# How satisfied are customers with UK Opticians?

A YouGov report commissioned by CooperVision®

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What the world thinks

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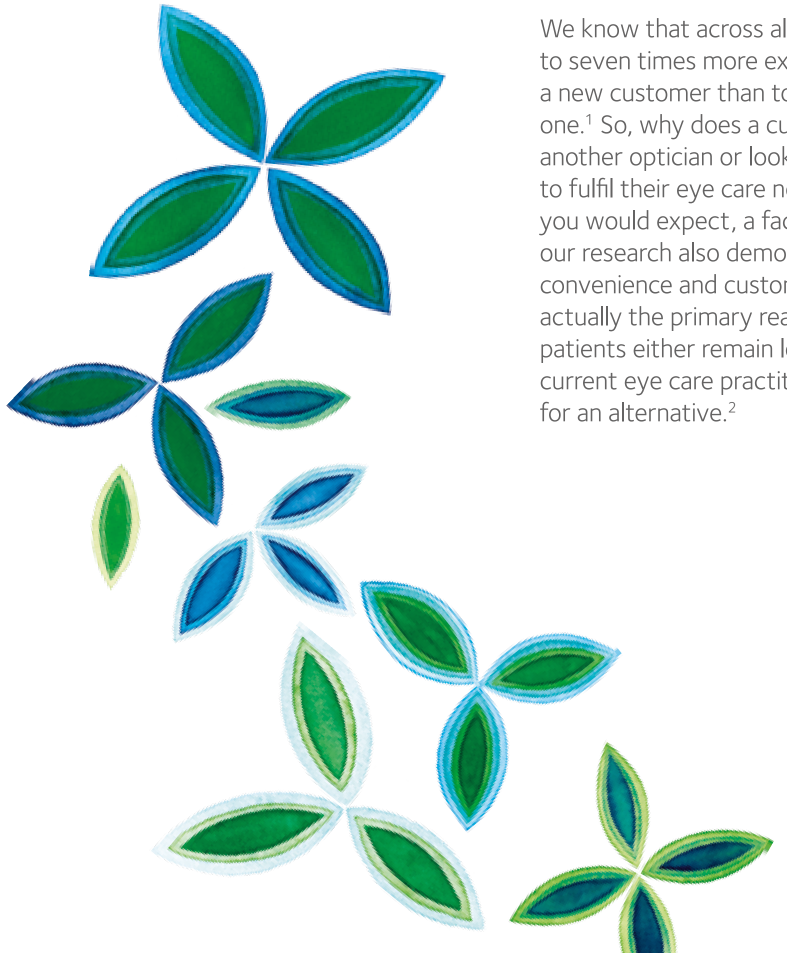
# Contents

# Foreword

## Why does customer service matter?



At CooperVision, we're committed to helping practices to build a successful business through customer loyalty and retention.

We know that across all industries it is six to seven times more expensive to acquire a new customer than to retain an existing one.[1] So, why does a customer switch to another optician or look for other ways to fulfil their eye care needs? Price is, as you would expect, a factor. However, our research also demonstrated that convenience and customer service are actually the primary reasons why patients either remain loyal to their current eye care practitioner or look for an alternative.[2]

Since customer service is so crucial, we commissioned YouGov – a highly respected and independent research body – to investigate and report on the current level of customer service across practices in the UK.

We hope that you find the results, insights and learning points to be beneficial in growing your business.

**CooperVision**

1. Bain and Company.
2. Understanding Switchers. September 2013.



# Executive summary

This report focuses on customers of UK practices; who they are, how they choose an optician and the factors that affect their overall customer experience. It then outlines a number of different metrics of customer service, such as trust and satisfaction. This is then benchmarked against the wider high street.

All of this information is split by spectacle and contact lens wearers. It's also broken down by optician type – high street chains, small chains and independent practices.

The overall picture for UK practices is that the level of service they offer is very good. It stands up exceptionally well against other high street retailers. However, in order to maximise customer loyalty there are areas for improvement, such as aftercare and the levels of staff knowledge.

# YouGov summary

What was fascinating to see from the customer service evaluation research is that there is a clear distinction between expectations and evaluations depending on the type of optician destination visited.

It could perhaps have been predicted that we would have seen greater satisfaction scores when we looked at independent optician practice data versus that of high street chains, but what was remarkable to see was how much 'staff' played a role in the choice of destination. Double the number of customers visited an independent optician practice due to 'staff related' reasons when compared with high street chains, proving the importance this holds in creating a high level of customer satisfaction for specific segments of the market.



Despite the general consensus showing trust to be high and consumers driven by good customer service, one surprising finding was the proportion of 'high street chain' visitors who tend to be extremely price-led. Perhaps worryingly, some consumers will place monetary factors above and beyond the trustworthiness of their practitioner and the safety of their eyes.

Finally, and maybe most importantly, it is significant to see the power of optician customer service levels and how they currently outperform the vast majority of the high street. Only John Lewis, the epitome of customer service, fared better when asked to rank levels of customer satisfaction. So it must be said, that for many, the current customer service provided is at a level not experienced elsewhere on the high street. However, with destination choice being so important, it is something that practitioners must be aware of and continue to improve upon where possible, in order to engage with new and existing customers.

**Richard Moller**
Associate Director, YouGov

YouGov
What the world thinks

# Methodology

The research was achieved by conducting an online quantitative survey that was open to the YouGov panel of 432,000+ individuals.

The total sample examined was 1,222 respondents, made up of 1,064 spectacle wearers, 797 contact lens wearers and 109 people who wear neither but who have had an eye test in the previous 12 months.

Results were representative of, and split by, high street chains, small chains and independent practices.

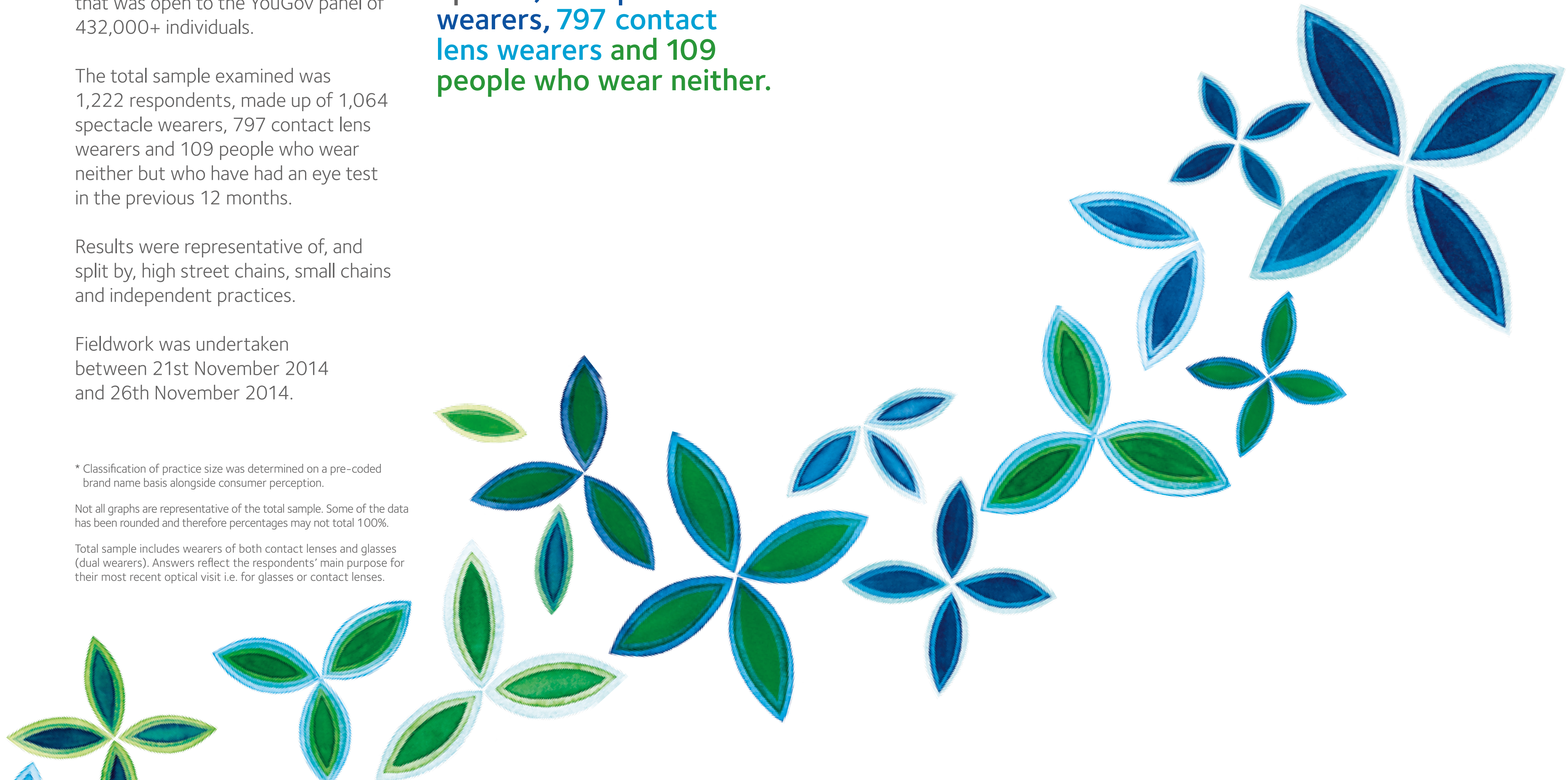
Fieldwork was undertaken between 21st November 2014 and 26th November 2014.

**1,222 respondents made up of: 1,064 spectacle wearers, 797 contact lens wearers and 109 people who wear neither.**

* Classification of practice size was determined on a pre-coded brand name basis alongside consumer perception.

Not all graphs are representative of the total sample. Some of the data has been rounded and therefore percentages may not total 100%.

Total sample includes wearers of both contact lenses and glasses (dual wearers). Answers reflect the respondents' main purpose for their most recent optical visit i.e. for glasses or contact lenses.





# Breaking down customer service

### Knowing the customer

- Understanding the make-up of customers
- Understanding how they choose an optician
- How they like to be communicated to
- Frequency of visit and where they go.

### Understanding drivers of customer satisfaction

- Waiting times (in practice)
- Waiting times (for product).

### Metrics for customer service and loyalty

- Level of trust
- Level of satisfaction
- Propensity to recommend (promoter score)
- Comparative service.

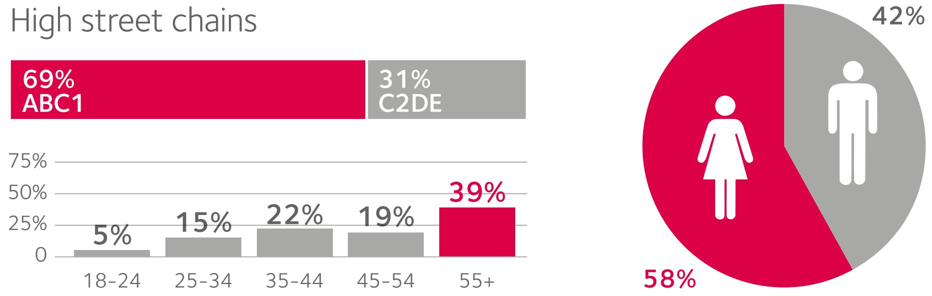
# Knowing the customer



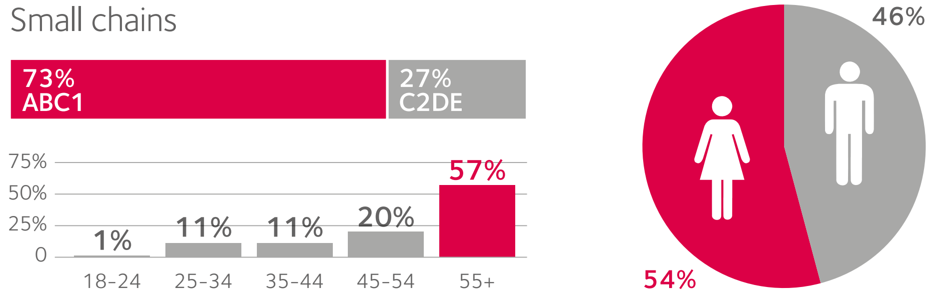
# Understanding the make-up of customers

Across all three types of optician, people aged over 55 make up the largest proportion of the customer base.

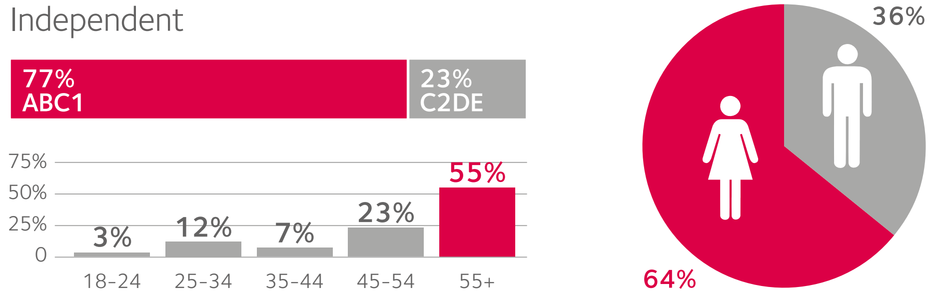
## High street chains




## Small chains



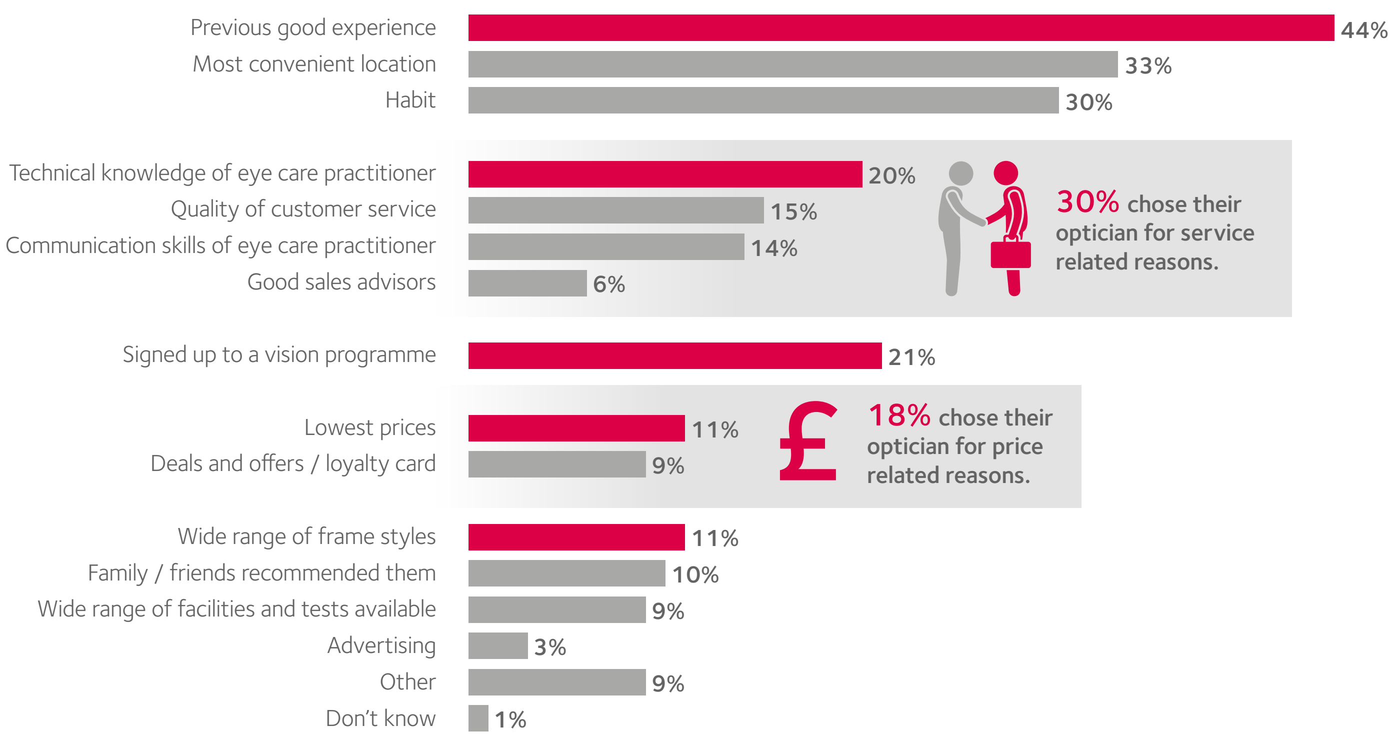

## Independent



# Understanding what's important to customers when choosing an optician is key

The results clearly demonstrate that customer service far outweighs price when choosing an optician.

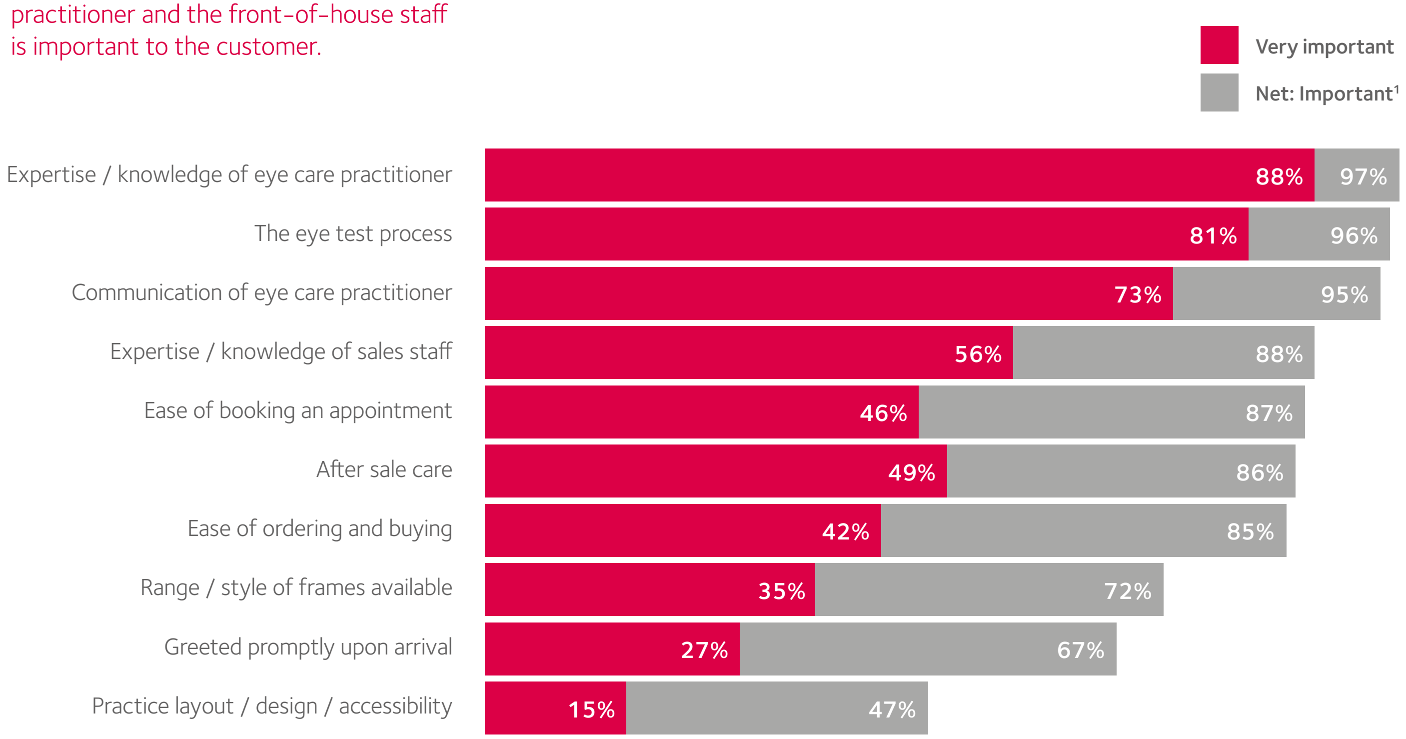
Reasons for choosing their optician






# Which elements of customer service matter most?

The results show that along with the test process and communication, the level of expertise demonstrated by the eye care practitioner and the front-of-house staff is important to the customer.



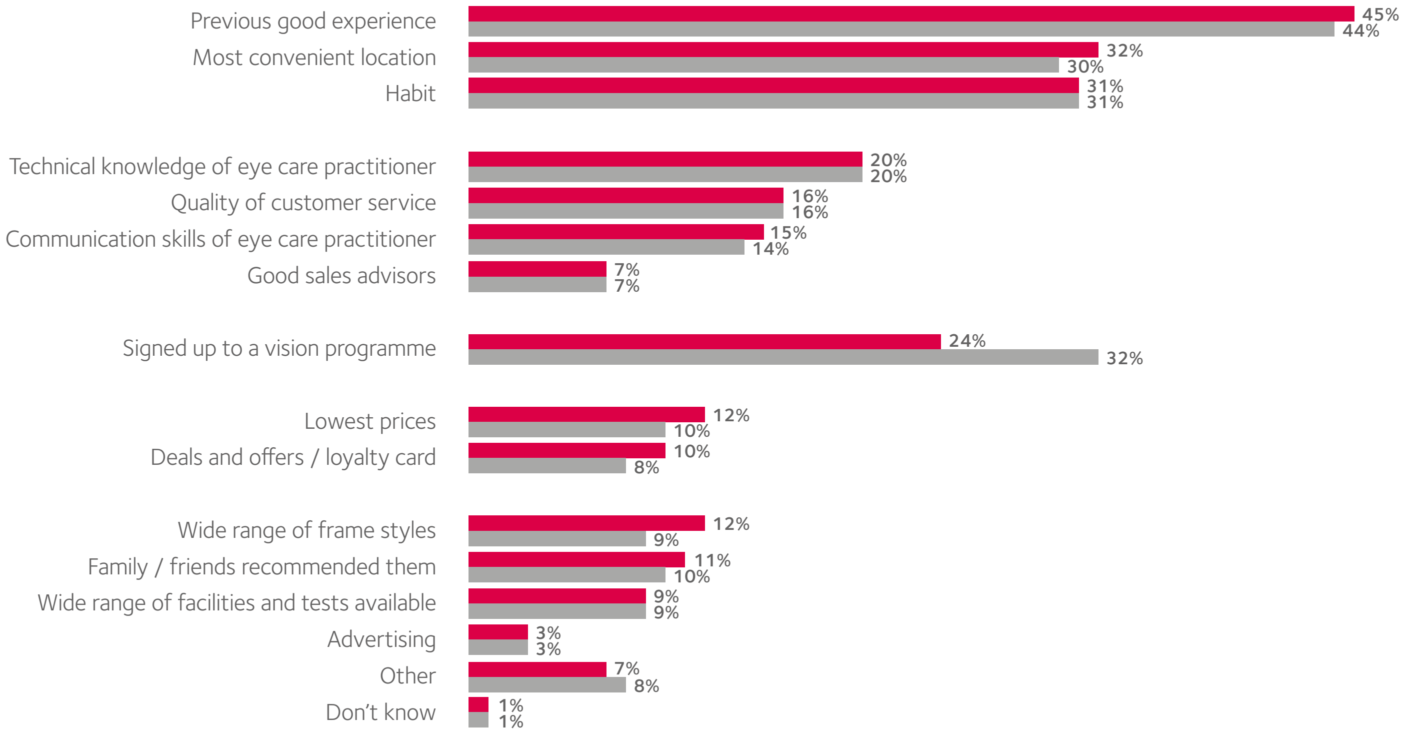

1. Net: Trust is made up of both 'definitely trust' and 'somewhat trust' answers.

# Spectacle wearers and contact lens wearers both value customer service

For contact lens and spectacle wearers, the customer experience is far more important than price when choosing an optician.

Spectacle wearers
Contact lens wearers

## Reasons for choosing their optician

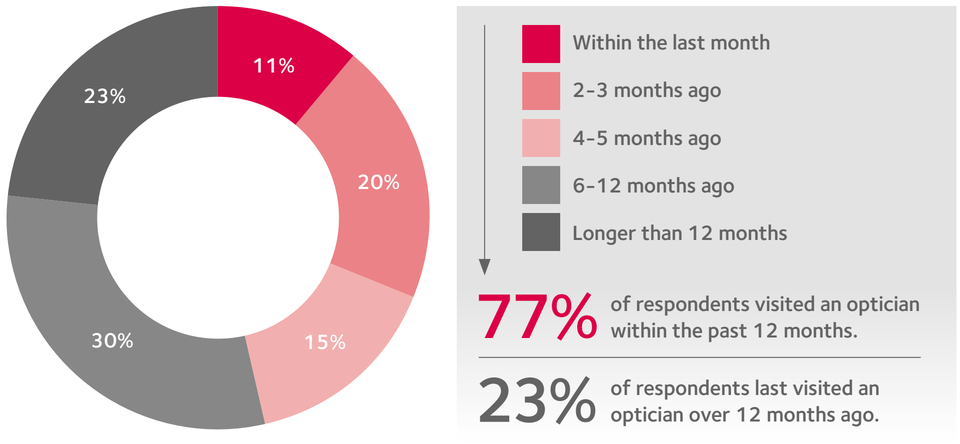




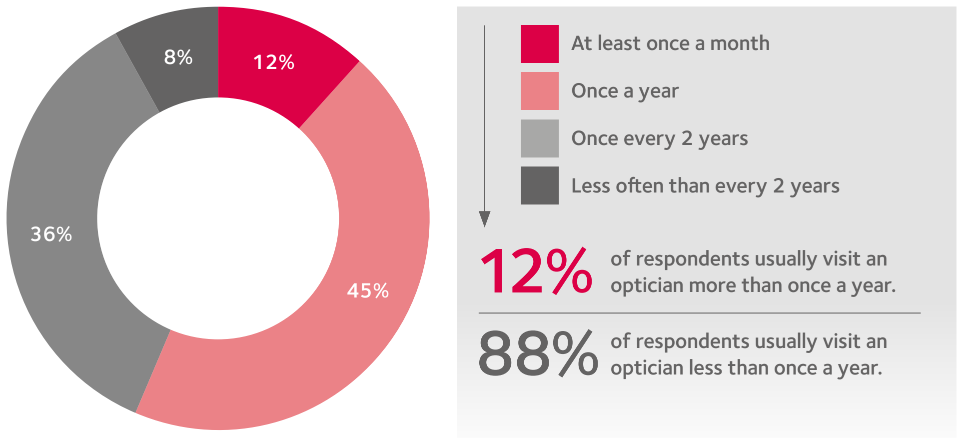

# Communication issues

Unlike most high street retailers, face-to-face contact between practices and customers only tends to be once every 1–2 years.

## Most recent optician's visit




## Optician visit frequency

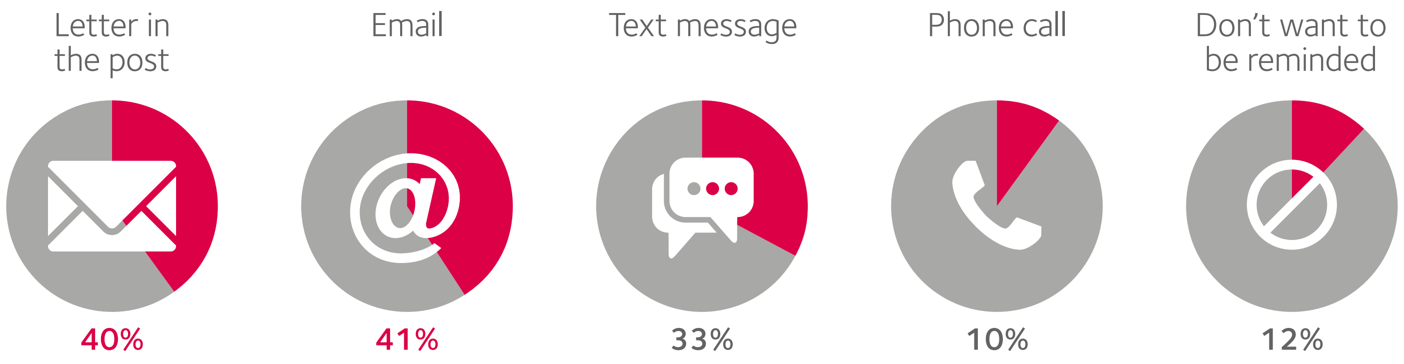


# Communication is important to a number of customers

Customers want to be reminded about appointments, with email and post being the preferred methods of communication. This reinforces the need for up-to-date customer information.

## Preferred reminder methods[1]

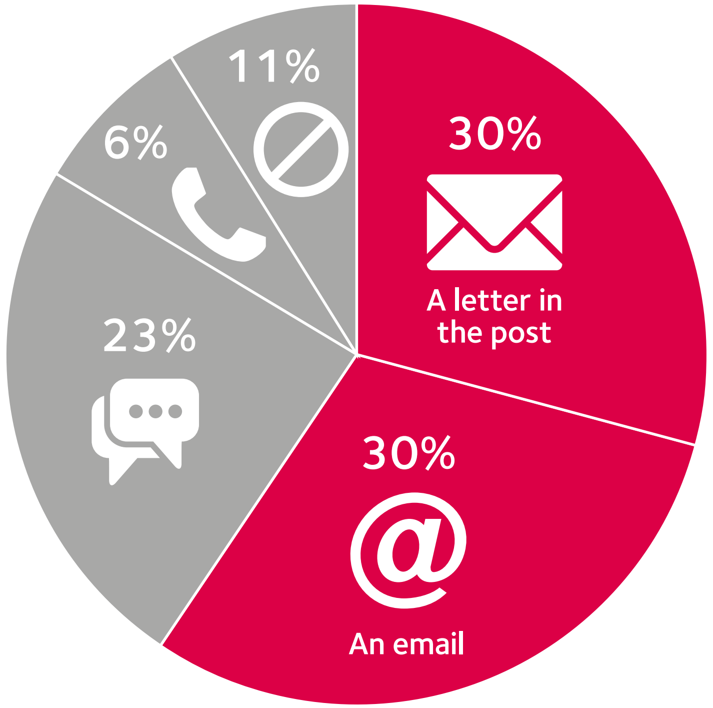
Emails and letters are the preferred ways to be reminded about an eye test.




1. Responders were asked to select their preferred reminder methods from a multiple choice selection.



## **Most** preferred appointment reminder method[2]




## Appointment booking behaviours

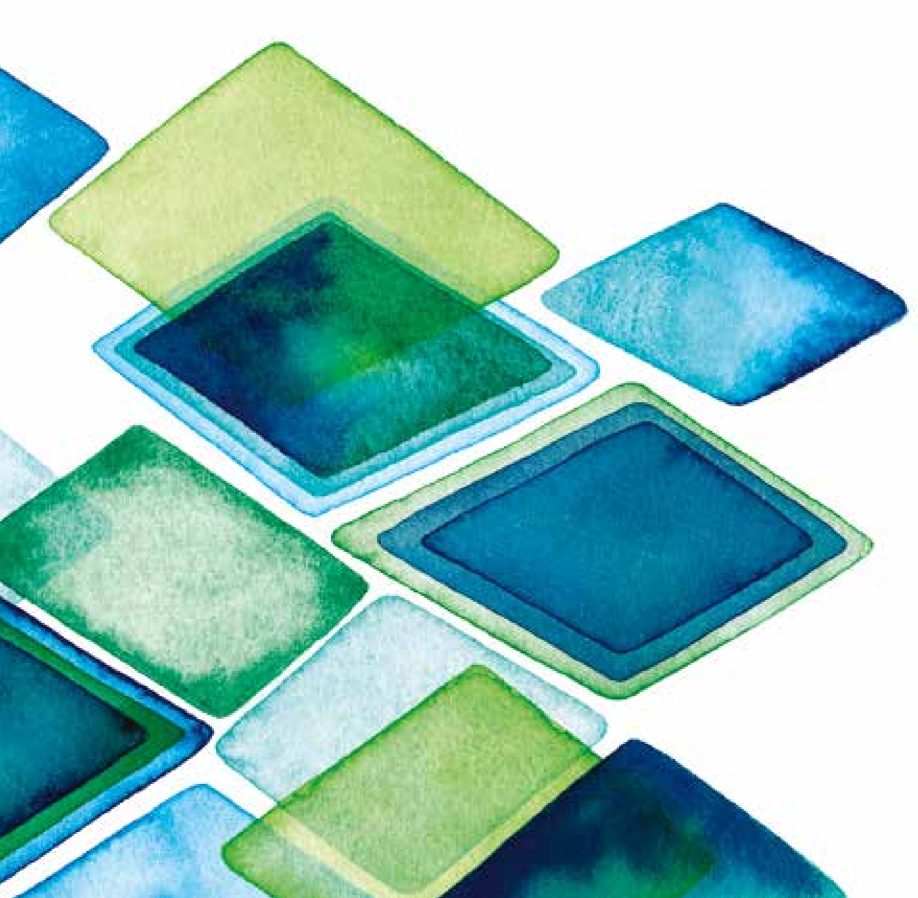
**88%**
had booked an appointment for their most recent visit versus walking in...

...of those

**93%**
booked the appointment themselves.

2. Where the responders could only pick one reminder method.

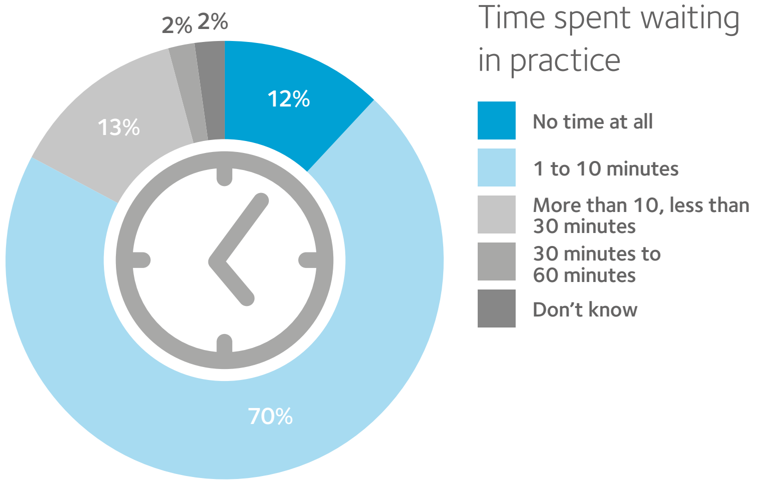
# Understanding drivers of customer satisfaction





# Waiting time in practice has a direct influence on service perception

Customers consider a waiting time of longer than 10 minutes to be poor customer service.



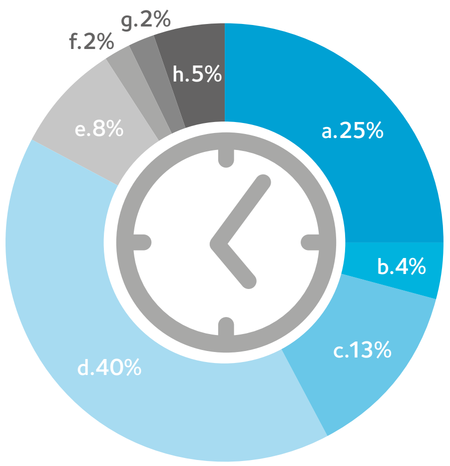

**82%** of customers were seen by an eye care practitioner within 10 minutes of arriving in practice.

**24%** of those who came without an appointment were more likely to be seen immediately.

**53%** of those who waited longer than 10 minutes said that this was an unacceptable timespan to wait.

# Waiting time for products also affects service perception

Customers accept that they may not leave with contact lenses immediately after being prescribed them and the vast majority are happy to wait for them.




Time spent waiting for contact lenses after placing the order

- a. Left the practice with them
- b. Within 24 hours
- c. Within 48 hours
- d. Up to a week
- e. Up to a fortnight
- f. Up to a month
- g. Longer than a month
- h. Don't know

## Other experiences of buying contact lenses

**53%** of those who bought contact lenses waited a week or longer to receive them.

**85%** of those who waited a week or longer said that this was an acceptable timespan to wait.

**58%** of those who bought contact lenses collected them in practice.

**32%** had them delivered free to their house / work.

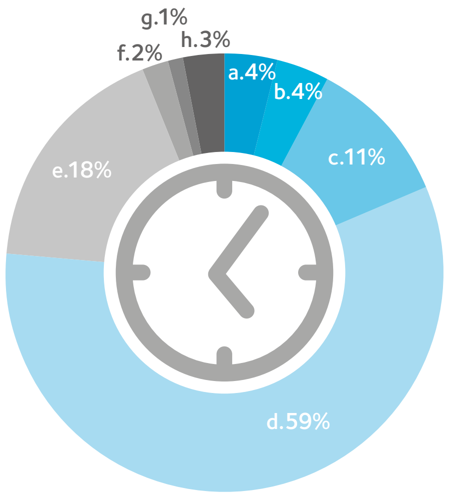
**45%** usually pay by credit / debit card.

**45%** usually pay by direct debit.

**10%** usually pay by cash.



# The wait time for spectacles is longer than contact lenses




Time spent waiting for spectacles after placing the order

- a. Left the practice with them
- b. Within 24 hours
- c. Within 48 hours
- d. Up to a week
- e. Up to a fortnight
- f. Up to a month
- g. Longer than a month
- h. Don't know

## Other experiences of buying spectacles

**79%** of those who bought spectacles waited a week or longer to receive them.

**78%** of those who waited a week or longer said this was an acceptable timespan.

**94%** of those who bought spectacles collected them in practice.

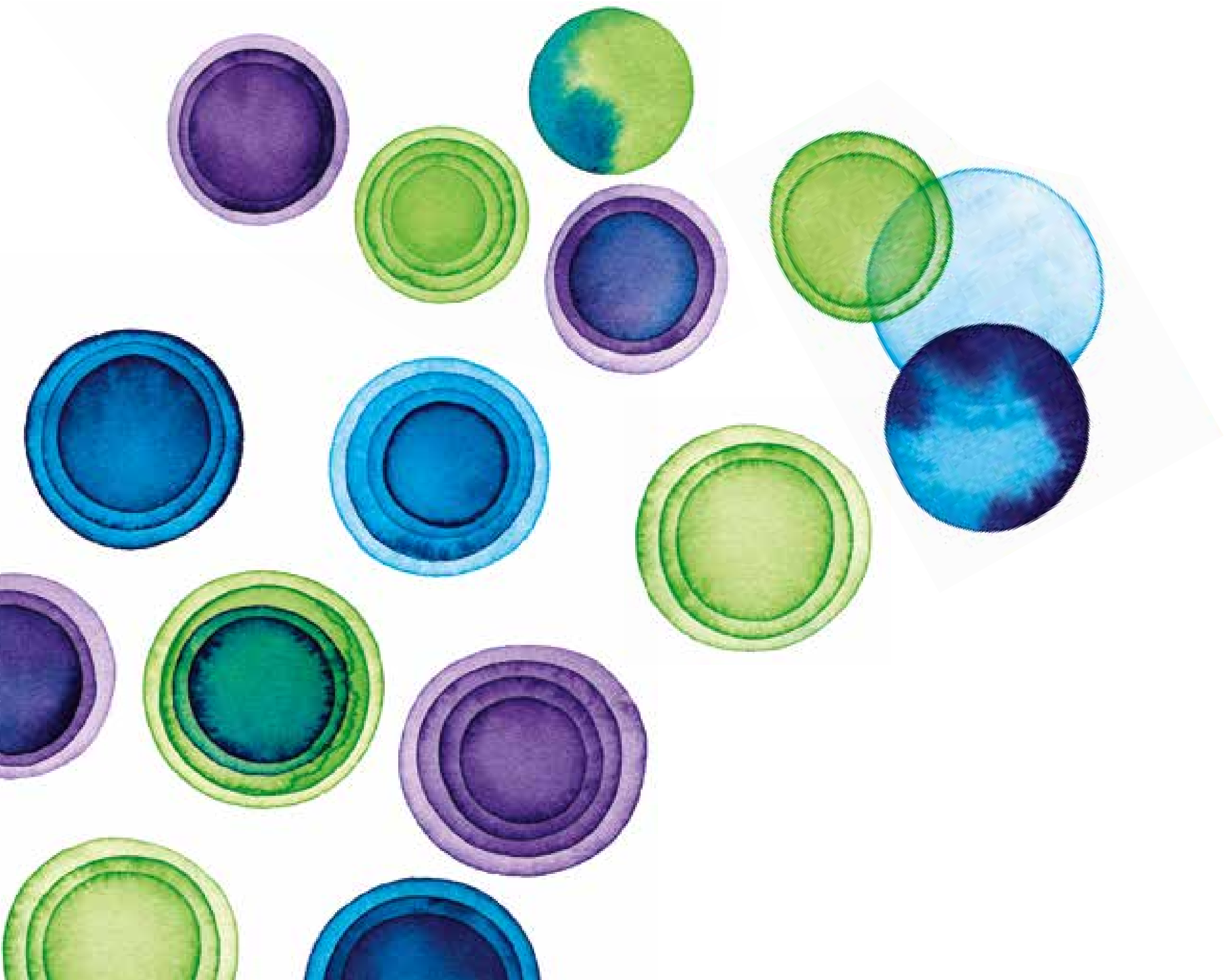
**84%** paid by credit / debit card.

**10%** paid in cash.

**5%** other / don't know.

**1%** instalments through a payment plan.

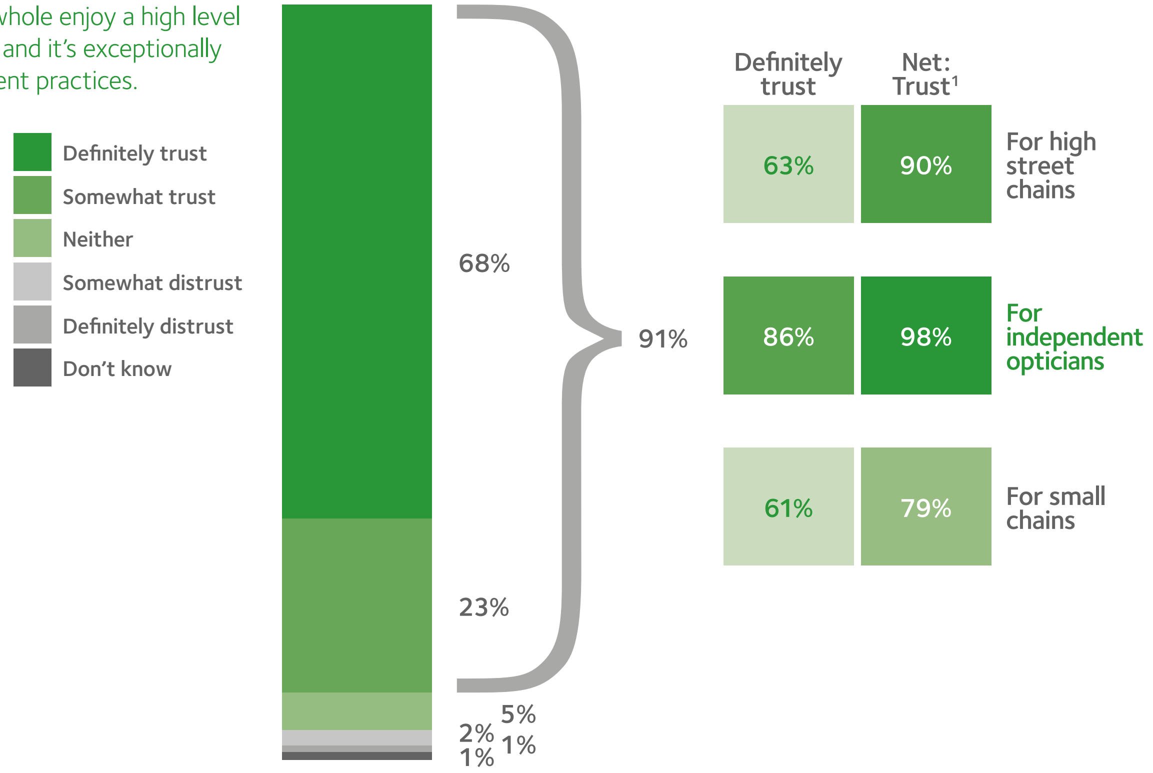
# Metrics for customer service and loyalty





# Trust is a strong indication of customer satisfaction

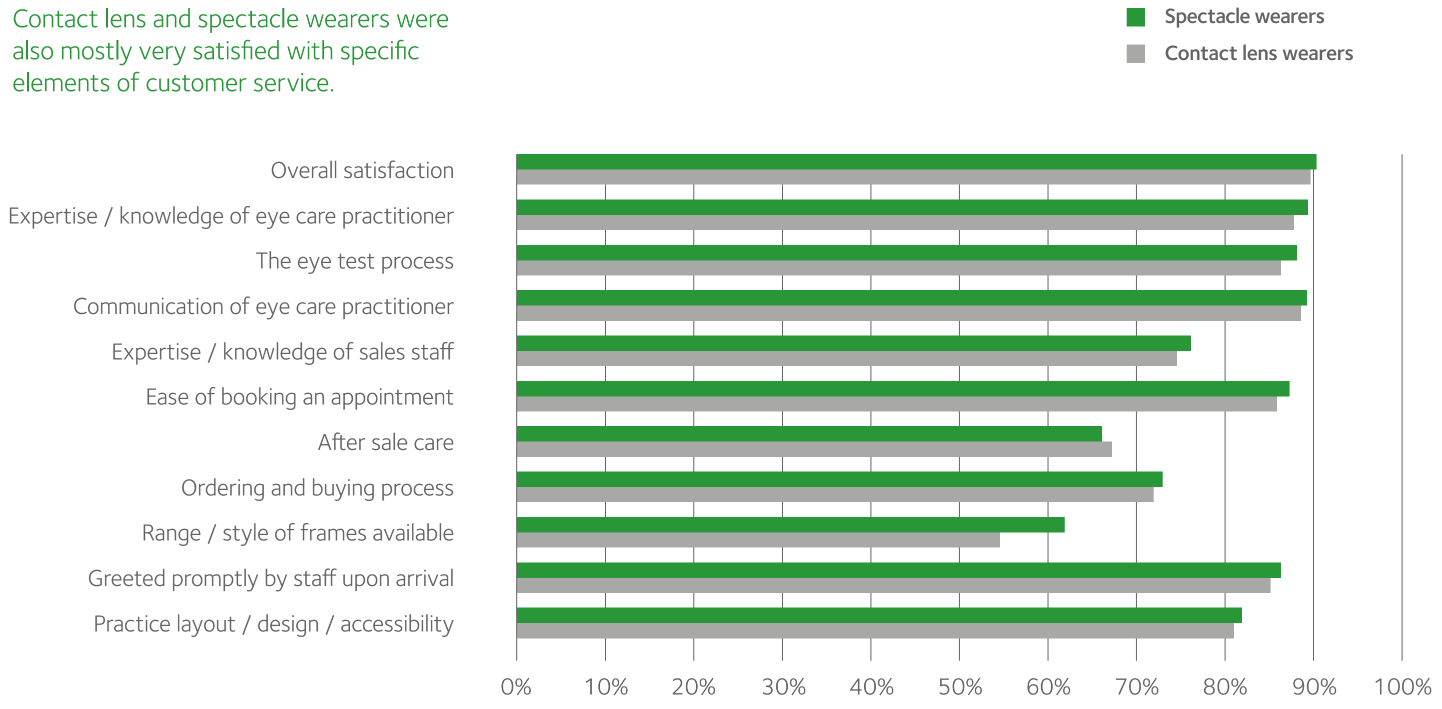
Opticians on the whole enjoy a high level of customer trust and it's exceptionally high for independent practices.




1. Net: Trust is the combined 'definitely trust' and 'somewhat trust' answers.

# Overall levels of satisfaction are very high amongst both customer types

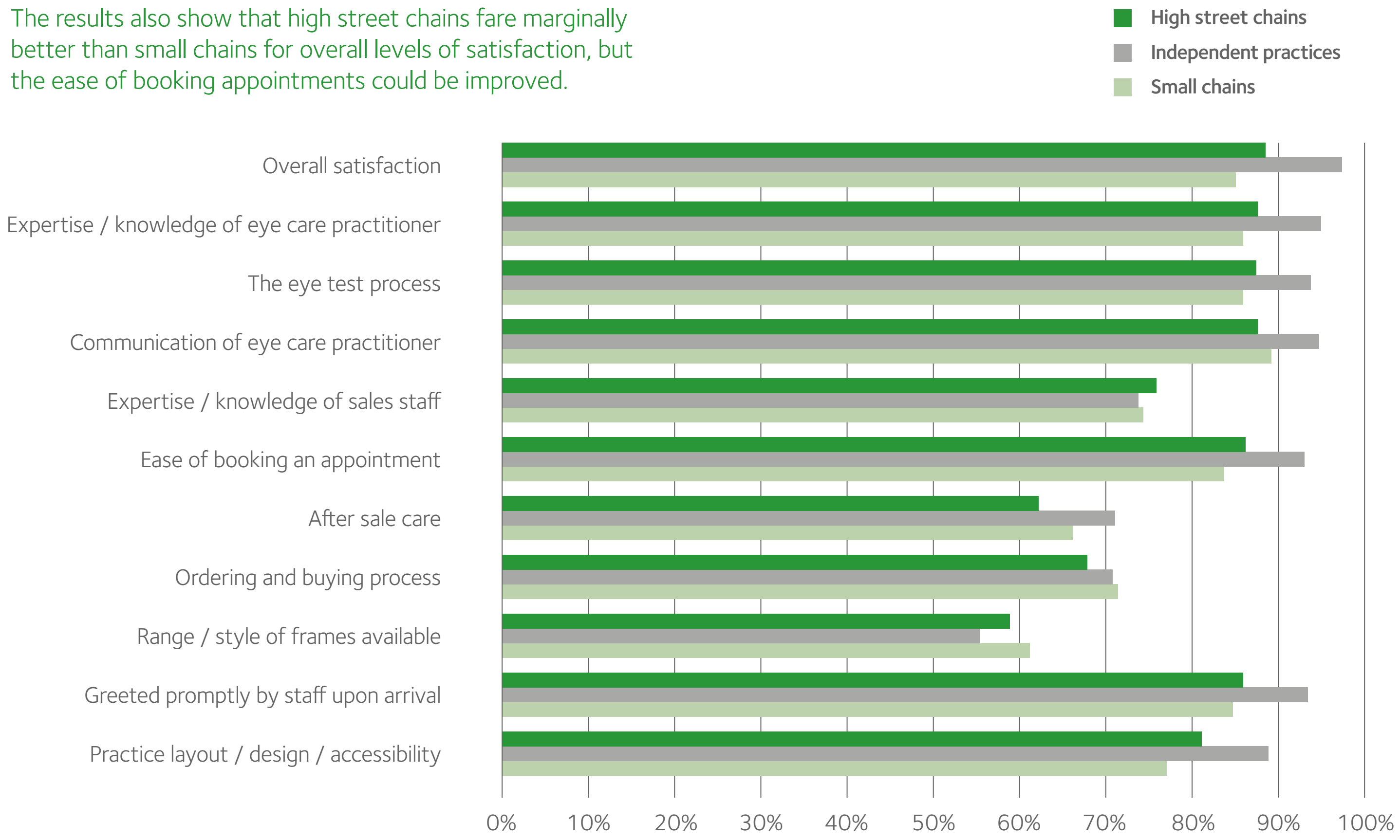
Contact lens and spectacle wearers were also mostly very satisfied with specific elements of customer service.






# Independent practices are achieving the highest levels of customer satisfaction

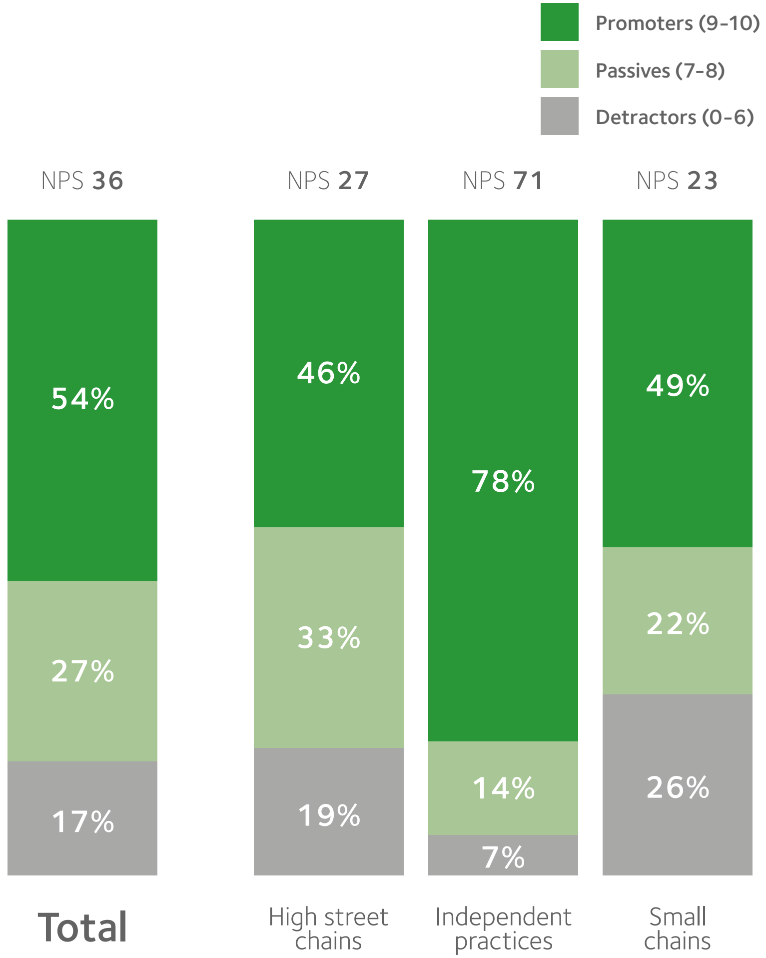
The results also show that high street chains fare marginally better than small chains for overall levels of satisfaction, but the ease of booking appointments could be improved.



# A net promoter score (NPS) quantifies overall satisfaction by looking at the likelihood to recommend

The table below shows the highest NPS scores for select brands in the UK.

| Company | NPS |
|---|---|
| Apple – Computer Hardware | 67 |
| First Direct – Banking | 61 |
| LG – Television | 39 |
| Samsung – Television | 35 |
| Sony – Computer Hardware | 30 |



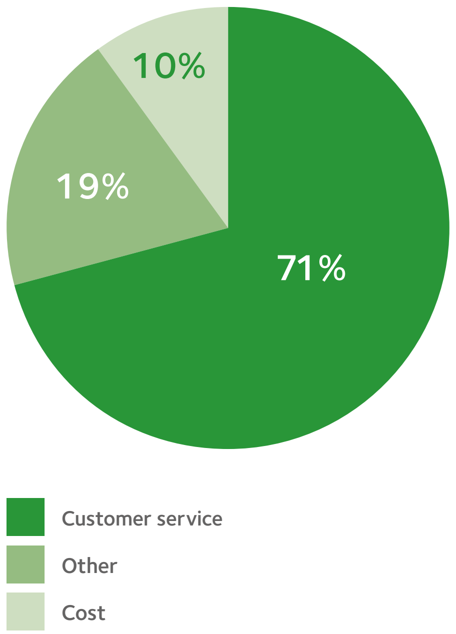

Responders ranked their likelihood to recommend on a scale of 1–10.
Net promoter score is calculated by subtracting detractors from promoters.
Source: Satmetrix Net Promoter industry benchmark report 2011.



# Why would people not recommend?

A high NPS is, of course, very positive. However, it's also helpful to understand the reasons why people would not recommend.

Customer service is overwhelmingly the reason why people would not recommend, with price rarely the reason. This demonstrates again how crucial good customer service is.




Of the 71% the specific reasons for not recommending due to customer service broke down as follows:

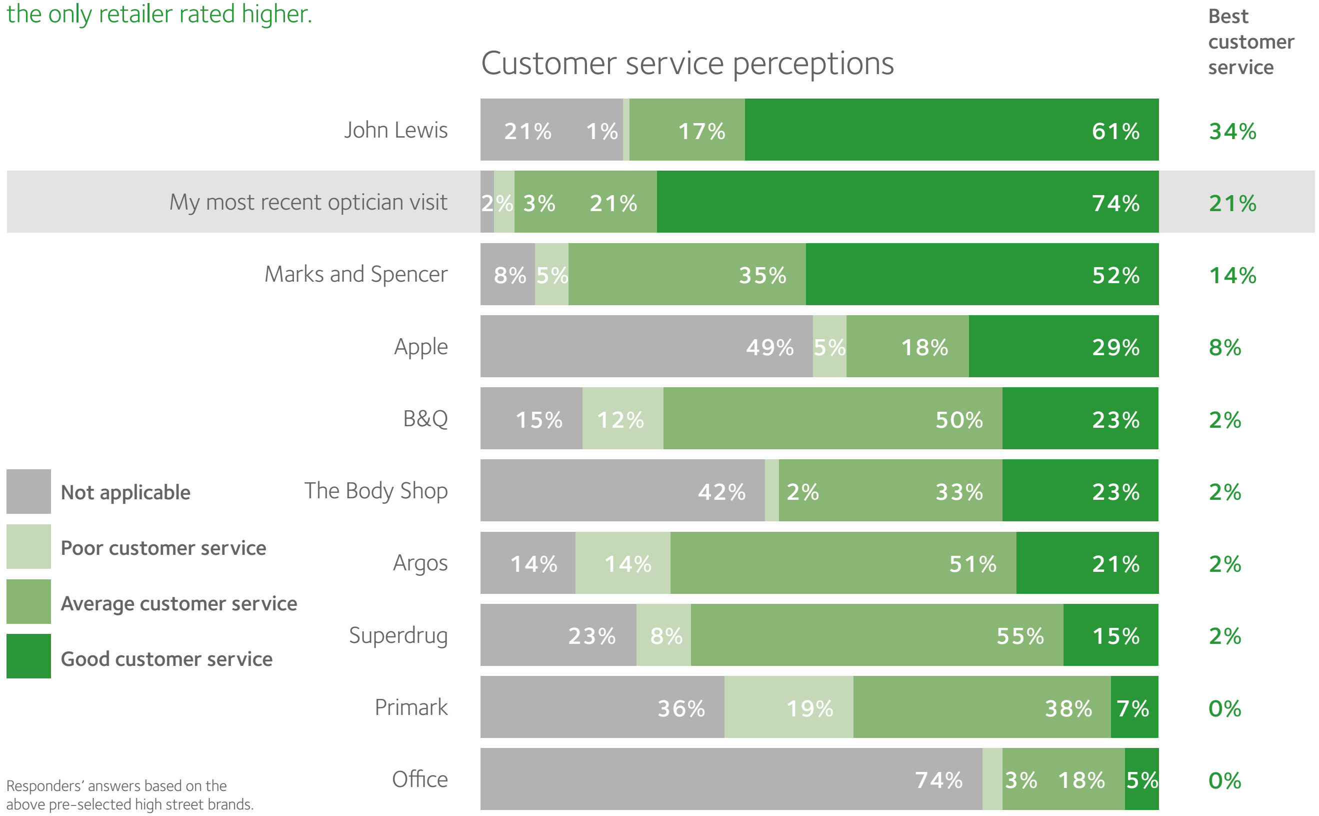
**50%** made a specific comment about the level of customer service in practice (front-of-house staff were often mentioned).

**8%** would not recommend as they found the process 'too salesy'.

**13%** felt the optician did not listen to them and did not meet their needs.

# How do opticians fare when benchmarked against other retailers?

Opticians fare exceptionally well when their customer service level is benchmarked against the high street, with John Lewis the only retailer rated higher.




Responders' answers based on the above pre-selected high street brands.



# Learning points

## Expertise is everything

Eye care practitioner expertise is the primary factor when choosing an optician but communication and the knowledge / expertise of the front-of-house staff are also important.

## Customers value communication

Customers are happy to receive communication from their optician when reminding them about an appointment. To maintain high levels of customer service it's essential to understand a customer's preferred method of communication and hold up-to-date contact information.

## Contact encourages loyalty

Face-to-face contact with customers tends to be once every 1-2 years. Finding ways of maintaining contact with customers outside of appointment reminders will encourage customer loyalty.

## Managing customer expectations is important

10 minutes was the magic number for waiting times – any longer was considered a poor customer experience. Practices can mitigate against this by keeping customers informed (for example, by text) if they should expect a wait of 10 minutes or more.

## Customer satisfaction is at a high level

Overall, levels of customer satisfaction were high, but striving for even better will encourage greater customer loyalty. The two areas that were ranked the lowest, and therefore need the most urgent attention, are the knowledge of the sales staff and after sales care.

## Customers value a personal approach

Independent practices scored highest against all customer service benchmarks. The customer service levels for high street practices were also high, but they could learn from the overall customer experience provided by independents. The feeling of being on a conveyor belt was cited as a factor, so providing a more personal service should be a priority for high street practices.

# Professional opinion

"This report is comprehensive, easily digestible, giving a terrific insight, and possibly even the answers to keeping our customers satisfied.

As the owner of a leading independent practice I am perhaps more interested in our weaknesses rather than our strengths. This report enables me to target those areas where I believe we can make improvements.

I've now seen the evidence for what I have known for the past 35 years of independent practice.

Customers want to see a likeable, knowledgeable professional that they can trust, somewhere where they feel comfortable, are known as an individual and can return year after year."

**Christopher Nixon**
MANAGING DIRECTOR –
CHRISTOPHER NIXON OPTOMETRISTS

"Customer service involves the entire customer journey through the whole practice including a practice's appearance, its staff, the clinical expertise available and managing patient expectations. If any of a patient's expectations aren't met then the likelihood of recommendation is reduced.

The most loyal patient is one where any issue that may arise is resolved to their satisfaction – this requires an honest, competent, professional and skilled practitioner to help deal with any problems.

As the research highlights, trust is the most important quality in any patient / practitioner relationship. However, a large proportion of the industry is still too focused on selling spectacles and being incentivised to prescribe to patients. That being said, the survey does seem to reflect the changing attitudes of independent practices shifting towards a more realistic professional fee charging to help increase this trust."

**Mike Killpartrick**
OPTOMETRIST –
ELLIS & KILLPARTRICK

"As an independent practice, we have seen first hand an increase in appointments after asking our customers how they would like to be reminded that they are due for an examination.

Well done CooperVision for commissioning this report. Excellent customer service is how we can grow our businesses and continue to look after our patients' eyes."

**Hayley Wainer**
OPTOMETRIST –
HAWKES & WAINER

"Unexpected health complications or late arrival will always affect subsequent appointments and the key to maintaining customer satisfaction is to ensure clients are kept informed at every stage throughout their journey within the practice."

**Marc P Karbaron**
DISPENSING OPTICIAN / OWNER –
OPTIX AT BROADGATE

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