Public Perceptions Research

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02 Summary of findings

Summary of findings (1)

Satisfaction with the **overall experience** of an opticians/optometrist practice has increased this year (89% vs. 87% 2025). Patient satisfaction has also increased when it comes to the **time the optometrist gave to address needs properly** (89% vs 87% 2025). A new question for this wave shows that 89% of patients are satisfied with how long they had to wait for an appointment.

Just over three quarters (76%) are satisfied with overall **value for money**. Satisfaction has also remained stable when it comes to **the experience of buying glasses or contact lenses** (72%).

The youngest age groups (16-24), ethnic minorities, and those with at least one vulnerability marker are **less likely than average to be satisfied across almost all satisfaction metrics**.

Summary of findings (2)

More this year say they would go to **an opticians/optometrist practice** in the event of an eye problem (41% vs. 36% 2025) – this remains ahead of a GP practice/surgery, which has seen year-on-year decline (23% vs. 27% 2025). Those in **England** remain less likely to turn to an opticians/optometrist practice first (38%), while those in Wales (60%) and Scotland (50%) are more likely to do so. Those in Northern Ireland are no more or less likely than average (47%).

Confidence in a high standard of care from an opticians/optometrist practice sees a small but significant increase (94% vs. 93% 2025), as have comparators: pharmacy (89% vs. 86% 2025), dental practice/surgery (84% vs. 80% 2025) and a GP practice/surgery (82% vs. 78% 2025).

More this year say they are **confident in managing their own eye health** (90% vs. 85% 2025), which is driven by more who say they are very confident (38% vs. 34% 2025).

Summary of findings (3)

Not being able to be seen on the same day is still the most common reason why some would not visit an opticians/optometrist practice first in the event of an eye problem (30%).

More this year say they have not felt uncomfortable about visiting an opticians/optometrist practice (53% vs. 49% 2025). For those that have felt uncomfortable, the cost of glasses/contact lenses (21%) and sight test/eye examinations (15%) continue to be the main reasons why. The most common reasons for not having a sight test/eye examination in the last two years are because they didn't experience any issues with their eyes (41%) and just didn't think about it (36%). Cost of glasses/contact lenses (24%) and of the sight test/eye examination (19%) are also barriers for some.

More participants this year say they have had a sight test/eye examination **in the past two years** (84% vs. 80% 2025). Just 3% say they have never had one.

Summary of findings (4)

One third (33%) have shopped around while more than three in five (64%) knew the price before attending their appointment – both remain in line with previous waves.

More this year say they bought either their glasses or contact lenses from the same opticians/optometrist practice where they had their sight test/eye examination (83% vs. 79% 2025). Encouragingly, fewer this wave agree when asked if they **felt pressured** to purchase specific brands or types of glasses or contact lenses (20% vs. 24% 2025) and more strongly agree that pricing was **clear and transparent** when they last purchased glasses or contact lenses (36% vs. 32% 2025). Just under three quarters (73%) feel that the price they expected to pay **matched** the price they ended up paying.

New to this wave, just under two in five (38%) say they spent up to £100 in the last 12 months on eye care services. Just under half (47%) spent between £101-500, while one in ten (10%) spent between £501-2,000.

Summary of findings (5)

Of those who were dissatisfied with their overall experience, more than four in five (81%) say they **did not complain**, while 35% **considered complaining** but decided not to. 15% say they **complained**.

Participants were asked **who they think is responsible** for notifying the Driver and Vehicle Licensing Agency (DVLA) or Driver and Vehicle Agency (DVA for Northern Ireland) if a patient's sight test falls below the standard required to drive safely. More than half (51%) think responsibility lies **with the patient**, while just over two in five (41%) say it lies **with the optometrist**.

Participants were asked if they would be **put off** going for a sight test/eye examination if the optometrist was required to automatically notify the DVLA or DVA of patients who fall below the standard required to drive safely. 15% say they would definitely be put off (compared to 13% in 2017).

Contents

01 Background and methodology

Background and methodology

Since 2015, the regulator for the optical professions in the UK, the General Optical Council (GOC), has carried out an annual representative public perceptions survey to explore areas such as satisfaction levels with sight tests/eye examinations, confidence and trust in the optical professions, shopping habits and complaints.

Making decisions based on evidence is a strategic priority for the GOC. The findings of the annual survey are used to inform the policy work conducted both at the GOC and with stakeholder bodies across the optical sector. The GOC commissioned DJS research in 2024 to continue the long-standing annual survey.

The 2026 survey was redesigned by DJS Research in conjunction with the GOC. A copy of the questionnaire is published separately.

Fieldwork was conducted online and distributed to a sample using our UK consumer partner panel provider, Dynata. Fieldwork took place between **9 February – 2 March 2026**.

A total of **2,014 completes** were achieved. A full breakdown of the sample profile can be found in chapter 4.

Replicating the approach in previous waves, interlocking quotas were set on gender and age within UK nations in order to achieve a representative sample of the UK. Scotland, Wales, and Northern Ireland were over-sampled so that confident statistical analysis could be undertaken by nation.

As in the previous wave, data in this wave has been weighted to reflect a nationally representative sample of the UK population in terms of age, gender, and nation. It is important to take into consideration that waves before 2024 had been weighted to the 'boosted' profiles of Scotland, Wales, and Northern Ireland, rather than the actual representative proportions of those nations. While comparisons to previous waves have been made throughout this report, it is important to consider the different weighting schemes applied, although the difference is small (approximately 1% or less between weight schemes).

Throughout this report, the commentary provided on sub-groups is based on statistically significant differences, unless otherwise stated. The most relevant statistically significant differences are reported on in each question, meaning, there may be instances where some statistically significant differences are not discussed as they are not as relevant.

Note on statistics and confidence intervals

Participants in the research are only samples of the total population, so we cannot be certain that the figures obtained are exactly those we would have found if every single person in the United Kingdom aged 16 and older had been surveyed. However, we can predict the variation between the sample results and the true values from knowing the size of the samples on which the results are based and the number of times that a particular answer is given.

It is important to note that margins of error relate only to samples that have been selected using strict random probability sampling methods. However, in practice it is reasonable to assume that these calculations provide a good indication of the confidence intervals relating to this survey and the sampling approach used.

Size of sample on which the survey results are based	**Approx. sampling tolerances applicable to percentages at or near these levels (at the 95% confidence level)**		
	10% or 90% ±	30% or 70% ±	50% ±
2,014 (all participants)	1.3%	2.0%	2.2%
1,676 (all participants who have had a sight test/eye examination in the last two years)	1.4%	2.2%	2.4%
1,238 (all participants who have purchases glasses OR contact lenses)	1.7%	2.6%	2.8%

For example, with a sample of 2,014 where 50% give a particular answer, the chances are 19 in 20 (95%) that the true value (which would have been obtained if the whole population had been surveyed) will fall within the range of plus or minus 2.2 percentage points from the sample result, i.e. between 47.8% and 52.2%.

Notes on reporting

Where a 'patient' is mentioned in this report, it is defined as those who have had a sight test/eye examination in the last two years.

The General Optical Council wished to explore differences in access and experience within the sample. To enable this, analysis was conducted using 'vulnerability markers' throughout the report.

Where 'vulnerability markers' are mentioned in this report, these include those:

- With a disability
- Who have less than £25,000 of household income
- Not confident in managing their own eye health
- Going through a difficult life circumstance
- Consider themselves to be struggling financially
- Say they cannot afford essentials

Vulnerability markers have been grouped into four different categories:

- None
- One
- Two to three
- Four or more

Additional analysis has been conducted to explore whether access to, and experience of, optical services differs by area deprivation. Summary findings are included on slides 56–59, with a full report available separately.

Trend data has been significance tested. Statistically significant changes between 2025 and 2026 are indicated throughout with these arrows depending on the direction change:

⬆ denotes significantly higher than the previous wave

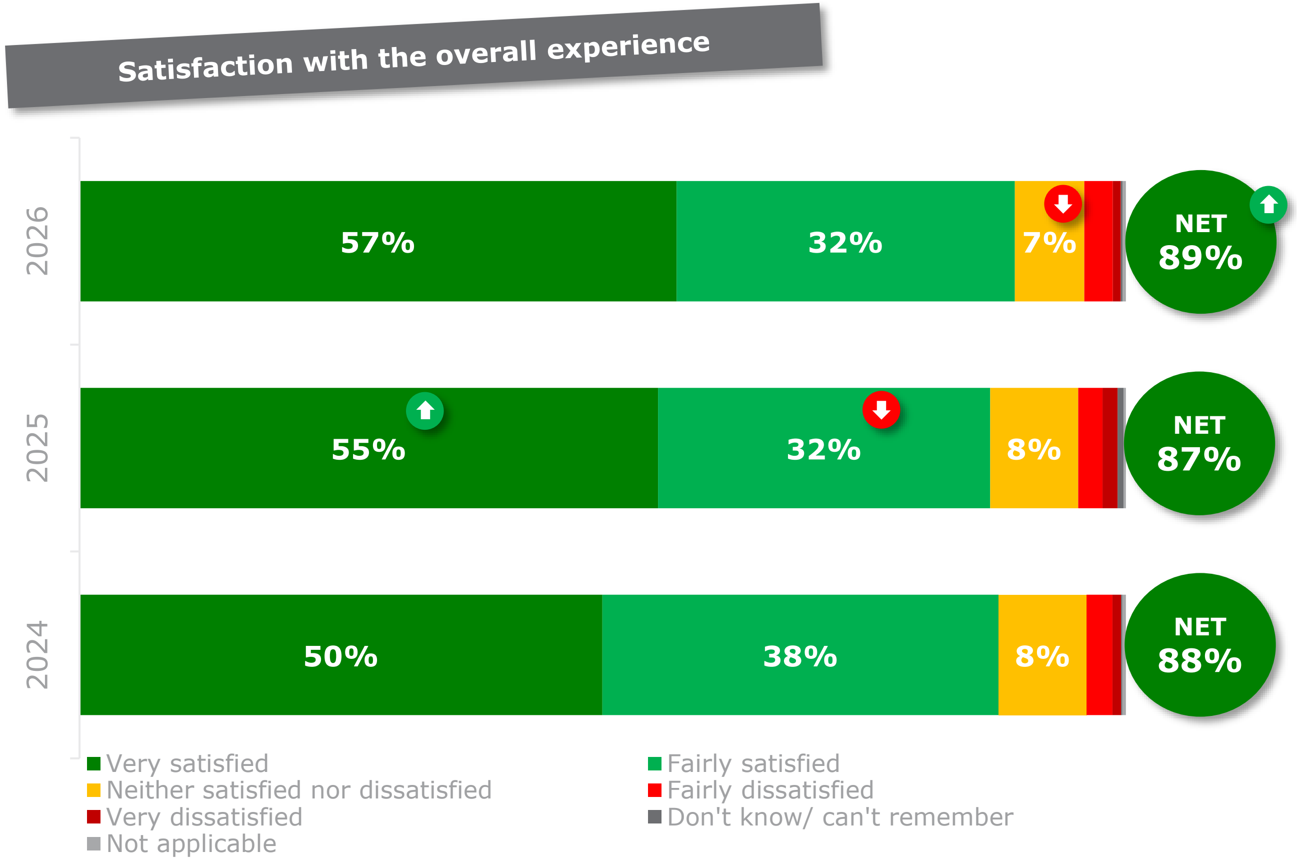
⬇ denotes significantly lower than the previous wave

03 Main findings

Satisfaction levels

Satisfaction with the overall experience

Satisfaction with the overall experience of the opticians/optometrist practice has increased this year with 89% satisfied overall (an increase from 87% in 2025), while fewer say they are neither satisfied nor dissatisfied (7% vs. 8% in 2025). Just 4% say they are dissatisfied.



Those aged 65 and older are more likely than those aged 16-34 to be satisfied with their overall experience (95% vs. 83%). A similar story can be found for those from a white background compared to ethnic minorities (90% vs. 86%).

Those in ABC1 social grades are more likely than average to be satisfied with their overall experience (90%).

Other groups more likely than average to be satisfied with their overall experience include those who:

- Had their sight test/eye examination within the last 6 months (93%)
- Are confident in both receiving care from an opticians/optometrist and in managing their own eye health (91% respectively)
- Those who spent up to £100 on eye care services in the last 12 months (93%)

In terms of groups who are more likely than average to be dissatisfied with their overall experience, these include those who:

- Have at least one vulnerability marker (5%)
- Have felt uncomfortable about visiting an opticians/ optometrist practice (5%)
- Are not confident in both receiving care from an opticians/optometrist (33%) and in managing their own eye health (15%)

Q018. Thinking of the last time you had a sight test/eye examination, how satisfied or dissatisfied were you with the following? **Base:** All participants who have had a sight test/eye examination in the last two years (1,676), 2025 participants (1,616), 2024 participants (1,599).

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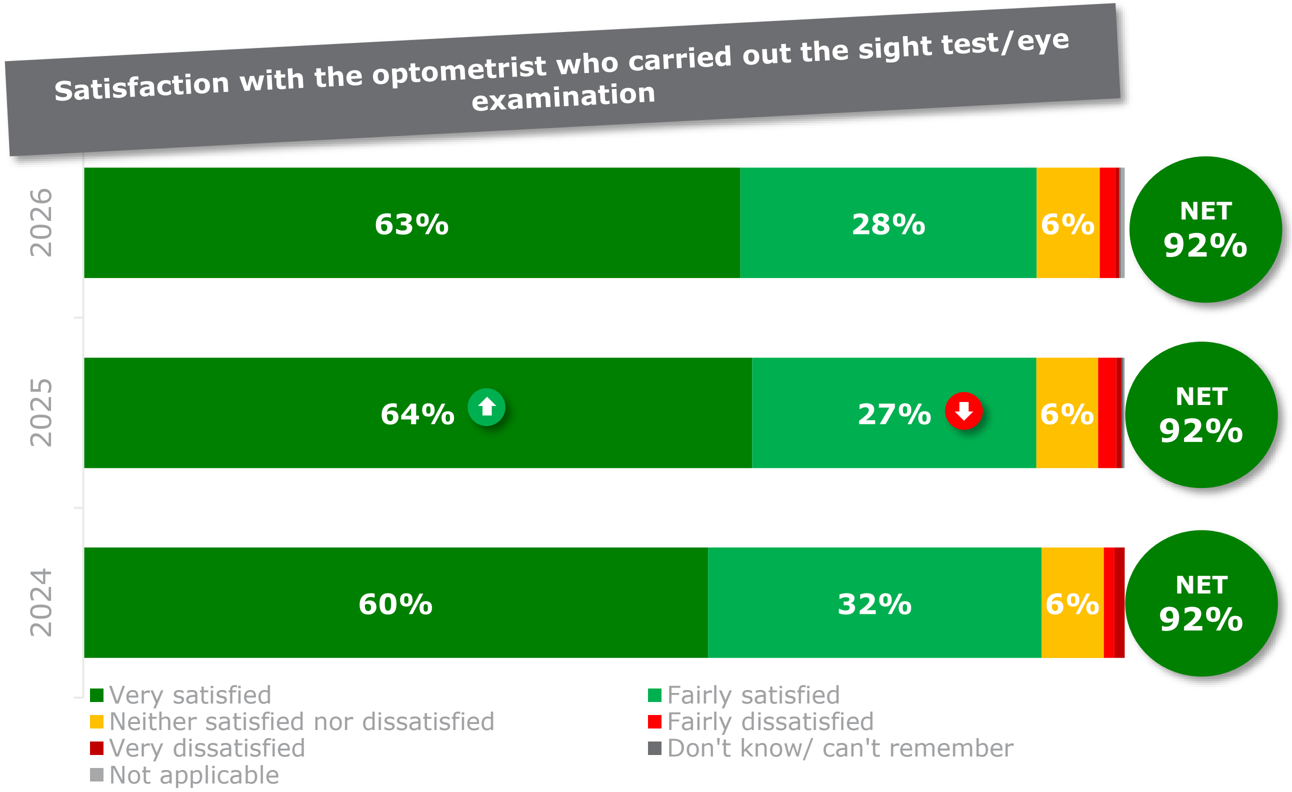
Satisfaction with the optometrist who carried out the sight test/eye examination

Satisfaction with the optometrist who carried with the sight test/eye examination remains stable this year (92%). Just 2% are dissatisfied, which is also comparable to previous waves.



Those aged 16-34 are less likely to be satisfied with the optometrist compared to those 65 and over (86% vs 98%). The same can be said for those from a white background compared to ethnic minorities (93% vs. 88%).

Those who are those confident in both receiving care from an opticians/optometrist and in managing their own eye health are more likely to be satisfied with the optometrist (93% respectively).

Groups who are more likely than average to be dissatisfied with their optometrist include those who:

- Have 2-3 vulnerability markers (4%)
- Are not confident in managing their own eye health (8%)
- Have felt uncomfortable about visiting an opticians/ optometrist practice (3%)

Q018. Thinking of the last time you had a sight test/eye examination, how satisfied or dissatisfied were you with the following? **Base:** All participants who have had a sight test/eye examination in the last two years (1,676), 2025 participants (1,616), 2024 participants (1,599).

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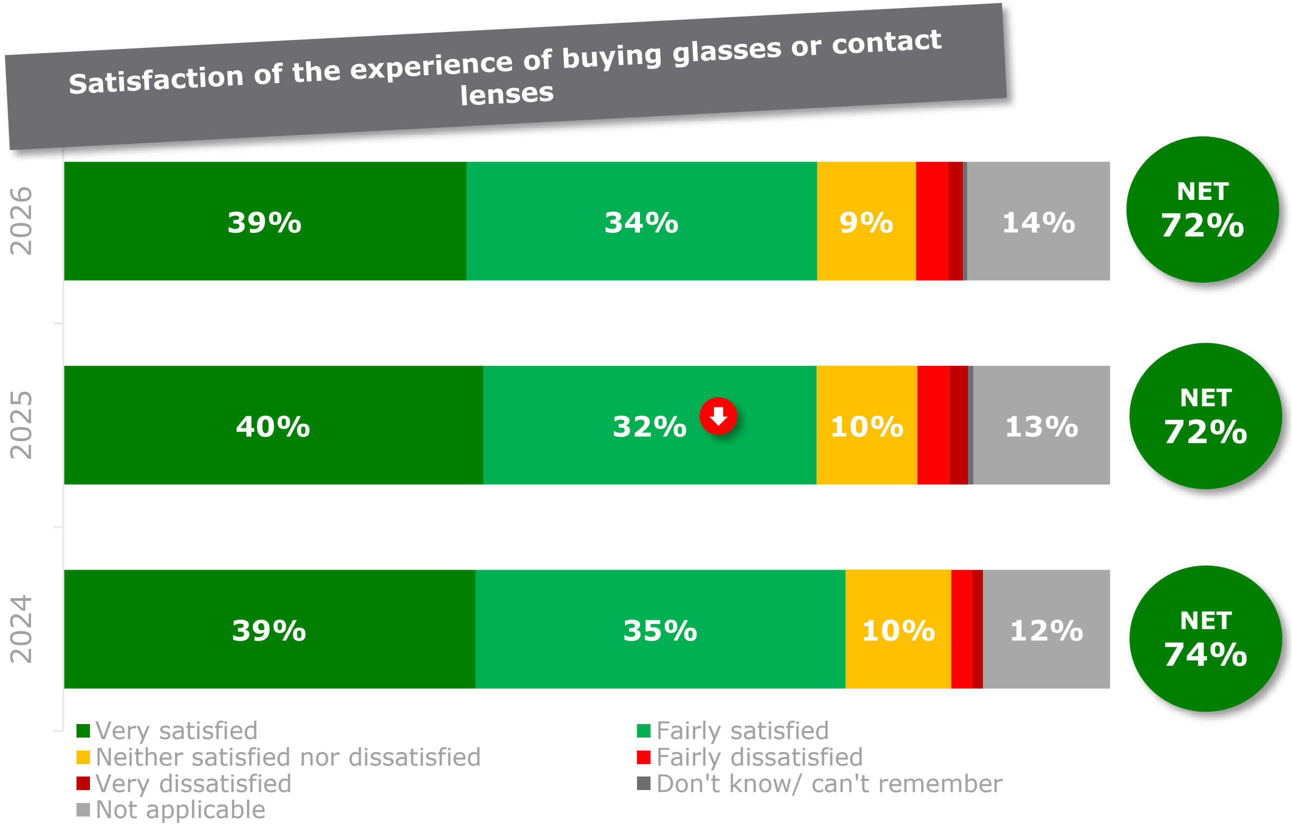
Satisfaction with the experience of buying glasses or contact lenses

Over seven in ten (72%) are satisfied with their experience of buying glasses or contact lenses, consistent with previous waves. The proportion who are dissatisfied remains low (4%).



Groups who are more likely to be dissatisfied include those who:

- Have at least one vulnerability marker (5%)
- Are not in work (10%)
- Are not confident in receiving a high standard of care from an opticians/optometrist practice (29%) or managing their eye health (17%)
- Spent between £101-500 in eye care in the last 12 months (6%).

Q018. Thinking of the last time you had a sight test/eye examination, how satisfied or dissatisfied were you with the following? **Base:** All participants who have had a sight test/eye examination in the last two years (1,676), 2025 participants (1,616), 2024 participants (1,599).

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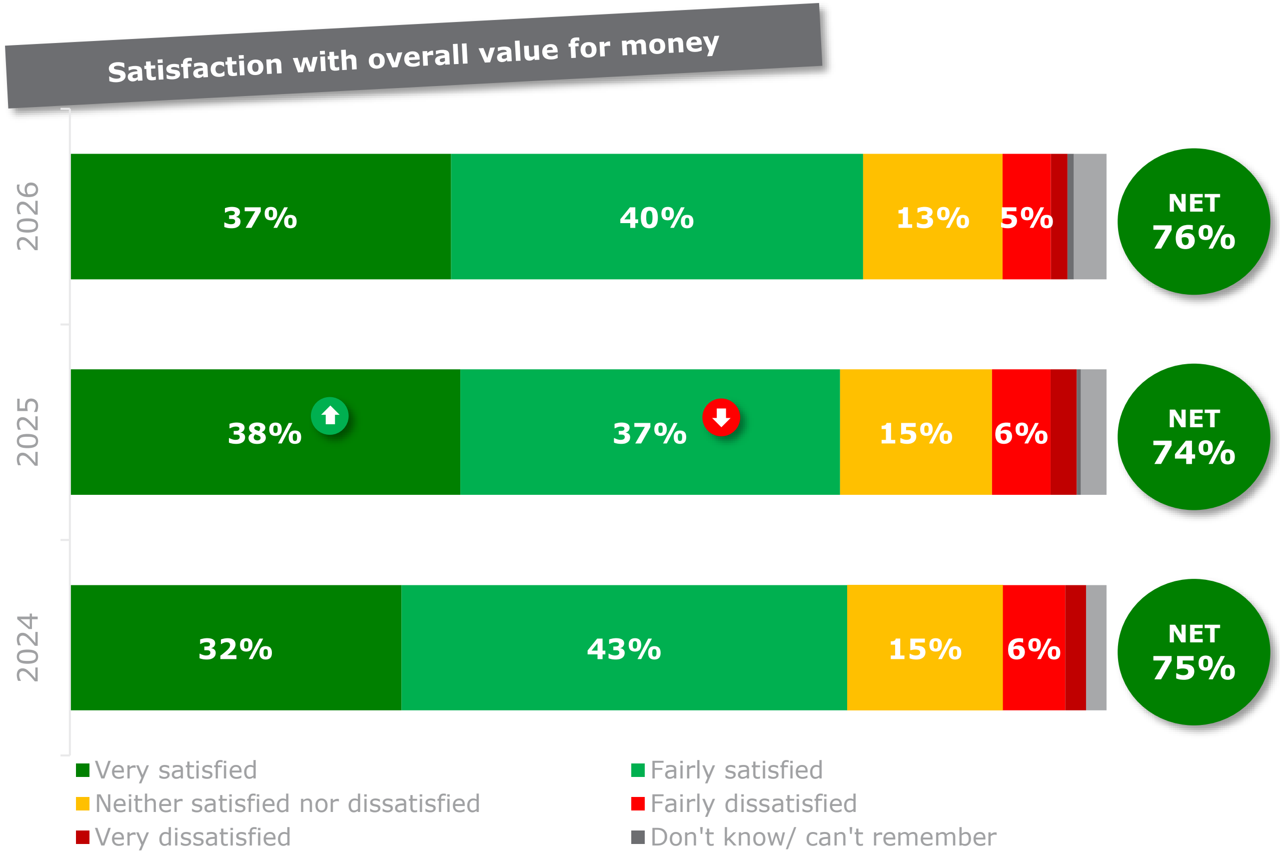
Satisfaction with value for money

Just over three quarters (76%) are satisfied with the overall value for money. A similar proportion remain dissatisfied (7% vs. 8% 2025).



Those aged 16-24, likely with less disposable income, are less likely than average to be satisfied with the overall value for money (70%). This is also evident when we look at income, with those on a lower income (£25k-£35k) also more dissatisfied with value for money (10%).

Those living in Scotland are less likely than average to be dissatisfied (2%).

Those with at least one vulnerability marker are more likely than average to be dissatisfied with value for money (9%), especially those with 4 or more (17%).

Participants who are not confident in receiving a high standard of care from an opticians/optometrist practice (40%) or managing their own eye health (23%) are more likely to be dissatisfied with the overall value for money.

Those who have had a recent sight test/eye examination in the last six months are more likely than average to be satisfied with the value for money (82%). The same can be said for those who knew the price before attending (78%).

Q018. Thinking of the last time you had a sight test/eye examination, how satisfied or dissatisfied were you with the following? **Base:** All participants who have had a sight test/eye examination in the last two years (1,676), 2025 participants (1,616), 2024 participants (1,599).

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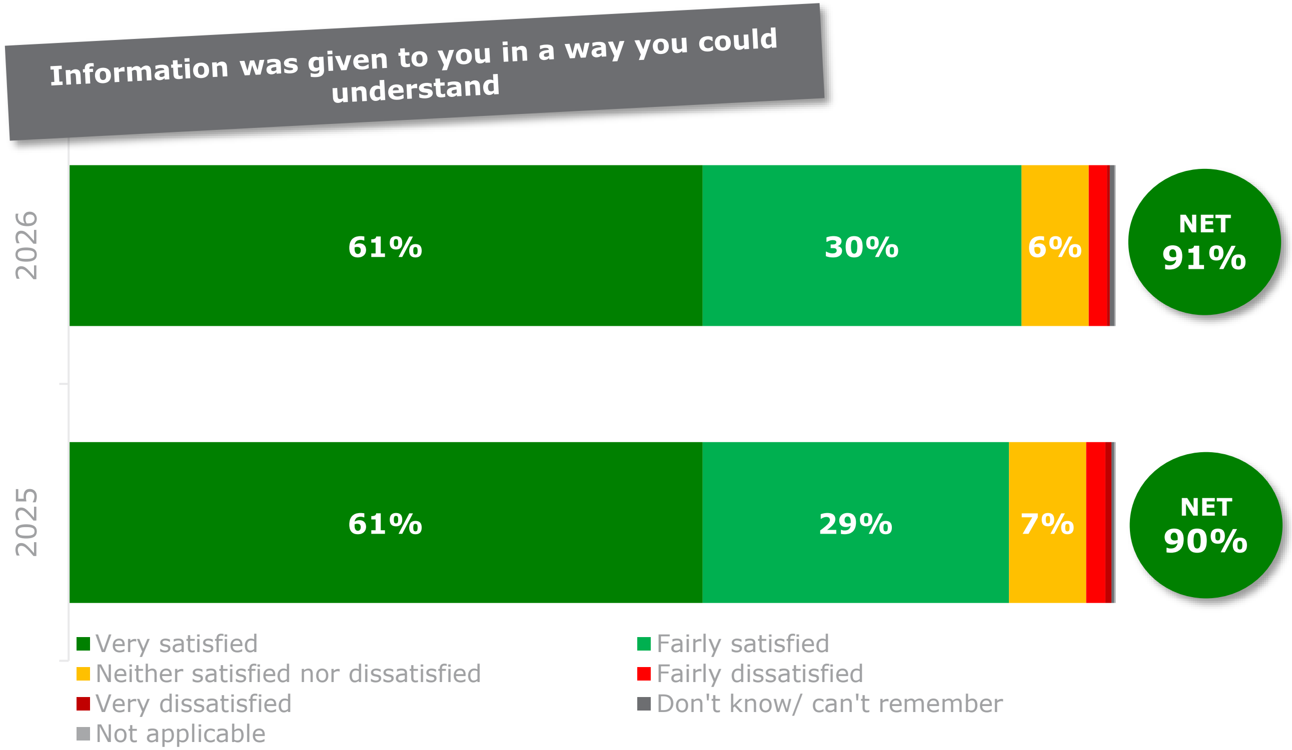
Satisfaction with delivery of information

Just over nine in ten (91%) say that at their last sight test/eye examination, information was given to them in a way which they could understand, in line with the previous year. Just 2% were dissatisfied.



Older participants (65+) are more likely to be satisfied compared to younger participants (16-34) (95% vs. 86%).

There are differences by ethnicity as well, with White participants more likely to be content that they understood the information given to them compared to those from an ethnic minority background (92% vs. 88%).

Other groups more likely than average to be satisfied include those who:

- Are of a higher social grade (ABC1) (92%)
- Have no vulnerability markers (93%)
- Had their last sight test/eye examination in the last 6 months (93%)
- Had their last sight test/eye examination at a high street opticians/optometrist practice (92%)
- Had an NHS funded sight test/eye examination (94%)

Q018. Thinking of the last time you had a sight test/eye examination, how satisfied or dissatisfied were you with the following? **Base:** All participants who have had a sight test/eye examination in the last two years (1,676), 2025 participants (1,616). Please note this statement was added in the 2025 survey wave so 2024 data is not available.

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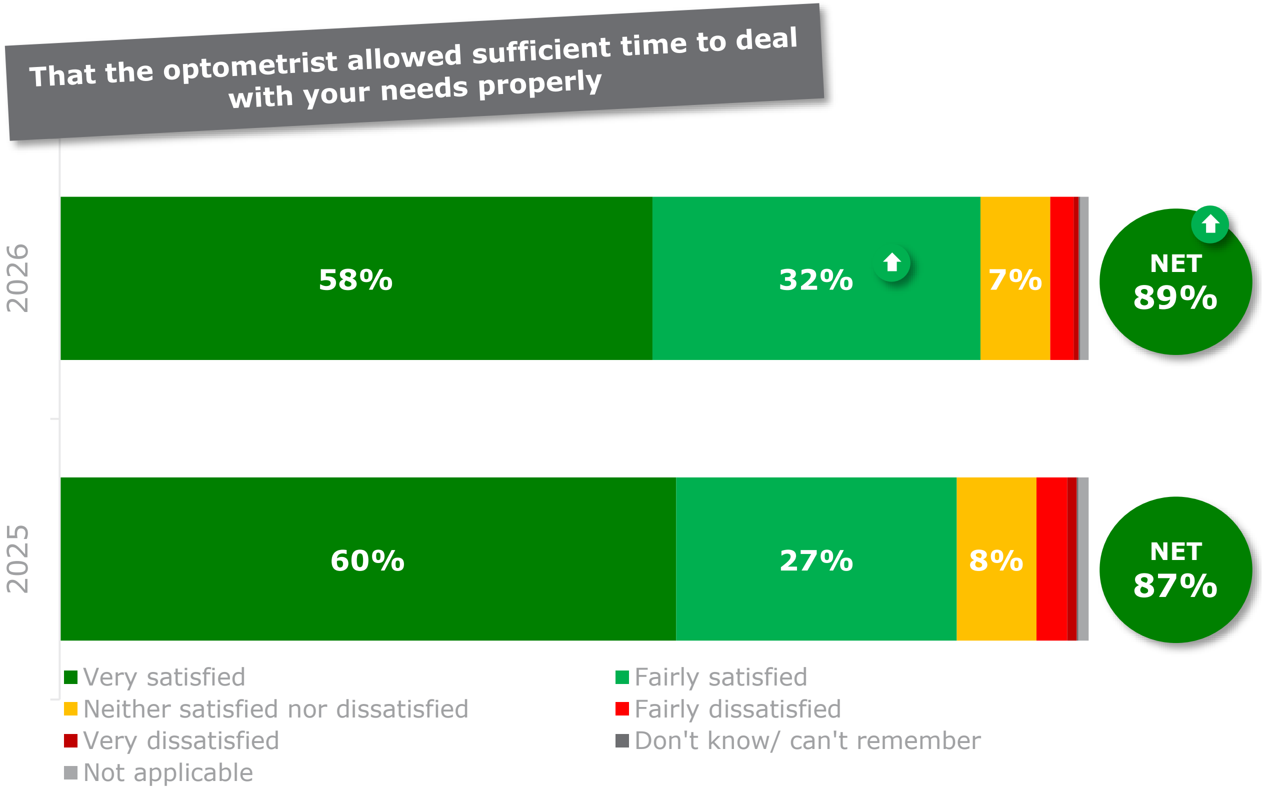
Satisfaction with time given to address needs

Nine in ten (89%) are satisfied that their optometrist allowed sufficient time to deal with their needs properly, which has increased since the previous wave. This is primarily driven by more participants being *fairly satisfied* (32% vs. 27% in 2025). Just 3% are dissatisfied.



Those aged 16-34 are less likely than all other age groups to be satisfied (82% vs. 91% 35-64 and 96% 65 and older).

White participants are more likely than those from an ethnic minority background to be satisfied (91% vs. 84%).

Those not confident in receiving a high standard of care from their opticians/optometrist practice (19%), or managing their own eye health (6%), are more likely than average to be dissatisfied with time given to address their needs.

Those who had their last sight test/eye examination at a high street opticians/optometrist practice are more likely than average to be satisfied (91%), as are those who went in the last 6 months (92%).

Q018. Thinking of the last time you had a sight test/eye examination, how satisfied or dissatisfied were you with the following? **Base:** All participants who have had a sight test/eye examination in the last two years (1,676), 2025 participants (1,616). Please note this statement was added in the 2025 survey wave so 2024 data is not available.

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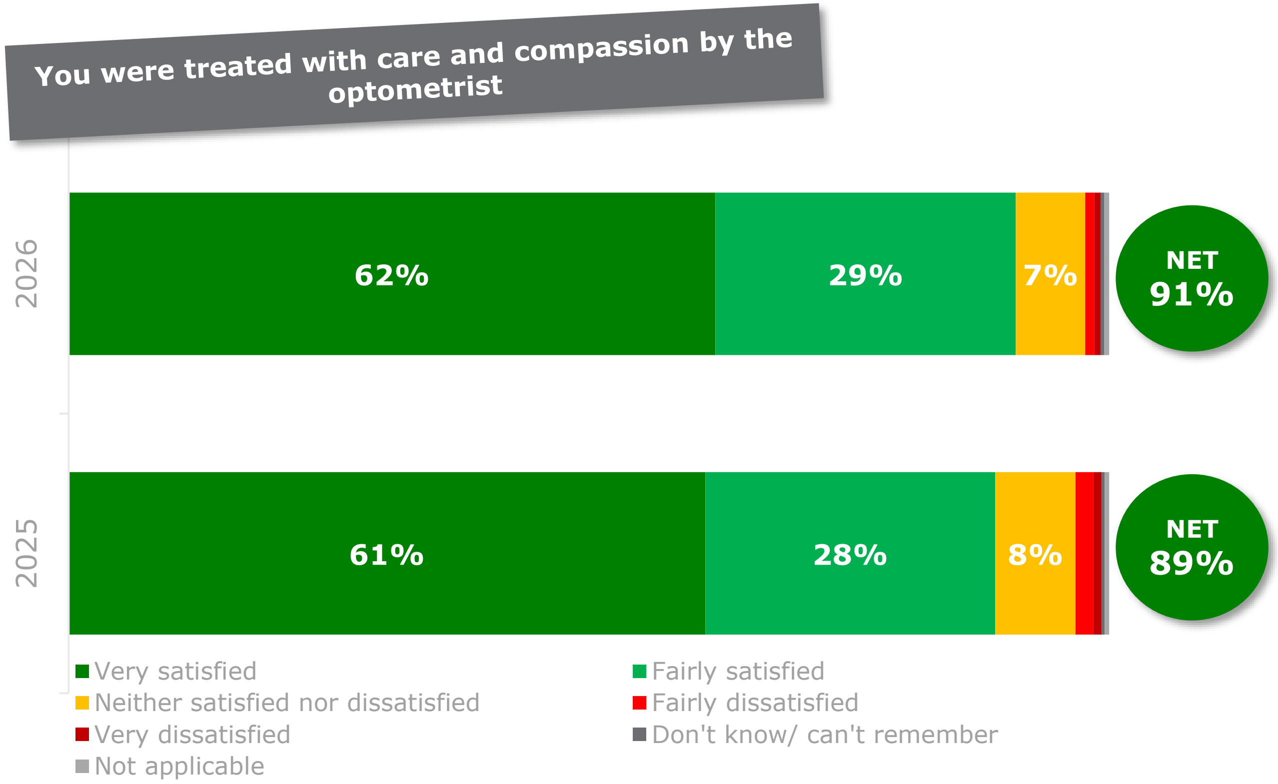
Satisfaction with care and compassion

More than nine in ten (91%) are satisfied that they were treated with care and compassion by their optometrist, which has had a slight but not statistically significant increase this year (vs. 89% in 2025). Just 1% are dissatisfied.



There are few demographic differences, the main being that older participants (65+) are more likely than younger people (16–34) to be satisfied (96% vs. 86%).

Those with at least one vulnerability marker are less likely than average to be satisfied compared to those with none (88% vs. 94%).

Participants that are less confident in receiving a high standard of care from their opticians/optometrist practice or managing their own eye health are more likely than average to be dissatisfied with the levels of care and compassion they received (12% and 6% respectively).

Those who had their sight test/eye examination conducted at a high street opticians/optometrist practice are more likely to be satisfied (92%).

Q018. Thinking of the last time you had a sight test/eye examination, how satisfied or dissatisfied were you with the following? **Base:** All participants who have had a sight test/eye examination in the last two years (1,676), 2025 participants (1,616). Please note this statement was added in the 2025 survey wave so 2024 data is not available.

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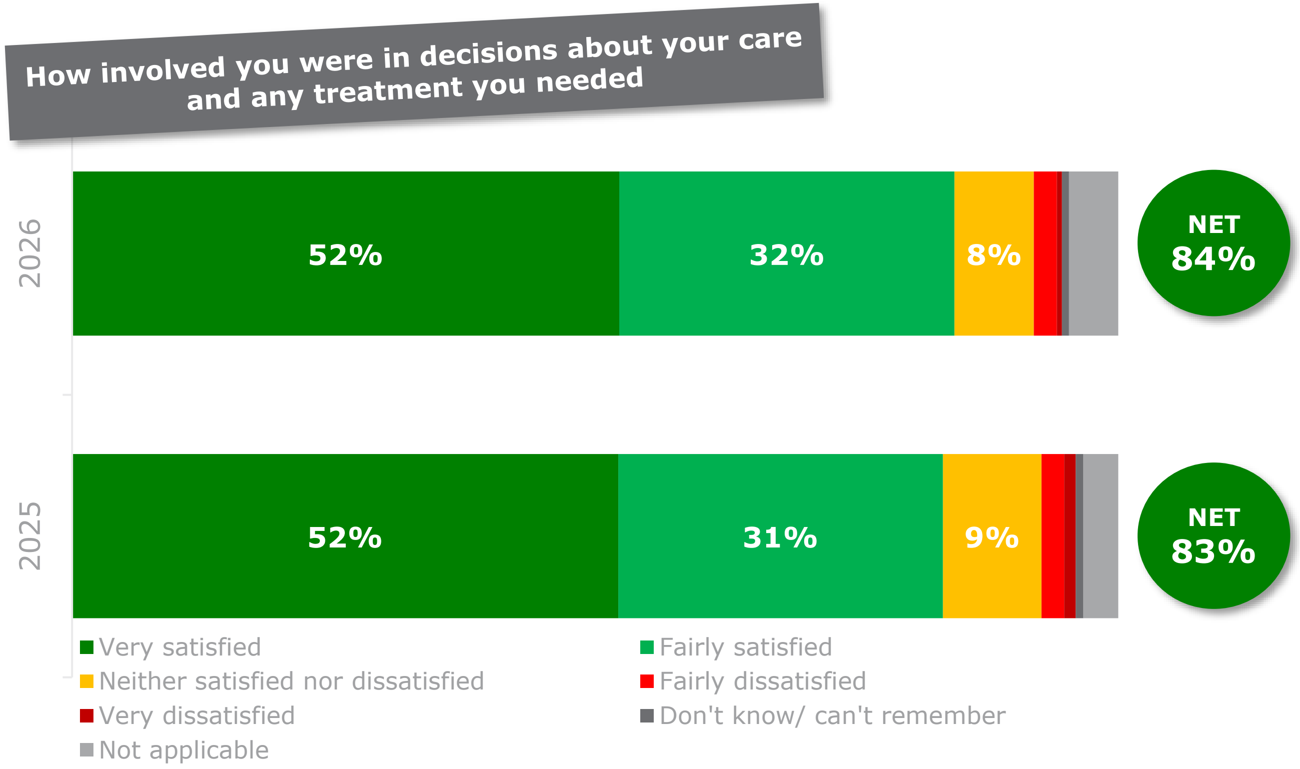
Satisfaction with involvement in care and treatment decisions

The majority (84%) of participants are satisfied with the level of involvement they had in decisions about their care and treatment, which is in line with the previous year. Only 3% are dissatisfied.



In terms of demographic differences:

- Older participants (65+) are more likely than younger people (16-34) to be satisfied (87% vs. 80% 16-34)
- As with previous metrics, ethnic minorities tend to be more dissatisfied (5% vs. only 2% of those from a white background), albeit the majority remain satisfied overall

Participants with at least one vulnerability marker are more likely than average to be dissatisfied (4%), as are those in work (4%), those less confident in receiving a high standard of care from their opticians/optometrist practice (15%), or managing their own eye health (10%).

Participants who had their sight test/eye examination in the last 6 months are more likely than average to be satisfied (89%), as are those with an eye condition (87%).

Q018. Thinking of the last time you had a sight test/eye examination, how satisfied or dissatisfied were you with the following? **Base:** All participants who have had a sight test/eye examination in the last two years (1,676), 2025 participants (1,616). Please note this statement was added in the 2025 survey wave so 2024 data is not available.

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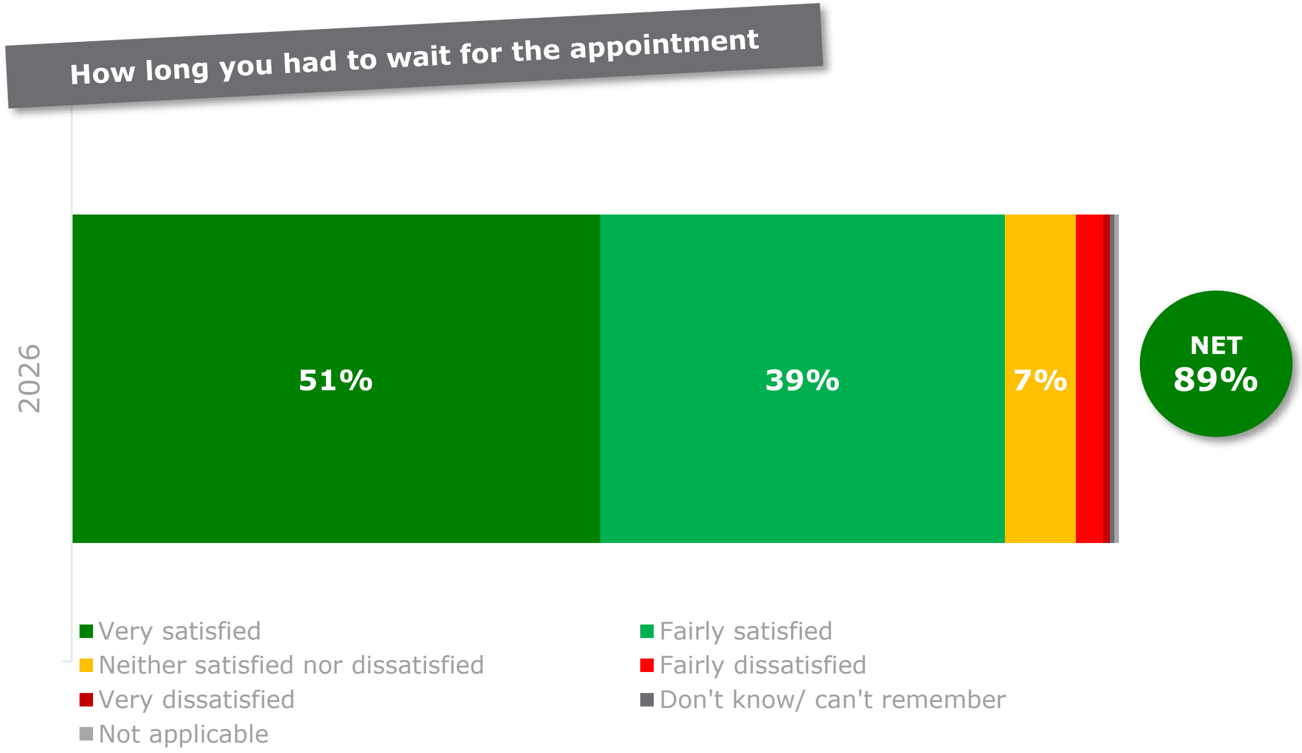
Satisfaction with wait time for the appointment

For the first time participants were asked how satisfied or dissatisfied they were with the length of time they had to wait for their sight test/eye examination appointment, with almost nine in ten (89%) being satisfied. Only 3% say they are dissatisfied.



In terms of demographic differences:

- Older participants (65+) are generally more satisfied than younger people (16-34) (96% vs. 82% 16-34)
- Once again, there are significantly greater satisfaction levels amongst white participants compared to those from an ethnic minority background (92% vs. 80%)

Groups who are more likely than average to be satisfied include those who:

- Are retired (97%)
- Are confident in receiving a high standard of care from their opticians/optometrist practice (91%)
- Are confident in managing their own eye health (90%)
- Wear glasses (91%)
- Had their last sight test/eye examination at a high street opticians/ optometrist practice (91%)
- Had an NHS funded sight test/eye examination (93%)

Groups who are more likely than average to be dissatisfied include those who have at least one vulnerability marker (4%), and those in work (4%), especially those part-time (8%).

Q018. Thinking of the last time you had a sight test/eye examination, how satisfied or dissatisfied were you with the following? **Base:** All participants who have had a sight test/eye examination in the last two years (1,676). Please note this statement was added in the 2026 survey wave so no trend data is not available.

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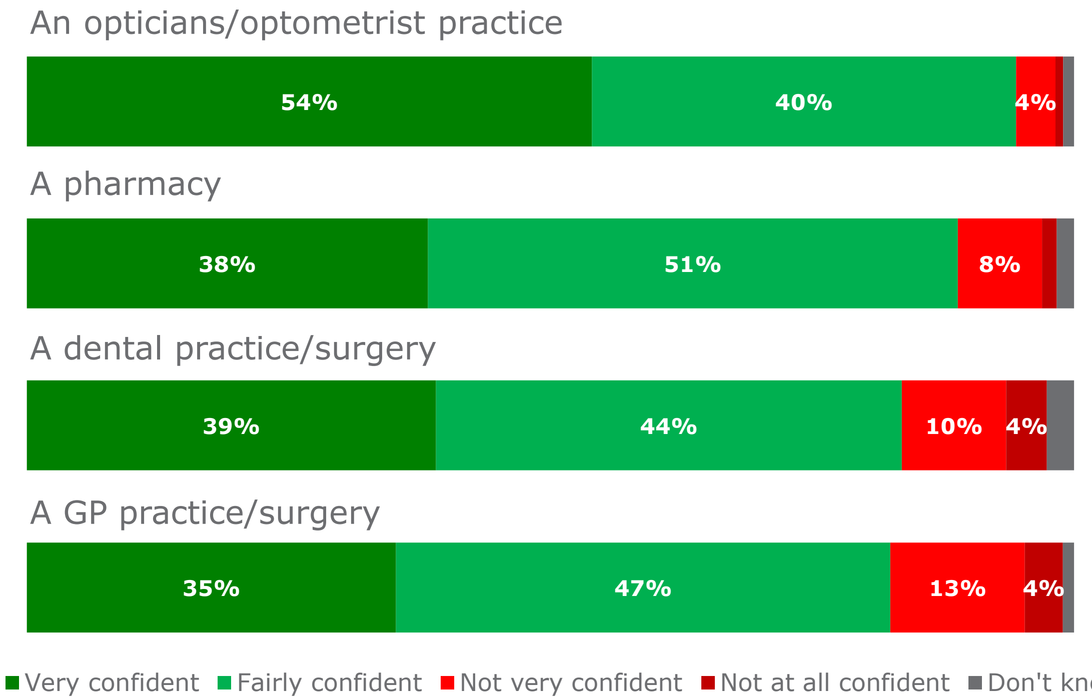
Confidence levels

Confidence in receiving care

Confidence in receiving a high standard of care from an opticians/optometrist practice sees a small but significant increase this year (94% vs. 93% in 2025) and remains ahead of other services in comparison. This is primarily driven by an increase in those saying they are very confident (54% vs. 50% in 2025). All other comparators also see a significant increase.

Confidence in receiving high standard of care



NET: Confident

	2026	2025	2024
An opticians/optometrist practice	94%	93%	92%
A pharmacy	89%	86%	89%
A dental practice/surgery	84%	80%	79%
A GP practice/surgery	82%	78%	79%

Confidence in receiving a high standard of care from an opticians/optometrist practice remains varied by age as young people (16-34) are less likely to be confident than older people (65+) (93% vs. 97%).

Those who speak English as a first language are also more likely than average to be confident (95%).

Those who have at least one vulnerability marker are less likely than average to be confident in receiving a high standard of care from an opticians/optometrist practice (92%), as are those who do not wear glasses or contacts (88%).

Those who had a sight test/eye examination in the last two years (96%) are more likely to be confident than those who haven't (89%). Confidence is particularly low amongst those who have never had one (74%).

Those who had their sight test at a high street optician are more likely than average to be confident (95%). This is also the case for those who have an eye condition (96%).

S01a. To what extent are you confident or not in receiving a high standard of care from each of the following healthcare services? **Base:** All participants (2,014), 2025 participants (2,012), 2024 participants (2,035).

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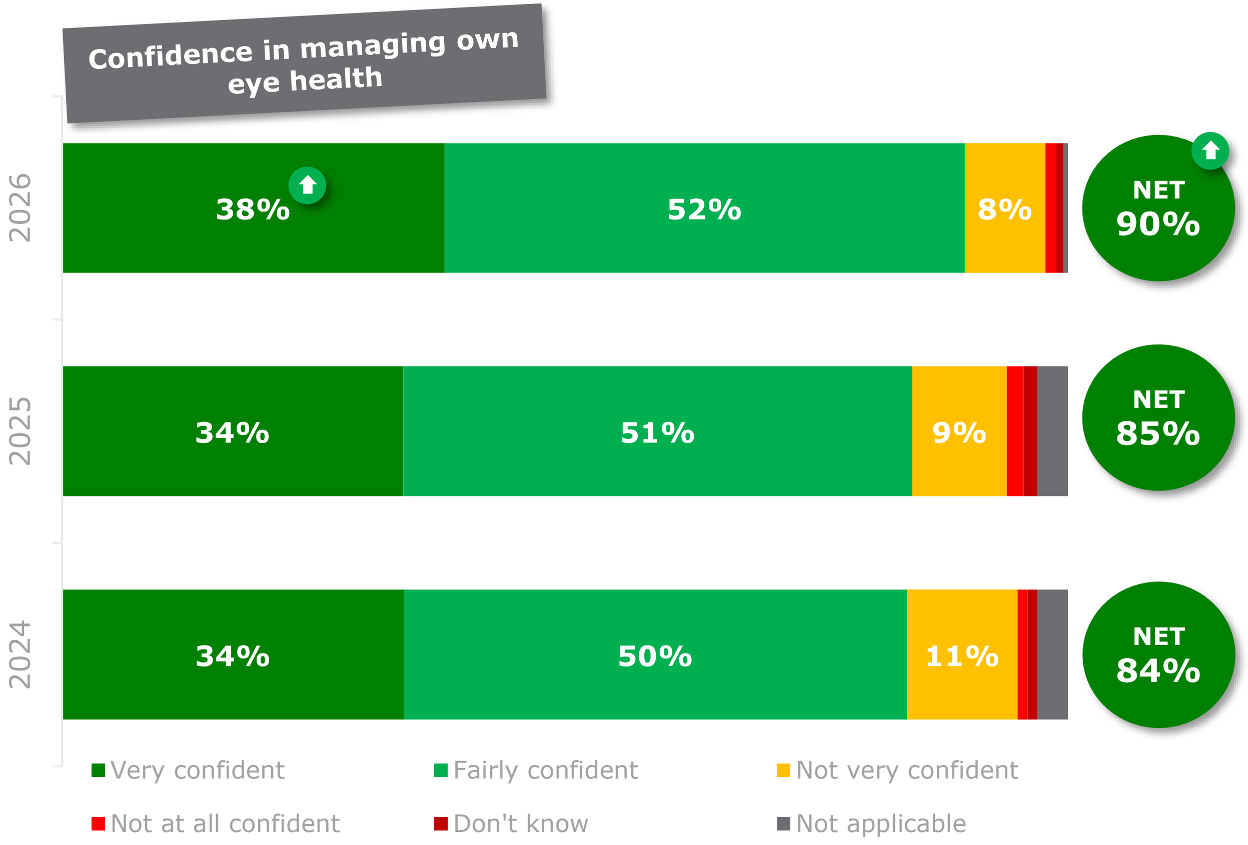
Confidence in managing eye health

The public's confidence in managing their own eye health sees an increase this year (90% vs. 85% in 2025). This is driven by more who say they are very confident (38% vs. 34% in 2025).



Similar to the previous question, confidence in managing their own eye health has differences by age groups – young people (16-34) are less likely than older people (65+) to say they are confident (87% vs. 95%).

Confidence also differs by those who speak English as a first language, as those who do are more confident than those who don't (90% vs. 74% English not first language).

Those who have at least one vulnerability marker are less likely than average to say they are confident in managing their own eye health (82%). Similarly, those who are not confident in receiving a high standard of care from an opticians/optometrist practice are less likely to be confident (54%).

Those who had a sight test/eye examination in the last two years are more likely to be confident than those who had one more than two years ago (93% vs. 75%).

S01b. To what extent are you confident or not in managing your eye health? **Base:** All participants (2,014), 2025 participants (2,012), 2024 participants (2,035).

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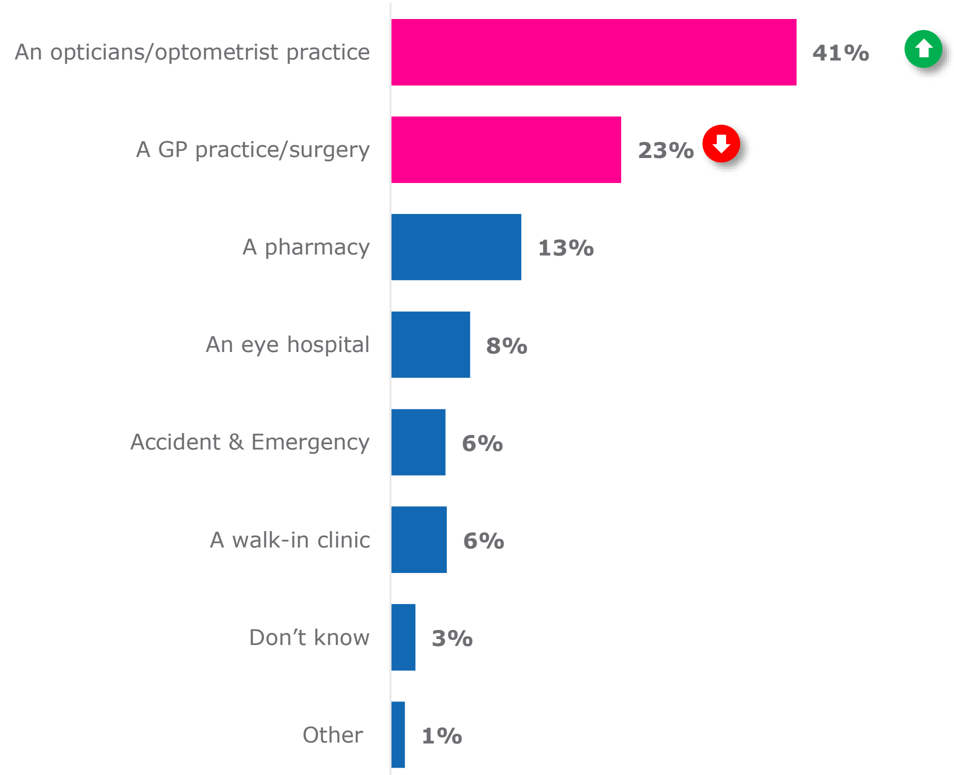
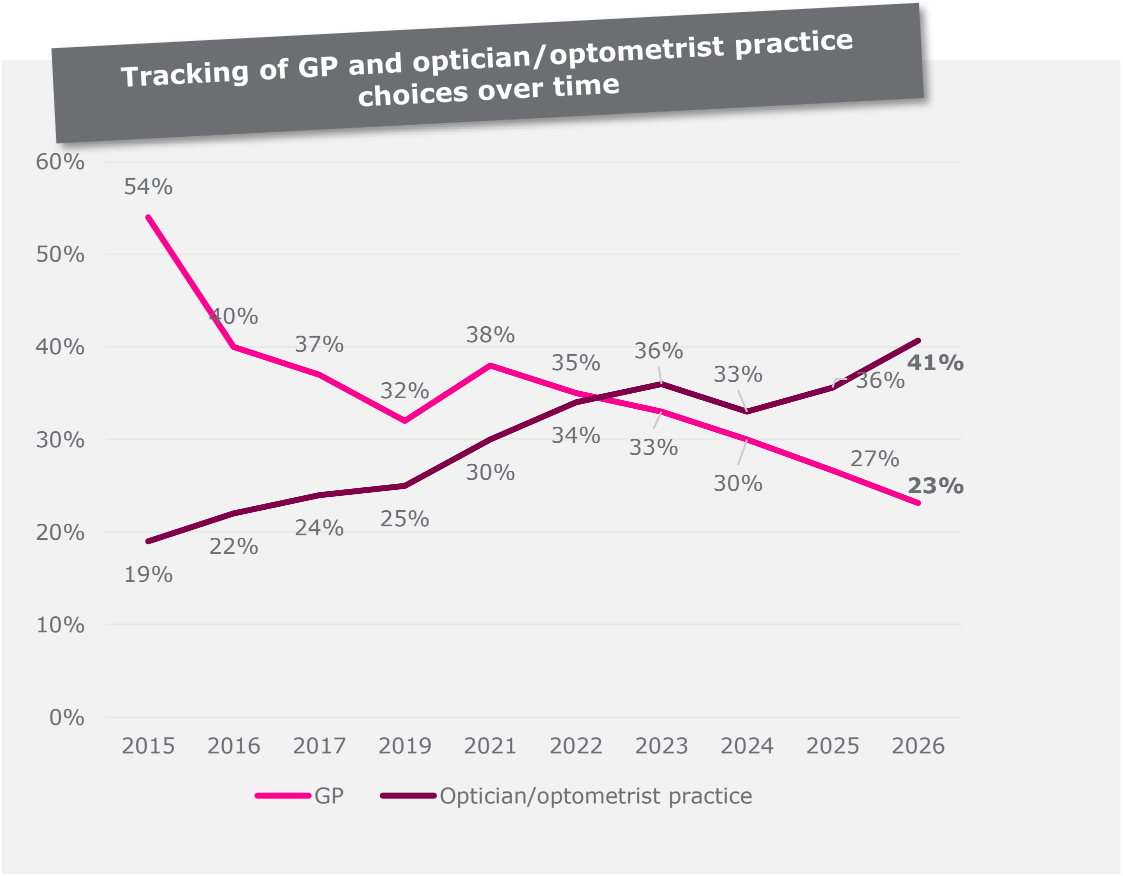
Perceptions of urgent care

First ‘port of call’ for an eye problem

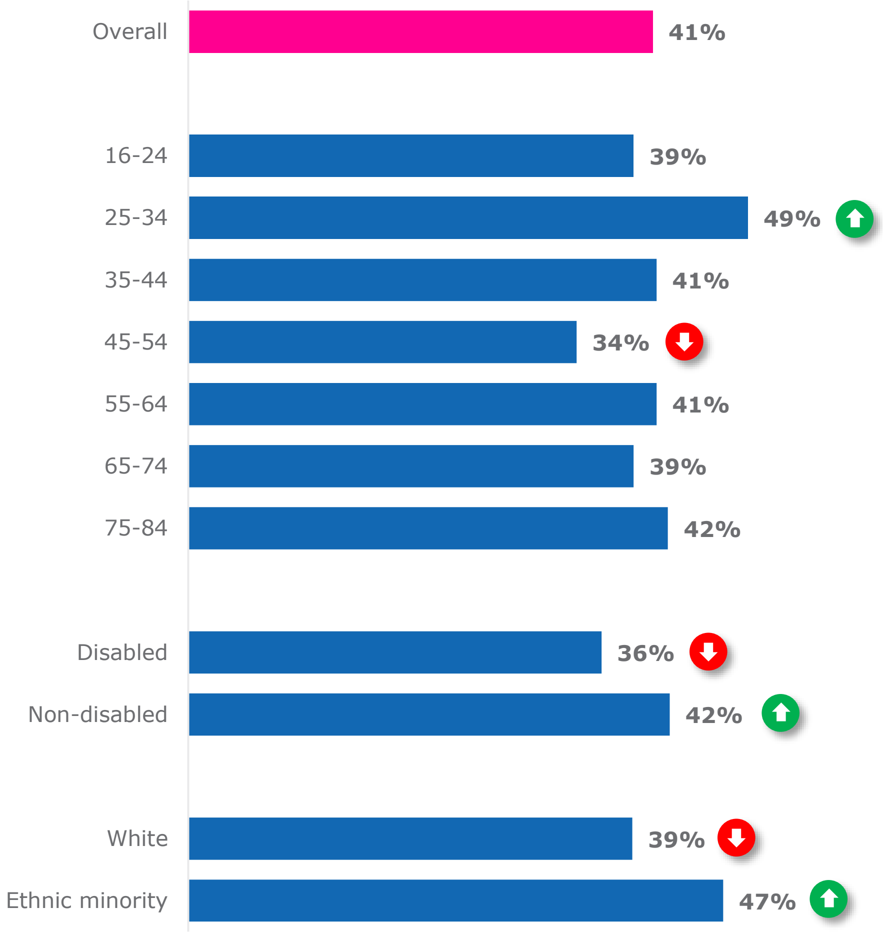
In this wave, a higher proportion say they would first turn to an opticians/optometrist practice in the event of an eye problem (41% vs. 36% 2025). Significantly fewer say they would turn to a GP compared to the previous wave (23% vs. 27% 2025).





Q01. If you woke up tomorrow with an eye problem, such as something in your eye, a red eye or blurred vision, where would you go or who would you speak to first? **Base:** All participants (2,014), 2025 participants (2,012), 2024 participants (2,035).

First 'port of call' for an eye problem cont'd.



Those aged 25–34 are more likely to turn to an opticians/optometrist practice (49%). Those aged 35-44 are more likely than average to say they would go to an eye hospital (12%), while 45–54-year-olds are more inclined to go to a walk-in clinic (10%).

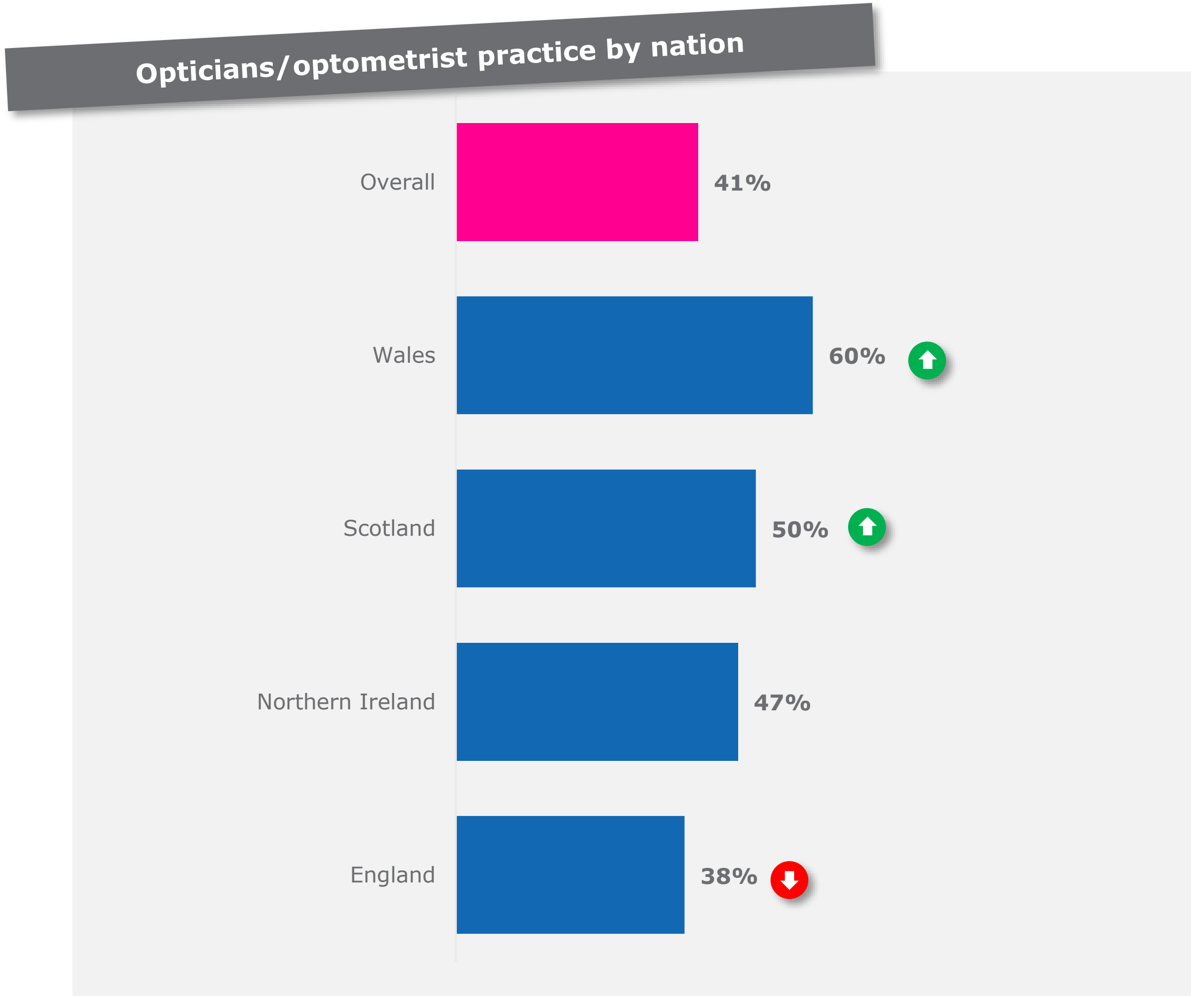
Those from a white background are less likely than ethnic minorities to choose an opticians/optometrist practice (39% vs. 47%). Those with a disability are more likely than average say they would turn to GP practice/surgery as the first port of call (29%).

Those with at least one vulnerability marker are less likely than average to say they would go to an opticians/optometrist practice in the first place for an eye problem (36%). Instead, they are more likely than average to go to a GP practice/surgery (26%) or a pharmacy (15%). Intuitively, those less confident in managing their own eye health (28%) are less likely than average to turn to an opticians/optometrist practice first.

Those who had a sight test/eye examination in the last two years are more likely than those who had one more than two years ago to go to an opticians/optometrist practice first in the event of an eye problem (45% vs 21%). Those who had their sight test/eye examination more than two years ago are more likely to go to a GP practice (38%) or pharmacy (19%).

Q01. If you woke up tomorrow with an eye problem, such as something in your eye, a red eye or blurred vision, where would you go or who would you speak to first? **Base:** All participants (2,014), 2025 participants (2,012), 2024 participants (2,035).

First ‘port of call’ for an eye problem cont’d.



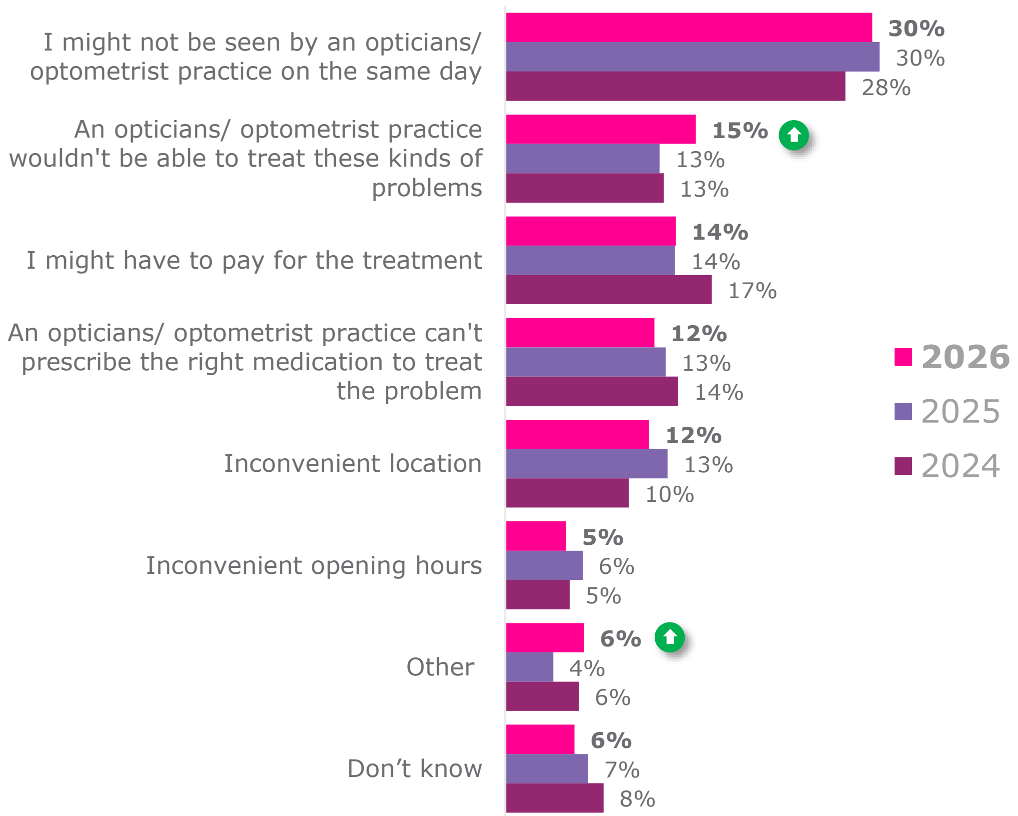
By region, those in England are less likely than those in Wales or Scotland to say they would visit an opticians/optometrist in the first instance (38% vs. 60% and 50% respectively).

Those living in England are more likely than average to say that they would turn to a GP surgery/practice (24%), an eye hospital (9%), or a walk-in clinic (6%) instead.

Q01. If you woke up tomorrow with an eye problem, such as something in your eye, a red eye or blurred vision, where would you go or who would you speak to first? **Base:** All participants (2,014).

Reasons for not choosing an opticians/optometrist practice as first port of call

Among those who did not say they would go to an opticians/optometrist practice first in the event of an eye problem, the worry of not getting a same day appointment remains the most common reason for doing so (30%). More this wave say that an opticians/ optometrist practice wouldn't be able to treat the kinds of problems they have as a reason (15% vs. 13% 2025).



Women are more likely than men to mention not being seen on the same day as a barrier to seeing an opticians/optometrist practice (33% vs. 27%). Paying for treatment (19% vs. 9%) and inconvenient opening hours (9% vs. 1%) are bigger barriers for young people (16-34) compared to those aged 65 and older.

Those from lower social grades (C2DE) are more likely to mention paying for treatment as a barrier (18% vs. 12% of ABC1s). The same can be found for those with at least one vulnerability marker (16%), and those not confident in receiving a high standard of care from an opticians/optometrist practice (24%).

Those in work are more likely than average to mention inconvenient opening hours as a barrier (6%), whereas those not in work are more likely than average to mention the possibility of not being seen same day (39%).

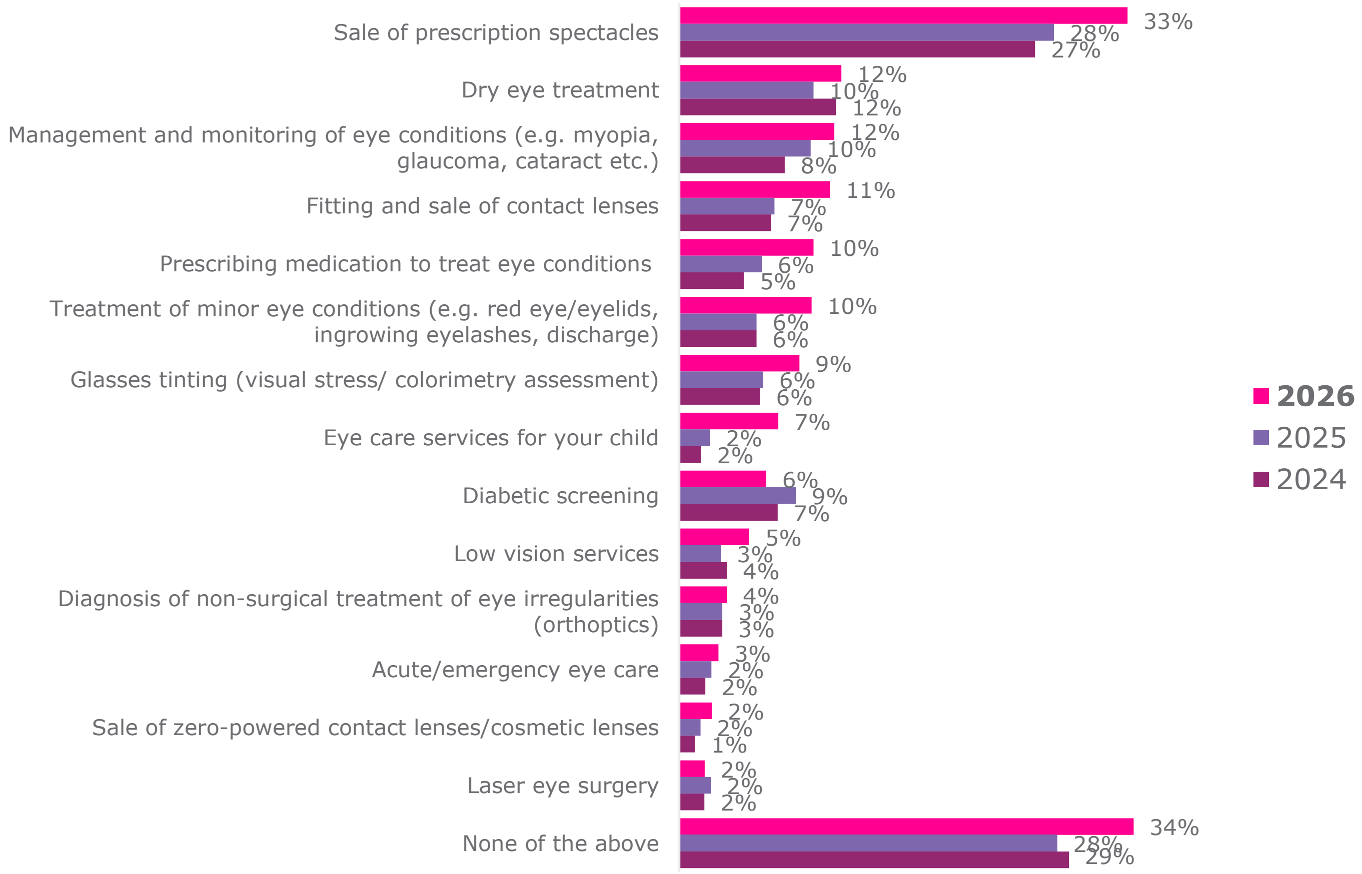
Those who last had a sight test/eye examination more than two years ago are more likely to cite potential payment for treatment as a reason not to choose an opticians/optometrist practice first (20%). Those who have had a sight test/eye examination in the last two years are more likely than average to mention not being seen on the same day (31%).

Q02. Why would you choose not to go to an opticians/optometrist practice first in this situation? **Base:** All participants not choosing to visit an opticians/optometrist practice (1,131), 2025 (1,225), 2024 (1,309).

Use of optical services

Use of optical services*

Participants were asked if they had used any of the listed optical services in the past two years. Sale of prescription spectacles is the most popular service (33%), followed by dry eye treatment (12%), and management and monitoring of eye conditions (12%). Over a third (34%) say they have used none of the listed services in the past two years.



Those aged 65 and older are more likely than average to say they have bought spectacles (45%), had an eye condition managed/monitored (16%), undergone diabetic screening (12%) and/or had laser eye surgery (3% vs. 2% overall). In contrast, those aged 16-24 are more likely than average to have had fitting and sale of contact lenses (15%) and/or bought zero-powered contact lenses/cosmetic lenses (5% vs. 2% overall). Two in five young people (16-24) have not used any of the services (41%).

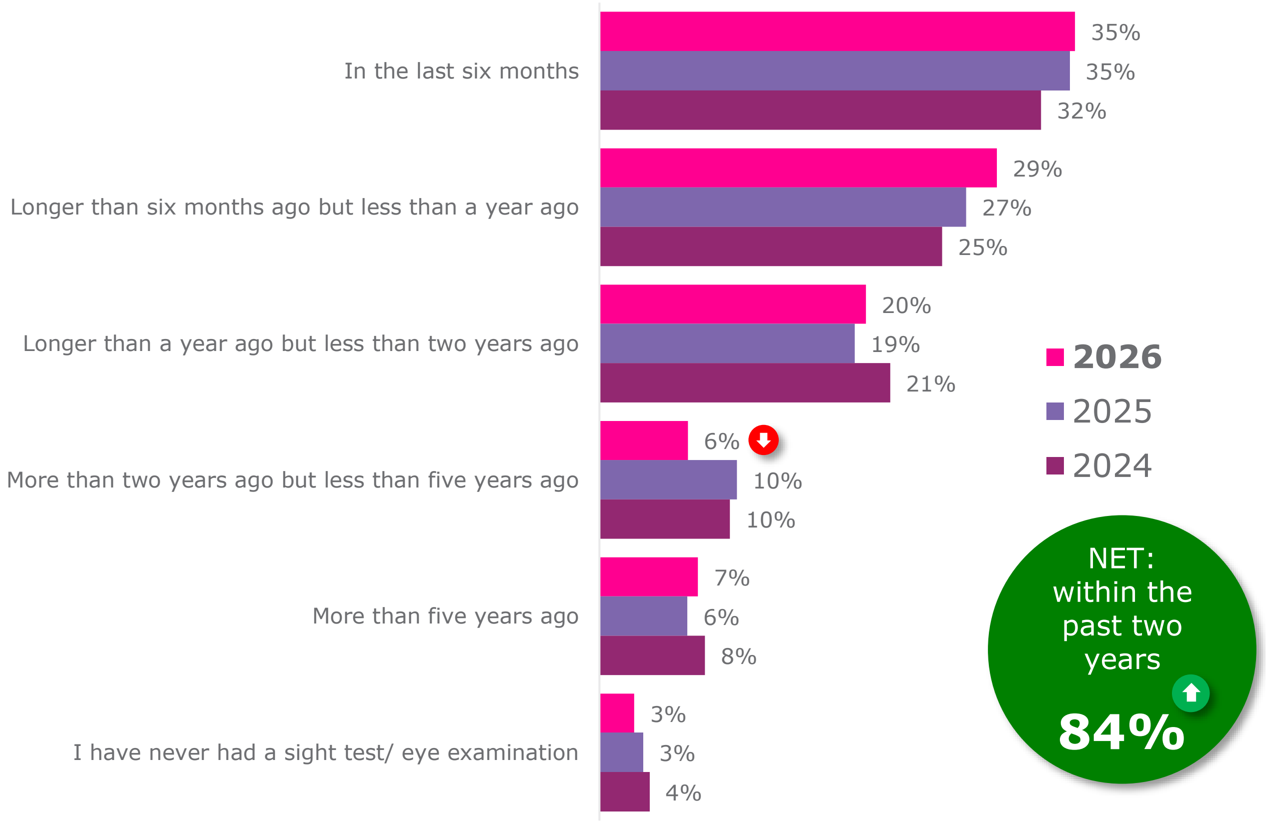
Those who are less confident in managing their eye health are more likely to say they have used none of the different services (46%), as are those with low incomes of under £20,000 (46%), C2DEs (41%), and those not in work (51%).

Q04d. In the last 2 years, have you used any of the following services? **Base:** All participants (2,014), 2025 (2,012), 2024 (2,035).

* This wave of the survey sees the option of sight testing/eye examinations and domiciliary services removed as potential options for participants to select. Other codes have also been amended. Therefore, comparisons to previous waves of the survey are only indicative and statistical significance compared to the previous wave has been omitted.

Last reported visit for sight test/eye examination

More participants say they have had a sight test/eye examination in the past two years compared to last year (84% vs. 80% 2025). In this wave fewer say they had a sight test/eye examination more than two years ago (14% vs. 17% 2025). Just 3% say that they have never had one.



Those aged 65 and older are more likely than average to have had a sight test/eye examination in the last two years (90%).

Unsurprisingly, those who wear glasses (92%) or contact lenses (97%) are more likely than average to have had a sight test/eye examination in the past two years compared to those who do not wear any (46%). Those with an existing eye condition are also more likely than average to have had their sight test/eye examination in the past two years (95%).

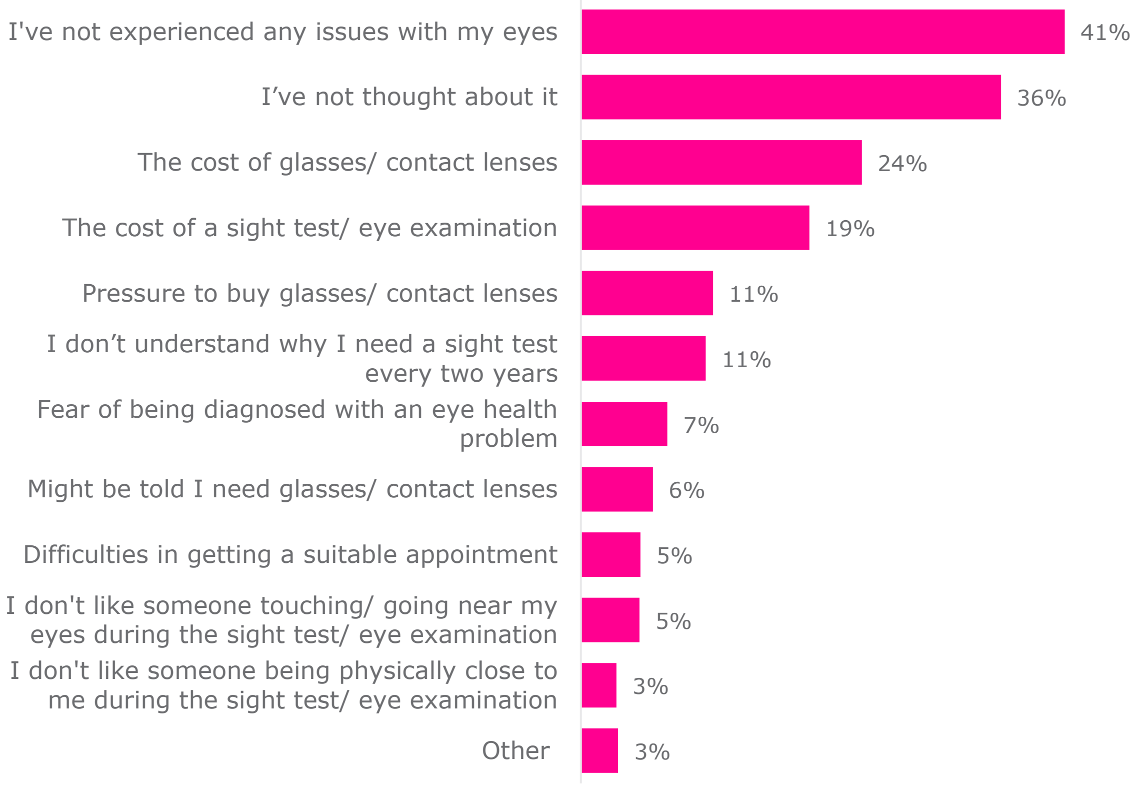
Those with no vulnerability markers (89%) are more likely than those with at least one marker (79%) to have had a sight test/eye examination in the past two years. Those with four or more vulnerability markers are more likely to say their last eye test was over five years ago (14%).

Those who have low confidence in managing their eye health are more likely to say their last sight test/eye examination was two or more years ago (33%), or never (8%).

Q04a. When was the last time you had a sight test/eye examination? **Base:** All participants (2,014), 2025 (2,012), 2024 participants (2,035).

Reasons for not having a sight test / eye examination in the last two years

Participants who have not been for a sight test/eye examination in the last two years were asked why. The most common reason is not experiencing any issues with their eyes (41%), which suggests that routine check ups are not common behaviour for some. Just over a third (36%) say they haven’t thought about it, followed by reasons around cost (24% cost of glasses/contacts; 19% cost of a sight test/eye examination).



Those aged 16-34 are more likely than average to say they have not thought about having a sight test/eye examination (43%), whereas 35–64-year-olds are more likely to cite the perceived cost of glasses/contact lenses (31%) as a reason to not go for a test/examination.

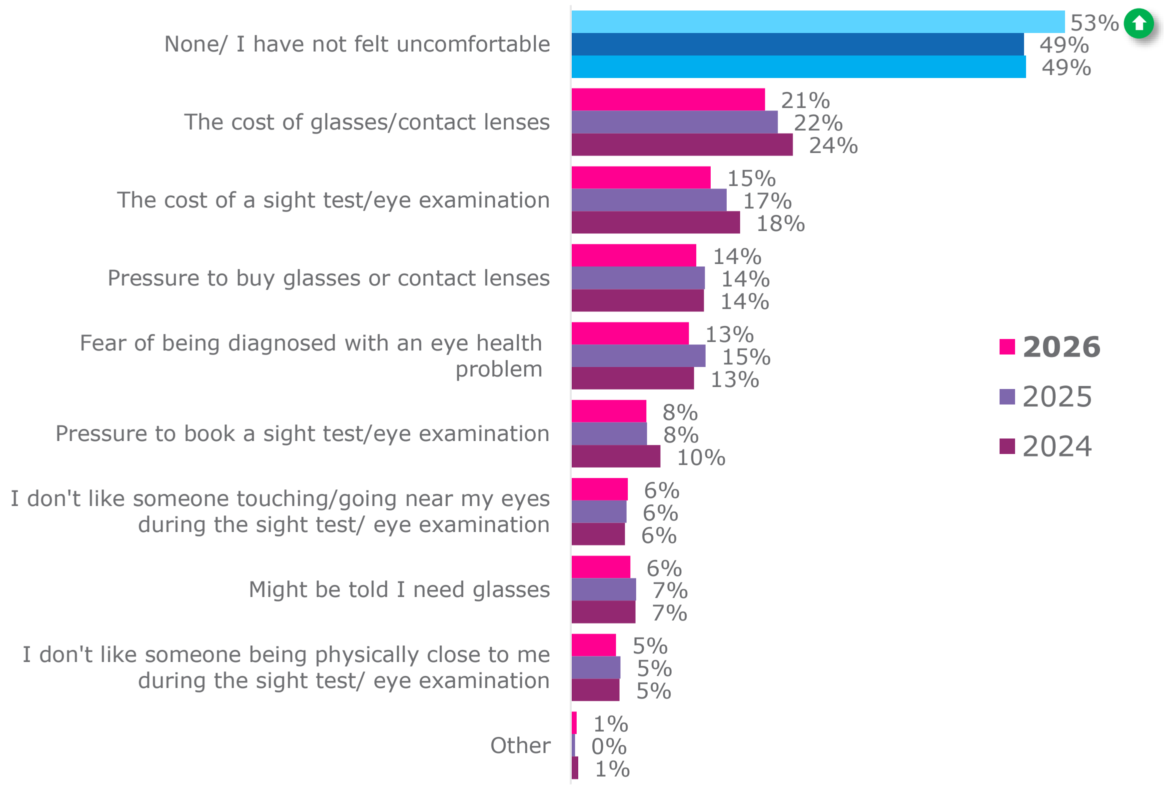
Those with at least one vulnerability marker are more likely than average to cite the cost of the sight test/eye examination (23%). Those struggling financially are more likely to cite both the cost of glasses/contact lenses (31%) and of a sight test/eye examination (26%).

Sub-group analysis is limited due to small base sizes.

Q04AI. Why have you not been for a sight test / eye examination in the last two years? **Base:** All respondents who have not had a sight test in the last two years (338).

Discomfort around visiting an opticians/optometrist practice

Consistent with previous waves, the most common reasons for discomfort around visiting an opticians/optometrist practice continue to be about money. The cost of glasses continues to be the most common reason (21%), followed by the cost of a sight test/eye examination (15%). More this wave say they have not felt uncomfortable about visiting an opticians/optometrist practice (53% vs. 49% in 2025).



Those more likely to mention the cost of glasses or contact lenses as a reason for feeling uncomfortable about visiting an opticians/optometrist practice include:

- Females (23%)
- Those from an Asian background (31%)
- Those with at least one vulnerability marker (24%), especially those with four or more (40%)
- Those who say they cannot afford essentials (30%), and
- Those who are struggling financially (28%)

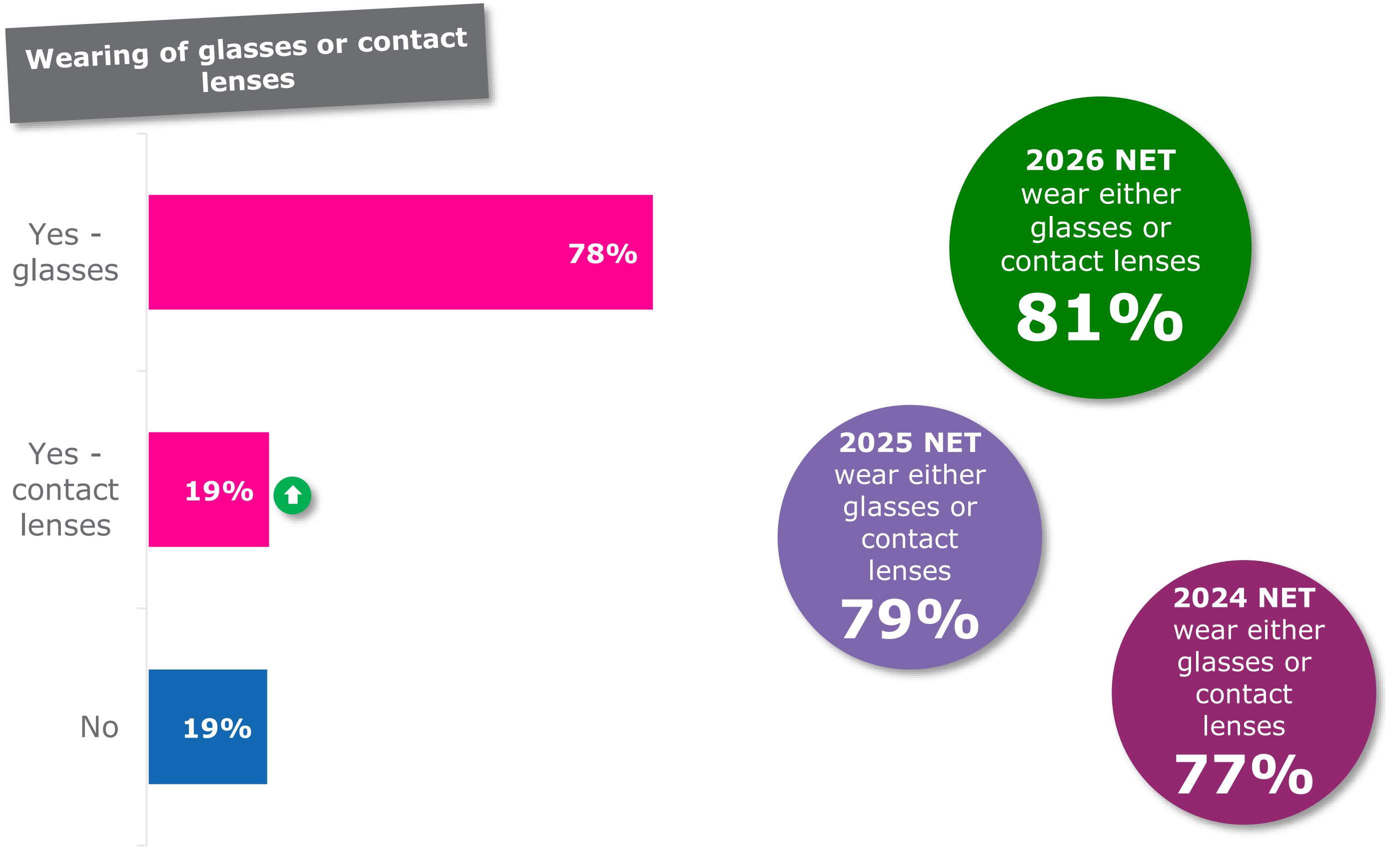
Those aged 16-34 are more likely than average to mention almost all reasons, except pressure to buy glasses or contact lenses. Those aged 65 and older are more likely than all other age groups to say they have not felt uncomfortable (77%), especially those aged 75-84 (83%).

White participants are more likely than ethnic minorities to say that they have not felt uncomfortable (58% vs. 39%). Ethnic minority participants are more likely to mention most of the reasons listed, although they are in line with the overall data when it comes to the cost of glasses/contact lenses and someone touching their eyes or being physically close during a sight test/eye examination.

Q03. Have you ever felt uncomfortable about visiting an opticians/optometrist practice for any of the following reasons? **Base:** All participants (2,014), 2025 (2,012), 2024 participants (2,035).

Wearing glasses or contact lenses

Just over four in five (81%) say that they wear glasses, contact lenses, or both. Just under four in five (78%) say they wear glasses. This year, more say they wear contact lenses (19% vs. 14% 2025). Just under one in five (19%) say they do not wear glasses or contact lenses.



Those aged 55 and over are more likely than average to wear either glasses or contact lenses (91%). Those aged 25-44 are more likely to wear contact lenses (30%), although they are also more likely to say they wear neither glasses nor contact lenses (24%). Those aged 16-24 are also more likely to say they wear neither (33%).

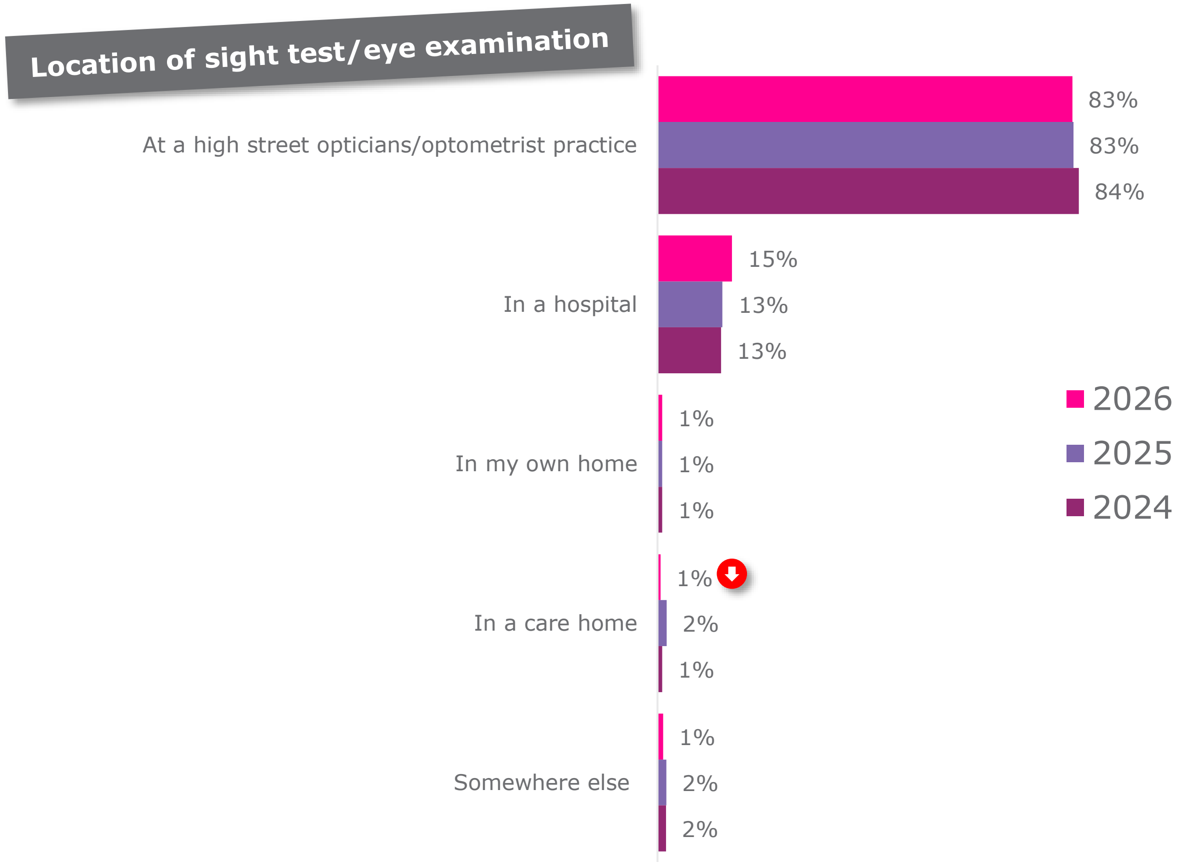
Females are more likely than males to say they wear contact lenses (21% vs. 17%). The same can be found for ethnic minorities compared to those from a white background (29% vs. 16%).

Those who has their last sight test/eye examination more than two years ago (57%), have at least one vulnerability marker (21%), are not confident in managing in receiving care from an opticians/optometrist (31%), and those not confident in managing their own eye health (34%) are more likely to wear neither glasses nor contact lenses.

S01c. Do you wear glasses or contact lenses? **Base:** All participants (2,014), 2025 (2,012), 2024 participants (2,035).

Location of test

Consistent with the previous waves, 83% of those who have had a sight test/eye examination did so at a high street opticians/optometrist practice.



Women are more likely than men to have had their sight test/eye examination at a high street opticians/optometrist practice (85% vs. 80%) whereas men are more likely than women to say their sight test/eye examination took place in a hospital (17% vs. 13%).

Those aged 45-74 are all more likely than average to say their sight test/eye examination took place at a high street opticians/optometrist practice (93%). In contrast, those aged 16-34 are less likely than average to say their sight test/eye examination took place at a high street opticians/optometrist practice (66%), but rather at an hospital (30%).

Those who live in Wales are more likely than average to say their test was at a high street opticians/optometrist practice (91%). Those in England are more likely to say it took place in a hospital (16%).

Participants with an existing eye condition are more likely to have had their last sight test/eye examination at a hospital (26%), whereas those without a condition are more likely to do so at a high street opticians/optometrist (89%).

Those with an NHS funded sight test/eye examination are more likely to have done theirs at a high street opticians/optometrist practice (87%).

Q04b. Thinking of the last time you had a sight test/eye examination, where was this? **Base:** All participants who have had a sight test/eye examination (1,958), 2025 participants (1,953), 2024 participants (1,963).

Choosing the opticians/optometrist practice

One third (33%) say that they shopped around before picking which opticians/optometrist practice to visit. Just under seven in ten (67%) did not shop around.

2026

33%

2025

31%

…shopped around

2024

31%

…shopped around

… shopped around before picking which opticians/ optometrist practice to go to…

Those more likely than average to say they shopped around before selecting an optician/optometrist include those:

- Aged 16-44 (49%)
- From an ethnic minority background (53%)
- From ABC1 social grades (34%)
- With household income of more than £50,001 (36%)
- In work (40%)
- Who are not confident in receiving a high standard of care from an opticians/optometrist (45%)
- Who paid themselves for their last sight test/eye examination (39%)
- Who knew the price before their sight test/eye examination (36%)
- Who spend £501 or more on their eye care (60%).

Those more likely to say they did not shop around include those:

- Aged 55 and older (83%)
- From a white background (73%)
- From Wales (79%) or Northern Ireland (81%)
- With a disability (72%)
- With less than £20,000 household income (75%)
- Not in work (74%)
- Who did not know the price before their sight test/eye examination (72%)
- Who had an NHS funded sight test/eye examination (78%).

Q05. Did you shop around (i.e., compare different opticians/ optometrist practices) before picking which one to go to? **Base:** All participants who have had an eye sight test/eye examination in the past two years (1,676), 2025 participants (1,616), 2024 participants (1,599).

Knowledge of prices before attending appointment

More than three in five (64%) say that they knew the price of the sight test/eye examination before their appointment, in line with the previous waves. Less than two in five (36%) say they did not.

2026

64%

… knew the price of the sight test/eye examination before they attended their appointment

2025

65%

…knew the price

2024

63%

…knew the price

Those aged 65 and over are more likely than average to say they knew the price before their sight test/eye examination (76%). In contrast, those aged 16-34 are more likely to say they did not (43%).

Those in full time work (39%), full time education (55%), and those who do not wear glasses or contact lenses (53%) are more likely to say they did not know the price of the sight test/eye examination.

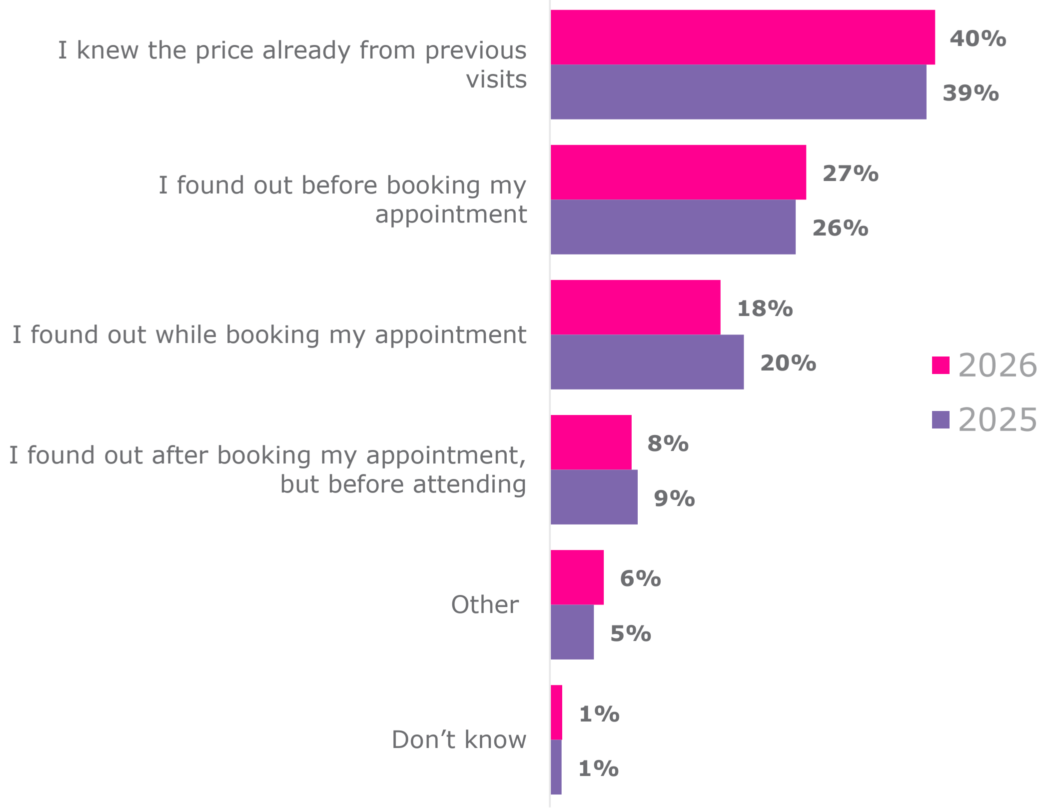
As expected, those who say that they shopped around before their appointment are more likely to say that they knew the price compared with those who did not (70% vs 61% respectively).

Interestingly, those who said they paid for their own sight test/eye examination are more likely than average to say they did not know the price (41%).

Q07. Did you know the price of the sight test/eye examination before you attended your appointment? **Base:** All participants who have had a sight test/eye examination in the past two years (1,676), 2025 participants (1,616), 2024 participants (1,599).

Source of price information

There are no changes this wave when it comes to how participants first found out about the price of their sight test/eye examination. All sources remain in line with the previous wave - 40% say that they knew this from previous visits, 27% before booking their appointment, 18% while booking the appointment, and 8% after booking their appointment but before attending.



Those aged 16-34 are more likely than average to say they either found out before booking their appointment (33%), while booking their appointment (24%), or after booking their appointment but before attending (18%). In contrast, those aged 65 and older are more likely to know the price from previous visits (60%).

Those not confident in receiving a high standard of care from an opticians/optometrist practice are more likely to have found out after booking their appointment, but before attending (18%).

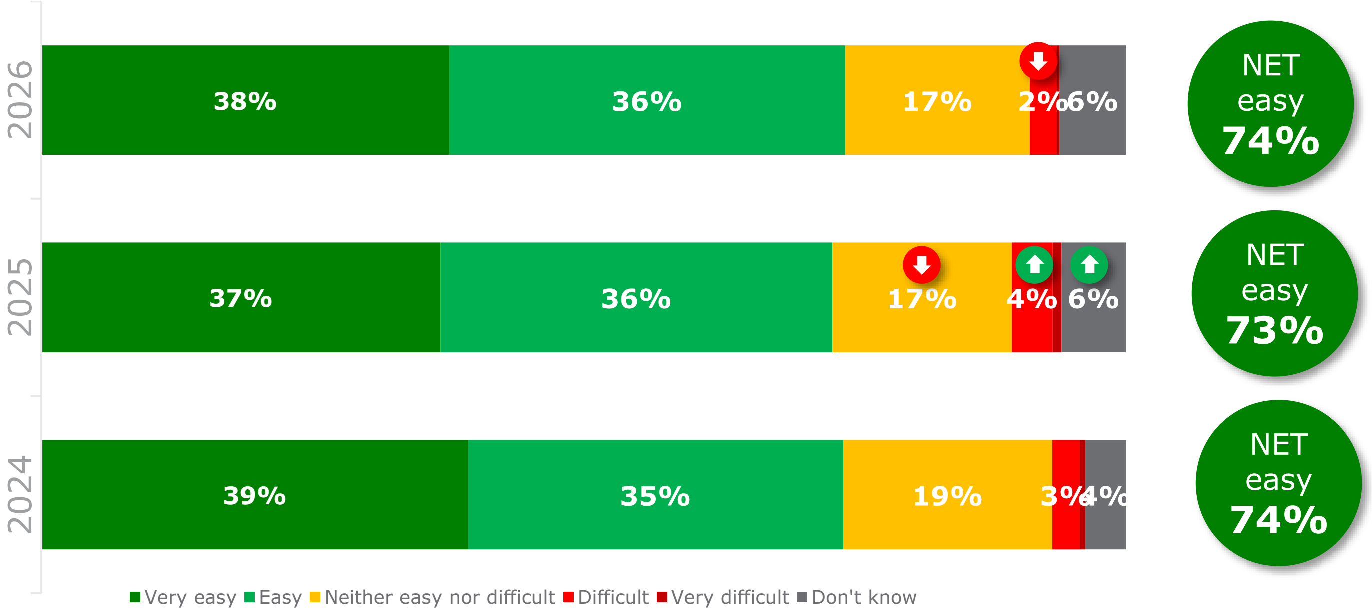
Those who shopped around are more likely to have found out the price before booking their appointment (35%) or after booking their appointment but before attending (13%). Those who did not shop around are more likely than average to know the price from previous visits (47%).

Those who paid for their last sight test/eye examination are more likely than average to have either found out the price before booking their appointment (31%), while booking their appointment (24%), or after booking their appointment but before attending (13%). Those whose employers paid are more likely to have found out while booking their appointment (32%), while those with NHS funding are more likely to know the price from previous visits (53%).

Q08. How did you first find out what the price of the sight test/eye examination would be? **Base:** All respondents who knew the price of the sight test/ eye examination before they attended their appointment (1,068), 2025 participants (1,041).

Ease of sourcing price information

In line with previous years, 74% say they found sourcing the price of their sight test/eye examination easy. There are fewer this year who found getting the price was difficult (3% vs. 5% 2025).



Those aged 65 or over are more likely to say they found it very easy (60%) to find out the price of their last test/examination, whereas those aged 16-34 are more likely to say they found it difficult (4%).

Those who are confident in receiving care from an opticians/optometrist practice (75%) and confident in managing their eye care (76%) are more likely than average to have found it easy to find out the price.

Those who had their last sight test/eye examination at a high street optician/optometrist practice are more likely to say they found it very easy to find out the price (40%).

Q09. Overall, how easy, or difficult was it to find out the price of your last sight test/eye examination? **Base:** All participants who have had a sight test/eye examination in the last two years (1,958), 2025 participants (1,953), 2024 participants (1,599).

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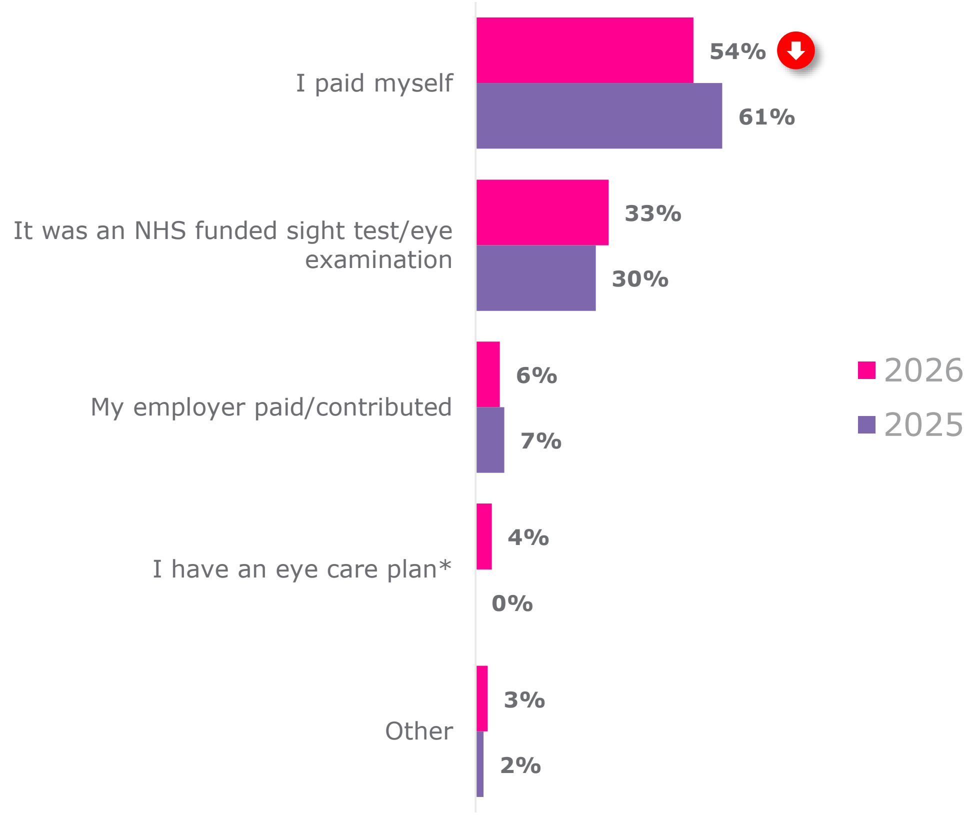
Source of sight test/eye examination funding

This year, fewer participants say their last sight test/eye examination was paid for by themselves (54% vs. 61% 2025), and one third say it was funded by the NHS (33%). Relatively few (6%) still say their employer paid or contributed towards their sight test/eye examination. New to this wave, 4% say their sight test/eye examination was covered under their eye care plan.



Those aged 16-54 are more likely than average to have paid themselves (68%), whereas those aged 65 and older are more likely to have had their sight test/eye examination funded by the NHS (67%).

By region, those in England are more likely than average to have paid themselves (56%).

Those with a disability are more likely than average to say their sight test/eye examination was funded by the NHS (49%). The same can be found for those with at least one vulnerability marker (38%).

Those who last had their sight test/eye examination at a high street optician/optometrist practice are more likely than average to say it was funded by the NHS (34%), whereas those who paid themselves are more likely to have had their last sight test/eye examination at a hospital (64%).

Intuitively, those in work are more likely than average to say they either paid themselves (68%) or their employer paid or contributed (9%).

Those who shopped around are more likely than average to have paid themselves (65%), whereas those who did not shop around are more likely to have received NHS funding (38%).

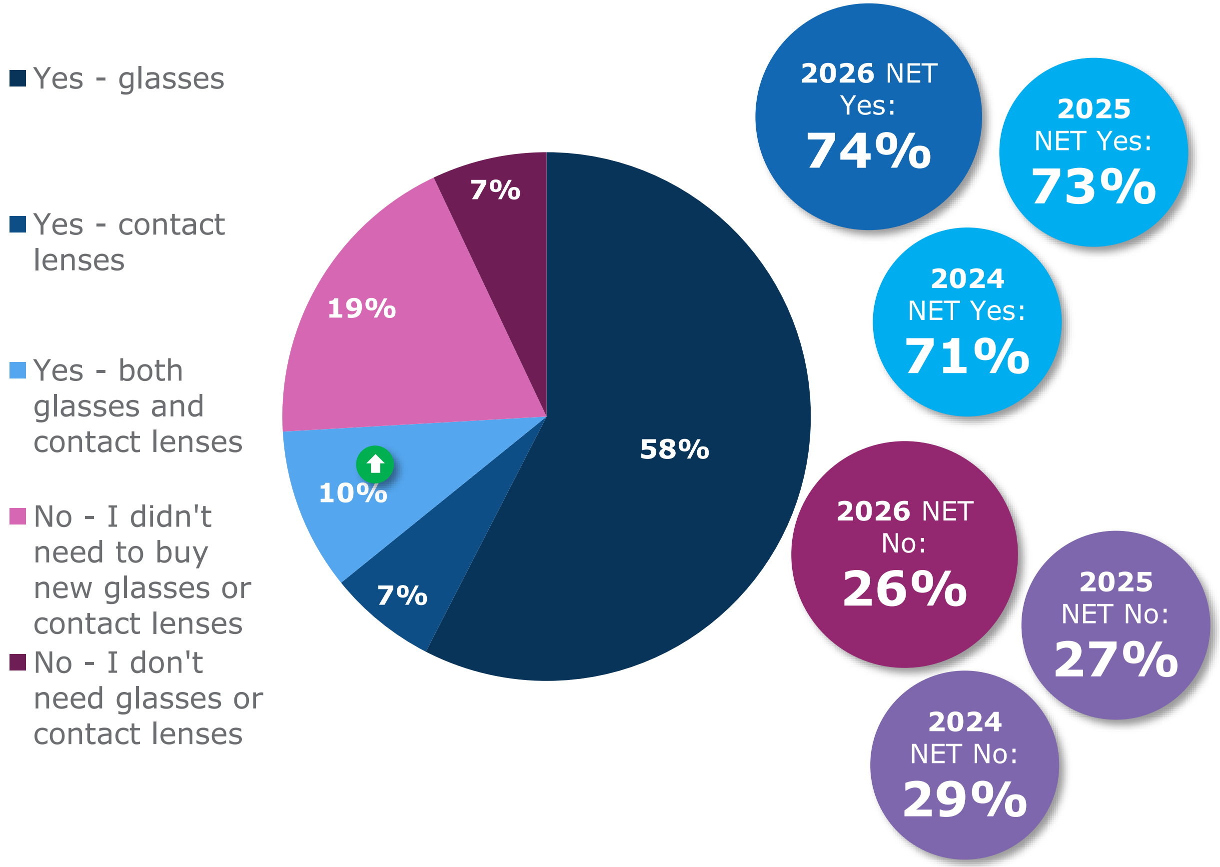
C00. How was your last sight test paid for? **Base:** All participants who have had a sight test/eye examination in the past two years (1,676), 2025 participants (1,616).

* New code added this wave

Purchasing eyewear

Purchase of glasses or contact lenses

Almost three quarters (74%) purchased glasses or contact lenses following their sight test/eye examination. The largest proportion (58%) bought glasses only, but 7% bought contact lenses only. The proportion who bought both glasses and contact lenses has increased significantly since 2025 (10% vs. 6%). Just under one in five (19%) did not need to purchase new glasses or contact lenses.



In terms of demographic differences:

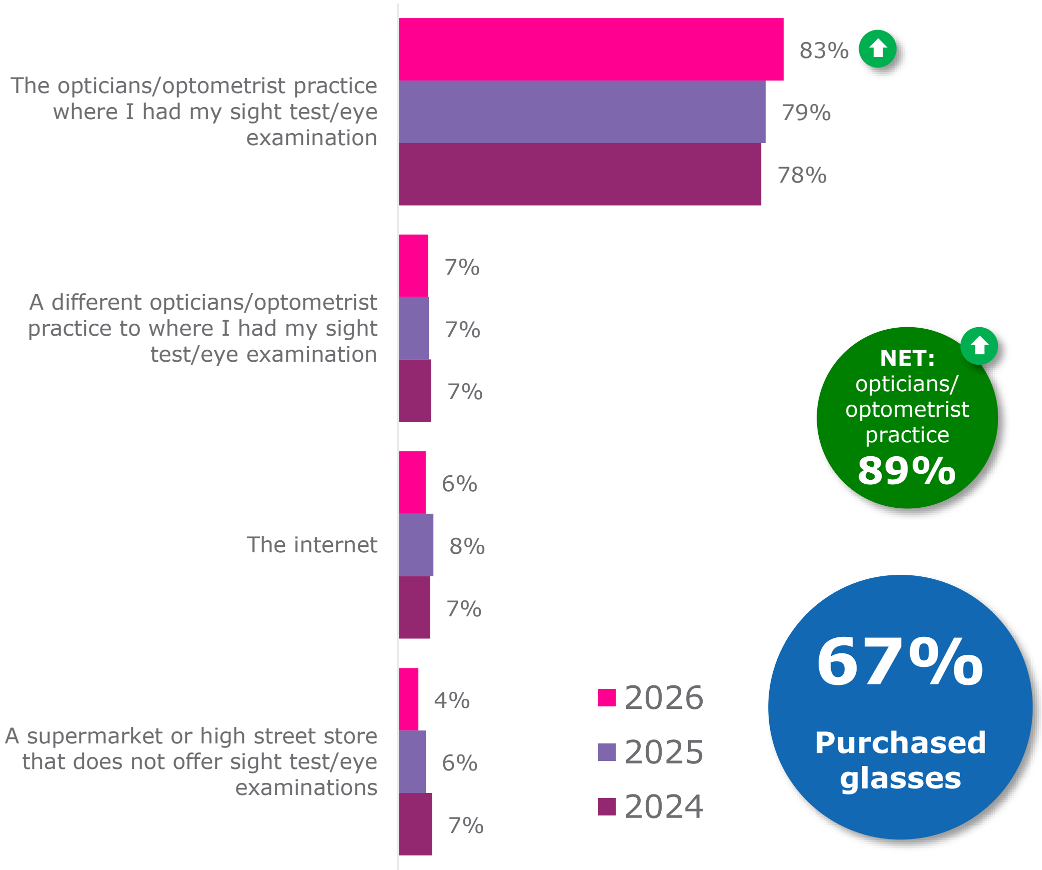
- Under 65s are more likely to have purchased glasses, contacts or both as a result of their visit (78% vs. 61% of those aged 65 and older).
- However, when it comes to buying *glasses specifically*, it is those aged 35 and over who were more likely to have made a purchase compared with those aged 16-34 (61% vs. 49%).
- White participants are less likely to have made a purchase as a result of their sight test/eye examination than ethnic minority participants (72% vs. 80%).

Consistent with previous waves, those who had their sight test/eye examination at a high street opticians/optometrist practice are more likely to have purchased glasses only as a result of their sight test/eye examination (61%). Alternatively, those whose sight test/eye examination was performed at a hospital facility are significantly more likely to have purchased contact lenses only (14% vs. 7% overall), or both glasses and contacts (15%).

Q010. Did you purchase glasses or contact lenses as a result of your sight test/eye examination? **Base:** All participants who have had a sight test/eye examination in the past two years (1,676), 2025 participants (1,616), 2024 participants (1,599).

Source of glasses purchase

Of those who purchased glasses as a result of their sight test/eye examination, over eight in ten (83%) purchased them from the same opticians/optometrist practice where they had their sight test/eye examination; this represents a significant increase on 2025 (79%).



Those more likely than average to have purchased their glasses from the same opticians/optometrist practice where they had their sight test/eye examination include:

- Those aged 65 and over (90% vs. 77% of 16-34s)
- White participants (85% vs. 76% of ethnic minority participants)
- Those who say they are not financially struggling (86% vs. 78% of those who say they are struggling).

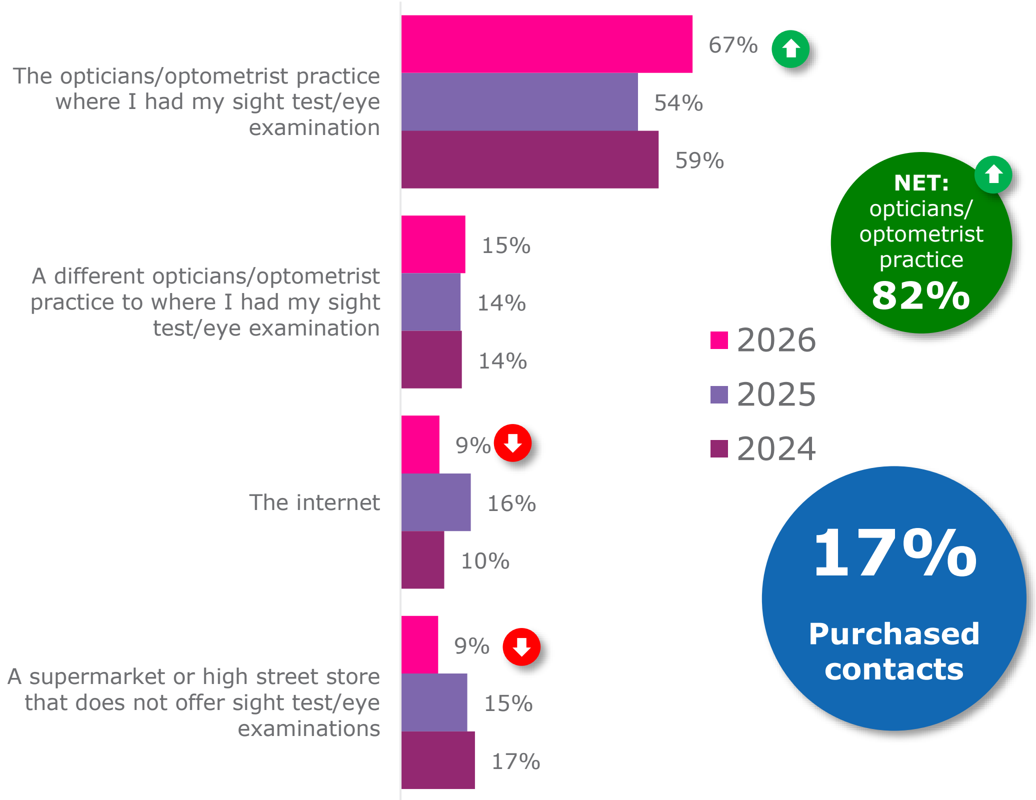
Those in social grades C2DE (9%), those with 4 or more vulnerability markers (12%) and those who say they cannot afford essentials (12%) are all more likely to purchase their glasses from the internet (vs. 6% overall).

Those who had their sight test/eye examination in a hospital facility (12%), those aged 16-24 (11%) and ethnic minorities (11%) are all more likely to have purchased their glasses from a *different* opticians/optometrist practice to where they had their sight test/eye examination (vs. 6% overall).

Q012. Where did you purchase your glasses from? **Base:** All participants who purchased glasses (1,135), 2025 participants (1,070), 2024 participants (1,013).

Source of contact lenses purchase

Of those who bought contact lenses as a result of their sight test/eye examination, over two thirds (67%) purchased them from the same opticians/optometrist practice where they had their sight test/eye examination, a significant increase compared to 2025 (54%). As seen in previous waves, those who purchased contact lenses are more likely report using other sources than the opticians/optometrist practice, compared with those who purchased glasses.



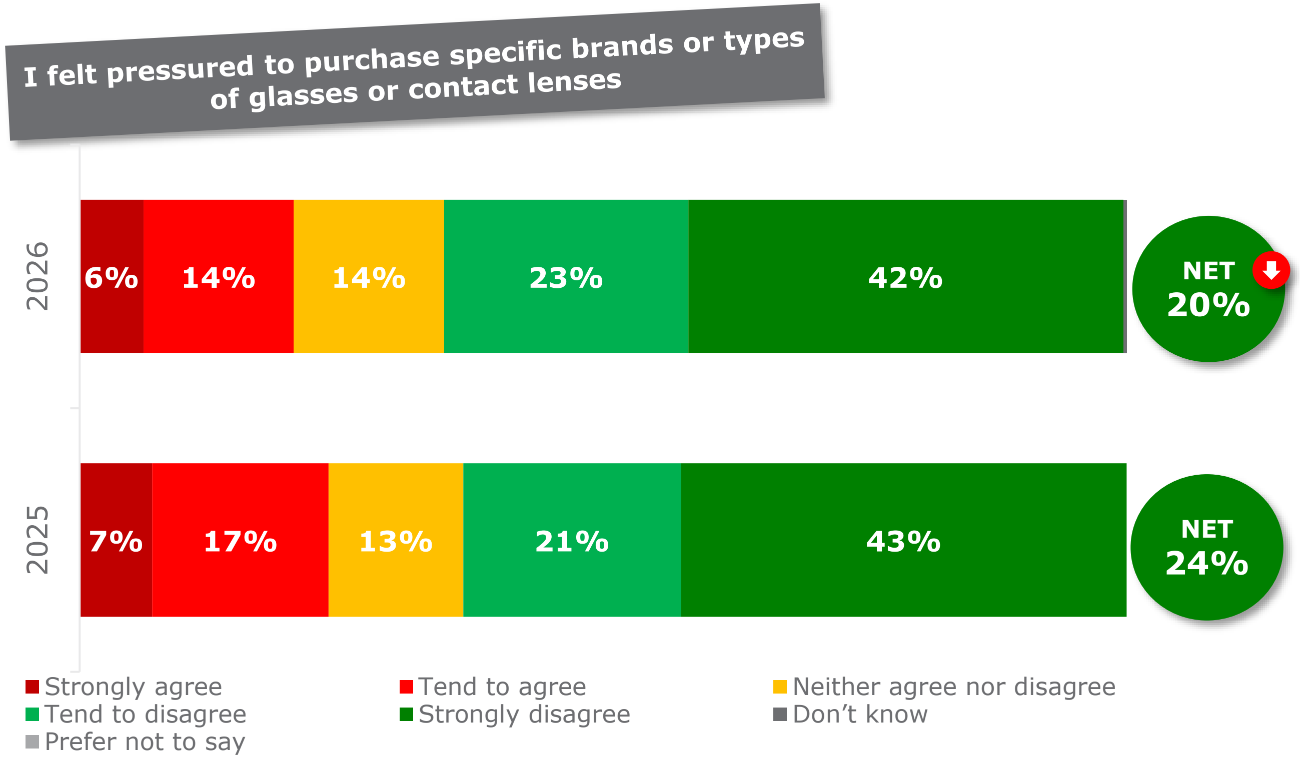
Those aged 45-54 are more likely to have purchased their contact lenses from the opticians/optometrist practice where they had their sight test/eye examination (87%), while those aged 16-34 are more likely to have purchased their contact lenses at a *different* opticians/ optometrist practice to where they had their sight test/eye examination (19% vs. 15% overall).

White participants are more likely to have purchased contact lenses from the opticians/optometrist practice where they had their sight test/eye examination (77% vs. 54% of ethnic minorities), whereas ethnic minority participants are more likely have bought them from a *different* opticians/optometrist practice (23% vs. 8% of white participants).

Q013. Where did you purchase your contact lenses from? **Base:** All participants who purchased contact lenses (255), 2025 participants (205), 2024 participants (196).

Experience of purchase

Of those who purchased either glasses or contact lenses, one in five (20%) agree that they felt pressure to purchase specific brands or types of glasses or contact lenses, though this has fallen since 2025 (24%). Around two thirds (65%) disagree that they felt this pressure.



Groups who are more likely to **agree** that they felt pressure to purchase specific brands or types of glasses or contact lenses include (vs. 19% overall):

- Those aged 25-44 (33%)
- Ethnic minorities (31%)
- Those living in England (22%)
- Those who are working (24%)
- Those who had their sight test/eye examination at a hospital facility (38%)
- Those who say they are struggling financially (25%)
- Those with an eye condition (27%)

Q013A. Thinking about when you last purchased glasses or contact lenses, to what extent do you agree or disagree with the following statements? **Base:** All participants who have purchases glasses OR contact lenses (1,238), 2025 participants (1,177).

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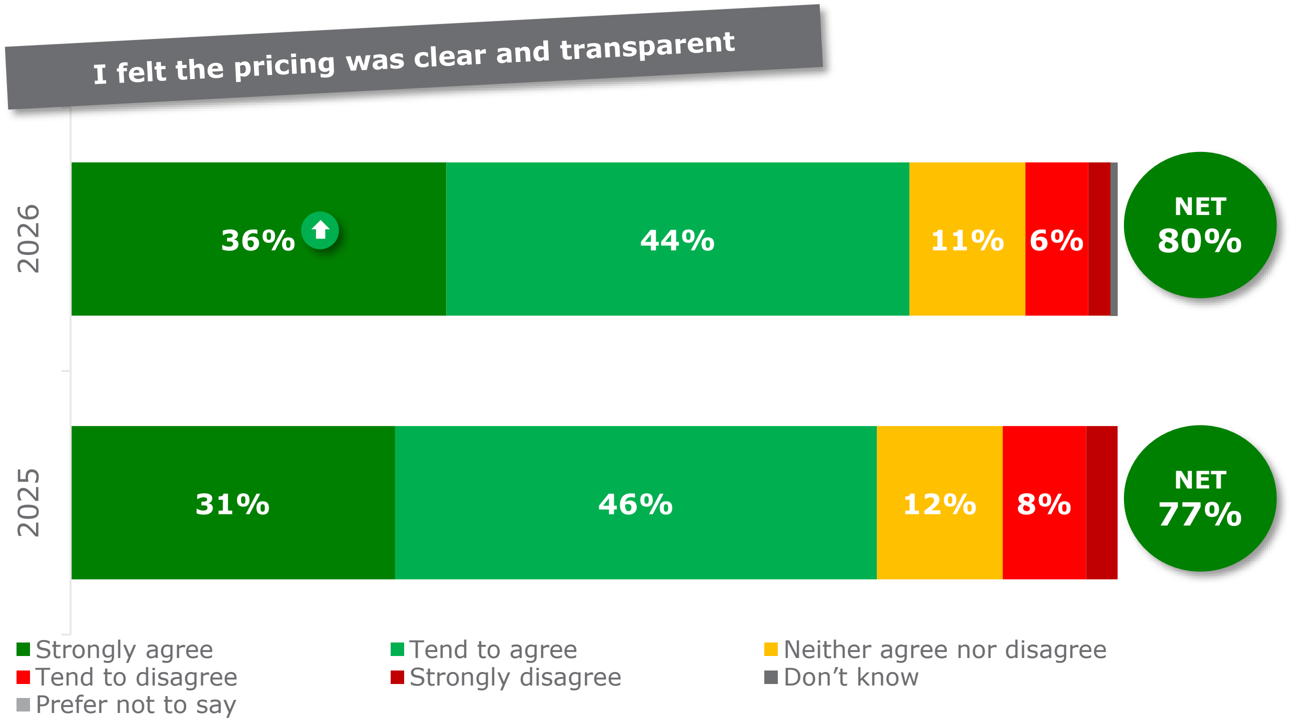
Experience of purchase

Eight in ten (80%) agree that the pricing was clear when they last purchased glasses or contact lenses, with more than one third (36%) reporting that they *strongly agree,* a significant increase on 2025 (31%). Less than one in ten (8%) disagree with the statement.



Groups who are more likely to **agree** that the pricing was clear and transparent include (vs. 80% overall):

- ABC1 social grades (82% vs. 76% of C2DEs)
- Those with an income of over £50,001 (86%)
- Those with no vulnerability markers (83%)

Groups who are comparatively more likely to **disagree** with the statement include (vs. 8% overall):

- Those aged 35-64 (10%)
- Those earning £25,001-£35,000 (14%)
- Those who say they are struggling financially (11%)

Q013A. Thinking about when you last purchased glasses or contact lenses, to what extent do you agree or disagree with the following statements? **Base:** All participants who have purchases glasses OR contact lenses (1,238), 2025 participants (1,177).

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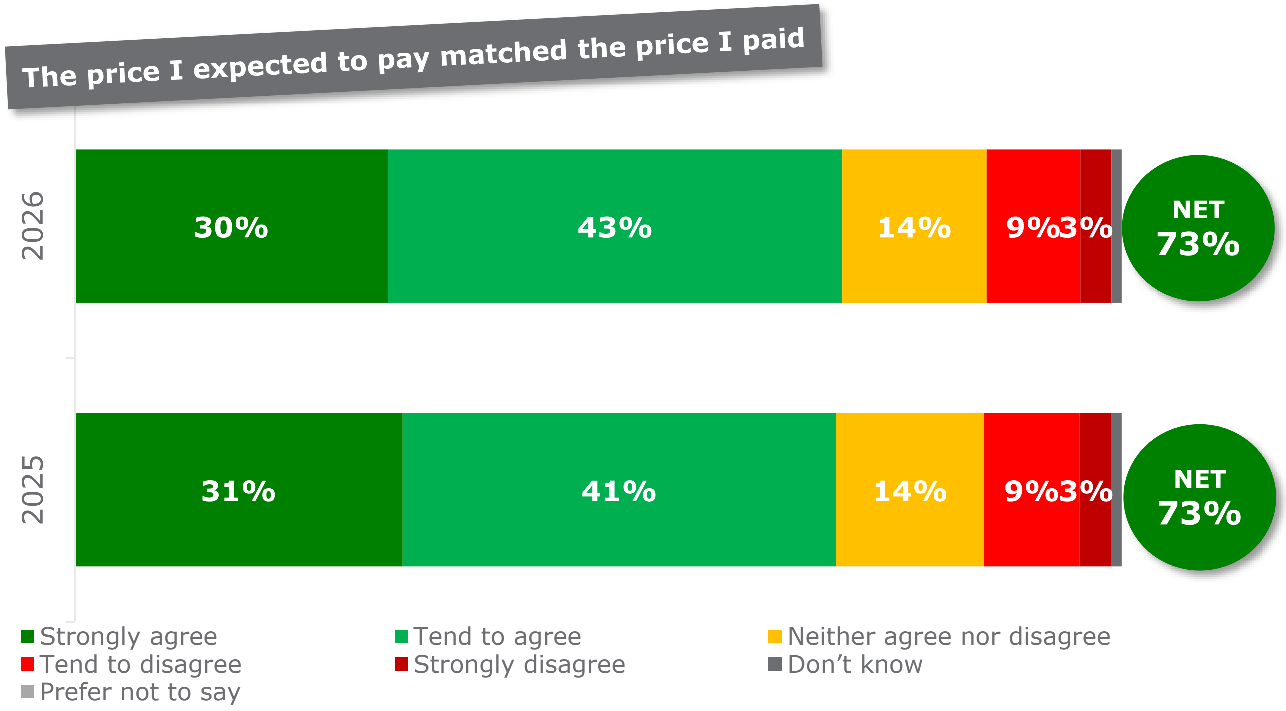
Experience of purchase

Amongst those who purchased glasses or contact lenses as a result of their sight test/eye examination, three quarters (73%) agree that they paid the price that they had expected, while only 12% disagree. These findings are in line with 2025.



Groups who are more likely to **agree** that the price they paid matched what they expecting include:

- Males (76% vs. 71% of females)
- ABC1 social grades (75%)
- Those with an income of over £50,001 (77%)
- Those with no vulnerability markers (76%)
- Those who say that they knew the price before their appointment (76%)

Groups who are more likely to **disagree** with the statement include:

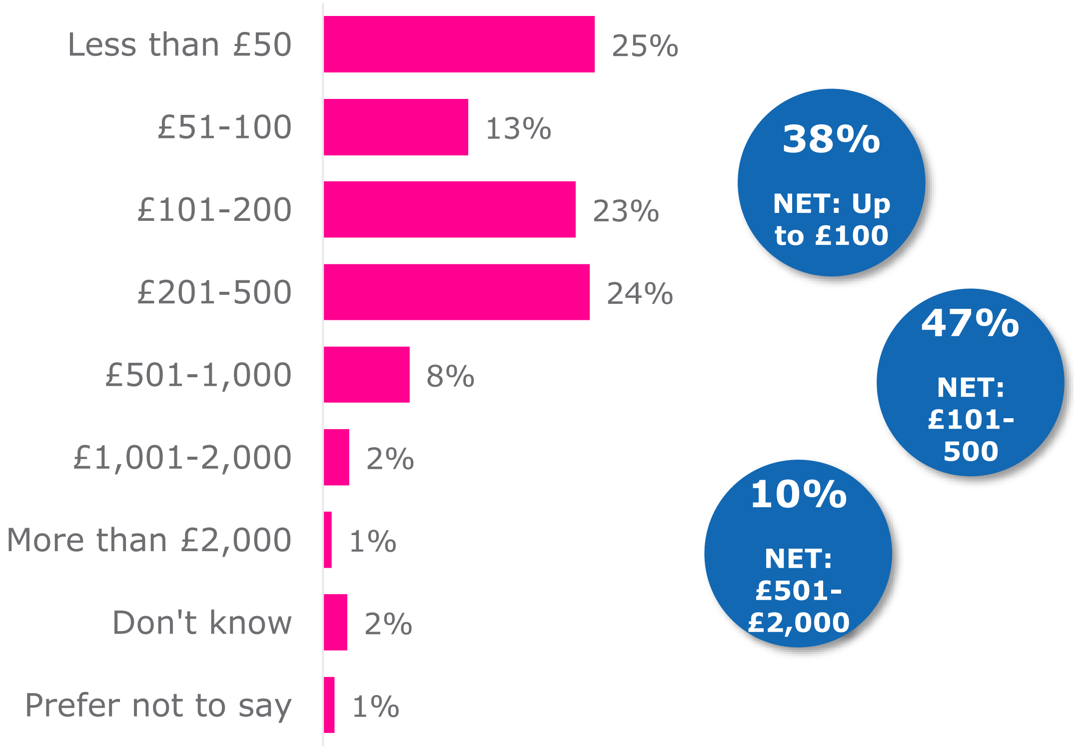
- Females (14% vs. 9% of males)
- Those with at least one vulnerability marker (14%) – and higher amongst those with 4 or more markers (24%)
- Those who say they are struggling financially (15%)
- Those who did not know the price beforehand (17%)

Q013A. Thinking about when you last purchased glasses or contact lenses, to what extent do you agree or disagree with the following statements? **Base:** All participants who have purchases glasses OR contact lenses (1,238), 2025 participants (1,177).

Chart is missing figures due to small proportions and spacing

Total spent on eye care service in the past 12 months

For the first time participants were asked how much they had spent in total on eye care services in the last 12 months. One quarter (25%) say they spent less than £50 – similar proportions spent either £101-200 (23%) or £201-500 (24%). Fewer participants spent £51-100 (13%), and even fewer spent larger amounts of £501-1,000 (8%), £1,001-2000 (2%), or more than £2,000 (1%).



By demographics, those aged 16-34 are more likely than average to have spent between £501-£2,000 on eye care services in the last 12 months (15% vs. 10% overall). Those aged 35-64 are more likely to have spent between £101-500 (52% vs. 47% overall), while those aged 65 and older are more likely to have spent up to £100 (52%).

By region, those in England are more likely than average to have spent between £501-2,000 (11%).

Those with a disability are more likely to have spent up to £100 (46%), as are those in C2DE social grades (44%), those with less than £20,000 income (58%), who have at least one vulnerability marker (44%), and those not in work (50%).

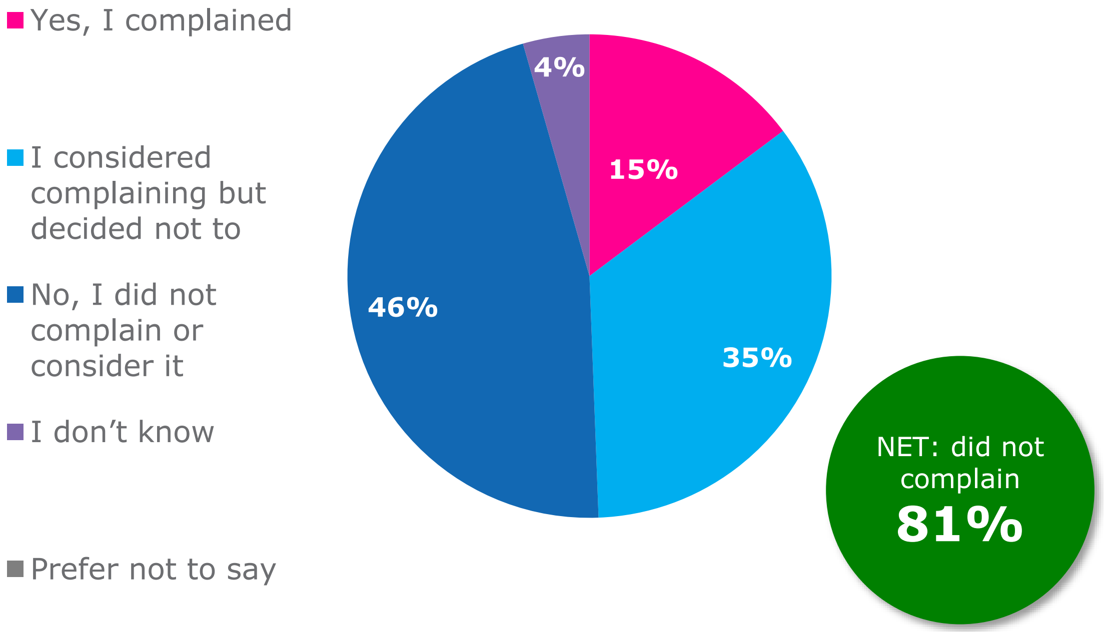
Q014A_0. In the last 12 months, how much have you spent in total on eye care services (e.g. the sight test/ eye examination, glasses, contact lenses, eye care plans and other services)? **Base:** All respondents who have had an eye test in the past two years (1,676).

Poor experiences and complaints

Complaints about the experience

New to this year, those who were dissatisfied with their overall experience of the opticians/optometrist practice were asked if they complained or considered complaining about the experience*. Less than half (46%) said they did not complain or consider it, while 35% considered complaining but decided not to. 15% say they complained.

Sub-group analysis is not possible due to very small base sizes.

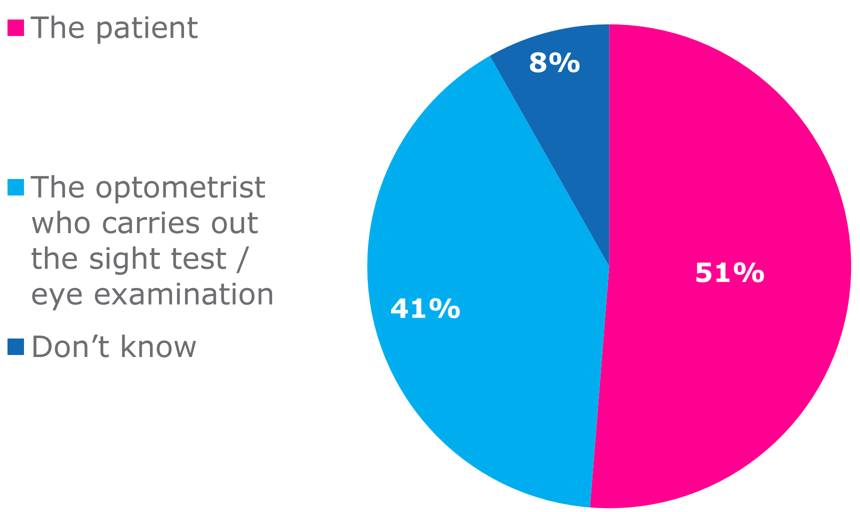


Q019. Thinking about your most recent experience at the opticians/ optometrist practice, did you complain or consider complaining about the experience**? Base:** All respondents who were dissatisfied with their overall experience of the opticians/optometrist practice (52).

* Very small base

Responsibility for notifying the DVLA if sight falls below driving standard

In this wave*, all participants were asked who they think should be responsible for notifying the Driver and Vehicle Licensing Agency (DVLA) or Driver and Vehicle Agency (DVA for Northern Ireland) if a patient's sight test falls below the standard required to drive safely. Just over half (51%) think the patient should be responsible, while just over two in five (41%) think the optometrist should be responsible. Less than one in ten (8%) say they don’t know.



Those aged 45-54 are more likely than average to think the patient should be responsible (57%), those aged 35-44 are more likely to think it should be the optometrists responsibly.

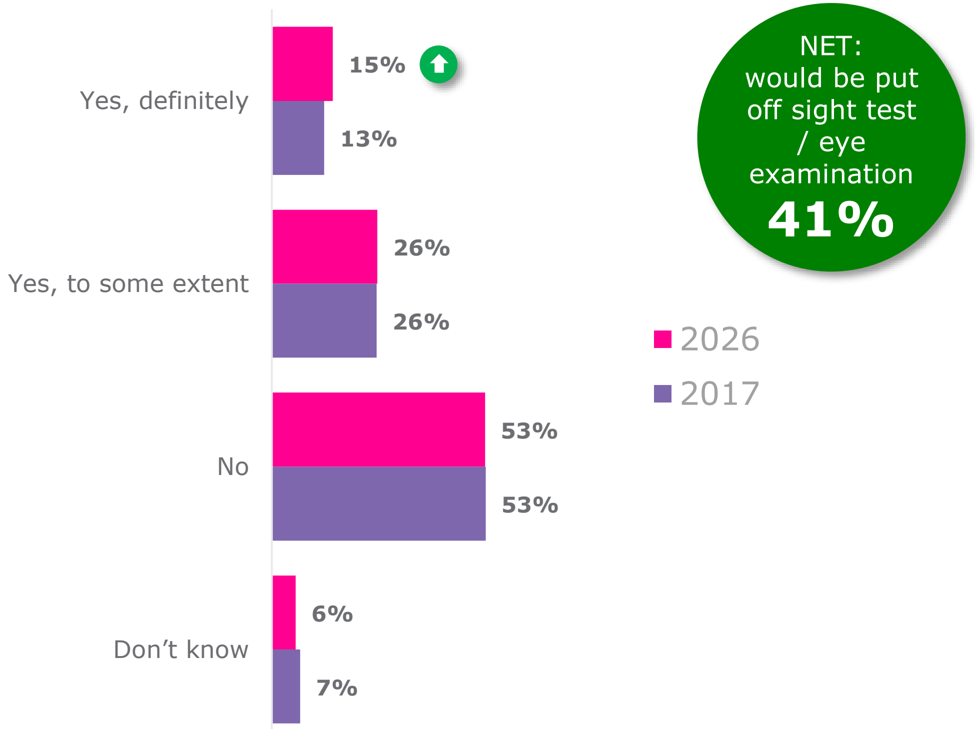
Those who had their last sight test/eye examination at a high street opticians/optometrist practice are more likely than average to think it should be the patient's responsibility (53%).

Q020. If a patient visits an opticians/optometrist practice, and after getting their sight tested they fall below the standard required to drive safely, who do you think should be responsible for notifying the Driver and Vehicle Licensing Agency (DVLA) or Driver and Vehicle Agency (DVA for Northern Ireland)? **Base:** All participants (2,014).

* Question was originally asked in 2017, but the code ‘Both the patient and the optician’ was removed from this wave due to it not being a viable policy option. This change in question means figures are not comparable.

Feelings towards sight test / eye examination if DVLA notification was required

Returning from the 2017 survey, all participants were asked if they would be put off going for a sight test/eye examination if the optometrist who carried out their test was required to automatically notify the DVLA or DVA of patients who fall below the standard required to drive safely. This year sees a small but significant increase in those who say yes, definitely compared to 2017 (15% vs. 13% 2017). All other proportions remain in line with 2017.



Those aged 16-34 are more likely than average to say automatic notification would put them off going for a sight test/eye examination (56% vs. 41% overall), whereas those aged 65 and older are more likely to say no (73% vs. 53% overall).

Those with a disability are more likely than average to say they would not be put off going for a sight test/eye examination (59%).

Those in work are more likely than average to say they would be put off going for a sight test/eye examination compared to those not in work (49% vs. 32%).

Q021. If the optometrist who carried out your sight test was required to automatically notify the DVLA or DVA of patients who fall below the standard required to drive safely, and you were concerned about your vision, would this put you off going for a sight test / eye examination**? Base:** All participants (2,014), 2017 participants (3,025).

04 Advanced statistical analysis

IMD deprivation analysis: overview

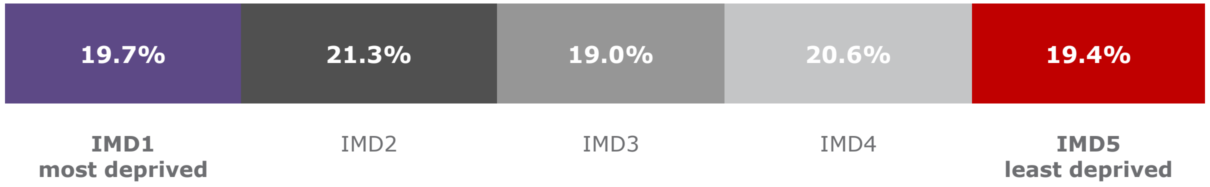
In this wave, GOC wanted to explore whether respondents' experiences and access to eye care services differed by levels of area deprivation, to help understand whether there are any patterns that could inform future work on health inequalities. This was done by matching respondents' postcodes, where provided, to published Index of Multiple Deprivation (IMD) data. This enabled the survey data to be segmented by IMD quintile, from the most deprived 20% of areas to the least deprived 20%.

The analysis focused on measures such as confidence in eye care services, latest sight tests/eye examinations, satisfaction with experiences, and barriers to accessing sight tests/eye examinations. As postcode data was also available in wave 1 of the survey, analysis was also conducted on this wave for indicative comparison.

A note on interpretation: postcode provision was optional, so not all respondents could be classified. However, around 94% of all wave 3 respondents were matched to an IMD quintile, and the wave 3 sample is broadly even across IMD quintiles.

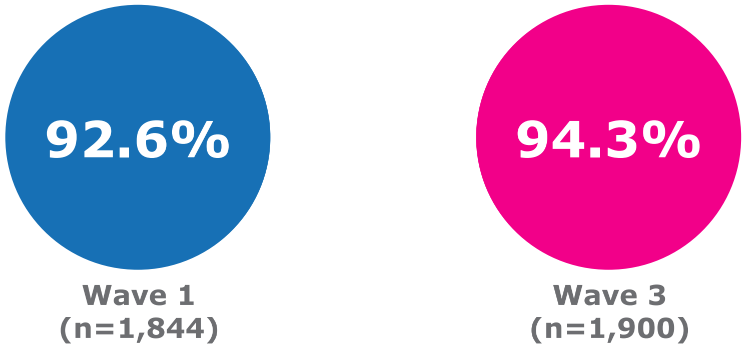
IMD is an area-level lens. It should complement, rather than replace, individual-level vulnerability markers in the main report.

Wave 3 spread by IMD quintile



No quotas were set on IMD, yet each quintile is close to the expected 20% share. Analysis focuses on quintiles rather than deciles to protect base sizes for subgroup comparisons.

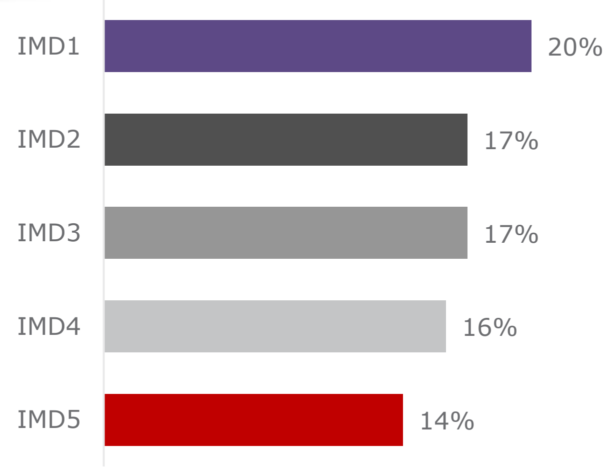
Coverage of postcode classification



IMD deprivation analysis: access

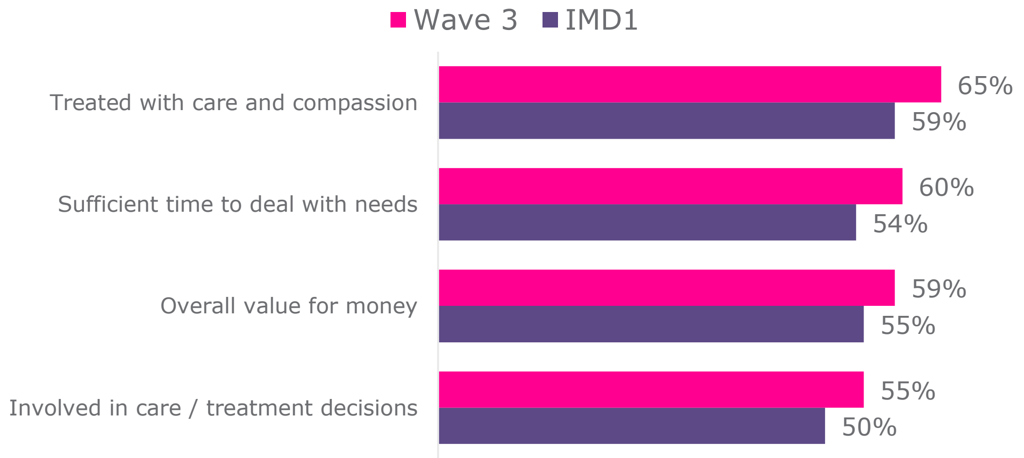
Confidence and overall satisfaction vary only modestly by IMD. The clearest differences are seen in whether people have had a recent sight test, and in the proportion saying they were ‘very satisfied’ with aspects of their experience.

Not had a sight test in the last two years



IMD1 is significantly higher than the total; IMD5 is significantly lower.

Very satisfied by aspect: IMD1 vs Wave 3



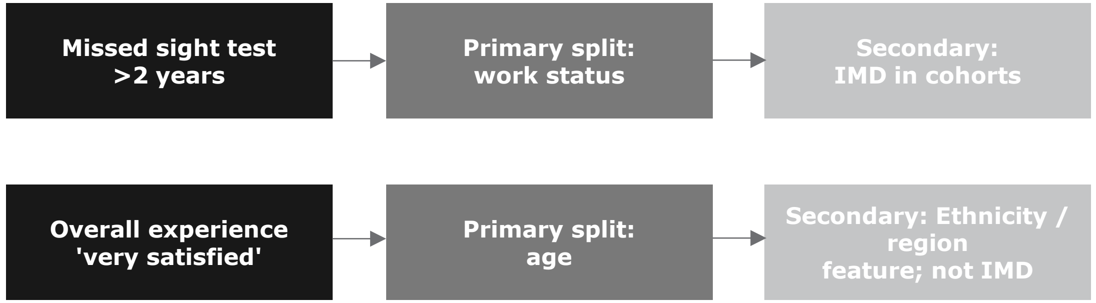
Net satisfaction remains high: overall experience is 90%-92% across IMD quintiles. IMD1 is significantly lower when compared to the total sample,

Overall satisfaction is very similar across IMD groups, but people in the most deprived areas (IMD1) are more likely to be overdue a sight test and less likely to say they were ‘very satisfied’ with aspects of their experience.

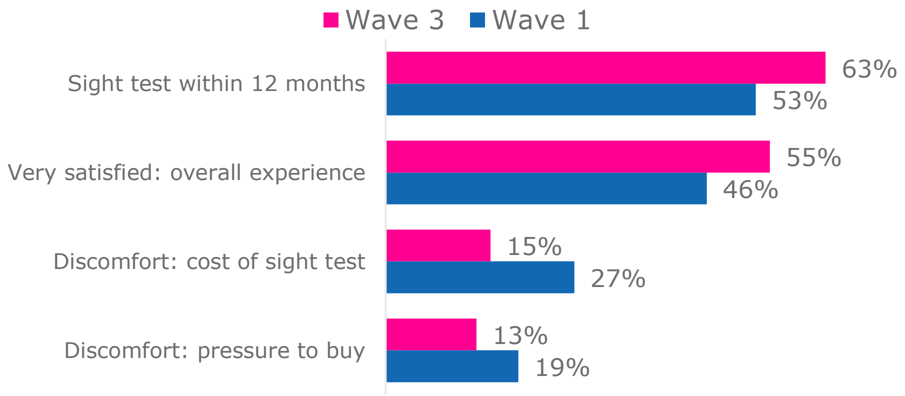
IMD deprivation analysis: CHAID analysis

CHAID analysis was used to test whether IMD was one of the strongest predictors of access and satisfaction when considered alongside other profile characteristics. It works by splitting respondents into groups based on the factors that best explain differences in outcomes.

Which factors best explain access and satisfaction?



Positive movement among IMD1 since Wave 1



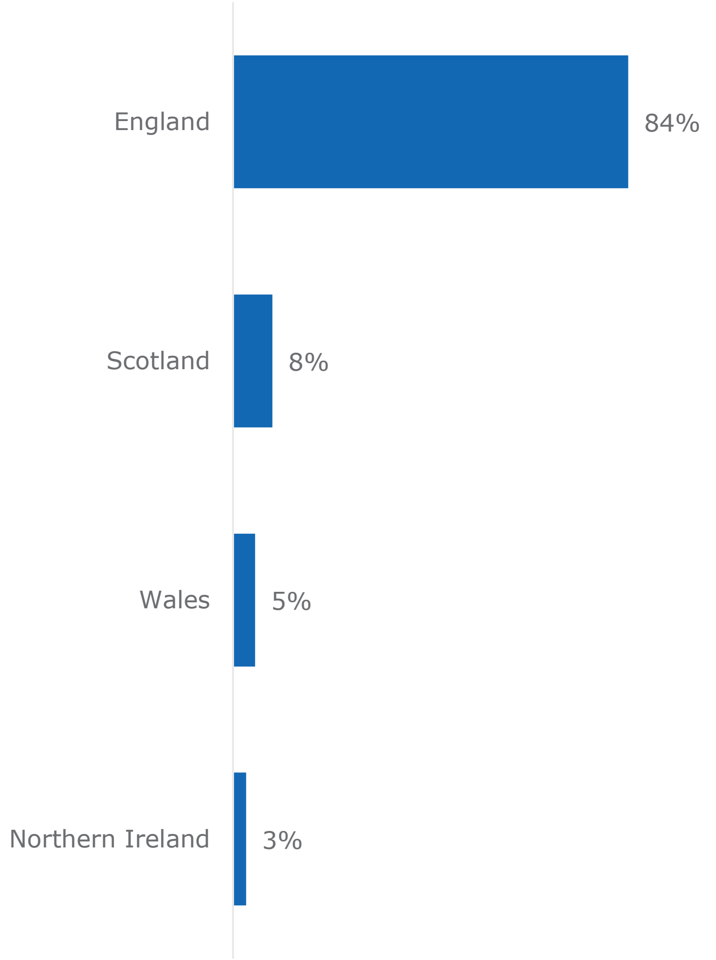
Among IMD1, access and experience look better in Wave 3 than Wave 1 (more recent sight tests and higher 'very satisfied' overall). Discomfort linked to cost and pressure to buy is lower (lower is better).

Work status is the strongest differentiator for missing sight tests, though IMD is secondary factor behind this. Age is the strongest differentiator for being very satisfied with the overall experience. IMD therefore helps explain some access differences, but it is not the dominant driver of access or satisfaction.

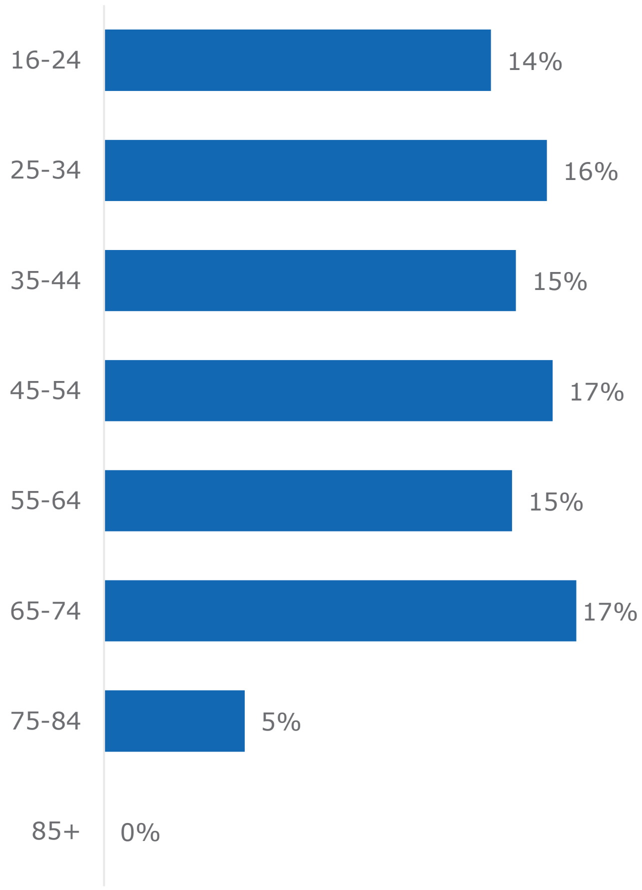
05 Audience profile

Weighted profile of participants (1)

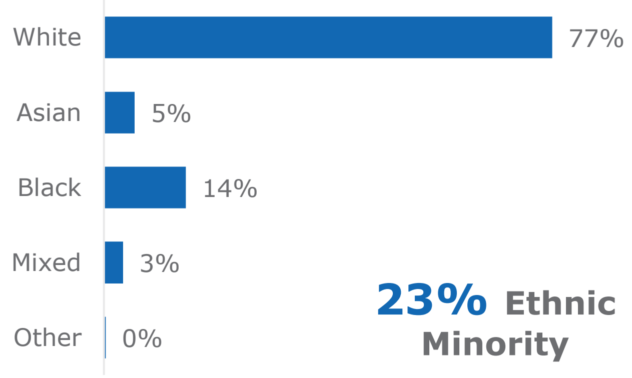
Nation



Age group

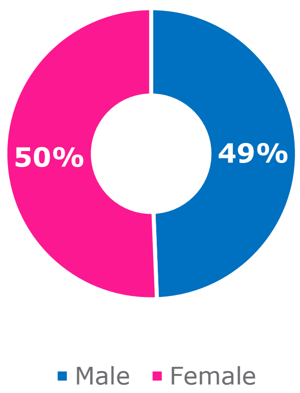


Ethnicity



23% Ethnic Minority

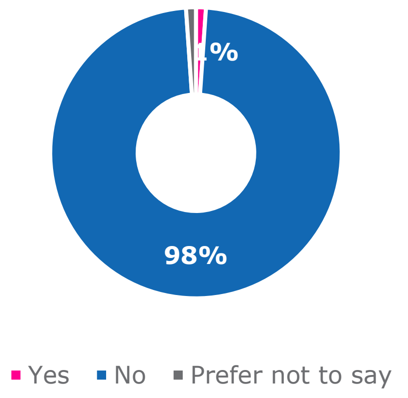
Gender



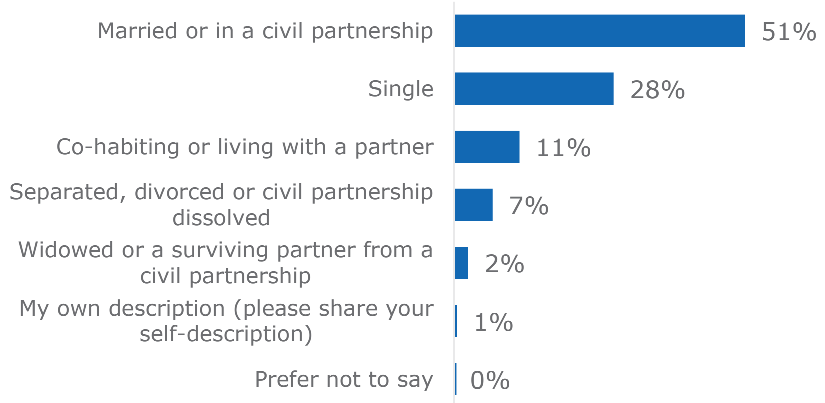
Source: S02, S03, S05, S06 **Base:** All participants (2,014)

Weighted profile of participants (2)

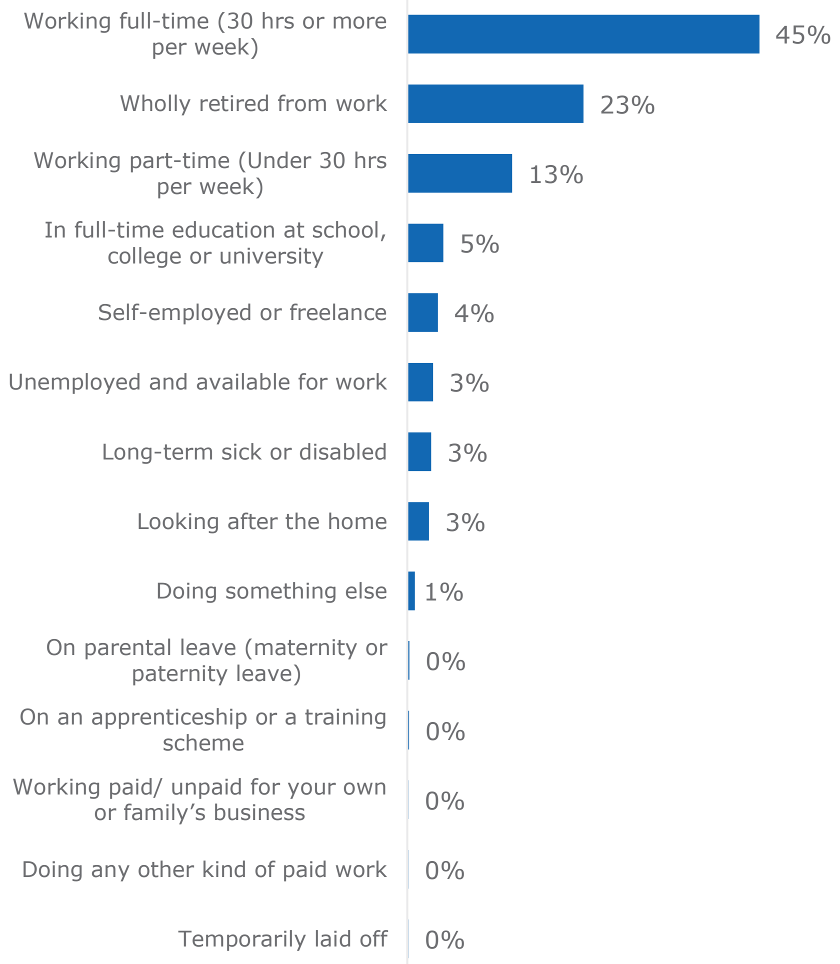
Trans history



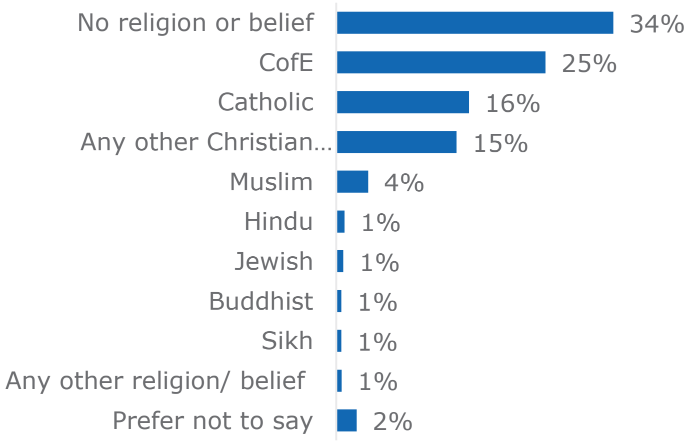
Marital status



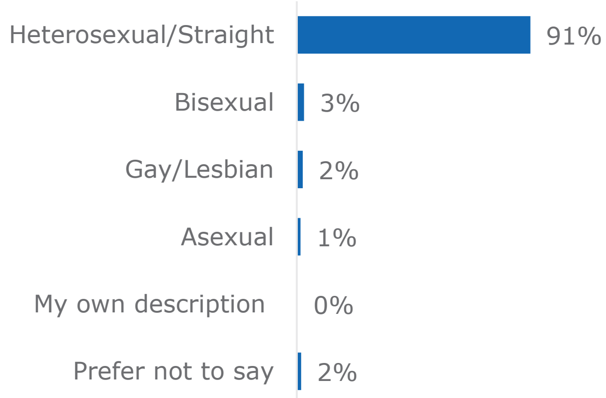
Working status



Religion



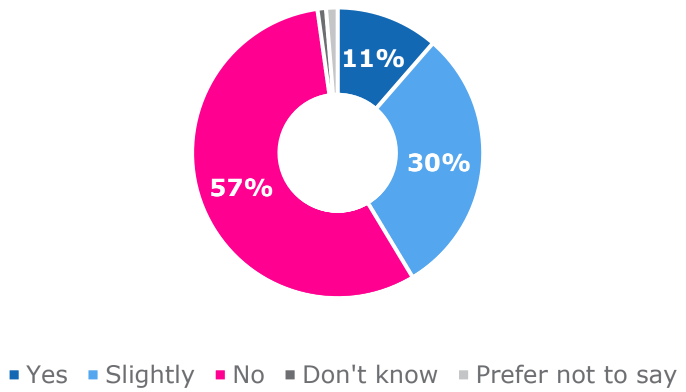
Sexual orientation



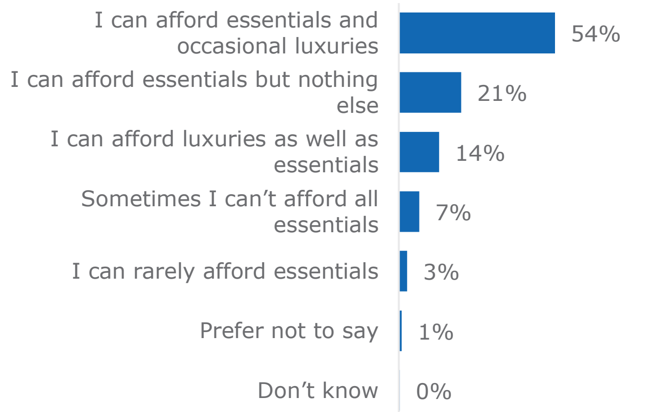
Source: C02, C02a, C05, C07, C08 **Base:** All participants (2,014).

Weighted profile of participants (3)

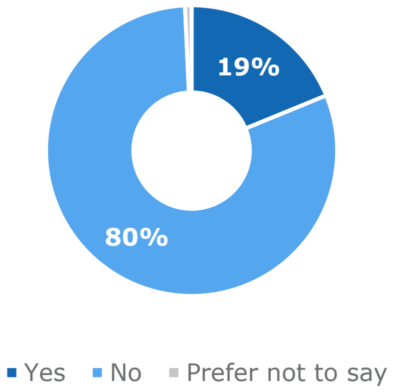
Financially struggling



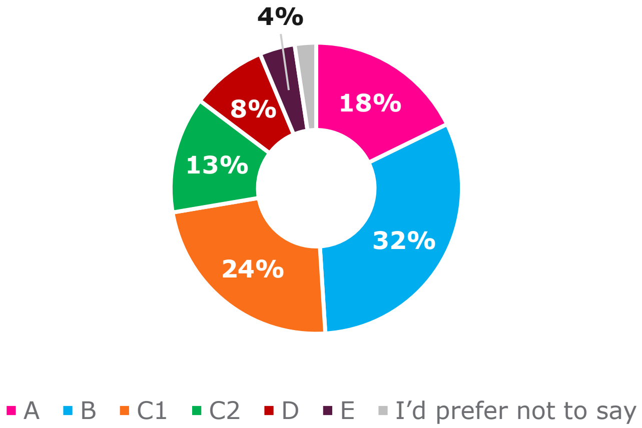
Ability to pay for luxuries or essentials



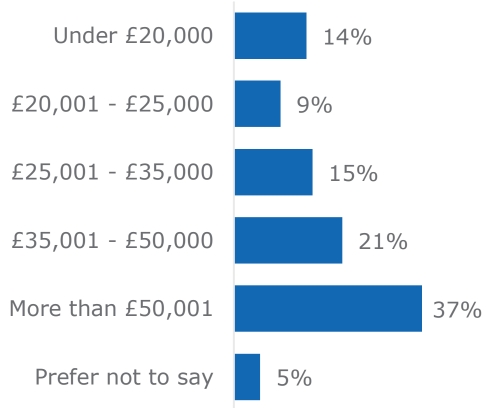
Unpaid caring responsibilities



SEG



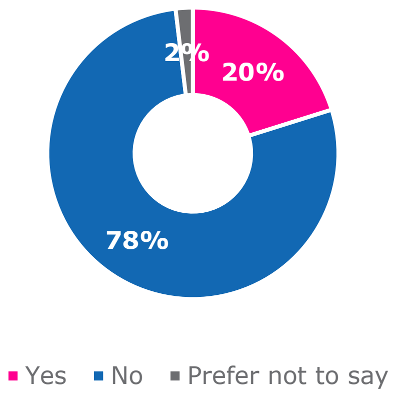
Annual income



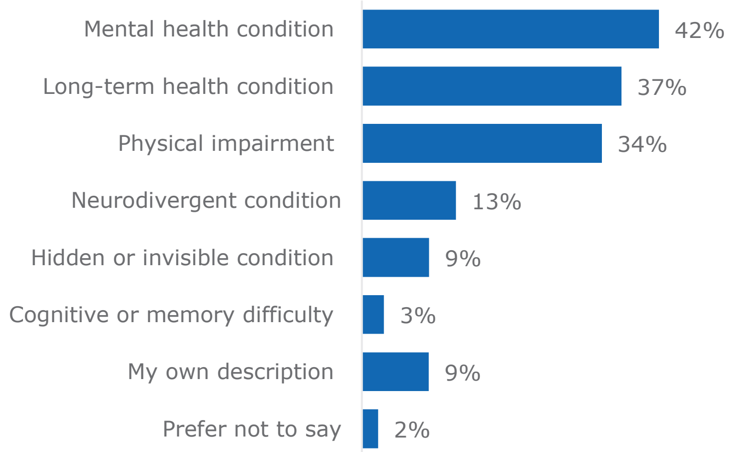
Source:, C06a, C09, C10, C011, C014, C15 **Base:** All participants (2,014)

Weighted profile of participants (4)

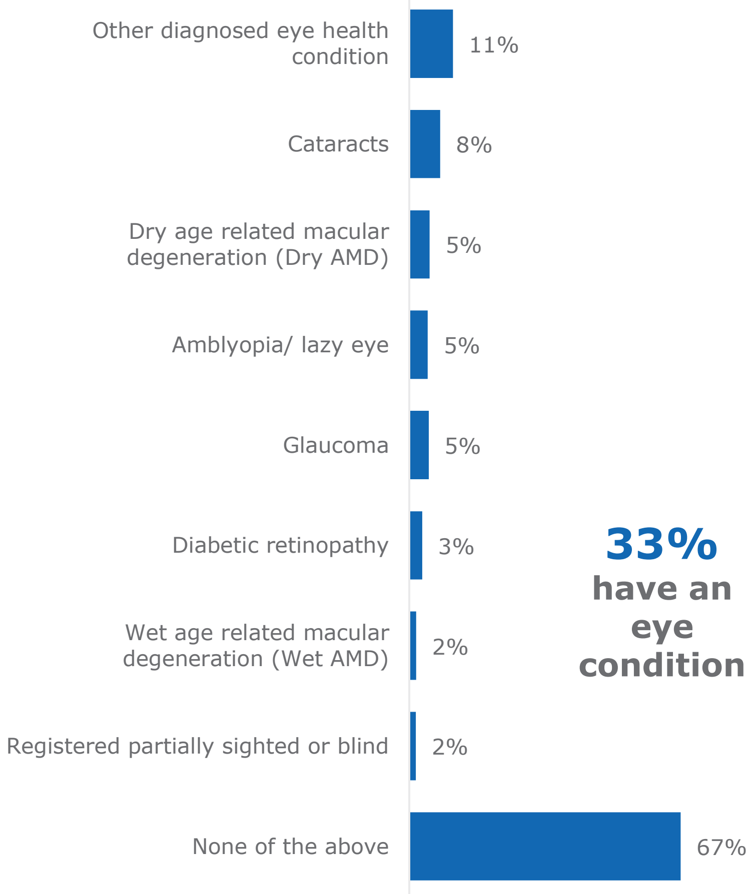
Disability



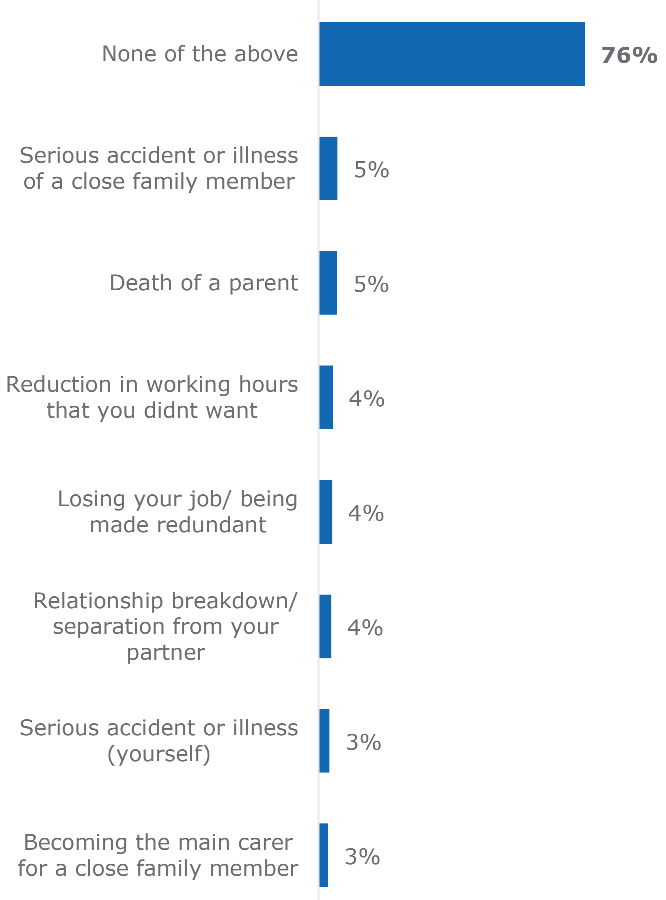
Disability category



Eye conditions



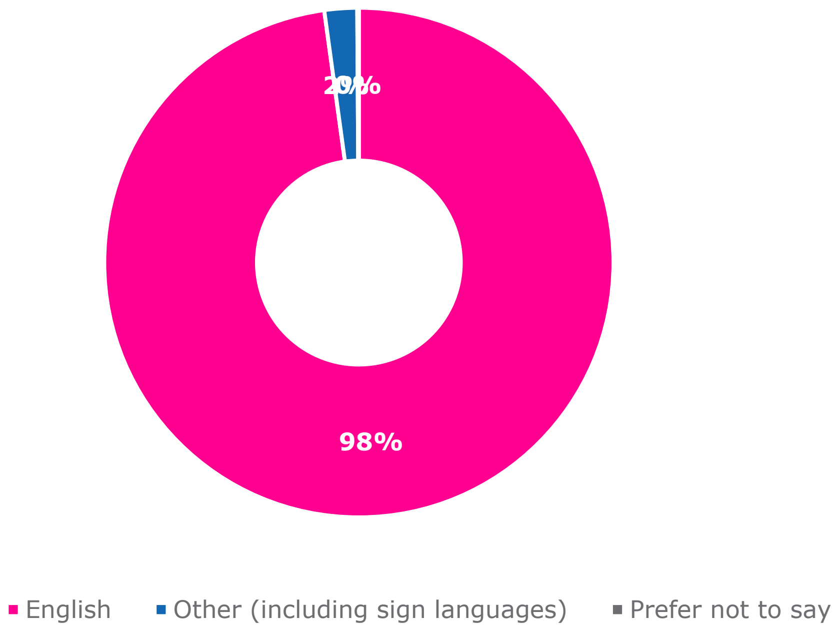
Events experienced in last 12 months (>1%)



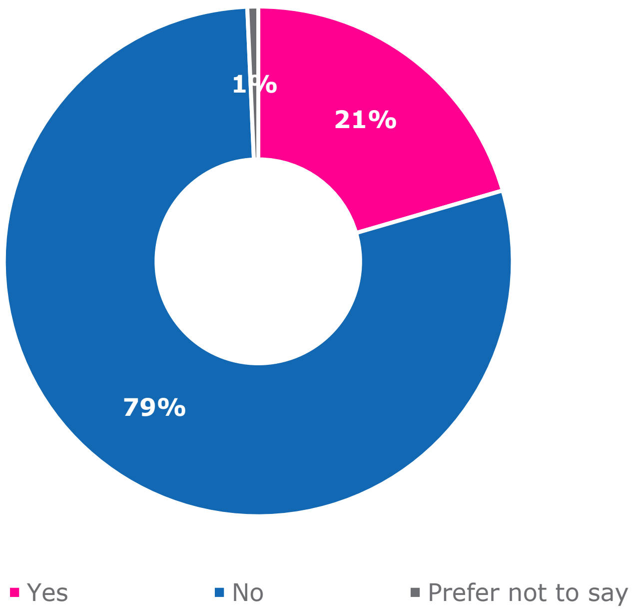
Source: C01, C03, C03A, C12 **Base:** All participants (2,014)

Language

Main language spoken



Additional languages spoken



Source: S07**.** What is your main language? **Base:** All participants (2,014). **S08A.** Do you speak any additional languages fluently (including sign languages)? **Base:** All participants (2,014).

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