

# Our annual review

2024 | 2025



Specsavers

WHY



**To change lives  
through  
better sight  
and  
hearing**



HERE

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# Our purpose

## Reflecting on 40 years of care

We knew 2024 - our ruby anniversary celebration - was going to be a year to remember. But we never could have imagined that we would see so many amazing achievements to mark such a significant milestone. To highlight just a few:

We were named the **16th Best Workplace in the world**, the **8th Best Workplace in Europe**, and certified as a Great Place to Work® in all participating countries.

We opened our **1,000th store** in the UK and Ireland, in Harpenden, England.

Our ophthalmology business, **Newmedica**, again achieved a near-perfect score with 99% of patients rating their experience as good or very good overall.

We handled **1.75 million customer feedback responses** for our global optics businesses alone.

In our newest territory, Canada, **we expanded further** by moving into a fourth province, Manitoba.

In Northern Europe, **partners' satisfaction scores reached a record high**, 15% above the benchmark.

We dispatched our **60 millionth customer order** from Melbourne Glazing Services in Australia.



And, as we continue to work closely with our partners to provide the best-value, highest standards of optometry, audiology and ophthalmology services to everybody, our teams cared for more than 48 million customers and patients worldwide.

But for us, it's not about the numbers. It's about reflecting on all the fantastic things our partners and colleagues do, every day, as part of our unique family. It's about the wonderful way they treat each other, how they live our values, and how they help to make Specsavers somewhere everyone feels welcome and proud to belong. And above all, it's about how they use their skills, expertise and compassion to help change lives through better sight and hearing. We simply couldn't be prouder of everything that they've achieved throughout the past four decades.

In this review, we're delighted to share just some of their collective achievements, as we build on our years of success around the globe:

**Continuing our growth across new and established markets,** with a renewed emphasis on customer experience and choice through our Blended Experience ambitions.

**Making Specsavers a place where our people feel ever more valued,** while continuing to invest in skills and capabilities development to ensure we're fit for the future.

**Delivering world-class products and services across our clinical and retail environments,** with a relentless commitment to outstanding value and expertise for our customers in an increasingly challenging economic climate.

**And ensuring we do all this in a sustainable way,** by consistently making the right choices for the people we care for and work with, the communities we serve, and the planet we all share.

So thank you to all our colleagues and partners worldwide, for your tireless hard work and determination to do the very best for our customers and each other. No matter your role, or where you work, you've made everything within these subsequent pages possible.



**Doug Perkins CBE**  
Chairman and Founder



**Dame Mary Perkins**  
Founder

# Our growth

Figures as at the end of February 2025

Group revenue

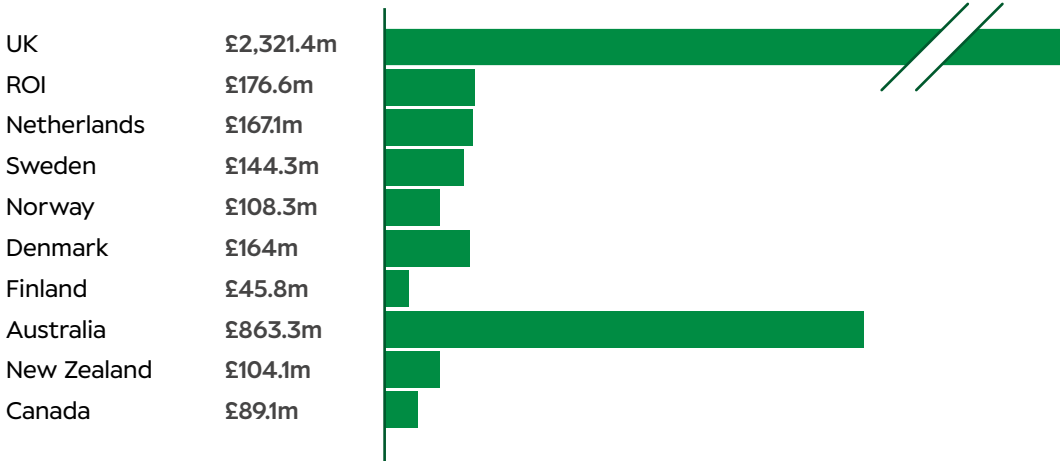
£4.18 billion

Growth on 2023/24

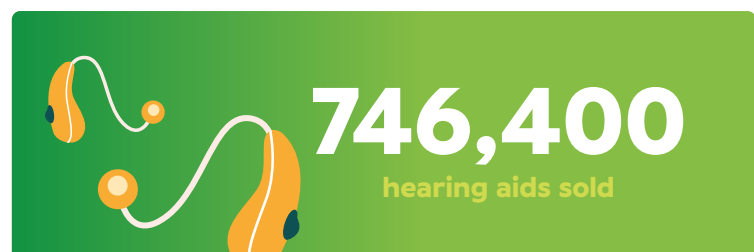
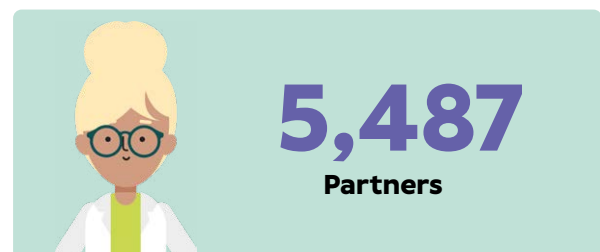
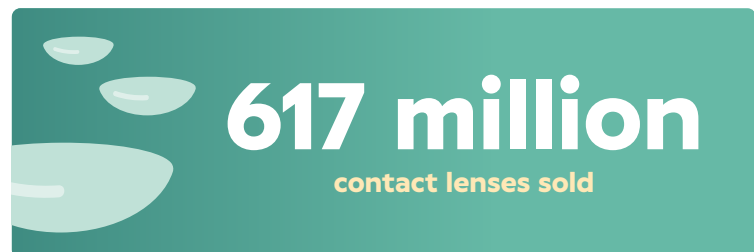
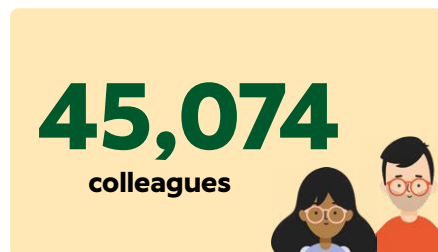
7.5%\*

\*Comparatives adjusted to constant foreign exchange rates

Revenue by market



# Our facts and figures



# Our businesses

Key:

**Optical**

**Audiology**

**Domiciliary**

**Newmedica**

UK **937** | **279** | **56**

**22** (services across  
36 locations)

ROI **66** | **24**

Norway **84**

Finland **52**

Sweden **121**

Denmark **79**

Netherlands **143** | **141**

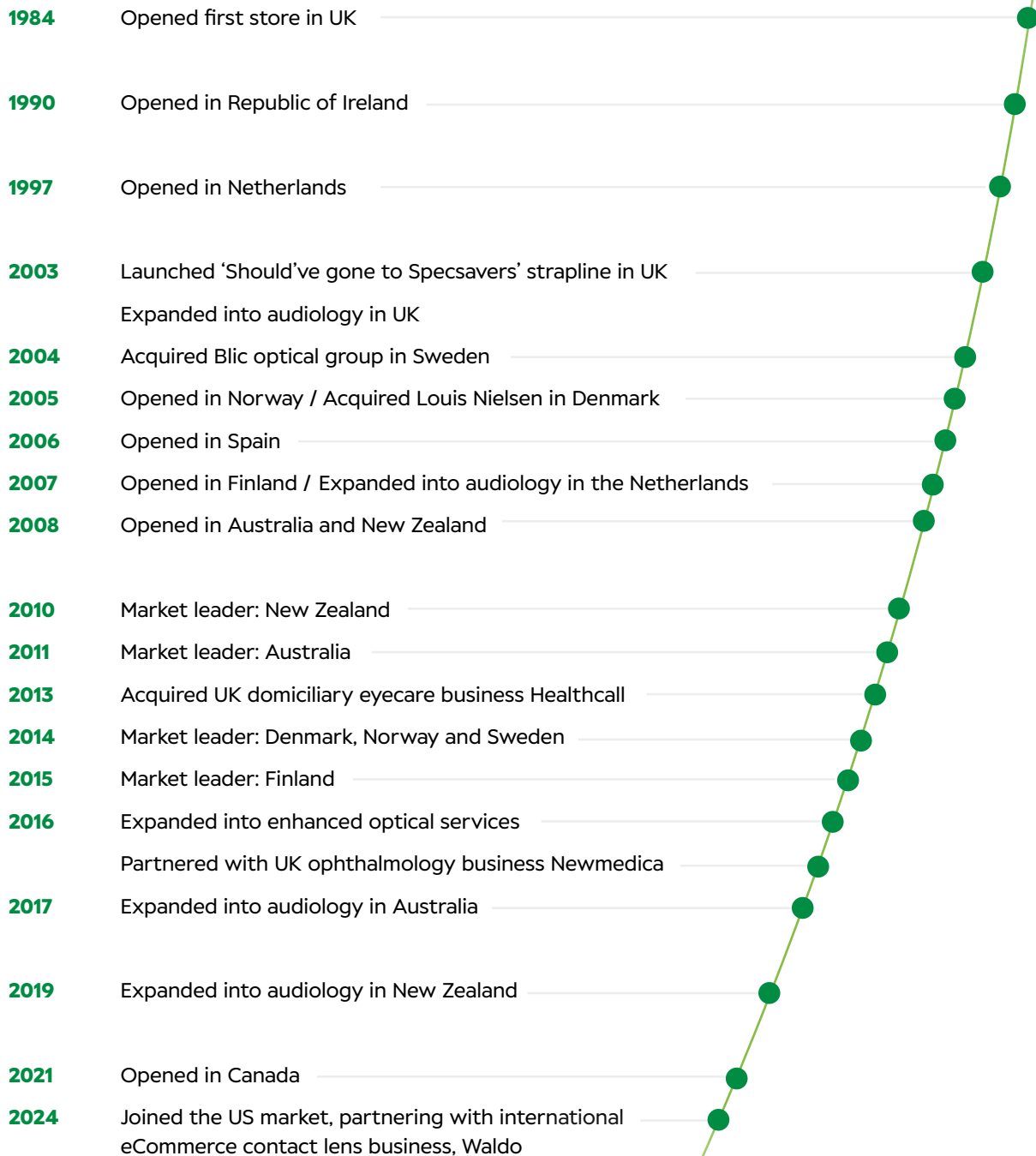
Australia **393** | **178**

New Zealand **61** | **28**

Canada **151**



# Our story so far



# Our people

Being the place we are all  
proud to belong

Specsavers is built on great people. Our success is driven by the dedication, energy and passion of our 50,000-strong team across our stores, support offices and manufacturing and distribution sites.

Guided by our people ambition – to be the place we're all proud to belong – we strive to create an environment where everyone can bring their best self to work and be inspired by our vision to change lives through better sight and hearing. We work hard to foster a culture of inclusivity, collaboration and growth; nurturing our talent and equipping individuals with the skills and capabilities they'll need to succeed, both now and in the future.



## Creating a great place to work



For us, 'Should've gone to Specsavers' is far more than just a slogan for customers. It's something we want every colleague to feel in their experience of working here, truly endorsing us as a great place to work. Through our positive people experience, we look to achieve this in everything that we do, every day. One of the ways in which we measure this is through our annual Great Place to Work® survey – the world's leading authority on workplace culture.

In 2024, we were named the eighth Best Workplace in Europe (up from 12th in 2023) – and 16th best in the world. The fact this was the first year we were eligible to take part makes the latter an even more exceptional achievement, of which we're incredibly proud.

We were also certified as an official Great Place to Work® in all 12 of our eligible countries – and were awarded multiple national accolades, too.

Our Danish business,  
**Louis Nielsen**,  
was crowned

### Denmark's Best Workplace

for the third consecutive year.



Our Northern European support office  
in Copenhagen also made Denmark's list,

**coming in at  
number five**

We were ranked the  
**sixth Best Workplace  
in Australia**

rising from our previous position  
at number eight



We were named  
**26th Best Workplace  
in the UK**

We were also  
named among the Best  
Workplaces in  
**Hong Kong**

We rose 14 places on the list  
**for Ireland,  
coming in at  
number 11**

**In Canada  
we placed  
at number 11**

a superb achievement in such  
a new market for us

We were awarded  
the third spot on the  
**Netherlands'**  
list

Norway ranked  
**number two**

In Finland, we came in at  
**number four**

In Sweden, we were named  
**number seven**



“Our inclusion on the Best Workplace lists means far more to us than just numbers – it’s a measure of the combined passion and continued hard work that makes Specsavers a place where everyone feels proud to belong.

**Pauline Best**

Chief People Officer

Across all regions – and including our ophthalmology business, Newmedica – 82% of colleagues responded positively that Specsavers is a great place to work. Our overall engagement score increased last year and there were some exceptional scores in the diversity, inclusion and wellbeing space, with 94% of participants responding positively on gender equity, and 86% of colleagues agreeing that people care about each other here.

Great Place to Work® is just one component of our always-on commitment to continuous listening. From town hall style events for hundreds of colleagues, to one-to-ones between individuals and managers, we’re committed to ensuring everyone can share their feedback and ideas in a multitude of ways, all year round.

Previous page: Partners and colleagues celebrating our success at the Best Workplaces™ Awards in the UK and the Netherlands.

Right: The Specsavers Ireland team strike a pose, after their huge rise in this year’s rankings.







## Nurturing our partnership

The strength of the Specsavers partnership – our 5,400+ optometry, audiology, ophthalmology and retail leaders, all supported by the provision of world-class support services – is synonymous with our success.

It's vital, therefore, that we continue to nurture our existing partners, while recognising and engaging those with the potential to join the partnership. Developing our support services and the continuous improvement of world-class retail knowledge and experience plays a hugely important part in supporting our partners across all regions. Our global development programmes, tailored in different markets to suit local requirements, ensure our partners are equipped to lead thriving, sustainable businesses and inspire their teams. Regional learning and development leads come together regularly to collaborate globally and align local plans to ensure we continue to advance the skills and strengths of our partners.

Our partnership development provides high-quality learning experiences based on key capability areas considered to be vital to sustained success within our unique partnership model. Our suite of development offers iterate all the time and are built with these capabilities and behaviours in mind.

Known in Australia and New Zealand as Partner Continuing Leadership Development (PCLD) – but pursued as a commitment in all regions – partners are encouraged to dedicate at least four days each year to personal leadership impact and development goals.

Specsavers Pathway, our in-house development programme, fuels our internal pipeline for partnership across every market. Hugely popular with aspiring partners, the scheme prepares both internal and external candidates for transition to business ownership through bespoke training and ongoing support.

Every year, this results in hundreds of graduates being ready for formal appointment into the partnership, either in their own region or, supported by our international recruitment team, across the globe. In the UK, for example, 292 candidates came forward for our partnership assessments, 155 of whom were approved for partnership and 122 moved to business ownership. Those approved and awaiting partnership continue to learn and grow through our ongoing development and support.

To enhance Pathway, we also provide a bespoke Partner in Development offering for candidates who require more specific support in leadership development.

Last year, partners in Canada benefited from practical workshops on helping to develop their stores into thriving community hubs, and exclusive webinars with external speakers on topics such as leading change and building resilience. We also launched a competency assessment tool to understand strengths and unlock potential.

Across Northern Europe, our partner development offer was refreshed, with new learning opportunities available around change management, team development and Power BI, as well as more scope to collaborate with other partners and exchange ideas and experiences.

UK and ROI partners connecting at our annual regional seminar.



In the UK, our partner development offer had a complete refresh and content was streamlined into three distinct areas: essential, practical and personal. A new team of Partner Development Leads was launched in every division, and we broadened our relationships with external thought leadership experts.

Connection, collaboration and consultation are fundamental components of the Specsavers partnership. Our regional seminars provide fantastic opportunities for partners to come together and hear first-hand about our future plans through engaging presentations and interactive exhibitions. These events are complemented by regular communications meetings, both in-person and online, to continually share insights, recognise achievements and look ahead to key initiatives.

However, two-way engagement is equally important as hearing about approved plans, so that partners can meaningfully contribute to decision-making, operational planning and strategic creation. In all regions, partner representatives are involved in forums, user groups, advisory



77%

of partners across the globe completed the ACE survey in 2024.

councils and local operating boards, ensuring they have a voice, and we collectively benefit from their frontline knowledge and experience. Some great examples of such collaboration include the launch of optical coherence tomography (OCT) in Denmark, Finland and Sweden, and a new retail system in the Netherlands and in our UK audiology business, where feedback from partners in the pilot groups was invaluable to the success of the implementation.

To gauge feedback, invite ideas and identify areas for improvement, all partners globally are invited to participate in our annual independent satisfaction survey, run by a global expert in the field of franchise and joint venture relationships. Where our Great Place to Work® survey measures colleague engagement – helping us to understand what our colleagues think about working here – our ACE partner survey measures the health of the very core of the business: our partnership. The ACE survey gives partners a chance to feed back on what they feel is working within our partnership, and what can be improved, to help strengthen our business relationship at Specsavers.

Our ACE survey results were hugely encouraging for the third consecutive year. With an average 2% increase in overall satisfaction compared to 2023, we ranked well above the global sector benchmark. We're particularly proud of our ACE Mindset Index score which, as a key indicator of sentiment measuring engagement, was 11% higher than the international standard.

## Supporting and developing our teams

As a global team, we have a wealth of unique knowledge, strengths and experience. Everyone brings a different perspective and valuable insight, and we embrace the diversity of thought that brings. We continue to embed our values and behaviours into the Specsavers culture; by being collaborative, curious, courageous, commercial, and compassionate in everything we do, ensuring we bring our purpose to life in the right way, and with the right spirit.

As we face into a changing world, we know the quality and breadth of new capabilities that we'll need to succeed in years to come will be more important than ever before, so we remain steadfastly committed to investing in our people.

Our goal is to help everyone be the best they can be, by supporting them to grow and stretch while developing new skills.



“Mixing both internal and external points of view and learning is really refreshing and so important, as well as having it easily accessible and all in one place.”

**A manager** on the Future Ready Manager pilot

Our Future Ready People priority, a key element of our Long-Term Framework, focuses on exactly this, aiming to attract and retain the best people, and continue to develop this talent to help us meet the needs of our business today, and in the future. Whether you're working in a clinical role in store, leading a team in our support offices, out on the road, or working in a specialist area of our supply chain – there is a plethora of impactful learning experiences available.

Globally, we grow our own talent in two ways: through talent development (helping our people improve in their current roles while building skills for the future) and talent acceleration (preparing our people to quickly step into higher, more senior roles).

To better equip our managers with the right knowledge and tools they need to manage their teams effectively, we launched Future Ready Manager across our global support offices and manufacturing and distribution sites. The new global online development hub is packed with videos, tools, and resources to help managers build brilliant habits and set them up for success. Divided into three key areas: Manage with impact, Inspire performance and Grow my team, it's the go-to place to build skills for future success.

Recognising how Artificial Intelligence (AI) is transforming the way we live our lives, we've evolved our global learning to help colleagues embrace the benefits of Copilot in Edge, one of our approved AI business tools. Divided into six episodes, the training is designed to help global support colleagues seize the many benefits AI can bring in terms of simplifying tasks.

We envision a future where AI and Generative AI tools are seamlessly integrated into daily operations, enhancing our operational capabilities, in support of our ambition to grow sustainably and change even more lives. Our dedicated team is finding many ways in which AI can help our colleagues save time, automate repetitive tasks and gather much wider insight. We're continuing with structured experimentation across targeted business areas that will allow us to learn quickly.



UK, Guernsey and Northern Europe colleagues celebrate the completion of one of our first talent accelerant programmes.

Nurturing an inclusive culture at Specsavers is very important to us and recognising that everyone has a role to play in this, we launched our first-ever global development activity focused on inclusion. We worked with industry experts to create powerful and emotive learning experiences to raise awareness of the importance of ensuring everyone feels safe and respected.

More than 1,500 colleagues across Supply Chain and our manufacturing and distribution sites completed a new Sustainability digital learning module and demonstrated their commitment to supporting our sustainability strategy. A key part of this development was to share a personal pledge around how they'll play their part (whether at work or at home) to drive our plans.

We ran Dignity at Work training for more than 29,000 managers and colleagues across our UK and Guernsey support offices and UK/ROI stores to help people recognise, report and respond to any possible instances of bullying and harassment.

Being mindful that development has evolved to be much more about grabbing opportunities to learn in the moment and when the time is right, we launched a new digital learning library, giving global support team colleagues access to more than 100,000 resources from the world's top digital learning providers.

Accelerating our talent is also a key focus for us. A year ago, we introduced new programmes across the UK, Guernsey and Northern Europe with a view to developing our leaders of the future. These opportunities are focused on fast-tracking the skills and capabilities of high-performing individuals and enabling colleagues to develop their careers at an accelerated pace. We had more than 330 applications, demonstrating a strong interest in talent development.

Through the support of external suppliers and our internal leaders, we're boosting their skills in areas such as change and transformation, strategic thinking, people leadership, and commercial mindset. Our ambition is to have talent accelerant opportunities at all levels across our global support team.

Growing our own talent from within is a fundamental part of how we work, not just for succession planning, but also to help realise the hopes and ambitions of our people by championing the right development and career paths. Key to this is our Talent Review process that takes place throughout the year in all regions and functions, helping us to shine a spotlight on the capabilities and aspirations of our people. This feeds into a global, board-level review to give an all-important organisational view of our pipeline of successors to support future needs.

# 10,000

courses in our new digital learning library have been completed by colleagues since launch.

Our senior leaders continue to invest in their personal growth, and we've seen strong participation and engagement in our in-house global leadership development offer. Last year, our essential learning focused on leading inclusively and embedding two of the expectations that sit behind our leadership model (Collaboration and Courageous). Having clear, globally-aligned areas of focus has created opportunities for leaders to learn with peers in other regions, leading to improved relationships, enhanced collaboration and ways of working.

We introduced a new People Forum of business leaders with the role of reviewing and inputting into our Global People Plan and helping shape future activity. For the first time, the People Forum is supported by the NextGen Forum – made up of members from our next generation of colleagues from across our support office functions in all regions. The two work in partnership to ensure different perspectives are heard.

Attracting and retaining the best talent is vital for us to deliver on our ambitions, and our global reward strategy plays a critical role here. In addition to benchmarking all roles twice a year to inform our salary review processes, we regularly evaluate and improve our total reward package to ensure it remains competitive and gives the right level of benefits and support. One example has been to enhance paid family leave for both primary and secondary carers in our UK/Guernsey support team and manufacturing and distribution (M&D) sites, and for secondary carers in our ANZ support team. Across our UK M&D sites, we also reviewed and enhanced our reward arrangements, launched enhanced sick pay and introduced long service awards.

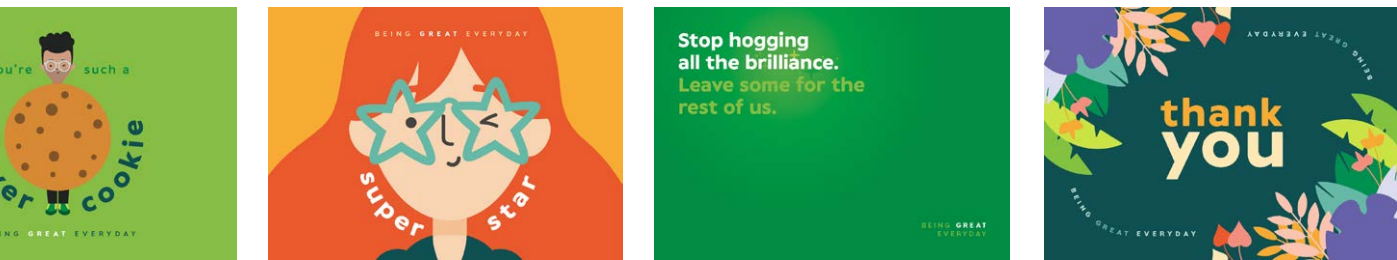
Providing an excellent candidate experience is critical to our long-term success, and to support this we launched new careers sites in the UK, Republic of Ireland and Canada last year. The dedicated platforms help us better engage with prospective colleagues, share role vacancies and shout about life at Specsavers. These are the first steps in a global rollout, with new sites launching in our other regions throughout 2025.

Last year, we introduced a Remuneration Committee (RemCo) to our corporate governance structure. Chaired by our Chief People Officer, this ensures consistent processes and decision-making regarding our global reward strategy as well as advising on reward practice within Specsavers to ensure we have the talent we need to achieve our goals.

We value everyone who chooses to be a part of Specsavers and are proud to have so many long-serving colleagues. In 2025, almost 200 support office colleagues globally celebrated being part of the Specsavers family for 20 or more years and a further 900 of our partners in the UK alone marked this milestone.



In Australia we were named in the Great Place to Work® Best Workplaces for Women 2025, which recognised our leadership progression model that ensures women in mid-level roles receive structured career development to enable them to move to senior leadership.



A selection of Being Great Everyday postcards that colleagues have enjoyed sharing.

We recently enhanced our global long service awards to recognise the first year with us and then increments of five years in a way that is meaningful to the person celebrating.

And in response to colleague feedback through the Great Place to Work® survey, we launched a new global peer-to-peer recognition framework (Being Great Everyday). It helps managers and colleagues show their thanks and appreciation for others in a variety of ways, using printed or virtual postcards, messages and online community posts.

Making sure our store teams are skilled experts in all aspects of our offer and service is critical, so they can continue to deliver the highest standards of care to our customers. Continuous improvement interventions cover everything from clinical support to product knowledge, and our network of regional trainers and in-store trainers do a brilliant job inspiring and engaging colleagues in new topics and materials.

In Northern Europe, we enhanced and aligned our development offer for optometrists and sales assistants where we now see an average of 250 people participating in our online training, every day.

In Canada alone, our team of regional training managers delivered 270 days of in-person support for new store openings and store colleagues completed more than 450 hours of learning with the Specsavers Academy in its first year.

We launched a number of new Career Pathways – Retail Optical Assistant, Audiology Basics, and Domiciliary – that have so far helped enhance the foundational capabilities of more than 14,000 UK and Republic of Ireland store colleagues.

In Australia and New Zealand, we bolstered our existing training by offering self-led leadership development for non-leadership roles, a customer service programme and virtual reality learning. Our online system, iLearn, logged the completion of more than 720,000 modules by store colleagues across the region last year.

## Professional development

By prioritising and investing in continuous clinical education, we ensure our teams are equipped with the latest knowledge and skills, ready to provide the highest standards of expertise and care for our customers.

In 2024, we celebrated 30 years of our Professional Advancement Conference (PAC) in the UK, with more than 2,000 colleagues and partners attending. Joined by almost 50 industry stakeholders, including suppliers, professional bodies, learning institutions and charities, delegates engaged in dynamic workshops, peer reviews, and practical sessions. Topics ranged from presbyopia and glaucoma management to future directions in eyecare (including AI). Our hybrid MiniPAC events across the UK and Republic of Ireland were equally successful, combining in-person and online sessions to deliver thousands of continuing professional development (CPD) points to registered professionals. To date, we've created more than 300 accredited learning pieces, providing more than 100,000 CPD points to Specsavers' registrants.

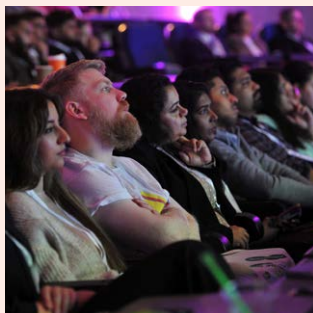
Now in its 13th year, our ANZ Clinical Conference welcomed almost 1,000 optometrists in person and online. An impressive line-up of esteemed speakers and industry experts provided in-depth insights into the latest updates in optometric practice, discussing topics ranging from disease diagnosis and patient communication to collaborative care. The main conference exhibition also enabled engagement with key suppliers and patient support bodies. In addition, we held a series of dispensing conferences with a focus on dispensing progressive lenses to further enhance the expertise of our store teams.

More than 2,000 delegates participated (in person and online) in the six Clinical Conferences we hosted across Northern Europe, one of which was dedicated to audiology in the Netherlands. We invited industry experts to talk about the knowledge and skills clinicians need to deliver excellent clinical care. The conferences contribute to both internal and external colleagues' professional development, making sure the whole industry is equipped to care for customers. In Sweden and Finland, we also hosted events to provide opportunities to network with speakers or Specsavers colleagues while connecting with fellow students, which helped boost enrolments.

Last year in Canada, we kicked off our professional development offer with an Ask the Expert webinar series. In the opening session, we welcomed a renowned local retina specialist who provided an in-depth review of retinal diseases and optical coherence tomography interpretation. They shared invaluable tips and detailed analyses of real-life cases from our clinics, making the session highly practical and engaging for our optometrists.

Optical and audiology practitioners attending our clinical events and conferences.

Bottom: ©FRANCESCO VICENZI, Organic Photo.







Prioritising continuous clinical education means our teams are well equipped to deliver the highest standards of customer care.

Bottom left: ©FRANCESCO VICENZI, Organic Photo.

Expertise among our store team members continued to grow, with more than 12,000 UK/ROI colleagues completing Optical Assistant Level 1 and almost 11,000 colleagues completing Optical Assistant Level 2. Our innovative Level 3 BTEC Certificate has seen more than 2,500 colleagues enrolled since its relaunch in 2023. We've seen a huge increase in the number of Cert 3 qualified colleagues enrolling on Cert 4, with one in three continuing on the dispensing career pathway.

And our Cert 4 Plus option, which allows rising stars to achieve a Level 4 BTEC qualification in just over nine months, has gone from strength to strength. The Pre-Reg Academy continues to support pre-registration optometrists working through the Scheme for Registration and, with courses running every week all over the UK, we continue to have more than 1,000 graduate attendees.

Our Trusted Experts Series for optometrists and dispensers across Australia and New Zealand included a variety of workshops, masterclasses, e-modules, and webinars focused on recommending lifestyle-enhancing products to help care for our customers and ensure they have a memorable experience with us. Enrolments for the Certificate IV in Optical Dispensing increased in ANZ, reflecting the ongoing demand for vocational education and training and course completion increased by 12% from 2023.

We've strengthened our partnerships with universities across Australia and New Zealand to promote optometry and support our future talent pipeline. Nearly 500 clinical placements were hosted across our ANZ store network, and 52% of final-year students from our eight affiliated optometry schools chose Specsavers as their graduate employer.

By welcoming almost 250 graduate optometrists onto our two-year programme, we continue to solidify our position as graduate employer of choice. Graduate retention remained over 90% as we supported more than 450 graduates through core events of the programme last year; ensuring everyone had the best possible experience and professional development in their first two years in clinical practice.

# 3,500

optometrists and dispensers across Australia and New Zealand engaged with our Trusted Experts Series, now in its fourth year.

In Sweden, where we've collaborated with the Karolinska Institutet for many years, our relationship further strengthened last year in line with the rollout of optical coherence tomography as part of our eye exams. Teachers from the institute made a major contribution to the development, quality assurance and implementation of the extensive training material.

## Focusing on diversity and inclusion

We're committed to having an inclusive culture that ensures everyone feels welcome, valued and proud to belong at Specsavers.

Our global diversity and inclusion (D&I) plan continues to evolve, supported by a variety of colleague network groups and D&I forums across all our regions.

We have D&I Leads in each region, responsible for initiating global and local activity, who continue to help us to deliver against our three D&I priorities:

**Deliver our Respect and Inclusion development offer across our stores, support offices, M&D sites and Newmedica team.**

**Gather demographic data to ensure our plans are fully representative of those who work with us.**

**Implement gender balance resourcing activity for all senior roles across our support offices, where we continue to introduce gender balance shortlists and panels, alongside using gender neutral language in our recruitment adverts.**

In support of these priorities, we focused on inclusion by holding panels and welcoming external experts for events including International Women's Day, International Men's Day, World Day for Cultural Diversity and Pride Month. Last year, we shone a spotlight on allyship, providing hints and tips on how we can elevate others and give people space to share their thoughts.

We shared a global gender pay report for our support offices and published statutory reports in line with regional legislation requirements, and we've seen many positive improvements in the data. Our gender balance activity across our regions should help us sustain these improvements into the future.

We worked to embed our global talent principles and guidelines that we introduced in 2023 to ensure fairness and transparency in support of gender balance as well as our overall diversity and inclusion activity.





## Caring about wellbeing

We continue to encourage everyone at Specsavers to proactively look after their wellbeing while ensuring it's simple and easy to seek support as needed.


Results from our 2024 Great Place to Work® surveys show a wellbeing index score across all regions and populations of 77%, highlighting that our people feel Specsavers presents a positive environment where they're supported to be at their best.

We've focused our wellbeing offer in all regions around four key pillars: emotional, financial, physical and social health. We regularly provide targeted support, guidance and tools for each area.

During 2024, we invited external guest speakers to share their expertise on topics ranging from sleep to managing stress and anxiety. The series of live events and follow-up recordings were hugely successful.

We also motivate our leaders to champion wellbeing with their teams. On International Self-Care Day, our Chief Financial and Commercial Officer shared his own experiences and highlighted the importance nurturing wellbeing.

We renewed our partnership with Headspace, enabling colleagues globally to access a free subscription to the mindfulness and meditation app. With more than 10,000 of our people signed up and 15 million minutes of Headspace used, the app continues to be a popular and helpful resource. Colleagues also now have five complimentary licences for their friends and family members to help even more people benefit from this valuable support.



“If you take care of yourself and look after your own wellbeing, whether it be physical, mental or emotional, you'll then be able to look after those you love and those around you in a far better way.”

**Paul Fussey**

Chief Financial and Commercial Officer

# Our customers

## Transforming the experience to be loved by every customer

Our ongoing, unrelenting focus on delivering exceptional value and clinical expertise for customers is one of our fundamental principles. Last year, we were privileged to change lives through better sight and hearing for more people than ever before.

Through continually investing in market-leading equipment and expertise, designing world-class stores, products and services, and raising vital awareness of life-changing health challenges, we've made significant strides in what we offer our customers, while exploring the skills, capabilities and technologies we need to build on our success long into the future.



## Enhancing our offer

Customers are increasingly looking for simple, convenient, and personalised ways to experience our services, both in-store and online, and it's important for us to offer a flexible approach to meet their ever-changing expectations.

Keeping expert care at the heart of customer interactions, we're transforming our capabilities to enable what we believe will be a truly blended experience. This will empower our customers to fulfil their needs in a way that makes sense for them – whether that's being able to see all of their appointments, prescriptions, products and orders all in one place; having the option to self-serve, with more appointment possibilities tailored to their needs; completing their basket online from what they've started in store; and having more payment methods and 'buy it again' services. However they wish to interact with us, we'll make it possible.

We'll also be enabling our increasingly busy stores and colleagues to more efficiently and effectively help customers. We'll be streamlining the processes and tools they use, giving them access to all customer information in one place, saving time and administration; providing automatic recommendations so our clinicians can tailor the customer experience; and monitoring customer flow, allowing early intervention to maintain higher levels of customer satisfaction.

Over the past year, we've spent time understanding our customer and colleague journeys; what works well – both now and into the future – and where we have opportunities to enhance them. From this, we've been able to identify how the blended experience will look and feel, and over the next year, we'll start putting the foundations in place for us to start implementing these opportunities.

Covering our optics and audiology businesses, this transformation will be worldwide, and our focus is on making sure there is a global standard for the customer and colleague journey, while allowing for regional nuances.

We continued to invest in, and work with providers to help innovate, our range of clinical services, all aimed at supporting our clinicians to provide world-leading care.

We improved our clinical efficiency and access to care for our customers across the UK and Republic of Ireland, seeing an additional 243,000 patients for eye examinations year on year. And we provided Enhanced Optical Services (EOS) to more than 1.4 million people in the last year – an increase of 152,000 people being looked after in the community, providing a much-needed reduction in pressure on GPs and secondary care.

**24  
million**  
customers were served during  
the last 12 months either online,  
in-store or at home.

Our Enhanced Optical Services are offered outside of standard eye examinations, allowing our clinicians to undertake additional or repeat tests to understand more about a patient's eye health, monitor stable conditions (such as glaucoma) in the community, and act as the first port of call for minor and acute eye conditions.

Our commitment to supporting world-class optometry skills has also continued, with more than 1,000 optometrists achieving Wales Optometry Postgraduate Education Centre (WOPEC) accreditations this year, along with almost 280 enrolling on to Professional Certificates, and over 100 enrolling on Independent Prescribing courses. These qualifications equip the optometrist community with critical skills to care for even more EOS patients.

In audiology, we've continued to increase the number of clinicians to meet rising demand and further boost our clinical capacity – with almost 300 completing clinical training qualifications in the last year and a further 500 progressing through training in 2025. This commitment has also seen an expansion of our university placement programme, delivering vital experience for those pursuing a degree in Audiology.

In Northern Europe, the national rollouts of optical coherence tomography (OCT) cameras to all stores were completed in Denmark, Sweden and Finland, meaning that all Nordic customers now have access to advanced eye health screening. Almost 1,000 optometrists across these countries participated in a training programme in preparation for the rollout. The intensive course combined digital modules, webinars, and classroom training delivered by internal and external experts.

As part of our continued commitment to improving access to quality, patient-centred care, we recently invested in the Norwegian Eye Health Clinic (NEC). Our initial focus for this partnership is on improving the cataract, dry eye, and general ophthalmology services that we can offer in our stores, in collaboration with their team of expert eye doctors. This will enable us to help more people, and provide an even better service, across the communities we serve.

And in Australia, we've successfully piloted advanced dry eye technology. We've been testing using Low-Level-Light Treatment and Intense-Pulse-Light treatment as a new service for patients experiencing dry eye symptoms. In addition, our optometrists have reported great professional satisfaction in being able to provide effective and long-term solutions. The technology will become available across our Australia and New Zealand clinics to support even more patients.



of patients using our advanced dry eye technology reported significant improvements in symptoms after completing a full course of this highly effective and affordable treatment.

## Reaching more customers

Our marketing initiatives continue to innovate, with new campaigns and tools to ensure we create effective messaging, excitement and engagement. Our well-known *Should've Gone to Specsavers* tagline, remains hugely popular and we're continually exploring how we can bring it to new audiences across various platforms.

In Northern Europe, we invested heavily in attracting new customers, with a focus on quality and expertise; including campaigns showcasing our Owned and Run structure. This highlights how proud we are of our partnership model and helps bring to life what really sets us apart from the competition: explaining to customers that when they visit one of our stores, they aren't just stepping foot inside a 'generic Specsavers' but are entering a local business owned and run by professional experts, ready to serve their local community.

We also launched our first-ever multi category national offer for audiology in the Netherlands, providing free hearing aids and varifocals. Our Stop Fade Out initiative continued to help people talk about issues that can be faced by those living with hearing loss, such as social stigma and isolation, highlighting the importance of visiting a Specsavers audiologist for support.

We experienced exceptional growth in our newest market, Canada, building on our journey since opening our first store in 2021. Last year, we opened stores in Manitoba – taking us up to 150 businesses across four provinces, increasing eye examinations by 55% year-on-year, and firmly establishing Specsavers as a trusted name in Canadian eyecare. During 2025, we plan on reaching more than one million Canadians for their eyecare and eyewear needs.

We've also strengthened our position as the number one choice in the communities we serve by continuing to offer advanced clinical technology, including OCT, to our patients; helping with the early detection of conditions like glaucoma and diabetic retinopathy.

Our continued investment in our products, services, equipment and expertise means we can help change the lives of more and more customers.







Astronaut Colonel Chris Hadfield features in an innovative eyecare campaign in Canada.

We showcased this service in a playful and engaging way through an innovative campaign featuring Canadian astronaut Colonel Chris Hadfield contributing to a remarkable 80% brand awareness, underscoring the value Canadians place on accessible, high-quality eyecare.

In Northern Europe, we were proud to bring best-ever offers to our markets, providing exceptional value to customers and boosting our presence in an ever-more challenging trading environment. This ensured our price points remain very competitive in each country, enabling us to defend our price perception and go bigger on offers.

Teleoptometry – where sight tests are carried out remotely, enhancing accessibility of high standards of care for our customers – also continues to be an exciting area of expansion, particularly in Northern Europe. And our business was the subject of a prominent, peer-reviewed research paper, this time demonstrating how our Danish teleophthalmology setup can offer cost-savings and quality-of-life benefits to the healthcare sector.

We're also using teleoptometry in other regions, including the UK and Australia, as well as our newest market Canada where we carried out more than 3,000 tests via this method across stores in British Columbia. Our Woodgrove, Nanaimo store delivered more than 75% of these, thanks to the dedicated support of a full-time teleoptometrist.

Our Australia and New Zealand stores have been busier than ever. Improved customer communications, through multi-channel recall, new recall intervals, and an enhanced booking system, made it even easier for our customers to interact with us.

To date, 85% of our ANZ stores have engaged with the Trusted Expert series, demonstrating how tailoring test room language and approach can build better trust between eyecare professionals and customers, and deliver improved health outcomes. And our optometrists have set a new standard of a 92% success rate in detecting causes of preventable blindness, resulting in sight-saving interventions for more than 130,000 patients each year.

Our ongoing support of KeepSight, Australia's solution to prevent diabetes-related sight loss through regular eye tests and early treatment, has also seen active participants on the KeepSight patient database increase to more than 500,000. This enables approximately one-third of all people with diagnosed diabetes in the country to receive clear reminders from Diabetes Australia when their eye tests are due, if they don't return following a recall message from Specsavers.

# 40,000

teleoptometry tests  
were conducted in the  
Netherlands last year.



A patient ready for theatre at our our Newmedica Eye Health Clinic and Surgical Centre in Northampton, UK.

## Investing in ophthalmology

Last year, our Newmedica business delivered more than 325,000 NHS and private appointments supporting almost 120,000 patients. We also opened five new partnerships, as well as eight 'spoke' outpatient clinic locations, helping even more patients gain access to the highest standards of clinical care, ranging from glaucoma services and cataract surgeries to medical retina and age-related macular degeneration treatments.

We're hugely proud of the outstanding patient outcomes achieved by our teams, with 99.7% of cataract patient care completed without complication of posterior capsular rupture (PCR).

We're passionate about investing in the future of the ophthalmology sector. We've been offering training placements for resident doctors since 2021, with almost 70 placements across 14 services during that time. Our Newmedica clinical supervisors also supported placements for more than 20 doctors in training, and work with integrated care boards (ICBs) or NHS deaneries to identify further candidates. We ran almost 100 continuing professional development (CPD) events for community optometrists and dispensing opticians - and offered pre-registration support to 130 optometrists, through the observation of outpatient clinics and examining patients who presented with various pathologies. We also hosted several independent prescribing placements for the first time, with plans to increase this to 50 by 2026.

Newmedica plays an important role in our total care proposition in the UK, ensuring communities have improved access to specialist eye health services, enabling them to choose high quality care on the NHS without the long wait or choose more tailored private care, without the high cost.



## Excellence in customer service

Better understanding customer sentiment is hugely important to us as we continue to invest in reaching more people and changing even more lives. Our global customer experience platform, coupled with in-depth AI analysis, continues to support us and, through email and SMS surveys as well as listening to feedback through external review sites, we're collecting more data than ever before. By using this insight to focus closely on the needs of our customers, we've continued to see our Net Promoter Score increase across all markets.

In the UK and Republic of Ireland, we achieved our best Customer Satisfaction Index (CSI) score for 10 years. We climbed the Institute of Customer Service rankings by 32 places in the UK, coming in at number 30 nationwide – and in the latest CXi Customer Experience report in Ireland, achieved a fantastic sixth place. Plus, 17,000 colleagues, representing more than 900 of our UK and Irish businesses, qualified for our internal customer service awards scheme – the Customer Champions League – in recognition of their exceptional commitment to delivering the highest-quality service to their customers.

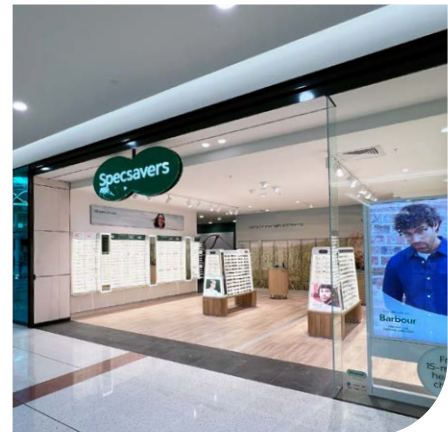
In Northern Europe, we received a 'Best Optical Chain in Norway' award voted for by our customers, and a CX Elite award for 'Best Customer Culture'. We also made appearances on the shortlists of two international awards for 'Best Customer Service' and 'Best Customer Experience Strategy'.

In 2024, for the fifth consecutive year, we were voted the most trusted brand for eye health by Australians and New Zealanders, with Specsavers Audiology further recognised in the Hearing Services category. We were also ranked among the top five in KPMG's annual Customer Experience Excellence report, for the second year in a row.

“The store's attention to detail, especially in the examination, was exceptional. It was more thorough than I had with my very expensive previous optometrist, and I received answers to questions I've had for over a year.

**Specsavers Upper Canada Mall customer**





Our Randers, Denmark and Redbank Plaza, Australia stores showcasing the latest in store design.

## Designing world-class stores

Ever-growing customer numbers and evolving retail and competitor landscapes mean we continually invest in our stores to provide the very best environment and experience for our customers, partners and colleagues. Last year, we invested £150 million in store enhancement activity across our portfolio.

We completed a record-breaking 600+ optics projects and 40 audiology growth initiatives across the UK alone, underscoring our continued commitment to strategic expansion and innovation. These spanned new store openings, relocations and enhancements, along with various smaller-scale projects to improve and modernise our customer experience and operational efficiency while maximising our capacity to operate in an environmentally sustainable way.

In addition, we invested in 130 projects across Northern Europe including rebrands and expanded facilities. Thanks to the launch of seven new stores across Australia and New Zealand, 10,000 additional sight tests were facilitated in the region last year, more than 160 refits kitted out our locations with the latest visual technology, including digital screens and illuminated frame displays. Our newest market, Canada, saw another remarkable year, with 40 new stores adding almost 100 test rooms to our national estate.



## Focus on frames

It was another exciting and successful year for frame development, as we sold almost 25 million glasses worldwide; an increase of more than 500,000 on the previous 12 months. We introduced a host of new products, brand launches and range refreshes, continuing to offer unrivalled customer choice and value to suit individual styles and budgets.

Barbour kicked off the global launch calendar, with a stylish unisex collection of glasses and sunglasses. Inspired by the brand's modern countryside aesthetic, the range offers a fresh twist on classic shapes, featuring timeless colours and patterns perfect for both city life and the tranquillity of the country. By the end of 2024, the range attracted a 31% new customer mix in the UK alone.

Building on the success of the Vivienne Westwood launch in 2022, we expanded this offering into a global men's collection, with 12 new frames. These blend the iconic British designer's signature style with modern functionality, featuring sleek designs like glossy black acetate, chunky silhouettes and tartan interiors, perfect for making a bold statement.



We also introduced Florence by Mills in all markets, with 12 optical frames to attract a younger demographic and appealed to Millie Bobby Brown's strong social media following. The playful mix of pastel crystal acetates and metal styles, with flattering shapes and on-trend colour tones, were a huge hit with the 25 – 34-year-old age group, driving a strong take up.

“In 2024, we knew we needed to get the balance of appeal and relevance right for all our customers. We introduced brands and styles to appeal to our core demographic, whilst managing to attract younger consumers. With the introduction of younger styles in our Specsavers range and the launch of Florence by Mills, we're certainly heading in the right direction.

**Matt Stewart**

Global Frames Development Director

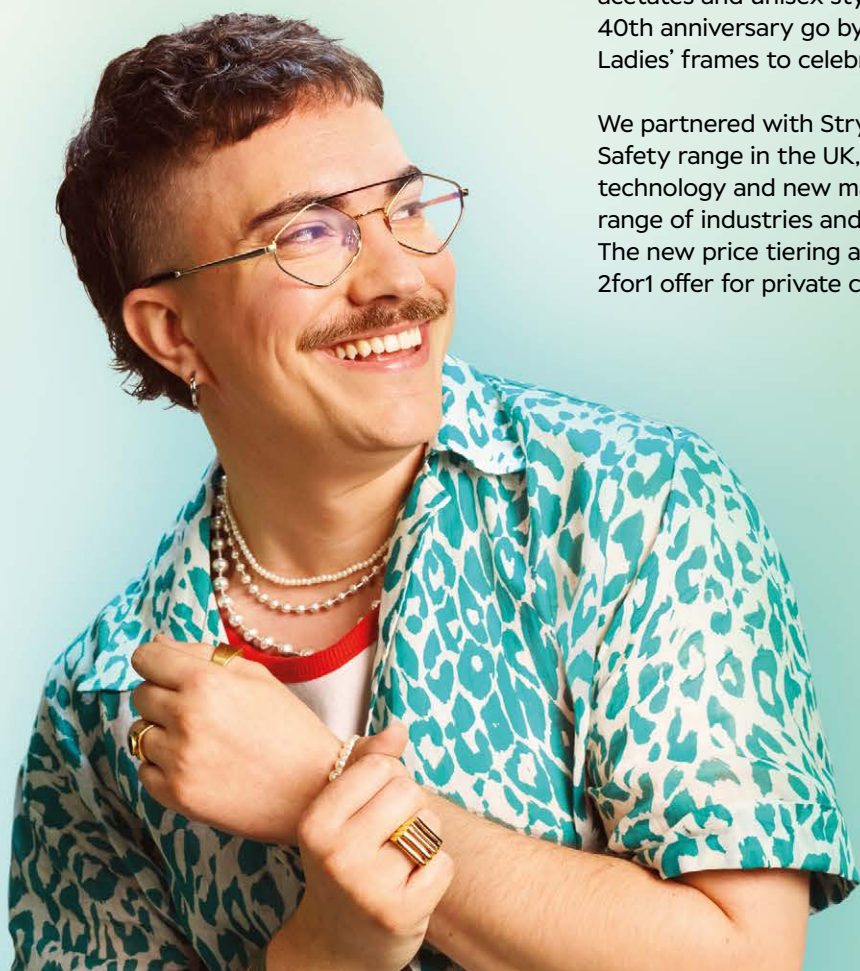


We were incredibly proud to launch our Elton John Eyewear range globally, developed in collaboration with Elton John Eyewear and Rocket Entertainment. Our exclusive collection features 13 beautiful optical frame designs and two limited edition sunglasses, all named by Elton John after either an iconic song, personal milestone, or pivotal period in the star's life.

In our Specsavers Men's and Ladies' ranges, we launched two refreshes in our key £90 price point. Both collections had a huge injection of on-trend product across the year, featuring colourful acetates and unisex styling. And of course, we couldn't let our 40th anniversary go by without a mention, so we launched two Ladies' frames to celebrate.

We partnered with Stryder Eyewear to relaunch our Specsavers Safety range in the UK, Northern Europe and ANZ, with patented technology and new materials enabling us to cover a wider range of industries and PPE requirements than ever before. The new price tiering also enables Safety to be included in our 2for1 offer for private customers for the first time.

Our exclusive Elton John Eyewear range features 13 beautiful designs.





**Our annual review 2024 - 2025**  
Our customers



Our AndMore range in Northern Europe brings the latest in frame fashion to our customers.

We continued to focus on regional ranges, with Hayley Elsaesser, a Canadian fashion designer known for her bold, colourful designs, partnering with us for our first local brand collaboration in Canada. The new offering consists of bright crystal acetates, chunky silhouettes, and of course Hayley's iconic prints - with 12 optical frames and six sunglasses.

In its second year, AndMore in Northern Europe continues to rapidly bring the latest trends to our customers, with new limited-edition styles landing every six months. And in Australia and New Zealand, we saw strong refreshes of all five iconic brands, including Mimco and Alex Perry, taking place in close collaboration with the designers.

In our children's range, we work with industry specialists to further improve our offer, ensuring we have the best-fitting products in the most exciting styles, in line with our new fit-for-purpose principles. This included two new ranges - SuperFit, a set of six styles ergonomically designed for comfort, with adjustable temples for improved length to bend, rubber temple tips for extra grip, and improved nose bridge fit. And Inflex, a collection of 10 flexible, robust frames in strong colourways and neutral tones - suitable for babies (from six months) up to children aged eight.



Throughout the new product development process, we remain committed to reducing our environmental impact by working with suppliers to use more sustainable materials and manufacturing processes to develop and produce our Specsavers frame range.

We tailored a global merchandising solution - Ease of Shop - to suit customer needs and preferences. Our new merchandising principles make it easier than ever for customers to find frame styles and shapes they love by streamlining their selection journey. Dedicated Ease of Shop training equips our store colleagues with the knowledge and confidence to provide expert frame recommendations.

# Progress in lenses

Last year, we were proud to make a number of significant advancements in our ophthalmic lens offerings, reflecting our ongoing commitment to providing cutting-edge solutions for our customers.

We upgraded our Varifocal Safety Lens range for our customers in the UK and Northern Europe, aligning product options and enhancing visual performance for safety wearers.

We launched SuperBoost in the UK. This innovative lens provides superior clarity compared to standard lenses, ensuring a sharper, more comfortable visual experience for single-vision and pre-presbyope customers.

We expanded our clear MiYOSMART prescription range, allowing more wearers to benefit from advanced myopia management technology. Designed specifically for children, we introduced MiYOSMART Sunbird and Chameleon ophthalmic lenses which offer specialised photochromic and polarising solutions, adapting to changing light conditions to help protect young eyes.

Across the MiYOSMART family of lenses, we increased sales by an exceptional 64% year-on-year. We also increased sales of both our photochromic and polarised lenses, with a combined total of 71 million reflecting a 4% rise – and saw a 4.5% boost for occupational lenses, with 1.2 million sold.

In the world of contact lenses, we successfully launched high-performance daily disposable silicone hydrogel lenses into our European stores, from global vision care leader Hoya.

Easyvision elision and elision multifocal were also added to our core portfolio, bringing high-level comfort and performance comparable to established contact lens brands. The Hoya products are suitable for a wide range of demographics, and our multifocal lens allows customers requiring both distance and reading prescriptions to continue wearing the lenses.

We provided more than 10,000 children in the UK with CooperVision MiSight contact lenses. These are specifically designed for myopia control and approved to slow the progression of myopia in children from eight years of age.





## Advancements in audiology

The success of our audiology business continues with some amazing milestones and achievements realised over the past 12 months. We now have 650 audiology businesses across the UK, Republic of Ireland, Netherlands, Australia, and New Zealand, with most of our stores in these countries offering audiology services.

Last year we sold more than 746,000 hearing aids globally, opened 22 new audiology businesses in the UK alone, and expanded hearing care services to even more of our domiciliary partnerships.

Technology continues to be a key focus, both in terms of the audiology services and products we offer. We rolled out Auditdata across all our UK stores – a new practice management software, benefitting customers and colleagues alike. To support the launch, more than 13,000 team members across audiology and optics completed dedicated training, to ensure our customers receive the best possible care. The global upgrade programme continues throughout 2025, to bring every region offering audiology onto the latest version, making the most up-to-date technology and functionality available to all.

# 3.5 million

people in Australia have had their hearing screened since we launched in the region, and a further 500,000 in New Zealand – helping to reduce avoidable hearing loss across urban and rural communities alike.

We launched hearing devices with a dedicated deep neural network AI chip, from one of our core suppliers, Sonova. For those with hearing loss, social environments are often challenging, and most of our customers are seeking support to hear in crowded places. Trained to separate speech from noise, these devices provide excellent speech clarity, even in noisy environments, and allow wearers to hear speech from all directions. Offering the lowest price on the high street, we made this technology more accessible and have now fitted more than 2,500 customers with AI devices.

We also introduced GN Resound to our supplier portfolio – a global leader in intelligent audio solutions, specialising in hearing aids, as well as audio, video, and gaming technology. In our first year of partnership, we supplied more than 100,000 GN hearing aids, delivering cutting-edge technology and exceptional value to our customers.

In the Netherlands, we established our relationship with the digital care platform Earhelp, as the first national chain to work directly with ENT doctors, reducing waiting times for our customers. And we're proud to have continued our work as a founding member of the Stop Fade Out initiative, which focuses on the mental health impact of hearing loss. On World Hearing Day 2025, this became an official foundation – and has now been nominated for a SABRE international PR award in the 'Best Benelux Campaign' category. Our overall awards success also continued with a prestigious 'Best Audiology Retailer' award (for the sixth time), as voted for by customers.

We also launched tele-audiology services across our Dutch business, bringing clinical cover to even more locations and reaching customers in both remote and resource-stretched communities.

Last year, we celebrated our 300th Australian store to offer audiology services, and the fifth anniversary of our first audiology offering in New Zealand.



Australia continued its ongoing double-digit growth, with orders up 16% year-on-year – and in New Zealand, we launched NZ\$0 out-of-pocket hearing aids for customers eligible for a government funding contribution. This has helped improve accessibility to the highest standard of care, giving many New Zealanders who may not have previously been able to afford hearing devices a great option.

Service measures in the region remain strong, with net promoter scores of customers fitted with hearing aids measuring at 88.01 in Australia and 85.73 in New Zealand. In both countries, we were also delighted to win the Readers' Digest 'Quality Service' award in the Audiology category, as voted for by consumers.



In the UK and Republic of Ireland, we published 'It's Time to Talk About Hearing' – reports designed to raise awareness of the importance of hearing health and improve access to care for patients with hearing loss. Bringing together evidence, statistics, case studies and personal stories, they highlighted the impact of hearing loss on people's lives, and how technology and aftercare can help – with the UK launch hosted by Yasmin Qureshi MP, who has hearing loss herself. The reports were also a key discussion topic at The British Society of Hearing Aid Audiologists roadshows, prompting professionals to discuss the future of hearing care.

We also attended the Labour and Conservative party conferences in the UK for the second time, where we carried out ear (and eye) health checks for around 950 delegates and spoke directly and in-depth to more than 100 ministers, peers and commissioners. Together with the wider sector, we also urged the government to improve access to eye and hearing care for people who face barriers, such as those experiencing homelessness. This culminated in an event at Westminster, attended by 100 guests including sector leaders, MPs and peers.

The Westminster, Holyrood and Stormont launches of 'It's Time to Talk About Hearing' brought together sector leaders, parliamentarians, our clinical experts and people with hearing loss.



To help us improve even more lives, we believe we have a responsibility to help shift the perception and stigma around hearing loss. So, we've made big changes around how we talk about our audiology services, to help people understand how hearing loss can affect all generations. Our successful partnership with 80s music legend Rick Astley, which saw us re-record the iconic hit Never Gonna Give You Up with misheard lyrics, was one of the world's most-awarded PR and social campaigns in 2024, notably scooping up five prestigious global Cannes Lions Awards. Most recently, our work in the UK with singer Lulu and broadcaster Gyles Brandreth built on this national conversation, helping more people feel comfortable about having their hearing checked. These campaigns had a combined reach of over 70 million people – and independent research showed that they reduced the stigma associated with hearing loss by 6%.







## Enhancements across our supply chain

Our customers have higher expectations than ever before in terms of the experiences we deliver, and our supply chain plays a critical enabling role through investing in our existing facilities and services, further developing fulfilment capabilities and protecting our competitive advantage.

Our supply chain sites employ almost 2,000 colleagues globally, with many more through our long-standing strategic partners in Asia. At the largest site - Hungary's Szatmar Optika, which supports our Northern Europe, Republic of Ireland and UK markets - the 650-strong team produces around 300,000 glazed orders each month.

To support the continued evolution of the technology that drives these processes, we successfully trialled a new machine from one of our equipment providers, MEI. This single machine, measuring just 2m<sup>2</sup>, can combine seven process steps by securing semi-finished lenses using a vacuum instead of the traditional mechanical block. This technology unlocks the opportunity to double output from the existing floor space in our current facilities, with significant reductions in labour, energy, consumables and waste. And with no water or alloy needed, it's much kinder on the environment too.

We advanced our capability in warehousing and distribution automation in the UK, with the introduction of automated packing solutions, initially at our Lens Online site - consolidating manual dispatch processes across three UK locations.

As part of a comprehensive network investment review, we expanded capacity at Vision Labs - our lens manufacturing site in Kidderminster, UK and invested in the relocation of Canada Glazing Services into our British Columbia Distribution Centre. This enabled service and quality improvements on manufactured products, while also providing a great place to work for our colleagues. We also established a lens mass manufacturing facility in The Philippines to produce and service high-index finished and semi-finished lenses to our supply chain network of distribution centres and prescription lens manufacturing facilities.

# 55 million

lenses are supplied through our manufacturing and distribution centre and nearly 15 million glazed orders to our customers worldwide every year.

# Sustainably making a difference

Our strategy is to ensure sustainable long-term growth while supporting the **people** we work with, mitigating our impact on the **planet** and maximising our social contribution within the **communities** we serve.

Volunteers from our Norway stores travelled to Zanzibar to support our Give Sight in Tanzania project.



We're passionate about creating a place where everyone feels included, cared for and proud to belong with a focus on diversity and inclusion, health and wellbeing, as well as personal development. (See our people chapter for more details).

We're committed to reducing our carbon emissions, aligned to science-based targets, with an aim to reach net zero across our business by 2050 at the latest. We're also minimising material usage and building resilience against climate change.

We believe healthcare is a basic human right, not a privilege, which is why we're always working to make quality, affordable eyecare and hearing care accessible to everyone and supporting those who may face barriers to access. We're dedicated to making a positive impact by being integrated in local communities, while creating social value through leveraging our industry influence, geographical presence, skills and resources.

At the same time as directly supporting our commitments, we recognise the key role we play in generating tax revenues in each country in which we operate. In the fiscal year ending 28 February 2025, Specsavers globally, its businesses and its partners paid £379m in various taxes directly attributable to them. In total, £965m of taxes were generated and collected for the governments of the countries in which those businesses operated. Full details of our tax strategy are available on our website.



## Supporting our local communities

### Our position

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A huge part of our heritage lies in our unique partnership model. Our stores are owned and locally run by opticians, audiologists and retail experts, meaning they're uniquely dedicated to the communities they serve.

We've always been passionate about helping those who might not otherwise be able to access sight and hearing care services and we believe we can play an even bigger, more responsible role in society. We're committed to continually providing broader access, increasing awareness of prevention and early detection support.

## Our plans

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### We will continue to:

**Support with our skills:** Use our clinical expertise within optometry and audiology to support people who face barriers to accessing care.

**Support with our resources:** Leverage our business scale and partner network to provide financial and non-financial support to social causes and communities impacted by adversity.

**Partner for collective impact:** Collaborate and form partnerships with other organisations to accelerate and enhance our impact, meaning we can support people beyond our usual reach.

**Support and invest in community development and resilience:** By creating opportunities, fairly and transparently, as well as ensuring we are a fair-trading partner.

**Measure our social contribution:** Evaluate and report on how we are maximising support to our communities.

## Our progress

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Over the last year, across all our markets we were involved in a vast number of activities in support of local, regional and national causes. We partnered with the International Agency for the Prevention of Blindness (IAPB) to further our mission of preventing avoidable sight loss and enhancing quality of life for even more people. Working alongside IAPB, we'll keep empowering individuals and communities by advocating for policy changes and breaking down barriers that can stand in the way of good eye health.

“It’s fantastic to welcome Specsavers as members of IAPB. Their commitment to our shared mission of ending avoidable sight loss is real, entirely values based and vitally important. By combining our strengths, we’ll be even more effective in empowering communities and advocating for better eye health for everyone, everywhere.

**Caroline Casey** President IAPB



**Our annual review 2024 - 2025**  
Sustainably making a difference



Left: Volunteers at the Oxford Crisis Skylight pop-up clinic. Right: Josie Forte, Optometry Director at Plymstock, meets a Big Issue vendor ahead of accessing her free eyecare.

Here are some other highlights:

### The UK and the Republic of Ireland

**Our stores and support teams gave more than £1.6 million to charities and good causes.** Alongside our longstanding support for Glaucoma UK, Blind Veterans UK, the British Citizen Awards, Guide Dogs for the Blind Association and Hearing Dogs for Deaf People, we supported numerous local charities.

**Our support for people experiencing homelessness continued through our work with charities and social enterprise partnerships,** including Vision Care for Homeless People (VCHP), The Big Issue, Crisis, Focus Ireland and Simon Community NI.

Our ambition is for anyone experiencing homelessness to access free, appropriate eye and hearing care. In collaboration with our partnerships, we're developing new clinical delivery models, enabling VCHP clinical growth and influencing government policy and systems.

Due to the breadth of homelessness experiences, we identified the need for a hybrid approach. Our model of clinical care now involves optics and audiology clinics in many of our stores (including an out-of-hours option) as well as in the community through pop-up services at charity hubs and as part of the annual Crisis at Christmas campaign.

**1,000**  
people accessed free eye and hearing care last year through our homelessness programme.



## Northern Europe

In Denmark, our collaboration with Blue Cross Denmark involved opening some stores after hours to conduct free sight tests and dispense glasses to almost 270 socially disadvantaged people.

In Sweden, we continued our partnership with the Swedish Association of the Visually Impaired. In addition to financial support, our optometrists participated in nation-wide events offering free clinical advice and information about eye health issues.

In Norway, a team of volunteers from our stores travelled to Zanzibar as part of our Give Sight in Tanzania humanitarian project, where they conducted more than 1,600 sight tests and gifted thousands of glasses and sunglasses to people in need. Locally, our Norwegian stores donated 10 NOK per sight test to MOT Norge in support of their work with young people to build resilience and courage.

In Finland, we supported the Hyvää Joulumieli Christmas campaign, a collection that purchases food gift cards for low-income families during the festive period.

In the Netherlands, for the fifth consecutive year, we donated a proportion of every frame and hearing aid sold to The Salvation Army. Our contribution totalled €182,500 which was used to support the charity's community centres, offering a vital service including meals and assistance for people with a variety of needs.

Our community support extended to: The Salvation Army in the Netherlands (top left), the Swedish Association of the Visually Impaired and our Give Sight in Tanzania project.





Top: Kamar Kaur from Specsavers Te Rapa mentoring as part of the Post Graduate Diploma in Eyecare at the Pacific Eye Institute in Fiji.



Left: Gurindji Waanyi contemporary Aboriginal artists, Sarrita and Tarris King, whose artwork entitled 'My Country's Story' featured on our 2024 Australian limited edition glasses for The Fred Hollows Foundation.

## Australia and New Zealand

**Our teams donated A\$2.4 million to charities and good causes and raised an additional A\$83,000 in direct fundraising.**

**After 16 years of partnership with The Fred Hollows Foundation, we surpassed a total of A\$10 million in donations.** Our funding has helped enhance access to eyecare for Aboriginal, Torres Strait Islander, and Pacific Islander communities. The Foundation's mission is to develop sustainable models of eyecare in order to end avoidable blindness in these communities by strengthening local health systems and expanding the eye health workforce.

Last year, our donation of A\$1.36 million to The Fred Hollows Foundation's Indigenous Australia Program helped the foundation and its partners to perform more than 15,500 eye tests, provide 3,236 pairs of glasses and support just over 4,000 eye surgeries, screenings and treatments for cataracts and diabetic retinopathy.

# 500,000

children have benefitted from the Kids Go Free initiative since its launch in 2016.

We also donated NZ\$170,000 to The Fred Hollows Foundation New Zealand to support their work in the Pacific through the Mobile Eye Clinic and Pacific Eye Institute in Fiji. This helped to deliver more than 30,000 eye health consultations, conduct 1,807 eye surgeries and 1,211 diabetic retinopathy treatments and dispense 2,438 pairs of glasses. The funding also supported students completing a Postgraduate Diploma in Eye Care or Ophthalmology and a Master of Medicine (Ophthalmology) at the Pacific Eye Institute in Fiji where we facilitated teaching placements to provide subspeciality lecturing and clinical mentoring.

Through our Kids Go Free programme in New Zealand, our store eye teams carried out more than 71,000 free eye tests to children under 16, removing a potential cost barrier and helping parents to keep track of their children's eye health and take any preventative measures.

A new partnership with Central Australian Aboriginal Congress enabled us to donate our Advance hearing aids to patients who are unable to afford such assistance and ineligible for Hearing Australia funded services. Many of these patients have spent most of their adult life with hearing loss due to chronic otitis media, an infection of the middle ear, during childhood.

## Canada

Through our continued partnership with Lions Club International, our stores collected used and unwanted frames in good condition to be refurbished and distributed to communities in need through the Lions Recycle for Sight programme.

We were recognised in Canada's Best Workplaces™ for Giving Back list. Colleagues participated in meaningful ways to support their local communities: volunteering at food banks, participating in a shoreline cleanup, and offering free glasses adjustments at a local seniors' centre.

## Supply chain

We continued our partnership with Siriraj Hospital to conduct lazy-eye screenings and sight tests in elementary schools within the Bangkok Noi district and identified further opportunities to support refugee children.

Our global supply chain teams and manufacturing and distribution sites volunteered more than 2,000 hours to support community initiatives and raised more than £7,200 for local charities.





We'll continue to systematically reduce emissions by increasing our procurement of renewable electricity and reducing the carbon footprint of our stores, support offices and supply chain sites, while building resilience against climate change impacts.



## 2. Products and materials

Our ambition is to be the market leader for sustainable optical and audiology products and services. We're aiming for our materials to come from more sustainable sources, incorporating circular thinking into our practices and products.

This involves reducing the amount of unsustainable material used in our products, while maintaining their integrity and quality. To us, unsustainable means any material made from a virgin, non-renewable resource, that does not quickly biodegrade or cannot be easily recycled in mainstream or specialist systems.

Through clear objectives, we'll ensure 44% of our frames include bio-based or recycled materials by 2026, putting us on a trajectory to reach 100% of frames globally to be made in this way by 2030. In addition, we'll seek solutions to reduce the impacts of our products at end of life and support communities affected by plastic pollution.

## 3. Packaging

Packaging plays an important role in protecting our products from damage, ensuring they are transported safely to our stores and customers. However, our goal is to remove all unnecessary packaging, redesign packaging for circularity, and only procure materials from more sustainable sources.

By 2030 we will:

Reduce the  
volume of packaging  
we use by  
**30%**

Increase the  
recycled content  
of our packaging to  
**30%**

Ensure  
**100%**  
of our packaging  
is recyclable

Sustainably source  
**100%**  
of our paper  
and cardboard

## 4. Water

We depend on water for processes across our supply chain and for our own operations. We intend to further reduce our water usage by implementing additional initiatives and investigating improved ways to collect data on our water footprint.



## 5. Resource management

We believe that once our products and packaging have served their purpose, they should be recycled and reused, ensuring our materials, if properly disposed of, never become waste.

We have three key priorities in this area:

**Reduce the volume of materials used in our products, packaging and goods**  
not for resale across all our operations.

**Achieve zero waste to landfill by 2030.**  
To achieve this, all waste we produce must be recycled or reused through existing disposal or recycling infrastructure.

**Design for circularity.**  
To avoid our product and packaging materials becoming waste we need to design for recyclability and reuse. We have committed that all our packaging will be 100% recyclable by 2030.

## Our progress

Here's a summary of our 2024/25 activity:

### Decarbonisation

**We made good progress on our pathway to decarbonisation** by driving down our indirect emissions (Scope 2) associated with the electricity we buy.

**We completed the first of our support office heat decarbonisation projects** where transferring from natural gas usage will reduce the Scope 1 carbon footprint of our Nottingham office by 34tCO<sub>2</sub> per annum.

**For Scope 3 emissions, we engaged with our top 100 suppliers** using a new global carbon reporting platform to gain further data and information on their carbon emissions and decarbonisation pathways.

Further information on our Greenhouse Gases Emissions Performance can be found on our websites.

### Products and materials

**30% of our frame range now includes more sustainable materials**, a significant increase from 16% the previous year. This progress highlights our ongoing commitment and efforts to continuously improve the environmental impact of our products.

**55%  
to 66%**

We increased our use of renewable electricity from 50% to 66% through renewable energy purchases in Northern Europe, Australia and the Republic of Ireland.

# 76 tonnes

of plastic packaging was eliminated in the UK alone — removing unnecessary material without compromising product protection or quality.

We conducted Life Cycle Assessments on key products across our optics categories, including frames, ophthalmic lenses and contact lenses. This will enable us to better understand the impact at all product life stages so we can develop action plans to address critical areas.

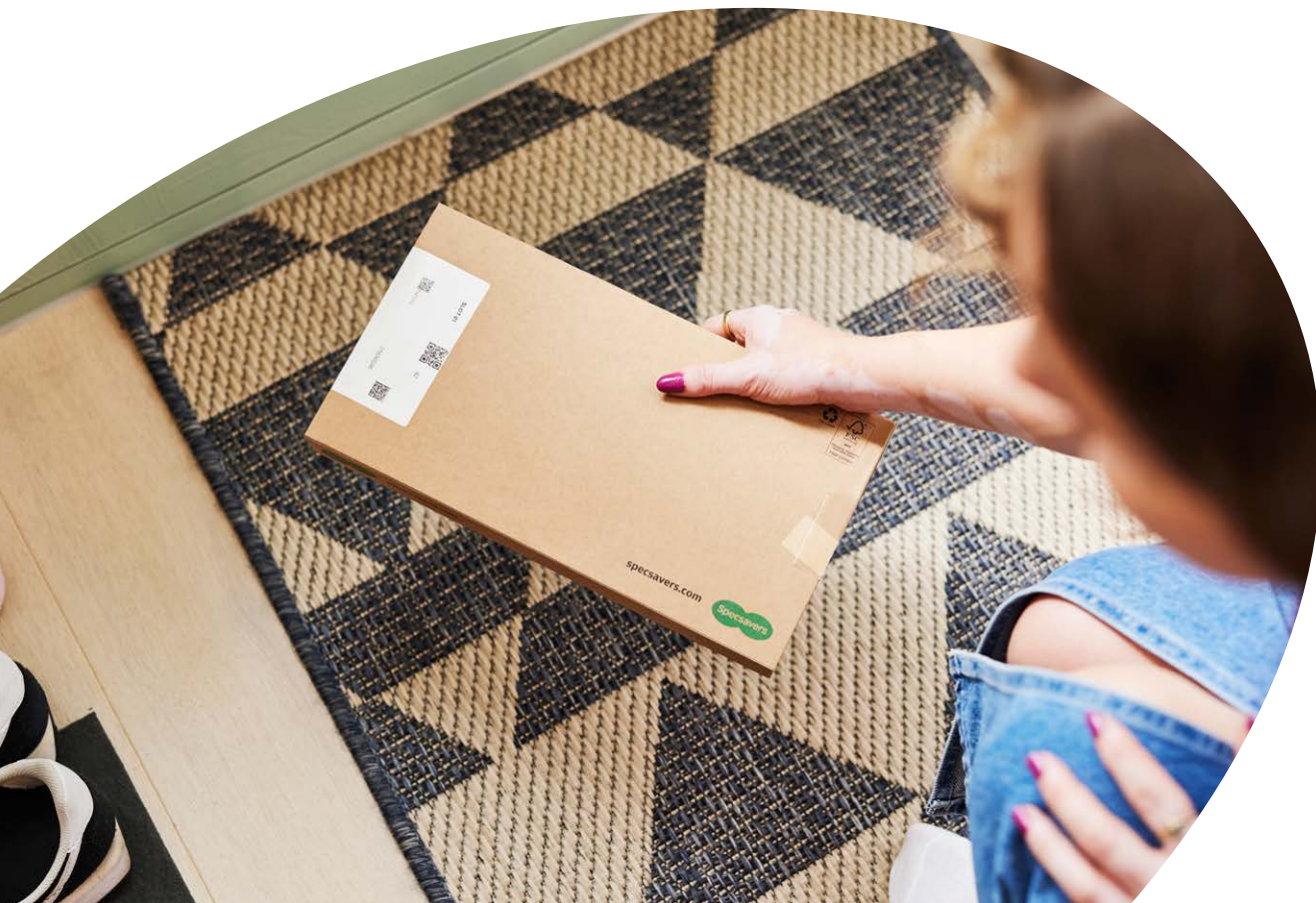
**Engaging our colleagues is key to driving sustainable progress.** We ran a series of training workshops on sustainable product claims, responsible sourcing, product end-of-life, and the circular economy.

## Packaging

We focused our efforts where we can have the greatest impact – **by removing as much plastic from our operations as possible.**

**As part of our ongoing commitment to enhance recycled content in our packaging materials,** we converted 679 tonnes of polybags used for our frames to 100% low-density polyethylene (LDPE), all certified to the Global Recycled Standard (GRS).

**We continued transitioning our paper-based packaging to Forest Stewardship Council (FSC) certified sources.** We shipped more than 6.6m contact lens mailer boxes globally, totalling 388 tonnes of cardboard made from FSC-certified board. This certification guarantees that our materials support responsible forestry, helping to protect biodiversity, support fair labour practices, and promote sustainable sourcing.





### Water

**We reduced our annual water usage by 11.4% across our global manufacturing and distribution sites by further improving the ophthalmic lens washing processes.**

### Resource management

**We launched a pilot partnership with Müll Club, enabling up to 500 Easycare (contact lens subscription) customers across the UK to return their used contact lens blister packaging which Müll Club then turns into household objects. We're tracking data on interest and volumes to understand how best to engage our customers in reducing their contact lens waste.**

**In Australia, the UK and Norway, we collectively recycled more than 106 tonnes of optical waste through regional partnerships. These collaborations offer end-to-end recycling solutions for our customers' unwanted frames, contact lenses and contact lens packaging.**

**“We’re making great progress towards our sustainability goals, we know there’s more to do but I am immensely proud of what we have achieved so far. We remain committed to making the right choices for our planet, people and communities.**

**Tracy Pellett**

Global Sustainability and Business Transformation Director

# Safeguarding human rights and trading ethically

## Our position

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Safeguarding human rights and trading ethically are critical to the way we operate. Our customers not only expect us to care for them, but also that our business is underpinned by a supply chain that treats people with dignity and respect.

Understanding where our products are sourced and made, as well as the risks and the opportunities across our operations, is an essential part of our due diligence. This includes the products and services we sell, the technology and equipment we use, in addition to the ways in which they reach our stores and support offices.

We're proud of the strong, long-term relationships we have with our suppliers. Through our partnerships, we set clear expectations including the behaviours and standards they must always demonstrate when working with us. Our Supplier Code of Conduct, based on the Ethical Trading Initiative Base Code and International Labour Organisation Conventions, covers respectful employment standards, safe working environments, and ethical business practices.

We perform regular audits to ensure that neither bribery and corruption nor slavery or human trafficking exists in our supply chain. Full details of our Modern Slavery Statement can be found on our websites.

## Our plans

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We're committed to being ethical across our business, and making a positive difference by:

**Establishing a robust approach to human rights and ethical risks.** Implementing industry best practice and conducting independent auditing is supported by an internal governance processes and training to manage any non-compliance.

**Regularly engaging with our key suppliers to ensure they are updated on our plans and understand our requirements.**

**Ensuring commitment to our supplier code of conduct** as part of a new supplier engagement process.





## Our progress

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In 2024/25:

**We connected with 97 sites in the SEDEX ethical and environmental data platform**, which covers 54% of our goods for resale tier 1 suppliers. Our ambition is to connect with all tier 1 manufacturing sites during 2025 to allow us to report more transparently on our suppliers' performance, identify risks with great accuracy and therefore focus our efforts accordingly.

**We standardised the process where suppliers are required to confirm compliance in line with our Supplier Code of Conduct.**

**Over the last two years, 65 supplier sites have taken part in independent third-party social and environmental audits.** Where non-compliances are found we work closely with suppliers to resolve and improve standards, so that workers and the environment are protected. As a result, we're seeing significant improvements in the correction of non-compliances within a shorter timeframe.

**We completed internal ethical training for our buyers and category managers.** As the key contacts for our suppliers, their role is critical in ensuring that commercial decision-making is aligned with our ethics and best practice.

**We introduced a quarterly governance process with our supply chain leadership team.** This group, which includes executive board-level representation, ensures that suppliers are held to account in instances of non-compliance.



# Looking forward

That, as they often say at the end of a sporting tournament, is 'another year in the book'. Or is it?

As I reflect on these pages, I am, as ever, overwhelmed at what's been realised by our incredible teams:

- A commitment to caring for even more people around the world, through enhancing and expanding our offer
- The innovation that's led to even greater value and world-class expertise for our 48 million customers and patients
- A dedication to continuous development and opportunities for our partners and colleagues.
- A positive impact on our communities and the planet
- An evolution of our processes behind the scenes, delivering an ever-more efficient operation.

The results of these, and many other incredible achievements, are evident in the detailed surveys and analysis we undertake:

- The advancements we've made as a Great Place to Work®
- Our partner surveys, charting the progress we're making in support of our store leaders and identifying where we can improve further.
- Our customers' satisfaction scores, chronicling our impact

I am incredibly proud of our scorecard. But this *isn't* a sporting tournament. There's *no* finish line, *no* final round, *no* match point.

Our purpose to 'Change lives through better sight and hearing' isn't measured by a scoreboard, and it's not assessed by comparison to our competitors. Instead, our cause is an unrelenting, unending crusade to continually improve what and how we do things. It's the pursuit of a goal that's always just out of reach.

For 40 years now, Specsavers colleagues have embodied core values and behaviours that keep us on track in our quest. To be:



**Collaborative** – to work together as one business to deliver our purpose

**Curious** – to question, explore and seek out diverse perspectives to develop our knowledge and understanding

**Courageous** – to challenge the status quo, experiment with good ideas, be brave, bold and fast in our decision making

**Compassionate** – to care, support and help each other

**Commercial** – to treat money wisely and make decisions that are good for our customers, our partners, our people and good for the long term.

Faced with the fast-moving, dynamic, and tumultuous times we live in, the commitment of our teams to live these values each day in delivering our long-term plans is ever more important.

Today, 40 years on, these core principles still inspire us to improve every single day – and ensure we never think of what we've achieved as, simply, 'another year in the book'.

One of our most recent causes for celebration is that Doug was made a Commander of the British Empire (CBE) by His Majesty King Charles in this year's King's Birthday Honours List, for his services to business and trade. This incredible honour recognises the hard work and commitment of each and every one of our 50,000-strong team in helping to make a positive difference to so many people.

So, as always, a huge thank you to our teams – our partners and colleagues, across every part of our business in every region where we operate – who, together, make Specsavers what it is.

Without our unique partnership model, we would frankly be 'just like any other business' – competing against others and responding to whatever challenges arise.

But with our partnership – with the energy, passion and skills of more than 50,000 colleagues and partners around the globe – we're able to better shape life-changing outcomes for our communities and society at large.

And that's what we're all about.



**John Perkins**

Chief Executive Officer and Chief Sustainability Officer

# Specsavers Executive Board

## **Doug Perkins CBE**

Chairman and Founder



In addition to his role as Founder and Chairman of the group, Doug has been a qualified and registered optometrist for more than 50 years. As such, Doug maintains specific responsibilities for the advancement of professional standards and supporting the regulatory agenda across our markets.

He and his wife, Mary, established Specsavers' joint venture partnership model in 1984, with the vision of making eyecare affordable to all.

## **Dame Mary Perkins**

Founder



A qualified and registered optometrist for more than 50 years, Mary is involved in many areas of the business including driving customer service standards, championing our values, and shaping our corporate responsibility commitments.

Mary also plays an active role with a number of national and local charities and was made a Dame Commander of the Order of the British Empire in 2007. She was appointed ambassador for Vision Aid Overseas in 2009.

## **John Perkins**

Chief Executive Officer  
and Chief Sustainability Officer



John is responsible for the overall success of the partnership and the strategic direction of the group. John joined Specsavers in 1998 and worked in stores and operations, as well as the international team, before joining the board in 2003.

A qualified chartered accountant with an MBA in retailing, John spent three years with Deloitte before joining Specsavers.

## Nigel Parker

Chief Strategy  
and Growth Officer



Nigel joined Specsavers from ophthalmic lens manufacturer, Essilor, in 1997. In 2006, he joined the board to provide leadership to Australia, New Zealand and Northern Europe – and went on to spearhead our expansion into Canada and the US, where he now holds overall responsibility.

Nigel is responsible for driving our Growth, Innovation and Strategic agendas, as well as leading Group Retail, Change, and Strategic Initiatives; and our Blended Experience programme.

## Pauline Best

Chief People Officer



Pauline first joined Specsavers (from Vodafone) in 2008. During her 10 years in the business, she led the delivery of our people strategy, as well as establishing the core foundations of our people structure and processes.

From 2018, Pauline spent four years working across different businesses including serving on the Board of Vertu and as an executive coach and HR consultant. Pauline returned to Specsavers in 2022 with global responsibility for our people agenda.

## Paul Fussey

Chief Financial  
and Commercial Officer



Paul joined Specsavers in 2009, becoming Managing Director for Australia and New Zealand in 2014. Returning to the UK in 2017 for his current role, he now has overall accountability for our group finance, tax and treasury, legal, supply chain, commercial and technology functions.

A former Finance Director at Boots UK, Paul also held Divisional Finance Director and Managing Director (Manufacturing) roles there, with operations across Europe and the Far East.

## Peter Wright

Chief Marketing Officer



Peter is responsible for the protection, representation, and development of our brand, supporting business growth while ensuring that customer experience continues to improve in an omni-channel world.

Peter joined Specsavers in 2021, following 10 years at IKEA (INGKA) where he most recently held the role of Chief Marketing Officer with responsibility across 30 countries. Prior to this, he also held Marketing Director roles at Thorntons and Tesco.



## Simon Hawkins

Group Strategy Director



Simon joined Specsavers in 2002 as part of our international team. Since then, he's held many marketing and commercial roles, including stints in both Australia, as Marketing Director, and Northern Europe as Trading Director.

In 2019, Simon took up the role of Group Strategy Director, responsible for the innovation and growth activities that support our long-term success. He joined the Specsavers Executive Board in 2022.

## Peter Bainbridge

Regional Director  
Europe



Peter joined Specsavers in 2016 as our UK/ROI Retail Director, and also worked across our Domiciliary and Audiology operations, before becoming General Manager of our UK/ROI optics business. Peter joined the Specsavers Executive Board in 2022, with responsibility for Optics in the UK, Ireland and Spain. In March 2025, he became Regional Director – Europe, with responsibility for our optics, audiology and Newmedica businesses in the UK, ROI and Northern Europe region. As a trained pharmacist, prior to Specsavers, Peter led the pharmacy and beauty businesses as Trading Director for Boots.

## Carina Hummel

Managing Director  
UK / ROI Optics



Carina's career at Specsavers began in 2000, when she started as an optical assistant. Following this, she carried out various roles in stores and within our training and retail support teams – before moving into Audiology in 2016, taking various roles including Head of Retail, Director of Operations and General Manager. Carina later became Managing Director for our audiology business in the UK and ROI and Spain, with responsibility for the growth and strategy of the business, before moving to become Managing Director – UK/ROI Optics in March 2025. She is also a qualified coach and mentor.

## Charlotte Hall

Managing Director  
UK / ROI Audiology



Charlotte joined the Specsavers Supply Chain in 2021 as Product Development Director for Contact Lenses and Audiology, before becoming Supply Chain Commercial Director in 2023. In March 2025, she moved to the UK retail business to take up the role of Managing Director – UK/ROI Audiology, leading Specsavers' audiology strategy, growth and operations.

Before joining Specsavers, Charlotte worked within the grocery sector, having previously held roles with both Asda and The Co-Op.

## Richard Owens

Managing Director  
Northern Europe



Richard joined Specsavers in 2004, as a Regional Development Manager, and held many roles within our retail support teams in the UK. In 2008, he became Director of Retail Advancement for Australia and New Zealand, returning to the UK business in 2010.

Three years later, Richard took on the role of Director of Retail for our Northern Europe region. In 2022, he became Managing Director – Northern Europe and joined the Specsavers Executive Board.

## Paul Bott

Managing Director  
Australia and New Zealand (ANZ)



Paul joined the Specsavers Executive Committee in 2017 as Group Commercial Director, before returning to Melbourne in 2019. Paul now has overall responsibility for our ANZ operation.

Joining Specsavers in 2005 as a Commercial Manager, Paul went on to establish our Hong Kong office, prior to working on our ANZ market entry. As Commercial Director, Paul led the region's core functions, from IT to Optometry. A chartered accountant, Paul has also worked for both Andersen and Deloitte.

## Bill Moir

Managing Director  
North America



Bill joined Specsavers Australia in 2017 as Trading Director before becoming Group Digital and eCommerce Director in 2020. He moved to Canada as Managing Director – North America in 2021 and joined the Specsavers Executive Board in 2022.

Before joining Specsavers, Bill worked with Coles Group in Australia, having previously held various board-level roles in retail organisations across the UK and Europe.

## Paul Robinson

Managing Director  
Supply Chain



Paul joined Specsavers in 2013 as part of the UK and ROI product team. He moved in 2017 to become the Product Director in Northern Europe, spending the following six years within our global Supply Chain function. In March 2025, Paul became Managing Director – Supply Chain, delivering the effective sourcing, manufacture and flow of products around the world, alongside his global team.

Before joining Specsavers, Paul worked for Walgreens Boots Alliance, holding various commercial roles.

“ It’s the **feeling**  
of being able to

**GROW**  
**YOUR**  
**OWN**  
**WAY**”







At Specsavers, you're able to develop your career exactly how you want to. Find out just how many amazing and rewarding opportunities we have.

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