequently do you buy contact lenses from [store/website]?
Sample base = 2043

4.4 Method of payment

Respondents were also asked what method of payment they used to buy their contact lenses. Half (49%) have regular payments set up (e.g. standing order, direct debit subscription), while the other half make one-off payments when needed (50%). The remaining 1% did not provide an answer.

Of those who make one-off payments, the majority typically order 1 to 6 months supply (69%), while 15% order 7 to 12 months supply and 8% order more than 12 months supply.

Figure 22: How many months supply bought (those who make one-off payments)



C8. How many months supply of contact lenses do you typically order when you make one-off purchases?
 Sample base = 1026

Contact lens wearers aged under 35 years old are significantly more likely to buy 1 to 6 months supply (76%) compared to those aged 55 and over (59%). Similarly, those who have worn contact lenses for 5 years or less are significantly more likely to buy 1 to 6 months supply (76%) compared to those who have been wearing them for more than 20 years (53%).

In terms of those who are more likely to order more than 12 months supply of contact lenses, there are relatively few significant differences by subgroup, however those who primarily buy in-store are significantly more likely to do so (9% cf. 2% of those who primarily buy online) as well as those who have worn contact lenses for more than 20 years (15% cf. 3% of those who have worn them for 5 years or less, 6% of those who have worn them for 6 to 20 years).

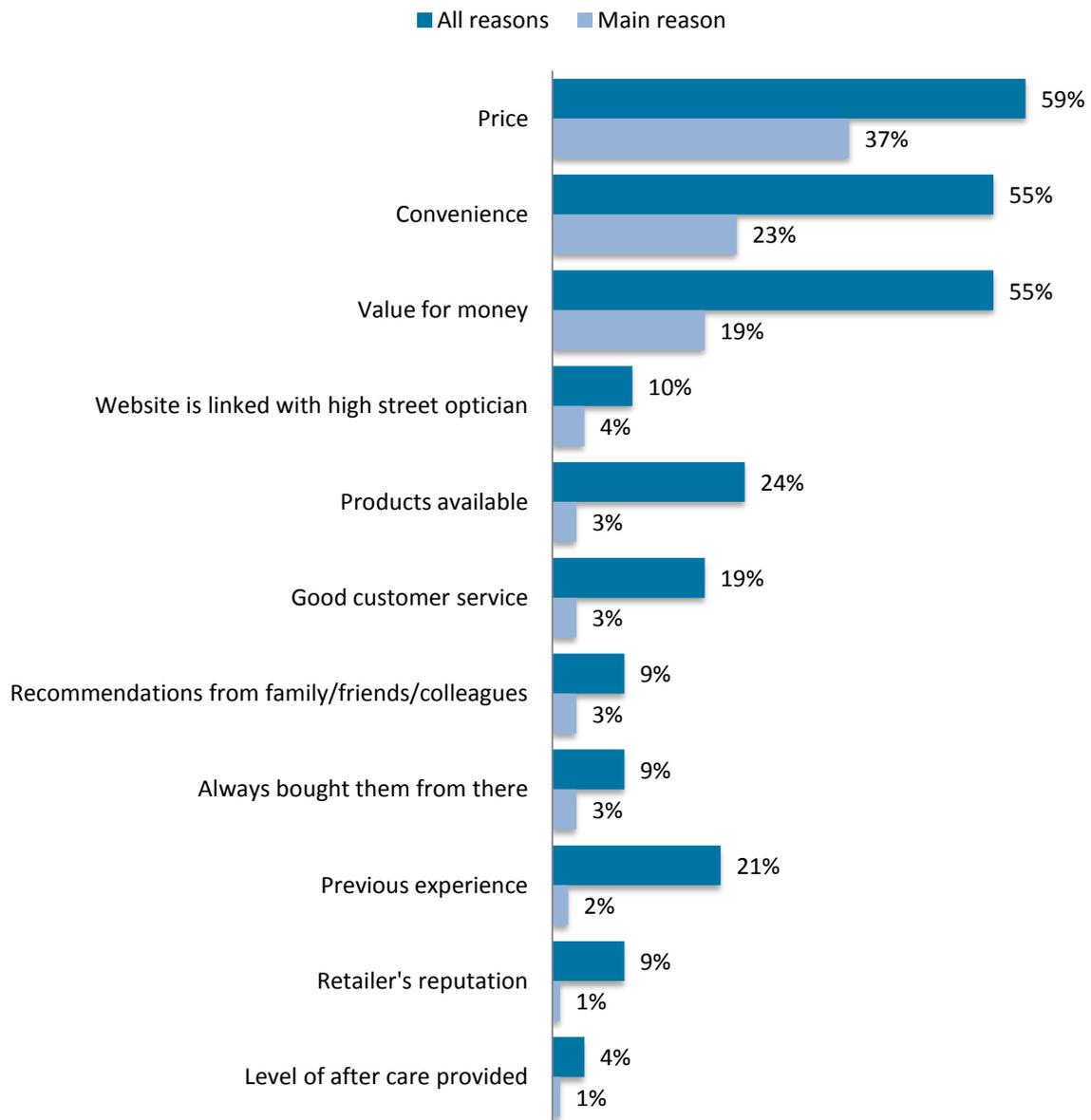
4.5 Reasons for buying online

Respondents who primarily buy their contact lenses online were asked their reasons for doing so and, where more than one reason was given, their main reason for choosing to buy online.

Over half of those who primarily buy online mention price (59%), convenience (55%) and value for money (55%), while significant proportions mention the available products (24%), their previous experience (21%) and good customer service (19%). Around one in ten give the following reasons: website is linked with high street optician (10%); recommendations from family/friends/colleagues (9%); always bought them from there (9%); and retailer’s reputation (9%). Very few respondents mention that the level of aftercare provided is a reason for buying online (4%).

In terms of the main reason for buying online, more than a third of contact lens wearers say it is due to price (37%), while a quarter say convenience (23%) and a fifth say value for money (19%).

Figure 23: Reasons for buying online (those who primarily buy online)



C9. Why do you choose to buy your contact lenses online?
 C10. What is the main reason you choose to buy your contact lenses online?
 Sample base = 432

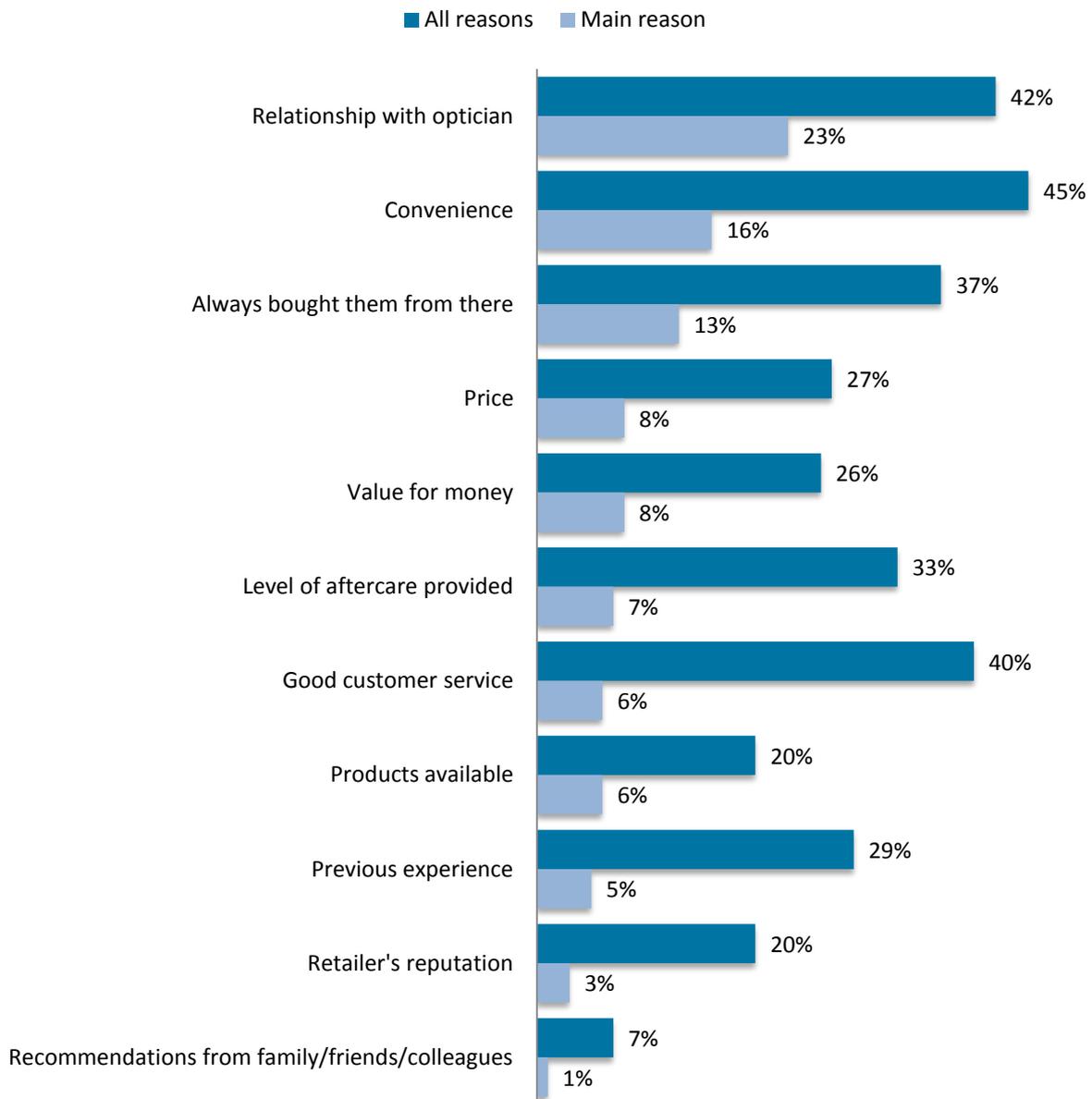
4.6 Reasons for buying in-store

Respondents who primarily buy their contact lenses in-store were asked their reasons for doing so and, where more than one reason was given, their main reason for choosing to buy in-store.

Around two fifths of those who primarily buy in-store mention convenience (45%), the relationship with the optician (42%), good customer service (40%) and that they have always bought them from there (37%). Significant proportions mention the level of aftercare provided (33%), their previous experience (29%), price (27%), value for money (26%), available products (20%) and the retailer's reputation (20%).

In terms of the main reason for buying in-store, nearly a quarter of contact lens wearers say it is due to the relationship with the optician (23%), while 16% say convenience and 13% say they have always bought them from there.

Figure 24: Reasons for buying in-store (those who primarily buy in-store)



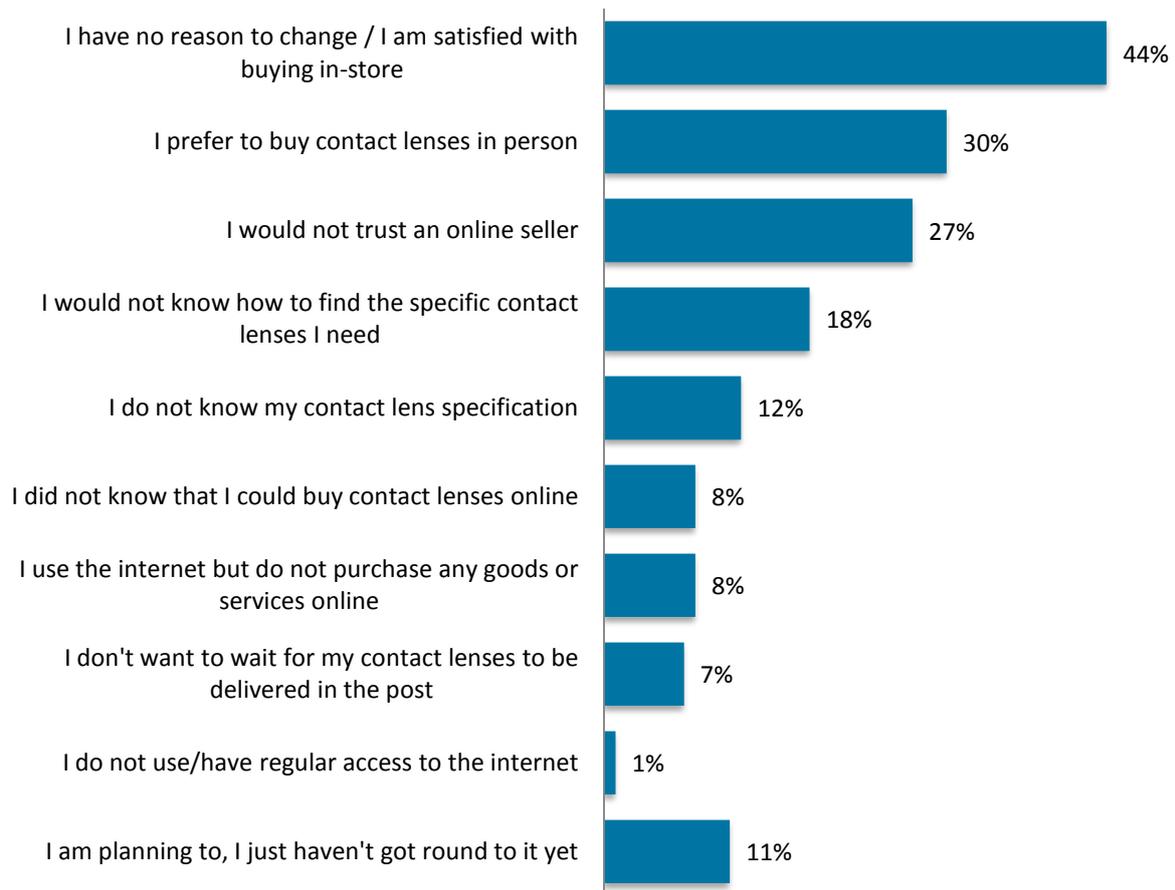
C14. Why do you choose to buy your contact lenses in-store?
 C15. What is the main reason you choose to buy your contact lenses in-store?
 Sample base = 1577

4.6.1 Reasons for never buying online

Around two thirds of respondents have never bought contact lenses online (68%) and were asked their reasons for this (respondents were able to select one or more reasons). Nearly half have no reason to change / are satisfied with buying in-store (44%), while three in ten prefer to buy contact lenses in person (30%) or would not trust an online seller (27%). A significant proportion have never bought online because

they would not know how to find the specific contact lenses they need (18%) or because they do not know their contact lens specification (12%). There are also some who did not know that they could buy contact lenses online (8%), who use the internet but do not buy anything online (8%) or do not want to wait for delivery (7%). One in ten are planning to buy contact lenses online at some point but have not done so yet (11%).

Figure 25: Reasons for never buying online (those who have never bought online)



C16. You said earlier that you have never bought contact lenses online. Why is this?
 Sample base = 1388

4.7 Purchase decision factors

In order to understand which factors are the most important and least important when consumers are deciding where to buy contact lenses from, a Max Diff (Maximum Difference) approach was used. Five attributes were included (price, convenience, good customer service, products available and retailer’s reputation) and respondents were shown four sets of four attributes at random and asked to indicate the ‘most important’ and the ‘least important’ attributes in each set, in order to obtain a relative ranking for each option. The results (calculated as Bayesian averages) are summarised in the following figure.

Overall, price is seen as the most important factor in choosing where to buy contact lenses. This is followed by good customer service and the retailer’s reputation, while convenience and the products available are seen as less important.

Figure 26: Purchase decision factors (all respondents)



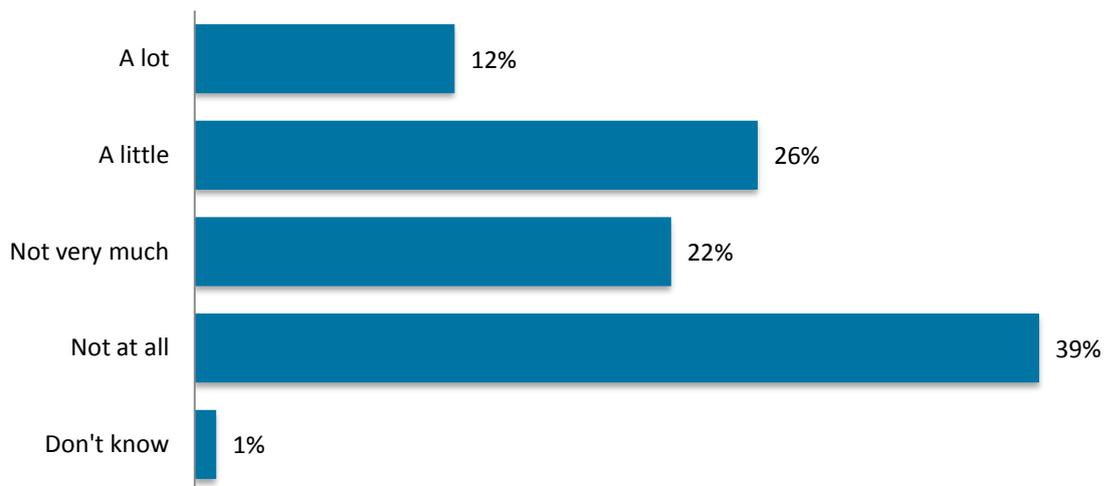
C18. Please indicate which of the following criteria you feel is the most important factor, and which you feel is the least important factor in deciding where to buy contact lenses from.
 Sample base = 2043

A number of differences are evident when analysing the results by subgroups. Compared to the average:

- Females are more likely to value reputation over customer service;
- Those aged under 35 are more likely to value reputation and convenience over customer service;
- Those aged 35 to 54 are more likely to value convenience over reputation;
- Those aged 55+ are more likely to value customer service over price (and are the only group not to rate price as the most important factor), and products available over convenience;
- C2DEs are more likely to value reputation over customer service, and products available over convenience;
- Those who buy their contact lenses online (either solely or primarily) are more likely to value convenience and products available over reputation and customer service; and
- Those who shop around for their contact lenses are more likely to value convenience and products available over reputation and customer service.

4.8 Extent to which consumers shop around

All respondents were asked to what extent they shop around for contact lenses. The majority of contact lens wearers do not shop around very much/at all (61%), while nearly two fifths shop around either a little or a lot (38%).

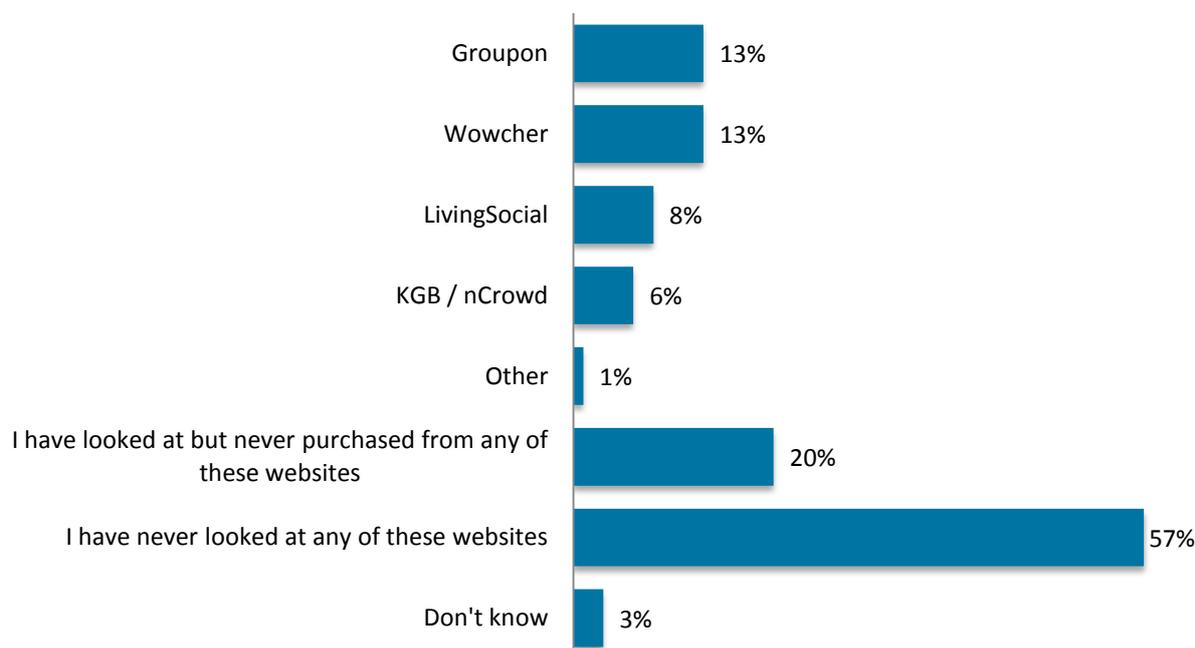
Figure 27: Extent to which shop around for contact lenses (all respondents)

C19. To what extent do you shop around for contact lenses?
Sample base = 2043

Those who view contact lenses as a cosmetic product are more likely to shop around a lot/a little (50%) compared to those who view them as a healthcare or lifestyle product (both 37%).

Respondents were also asked if they have ever used any specific websites or mobile applications to save money when buying contact lenses. One in five have used at least one (20%); specifically Groupon (13%), Wowcher (13%), LivingSocial (8%) and KGB/nCrowd (6%). A further fifth have looked at one or more of the websites when buying contact lenses but have never purchased from them (20%). However, the majority of contact lenses wearers have never looked at them (57%).

Figure 28: Whether used any websites/apps to save money on contact lenses (all respondents)

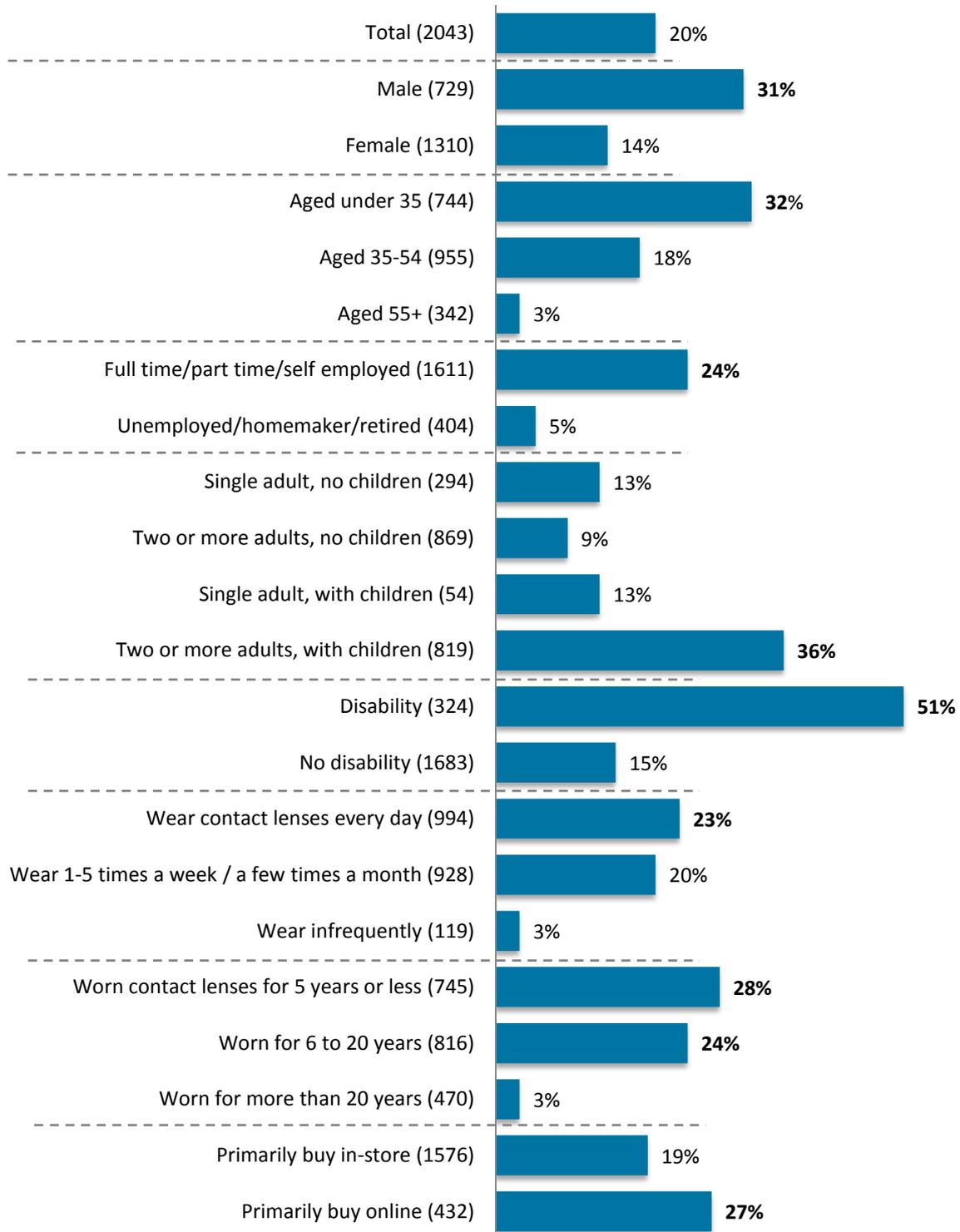


C20. Have you ever used any of the following websites or mobile applications to save money when buying contact lenses?
Sample base = 2043

A number of subgroups are significantly more likely to have used at least one of the websites or mobile applications to save money on their contact lenses:

- Males (31% cf. 14% of females);
- Those aged under 35 (32% cf. 18% of 35-54s and 3% of 55+s);
- Those in employment (24% cf. 5% of unemployed/retired);
- Those living with children and at least one other adult in the household (36%);
- Those with a disability (51% cf. 15% of those with no disability);
- Those who wear contact lenses every day (23%) or 1-5 times a week/a few times a month (20%) compared to those who wear them infrequently (3%);
- Those who have worn contact lenses for less than 20 years (28% among those who have worn them for 5 years or less, 24% among those who have worn them for 6 to 20 years, compared to 3% among those who have worn them for more than 20 years); and
- Those who primarily buy their contact lenses online (27% cf. 19% of in-store buyers).

Figure 29: Proportion that have used any websites/apps to save money on contact lenses, by subgroup (all respondents)



C20. Have you ever used any of the following websites or mobile applications to save money when buying contact lenses?

Sample bases in parentheses

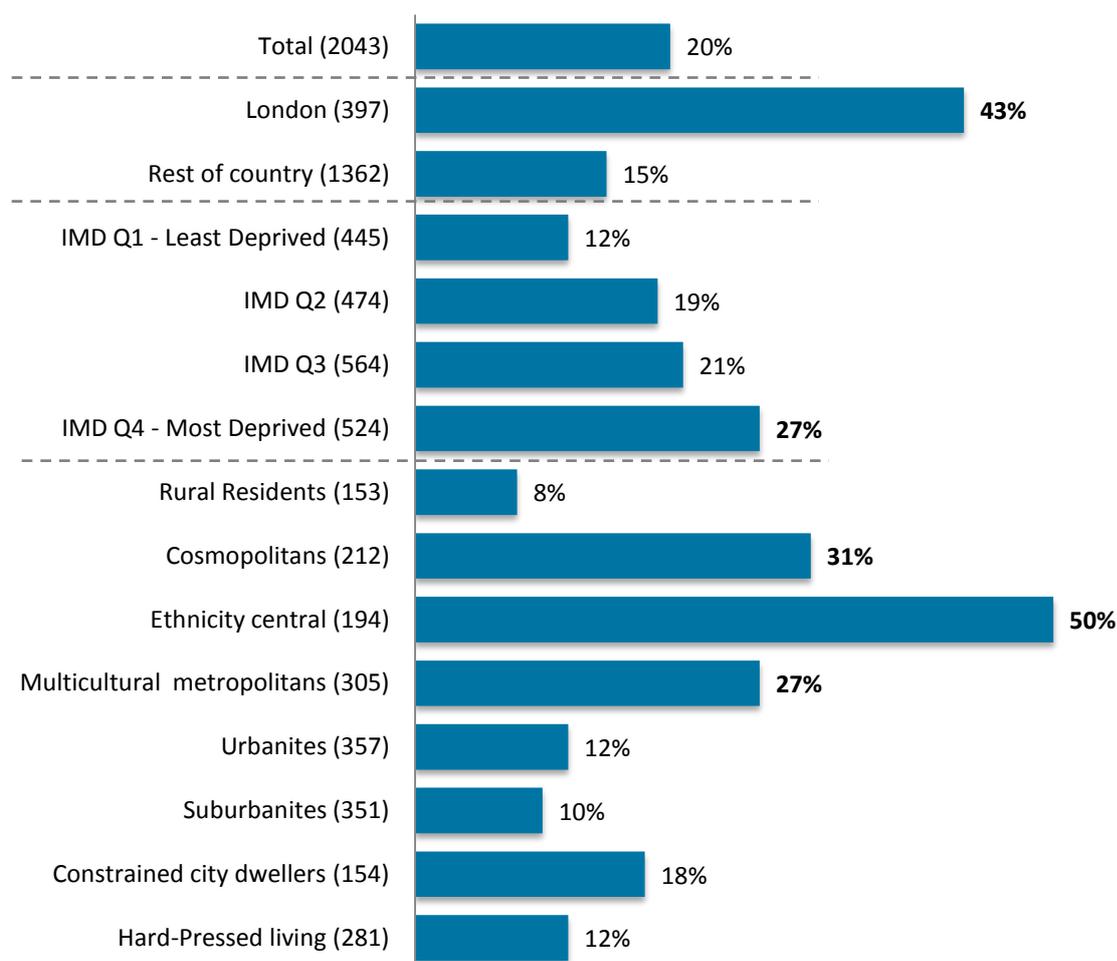
Note: In some instances subgroup base sizes may not add to the total sample size. For example, in the case of gender, 729 respondents are male, 1310 are female and 4 said they would “prefer not to say” and are therefore not included as a subgroup, hence why this adds to 2039 and not 2043. This applies throughout the report.

Figures in bold are statistically significantly higher than average (minus the sub-group tested)

By region, those living in London are significantly more likely to have used at least one of the websites or mobile applications to save money on their contact lenses (43% cf. 15% of those in the rest of the country). This proportion also increases by level of deprivation, from 12% of those in the least deprived quartile to 27% of those in the most deprived quartile.

By Output Area Classification, those living in ethnicity central or defined as cosmopolitans or multicultural metropolitans are significantly more likely to have used any of the websites or mobile applications (50%, 31% and 27%, respectively).

Figure 30: Proportion that have used any websites/apps to save money on contact lenses, by region (all respondents)



C20. Have you ever used any of the following websites or mobile applications to save money when buying contact lenses?

Sample bases in parentheses

Figures in bold are statistically significantly higher than average (minus the sub-group tested)

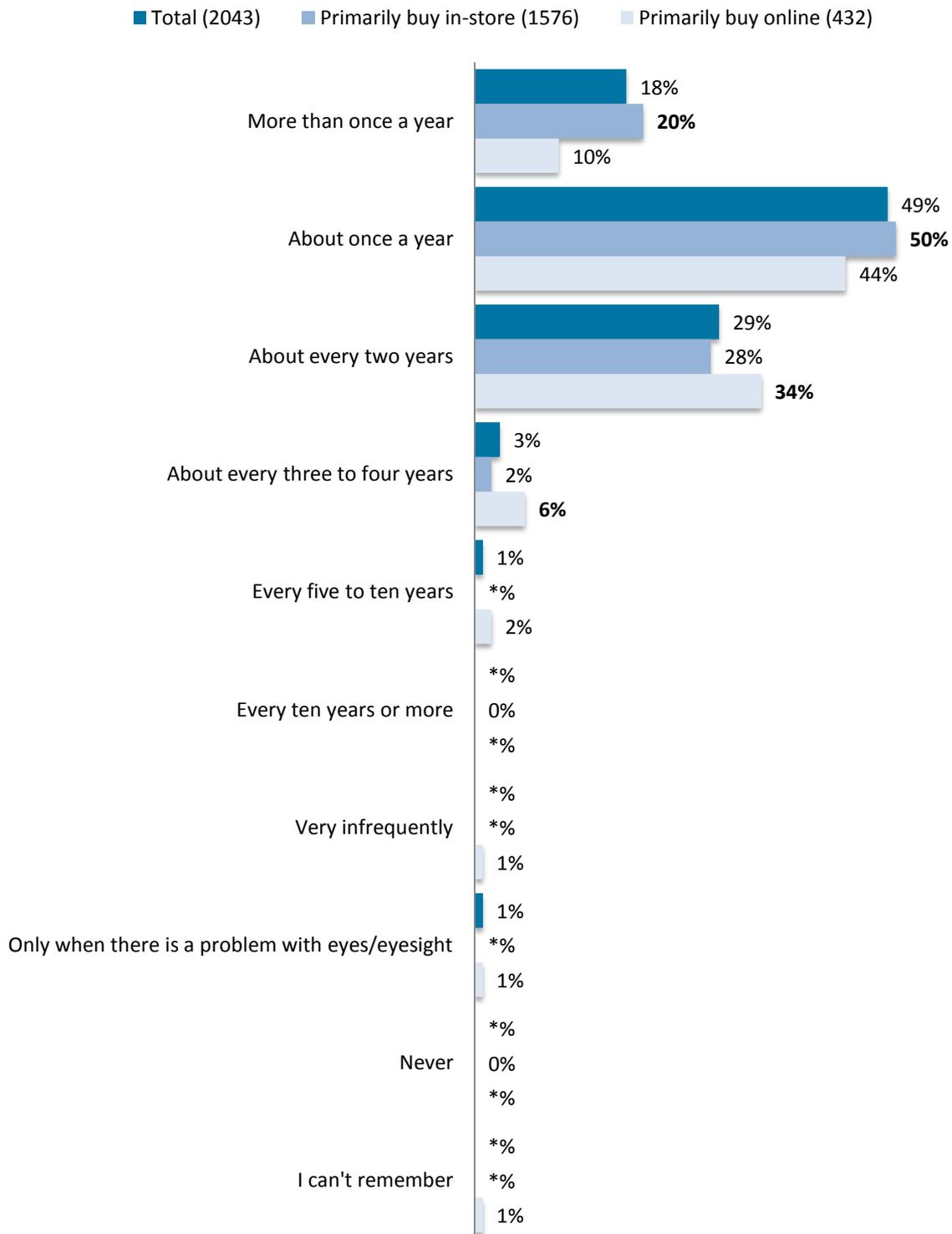
5 Eye tests and contact lens check-ups

The following section details the frequency of eye examinations (often described as sight tests) and contact lens check-ups, and where these have taken place. It also examines what proportion of consumers have a copy of their spectacles prescription and contact lens specification, and whether they have been informed of how often to have a contact lens check-up and, if so, how often. This section also covers whether those who buy online are required to provide their contact lens specification, and where ordering information is taken from if not.

5.1 Frequency and location of eye tests and contact lens check-ups

Around a fifth of contact lens wearers go for eye examinations/sight tests more than once a year (18%), half go about once a year (49%) and three in ten go about every two years (29%). Those who primarily buy their contact lenses in-store are significantly more likely to have more frequent eye tests (70% at least once a year) compared to those who primarily buy online (54%).

Figure 31: Frequency of eye tests (all respondents)

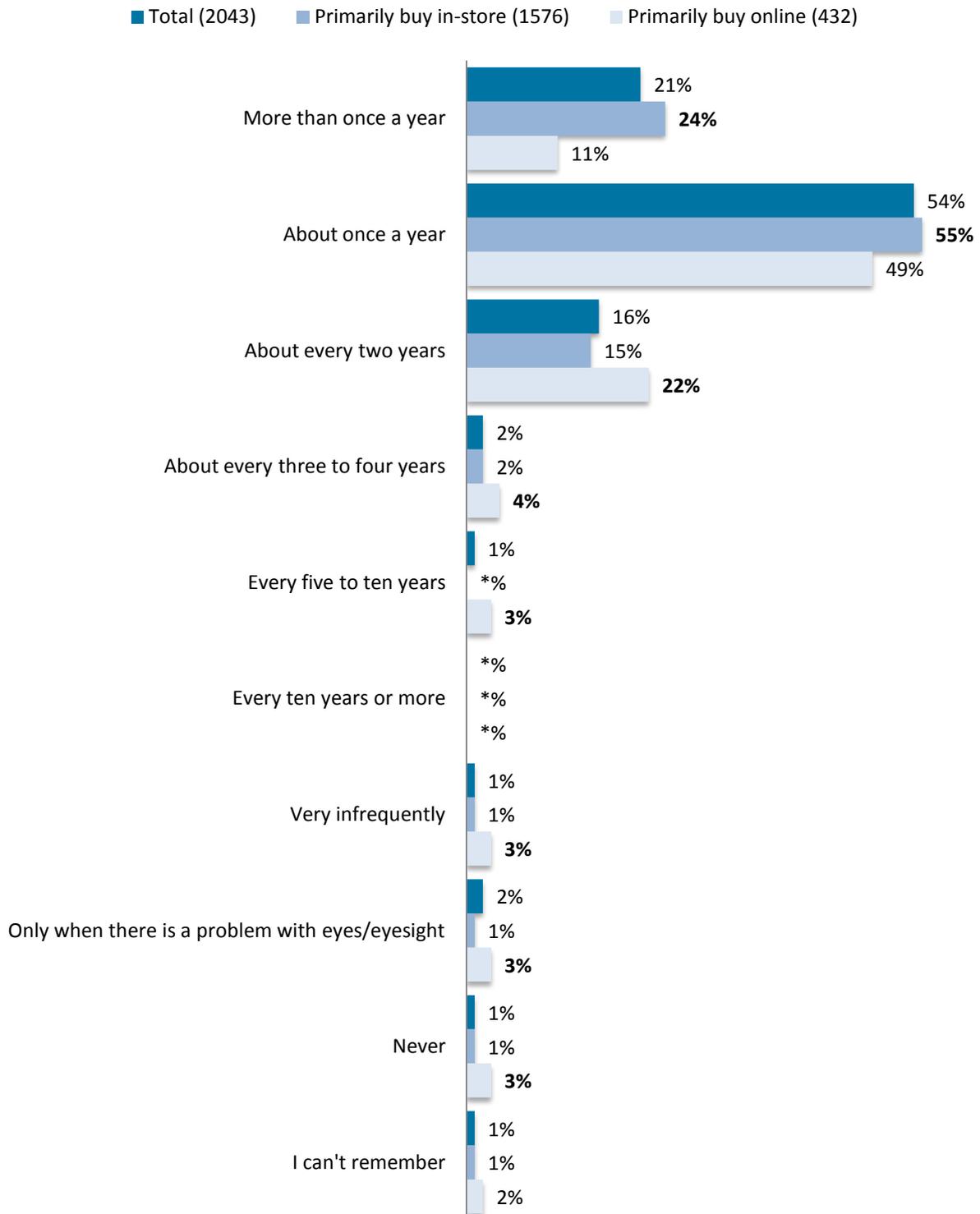


B1. How frequently do you go for eye examinations/sight tests?
 Sample bases in parentheses *denotes less than 0.5%
 Figures in bold are statistically significantly higher than those who primarily buy in-store/online

It is a similar picture when respondents were asked how frequently they go for contact lens check-ups; 21% go more than once a year, 54% go about once a year, and 16% go every two years. Again those who primarily buy their contact lenses in-store are

significantly more likely to have more frequent contact lens check-ups (79% at least once a year) compared to those who primarily buy online (60%).

Figure 32: Frequency of contact lens check-ups (all respondents)



B2. How frequently do you go for contact lens check-ups?

Sample bases in parentheses *denotes less than 0.5%

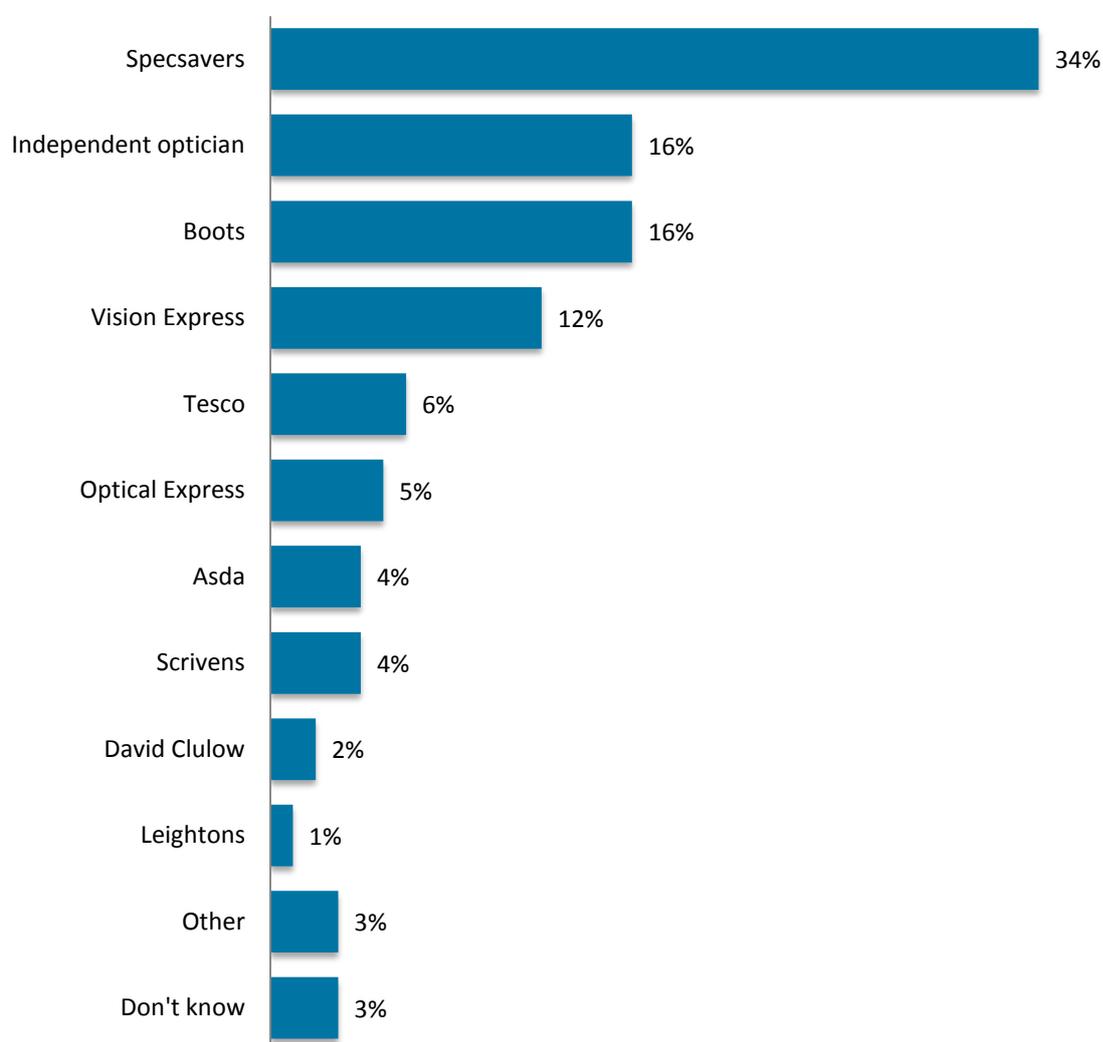
Figures in bold are statistically significantly higher than those who primarily buy in-store/online

Those who view contact lenses as a cosmetic product are less likely to go for contact lens check-ups at least once a year (65%) compared to those who view them as a healthcare product (76%) or a lifestyle product (77%).

Respondents were asked where their most recent eye test and contact lens check-up took place. The vast majority said that they took place at the same opticians (93%), either at the same time (67%) or at different times (26%). Just 4% had their eye test and contact lens check-up carried out at different opticians.

Specsavers was the most commonly mentioned opticians, with a third of the sample having had their most recent eye test and/or contact lens check-up there (34%). This is followed by independent opticians (16%), Boots (16%) and Vision Express (12%).

Figure 33: Where most recent eye test / contact lens check-up took place (those who have ever had an eye test or contact lens check-up)



B4. Where did you have your most recent eye test / contact lens check-up?
 Sample base = 2037

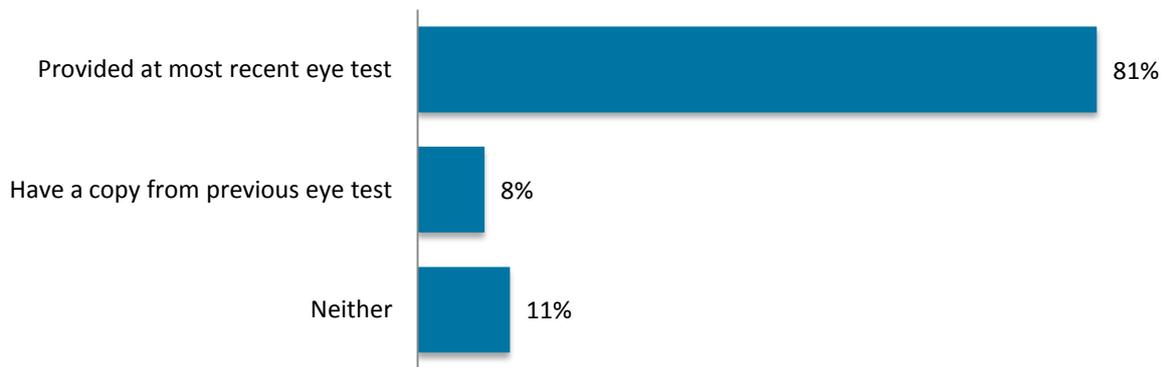
5.2 Contact lens specification

5.2.1 Proportion that have a copy of their spectacles prescription

Respondents were asked whether they were provided with their spectacles prescription at their most recent eye test, and were provided with an example of what the document looks like in case of any uncertainty (see Appendix 3).

Four fifths of respondents were provided with their spectacles prescription at their most recent eye test (81%), while 8% were not but have a copy from a previous test. The remaining 11% do not have their spectacles prescription.

Figure 34: Whether have spectacles prescription (all respondents)



B5a. Thinking about your most recent eye examination/sight test, were you provided with your spectacles/glasses prescription?

B6a. Do you have a copy of your spectacles/glasses prescription from previous tests?

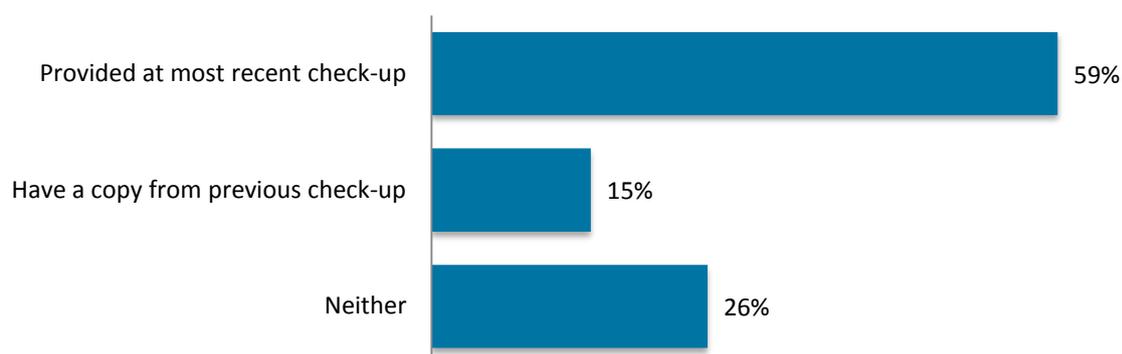
Sample base = 2043

5.2.2 Proportion that have a copy of their contact lens specification

The same question was asked in relation to contact lens specifications, and again respondents were provided with an example of what the document looks like (see Appendix 3).

In this case a smaller proportion, six in ten, were provided with their contact lens specification at their most recent check-up (59%), while 15% were not but have a copy from a previous check-up. The remaining 26% do not have their contact lens specification.

Figure 35: Whether have contact lens specification (all respondents)



B5b. Thinking about your most recent contact lens check-up, were you provided with your contact lens specification?

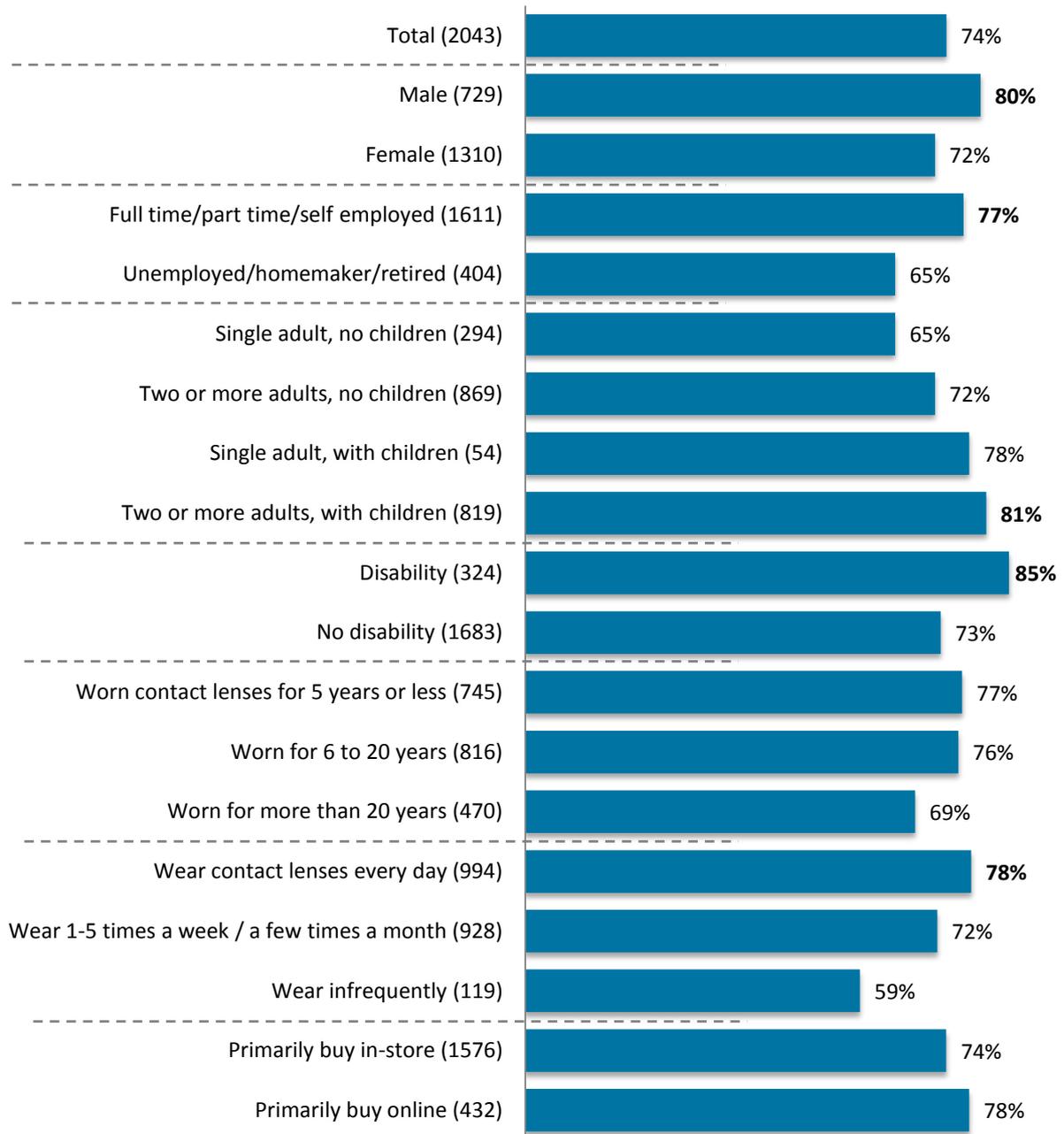
B6. Do you have a copy of your contact lens specification from previous check-ups?

Sample base = 2043

A number of subgroups are significantly more likely to have a copy of their contact lens specification:

- Males (80% cf. 72% of females);
- Those in employment (77% cf. 65% of unemployed/retired);
- Those living with children and at least one other adult in the household (81%);
- Those with a disability (85% cf. 73% of those with no disability);
- Those who have worn contact lenses for 20 years or less (77% among those who have worn them for 5 years or less, 78% among those who have worn them for 6 to 20 years, compared to 69% among those who have worn them for more than 20 years); and
- Those who wear contact lenses every day (78%) or 1-5 times a week/a few times a month (72%) compared to those who wear them infrequently (59%).

Figure 36: Proportion that have contact lens specification (all respondents)



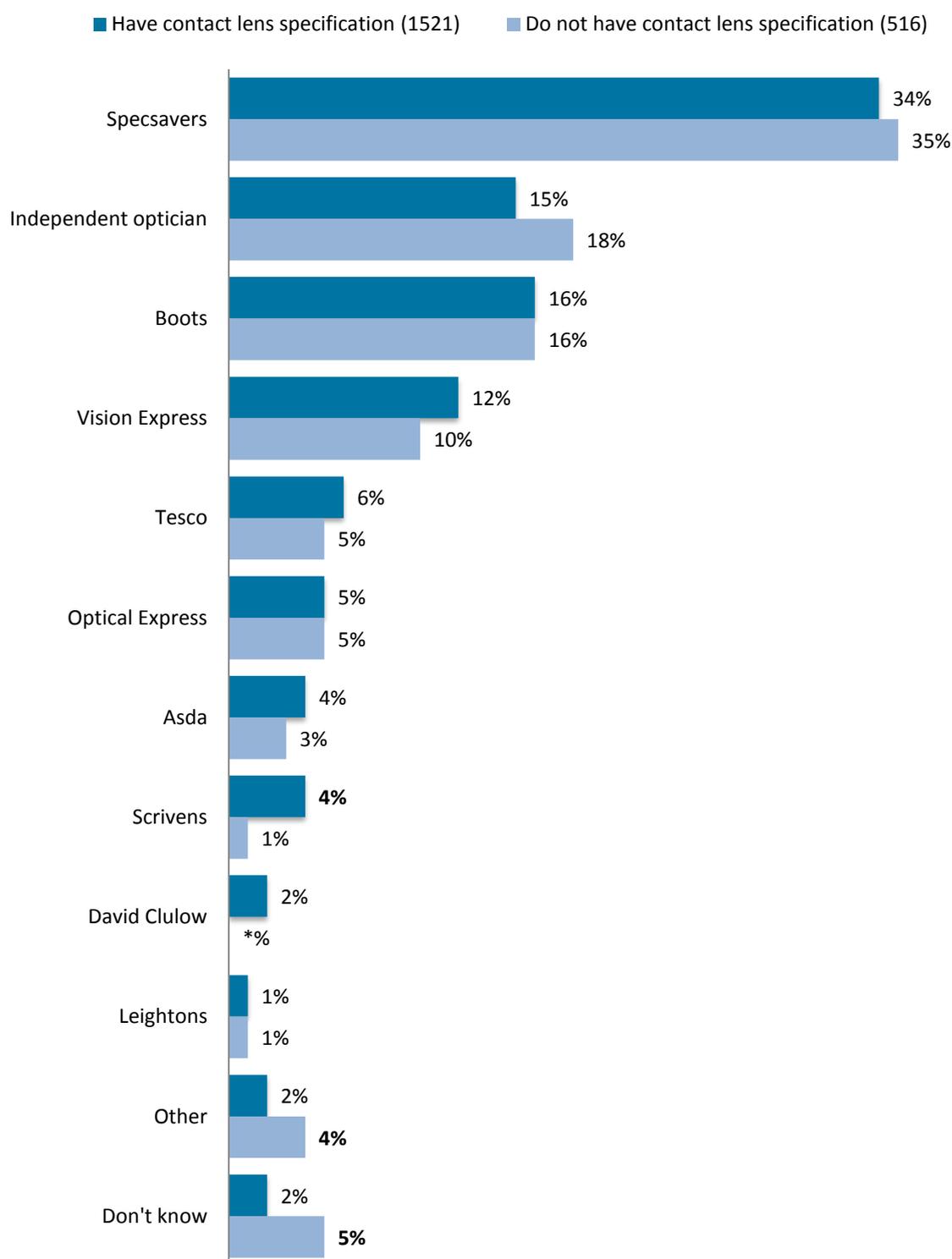
B5b. Thinking about your most recent contact lens check-up, were you provided with your contact lens specification?

B6. Do you have a copy of your contact lens specification from previous check-ups?

Sample bases in parentheses

Figures in bold are statistically significantly higher than average (minus the sub-group tested)

Figure 37: Where most recent eye test / contact lens check-up took place, by those who do/do not have a copy of their contact lens specification (those who have ever had an eye test or contact lens check-up)



B4. Where did you have your most recent eye test / contact lens check-up?

Sample bases in parentheses *denotes less than 0.5%

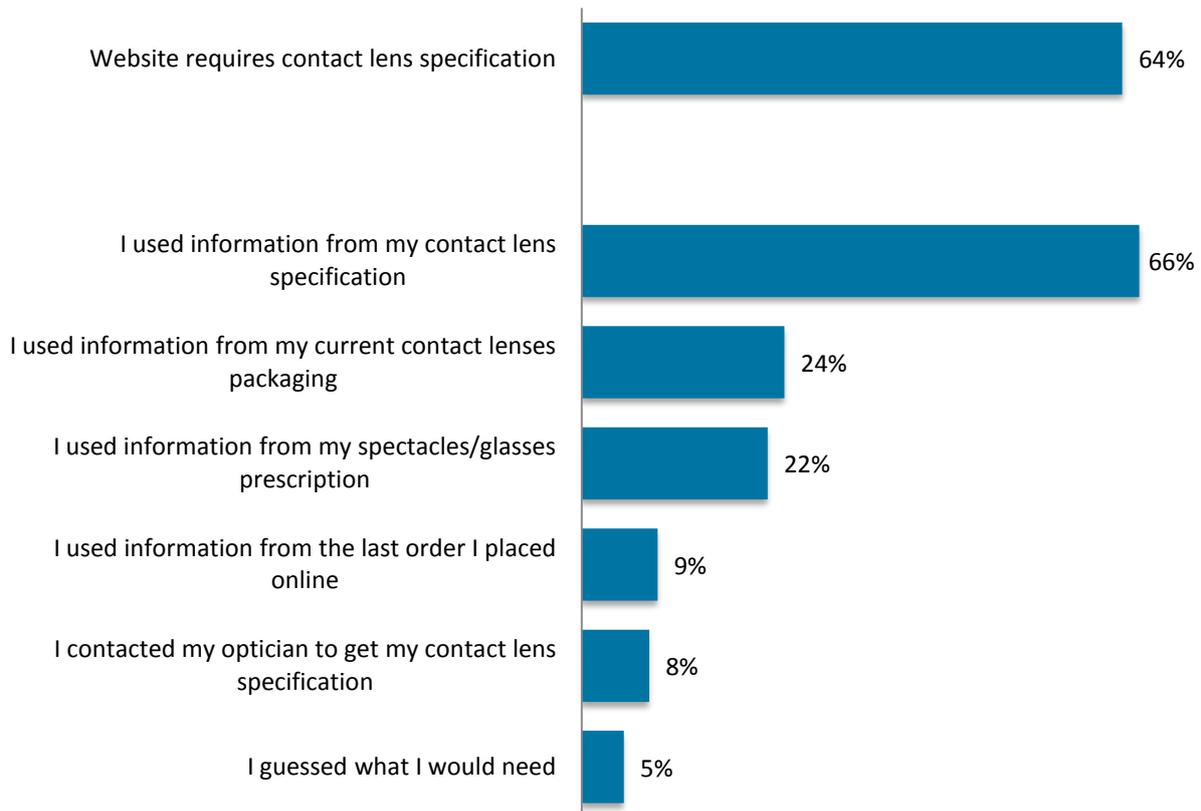
Figures in bold are statistically significantly higher than average (minus the sub-group tested)

5.2.3 Requirement to provide contact lens specification when buying online

Respondents who primarily buy online were also asked whether the website they use most frequently requires them to provide their contact lens specification in order to make a purchase. Around two thirds said that the website did require their contact lens specification (64%), while a quarter said it was not required (24%). The remainder (13%) could not recall.

Of the respondents who said the website did require their contact lens specification, two thirds used the information from their specification (66%) in order to complete the purchase. Just under a quarter of respondents used information from their current contact lenses packaging (24%) or from their spectacles prescription (22%), while fewer took it from their last order (9%) or contacted their optician to get their contact lens specification (8%). One in twenty guessed what they would need (5%).

Figure 38: Whether website requires contact lens specification (those who primarily buy online) and how they knew which contact lenses to order (those who primarily buy online and website requires contact lens specification)



Base = C13a. Does [website] require you to provide your contact lens specification in order to buy contact lenses? = Yes

Sample base = 432 (those who primarily buy online)

C13b. How did you know what contact lenses to order?

Sample base = 276 (those who buy online and website requires contact lens specification)

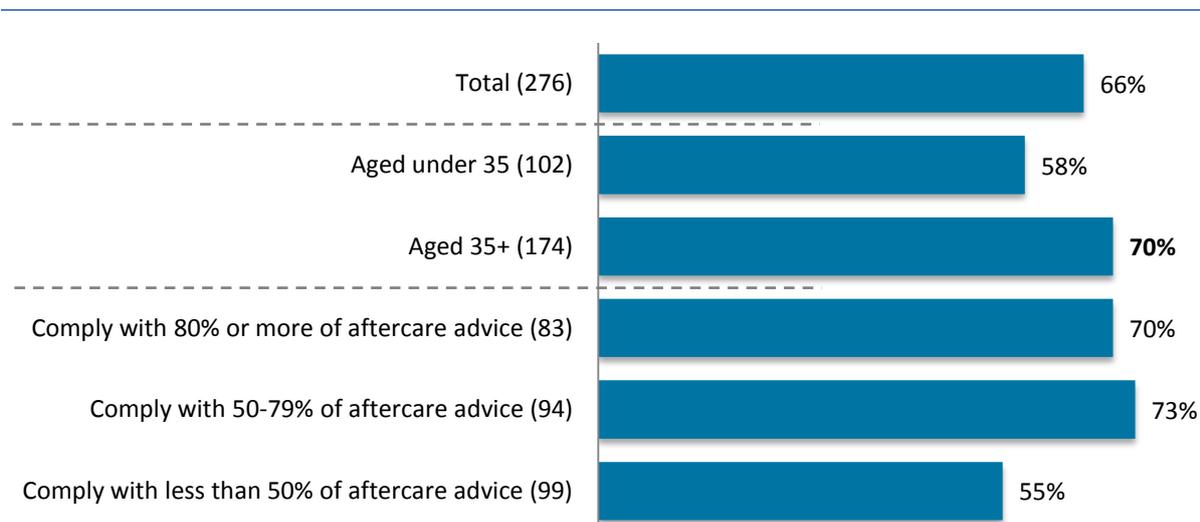
Note: Percentages may not add to 100% as question a multi-choice design

Among those who do *not* have a copy of their contact lens specification from their most recent contact lens check-up or a previous check-up, 35% still claim to have used information from their contact lens specification in order to complete their order. This could be due to respondents having their contact lens specification at the time of

completing the order, but having since discarded or lost it (and therefore not having a copy at the time of the survey). A further third used information from their spectacles prescription (35%) and another third from their current contact lens packaging (31%). One in eight used information from the last order they placed (12%), while 6% contacted their optician to get their contact lens specification and 6% guessed what they would need.

As shown in the following figure, those aged 35 or over are significantly more likely to have used their specification (70%) compared to those aged under 35 (58%). In addition, those who comply with at least 50% of the aftercare advice provided by the BCLA are significantly more likely to have used their contact lens specification than those who comply with less than 50% of the advice.

Figure 39: Proportion that used contact lens specification when ordering online (those who primarily buy online and website requires contact lens specification)



C13b. How did you know what contact lenses to order?

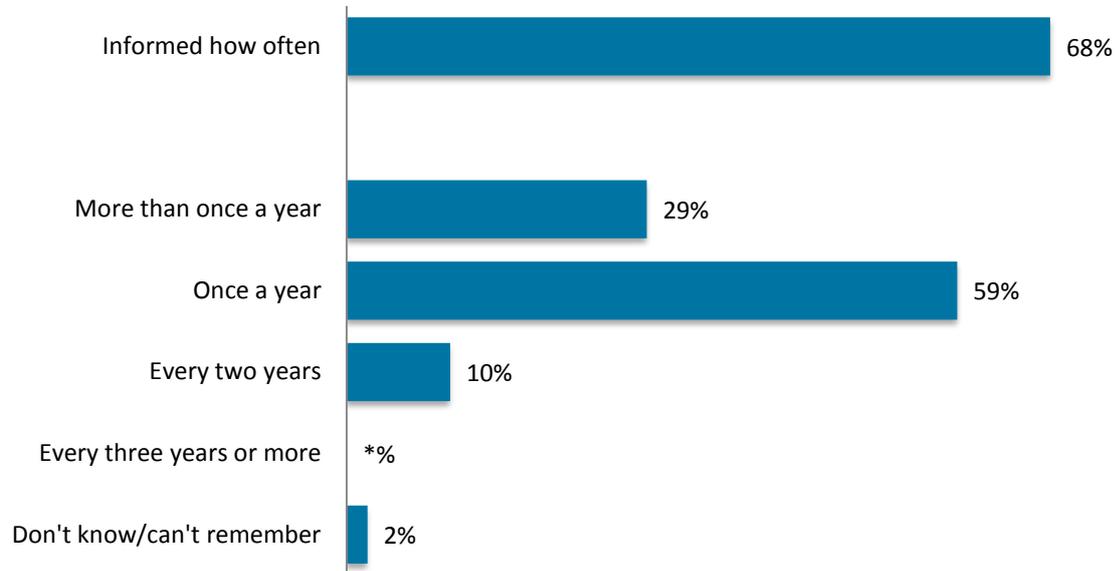
Sample bases in parentheses

Figures in bold are statistically significantly higher than average (minus the sub-group tested)

5.2.4 Whether optician informed how often to have specification checked

Of those who have had a contact lens check-up (98% of the sample), two thirds were informed how often they should go for contact lens check-ups by their optician (68%). Of this group, 29% were advised to have one more than once a year, 59% were advised to have a check-up once a year, 10% were advised every two years and the remainder could not recall (2%).

Figure 40: Whether been informed how often to have contact lens check-up (those who have ever had a contact lens check-up) and, if so, how often (those who have ever had a contact lens check-up and were informed how often this should take place)



B7. Have you been informed by your optician how often you should go for contact lens check-ups?

Sample base = 2001 (those who have ever had a contact lens check-up)

B7a. How often did your optician advise that you should have contact lens check-ups?

Sample base = 1370 (those who have ever had a contact-lens check-up and were informed how often this should take place) *denotes less than 0.5%

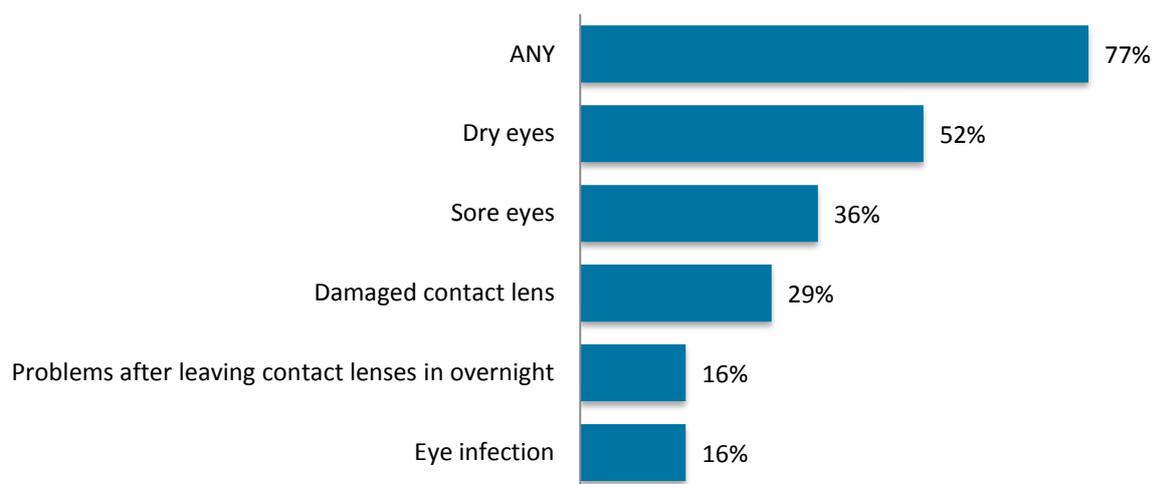
6 Aftercare advice

This chapter of the report begins by detailing the proportion of consumers who have experienced any problems in relation to their contact lenses, before moving on to look at how many were provided with aftercare advice at their most recent contact lens check-up. Those who did receive advice were asked how useful this was, while those who did not were asked whether they would have liked more advice. The chapter then examines awareness and compliance with key points of the aftercare advice provided by the BCLA.

6.1 Problems experienced in relation to contact lens wear

Just over three quarters of respondents have experienced at least one problem in relation to wearing their contact lenses at some point (77%). This is most commonly dry eyes (52%), followed by sore eyes (36%) and damaged contact lens (29%). A smaller proportion of respondents report having problems after leaving their contact lenses in overnight or having an eye infection (both 16%).

Figure 41: Whether ever experienced any problems with contact lenses (all respondents)



B9a. Have you ever experienced any of the following in relation to wearing your contact lenses?
Sample base = 2043

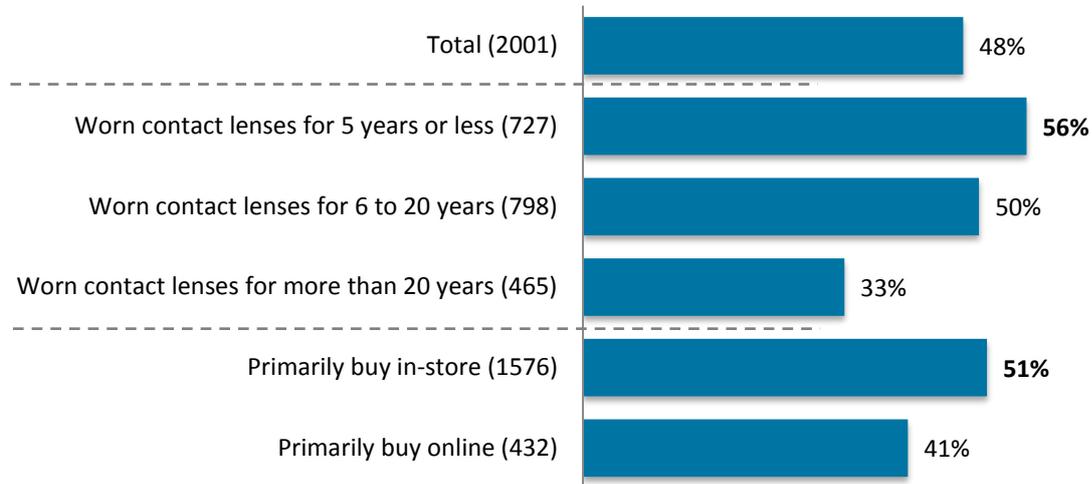
6.2 Provision of aftercare advice

Around half of respondents who have had a contact lens check-up were provided with advice on how to wear and look after their contact lenses (i.e. aftercare advice) at their most recent check-up (48%). The other half were either not provided with any advice (35%) or could not recall (17%).

Those who have been wearing contact lenses for more than 20 years are significantly less likely to have been provided with aftercare advice (33%) compared to those who have worn them for 5 years or less (56%) or 6 to 20 years (50%). Those who primarily buy their contact lenses in-store are also significantly more likely to have been

provided with aftercare advice at their most recent check-up compared to those who primarily buy online (51% cf. 41%).

Figure 42: Proportion that were provided with aftercare advice at most recent contact lens check-up (those who have ever had a contact lens check-up)



B5b. Thinking about your most recent contact lens check-up, were you provided with advice on how to wear and look after your contact lenses (i.e. aftercare advice)?

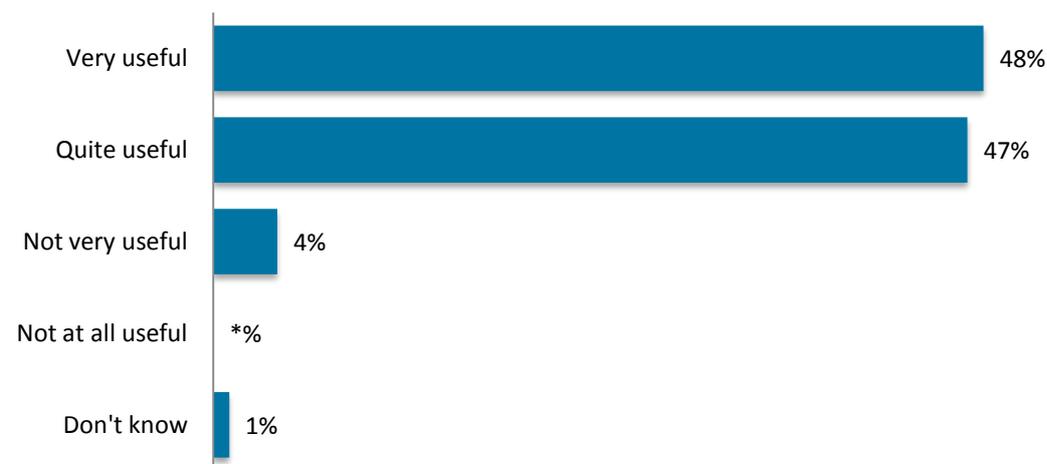
Sample bases in parentheses

Figures in bold are statistically significantly higher than average (minus the sub-group tested)

6.3 Usefulness of aftercare advice

Those who were provided with aftercare advice at their most recent contact lens check-up were asked how useful they found the advice. The vast majority found the advice either very useful (48%) or quite useful (47%). Just 4% said the advice was not very/at all useful.

Figure 43: Usefulness of aftercare advice (those who were provided with aftercare advice at most recent contact lens check-up)



B8. You said that you were provided with advice on how to wear and look after your contact lenses (i.e. aftercare advice) following your most recent contact lens check-up. How useful did you find this advice?

Sample base = 968

*denotes less than 0.5%

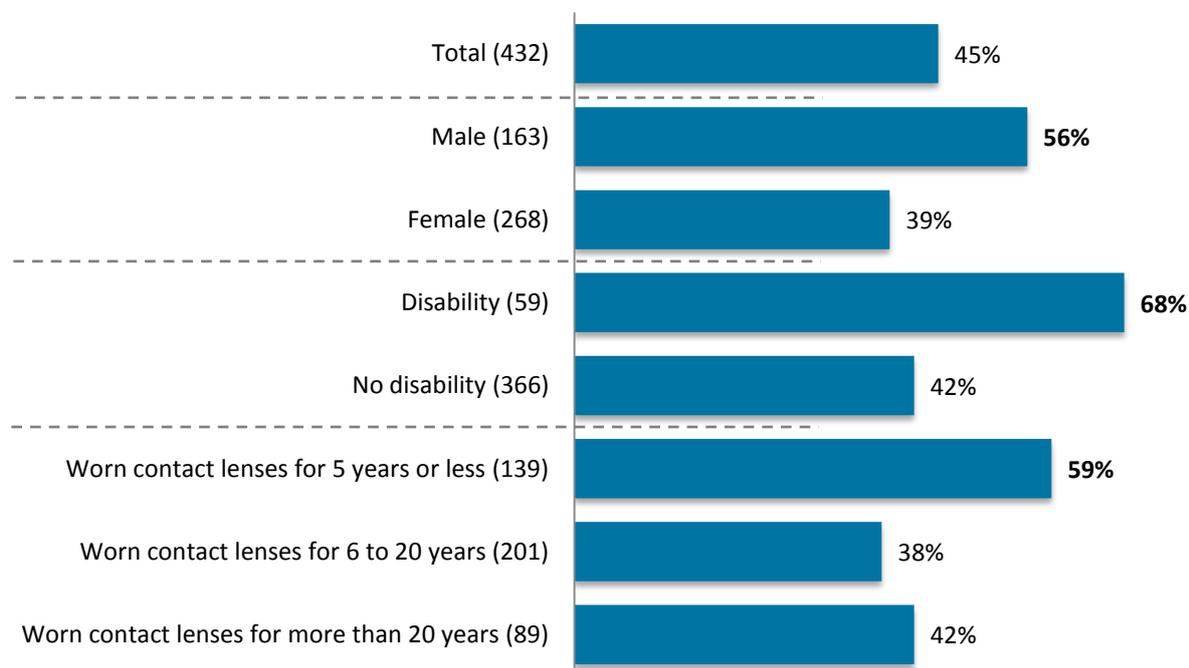
Of those who did not receive any aftercare advice, 33% said they would have found it useful to have had such advice.

6.4 Provision of aftercare advice for online buyers

Of those who primarily buy their contact lenses online, 45% say they receive information and instructions on how to wear and look after their contact lenses when they receive their order. Two fifths say they did not (39%) while the remainder did not know (16%).

Men are significantly more likely than women to say that they received aftercare advice with their online order (56% cf. 39%). This difference may be in part due to the slightly higher level of ‘don’t know’ responses from women (14% male, 17% female), a finding that is typical across much research, but this does not account for all the difference and might be a reflection of an underlying difference in the types of website men and women buy their contact lenses from. As well as men and women, those who indicated that they had a disability (68% cf. 42% among those with no disability) were also more likely to say that they received advice. Consumers who have worn contact lenses for 5 years or less are also significantly more likely to say they received aftercare advice with their online order (59%) compared to those who have been wearing them for 6 to 20 years (38%) or more than 20 years (42%).

Figure 44: Proportion that receive aftercare advice with their online order (those who primarily buy online)



C13. Do you receive information and instructions on how to wear and look after your contact lenses when you receive your order?

Sample bases in parentheses

Figures in bold are statistically significantly higher than average (minus the sub-group tested)

6.5 Awareness and compliance

Respondents were presented with a number of examples of contact lens aftercare advice 'dos' and 'don'ts' (provided by the BCLA) and were asked which they were aware of, which they currently follow, and which they were not aware of.

It is worth noting that a proportion of respondents (ranging from >0.5% to 21%) felt that some of the statements were not applicable to them. This was most often the case among those who wear disposable lenses who did not feel the advice relating to lens cases and solution was applicable to them. The results are based on all contact lens wearers in order to provide an overall picture of awareness and compliance.

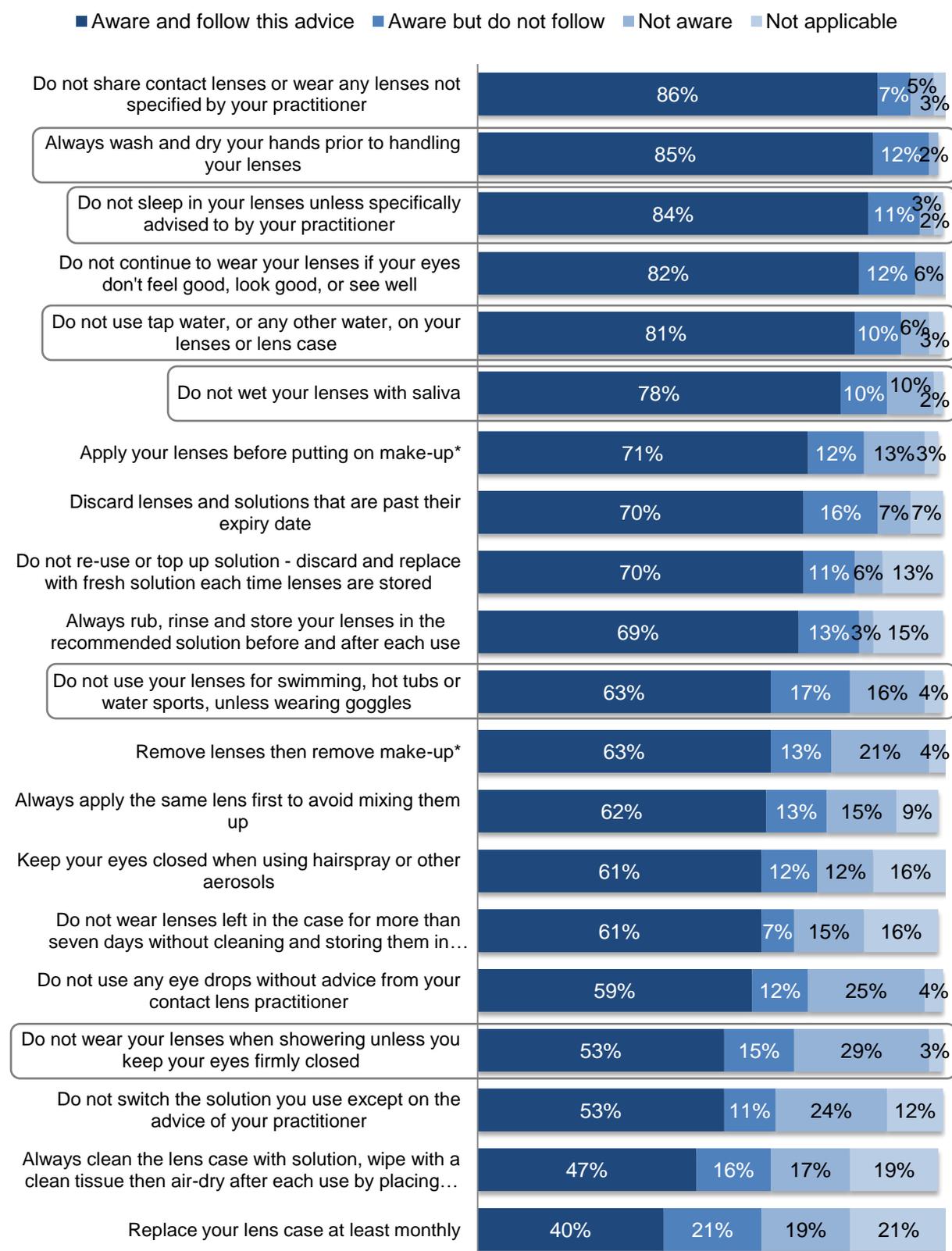
In most cases there is a fairly high level of awareness, and the majority of respondents comply with the advice they are aware of.

At least nine in ten respondents are aware that they should always wash and dry their hands prior to handling their lenses (97%), not sleep in their lenses (95%), not continue to wear them if their eyes don't feel good/look good/see well (94%), not share their lenses or wear any lenses not specified by their practitioner (93%) and not use tap water on their lenses (91%).

At the other end of the scale, the advice with the lowest levels of awareness includes the need to replace the lens case at least monthly (61%), the advised method of cleaning the lens case (63%), not switching the solution they use except on the advice of their practitioner (64%), not wearing their lenses when showering (68%) and not wearing lenses left in the case for more than seven days without cleaning and storing them in fresh solution (68%).

In terms of compliance with the advice, fewer than one in five respondents do not follow each of the pieces of advice despite being aware of it. The advice with the highest level of non-compliance is replacing the lens case at least monthly (21% aware but do not follow), followed by using lenses for swimming, hot tubs or water sports without goggles (17%), not following the advised method of cleaning the lens case (16%), not discarding lenses and solutions that are past their expiry date (16%) and wearing lenses when showering (15%).

Figure 45: Awareness and compliance with aftercare advice (all respondents)

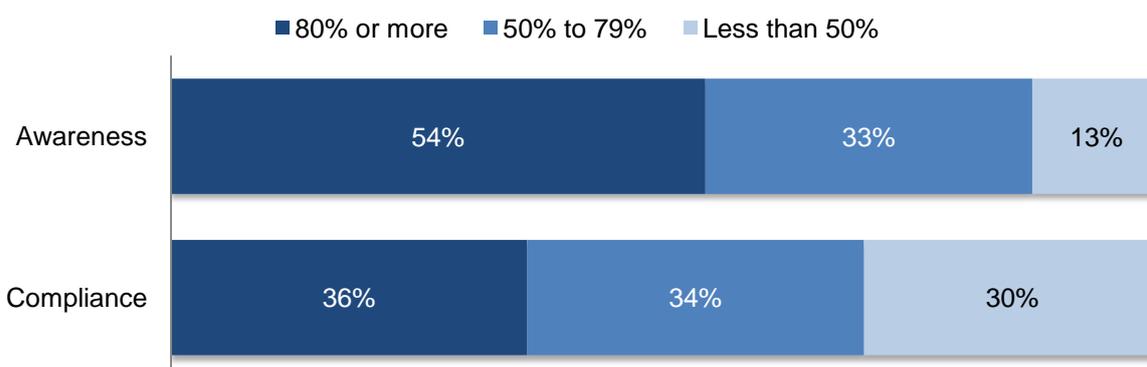


B10. The BCLA has some useful tips on contact lens wear and care to help consumers get the best out of their contact lenses. Please look at the below contact lens aftercare advice and for each statement, select whether you were aware of this advice, and whether you currently follow the advice. Sample base = 1005 (minimum)

*Based on those who ever wear make-up = 744

In summary, more than half of contact lens wearers are aware of 80% or more of the advice statements (54%), a third are aware of 50-79% (33%) and 13% are aware of less than 50% of the advice. In terms of compliance, around a third comply with 80% or more of the advice (36%), another third comply with 50 to 79% (34%) and the final third comply with less than 50% of the advice (30%).

Figure 46: Summary of awareness and compliance with aftercare advice (all respondents)

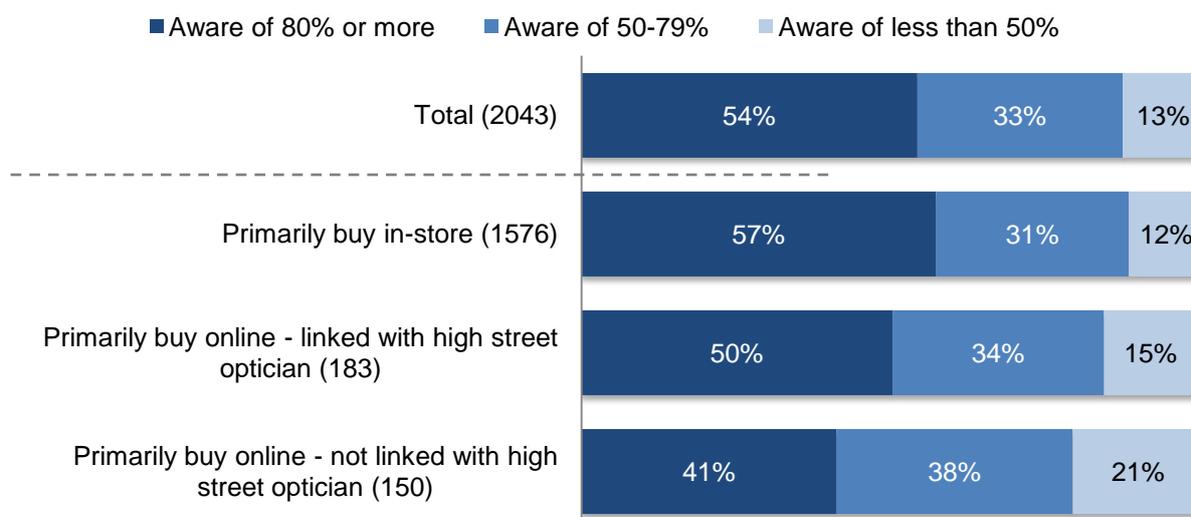


B10. The BCLA has some useful tips on contact lens wear and care to help consumers get the best out of their contact lenses. Please look at the below contact lens aftercare advice and for each statement, select whether you were aware of this advice, and whether you currently follow the advice. Sample base = 2043

Awareness of aftercare advice varies by subgroup and by region (see Figures 57 and 58 in Appendix 4). The following groups have significantly lower awareness of the BCLA aftercare advice (aware of less than 50% of advice):

- Males (16% cf. 12% among females);
- Those aged 55+ (18% cf. 14% among those aged 35-54, 11% among those aged under 35+);
- ABC1s (15% cf. 9% among C2DEs);
- Those living alone (21%);
- Those without a disability (14% cf. 8% among those with a disability);
- Those who wear contact lenses infrequently (29% cf. 9% among those who wear them every day, 16% who wear them 1-5 times a week/a few times a month);
- Those who primarily buy contact lenses from a purely online company (21% cf. 12% among those who buy in-store, 15% among those who buy from an online retailer which is linked with a high street optician);
- Those living in rural locations (18% cf. 13% among those living in urban locations); and
- Those classified as rural residents (19%).

Figure 47: Summary of awareness of aftercare advice by those who primarily buy in-store vs online (all respondents)



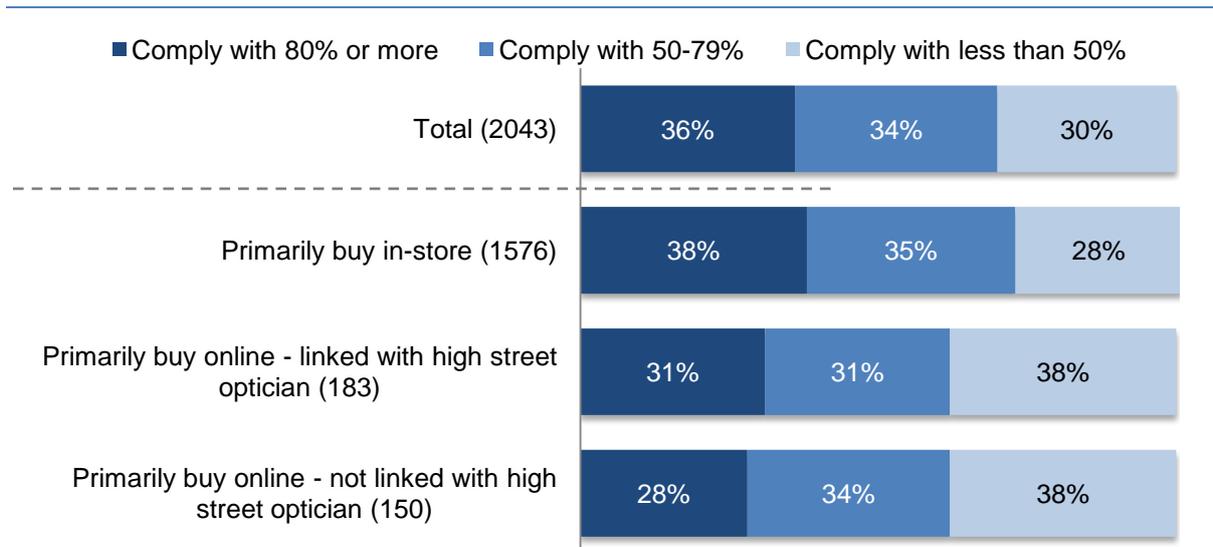
B10. The BCLA has some useful tips on contact lens wear and care to help consumers get the best out of their contact lenses. Please look at the below contact lens aftercare advice and for each statement, select whether you were aware of this advice, and whether you currently follow the advice. Sample bases in parentheses

Compliance with aftercare advice also varies by subgroup and by region (see Figures 59 and 60 in Appendix 4). The following groups comply with significantly less of the BCLA aftercare advice (comply with less than 50% of advice):

- Males (40% cf. 25% among females);
- Those aged under 35 (35% cf. 28% among those aged 35-54, 27% among those aged 55+);
- ABC1s (32% cf. 24% among C2DEs);
- Those living alone (36%);
- Those who have worn contact lenses for 5 years or less (33%);
- Those who wear contact lenses infrequently (37%) and 1-5 times a week/a few times a month (33%) compared to those who wear them every day (27%);
- Those who primarily buy contact lenses online, either which is linked to a high street optician or is a purely online company (both 38% cf. 28% among in-store buyers); and
- Those living in London (36%).

In addition, those who view contact lenses as a cosmetic product are significantly more likely to comply with less than 50% of advice (39%) compared to those who view them as a healthcare product (26%) or a lifestyle product (31%).

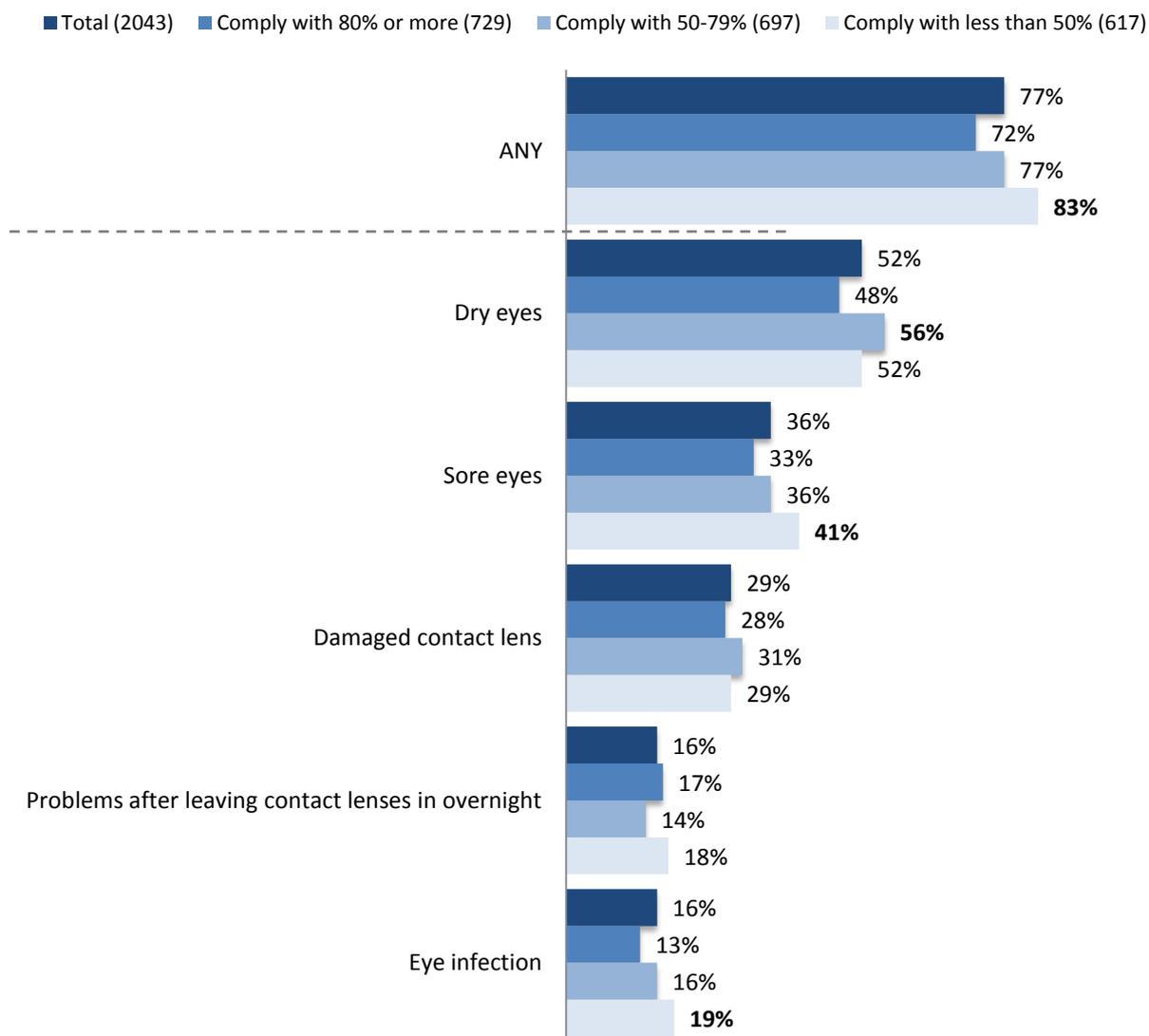
Figure 48: Summary of compliance with aftercare advice by those who primarily buy in-store vs online (all respondents)



B10. The BCLA has some useful tips on contact lens wear and care to help consumers get the best out of their contact lenses. Please look at the below contact lens aftercare advice and for each statement, select whether you were aware of this advice, and whether you currently follow the advice. Sample bases in parentheses

It is important to note that the proportion of respondents that have experienced any problems as a result of wearing contact lenses (such as dry eyes, sore eyes, an eye infection) increases as compliance with aftercare advice decreases, as illustrated in the figure below.

Figure 49: Whether ever experienced any problems with contact lenses, by compliance with advice (all respondents)



B9a. Have you ever experienced any of the following in relation to wearing your contact lenses?
 Sample bases in parentheses
Figures in bold are statistically significantly higher than average (minus the sub-group tested)

6.5.1 Segmentation

In order to classify respondents into a small number of segments, a clustering method has been used. Respondents within a group are said to be similar for some given characteristics, and dissimilar to respondents in other segments, for the same characteristics.

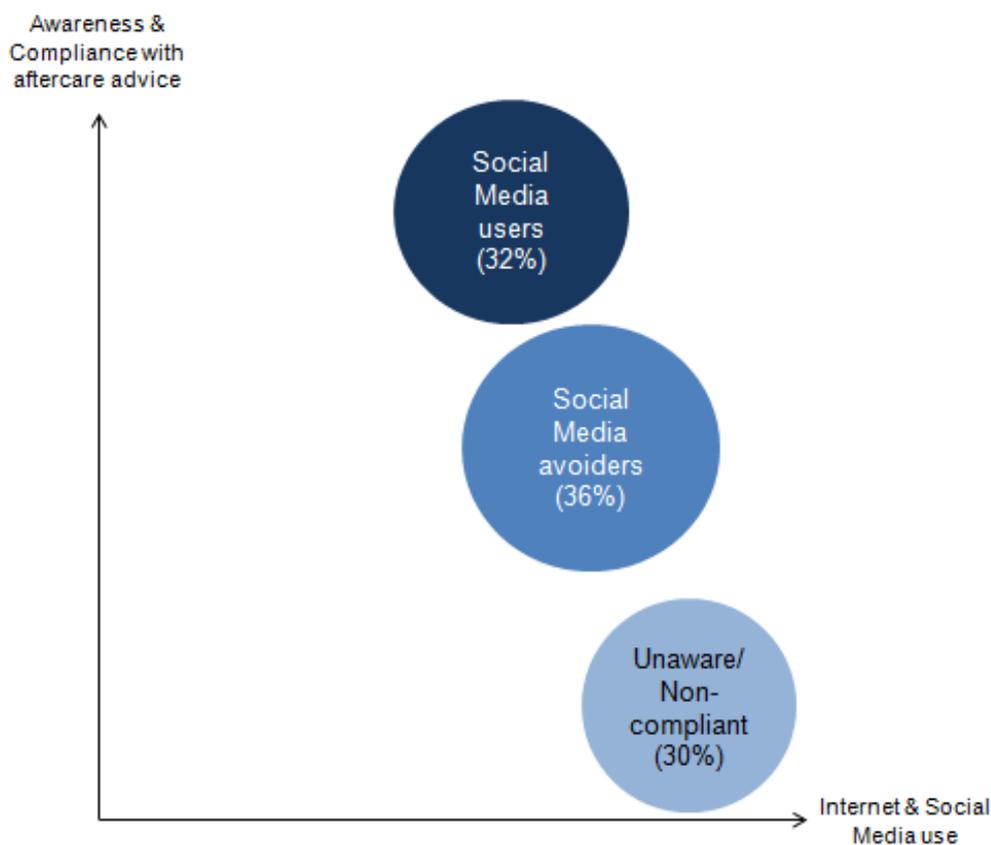
The segments have been created using the following questions:

- Awareness and compliance with BCLA aftercare advice (B10);
- How often do you access the internet for personal use? (F1);
- How often do you use any of the following social media sites? (F2); and
- How often, if at all, do you buy products online? (F3).

Respondents were classified into three distinct groups using a K-means algorithm which works by finding the distance for each respondent to each segment. Respondents were then assigned to the nearest segment and the centres of each segment were re-calculated. Respondents were then re-allocated to the nearest segment using the new segment centres. This process was repeated until there was no movement from one segment to another. The resulting segments contain respondents that are similar to each other within a segment, and dissimilar to respondents in other segments.

The following figure summarises where the three segments sit in terms of awareness/compliance with BCLA aftercare advice and internet use. More detailed findings on key demographic differences across the three segments can be found in Appendix 5.

Figure 50: Segmentation



Those classified as “social media users” account for 32% of the sample and have the highest awareness and are most compliant with the BCLA aftercare advice. Compared to average, they are significantly more likely to be male, aged under 35, in full-time employment, in SEG group A or C2, living with children and at least one other adult, and are more likely to have a disability. This group are also more likely to live in London, urban and more deprived areas. In terms of internet use, they are more likely to use the internet several times per week, use social media sites and buy products

online all the time. In relation to their contact lenses, compared to average, they are significantly more likely to:

- Wear daily contact lenses most often;
- Have worn contact lenses for less than 10 years;
- Wear contact lenses every day or 3-5 times per week;
- Wear contact lenses at work, for driving, exercising/playing sports, improving their appearance and improving their peripheral vision;
- View contact lenses as an important part of day-to-day life;
- Go for eye tests and contact lens check-ups more than once a year (and more likely to have had them done at the same time);
- Have a copy of their spectacles prescription and contact lens specification;
- Have been informed how often to have their contact lens specification checked;
- Say the aftercare advice was useful (or that they would have liked more advice, if they did not receive any);
- Have experienced any problems with their eyes;
- Buy in-store (and those who buy online are more likely to use a website that is linked with a high street optician);
- Buy contact lenses every few weeks;
- Make regular payments; and
- Shop around and have used any websites/apps to save money when buying contact lenses.

Those classified as “social media avoiders” account for 36% of the sample. Compared to average, they are more likely to be female, aged 45 or over, a housewife/homemaker or retired, in SEG group C1, D or E and to be living with no children but at least one other adult. Social media avoiders are more likely to live in the North West, South West or Yorkshire and The Humber, in less deprived areas. This group are more likely to use the internet daily, but less likely to use any social media sites and more likely to buy products online regularly, infrequently or rarely (rather than all the time). In relation to their contact lenses, compared to average, they are significantly more likely to:

- Wear monthly or rigid gas permeable contact lenses most often;
- Have worn contact lenses for 16 years or more;
- Wear contact lenses for every day wear;
- View contact lenses as a healthcare product;
- Buy in-store;
- Buy contact lenses once a year or less often; and
- Make regular payments.

At the other end of the scale, those classed as “unaware/non-compliant” account for 30% of the sample and have the lowest awareness and are least compliant with the BCLA aftercare advice. Compared to average, they are significantly more likely to be in SEG group C1, to live alone and not have a disability. This group are more likely to use the internet daily and use social media sites (with the exception of LinkedIn). In

relation to their contact lenses, compared to average, they are significantly more likely to:

- Wear contact lenses 1-2 times per week, a few times per month or infrequently;
- View contact lenses as a lifestyle product;
- Have experienced any problems with their eyes;
- Buy online; and
- Make one-off payments.

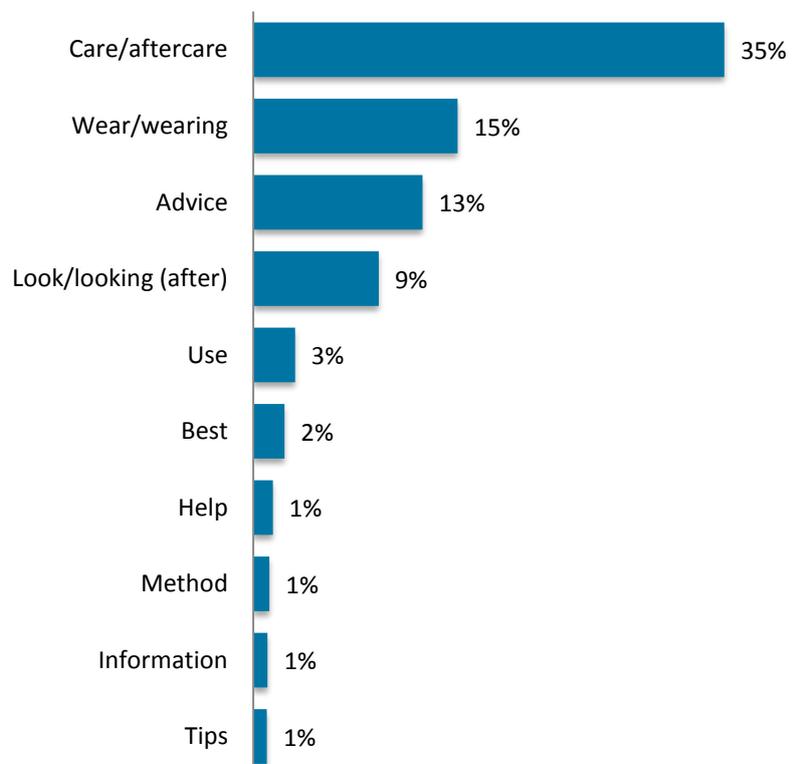
6.6 Searching for advice online

At the end of the survey, respondents were asked what words they would type in to an internet search engine if they wanted to find advice on how to wear and look after their contact lenses.

Beyond the words *contacts/contact lens/lenses*, the most common search term is *care/aftercare*, used by a third of respondents (35%). This is followed by *wear/wearing* (15%), *advice* (13%) and *look/looking (after)* (9%). Fewer respondents would search for advice using the words *help*, *method*, *information* or *tips* (1% each). These results are summarised in the following figure.

The full set of verbatim responses from this question is available separately.

Figure 51: How contact lens wearers would search for advice online (words mentioned by 1% or more, excludes mentions of “contacts/contact lenses/lenses”) (all respondents)



E2. If you wanted to find advice online on how to wear and look after your contact lenses, can you tell us what words you would type in to an internet search engine (such as Google)?

Sample base = 2043

7 Code of practice

The following section examines consumers' views towards a code of practice, specifically in terms of whether such a code would change their purchasing behaviour.

7.1 Impact of GOC accreditation

In order to measure the impact of accreditation, a randomised control trial (RCT) was conducted whereby respondents were randomly allocated to either the control group or the treatment group.

Respondents were asked to read a passage which differed depending on which group they had been allocated to.

The **control** group were shown the following (non-accredited version):

Our contact lenses are 10% cheaper than other retailers and can be delivered to your door each month free of charge. We also offer a money back guarantee if you are not satisfied with our products and/or services.

The **treatment** group were shown the following (accredited version):

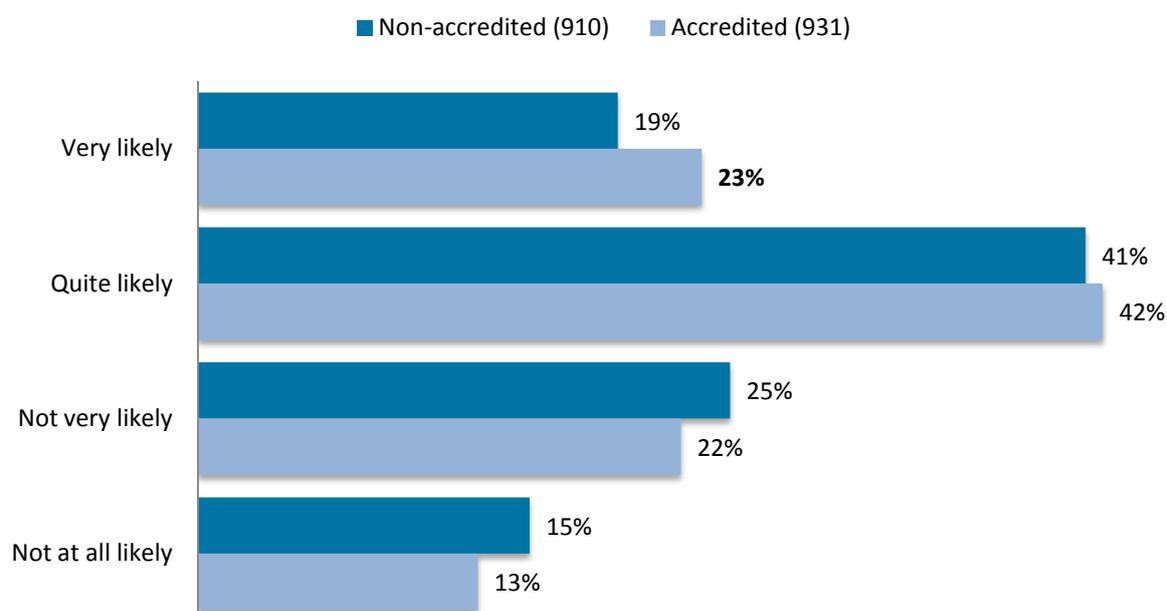
Our contact lenses are 10% cheaper than other retailers and can be delivered to your door each month free of charge. We also offer a money back guarantee if you are not satisfied with our products and/or services.

We are accredited by professional bodies within the optical sector, supported by the General Optical Council, the regulator for the optical professions (optometrists and dispensing opticians) in the UK.

All respondents were then asked to rate how likely they would be to buy contact lenses from the fictional online retailer.

As shown in the figure below, 65% of respondents who were shown the passage which mentioned the accreditation would be 'very or quite likely' to buy from the retailer, compared to 60% of those who were shown the passage which did not mention the accreditation, representing a small but statistically significant difference.

Figure 52: Whether a GOC accreditation would increase propensity to purchase (RCT) (all respondents who provided a valid response)



E1a. How likely you would be to buy contact lenses from this online retailer?

Sample bases in parentheses

Figures in bold are statistically significantly higher than those who saw the non-accredited version

In the question that followed, respondents were then told about the code of practice that is being developed:

The General Optical Council is developing a voluntary code of practice that will include a list of points that an online supplier has to commit to when selling contact lens online. The intention behind the code is to improve the practice of the online suppliers by encouraging them to provide information and advice and ensure that, as far as possible, customers are having regular eye examinations/sight tests and contact lens check-ups.

As part of the code, the General Optical Council is also planning to use a logo which will be monitored by an independent body to ensure compliance with the code and suppliers will be expected to display the logo. The logo will be available to any online contact lens supplier that is able to demonstrate their commitment and compliance to the code of practice.

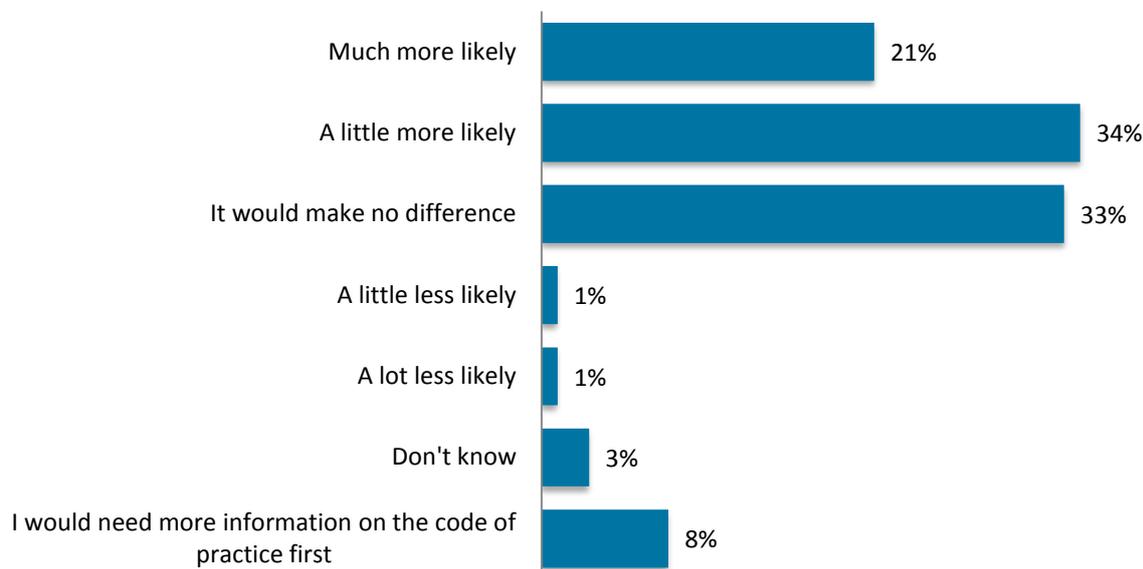
Following this, respondents were asked whether the use of a logo on a website would make them more or less likely to buy contact lenses from that particular retailer. The results are shown in the figure below.

Over half of respondents say that a logo would make them either much more (21%) or a little more likely (34%) to buy contact lenses from a particular retailer, while a third say it would make no difference (33%) and just 2% say it would make them less likely to do so. Eight per cent of respondents would need more information on the code of practice first.

The results also suggest that online purchasers may be more susceptible to accreditation, with 73% of online-only purchasers indicating that they would be much

or a little more likely to purchase from a retailer that was accredited/featured a logo (25% much more likely / 48% a little more likely), compared to just 59% of those who only bought in-store (24% much more likely / 35% a little more likely).

Figure 53: Whether a GOC accreditation/logo would increase propensity to purchase from a particular retailer (prompted) (all respondents)



E1. Would the use of a logo on a website make you more or less likely to buy contact lenses from that particular retailer?

Sample base = 2043

Results from both the prompted question (Figure 52) and the RCT (Figure 51) show that contact lens wearers are more likely to purchase from an accredited retailer, however the extent of this differs significantly due to the two different testing methods. It is likely that the size of the impact will be closer to the results seen in the RCT since this is a closer reflection of reality compared to the prompted question.

8 Zero-powered contact lenses

This final section of the report examines the proportion of consumers that have ever bought zero-powered contact lenses (i.e. coloured/tinted contact lenses which are not for vision correction purposes). This section combines results from the main survey and those from the Omnibus survey in order to understand this as a proportion of the general public. It also details where zero-powered contact lenses have been bought from and whether consumers received any advice on how to wear the contact lenses safely.

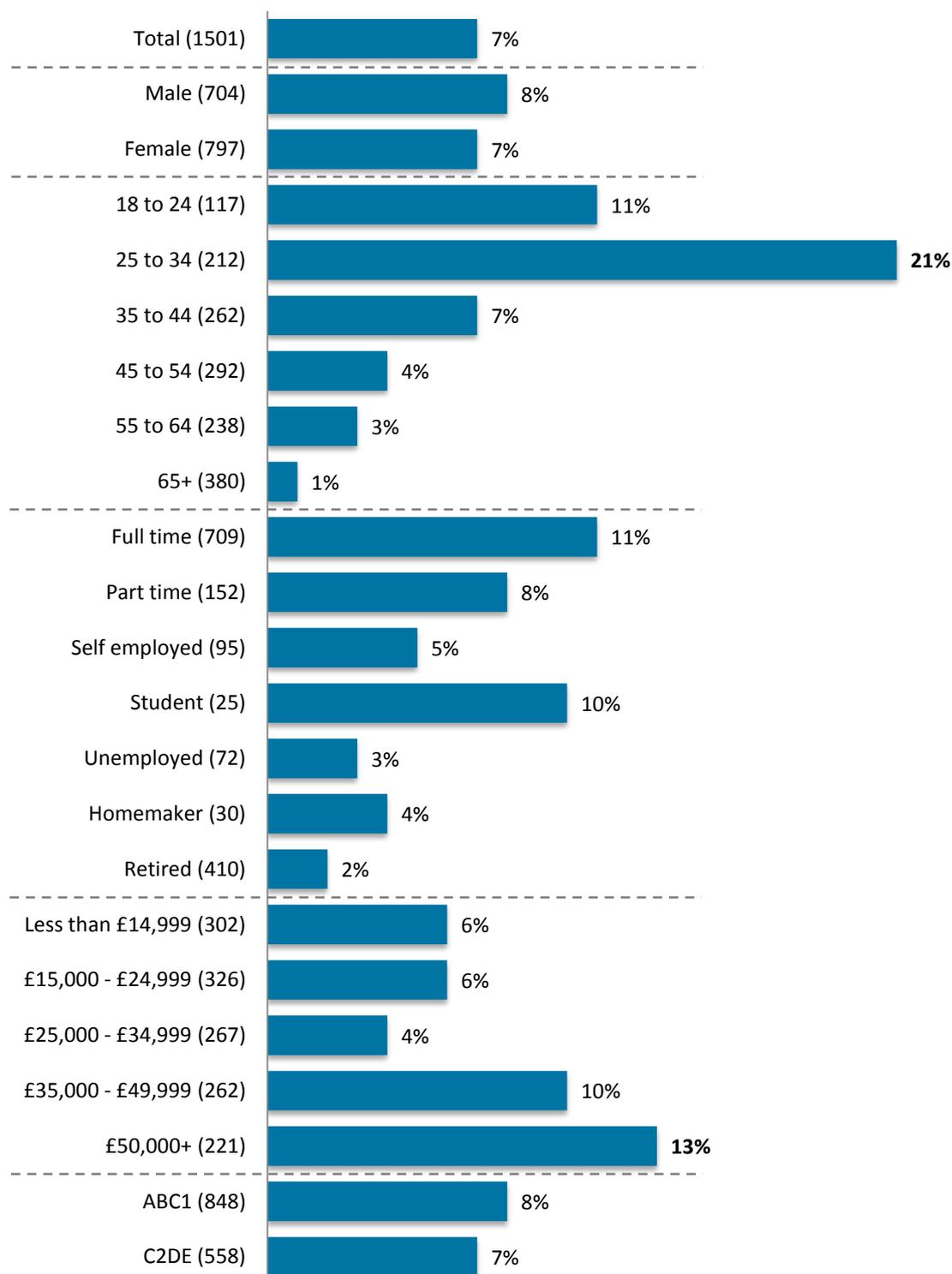
8.1 Proportion that have ever worn zero-powered contact lenses

As seen earlier in the report (Figure 6), 5% of contact lens wearers in the main survey have ever worn zero-powered contact lenses, with just 1% wearing this type of contact lens most often.

Results from the Omnibus survey reveal that 7% of the general public have ever worn zero-powered contact lenses. This proportion is significantly higher among those aged 25 to 34 years old (21%), those with a household income of £50,000 or more (13%), those living in London (19%) and in areas defined as cosmopolitan or ethnicity central (both 21%).

The proportion of the general public who have worn zero-powered contact lenses (7% in the Omnibus survey) is likely to be higher than the proportion among contact lens wearers (5% in the main survey) because the main survey is based on those who *currently* wear contact lenses, rather than those who have *ever* worn them. Therefore, those who have *ever* worn zero-powered contact lenses (and do not *currently* wear any contact lenses) would not have qualified for the main survey, and therefore would not have been included within the proportion.

Figure 54: Proportion that have ever worn zero-powered contact lenses, by gender, age, working status, household income, socio-economic grade (all respondents – Omnibus survey)

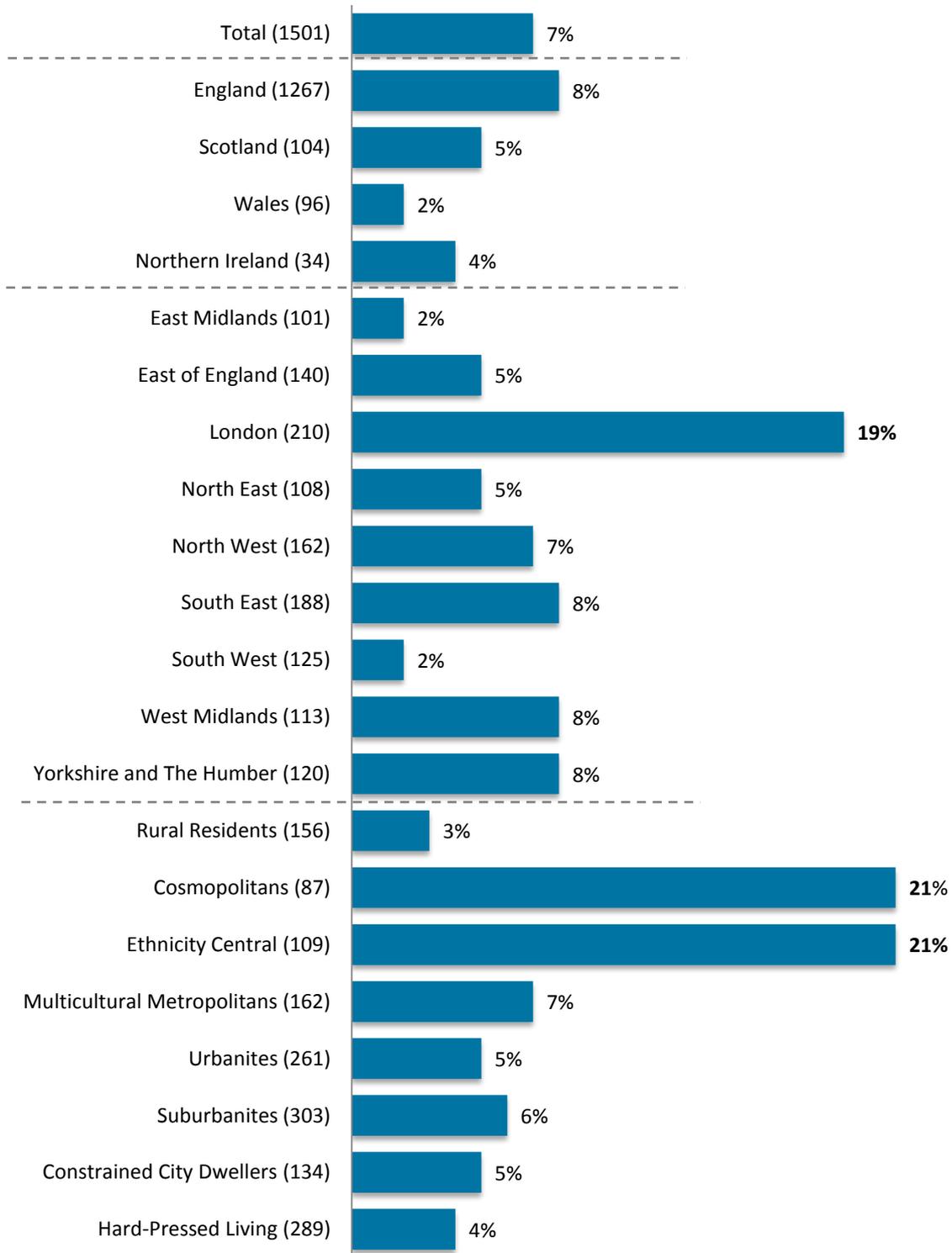


Have you ever worn coloured/tinted contact lenses which were not for vision correction purposes?

Unweighted sample bases in parentheses

Figures in bold are statistically significantly higher than average (minus the sub-group tested)

Figure 55: Proportion that have ever worn zero-powered contact lenses, by region (all respondents – Omnibus survey)

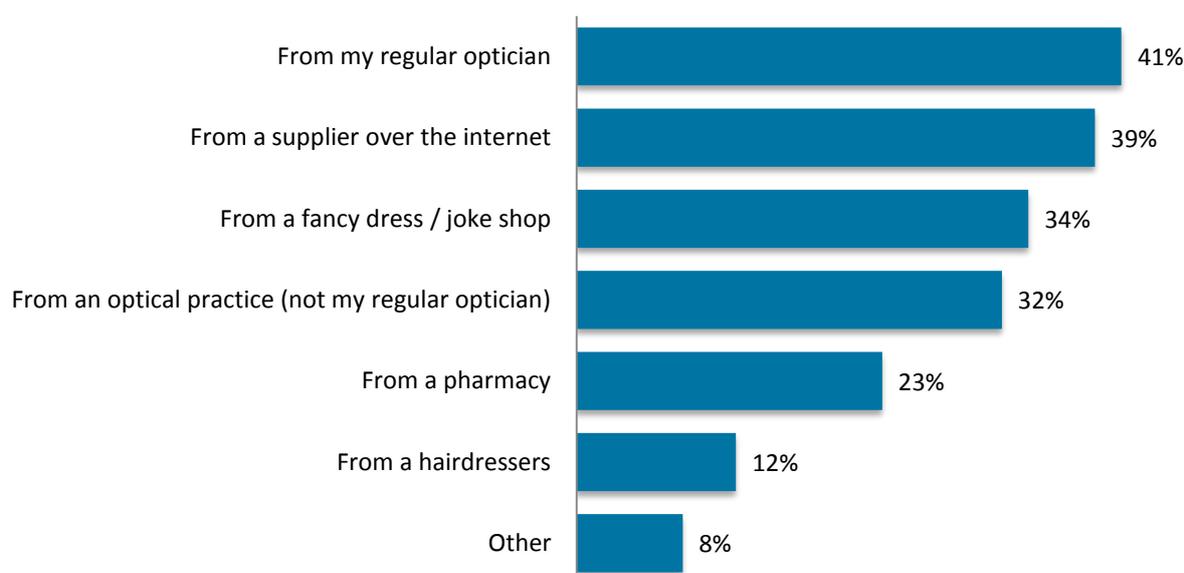


Have you ever worn coloured/tinted contact lenses which were not for vision correction purposes?
 Unweighted sample bases in parentheses
 Figures in bold are statistically significantly higher than average (minus the sub-group tested)

8.2 Where zero-powered contact lenses have been bought from

Respondents from the Omnibus survey who indicated that they had ever worn zero-powered contact lenses were asked where they bought them from. Two fifths bought them from their regular optician (41%) or from an internet supplier (39%). A third of respondents (34%) bought the contact lenses from a fancy dress/joke shop, from an optical practice that was not their regular optician (32%), while a quarter bought them from a pharmacy (23%) and 12% from a hairdressers.

Figure 56: Where bought zero-powered contact lenses from (those who have ever bought zero-powered contact lenses – Omnibus survey)



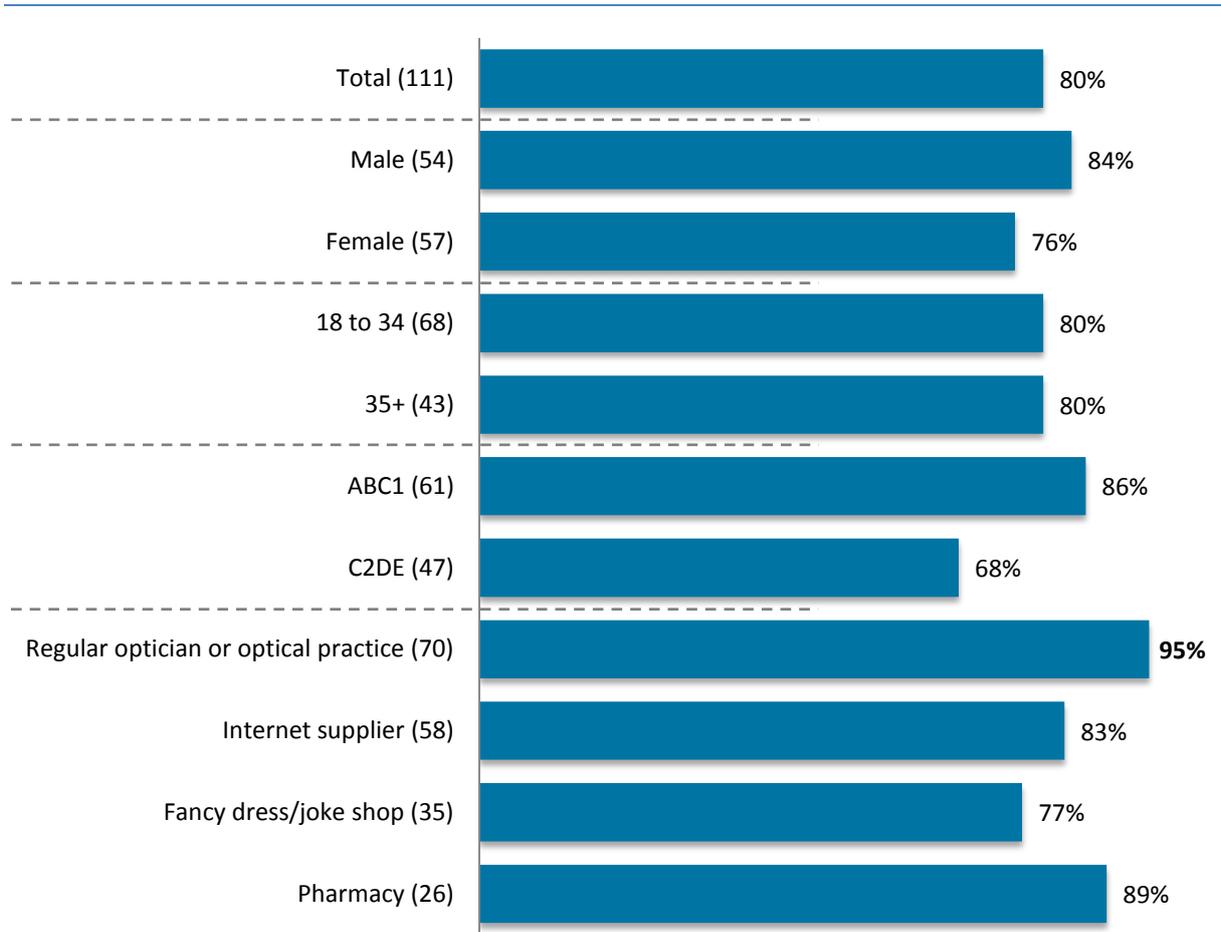
Where did you buy the coloured/tinted contact lenses?
Unweighted sample base = 111

8.3 Advice on how to safely wear zero-powered contact lenses

Four fifths (80%) of those who have bought zero-powered contact lenses received advice on how to wear them safely, while 17% did not and the remaining 3% could not recall.

There are no significant differences by gender, age or socio-economic grade, however those who bought the contact lenses from their regular optician or an optical practice are significantly more likely to have received advice on how to wear them safely (95%), particularly when compared to those who bought in a fancy dress/joke shop (77%).

Figure 57: Proportion that received any advice on how to wear zero-powered contact lenses, by gender, age, socio-economic grade and where bought from (those who have ever bought zero-powered contact lenses – Omnibus survey)



When you purchased them, did you receive any advice on how to wear the coloured/tinted contact lenses safely?
 Unweighted sample bases in parentheses

Figures in bold are statistically significantly higher than average (minus the sub-group tested)

Appendix 1: About this report

Rounding

The data used in this report are rounded up or down to the nearest whole percentage point. It is for this reason that, on occasion, tables or charts may add up to 99% or 101%. Where tables and graphics do not match exactly to the text in the report this occurs due to the way in which figures are rounded up (or down) when responses are combined.

Data tables

Charts and tables of key findings are provided throughout this report. If more detailed information is required, users may wish to consult the data tables, available separately, which show the data broken down by the following variables:

- Gender
- Age
- Working status
- Hours worked per week
- Socio-economic grade
- Household composition
- Disability
- Type of contact lenses worn most often
- Length of time worn contact lenses for
- Frequency of wearing contact lenses
- Whether have contact lens specification
- Whether provided with aftercare advice
- Whether experienced any problems with contact lenses
- Awareness of aftercare advice
- Adherence to aftercare advice
- When last bought contact lenses
- Where ever bought contact lenses from
- Where most frequently buy contact lenses from
- Extent to which shop around for contact lenses
- Internet use
- How often buy products online
- Whether wear eye make up
- Whether go swimming
- Whether exercise/play sports
- Type of product contact lenses are seen as
- Urban/rural
- Country
- GOR (Government Office Region)
- IMD (Index of Multiple Deprivation) Quartile
- OAC (Output Area Classification)

Appendix 2: Output Area Classification groups

Rural residents

The population of this supergroup live in rural areas that are far less densely populated compared with elsewhere in the country. They will tend to live in large detached properties which they own and work in the agriculture, forestry and fishing industries. The level of unemployment in these areas is below the national average. Each household is likely to have multiple motor vehicles, and these will be the preferred method of transport to their places of work. The population tends to be older, married and well educated. An above average proportion of the population in these areas provide unpaid care and an above average number of people live in communal establishments (most likely to be retirement homes). There is less ethnic integration in these areas and households tend to speak English or Welsh as their main language.

Cosmopolitans

The majority of the population in this supergroup live in densely populated urban areas. They are more likely to live in flats and communal establishments, and private renting is more prevalent than nationally. The group has a high ethnic integration, with an above average number of residents from EU accession countries coinciding with a below average proportion of persons stating their country of birth as the UK or Ireland. A result of this is that households are less likely to speak English or Welsh as their main language. The population of the group is characterised by young adults, with a higher proportion of single adults and households without children than nationally. There are also higher proportions of full-time students. Workers are more likely to be employed in the accommodation, information and communication, and financial related industries, and using public transport, or walking or cycling to get to work.

Ethnicity central

The population of this group is predominately located in the denser central areas of London, with other inner urban areas across the UK having smaller concentrations. All non-white ethnic groups have a higher representation than the UK average especially people of mixed ethnicity or who are Black, with an above average number of residents born in other EU countries. Residents are more likely to be young adults with slightly higher rates of divorce or separation than the national average, with a lower proportion of households having no children or non-dependent children. Residents are more likely to live in flats and more likely to rent. A higher proportion of people use public transport to get to work, with lower car ownership, and higher unemployment. Those in employment are more likely to work in the accommodation, information and communication, financial, and administrative related industries.

Multicultural metropolitans

The population of this supergroup is concentrated in larger urban conurbations in the transitional areas between urban centres and suburbia. They are likely to live in terraced housing that is rented – both private and social. The group has a high ethnic

mix, but a below average number of UK and Irish born residents. A result of this is that households are less likely to speak English or Welsh as their main language. Residents are likely to be below retirement age. There is likely to be an above average number of families with children who attend school or college, or who are currently too young to do so. The rates of marriage and divorce are broadly comparable with the national average. The level of qualifications is just under the national average with the rates of unemployment being above the national average. Residents who are employed are more likely to work in the transport and administrative related industries. Public transport is the most likely method for individuals to get to and from work, since households are less likely to have multiple motor vehicles available to them.

Urbanites

The population of this group are most likely to be located in urban areas in southern England and in less dense concentrations in large urban areas elsewhere in the UK. They are more likely to live in either flats or terraces, and to privately rent their home. The supergroup has an average ethnic mix, with an above average number of residents from other EU countries. A result of this is households are less likely to speak English or Welsh as their main language. Those in employment are more likely to be working in the information and communication, financial, public administration and education related sectors. Compared with the UK, unemployment is lower.

Suburbanites

The population of this supergroup is most likely to be located on the outskirts of urban areas. They are more likely to own their own home and to live in semi-detached or detached properties. The population tends to be a mixture of those above retirement age and middle-aged parents with school age children. The number of residents who are married or in civil-partnerships is above the national average. Individuals are likely to have higher-level qualifications than the national average, with the levels of unemployment in these areas being below the national average. All non-White ethnic groups have a lower representation when compared with the UK and the proportion of people born in the UK or Ireland is slightly higher. People are more likely to work in the information and communication, financial, public administration, and education sectors, and use private transport to get to work.

Constrained city dwellers

This supergroup has a lower proportion of people aged 5 to 14 and a higher level aged 65 and over than nationally. It is more densely populated than the UK average. People are more likely to be single or divorced. There is a lower representation of all the non-White ethnic groups and of people who were born in other EU countries. There is a lower proportion of households with no children. Households are more likely to live in flats and to live in social rented accommodation, and there is a higher prevalence of overcrowding. There is a higher proportion of people whose day-to-day activities are limited, and lower qualification levels than nationally. There is a higher level of unemployment in the supergroup. There are no particular industries in which workers are most likely to be employed, but some industries such as information and communication, and the education sector are underrepresented.

Hard-pressed living

The population of this group is most likely to be found in urban surroundings, predominately in northern England and southern Wales. There is less non-White ethnic group representation than elsewhere in the UK, and a higher than average proportion of residents born in the UK and Ireland. Rates of divorce and separation are above the national average. Households are more likely to have non-dependent children and are more likely to live in semi-detached or terraced properties, and to socially rent. There is a smaller proportion of people with higher level qualifications, with rates of unemployment above the national average. Those in employment are more likely to be employed in the mining, manufacturing, energy, wholesale and retail, and transport related industries.

Appendix 3: Spectacles prescription and contact lens specification

Within the survey, a **spectacles/glasses prescription** was described as containing “the precise measurements of the type of prescription lenses that you need” and respondents were able to click to view the following example:

PRESCRIPTION EXAMPLE

When you have your eyes tested your optician is required by law to supply you with a written copy of your prescription. Generally written prescriptions follow a specific format which may look similar to the following example:

MY PRESCRIPTION

	SPH	CYL	AXIS	PRISM	INTER ADD	NEAR ADD	BVD
R	-4.50	-0.20	100			+1.75	
L	-3.00	-1.55	125			+1.75	

You can see that the prescription has a right (R) and left eye (L) which is then broken down into Sph, Cyl and Axis sections with values written in the relevant boxes. There is also a 'Near Add' part which is sometimes referred to as the 'Add' or 'Addition'. The value should always be the same for both your right eye and left eye and you need to enter this value if you would like reading spectacles.

When you have chosen a pair of glasses simply select the correct values for each of the boxes paying particular attention to the + (plus) and - (minus) fields. This is very important. If you enter -3.00 and your prescription is +3.00 your lenses will be incorrect. At Glasses Station we check each prescription carefully for any obvious mistakes and may occasionally contact you to verify the details; however, we cannot take any responsibility for information that has been entered incorrectly.

When ordering your glasses from us your prescription must be less than two years old. Regular eye examinations are recommended not only to ensure your spectacles are accurate and providing the best possible vision but also as an important part of your regular health care.

A **contact lens specification** was described as containing “full details of the contact lenses you need, including the lens type/manufacturer, base curve and diameter” and respondents were able to click to view the following example:

CLRx	Lens Name	B.C.	Dia	Sph	Cyl	Axis
R						
L						

Please remove contacts lens if your eyes are red, irritated, painful or light sensitive. The doctor recommends removal of contact lens at night or while swimming.

Solution:

Clear Care Other _____

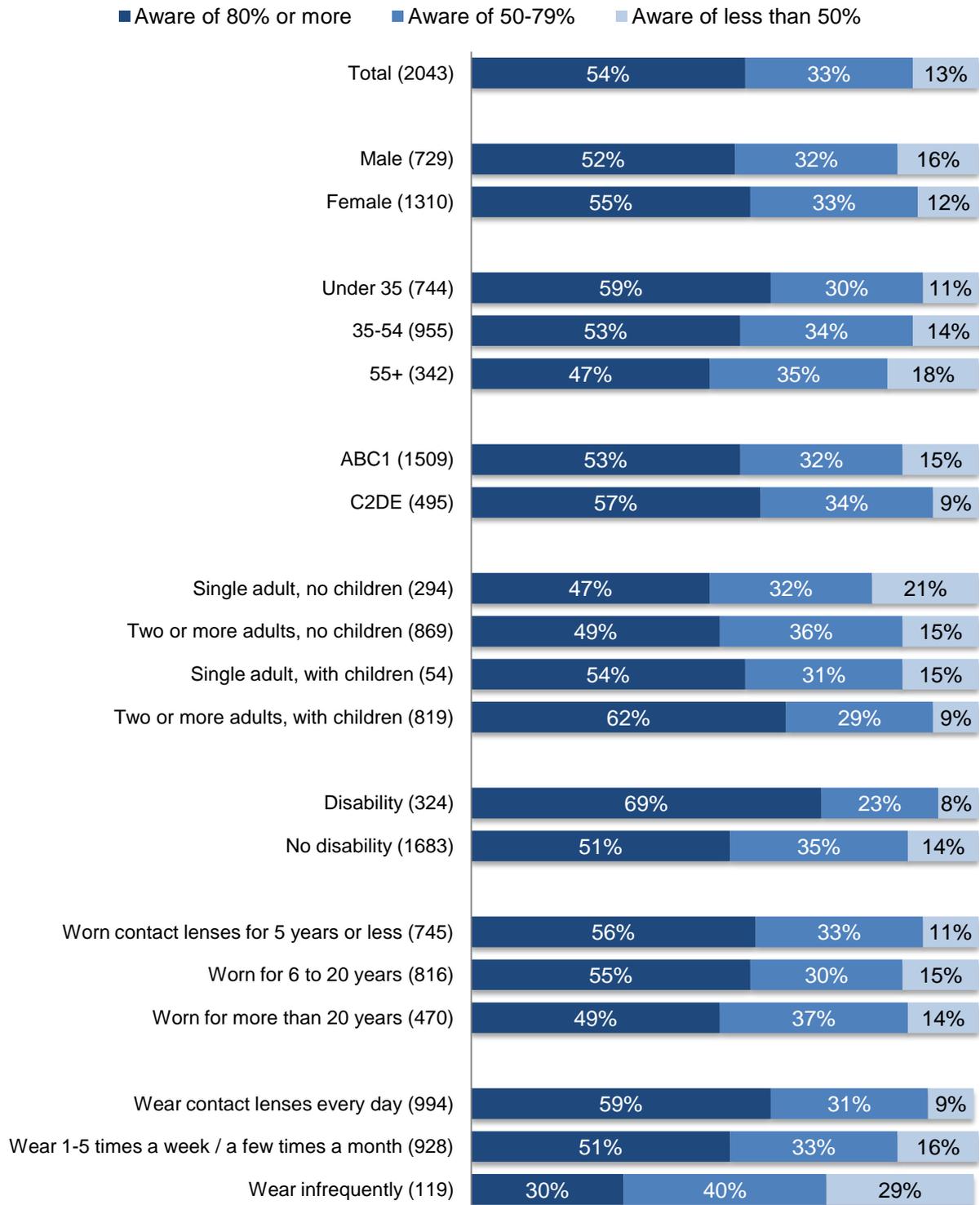
Replacement Schedule:

1 day 2-4 wks 2-3 mos 1 yr

Dr. _____ Prescription Expires in **ONE YEAR**

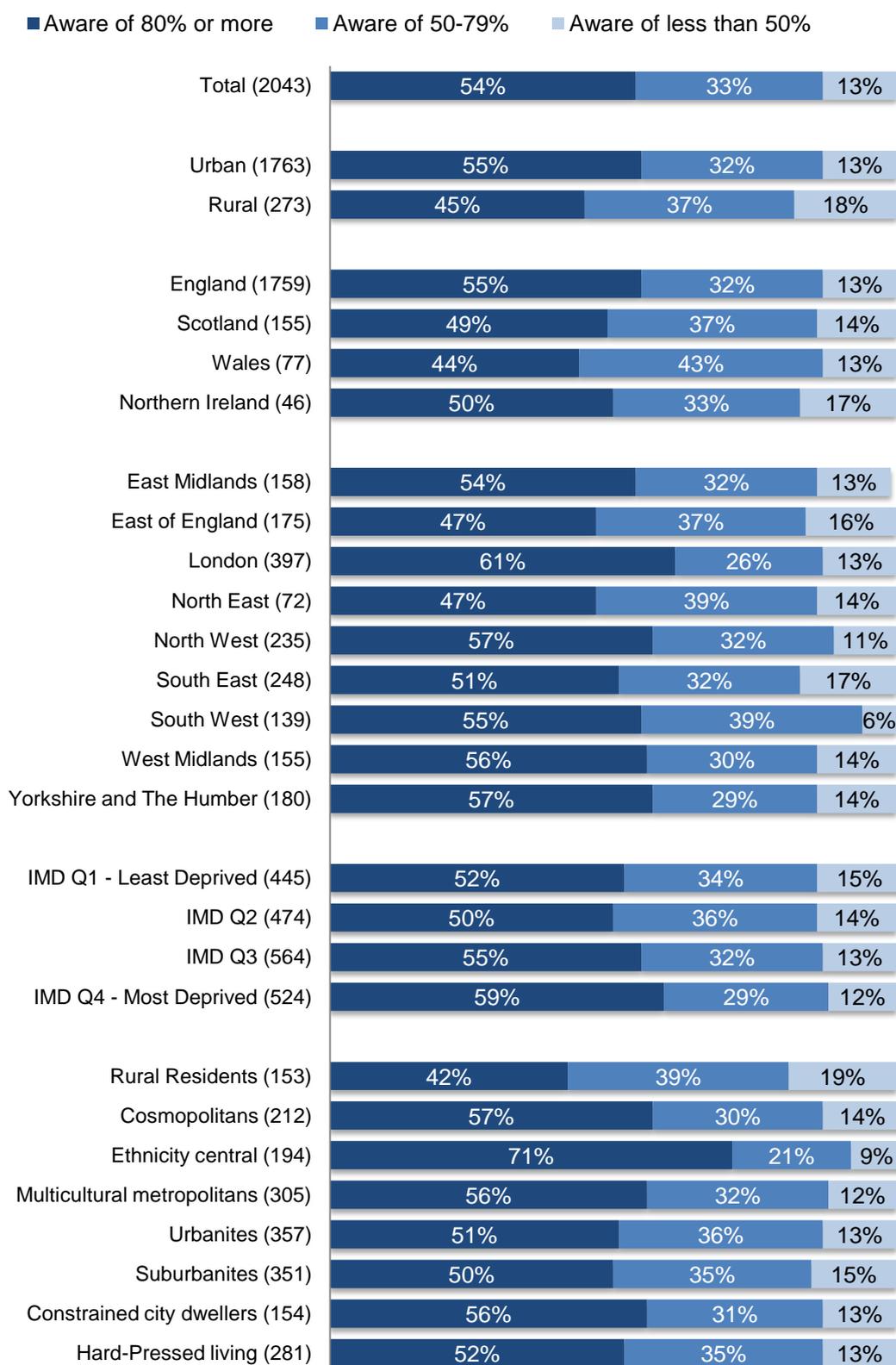
Appendix 4: Awareness of and compliance with aftercare advice

Figure 58: Summary of awareness of aftercare advice, by subgroup (all respondents)



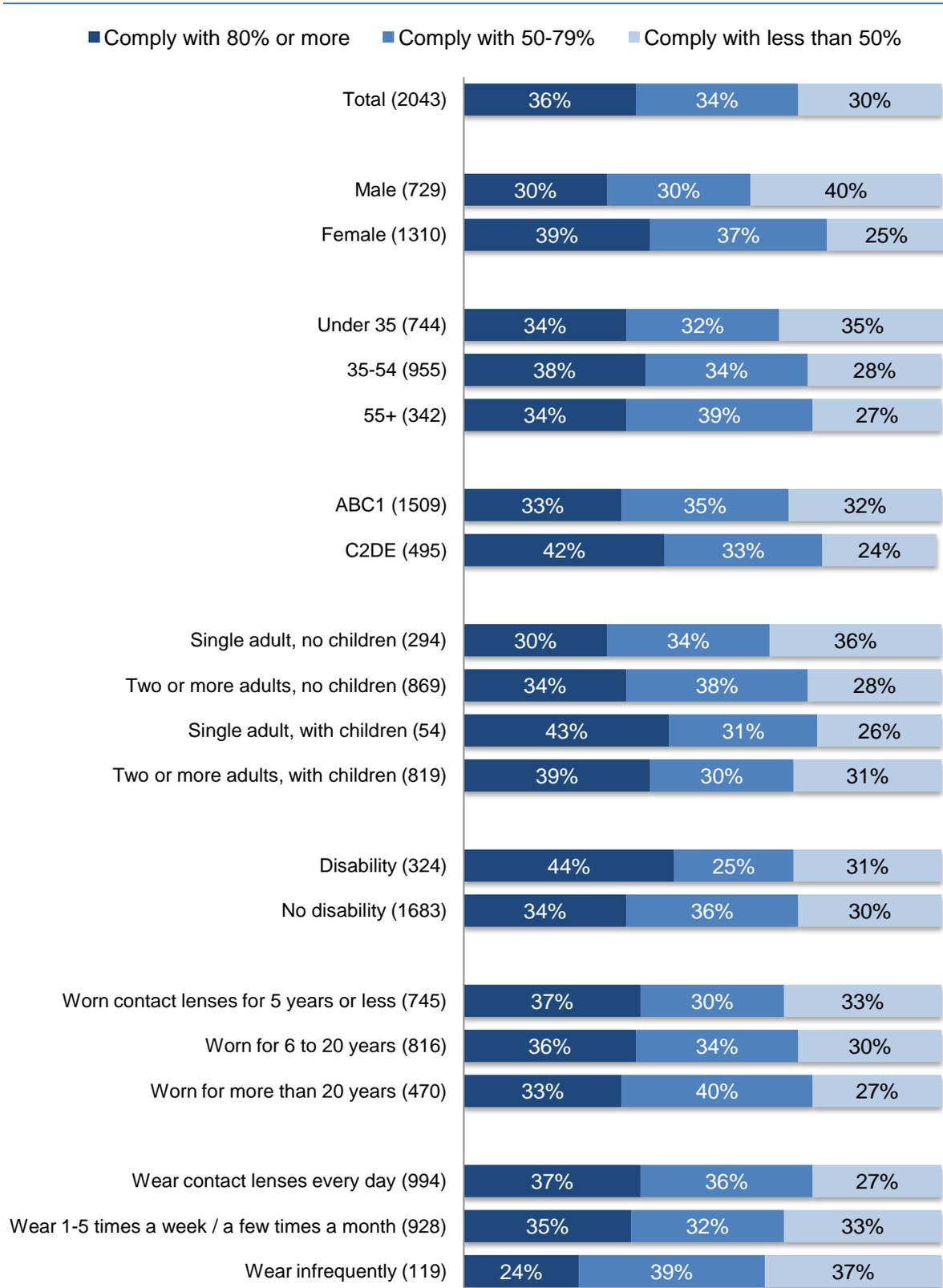
B10. The BCLA has some useful tips on contact lens wear and care to help consumers get the best out of their contact lenses. Please look at the below contact lens aftercare advice and for each statement, select whether you were aware of this advice, and whether you currently follow the advice. Sample bases in parentheses

Figure 59: Summary of awareness of aftercare advice, by region (all respondents)



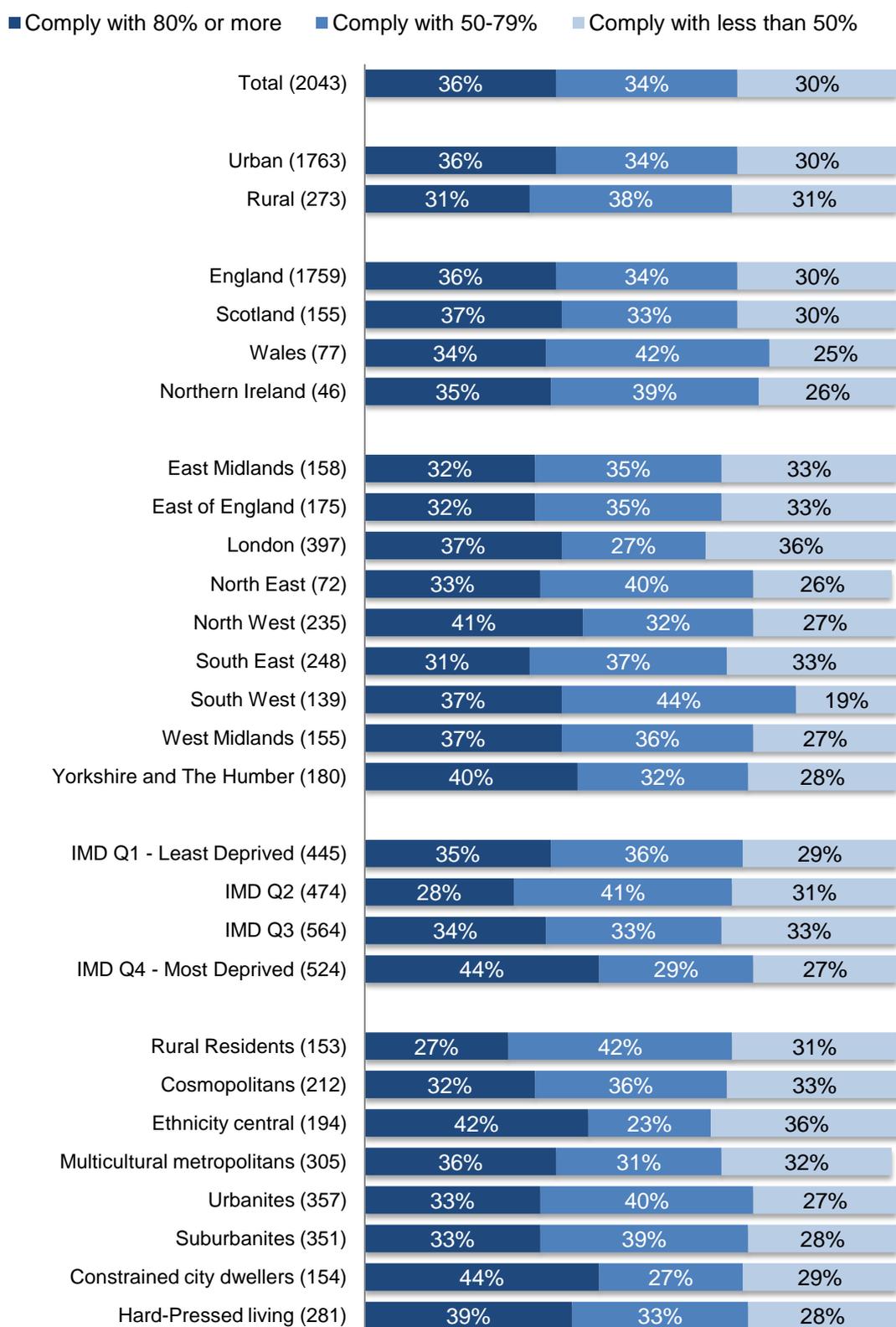
B10. The BCLA has some useful tips on contact lens wear and care to help consumers get the best out of their contact lenses. Please look at the below contact lens aftercare advice and for each statement, select whether you were aware of this advice, and whether you currently follow the advice. Sample bases in parentheses

Figure 60: Summary of compliance with aftercare advice, by subgroup (all respondents)



B10. The BCLA has some useful tips on contact lens wear and care to help consumers get the best out of their contact lenses. Please look at the below contact lens aftercare advice and for each statement, select whether you were aware of this advice, and whether you currently follow the advice. Sample bases in parentheses

Figure 61: Summary of compliance with aftercare advice, by region (all respondents)



B10. The BCLA has some useful tips on contact lens wear and care to help consumers get the best out of their contact lenses. Please look at the below contact lens aftercare advice and for each statement, select whether you were aware of this advice, and whether you currently follow the advice. Sample bases in parentheses

Appendix 5: Segmentation

Table 1: Key differences by segment (compared to average)

	Social Media Users n=662	Social Media Avoiders n=740	Unaware/Non-compliant n=606
Proportion of sample	32%	36%	30%
Aware of 80% or more of aftercare advice	84%	68%	5%
Comply with 80% or more of aftercare advice	53%	49%	0%
Gender	More likely to be male (46%)	More likely to be female (75%)	No significant difference vs average
Age	More likely to be under 35 (53%)	More likely to be 45 or over (54%)	No significant difference vs average
Employment status	More likely to be in full-time employment (75%)	More likely to be a housewife/homemaker (13%) or retired (13%)	No significant difference vs average
Socio-economic grade	More likely to be A (20%) or C2 (18%)	More likely to be C1 (28%), D (9%) or E (5%)	More likely to be C1 (27%)
Household composition	More likely to live with children and at least one other adult (56%)	More likely to live with no children but at least one other adult (51%)	More likely to live alone (17%)
Disability	More likely to have a disability (27%)	More likely to have no disability (87%)	More likely to have no disability (88%)

BMG Research GOC 2015 Contact Lens Survey

Region	More likely to live in London (31%) and urban areas (90%)	More likely to live in the North West (14%), South West (8%) or Yorkshire and The Humber (11%)	No significant difference vs average
Output Area Classification	More likely to be cosmopolitans (14%), ethnicity central (19%) or multicultural metropolitans (19%)	More likely to be suburbanites (22%) or hard pressed living (17%)	No significant difference vs average
Level of deprivation	More likely to be in the most deprived quartile (32%)	More likely to be in the least deprived quartile (26%)	No significant difference vs average
Internet use	More likely to use the internet several times per week (15%)	More likely to use the internet daily (93%)	More likely to use the internet daily (93%)
Social media use	More likely to use Facebook (99%), Twitter (97%), YouTube (100%) and LinkedIn (88%)	More likely to never use Facebook (28%), Twitter (69%), YouTube (21%) or LinkedIn (78%)	More likely to use Facebook (92%) and YouTube (94%), and never use LinkedIn (55%)
Buy products online	More likely to buy products online all the time (43%)	More likely to buy products online regularly (63%), infrequently (17%) or rarely (5%)	No significant difference vs average

Appendix: Statement of Terms

Compliance with International Standards

BMG complies with the International Standard for Quality Management Systems requirements (ISO 9001:2008) and the International Standard for Market, opinion and social research service requirements (ISO 20252:2012) and The International Standard for Information Security Management ISO 27001:2005.

Interpretation and publication of results

The interpretation of the results as reported in this document pertain to the research problem and are supported by the empirical findings of this research project and, where applicable, by other data. These interpretations and recommendations are based on empirical findings and are distinguishable from personal views and opinions.

BMG will not publish any part of these results without the written and informed consent of the client.

Ethical practice

BMG promotes ethical practice in research. We conduct our work responsibly and in light of the legal and moral codes of society.

We have a responsibility to maintain high scientific standards in the methods employed in the collection and dissemination of data, in the impartial assessment and dissemination of findings and in the maintenance of standards commensurate with professional integrity.

We recognise we have a duty of care to all those undertaking and participating in research and strive to protect subjects from undue harm arising as a consequence of their participation in research. This requires that subjects' participation should be as fully informed as possible and no group should be disadvantaged by routinely being excluded from consideration. All adequate steps shall be taken by both agency and client to ensure that the identity of each respondent participating in the research is protected.

With more than 30 years' experience, BMG Research has established a strong reputation for delivering high quality research and consultancy.

BMG serves both the public and the private sector, providing market and customer insight which is vital in the development of plans, the support of campaigns and the evaluation of performance.

Innovation and development is very much at the heart of our business, and considerable attention is paid to the utilisation of the most up to date technologies and information systems to ensure that market and customer intelligence is widely shared.

