

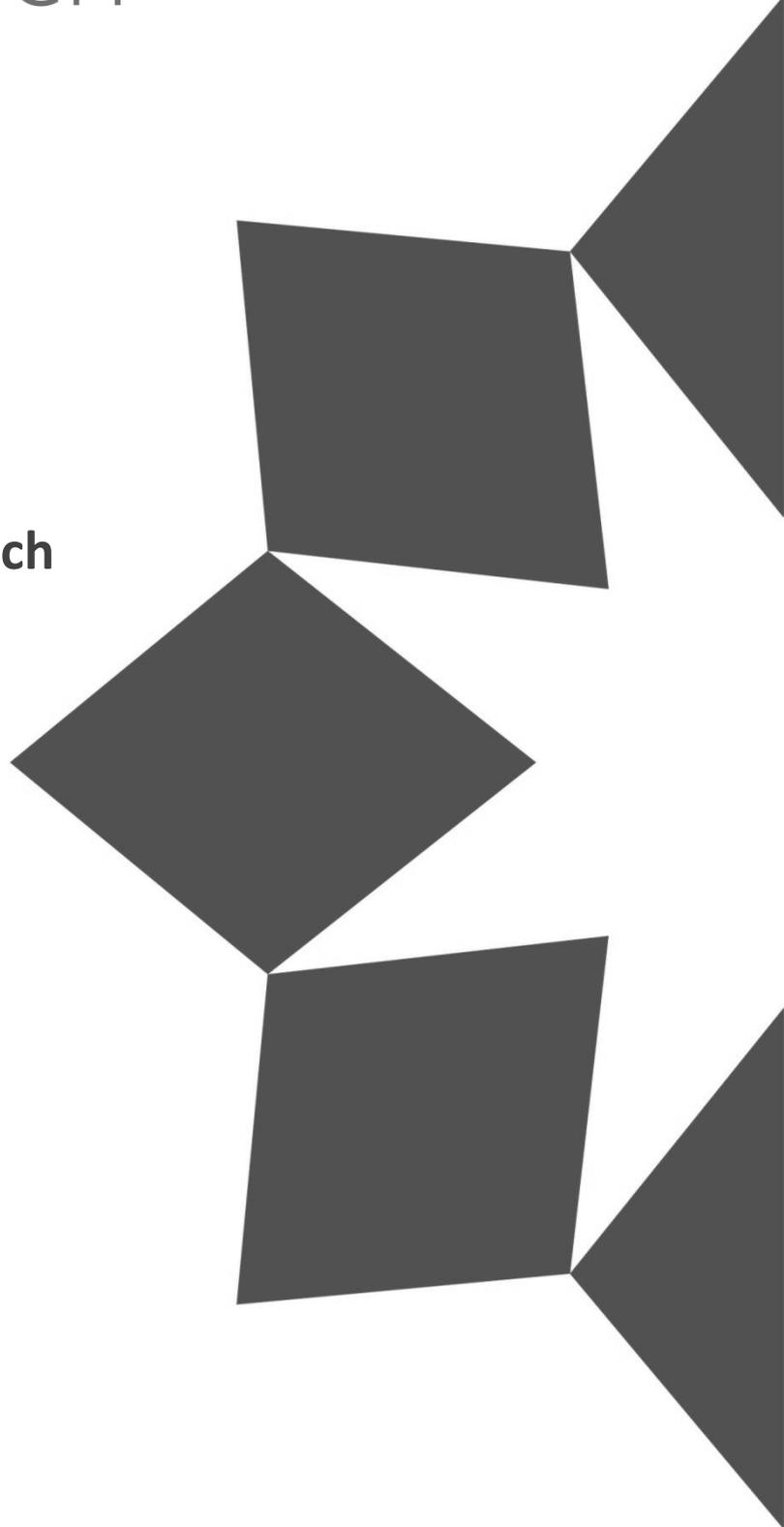


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General  Optical Council

**Public perceptions research**

**February 2021**



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# Project details

<b>Title</b>	Public Perceptions Research 2021
<b>Client</b>	General Optical Council
<b>Project number</b>	20189
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# Executive Summary

Based on a UK representative sample of 2,087 interviews which were completed online in January and February 2021, the headline messages for General Optical Council are summarised below.

## Public Perception Research 2021 – Key Messages



Were satisfied with their optician during their last sight test

Were satisfied with their last opticians visit overall



97%

Were satisfied with the protections that were in place during their last optician visit to protect them from coronavirus



30%

Would go first to an optician with an emergency eye problem, the second most common choice after a GP (38%)



Optician

94% confident



Pharmacist

91% confident



GP

90% confident



Dentist

89% confident

Nine in ten remain confident of receiving a high standard of care from an optician, in line with other healthcare providers



33% have delayed or put off making an appointment for a routine sight test during the pandemic.



25% of the public state that they have delayed replacing or buying new glasses during the pandemic.



Despite coronavirus disruption, 75% of the population visited an optician in the last two years, an increase of 6-percentage points from 2019.



62% of respondents would consider an initial consultation via video or telephone after coronavirus restrictions ease (63% among patients).



Just 10% of all respondents indicate that they have ever experienced a situation where something has gone wrong with the care/service they received from an optician down from 13% in 2019.

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## Perceptions and service experiences



The mission of the General Optical Council (GOC) is to protect and promote the health and safety of the public by upholding high standards in the optical profession. This regulatory function is being delivered across a sector that the public continue to view in a highly positive manner:

- The consistently high level of public satisfaction with opticians who carry out eye tests that has been evident in previous iterations of this research, has been sustained into 2021. More than nine in ten individuals (96%) who have visited an optician within the last two years state that they were satisfied with the optician who carried out that sight test. This is in line with the 96% recorded in 2019.
- Echoing the satisfaction levels for the optician who carried out the sight test, 96% of optician visitors during the last two years were satisfied with the overall experience of their opticians visit. Compared to 2019, this headline level of satisfaction has increased marginally by two percentage points from 94%.
- Public confidence in the profession that the General Optical Council regulates remains strong. Nine in ten respondents (94%) are either fairly or very confident in the standard of care that is provided by opticians. This proportion is in line with the confidence the public express for other healthcare professions.

Analysis by nation shows minimal variations in these strong perceptions.

Beneath these strong headline indicators, just one in ten (10%) of all respondents indicate that they have ever experienced a situation where something has gone wrong with the care/service they received from an optician. This represents a marginal decline in negative experiences from the 13% recorded in 2019. However, the proportion of respondents who say something went wrong is significantly higher for those visiting in the last 6 months (15%) and the last 6-12 months (10%). Further investigation may be required to establish if there are underlying reasons for this variation.

There also appears to be a need to restate/re-enforce the requirements within The Standards of Practice for Optometrists and Dispensing Opticians and Standards for Optical Students regarding being candid to patients and customers when something goes wrong and to provide an apology. In both 2017 and 2019, the majority of those who indicated that they had ever experienced a situation where something had gone wrong with the care/service they received from an optician, received an apology (56% and 58% respectively). This proportion has now fallen to 42%.

## **Understanding the impact of the coronavirus pandemic**

Three quarters (75%) of the population reported visiting an optician in the last two years. This is an increase of 6-percentage points from the 69% that was recorded in 2019. So while 33% of respondents indicate they have delayed or put off making an appointment for a routine sight test during the pandemic, this has been insufficient to reduce the overall percentage who have visited an optician over this longer two-year timeframe.

When asked when they are next likely to see an optician, 71% of respondents envisage that this will be within the next 12 months. Within this, 13% suggest that this visit will be in the next three months, and a further quarter (25%) suggest that their next visit will be within the next six months. This gives an indicator of likely service demand in the short term.

One quarter (25%) of the public state that they have delayed replacing or buying new glasses during the pandemic period, a proportion that increases to 30% among existing glasses or contact users. As well as delayed expenditure, there is some evidence of channel shift in purchasing, with 11% indicating that during the pandemic the way in which they buy glasses and contact lenses has changed e.g. making purchases online rather than in store. Changes

to purchasing patterns were most common among those aged under 44 (16-24: 14%, 25-34: 16%, 35-44: 14%).

When stating if they have ever felt uncomfortable visiting an optician, the 5% who said in 2021 that they don't like someone being physically close to them during the sight test, is in line with the 6% recorded in 2019. On this basis, the importance of this factor has not changed significantly as a result of the coronavirus pandemic. The most common explanation for ever feeling uncomfortable about visiting an optician is pressure to buy glasses or contacts, which is cited by 20% of all respondents.

The public appear to have very high satisfaction with the measures that have been put in place by opticians to avoid current virus transmission. In total, 97% of these most recent optician visitors expressed satisfaction, including 75% who were very satisfied. Looking more specifically at those who have been shielding because of COVID-19 (85 individuals responded to this question), a clear majority (93%) of this vulnerable group were satisfied with the protections put in place during their visit to the opticians. Given the level of service re-design and risk mitigation that the coronavirus pandemic has necessitated for practitioners, these figures which demonstrate strong public confidence in the protections that have been put in place, are an achievement that should be celebrated.

Looking to the future, there is majority acceptance among the public of the digital consultation channels that the lockdown and social distancing rules have often necessitated. In a situation where respondents had an eye problem, 73% state that they would consider having an initial appointment by phone or video call during the current coronavirus pandemic. In the longer term, once coronavirus restrictions ease, the proportion of respondents who would consider an initial consultation via these digital channels drops to 62%. However, this still represents a majority and therefore this public willingness does potentially offer the opportunity for greater flexibility and innovation in service delivery going forward. Future waves of this research may well benefit from including questions to ascertain satisfaction with digital consultations.

# Research objectives and methodology

## Research background and objectives

The General Optical Council (GOC) is the regulator for the optical professions in the UK. The mission of the GOC is to protect and promote the health and safety of the public by upholding high standards in the optical profession. The General Optical Council currently registers around 30,000 optometrists, dispensing opticians, student opticians and optical businesses. As part of the organisation's research programme which seeks to help understand the views and experiences of members of the public across the UK, a new wave of public perceptions research was commissioned with M·E·L Research in early 2021. This study was the fifth iteration of this research, which was first carried out in 2015.

The key objectives of the 2021 public perceptions survey were to:

- conduct a survey with a robust and representative sample of the UK adult population (16+) including a mix of both patients and non-patients;
- measure and track trends in perceptions and levels of awareness over time, comparing results to previous years;
- Collect new data on the impact of the coronavirus pandemic on public confidence in visiting an optician and to explore the wider behavioural impacts resulting from the pandemic that might impact upon future service provision within the sector.

## Methodology

The 2021 survey was redesigned jointly by M·E·L Research and the GOC to ensure that the survey content remained aligned with the GOC's strategic objectives and so that it reflected the practical experiences the public will have had of using eyecare services throughout 2020 and 2021.

A copy of the questionnaire can be found in Appendix B. Interlocking quotas were set to ensure a representative sample was achieved based on gender and age within each UK nation based on the latest mid-year population estimates. Scotland, Wales and Northern Ireland were over-sampled to ensure that confident statistical analysis could be undertaken by nation. The survey was hosted online and distributed to a UK consumer panel, which includes members of the public who have signed up to take part in online research on a wide number

of topics. This approach replicates the approach used in the last wave of this research delivered in 2019. Earlier waves used a mixture of telephone and online techniques.

In total 2,087 interviews were completed, exceeding the 2,000 interview target set. The distribution of these interviews per nation is shown in the figure below.

*Figure 1: Sample achievement by nation*



A full sample profile by nation can be found in Appendix A. Prior to the application of weighting, the survey included:



1,646 individuals who are either glasses or contact lens wearers (79%)



324 who have conditions that required them to shield during the coronavirus pandemic (16%).

The 2021 dataset also includes variables held on online panel members based on the information panellists have provided about themselves. These variables are:

- Holders of private health insurance;
- Those who have the following chronic illnesses – Type 1 Diabetes, Type 2 Diabetes, high blood pressure and obesity.

As the online survey was undertaken with a sample of the general public, all results are subject to sampling tolerances. For example, when interpreting the results to a survey question which all respondents answered, where 50% responded with a particular answer, there is a 95% chance that this result will vary by no more than +/- 2.15 percentage points had the result been obtained from the entire UK population (16+). Sampling tolerances are higher for the smaller subgroup populations such as Northern Ireland, Scotland and Wales. Each of these nations has a 95% confidence interval level of +/- 6 percentage points, with England having a 95% confidence interval level of +/- 2.72 percentage points.

## Analysis and reporting

Weights have been applied to the returned data to ensure that certain subgroups are not over or under-represented within the data, and that the data is as close to the demographic profile of the UK as possible in terms of gender and age. Weighting adjusts the proportions of certain groups within a sample to match more closely to the proportions in the target population. Minor weighting corrections were applied by age and gender within each nation.

When setting the survey quotas, it was decided that the nations of Scotland, Wales and Northern Ireland should be over-sampled to allow for confident data analysis at a nation-specific level and also to allow confident analysis between countries. To be consistent with the approach used in 2019, the data has not been weighted to adjust the number of responses by UK nation to be truly representative of the UK.

### Statistical tests

To provide further insight into the results, we have carried out sub-group analysis by different demographics and some other variables (e.g. time period of last optician visit and current use of glasses and contact lenses). The results for these sub-groups have been presented only where they are statistically significant (at the 95% confidence level) and if the base sizes are

30 or more. Where there is a statistically significant difference between groups, this has been noted in the report as a “significant” difference. However, a significant difference may not necessarily mean that the difference is ‘important’.

### **Presentation of data**

Throughout this report, those who took part in the survey are referred to as ‘respondents’. For the purpose of this report, those who reported visiting an optician in the last two years are referred to as ‘patients’. Those who reported visiting an optician more than two years ago or never are referred to as ‘non-patients’.

The term ‘optician’ has been used throughout the research rather than the two distinct optical professions the GOC regulates – optometrists and dispensing opticians. This term was used throughout the research to avoid confusion on the assumption that the public do not clearly distinguish between the two professions. However, the 2021 research did include a question that was designed to test this assumption in order to guide future research design.

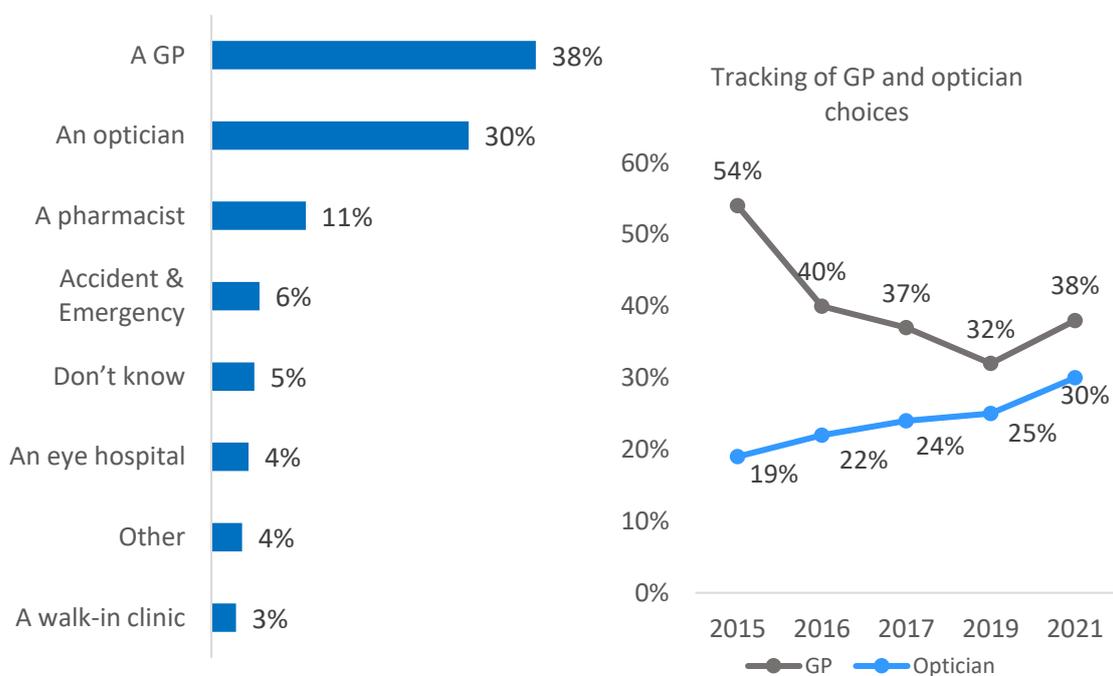
Owing to the rounding of numbers, percentages displayed on graphs may not always add up to 100% and may differ slightly to the text. The figures provided in the text should always be used as the authoritative results.

# Public perceptions of opticians

## The role of opticians in treating eye problems

When asked where they would go or who they would see if they woke up tomorrow with an eye problem, the most common response was a GP (38%). An optician was the second most commonly selected option, chosen by 30% of respondents. The fact that three in ten respondents would speak to an optician first is a new high in this research, representing an 11-percentage point increase since 2015. As shown in Figure 2, there has been an ongoing upwards trajectory in the proportion who would seek assistance from an optician since 2015. Between 2015 and 2019, the gap in the proportions choosing a GP and an optician as a source of advice has narrowed. Since the last wave of this research in 2019, there has been a concurrent rise in those who would contact a GP or an optician first. Therefore, the percentage point gap between those who would contact a GP over an optician has remained stable year on year (+7 2019, +8 2021).

Figure 2: 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? (All respondents)

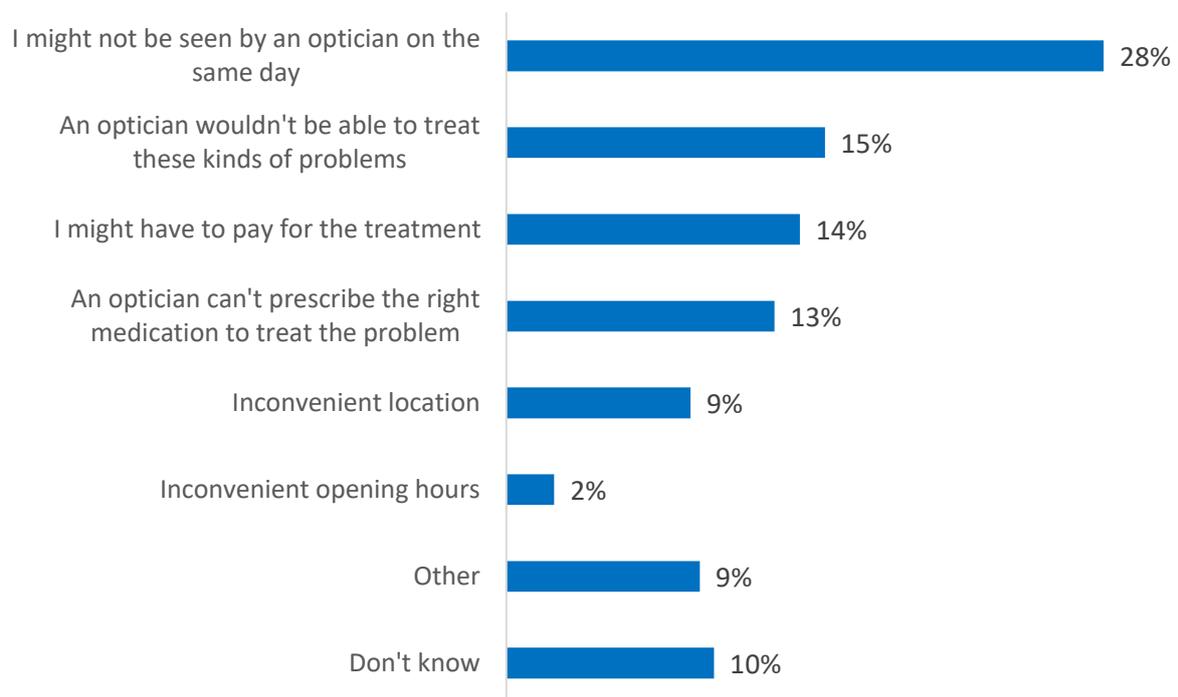


Unweighted sample base: 2021 (2087) / 2019 (2,000) / 2017 (3,025) / 2016 (3,252) / 2015 (2,250)

Among patients (those who have visited an optician within the last two years), the proportion who would go to an optician first if encountering an eye problem is significantly higher (34%) than the proportion of non-patients (18%) who would do so. Among patients there is an equal proportion who would opt to seek advice for an eye problem from a GP (36%) and an optician (34%).

A mixture of reasons is given for choosing not to go to an optician first if experiencing an eye problem. The most common of these is scepticism about being able to get a same day appointment (28%). Around one in seven respondents do not think opticians would be able to treat an eye problem, such as something in their eye, a red eye or blurred vision (15%), with the same proportion (14%) anticipating having to pay for treatment. The ability to be seen by an optician on the same day was consistently the most common explanation in each nation.

*Figure 3: Why would you choose not to go to an optician first in this situation? (Those who did not select an optician for advice on an eye problem)*



*Unweighted sample base: 2,087*

The ability to book a same day appointment was also the most common response to this question in 2019 (24%), followed by an optician being unable to prescribe medication for eye problems (18%) and generally being unable to treat these kinds of problems (also 18%).

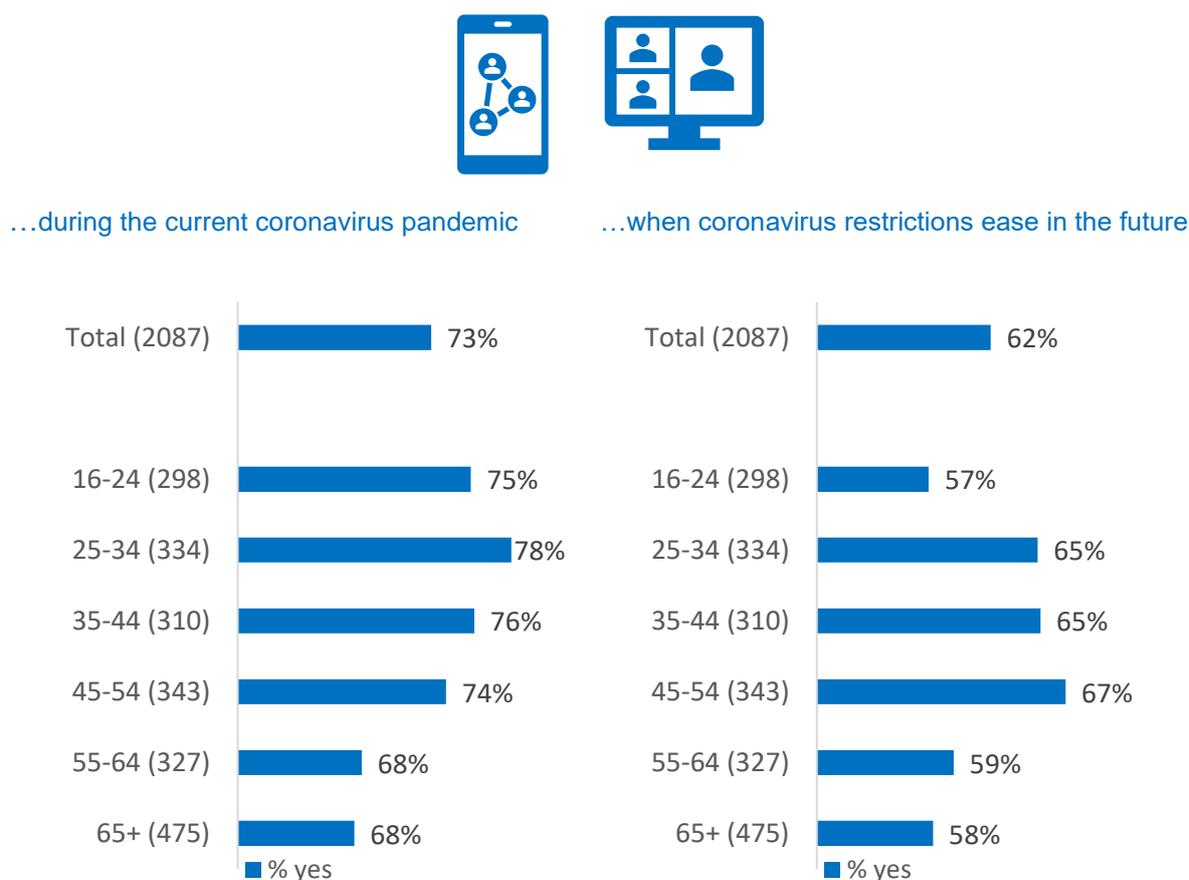
Among patients, the primary reason for not considering an optician is the potential of not being seen by an optician on the same day (31%). Just 21% of non-patients cited this as their explanation which is a significant difference. Although this remains the key explanation for non-patients, significantly more of this group mention that they might have to pay for the treatment (18% cf. 12% of patients).

There is no evidence to suggest that the potential cost of treatment is a greater concern among those without private health insurance than among those who do have such cover.

## Consultation channels

In order to minimise levels of face-to-face contact during the coronavirus pandemic, various health services have reconfigured their services to have a greater emphasis on video and telephone consultations. In a situation where respondents had an eye problem, 73% of respondents state that they would consider having an initial appointment by phone or video call during the current coronavirus pandemic. In the longer term, once coronavirus restrictions ease, the proportion of respondents who would consider an initial consultation via these digital channels drops to 62%. However, this still represents a majority and therefore this public willingness does potentially offer the opportunity for greater flexibility and innovation in service delivery going forward. Future waves of this research may well benefit from including questions to ascertain satisfaction with digital consultations.

*Figure 4: In response to coronavirus restrictions, some opticians have been offering initial appointments by phone and over video calls. Is this a service that you would consider using if you had an eye problem...? (All respondents)*



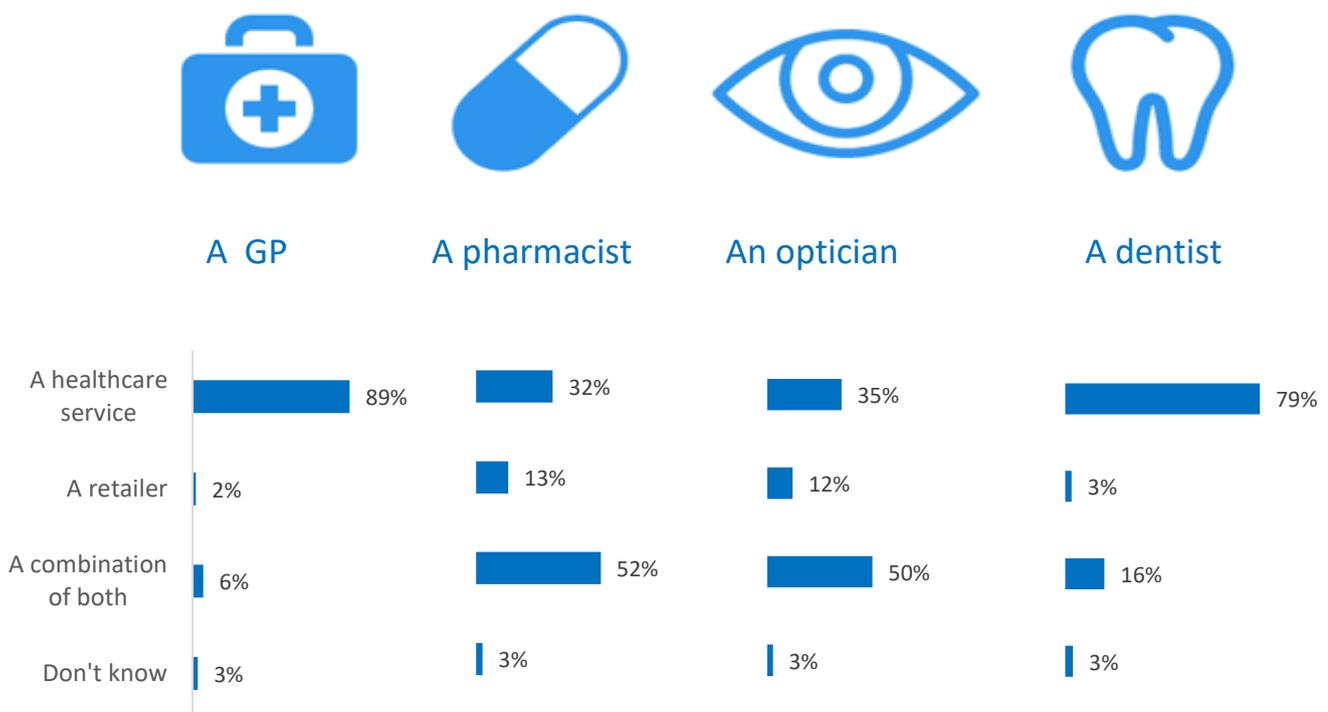
*Unweighted bases in parenthesis*

In the short term and in the future when coronavirus restrictions ease, a majority of all age groups would consider an initial appointment via phone or video call, albeit with stronger support evident among those under the age of 55. However, in all age groups the level of consideration of this approach drops when considering the post-pandemic future, where digital channels are likely to be more of choice than a necessity.

## Healthcare service or retailer?

When considering the characteristics of opticians, half (50%) of all respondents perceive them to be a combination of both retailer and healthcare service provider. Just over a third (35%) of respondents perceive opticians to be solely a healthcare service, while 12% see them predominantly as a retailer. In terms of their positioning, opticians are seen in a very similar way to pharmacists whom 52% of respondents describe as both retailer and healthcare service provider. To put these results into context, 89% of respondents see GPs solely as a healthcare service provider and 79% see dentists in the same way.

*Figure 5.5. When you think about the following, do you think of them primarily as a healthcare service, a retailer or a combination of both? (All respondents)*

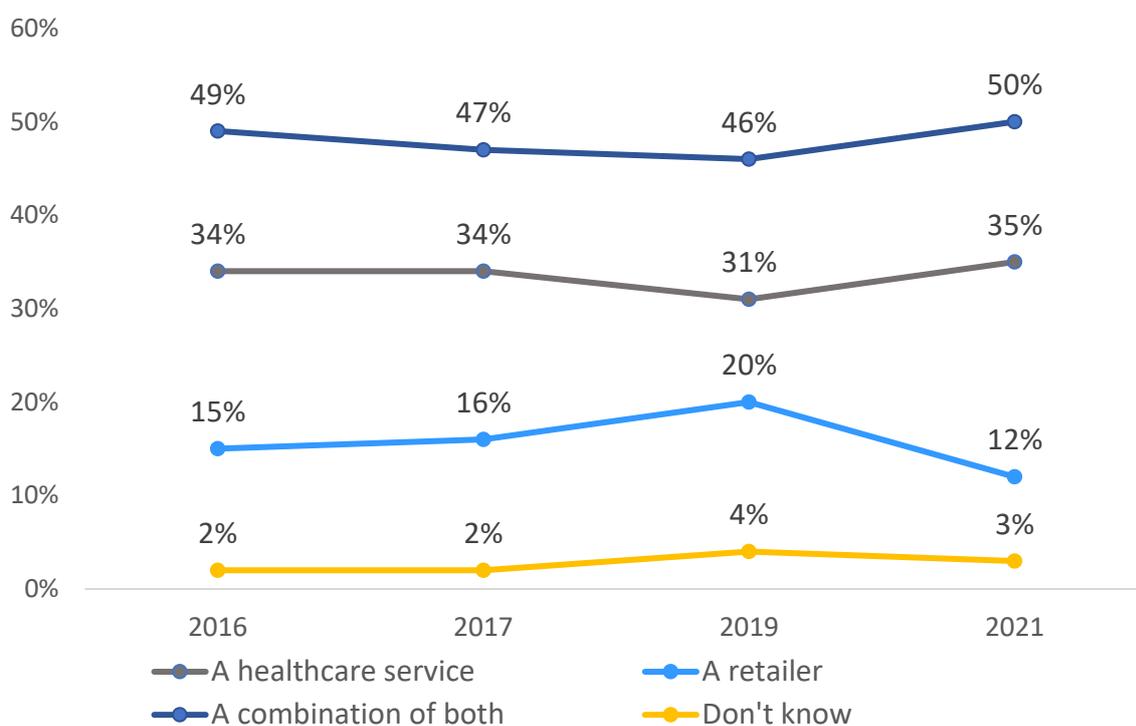


Unweighted sample base: 2,087

Respondents across all nations most commonly conceptualise opticians as a combination of healthcare provider and retailer. Respondents in England are those who most commonly identify opticians solely as retailers. The 14% who do so here, is significantly higher than the 9% seen in Scotland and the 8% recorded in Wales. In Northern Ireland, 11% of respondents identify opticians solely as retailers.

This question has been asked in a consistent manner since 2016. Throughout this period the most common conceptualisation of opticians has consistently been as a mixture of retailer and healthcare service. The proportion of respondents who see opticians primarily as a healthcare service has increased by 4-percentage points since 2019, returning to the levels recorded in 2016 and 2017.

*Figure 6: Tracking of how opticians are perceived 2016-2021 (All respondents)*

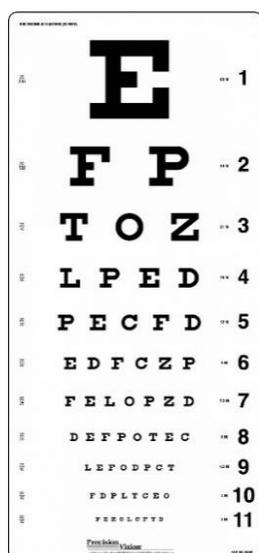


Unweighted sample base: 2021 (2087) 2019 (2,000) / 2017 (3,025) / 2016 (3,252)

Among patients there is a significantly stronger identification of opticians as a healthcare provider (38%), than among non-patients (29%). However, both groups most commonly conceptualise opticians as a mixture of retailer and healthcare provider (50% and 51% respectively).

## Recognition of the roles of dispensing opticians and optometrists

As noted in the report introduction, the term 'optician' has been used throughout this research rather than the two distinct optical professions the GOC regulates – optometrists and dispensing opticians. In response to feedback from these two professions, a question was included within the 2021 survey design in order to assess how accurately the public identify each of these professions with the roles they perform. The public were given these definitions after the completion of this question.

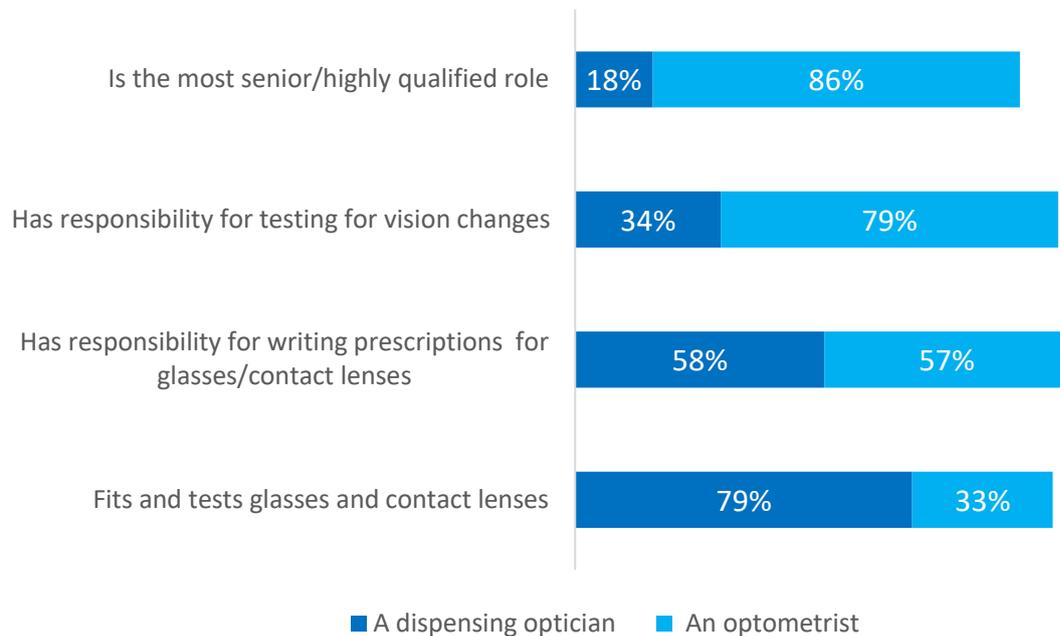


**Optometrists** *examine eyes, test sight and prescribe spectacles or contact lenses for those who need them. They also fit spectacles or contact lenses, give advice on visual problems and detect any ocular disease or abnormality, referring the patient to a medical practitioner if necessary.*

**Dispensing opticians** *advise on, fit and supply the most appropriate spectacles after taking account of each patient's visual, lifestyle and vocational needs. They also play an important role in advising and dispensing low vision aids to those who are partially sighted as well as advising on and dispensing to children where appropriate. They are also able to fit contact lenses and provide aftercare for contact lenses after undergoing further specialist training.*

Please note more than one response was possible to this question, so the sum of the two percentages for each task is greater than 100%. Without seeing the above information, 86% correctly identified an optometrist as the most senior/highly qualified role. Eight in ten (79%) suggest that an optometrist has responsibility for testing for vision changes, while 34% suggest a dispensing optician does this. When considering the responsibility for writing prescriptions for glasses/contact lenses, equal proportions say this is a responsibility of optometrists (58%) and dispensing opticians (57%). Therefore, there appears to be an over estimation of the role of dispensing opticians in the area of testing and prescription writing. The fitting and testing of glasses and contact lenses is more commonly identified as being the role of a dispensing optician (79%).

Figure 7: Which of these do you think...(All respondents)



Unweighted sample base: 2087

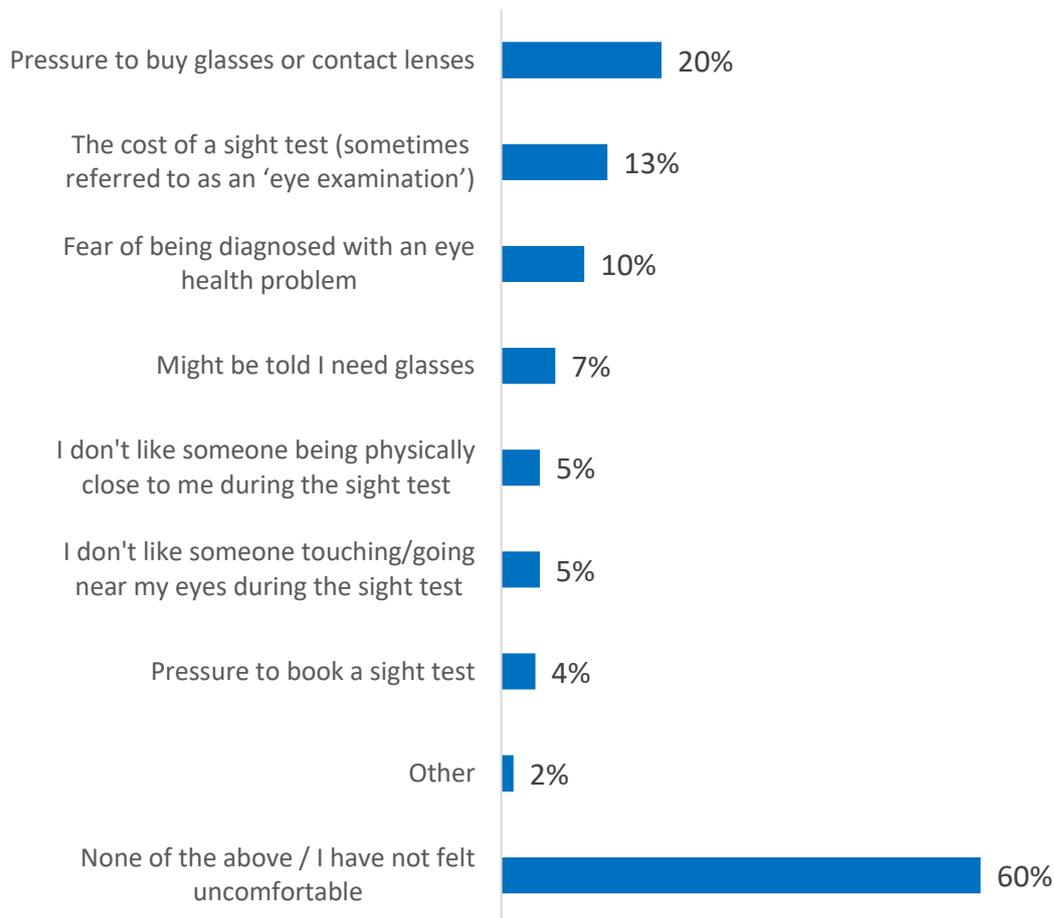
On this basis, while the public do seem to have a reasonable grasp of the roles of these two functions, there is some misappropriation of responsibilities around testing for vision and prescriptions in particular. Drilling down to the views of patients, for three of the four functions that respondents were presented with, the understanding of patients was no different to those of non-patients. For the fitting and testing of glasses and contact lenses, significantly more patients than non-patients designate this the responsibility of dispensing opticians (80% cf. 73%).

# Using the services provided by opticians

## Discomfort about visiting an optician

Six in ten (60%) respondents have never felt uncomfortable about visiting an optician. Among the four in ten who have felt uncomfortable in some way, the most common explanation is pressure to buy glasses or contacts, cited by 20% of all respondents. The cost of a sight test was mentioned by 13%, while 10% said their discomfort stemmed from concern about being diagnosed with an eye health problem.

*Figure 8: Have you ever felt uncomfortable about visiting an opticians for any of the following reasons (All respondents)*



*Unweighted sample base: 2,087*

The 5% who indicate that they don't like someone being physically close to them during the sight test, was at a similar level in 2019 (6%). On this basis, the importance of this factor has not changed significantly as a result of the coronavirus pandemic.

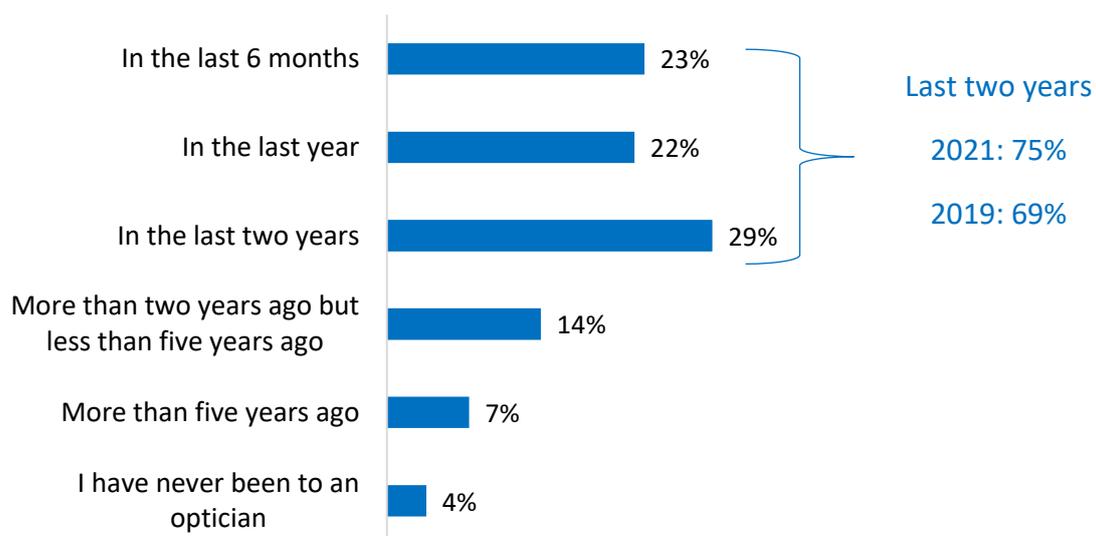
Looking at these responses in more detail shows a significant variation by age. Those aged 16-24 and 25-34 are significantly more likely to have selected one of the concerns at this question (55% and 54% of individuals in each age band). This heightened concern in these age groups relates to the cost of a sight test (24% and 23% respectively) and potential pressure to buy glasses (21% and 28% of each age group).

### Last reported visit to an optician

Three quarters (75%) of the population reported visiting an optician in the last two years. This is an increase of 6-percentage points from the 69% that was recorded in 2019. So while there is evidence elsewhere in this report of sight test appointments being delayed during the last 12 months, this has been insufficient to reduce the overall percentage who have visited an optician over this longer two-year timeframe.

It should be noted that a visit does not necessarily mean that respondents had had an eye test at that visit, but it is likely that if they are visiting an optician to purchase spectacles or contact lenses that they would have had an eye test.

Figure 9: When was the last time you saw an optician? (All respondents)



Unweighted sample base: 2,087

The proportion of respondents who have seen an optician in the last two years is consistent by nation (England: 75%, Wales: 74%, Scotland: 77%, Northern Ireland: 76%). Among existing glasses or contact lens wearers, 84% have seen an optician within the last two years.

In the vast majority of instances (91%) respondents last saw an optician in a high street setting. However, in reviewing the results in this report and in particular the service experiences received, it should be recognised that 3% saw an optician in a doctor's surgery, 3% did so in a hospital and 1% did so in a care home or their own home.

*Figure 3: Thinking of the last time you saw an optician, where was this? (All respondents)*



- In a high street optician (91%)
- In a doctor's surgery (3%)
- In a hospital (3%)
- In a care home/my own home (1%)
- Somewhere else (2%)

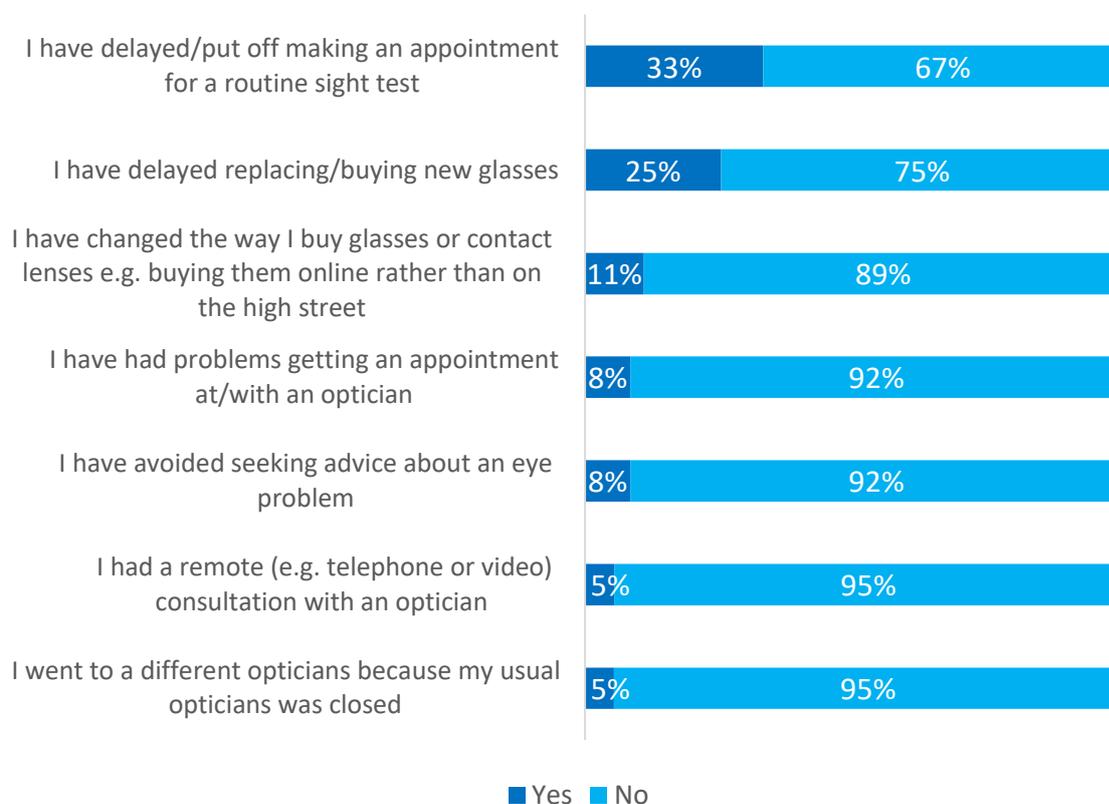
*Unweighted sample base: 2,014*

## Behaviour changes related to the coronavirus pandemic

The 2021 iteration of this research was redesigned so that data on pandemic driven behaviour change within the public could be explored and quantified. All respondents were asked to indicate whether any of seven situations applied to them. These situations covered presenting for routine eye tests and getting advice on eye problems, as well as consumer choices such as shifting purchasing to online channels.

As shown by the figure below, a third of respondents (33%) delayed or put off making an appointment for a routine sight test during the pandemic. Among existing glasses or contact lens wearers the proportion who did so was 36%. Choosing to delay a routine sight test was most common among those individuals whose last eye test was two years ago (44%) or even longer ago (46%), thus extending further the period in which their eye health has not been checked. A further 8% indicate they have had problems getting an appointment. No significant variation by nation is evident on this ease of setting appointments indicator.

*Figure 10: Thinking about the coronavirus pandemic, have any of these situations applied to you? (All respondents)*



*Unweighted sample base: 2,087*

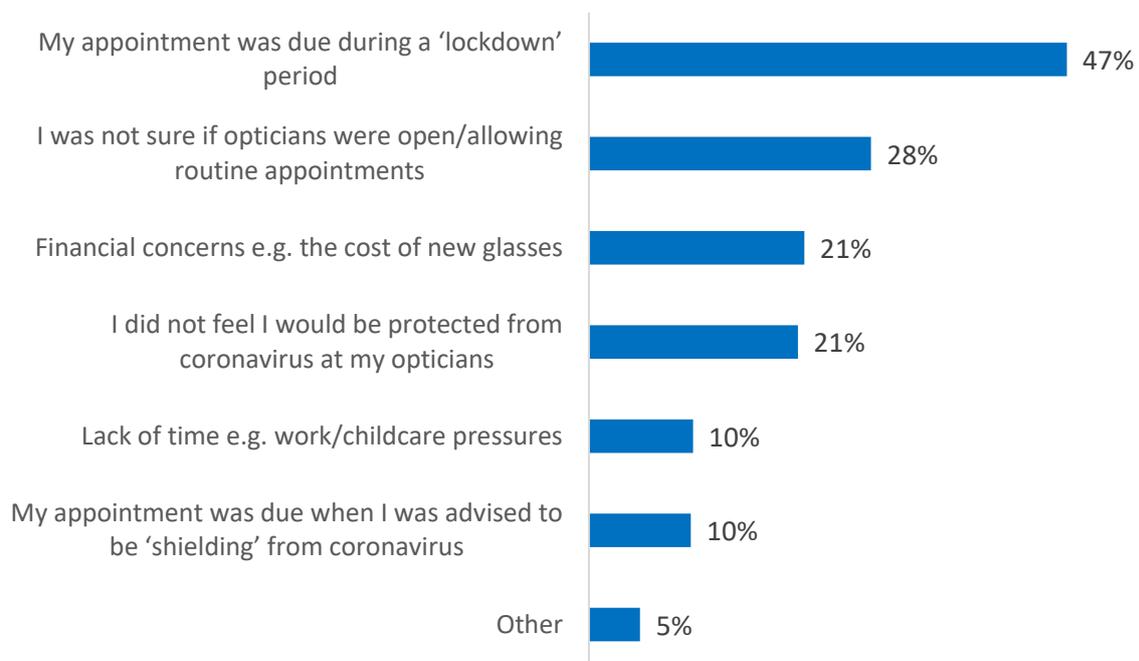
One quarter (25%) of the public state that they have delayed replacing or buying new glasses during the pandemic period, a proportion that increases to 30% among existing glasses or contact users.

As well as delayed expenditure there is some evidence of channel shift in purchasing, with 11% indicating that during the pandemic the way in which they buy glasses and contact lenses has changed e.g. making purchases online. Changes to purchasing patterns were most common among those aged under 44 (16-24: 14%, 25-34: 16%, 35-44: 14%).

Responses also show that 8% of individuals avoided seeking advice about an eye problem during the pandemic period, a possible indicator of the wider health impacts the events of the last year have had. This avoidance of seeking advice was significantly higher among the youngest group of respondents (13% of those aged 16-24).

Those who delayed or put off making an appointment for a routine eye test were asked to select reasons that best explained this choice. The most common response was that their appointment was due during a lockdown period (47%).

*Figure 11: Which of these reasons best describes why you delayed/put off making an appointment for a routine sight test? (All who delayed a routine eye test)*



*Unweighted sample base: 692*

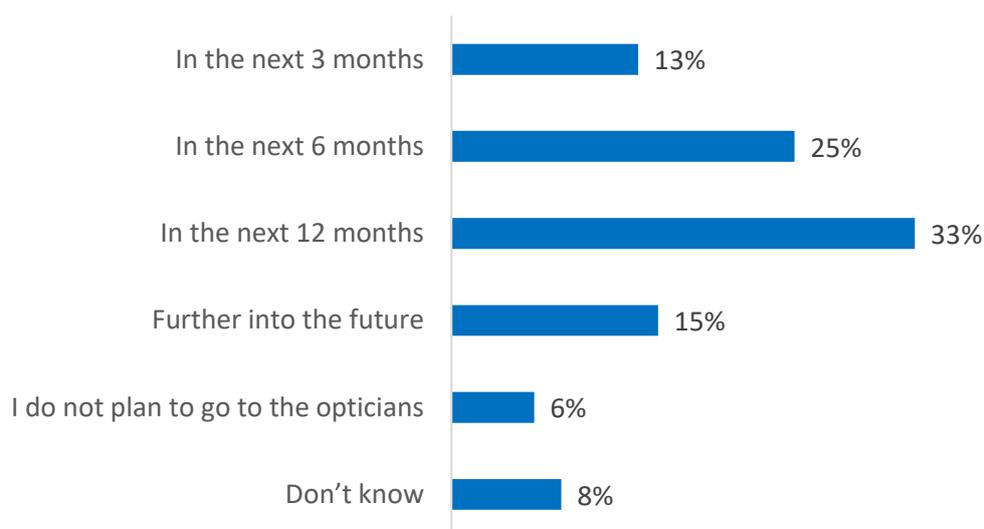
While clarity has been established in more recent lockdown periods regarding the provision of routine eye tests vis-a-vis emergency care, the public will have experienced some initial periods of lockdown where eye tests were not possible. A further 28% of respondents to this question said they were uncertain if opticians were open or allowing routine appointments. The other key drivers of routine tests being delayed, were concerns about coronavirus transmission/protections (21%) and financial concerns such as the cost of new glasses (21%).

No significant variations in these explanatory factors are evident by nation. Analysis by age shows that in all age groups lockdown related disruption was the primary reason for appointments being delayed/put off. Beneath this, it is evident that among those aged 65 and over, the proportion citing shielding requirements as a reason for delaying a routine sight test doubles to 21%. Among younger age groups, financial concerns are more prominent (cited by 27% of those aged 16-24 and those aged 25-34).

## Potential future service demand

When asked when they are next likely to see an optician, 71% of respondents envisage that this will be within the next 12 months. Within this, 13% suggest that this visit will be in the next three months, and a further quarter (25%) suggest that their next visit will be within the next six months. This gives an indicator of likely service demand in the short term.

*Figure 12: When do think you will next see an optician? (All respondents)*



*Unweighted sample base: 2087*

Around seven in ten residents in each nation state that their next visit to an optician will be within the next 12 months, peaking at 77% in Northern Ireland (England: 70%, Wales: 70%, Scotland;73%, Northern Ireland: 77%).

Among those who have been shielding because of coronavirus, there is no significant variation in the likelihood of these individuals presenting at an optician in the next 12 months compared to those who have not been shielding (76% vs 70%). Therefore, heightened vulnerability to coronavirus does not appear to be manifesting itself in a reduced tendency to visit an optician in the near future.

Further analysis of the data does however show that those who currently have either glasses or contact lenses are significantly more likely to have plans for visiting an opticians than those who do not. As shown by the table below, approaching half (44%) of non-glasses or contact lens wearers either do not plan to go to the opticians (22%) or indicate that a visit will be in more than 12 months' time (22%). This obviously has implications for the potential detection of health conditions among these individuals.

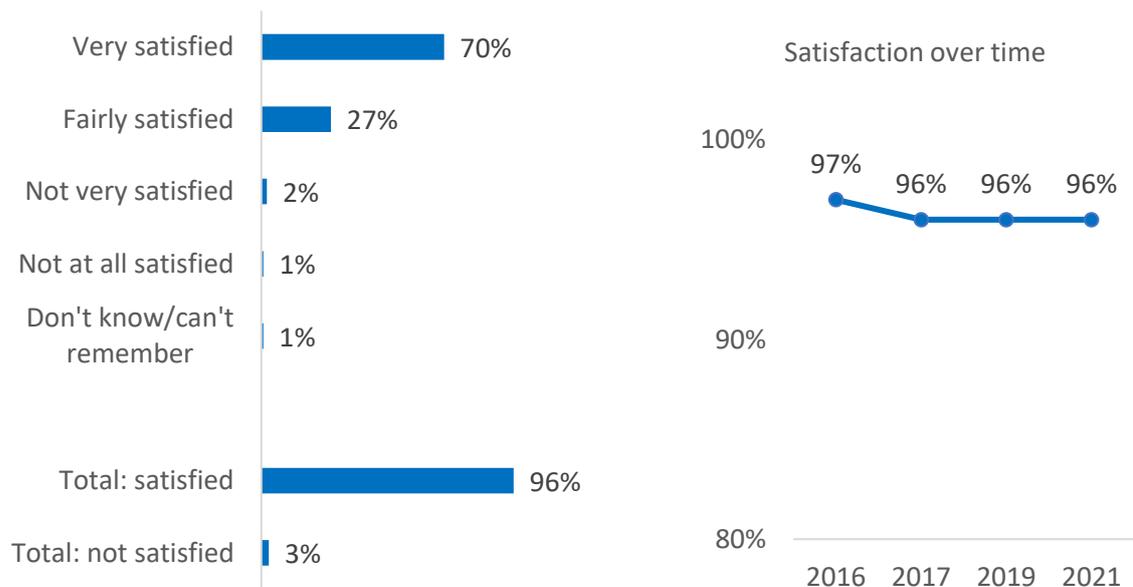
*Table 1: Plans for seeing an optician by existing glasses/ contact lens use (All respondents)*

	Glasses or contacts wearer (1646)	Non-glasses or contacts wearer (441)
In the next 3 months	15%	8%
In the next 6 months	28%	14%
In the next 12 months	36%	23%
Further into the future	13%	22%
I do not plan to go to the opticians	2%	22%
Don't know	7%	11%

# Satisfaction with visits to an optician

The consistently high level of public satisfaction with opticians who carry out eye tests that has been seen in previous iterations of this research, has been sustained into 2021. More than nine in ten individuals (96%) who have visited an optician within the last two years state that they were satisfied with the optician who carried out that sight test. This is in line with the 96% recorded in 2019. Within the 2021 responses, seven in ten respondents (70%) selected the most positive response possible on the answer scale, stating that they were very satisfied. Just 3% of optician visitors from the last two years indicated any level of dissatisfaction with the optician who carried out their sight test.

Figure 13: Thinking of the last time you saw an optician, how satisfied or otherwise were you with the optician who carried out your sight test? (All those who have visited an optician within the last 2 years)



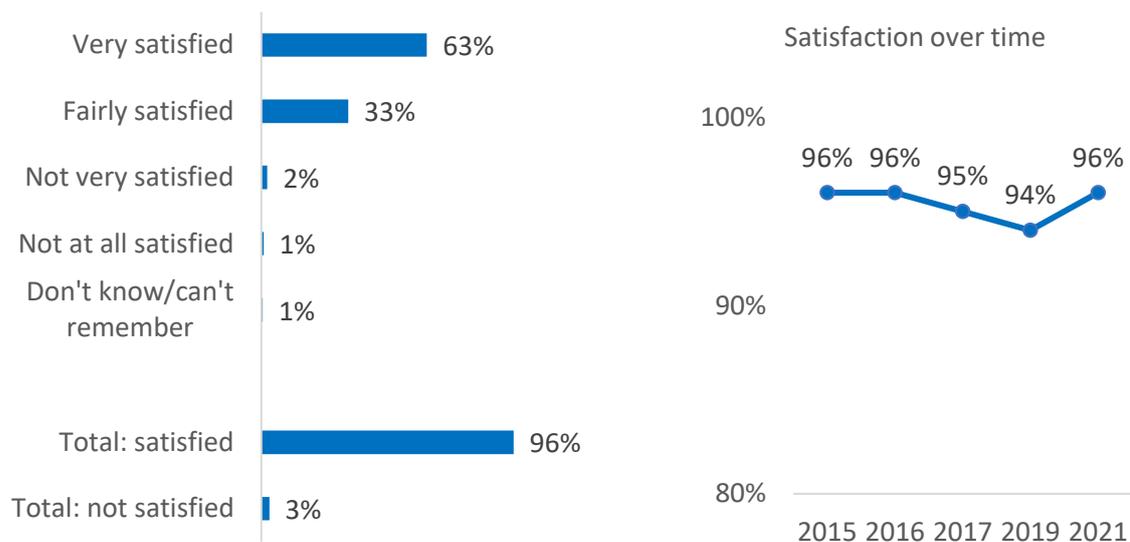
Unweighted sample base: 1,570

Analysis of these responses by nation shows consistently high satisfaction with opticians (England: 96%, Wales: 98%, Scotland: 96%, Northern Ireland: 99%)

In the 2021 survey design, the question recording the time period in which the individual last had a sight test was made more granular, to allow analysis of the experiences of those who have visited an optician during the coronavirus pandemic. Among those who state that their visit to an optician was within the last six months, 96% were satisfied, with just 3% not satisfied. For those whose visit was between six months and 12 months ago, the equivalent figures for satisfaction and dissatisfaction are 96% and 4% respectively.

Echoing the satisfaction levels for the optician who carried out the sight test, 96% of optician visitors during the last two years were satisfied with the overall experience of their opticians visit. This is comprised of 33% who were fairly satisfied and 63% who gave the most positive response possible of very satisfied. Compared to 2019, this headline level of satisfaction has increased marginally by two percentage points from 94%.

*Figure 14: Thinking of the last time you saw an optician, how satisfied or otherwise were you with your overall experience of the opticians? (All those who have visited an optician within the last 2 years)*

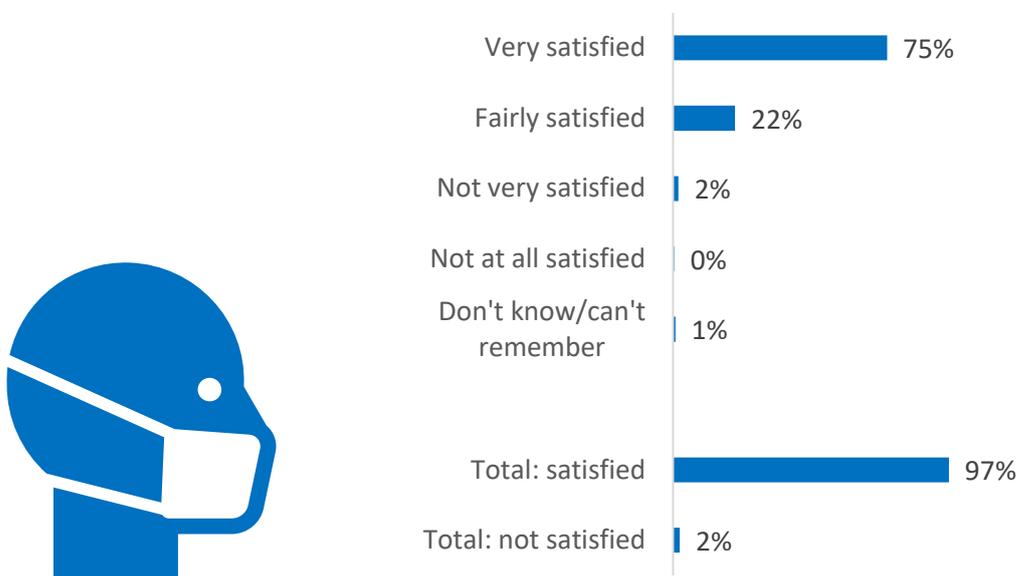


*Unweighted sample base: 1,570*

Again, no notable variations are evident by nation (England: 95%, Wales: 98%, Scotland: 97%, Northern Ireland: 99%). Drilling down to those whose opticians visit was within the last six months 97% percent were satisfied. Among those whose visit was between 6 and 12 months ago, satisfaction levels were at the same level at 96%.

A further question was asked to those who have visited an optician within the last 6 months to rate their satisfaction with the protective measures that were put in place to keep them safe from coronavirus during their visit. As shown by the figure below, the public appear to have high satisfaction with the measures that have been put in place by opticians to avoid current virus transmission. In total, 97% of these most recent optician visitors expressed satisfaction, including 75% who were very satisfied.

*Figure 15: Thinking of the last time you saw an optician, how satisfied or otherwise were you with the protections in place to keep you safe from coronavirus? (All those who have visited an optician within the last 6 months)*



*Unweighted sample base: 487*

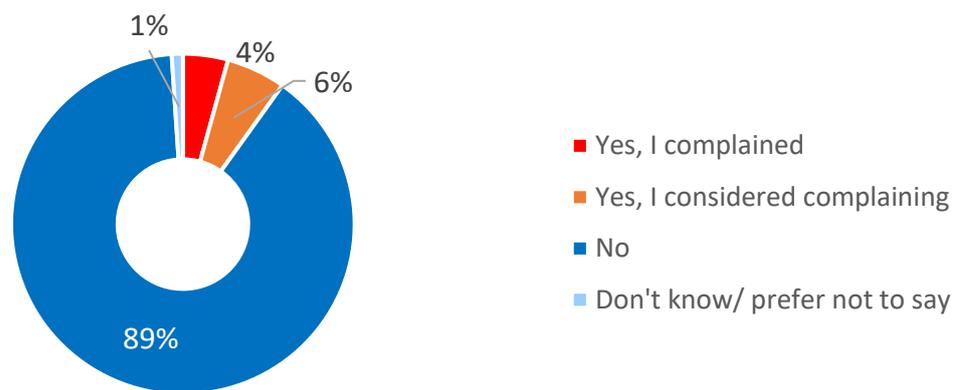
Looking more specifically at those who have been shielding because of COVID-19 (85 individuals to this question), a clear majority of 93% were satisfied with the protections put in place during their visit to the opticians, albeit that this percentage is lower than among those who have not been shielding (98%).

Given the level of service re-design and risk mitigation that the coronavirus pandemic has necessitated for practitioners, these figures which demonstrate strong public confidence in the protections that have been put in place, are an achievement that should be celebrated.

# Adverse experiences and complaints

Questions about complaints were only asked to those who had ever visited an optician. Nine in ten respondents have not complained about an experience with an optician (89%), with 4% having complained and 6% having considered complaining.

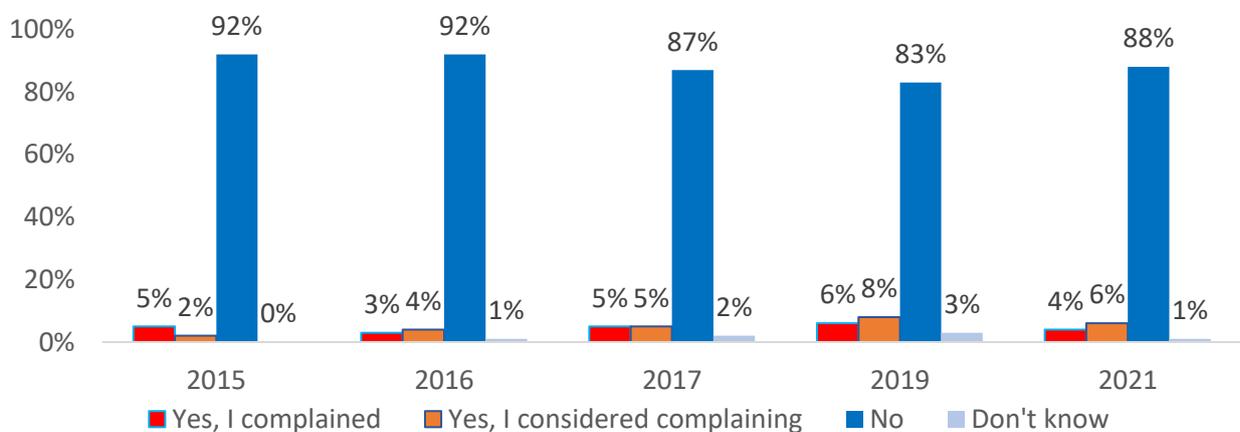
Figure 16: Have you ever complained or considered complaining about an experience with an optician? (All those who have ever visited an optician)



Unweighted sample base: 2,014

Putting the 2021 data into context shows that the 4% who have complained is down 2-percentage points from 2019. There has been the same wave-on-wave drop in those who have considered complaining (now 6%). The 88% who are non-complainants is at the highest level since 2016.

Figure 17: Complaint incidence over time (All those who have ever visited an optician)

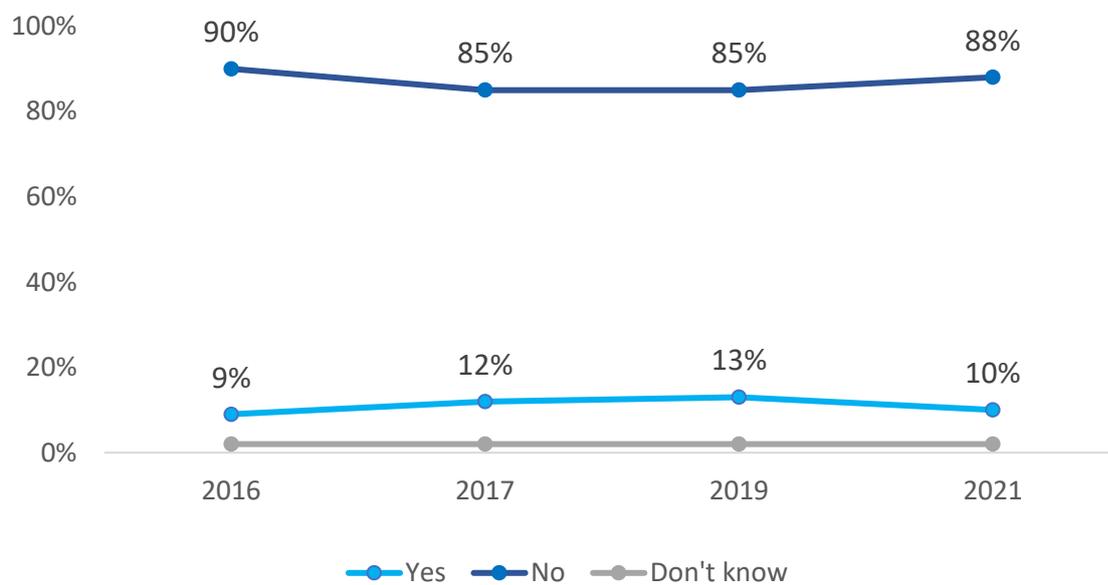


Unweighted sample base: 2021(2014) / 2019 (1,886) / 2017 (2,895) / 2016 (2,983) / 2015(1994)

The Standards of Practice for Optometrists and Dispensing Opticians and Standards for Optical Students requires optical professionals to be candid to patients and customers when something goes wrong and to provide an apology. In this context, questions were included to quantify how frequently something goes wrong for patients and whether they receive an apology when this happens.

Just one in ten (10%) of all respondents indicate that they have ever experienced a situation where something has gone wrong with the care/service they received from an optician. This represents a marginal decline in negative experiences from the 13% recorded in 2019.

*Figure 18: Have you ever experienced a situation where something has gone wrong with the care/service you received from an optician? (All those who have ever visited an optician)*

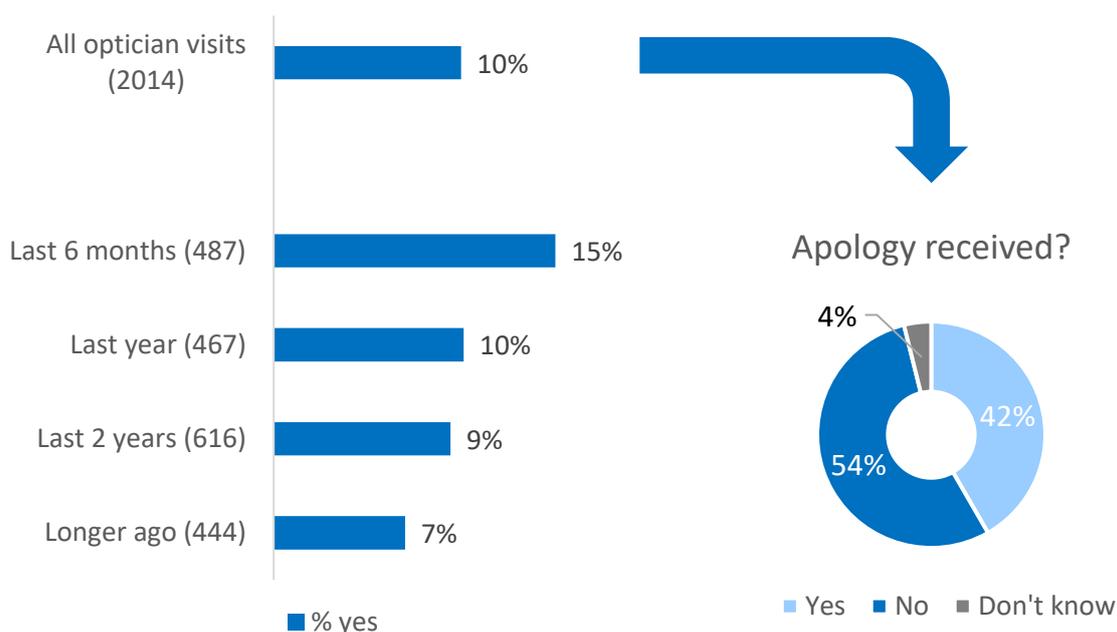


*Unweighted sample base: 2021 (2,014) / 2019 (1,886) / 2017 (2,895) / 2016 (2,983)*

At a nation level, the proportion of individuals who have ever had such an adverse experience with an optician is significantly higher in England, at 12%. In Wales and Northern Ireland the equivalent proportion is 7%, while in Scotland it is 9%.

Interestingly, further analysis shows that the proportion of respondents who say something went wrong is significantly higher for those visiting in the last 6 months (15%) and the last 6-12 months (10%). Further investigation may be required to establish if there are underlying reasons for this variation.

*Figure 19: Have you ever experienced a situation where something has gone wrong with the care/service you received from an optician? (All those who have ever visited an optician)*

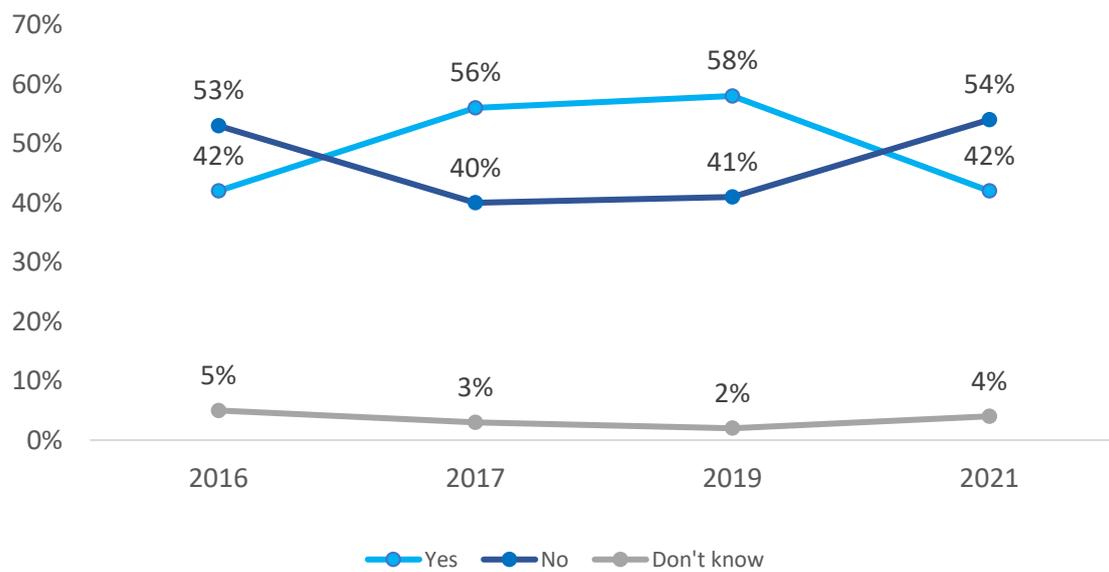


*Unweighted sample base: 2,014/209*

Among those individuals who have ever had something go wrong with the care/service they received from an optician, two in five (42%) indicate that they have received an apology. Those whose opticians visit was in the last 6 months most commonly received an apology (48%), although this proportion is not significantly different to that recorded among those who visited longer ago. While this proportion is highest in England at 45%, there is no significant variation in apology receipt by nation.

As shown in the figure below, in both 2017 and 2019, the majority of those who indicated that they had ever experienced a situation where something had gone wrong with the care/service they received from an optician, received an apology (56% and 58% respectively). With this proportion having now fallen to 42% there may be a need to restate to practitioners the requirement to provide apologies.

*Figure 20: Did you receive an apology as a result? (All those who experienced something going wrong)*

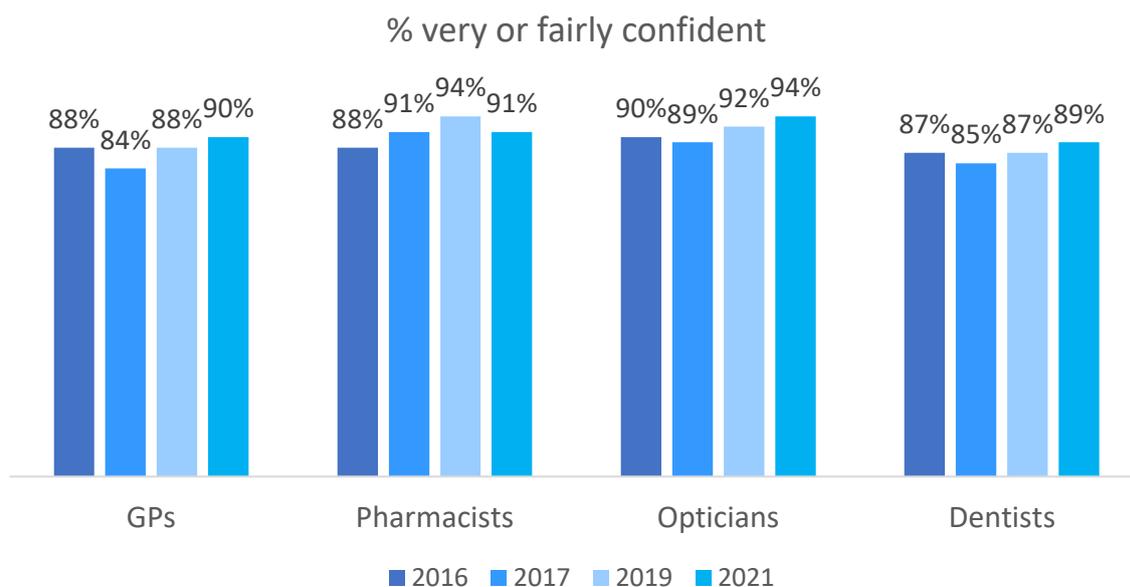
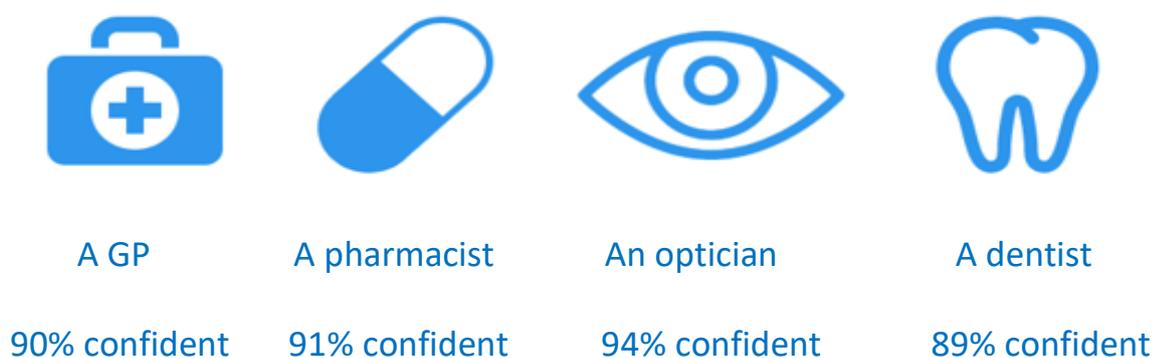


*Unweighted sample base: 2019 (249) / 2017 (356) / 2016 (254)*

# Trust and confidence

Public confidence in the profession that the General Optical Council regulates remains strong. All respondents were asked how confident they were of receiving a high standard of care from GPs, dentists, opticians and pharmacists. As shown in the figure below, nine in ten members of the public express confidence in each of these professions, with 94% being either fairly or very confident in the standard of care from opticians. The 2021 data replicates the historical findings that have shown minimal differentiation in the confidence the public have in the care provided by these four professions.

Figure 21: How confident or otherwise are you of receiving a high standard of care from each of the following healthcare professions?(All respondents)



All respondents 2021 (2087) 2019 (2,000) / 2016 (3,252) / 2015 (2,250)

Exploring the levels of confidence in the care provided by opticians shows that:

- At least nine in ten individuals in each age group have confidence in this profession, but this rises significantly to 97% among those aged 65 and over.
- A clear majority of 89% of non-wearers of glasses or contact lenses have confidence in the care provided by opticians. Among those who do have glasses or contact lenses (by inference those more likely to be optician users), this confidence is significantly higher at 95%.
- Among those who indicate that they have had an adverse experience with an optician (something gone wrong or a cause for complaint), confidence in the care provided by this profession drops to 83%. Although this still represents a strong majority, this proportion is significantly lower than the confidence held by those with no adverse experiences.

## Appendix A: Sample profile

Below is the sample collected prior to the application of weighting.

Country	Count	%
England	1294	62%
Wales	267	13%
Scotland	265	13%
Northern Ireland	261	13%

Age	TOTAL	ENGLAND	WALES	SCOTLAND	NORTHERN IRELAND
	2087	1294	267	265	261
16-24	298	186	37	36	39
	14.28%	14.37%	13.86%	13.58%	14.94%
25-34	334	208	41	42	43
	16.00%	16.07%	15.36%	15.85%	16.48%
35-44	310	196	35	38	41
	14.85%	15.15%	13.11%	14.34%	15.71%
45-54	343	215	41	44	43
	16.44%	16.62%	15.36%	16.60%	16.48%
55-64	327	199	43	43	42
	15.67%	15.38%	16.10%	16.23%	16.09%
65+	475	290	70	62	53
	22.76%	22.41%	26.22%	23.40%	20.31%
Gender	TOTAL	ENGLAND	WALES	SCOTLAND	NORTHERN IRELAND
Male	1020	636	129	126	129
	48.87%	49.15%	48.31%	47.55%	49.43%
Female	1067	658	138	139	132
	51.13%	50.85%	51.69%	52.45%	50.57%

# Appendix B: Questionnaire

## General Optical Council Public Perceptions Research 2021.

This survey is about eye health and your use of opticians. The questions are being asked by M.E.L Research <https://melresearch.co.uk/> an independent research agency.

M.E.L Research fully comply with the Market Research Society Code of Conduct. The information you provide in this survey will be used for research purposes and your own responses will not be shared with anyone else. The M.E.L Research privacy policy which details how data is stored and used can be found here: <https://melresearch.co.uk/page/privacypolicy>

The first two questions are about you.

QA Do you wear glasses or use contact lenses? Click all that apply

Yes - glasses

Yes - contact lenses

No

QB Do you have a medical condition or disability that has required you to be 'shielding' during the coronavirus pandemic?

Shielding means staying home as much as possible, leaving your home only for medical appointments, exercise or if it's essential.

Yes

No

1. 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?  
*Please select one option only*

- A GP
- An eye hospital
- Accident & Emergency
- A pharmacist
- A walk-in clinic
- An optician
- Don't know
- Other *Please specify*

IF OPTICIAN CODED AT Q1 SKIP TO Q2b

2. Why would you choose not to go to an optician first in this situation? *Please select one option only*

- An optician wouldn't be able to treat these kinds of problems
- I might have to pay for the treatment
- Inconvenient location
- Inconvenient opening hours
- I might not be seen by an optician on the same day
- An optician can't prescribe the right medication to treat the problem
- Other
- Don't know

2b. In response to coronavirus restrictions, some opticians have been offering initial appointments by phone and over video calls. Is this a service that you would consider using if you had an eye problem...?

	Yes	No
...during the current coronavirus pandemic	1	2
...when coronavirus restrictions ease in the future	1	2

2. Have you ever felt uncomfortable about visiting an opticians for any of the following reasons? *Please select all that apply*

- Pressure to buy glasses or contact lenses
- Might be told I need glasses
- Fear of being diagnosed with an eye health problem (such as glaucoma or macular degeneration)
- The cost of a sight test (sometimes referred to as an 'eye examination')
- Pressure to book a sight test
- I don't like someone touching/going near my eyes during the sight test
- I don't like someone being physically close to me during the sight test
- Other
- None of the above / I have not felt uncomfortable

3. When was the last time you saw an optician?

- In the last 6 months
- In the last year
- In the last two years
- More than two years ago but less than five years ago
- More than five years ago
- I have never been to an optician -SKIP TO Q4b

Q3b Thinking of the last time you saw an optician, where was this? *Please click one box only*

- In a high street opticians
- In a doctor's surgery
- In a hospital
- In a care home/my own home
- Somewhere else (type in)

4. ASK IF Q4 = WITHIN LAST TWO YEARS (CODED 1-3 AT Q3)

Thinking of the last time you saw an optician, how satisfied or otherwise were you with the following? *Please click one box per row*

	Very satisfied	Fairly satisfied	Not very satisfied	Not at all satisfied	Don't know / can't remember
The optician who carried out your sight test	<input type="checkbox"/>				
IF LAST 6 MONTHS: The protections in place to keep you safe from coronavirus	<input type="checkbox"/>				
Your overall experience of the opticians	<input type="checkbox"/>				

Q4b Thinking about the coronavirus pandemic, have any of these situations applied to you? *Please click one box per row*

	Yes	No
I had a remote (e.g. telephone or video) consultation with an optician	<input type="checkbox"/>	<input type="checkbox"/>
I have delayed/put off making an appointment for a routine sight test	<input type="checkbox"/>	<input type="checkbox"/>
I have avoided seeking advice about an eye problem	<input type="checkbox"/>	<input type="checkbox"/>
I have had problems getting an appointment at/with an optician	<input type="checkbox"/>	<input type="checkbox"/>
I have delayed replacing/buying new glasses	<input type="checkbox"/>	<input type="checkbox"/>
I have changed the way I buy glasses or contact lenses e.g. buying them online rather than on the high street	<input type="checkbox"/>	<input type="checkbox"/>
I went to a different opticians because my usual opticians was closed	<input type="checkbox"/>	<input type="checkbox"/>

ASK IF DELAYED MAKING ROUTINE APPOINTMENT AT Q4b

Q4c Which of these reasons best describes why you delayed/put off making an appointment for a routine sight test? *Tick up to two answers*

- My appointment was due during a 'lockdown' period
- My appointment was due when I was advised to be 'shielding' from coronavirus
- I was not sure if opticians were open/allowing routine appointments
- I did not feel I would be protected from coronavirus at my opticians
- Financial concerns e.g. the cost of new glasses
- Lack of time e.g. work/childcare pressures
- Other (please type in)

Q4d When do think you will next see an optician? *Tick one box only*

- In the next 3 months
- In the next 6 months
- In the next 12 months
- Further into the future
- I do not plan to go to the opticians
- Don't know

5. When you think about the following, do you think of them primarily as a healthcare service, a retailer or a combination of both?

	A healthcare service	A retailer	A combination of both	Don't know
An optician	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
A GP	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
A dentist	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
A pharmacist	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

6. ASK IF Q3 = EVER VISITED AN OPTICIAN

Have you ever complained or considered complaining about an experience with an optician?

- Yes, I complained
- Yes, I considered complaining
- No
- Don't know
- Prefer not to say

7. ASK IF Q3 = EVER VISITED AN OPTICIAN

Have you ever experienced a situation where something has gone wrong with the care/service you received from an optician?

- Yes
- No
- Don't know

8. ASK IF Q7 = YES

Did you receive an apology from the optician as a result?

- Yes
- No
- Don't know

9. How confident or otherwise are you of receiving a high standard of care from each of the following healthcare professions?

	Very confident	Fairly confident	Not very confident	Not at all confident	Don't know
An optician	<input type="checkbox"/>				
A GP	<input type="checkbox"/>				
A dentist	<input type="checkbox"/>				
A pharmacist	<input type="checkbox"/>				

Q10 Finally, we would like to ask a question about two roles in the eye care profession. These are **dispensing opticians** and **optometrists**. If you are not sure of the answers, your best guess is fine.

Which of these do you think... MULTICODE POSSIBLE

	A dispensing optician	An optometrist
Is the most senior/highly qualified role	<input type="checkbox"/>	<input type="checkbox"/>
Has responsibility for conducting a sight test	<input type="checkbox"/>	<input type="checkbox"/>
Has responsibility for writing prescriptions for glasses/contact lenses	<input type="checkbox"/>	<input type="checkbox"/>
Fits and tests glasses and contact lenses	<input type="checkbox"/>	<input type="checkbox"/>

Thank you. We asked the last question as the term 'optician' is commonly used to describe the role of an 'optometrist'.

**Optometrists** examine eyes, test sight and prescribe spectacles or contact lenses for those who need them. They also fit spectacles or contact lenses, give advice on visual problems and detect any ocular disease or abnormality, referring the patient to a medical practitioner if necessary.

**Dispensing opticians** advise on, fit and supply the most appropriate spectacles after taking account of each patient's visual, lifestyle and vocational needs. They also play an important role in advising and dispensing low vision aids to those who are partially sighted as well

as advising on and dispensing to children where appropriate. They are also able to fit contact lenses and provide aftercare for contact lenses after undergoing further specialist training.



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