General Optical Council

Public Perceptions Research

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02 Summary of findings

Summary of findings

Satisfaction with the overall experience of an opticians/optometrist practice is high (88%). Satisfaction with the **professionals carrying out sight test/eye examinations** is also high (92%).

Three quarters are satisfied with the overall **value for money** when it comes to sight test/eye examinations (75%). Most are satisfied with **the experience of buying glasses or contacts** (74%).

Across all satisfaction metrics, those a**ged 16-24 and ethnic minorities** are **less inclined to be satisfied** than others.

Summary of findings

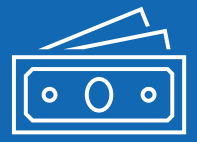
An opticians/optometrist practice remains the instinctive place to go to in the event of an eye problem (33%) despite fewer saying so this year (36% 2023) and remains ahead of a GP practice/surgery (30%). Despite this, **young people aged 16-24** (14%) and **ethnic minorities** (14%) are more likely to turn to an **eye hospital**. Those in **England** are less likely to turn to an opticians/optometrist practice first when compared to all other nations.

The public remain confident of a high standard of care from an opticians/optometrist practice (92%), ahead of GPs, dentists, and pharmacists.

New to this wave, the majority (84%) say they **feel confident** in managing their own eye health, while a small proportion have little confidence (12%).

Summary of findings

The chance of **not being seen on the same day** continues to be the most cited reason for not choosing an opticians/optometrist practice first in the event of an eye problem (28%).



The perceived cost of glasses or contacts (24%) and sight test/eye examinations (18%) drive **reluctance to visit an opticians/optometrist practice**, although a large proportion do not feel uncomfortable (49%).

Almost four in five (79%) have **had a sight test/eye examination in the last two years**, an **increase on previous years** (77% 2023; 74% 2022). Just 4% say they have **never had a sight test/eye examination**.

Summary of findings

Convenience (42%) and affordability (28%) continue to drive opticians/optometrist practice choice, though more shopped around before deciding than in previous years (31%). Three-quarters (74%) still find it easy to find pricing info and are aware they can buy glasses or contacts other than where their sight test/eye examination was conducted (83%).

While most still buy their glasses or contacts from the opticians/optometrist practice where they had their sight test/eye examination (85% and 73%), **more are turning to supermarkets, high street stores, or the internet** for glasses (14%) compared to previous years, particularly amongst those aged 16-44.

Affordability is the main motivation for purchase location (39%), particularly for C2DE groups or those with a household income less than £20,000. **Fewer this year** (63%) **knew the price of their sight test/eye examination before their appointment** (72% 2023), while **37% did not know** the price before their appointment.

Summary of findings

Adverse experiences at an opticians/optometrist practice remain uncommon (12%) among those who visited an opticians/optometrist practice on their last sight test/eye examination, although some groups such as carers, 16-24s and those with a disability are more likely to have experienced something going wrong. The same proportion of those who visited an opticians/optometrist practice on their last sight test/eye examination made a complaint or actively considered doing so (12%), although carers and those with a disability are more likely to do so.

Among those who have complained, the majority subsequently **received an apology** (69%), although a sizeable proportion did not (28%).

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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 the sight test/eye exam, confidence and trust in the optical professions, shopping habits and complaints.

Making decisions based on evidence is a strategic priority for the GOC, and this research is fundamental to continue striving for improvements in the service provided to patients – the findings of the annual survey have been used to both inform the policy work conducted 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 2024 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 **17 January – 8 February 2024**.

A total of **2,035 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.

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 previous waves had been weighted back 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 factors).

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 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+ 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		
	10% or 90% ±	30% or 70% ±	50% ±
2,035 (all participants)	1.3%	2.0%	2.2%
1,599 (all participants who have had a sight test/eye examination in the last two years)	1.5%	2.2%	2.5%
1,119 (all participants who have purchases glasses OR contact lenses)	1.8%	2.7%	2.9%

For example, with a sample of 2,035 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 struggling financially
- Say they cannot afford essentials.

Vulnerability markers have been grouped into five different categories:

- None
- One
- Two to three
- At least 1
- Four or more

03 Main report findings

Key Driver Analysis

In order to better understand which factors influence overall satisfaction, Key Driver Analysis (KDA) was conducted on the weighted data. KDA is a data modelling method. It is used to look at which group of variables in questionnaire data have the greatest influence on a 'key' measure – the key measure in this survey is 'Your overall experience of the opticians/optometrist practice'.

In order to conduct KDA, a set of potential drivers is created from the survey data (independent variables) such as attitudes and behaviours, and then a regression analysis is conducted to see which of these independent variables have the greatest influence on the key measure. Some of these variables will be Key Drivers (have significant influence) and some of them will not have a significant influence on the key measure above and beyond the Key Drivers.

The Key Drivers are ranked in order of how much they influence the key measure, and we also show the Relative Importance, which is the strength and direction of the influence of each individual factor. This identifies measures which have the strongest positive or negative influence on the key measures.

When a KDA is conducted, only the 'valid base' is used – this excludes participants who gave a 'Don't know' response, those who weren't asked the question, or those who said it was not applicable.

In the KDA conducted, the following potential drivers, or independent variables, were used from the different themes across the questionnaire;

- Barriers (Q3)
- Motivations (Q6)
- Engagement with opticians/optometrist practice services
- Experience of opticians/optometrist practices (encountered problems, VFM etc)

Throughout the report, markers have been placed at the relevant variables, indicating whether they are positive or negative key drivers.

Key Driver Analysis: overall satisfaction

Key Driver Analysis was undertaken to identify which questions, collectively, have the most influence on levels of **'overall satisfaction with opticians/optometrist practices'**.

The drivers identified in the table to the right show where to focus efforts in return for the biggest rewards. For example, bringing about improvements in the **buying experience for glasses or contact lenses** (2) or finding alternative solutions for **those who do not like someone physically close to them** (7) would result in a jump in overall satisfaction.

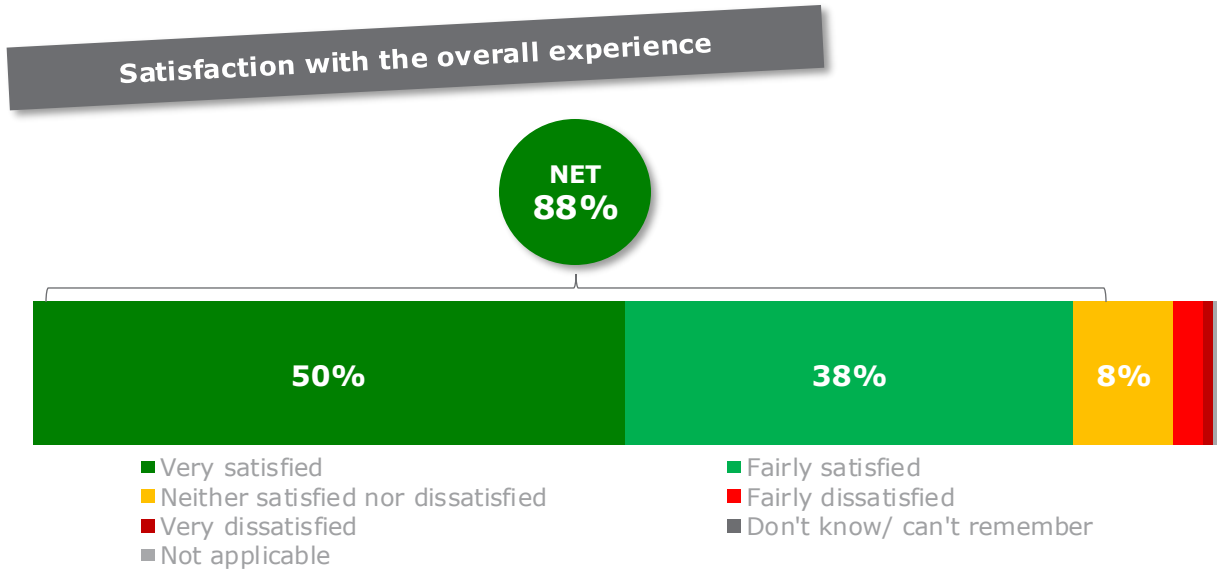
The overall fit of this model is strong with **R-square=0.691** (which means that the 10 key drivers listed together explain 69.1% of the variance in satisfaction). Some of the drivers have a positive impact on confidence ratings – for example, an increase in the proportion of participants who **do not feel uncomfortable** about visiting an opticians/ optometrist practice is likely to result in higher levels of satisfaction (positive drivers are noted in the table with ↑). However, some drivers have a negative impact – for example, an increase in customers who have **complained or considered complaining** is likely to result in lower levels of satisfaction (negative drivers are noted with ↓).

Rank	Question	Variable	Direction	Relative importance	Performance (% of sample giving this response)
1	Q18	Very satisfied with optometrist	↑	0.303	48%
2	Q18	Very satisfied with experience of buying glasses/lenses	↑	0.165	31%
3	Q16	Complained/consider complaining	↓	0.139	10%
4	Q18	Very satisfied with VFM	↑	0.121	25%
5	Q3	I have not felt uncomfortable	↑	0.055	49%
6	Q4a	Sight test/eye examination within last year	↑	0.051	58%
7	0	Barrier - don't like someone physically close to me	↓	0.045	5%
8	Q3	Barrier - fear of diagnosis	↓	0.043	13%
9	Q15	Experience a problem	↓	0.040	9%
10	Q6	Motivation - same healthcare professional as previous	↑	0.038	15%

Satisfaction levels

Satisfaction with the overall experience

Nine in ten (88%) are satisfied with the overall experience of the opticians/optometrist practice, with half of participants (50%) being very satisfied. Only 3% of participants are dissatisfied.



While statistical comparisons with previous waves cannot be made due to a change in the answer scale, the patterns show that the vast majority are satisfied and fewer than one in ten are dissatisfied

Mirroring the findings for other satisfaction questions, those aged 16-24 (76%) are significantly less likely to be satisfied with the overall experience than older participants, especially those aged 65 and over (94%). Those from an ethnic minority background are less satisfied than white participants (84% vs. 91%).

As seen in previous waves those with a disability are significantly less likely to be satisfied with the overall experience (82% vs 89% of those without a disability), while those with a caring responsibility are also less likely to be satisfied (84% vs 89% without these responsibilities).

Other groups less likely to be satisfied include those not confident in the eye care they receive (58%), those not confident in managing their own eye health (65%), those who have felt uncomfortable about visiting an opticians/optometrist practice (82%) and those who have had an adverse experience (72% vs. 88% overall).

Those with no vulnerability markers are more likely to feel satisfied with their overall experience (94%) compared to those with at least one marker (84%), especially those with four or more markers (77%). Those who have four or more markers (9%) are more likely than those with none (3%) to say they are dissatisfied with their overall experience.

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 (1599).

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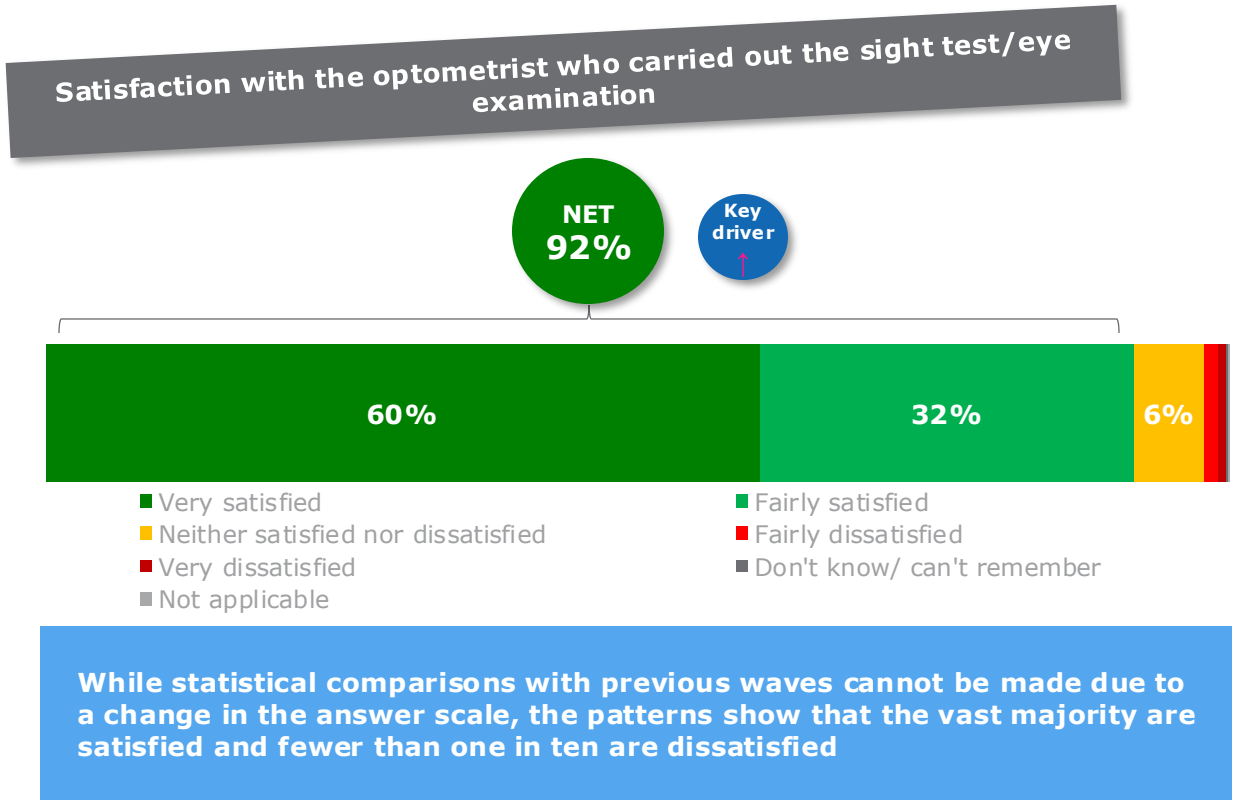
Satisfaction with the optometrist who carried out the sight test/eye examination

Satisfaction with the optometrist is high, with 92% of patients being satisfied or very satisfied with the optometrist. Three in five (60%) say they are very satisfied.



While statistical comparisons with previous waves cannot be made due to a change in the answer scale, the patterns show that the vast majority are satisfied and fewer than one in ten are dissatisfied

Participants aged 65 and over are significantly more likely to be satisfied with their optometrist (96% vs. 92% overall), especially when compared to participants aged 16-24 (84%). White participants are significantly more likely to be satisfied than ethnic minorities (94% vs. 89%). Satisfaction is also significantly higher for those in Northern Ireland (97% vs. 92% overall).

When looking at the results by location of sight test/eye examination, those that visited a high street opticians/optometrist practice are significantly more likely to be satisfied with their optometrist than those who had their test at a hospital facility (93% vs. 85%). Satisfaction is also significantly higher amongst those who are confident in managing their eye care (94% vs. 72% who are not confident), and, intuitively, those who are confident in receiving care from their opticians/optometrist practice (94% vs. 53% who are not confident).

Those with no vulnerability markers (97%) are more likely to be satisfied than those with at least one marker (89%). Those with four or more markers are less likely than average overall to be satisfied (83%).

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 (1599).

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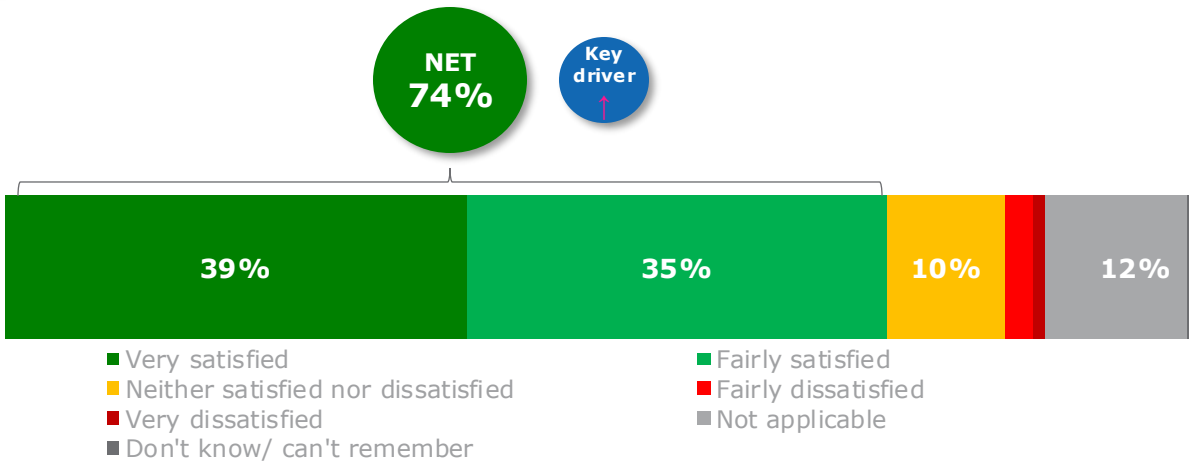
Satisfaction with the experience of buying glasses or contact lenses

Three quarters (74%) are satisfied with their experience of buying glasses or contact lenses, with only 3% reporting to be dissatisfied with the experience. There is a relatively even split between the proportion who are 'very satisfied' (39%) and 'fairly satisfied' (35%).

Satisfaction of the experience of buying glasses or contact lenses



While statistical comparisons with previous waves cannot be made due to a change in the answer scale, the patterns show that the vast majority are satisfied and fewer than one in ten are dissatisfied

Those from a white ethnic background are significantly more likely to be satisfied with their buying experience than those from an ethnic minority background (77% vs 72%). Those whose first language is English are more satisfied than those with another first language (75% vs. 68%).

When looking at working status, those in full time education are the least likely to be satisfied with their experience (61%), compared to those who are working (75%) or retired (76%).

Those in age groups 16-34 and 45-54 (5%) are more likely than those aged 55-64 (1%) to be dissatisfied with the buying experience.

Those who are confident in the eye care they receive are more likely to be satisfied than those who are not (76% vs 44%). In addition, those who report to be confident in managing their own eye health are more likely to be satisfied than those who are not (76% vs 56%).

Those with an eye condition are significantly more likely to be satisfied with the buying experience (79%) than those who do not (72%).

Those with no vulnerability markers are more likely than overall to be satisfied with the experience of buying glasses or contact lenses (77%). Those with at least one vulnerability marker (4%) are more likely than those with none (2%) to be dissatisfied.

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 (1599).

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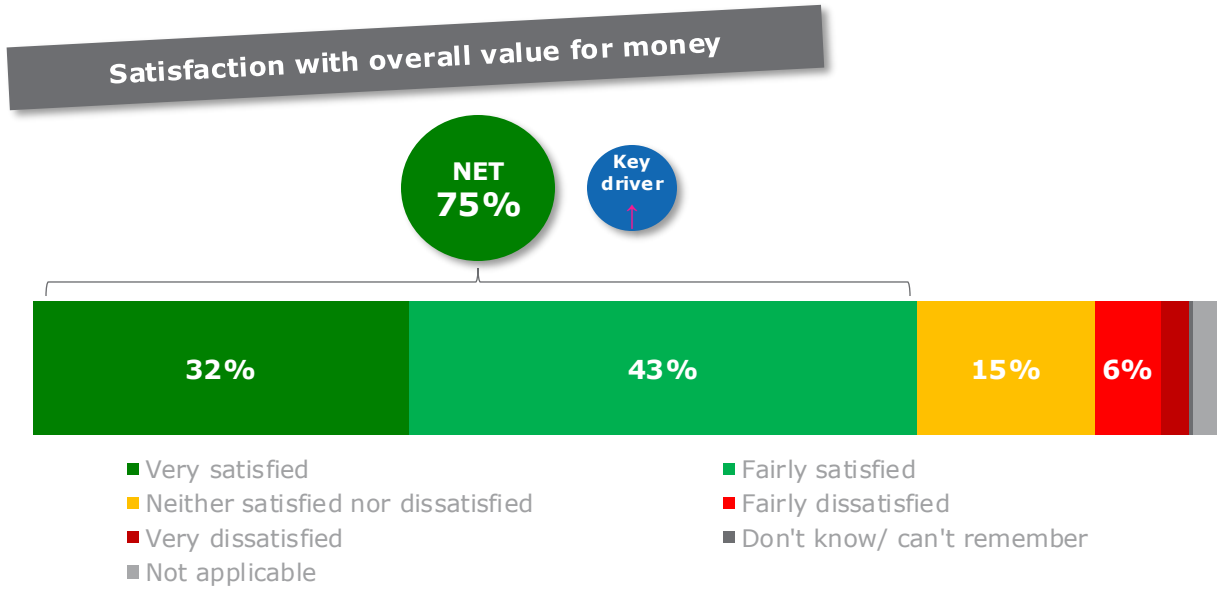
Satisfaction with value for money

Three quarters (75%) are satisfied with the overall value money, though more are 'fairly satisfied' (43%) than 'very satisfied' (32%). Just 8% of customers are dissatisfied.



While statistical comparisons with previous waves cannot be made due to a change in the answer scale, the patterns show that the vast majority are satisfied and fewer than one in five are dissatisfied

Those aged 16-24 are significantly less likely to be satisfied with the overall value for money (63%) than any other age group. Ethnic minorities are also less likely to be satisfied with value for money compared to white participants (71% vs. 77%).

In terms of income, those with a household income of £20,001 - 25,000 are the least likely income band to be satisfied with value for money (65% vs. 75% overall). Those who report that they can't afford essentials are also less likely to be satisfied (69%).

Other groups that are less likely than average to be satisfied with value for money include those in full time education (61%) and those who did not know the price before their appointment (69%).

Those with no vulnerability markers (81%) are more likely than those with at least one marker (71%) to be satisfied with the overall value for money, especially those with four or more markers (66%). Dissatisfaction with value for money is higher for those with at least one vulnerability marker (10%) compared to those with no markers (5%).

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 (1599).

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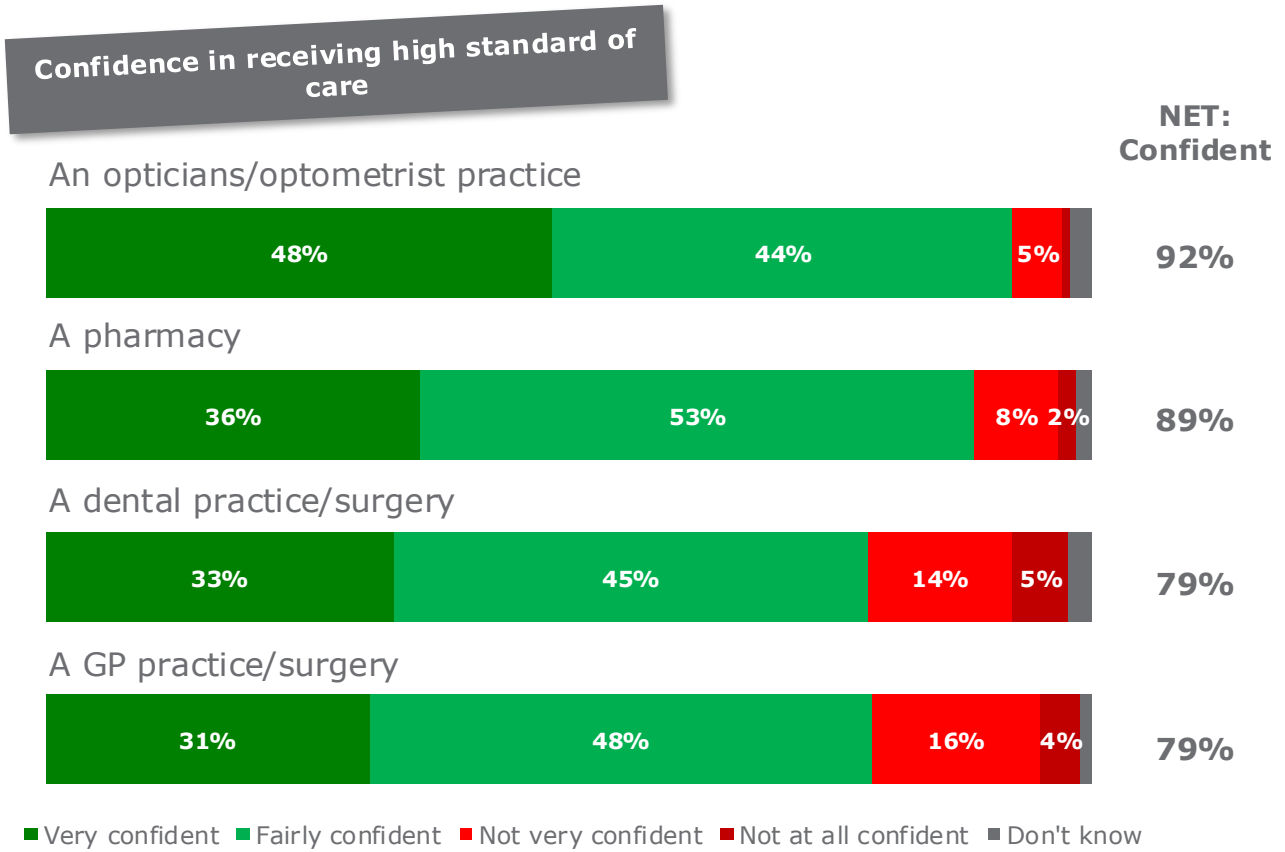
Confidence levels

Confidence in receiving care

Confidence in receiving a high standard of care from an opticians/optometrist practice remains high this year (92%), ahead of others in comparison. It remains in line with the previous year (92% 2023).



When it comes to confidence in receiving a high standard of care from their opticians/optometrist practice, older people aged 65 and over are more likely than average to feel confident (97%), as are those from a white ethnic background (95%). Those in social grades ABC1 (94%), those who are not struggling financially (95%), and those not in work (94%) are also more likely to feel confident in receiving a high standard of care from their opticians/optometrist practice.

Those who feel less confident than overall when it comes to receiving a high standard of care from their opticians/optometrist practice include 16-24-year-olds (8% say they are 'not confident'), those from an Asian background (11%), and non-native English speakers (10%). Those who do not wear glasses or contacts are also more likely to say they are not confident in receiving a high standard of care from their opticians/optometrist practice (9%), as are those who had a sight test/eye examination two or more years ago (12%), and those who had their last sight test/eye examination at a hospital facility (12%).

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 (2035)

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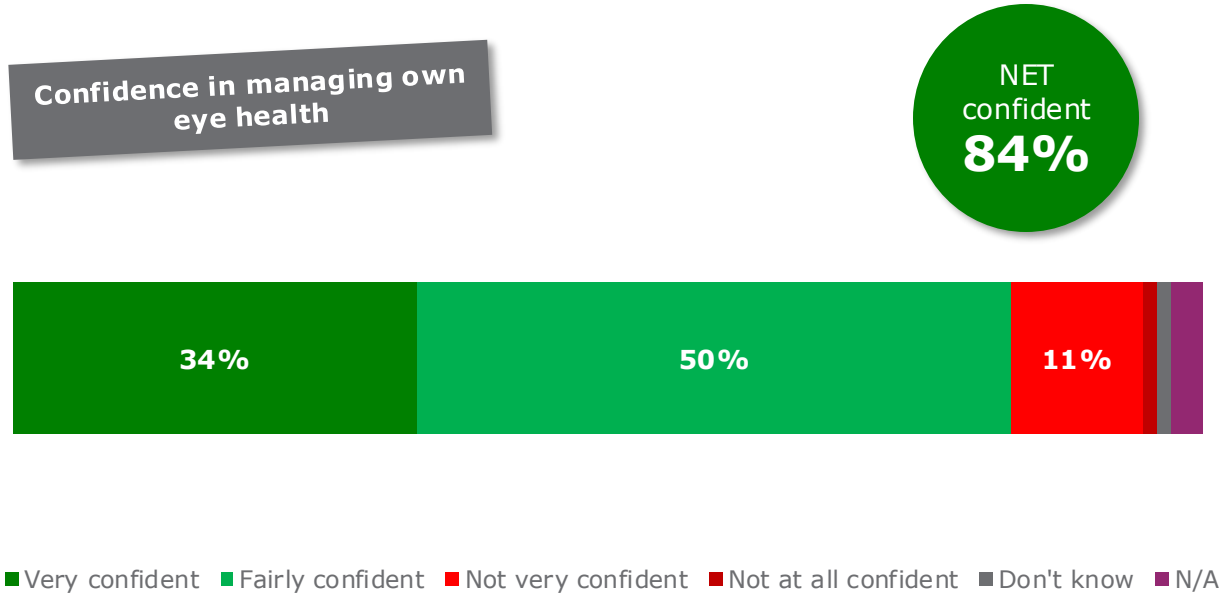
Confidence in managing eye health

New to the survey this year, participants were asked to what extent they are confident, or not, in managing their own eye health. The vast majority feel confident in managing their own eye health (84%), although more feel fairly confident (50%) than very confident (34%). Just over one in ten (12%) do not feel confident in managing their eye health, although fewer say they are not at all confident (1%) rather than not very confident (11%).



Those aged 55 and over are more likely to feel confident in managing their eye health (89%), particularly when compared to 16–24-year-olds (79%). Others who are more likely than average to feel confident in managing their eye health include those living in Wales (87%), those who are not struggling financially (87%), and those who are retired (90%).

Those who are already using glasses (87%) or contacts (89%) are more likely than others to feel confident in managing their eye health. Patients (89%), and those who had their last sight test/eye examination at a high street opticians/optometrist practice (86%) are also more likely to feel confident.

In contrast, those more likely than average say they are not confident include those with a disability (16%), those going through a difficult set of life circumstances (16%), those who are struggling financially (15%), and those in full-time education (21%). Those who do not wear any glasses or contact lenses (19%) are more likely to say they are not confident, as are those who have not had a sight test/eye examination recently (24% of those whose last test was two or more years ago) or at all (26%).

Confidence is higher for those with no vulnerability markers (95%) when compared with those who have at least one marker (77%), especially those who have four or more markers (62%). Those with at least one vulnerability marker (19%) are more likely than those with none (0%) to say they are not confident in managing their own eye health.

S01b. To what extent are you confident or not in managing your eye health? **Base:** All participants (2035)

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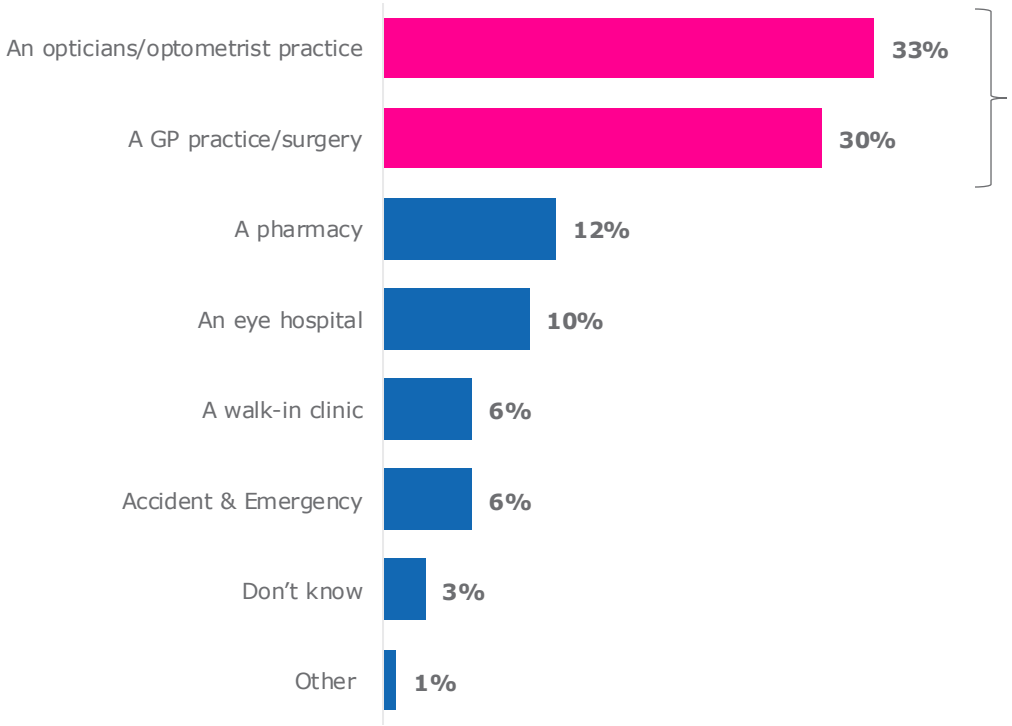
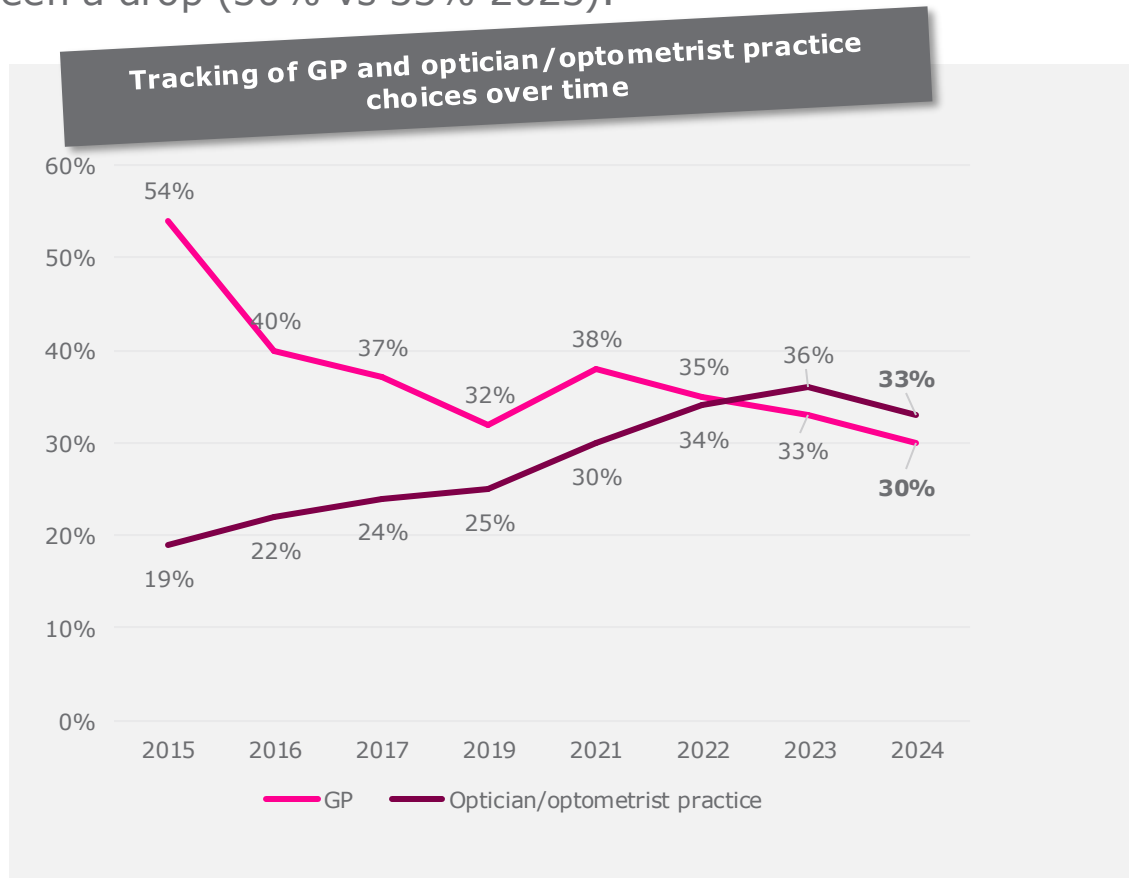
Perceptions of urgent care

First ‘port of call’ for an eye problem

There has been a fall in the proportion of the public who say their first instinct would be to go to an opticians/optometrist practice in the event of an eye problem (33% vs 36% 2023). However, it remains the most popular choice, ahead of a GP practice/surgery, which has also seen a drop (30% vs 33% 2023).

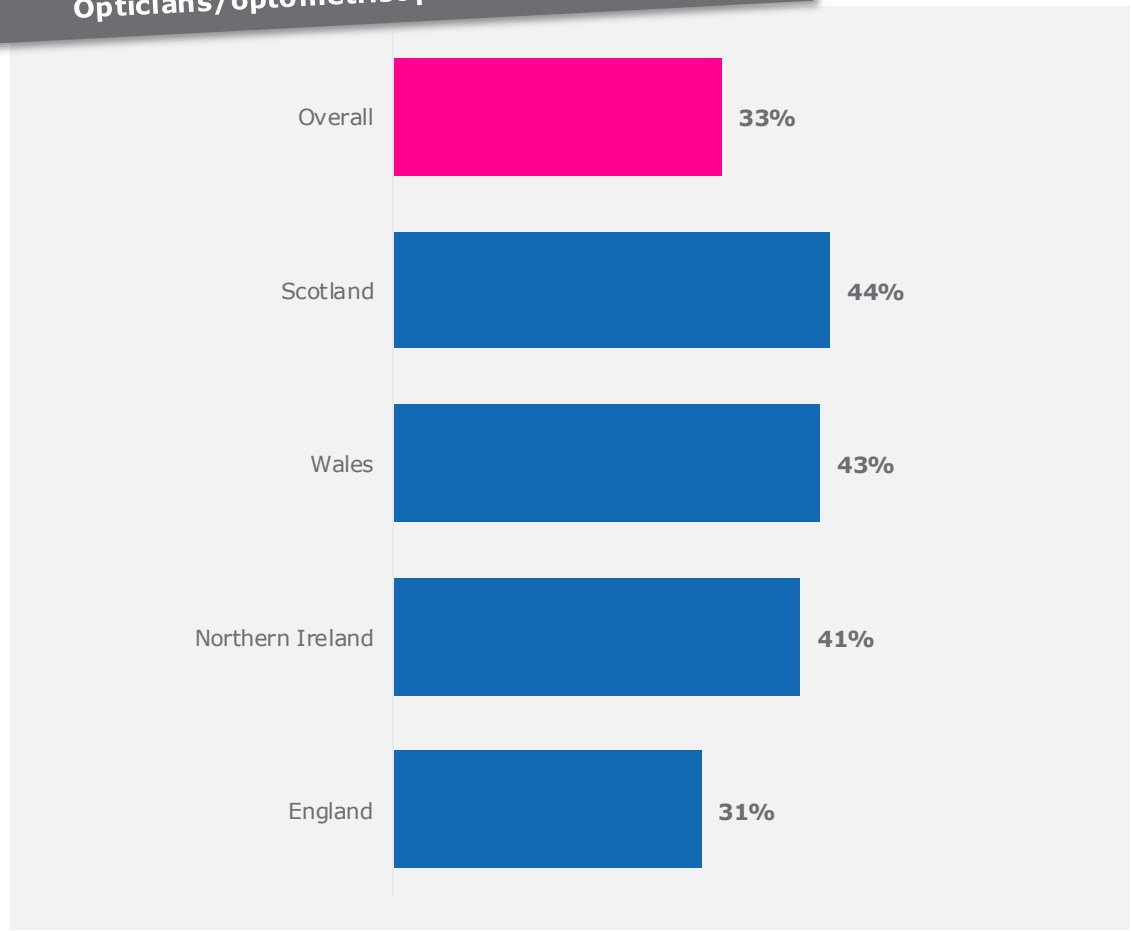




Q01. If you woke up tomorrow with an eye problem, such as something in your eye, a red eye or blurred vision, where would you go or who would you speak to first? **Base:** All participants (2035)

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

Opticians/optometrist practice by nation



Compared to last year, women (33% vs 39% 2023) and those aged 35-44 (26% vs 41% 2023) are less likely to say they would go to an opticians/optometrist practice first if they had an eye problem.

Those aged 65 and over are more likely than younger people aged 16–24 to go to an opticians/optometrist practice first if they had an eye problem (39% vs 27%). Those aged 16–24 are more likely than average to go to an eye hospital as a first port of call for an eye problem (14% vs 10% overall).

Those from a white background (36%) are more likely than overall to go to an opticians/optometrist practice first when compared to ethnic minorities (30%). Ethnic minorities are more likely to go to an eye hospital (14%).

Across the different nations, those in Wales (43%), Scotland (44%), and Northern Ireland (41%) are more likely than those in England (31%) to say they would go to an opticians/optometrist practice first if they had an eye problem.

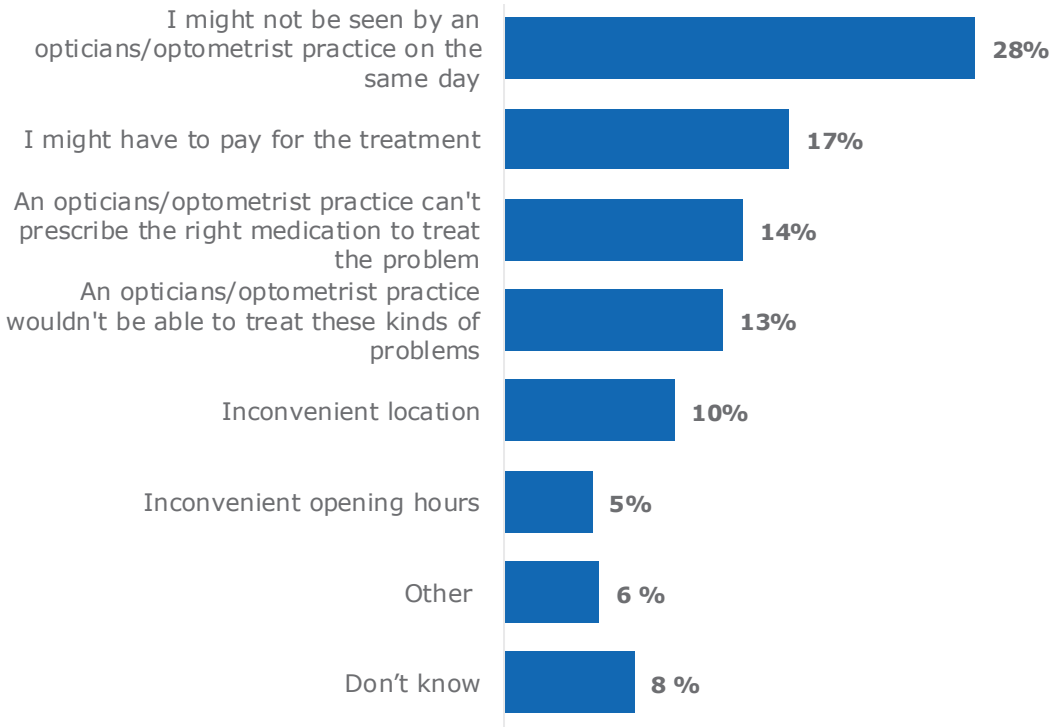
Patients (36%), and those who wear glasses (35%) or contact lenses (42%) are more likely than average to choose an opticians/optometrist practice as their first choice for an eye problem. Those less confident (18%) in managing their eye health are less likely to choose an opticians/optometrist practice first and are more likely to choose a GP practice/surgery (36%). A similar story can be found for those who have either never had a sight test/eye examination, or it was more than two years ago (23% opticians/optometrist practice; 35% GP practice/surgery), as well as those in full time education (23% opticians/optometrist practice; 43% GP practice/surgery).

Those who have no vulnerability markers (38%) are more likely than those who have at least one (30%) to say they would go an opticians/optometrist practice first. Those with at least one vulnerability marker (11%) are more likely than those with none (7%) to say they would go to an eye hospital; this is especially the case for those with four or more markers (16%).

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 (2035)

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

Among those who would not choose to go to an opticians/optometrist practice first, the most cited reason continues to be the chance of not being seen on the same day, up by 4 percentage points since 2023 (28% vs 24%). Having to pay for treatment is also a common reason (17%), as is the perception that an opticians/optometrist practice cannot prescribe the right medication to treat the problem, though this has fallen by 3 percentage points (14% vs 17% in 2023).



Among those who would not choose an opticians/optometrist practice first, women (32%) are more likely than men (23%) to say they might not be seen on the same day, whereas men (16%) are more likely than women (12%) to feel that an opticians/optometrist practice wouldn’t be able to prescribe the right medication. Not being seen on the same day is also a concern among those 65 and over (32%) and those not in work (32%).

Paying for treatment is of particular concern to those aged 16-44 (24%), but less so for those aged 45 and over (10%). Those with an income of £20,001 – £25,000 (22%) and those working part-time (21%) are also more likely than average to be concerned about paying for treatment (22%), as are those who say they cannot afford essentials (25%).

Those who had their last sight test/eye examination in a hospital (26%) are more likely than those who had it at a high street opticians/optometrist practice (15%) to say they have concerns about paying for treatment – perhaps due to a perception that eye conditions will not be covered by the NHS.

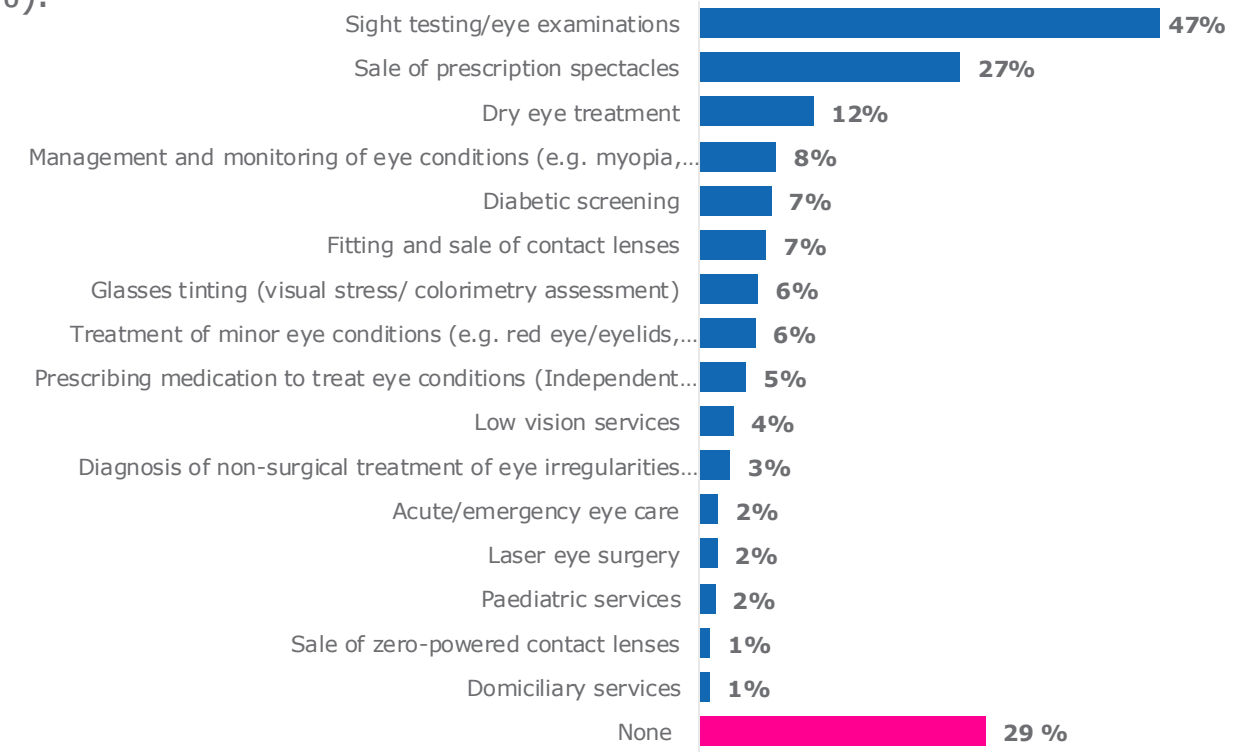
Amongst 45–64-year-olds, there is more of a perception that opticians/optometrists practice would not be able to prescribe the correct medicine for their problems (18%), something that is not shared by those 44 and under (9%).

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 (1309)

Use of optical services

Use of optical services

New to the survey this year, participants were asked if they had used any of the listed optical services in the past two years. Having a sight test/eye examination is the most common service used (47%), followed by sale of prescription glasses (27%) and dry eye treatment (12%). Fewer than one in ten have used any of the other services listed in the survey, while just under three in ten have not used any optical service in the past two years (29%).



Those aged 55 and over are more likely than others to have had a sight test/eye examination (57% vs. 47% overall) and buy prescription glasses (39% vs. 27% overall). For those aged 65 and over specifically, they are more likely than overall to have made use of management and monitoring of eye condition services (14% vs. 8% overall), such as glaucoma and cataract. They are also more likely to have used diabetic screening services (14% vs. 7% overall).

Young people aged 16–34 are more likely to have made use of fitting and sale of contact lenses (11% vs. 7% overall), while those in the youngest age group 16-24 are more likely to have used treatment of minor eye conditions (10% vs. 6% overall) and glasses tinting (11% vs. 6% overall).

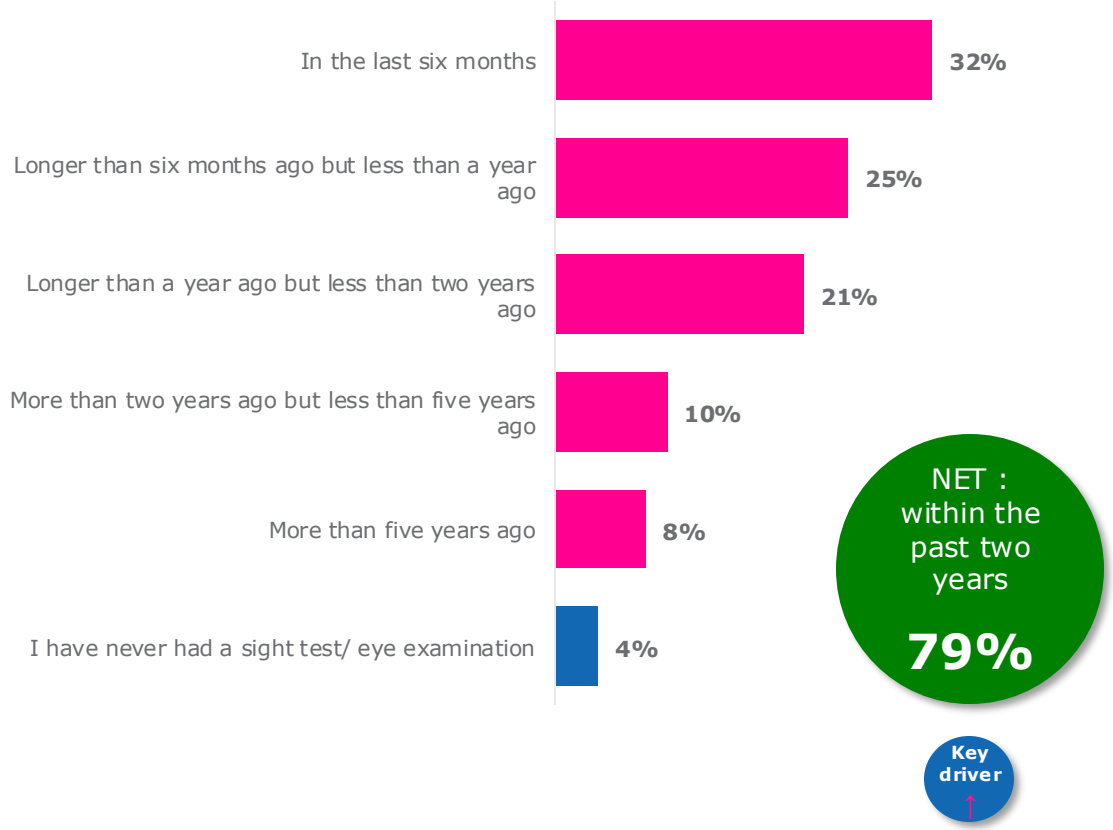
Those who are less confident in managing their eye health are more likely to say they have used none of the different services (39% vs. 29% overall), as are those with low income (33%).

Instinctively, those who report having an eye condition of some kind are more likely than overall to use most of the optical services presented to them. Conversely, those who do not have a condition are more likely to have not used any of the services (37% vs. 29% overall).

Q04d. In the last 2 years, have you used any of the following services? **Base:** All participants (2035)

Last reported visit for sight test/eye examination

Almost four in five say they have had a sight test/eye examination in the past two years, a significant increase compared with two years ago (77% 2023; 74% 2022). Fewer than one in five (17%) say their last test was more than two years ago, while a small proportion (4%) say they have never had one.



Those aged 65 and over are more likely to have had their last sight test/eye examination in the past two years (85% vs. 79% overall), whereas those aged 35-54 are more likely to say they had their sight test/eye examination more than two years ago (21% vs. 17% overall). Those aged 25–44 are also more likely to have never had a sight test/eye examination before (7% vs. 4% overall), as are ethnic minorities (6%).

Those with a low income are more likely to say their last sight test/eye examination was over two years ago (20% vs. 17% overall). 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 (36% vs. 17% overall), or that they have never had one (7% vs. 4% overall).

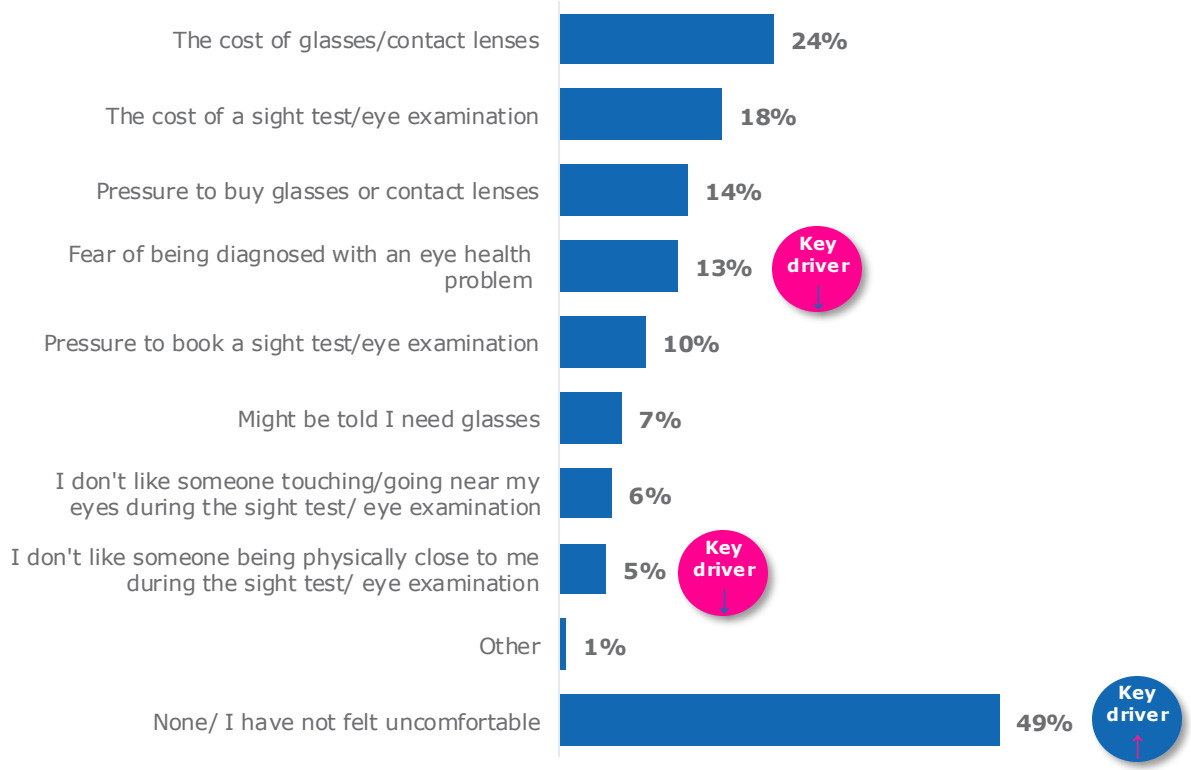
Those who already wear glasses (88%) or contact lenses (92%) are more likely to say they have had a sight test/eye examination in the past two years (vs. 79% overall). The same can be said for those with an existing eye condition (91%). Perhaps unsurprisingly, those who wear neither are comparatively more likely to have never had a sight test/eye examination (15% vs. 4% overall).

Those with no vulnerability markers (82%) are more likely than those with at least one marker (77%) to say they have had a sight test/eye examination in the last two years. Those with four or more markers are the least likely to say they have done so (63%). Those with one or more vulnerability markers (19%) are more likely than those with no markers (15%) to say their last sight test/eye examination was over two years ago, particularly those with four or more markers (33%).

Q04a. When was the last time you had a sight test/eye examination? **Base:** All participants (2035)

Discomfort around visiting at opticians/optometrist practice

The cost of glasses or contact lenses is the most cited reason for feeling uncomfortable about visiting an opticians/optometrist practice (24%). Monetary reasons dominate the other most cited mentions, including the cost of a sight test/eye examination (18%) and pressure to buy glasses or contact lenses (14%), although the latter has fallen since 2023 (18%).



Those aged between 16–44 are significantly more likely to feel uncomfortable due to financial reasons such as the cost of glasses/contacts lenses (30% vs. 24% overall) and the cost of the sight test/eye examination itself (28% vs. 18% overall). They are also more likely to be fearful of being diagnosed with an eye health problem (19% vs. 13% overall) or being told that they need glasses (11% vs. 7% overall). Across all four of these factors, those aged 65 and over are less likely than average to have concerns.

Perhaps due to the availability of free sight tests/eye examinations in Scotland, those living in this nation are significantly less likely than average to cite the cost of sight test/eye examination as a reason (8% vs. 18% overall).

Those from an Asian or black background are significantly more likely to cite the cost of glasses/contact lenses (28% vs. 24% overall) and the sight test/eye examination (25% vs. 18% overall), fear of being diagnosed with an eye health problem (19% vs. 13% overall), and pressure to book a sight test/eye examination (15% vs. 10% overall) as reasons for feeling uncomfortable about visiting an opticians/optometrist practice.

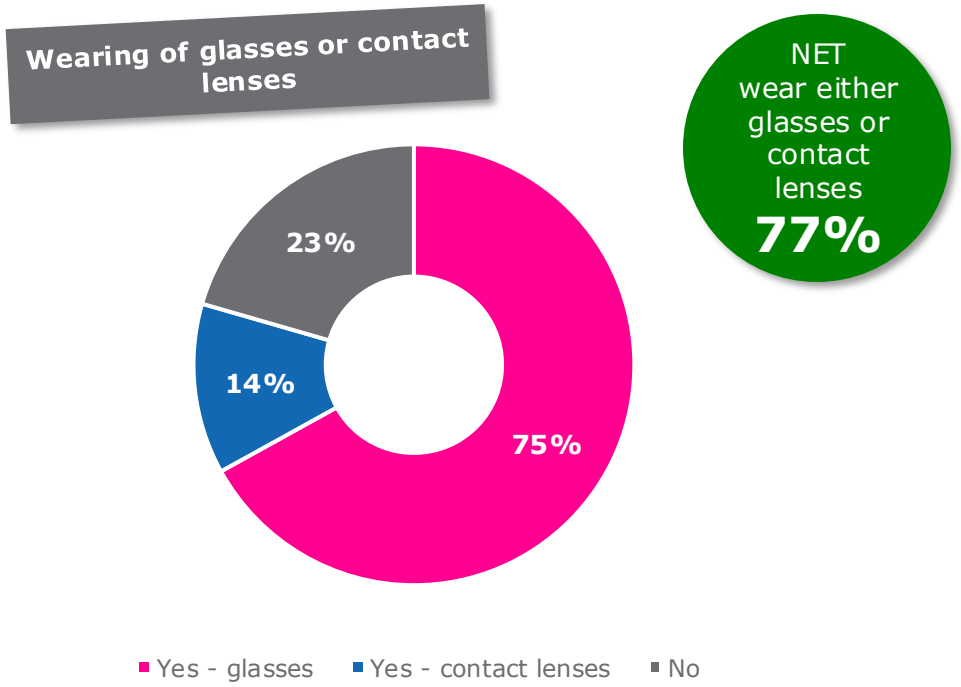
Those who do not speak English as a first language are more likely than native speakers to cite the cost of glasses/contact lenses (34% vs 22%) and sight test/eye examination (31% vs 16%) as reasons for discomfort.

Those not confident in managing their own eye health are more likely to select almost all reasons relating to discomfort, while those who feel confident are more likely to say they have not felt uncomfortable before (52% vs. 49% overall).

Q03. Have you ever felt uncomfortable about visiting an opticians/ optometrist practice for any of the following reasons? **Base:** All participants (2035)

Wearing glasses or contact lenses

The proportion of those wearing glasses, contact lenses, or both remains consistent with the previous year (79%). Three quarters (75%) say they wear glasses, while one in seven (14%) say they wear contact lenses. Just over three quarters (77%) wear both glasses and contact lenses.



Glasses are more likely to be worn by those aged 45 and over (86% vs. 75% overall), while contact lenses are comparatively more popular amongst 16–44-year-olds (21% vs. 14% overall) – the latter age group are also more likely than average to wear neither glasses nor contacts (35% vs. 23% overall).

Those who have a disability are more likely than average to say they wear glasses (79% vs. 75% overall), as are those with an eye condition (84%). Those with low capability and confidence in managing their eye health are more likely to say they wear neither glasses nor contact lenses (35% vs. 23% overall).

Contact lenses are more common amongst those in work, either part time or full time (20% vs. 14% overall). Glasses are more likely to be worn by those not in work (79%) or retired (91% vs. 75% overall).

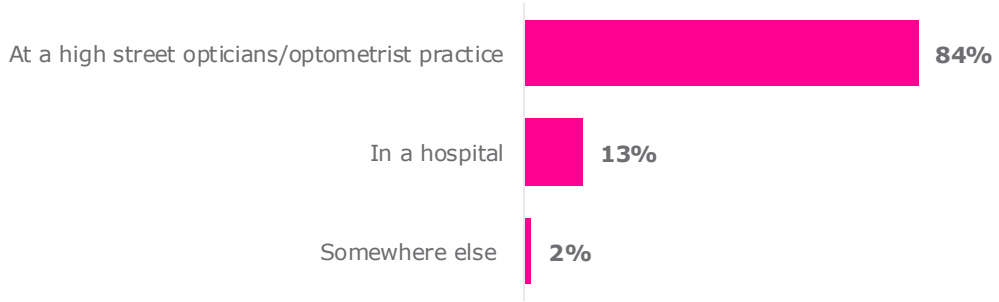
Intuitively, patients are more likely to say they wear either glasses or contact lenses (86% vs. 77% overall), compared to those who had a sight test/eye examination over two years ago (53%) and those who have never had one (6%).

S01c. Do you wear glasses or contact lenses? **Base:** All participants (2035)

Location of test and time of appointment offered

The vast majority of those who have had a sight test/eye examination did so at a high street opticians/optometrist practice, although this has dropped by 4 percentage points this year (84% vs 88% 2023). There are also more this year who say their test was in a hospital (13% vs 8% 2023). New to this wave, participants were asked when they were offered their appointment, and the majority (68%) were offered a timeslot within a week.

Location of sight test/eye examination



Amount of time before appointment offered by location of sight test/eye examination

Time before appointment offered	Hospital	Opticians
On the same day	16%	10%
Within 1-2 days	24%	18%
Within a week	23%	42%
Within two weeks	14%	15%
Within a month	8%	4%
After a month or longer	7%	3%
Don't know / can't remember	9%	8%

Men are more likely than women to say their sight test/eye examination appointment was offered within a week (72% vs 65%), as are those aged 16–24 (75% vs. 68% overall).

There are few differences by nation, although those in Scotland are less likely than average to say they were offered an appointment within a week (63% vs. 68% overall).

Those in full-time education are more likely to say their appointment was offered after a month or longer (7%).

When comparing wait times between high street opticians/optometrist practices and hospitals, those who were seen in a hospital are more likely than those who were seen in a high street optician/optometrist practice to say their sight test/eye examination was offered on the same day (16% vs. 10%), within two days (24% vs. 18%), within a month (8% vs. 4%), or after a month or longer (7% vs. 3%). Those seen at a high street opticians/optometrist practice on the other hand are more likely than those who were seen at a hospital to say their sight test/eye examination was offered within a week (42% vs. 23%).

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 (1963). **Q04c**. Thinking about your last routine sight test/eye examination, how long did it take before you were offered an appointment? **Base:** All participants who have had a sight test/eye examination (1963).

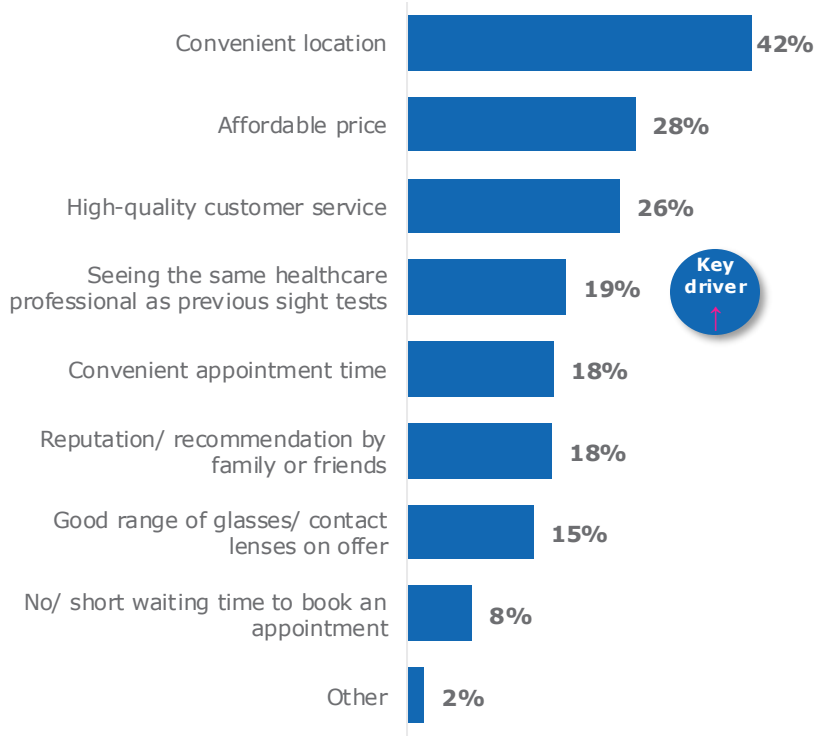
Green text denotes sub-group statistic being significantly more likely than overall. Red text denotes sub-group statistic being significantly less likely than overall.

Choosing the opticians/optometrist practice

Three in ten (31%) say they shopped around before selecting which optician/optometrist practice to go to, significantly higher than the equivalent figure in 2023 (21%). The top factor for choosing an opticians/optometrist practice is a convenient location (42%). Affordable prices (28%) and high-quality customer care (26%) follow, both of which are significantly higher than the previous wave (21% and 19% respectively).

31%

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



Likelihood to shop around is significantly lower amongst older participants, those aged 55-64 (16%) or 65+ (17%), compared with those aged 16-24 (47%), 25-34 (48%) or 35–44 (42%). Those who say they are struggling financially are significantly more likely to say they shopped around compared with those who are not (36% and 26% respectively). Those with an eye condition (43%) are also more likely to shop around than those without an eye condition (26%); this is also true for those who have previously felt uncomfortable about visiting an opticians/optometrist practice (44%).

Those who have shopped around are significantly more likely to report affordable prices as a top factor in deciding which opticians/optometrist practice to use (40% vs. 28% overall).

Those who have no vulnerability markers (27%) are less likely than those with at least one marker (34%) to say they shopped around.

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 a eye sight test/eye examination in the past two years (1599). **Q06.** What was the top factor in choosing your opticians/ optometrist practice for the sight test/eye examination? **Base:** All participants who have had a sight test/eye examination in the last two years (1599).

Choosing the opticians/optometrist practice

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31%

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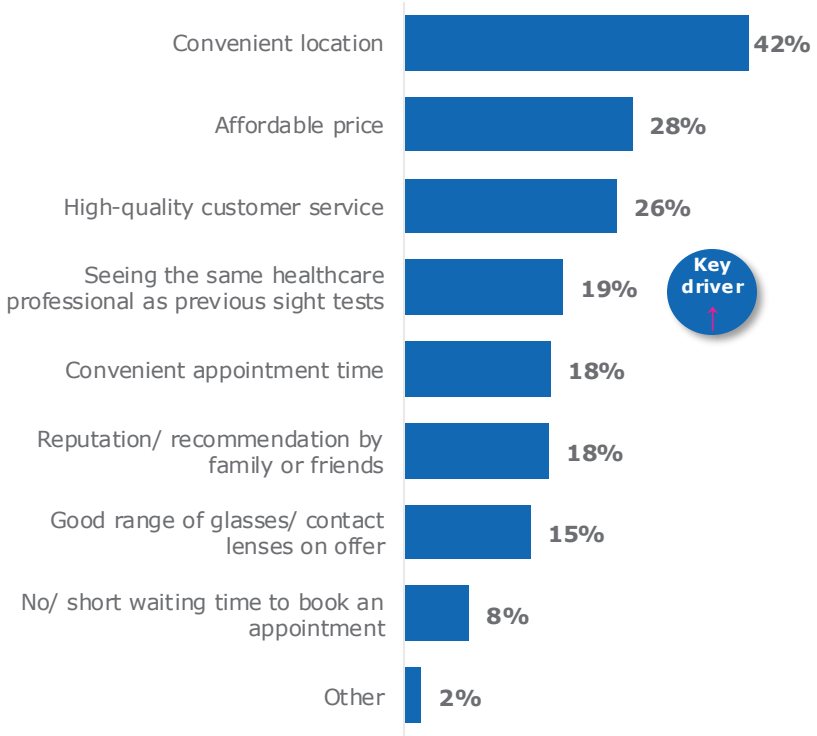

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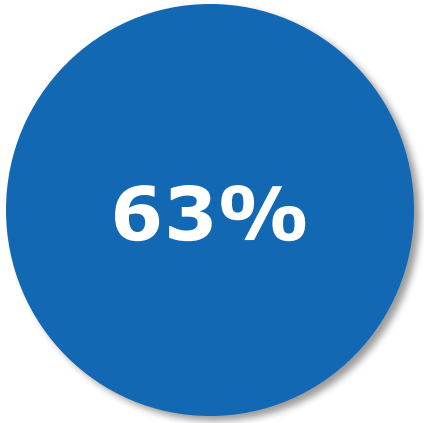
Those who have shopped around are significantly more likely to report affordable prices as a top factor in deciding which opticians/optometrist practice to use (40% vs. 28% overall).

Those who have no vulnerability markers (27%) are less likely than those with at least one marker (34%) to say they shopped around.

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 a eye sight test/eye examination in the past two years (1599). **Q06.** What was the top factor in choosing your opticians/ optometrist practice for the sight test/eye examination? **Base:** All participants who have had a sight test/eye examination in the last two years (1599).

Knowledge of prices before attending appointment

Just over six in ten (63%) say they knew the price of the sight test/eye examination before their appointment. This was significantly less than in 2023, when over seven in ten (72%) of participants reported knowing the price in advance of their test.



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

Those aged 65 and over are significantly more likely to say they knew the price before their sight test/eye examination (75%) than any other age group (16-24 55%, 25-34 57%, 35-44 60%, 45-54 63% and 55-64 63%).

Those in social grades ABC1 are significantly more likely to say they knew the price compared with those in C2DE social grades (65% vs 58% respectively). Similarly, those who are not struggling financially are significantly more likely to say they knew the price before their appointment than those who report to be struggling financially (68% vs 59% respectively). This is perhaps of concern as the group most in need of reassurance around costs appears to have the lowest awareness.

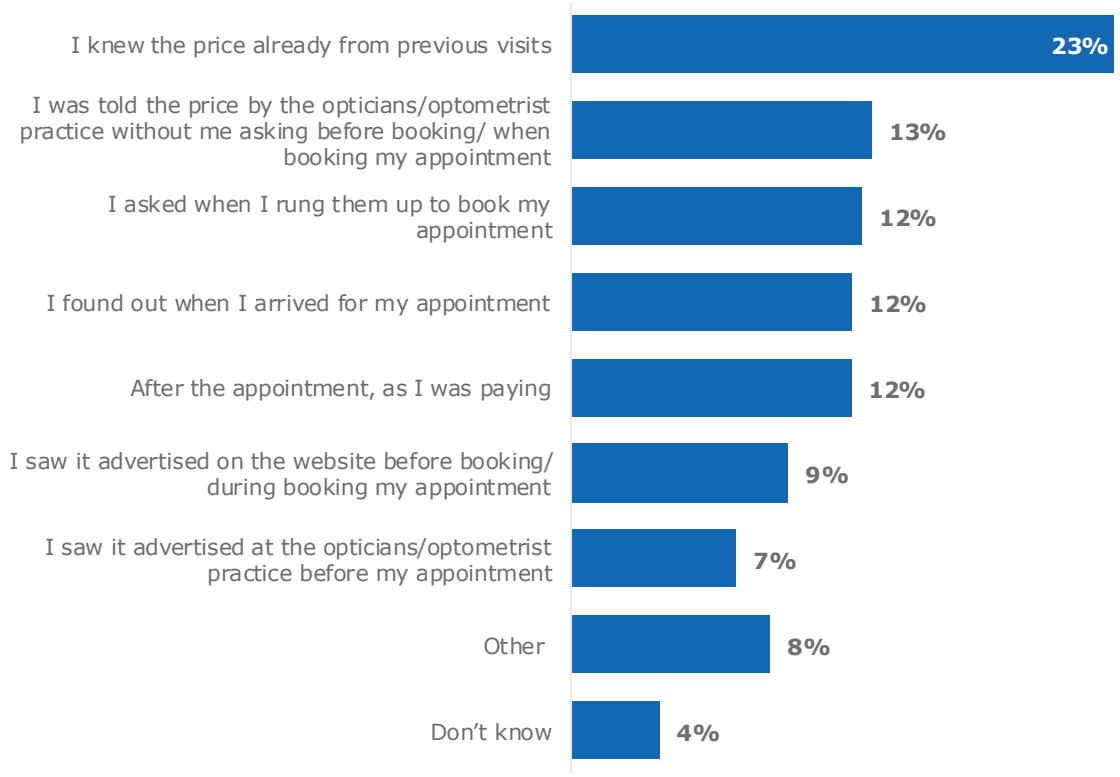
As expected, those who say that they shopped around before their appointment are more likely to say that they knew the price compared with those who did not (65% vs 54% respectively).

In addition, those who had their sight test/eye examination at a high street opticians/optometrist practice are marginally more likely to say they knew the price (65%) compared with the overall average (63%).

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 (1599).

Source of price information

When asked how they first found out what the price of the sight test/eye examination would be, around a quarter (23%) report already knowing this information from previous visits, however this has seen a downward trend since the previous wave in 2023 (30%).



Patients in the last 6 months are significantly more likely to say they knew the price from their previous visits (28%) compared with patients who had a sight test/eye examination 6-12 months ago (21%) or 1-2 years ago (17%).

Those in Northern Ireland are more likely to say they would find out the price as they were paying (22%).

Those aged 65 or over are significantly more likely to cite knowing the price from previous visits (37%) than any other age group.

Female participants are significantly more likely than male participants to say they asked for the price when booking the appointment (14% vs 10% respectively). Yet, male participants are significantly more likely to say they saw the price advertised on the website before or during booking the appointment (11% vs. 8% of females).

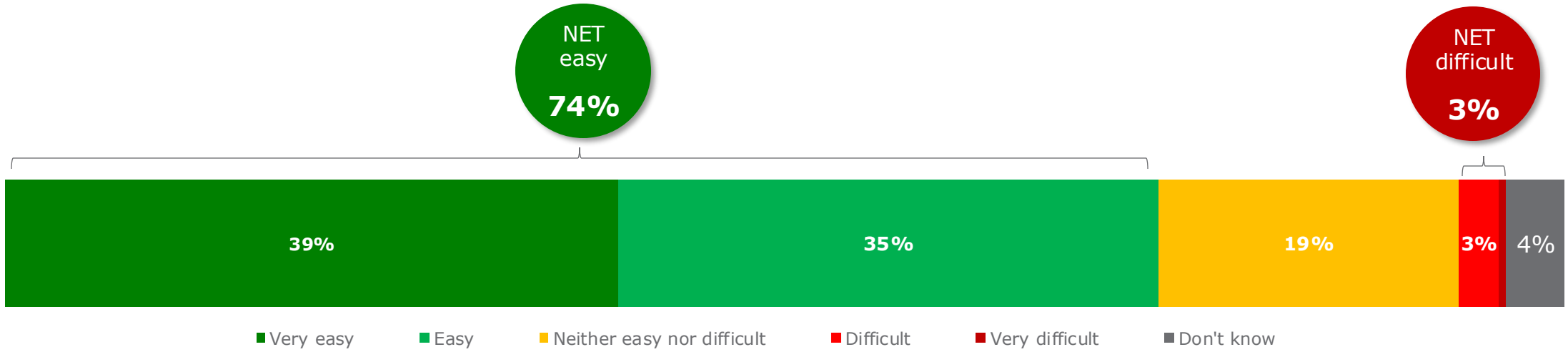
Ethnic minority participants are significantly less likely than white participants to say they already knew the price from a previous visit (17% vs 28% respectively). They are also more likely to say they were told the price after the appointment when paying (15% vs. 9% of white participants) or that they asked when booking the appointment (14% vs. 11%).

Those who had their sight test/eye examination in a hospital facility are significantly more likely to have found out the price when they arrived (16%) than those who went to a high street opticians/optometrist practice (11%). Those who went to a high street opticians/optometrist practice are more likely to know the price from a previous visit (24%) than those who went to a hospital facility.

Q08. How did you first find out what the price of the sight test/eye examination would be? **Base:** All participants who have had a sight test/eye examination in the last two years (1599).

Ease of sourcing price information

Three quarters (74%) say they found it very easy or easy to find out the price of their last sight test/eye examination, in line with the previous wave in 2023 (75%). Only 3% say they found it difficult to find out the price.



Those aged 65 or over are significantly more likely to say they found very easy or easy to find out the price of their sight test/eye examination (81%) than any other age group.

Participants who are confident in receiving care from an opticians/optometrist practice (75%) and confident in managing their eye care (76%) are both significantly more likely to have found it very easy or easy to find out the price, compared with those who are not confident (49% and 56% respectively).

Those who had their sight test/eye examination at a hospital facility are more likely to have found it difficult to find out the price of a test (5%) than those who had their sight test/eye examination at a high street opticians/optometrist practice (2%).

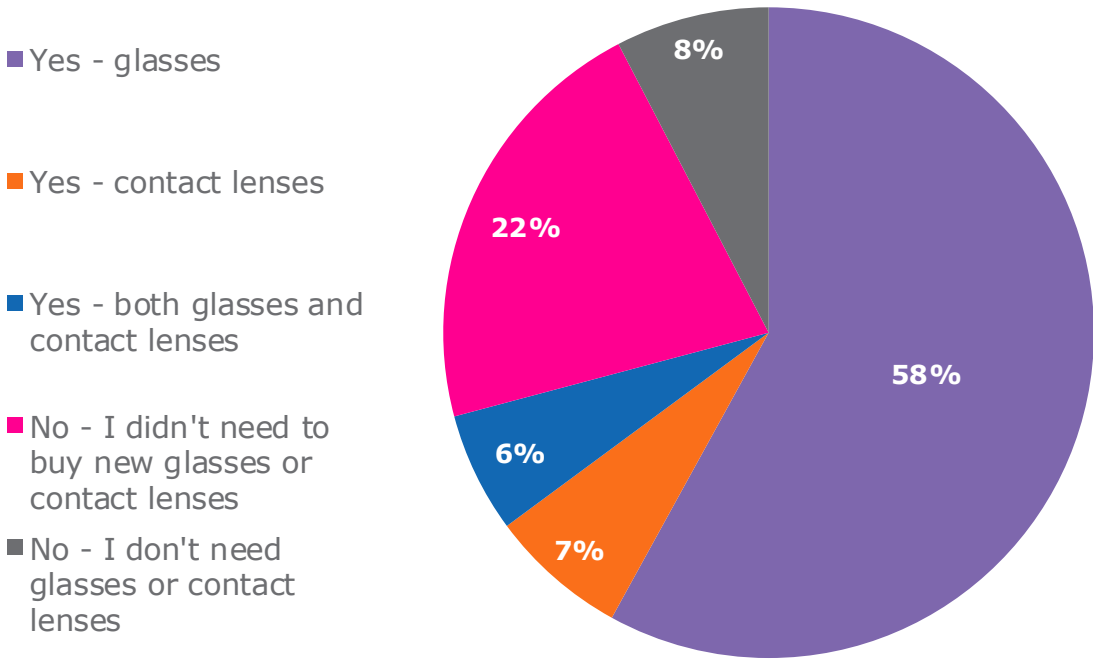
Q09. Overall, how easy, or difficult was it to find out the price of your last sight test/eye examination? **Base:** All participants who have had a sight test/eye examination in the last two years (1599).

Chart is missing figures due to small proportions and spacing

Purchasing eyewear

Purchase of glasses or contact lenses

Three in five (58%) purchased glasses as a result of their sight test/eye examination. This was higher than the proportion of those who purchased contact lenses (7%) or both glasses and contact lenses (6%).



Those aged 45-54 (66%), 55-64 (64%) and 65 and over (61%) are significantly more likely to have purchased glasses after their appointment than younger participants, aged 16-24 (52%), 25-34 (49%) or 35-44 (52%). However, younger participants are significantly more likely to have purchased contact lenses (16-24 11%, 25-34 12% and 35-44 12%) than older participants (45-54 5%, 55-64 3% and 65 and over 1%).

Participants aged 16-44 are also more likely to purchase both glasses and contact lenses after their sight test/eye examination (10% vs. 6% overall).

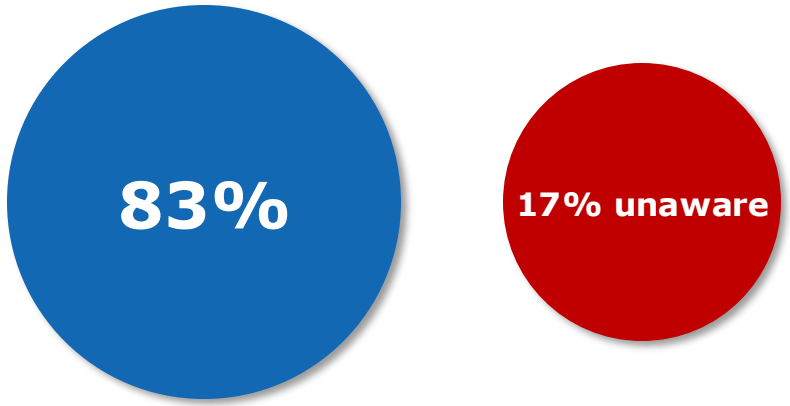
Those who had their sight test/eye examination performed at a high street opticians/optometrist practice are significantly more likely to have purchased glasses as a result of their sight test/eye examination (62% vs. 58% overall). However, those whose sight test/eye examination was performed at a hospital facility are significantly more likely to have purchased contact lenses (13% vs. 7% overall) or both glasses and contacts (12% vs. 6% overall).

Male participants (26%), white participants (25%), those aged 65 and over (33%), those not in work (28%) and participants living in Wales (31%) are all more likely than average to say they did not need to purchase glasses or contact lenses after their appointment (vs. 22% overall).

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 (1599).

Awareness of being able to purchase elsewhere

Over four in five (83%) are aware that it is possible to buy glasses or contact lenses from a different opticians/optometrist practice to where the sight test/eye examination or contact lens fitting took place. This remains in line with the previous wave (85%).



… are aware that it's possible to buy their glasses or contact lenses from a different opticians/optometrist practice from where the sight test/eye examination/contact lens fitting took place…

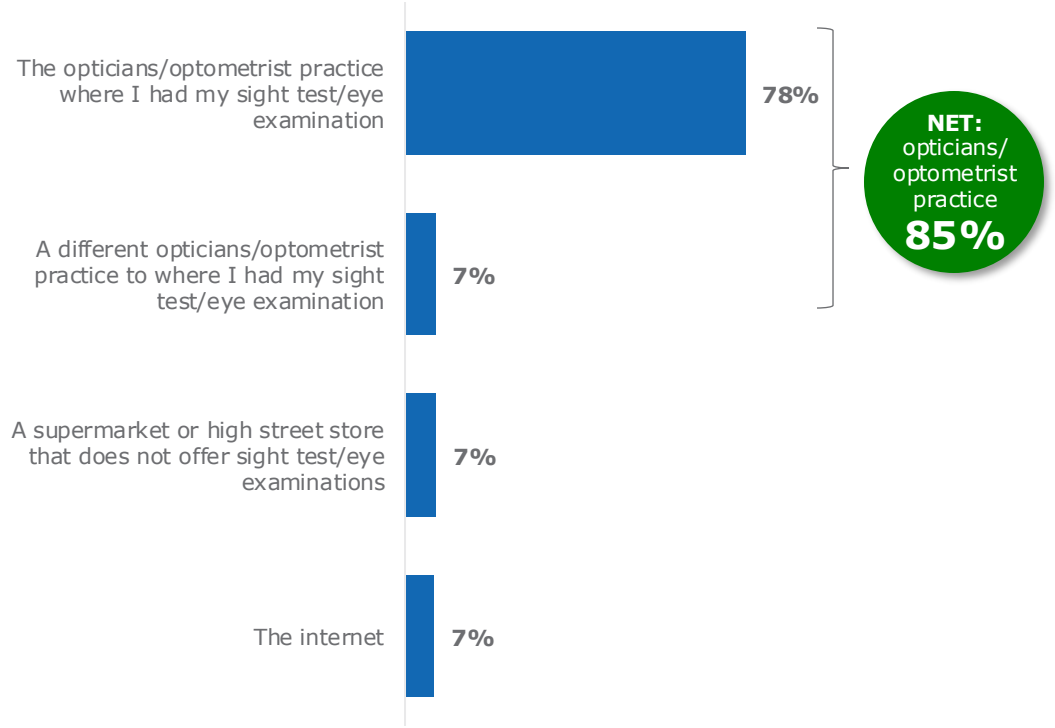
Those aged 65 and over are more likely to be aware that it is possible to purchase from elsewhere (94% vs. 83% overall), particularly when compared to 16–24-year-olds (70%) and 25–34-year-olds (75%). Others who are more likely to be aware they can purchase from elsewhere include white participants (94%), those who are not struggling financially (87%), those who report English being their first language (85%) and those who earn over £50,001 (88%).

In addition, those who knew the price of their sight test/eye examination before their appointment are significantly more likely to be aware they could purchase elsewhere (88%) than those who did not now the price before (74%).

Q011. Are you aware that you can buy your glasses or contact lenses from a different opticians/ optometrist practice than where you had your sight test/eye examination/ contact lens fitting? **Base:** All participants who have had a sight test/eye examination in the last two years (1599)

Source of glasses purchase

Amongst those who purchased glasses as a result of their sight test/eye examination, the majority purchased them from the opticians/optometrist practice where they had their sight test/eye examination (78%). This has seen a downward trend since the previous wave in 2023 (85%). The proportion who purchased their glasses from a supermarket or high street (7%) or the internet (7%) is significantly higher than the previous wave (1% and 4% respectively).



Those aged 55-64 (85%) and 65 and over (89%) are significantly more likely to have purchased their glasses from the opticians/optometrist practice where they had their sight test/eye examination (vs. 78% overall). By contrast, younger participants aged 16-34 are more likely than average to purchase glasses from a different opticians/optometrist practice than where they had their sight test/eye examination (11%) or from a supermarket or high street (13%).

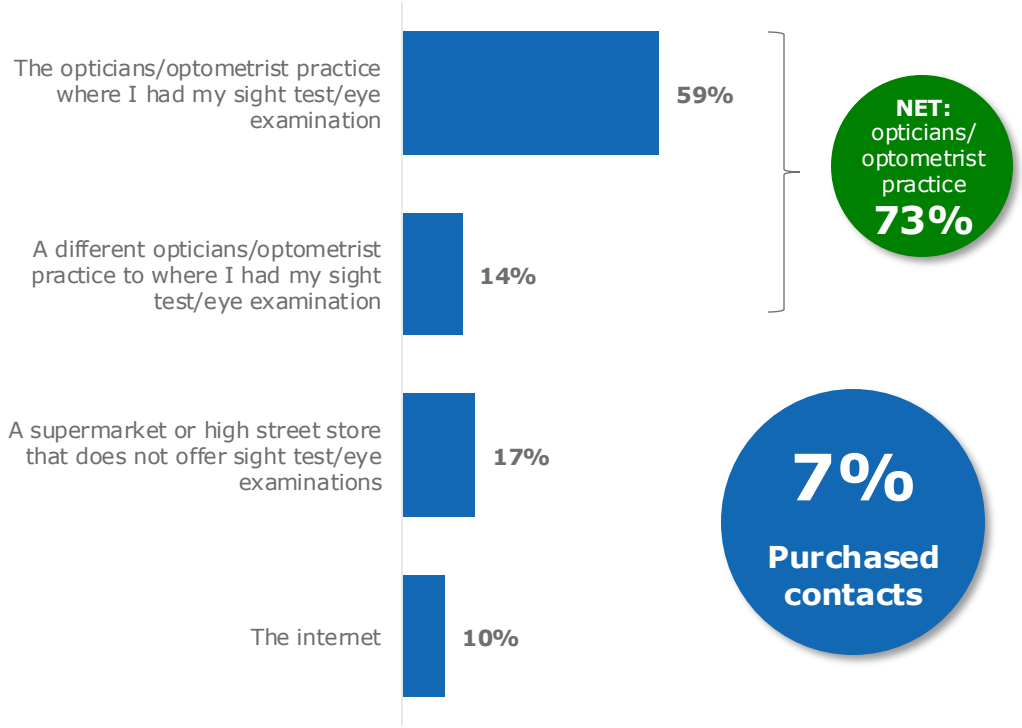
White participants are significantly more likely than ethnic minorities to have purchased their glasses from the same opticians/optometrist practice they had their sight test/eye examination at (84% vs. 70%). However, ethnic minority participants are significantly more likely to have purchased their glasses from a different opticians/optometrist practice (9%), a supermarket or high street (10%) or the internet (9%) than white participants (4%, 4%, 3% respectively).

Those who shopped around for their sight test/eye examination are significantly more likely to have purchased their glasses from a different optician/optometrist practice (14%), a supermarket or high street (14%) or the internet (10%).

Q012. Where did you purchase your glasses from? **Base:** All participants who purchased glasses (1013).

Source of contact lenses purchase

Most participants who purchased contact lenses as a result of their appointment did so from the opticians/optometrist practice where they had their sight test/eye examination (59%). Those who purchased contact lenses are significantly more likely to purchase from a supermarket or high street (17%) or a different opticians/optometrist practice to where they had their sight test/eye examination (14%) than those who purchased glasses (7% and 7% respectively).



White participants are significantly more likely to purchase contact lenses from where they had their sight test/eye examination (69%) compared to ethnic minorities (51%). Scottish participants are significantly more likely than those in England to purchase their contact lenses from the internet (29% vs 9%).

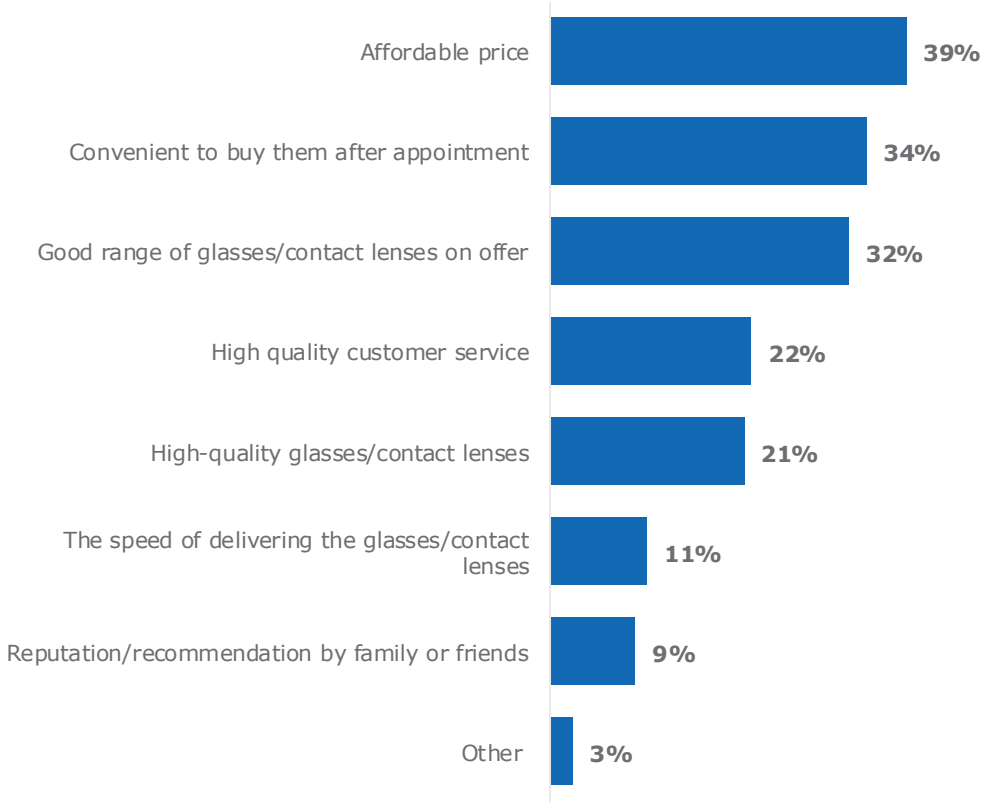
Those with a disability are significantly less likely than those without a disability to purchase their contact lenses from the opticians/optometrist practice where they had their sight test/eye examination (38% vs 68%), however, they are more likely to purchase their contact lenses from a supermarket or high street store (33% vs 12%). In addition, those with a caring responsibility are also less likely than those without such responsibility to purchase from the same opticians/optometrist practice where they had their sight test/eye examination (42% vs 66%). In contrast, carers are more likely to purchase from a different opticians/optometrist practice (23%) or the internet (17%) compared with those without a caring responsibility (10% and 7% respectively).

Those who shopped around are significantly more likely than those who do not to purchase their contact lenses from a supermarket or high street (23% vs 10%), or a different opticians to where they had their sight test/eye examination (22% vs 6%). Those who do not shop around are more likely to purchase from the same opticians/optometrist practice (72%) compared to those who do shop around (47%). Those who report not being able to afford essentials are significantly less likely than average to purchase contact lenses from the same opticians/optometrist practice as their sight test/eye examination (42%).

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

Reason given for purchase location

Across glasses and contact lens wearers, affordability is the most important factor when deciding where to make a purchase (cited by 39%). This is followed by the convenience of buying them directly after an appointment (34%) and the range of glasses or contact lenses on offer (32%).



Affordability is given higher priority amongst C2DE social grades (45%) and those with a household income of less than £20,000 (46%).

Convenience is a more important factor than average amongst those aged 55-64 (41%) and 65+ (46%), white participants (40%), those living in Wales (46%) and ABC1 social grades (36%).

The **range of products is** more of a consideration for those aged 55+ (36%) and white participants (35%).

Customer service is given higher priority by male participants (25% vs. 20% of females), those with a disability (27%), those with a household income of £35,000+ (26%) and those with an eye condition (27%).

The **quality of the products** is more of a consideration for 16-24s (30%) and 25-34s (29%), ethnic minority participants (25%), those with a disability (26%), those in work (25%) and contact lens wearers (30%).

Speed of delivery is comparatively more important for 16-24s (16%).

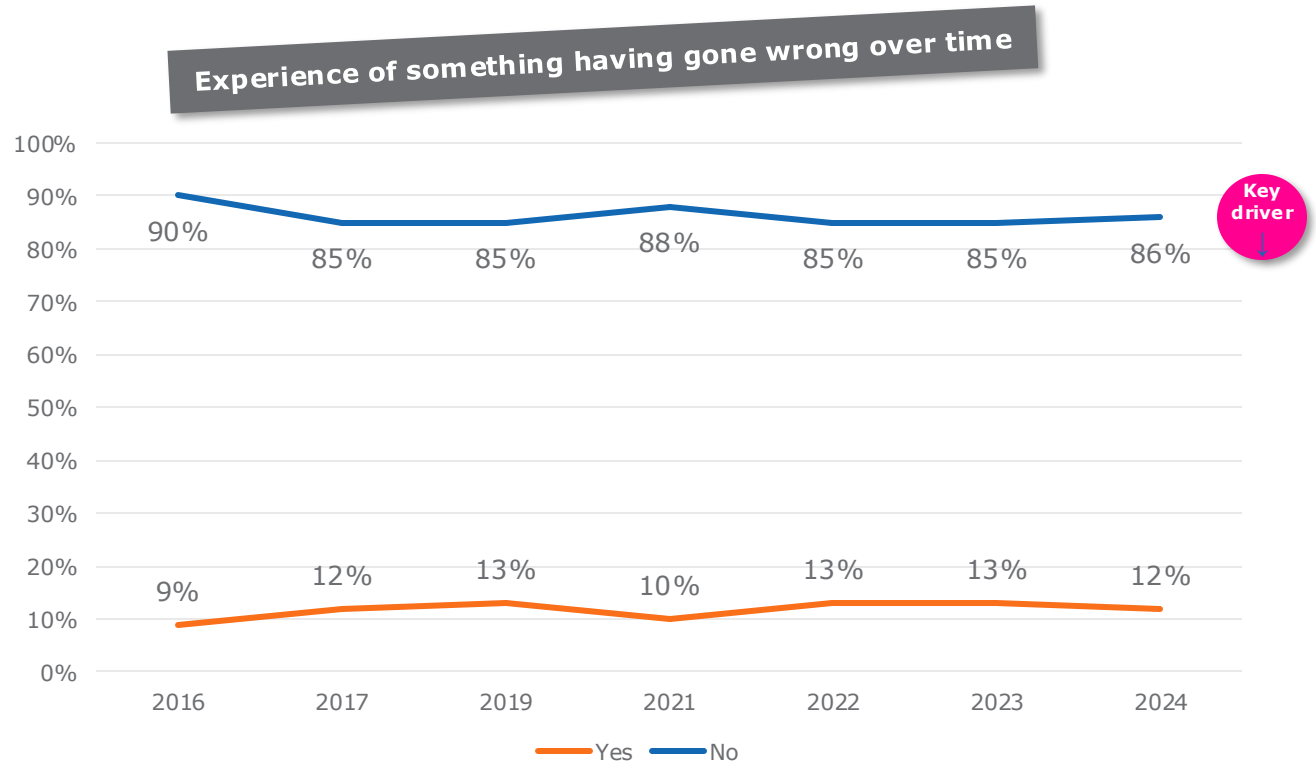
Reputation or a **recommendation from friend/family** is more important amongst 16-24s (14%), 25-34s (15%), ethnic minorities (13%), carers (17%) and those who cannot afford essentials (18%).

Q014. What was your main motivation for buying your glasses/ contact lenses/ glasses and contact lenses from…? **Base:** All participants who have purchases glasses OR contact lenses (1119)

Poor experiences and complaints

Poor experiences

One in eight (12%) have experienced a situation where something goes wrong with the care or service they received at an opticians/optometrist practice; this is in line with previous waves.



Demographic groups who are more likely than average to have experienced something going wrong include:

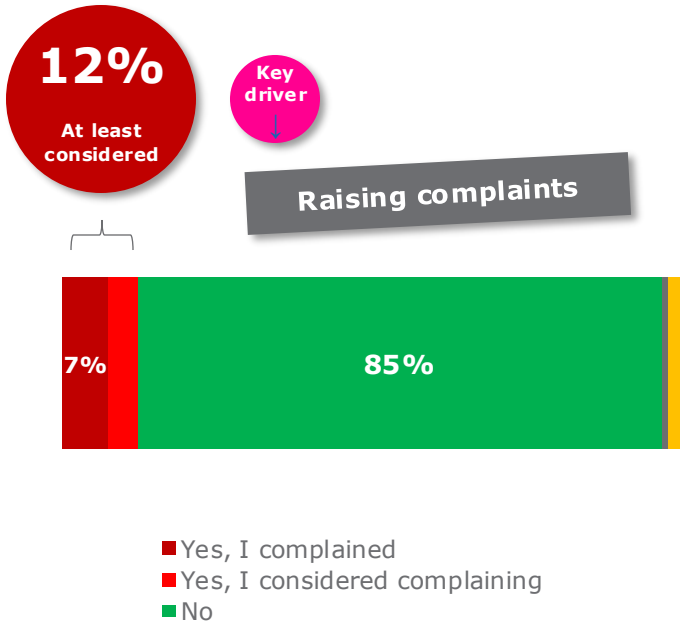
- Those with a disability (30%)
- Carers (24%)
- 16-24s (20%)
- Those with an eye condition (19%)
- Those who wear contact lenses (17%); and
- Those going through a difficult set of life circumstances (16%).

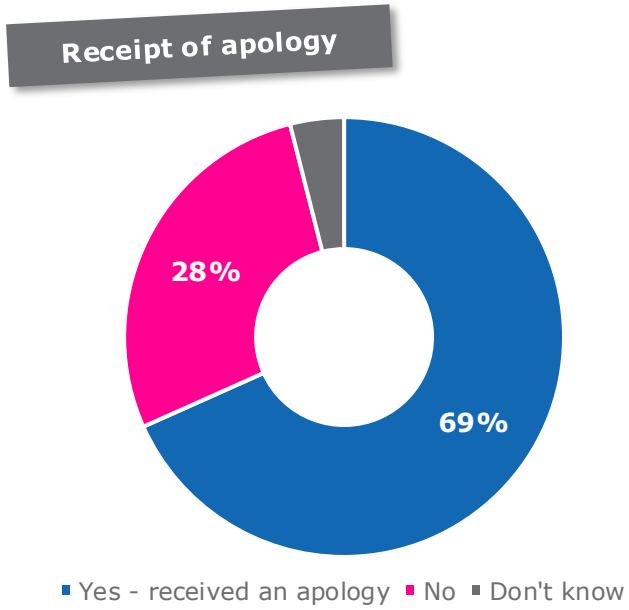
Those with at least one vulnerability marker are more likely than those who have none to say they had a situation where something went wrong (13% vs. 9%).

Q015. Have you ever experienced a situation where something has gone wrong with the care/service you received when visiting an opticians/ optometrist practice? **Base:** All participants who visited an opticians/ optometrists practice on their last sight test/eye examination (1667)

Raising complaints and receipt of apology

Fewer than one in ten (7%) say they complained about an experience when visiting an opticians/optometrist practice, though a further 5% considered complaining, in line with previous waves. Over two thirds (69%) received an apology after complaining.





Active complaint levels are higher than average amongst:

- Those with a disability (18%)
- Carers (15%); and
- Those with an eye condition (11%).

Those more likely to have at least considered complaining include:

- 16–34s (19%); and
- Those going through a difficult life circumstance (18%).

Those with at least one vulnerability marker are more likely than those who have none to say they complained (8% vs. 6%).

Around half of those who report having had an adverse experience say they made a complaint (48%), with a further one in five (20%) saying they considered complaining.

Complaint levels are broadly in line with those seen in recent waves – 8% in 2023, and 6% in 2022.

Due to changes in the questionnaire this wave, trend data for receipt of apology is not directly comparable to previous waves.

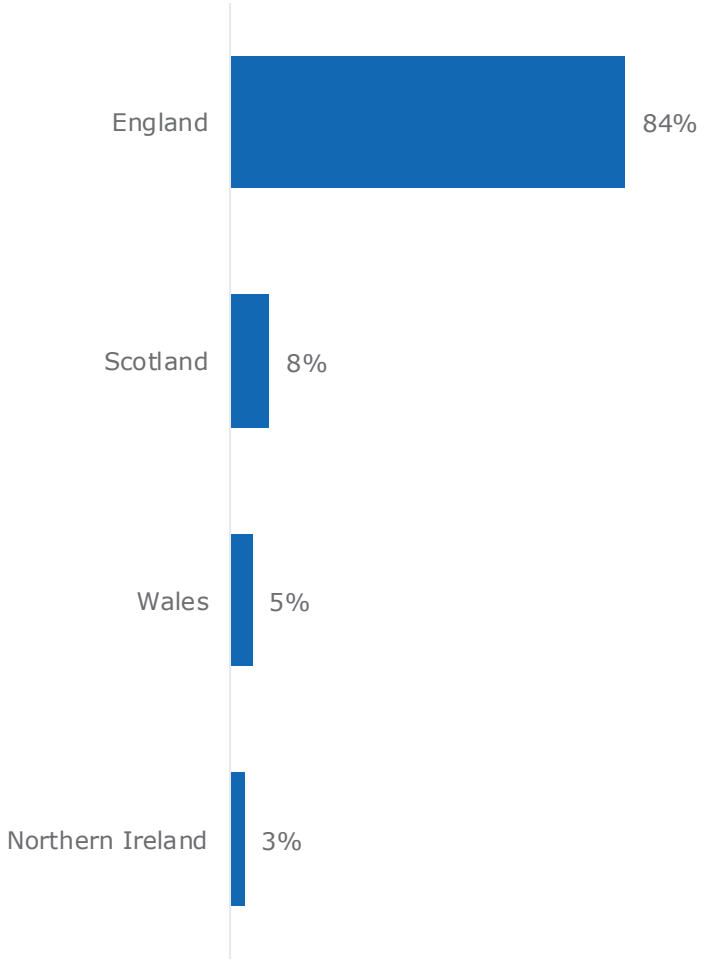
Q016. Have you ever complained or considered complaining about an experience when visiting an opticians/ optometrist practice? **Base:** All participants who visited an opticians/ optometrist practice on their last sight test/eye examination (1667). **Q017.** Did you receive an apology from the opticians/ optometrist practice as a result? **Base:** All participants who complained (114)

Chart is missing figures due to small proportions and spacing

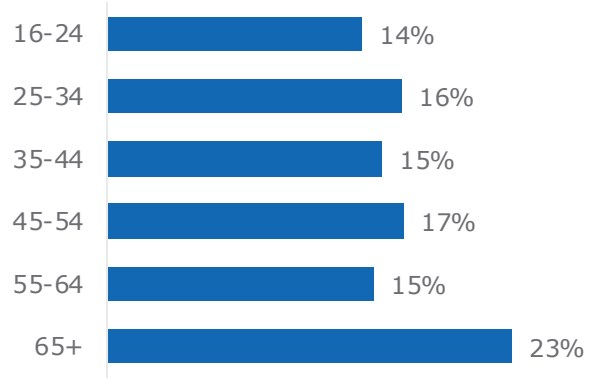
04 Audience profile

Weighted profile of participants

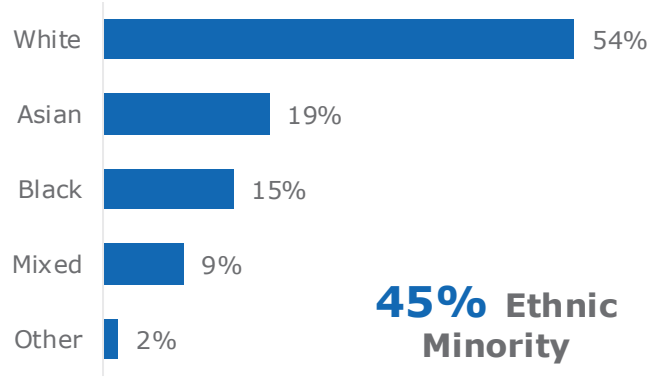
Nation



Age group

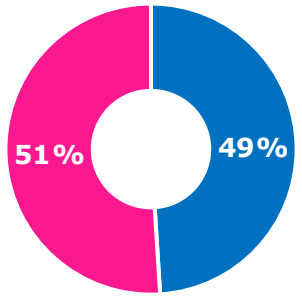


Ethnicity



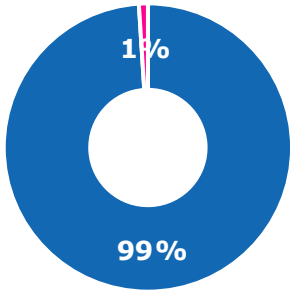
45% **Ethnic Minority**

Gender



Male Female

Gender identification same as assigned at birth

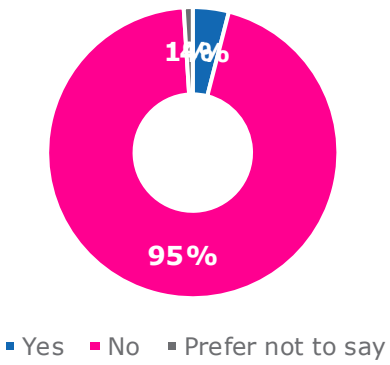


Yes No

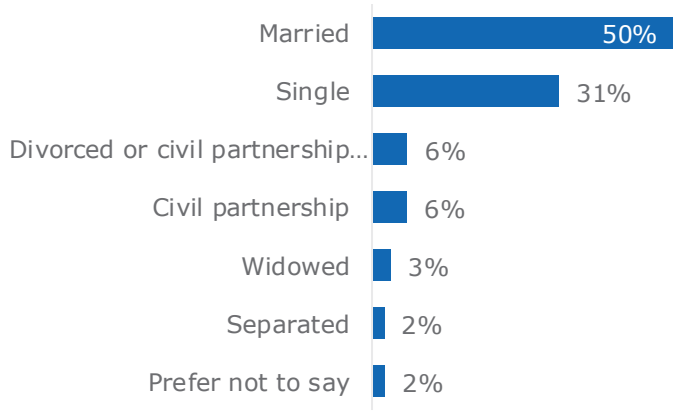
Source: S02, S03, S04, S05, S06 **Base:** All participants (2035)

Weighted profile of participants

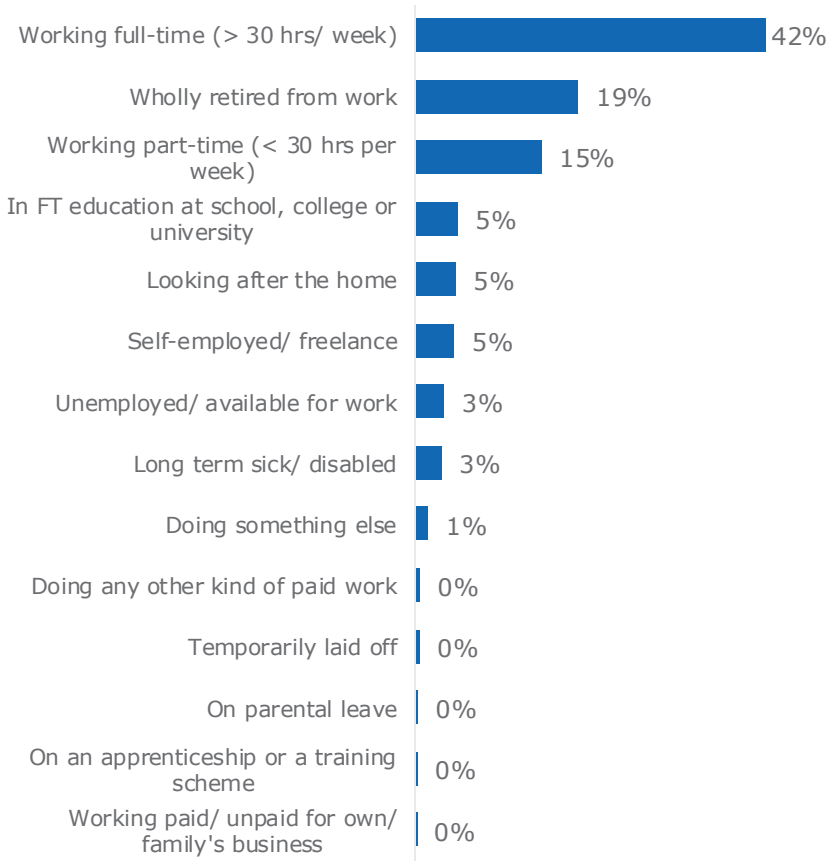
Pregnant/ maternity leave/ returning from maternity leave



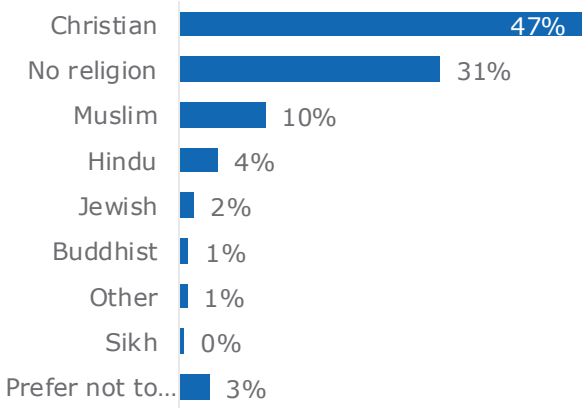
Marital status



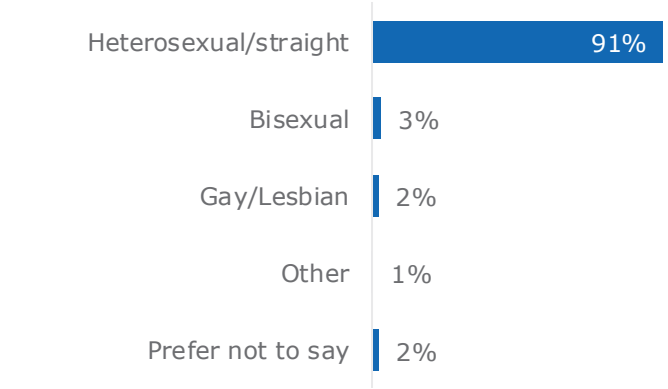
Working status



Religion



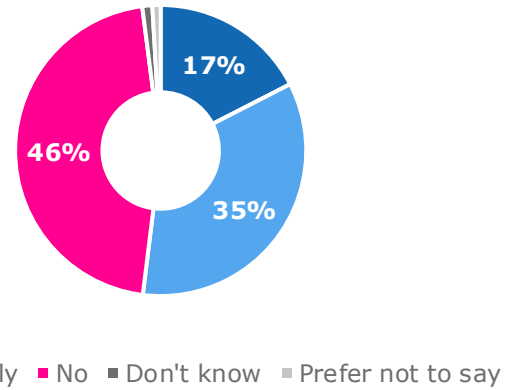
Sexual orientation



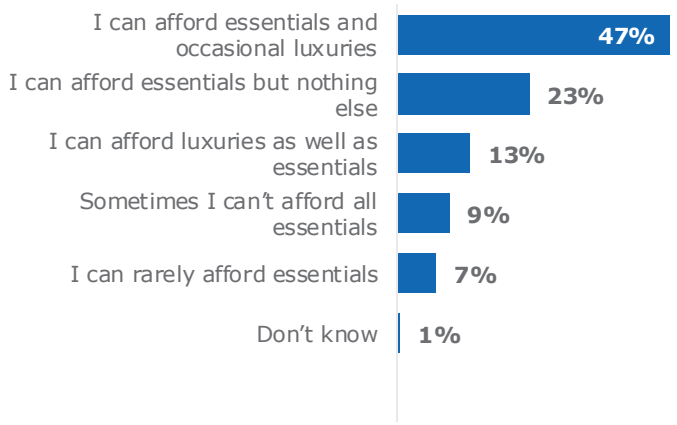
Source: C02, C05, C07, C08 **Base:** All participants (2035). C04. **Base:** All female participants (1046).

Weighted profile of participants

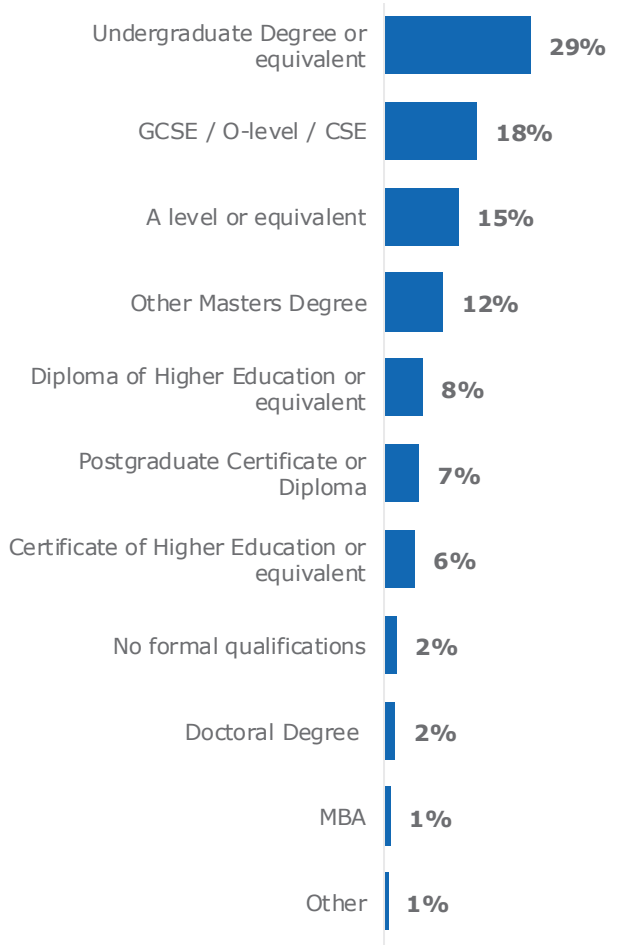
Financially struggling



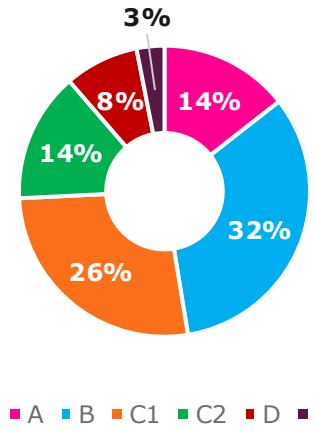
Ability to pay for luxuries or essentials



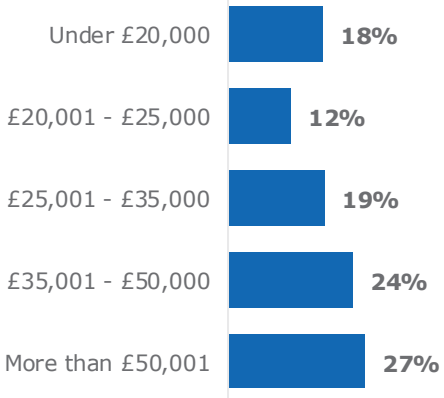
Highest level of education



SEG



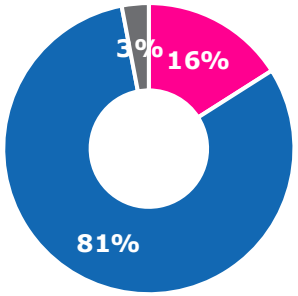
Annual income



Source:, C09, C10, C011, C014, C15 **Base:** All participants (2035)

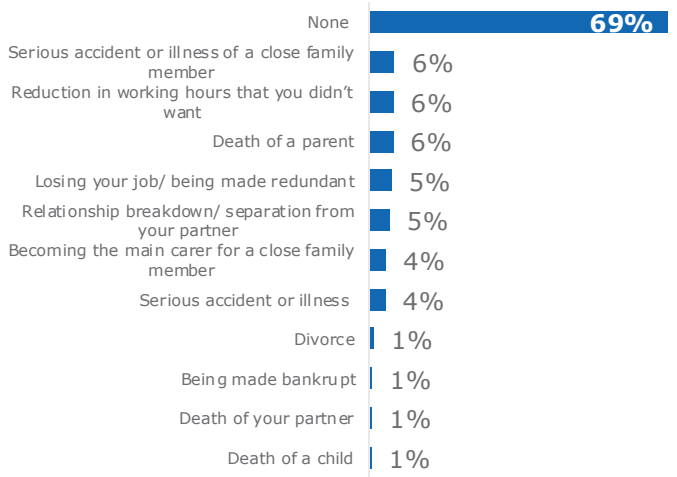
Weighted profile of participants

Disability

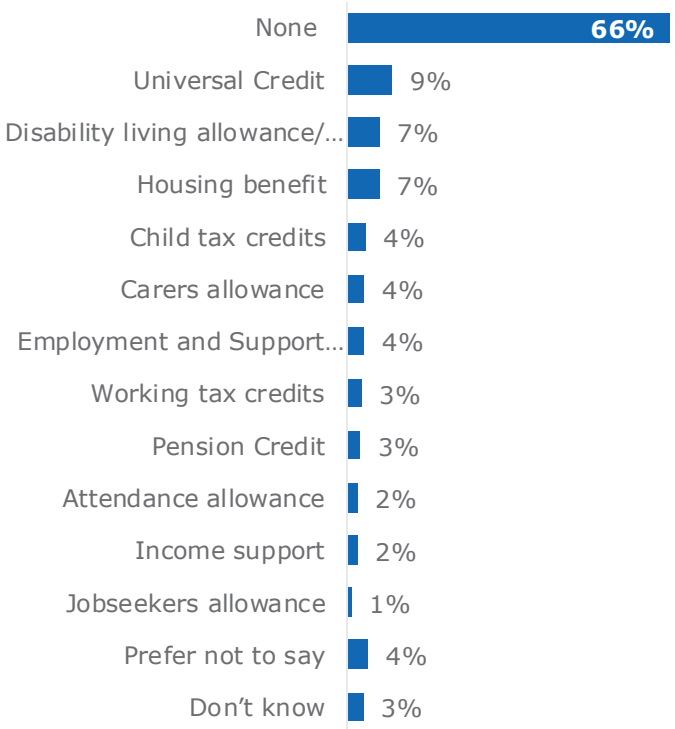


Yes No Prefer not to say

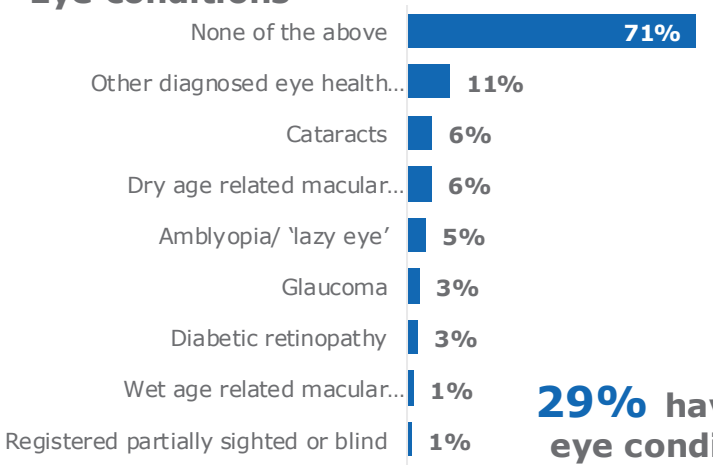
Events experienced in last 12 months



Benefits received

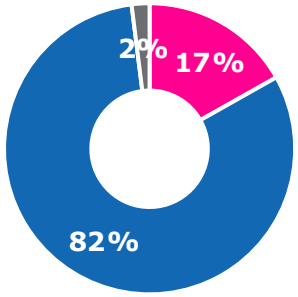


Eye conditions



29% have an eye condition

Role of a carer?

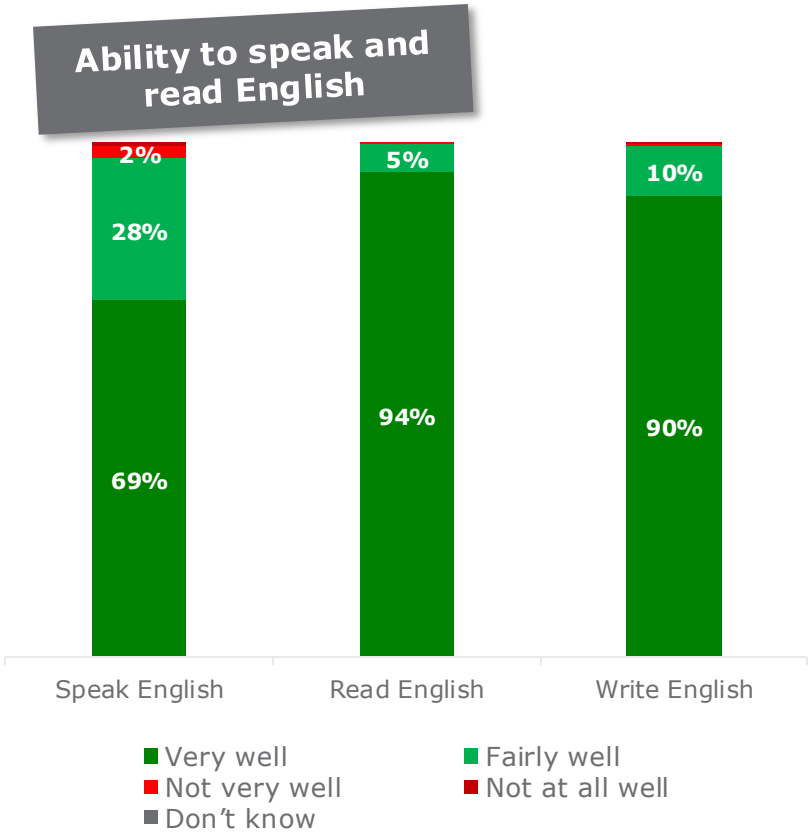


Yes No Prefer not to say

Source: C01, C02, C03, C06, C12, C13 **Base:** All participants (2035)

Language

Less than one in six (15%) say that English is not their first language, though amongst these participants, the vast majority feel they can speak English well. Across all participants, the vast majority (including non-native speakers) also feel that they can read and write English very well.



15% said that English was not their first language

Those more likely than to say that English is not their first language include (vs. 15% overall):

- Those aged 16-44 (19%);
- Those from an ethnic minority background (26%); and
- Carers (20%).

Among non-native English speakers, those more likely than overall to feel that they do not speak English well include:

- Those aged 25-34 (7%) and 65 and over (11%);
- Those from an Asian ethnic background (6%);
- Those in C2DE social groups (8%); and
- Those not currently working (8%).

Among both native and non-native English speakers, there are no significant differences when it comes to self-reported ability to read or write English.

Source: S07. Is English your first language, or not? **Base:** All participants (2035). **S08.** Overall, how well, or not, would you say you speak English? **Base:** All participants who do not speak English as their first language (271). **S08_1**. Overall, how well, or not, would you say you read/write English? **Base:** All participants (2035)

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