Where Consumers Shop for Eyewear

December 2025

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Key findings

Key facts to share

STATE OF THE INDUSTRY

Amid economic pressures, consumers gravitate to quality, health and convenience

Global value sales growth continues in 2025, albeit at a slower rate

Switzerland leads per capita spend on eyewear, while coloured lenses boom in Asia

Myopia control products see fastest value growth, while spectacles remain top category

Rising incomes and urbanisation fuel growth in Asia, Latin America and Eastern Europe

Eyewear consumption patterns vary across categories and generations

Offline retail stays dominant, while investment in omnichannel is key for future growth

Robust growth across online and offline channels in global eyewear over 2020-2025

OFFLINE RETAIL

Optical stores lead, benefiting from quality demand; hypermarkets succeed on price

Warehouse clubs see growth by appealing to budgeteers; apparel specialists diversify

Optical goods stores capitalise on consumer demand for expertise and one-stop shop

Staples' destination for work and lifestyle strategy expands to include eyewear

Rising costs continue to push consumers to look for cheaper options like private label

Japanese JINS opens concept store in US offering 30 minute on-site dispatch of glasses

RETAIL E-COMMERCE

E-commerce makes a shift to social commerce with key focus on convenience and price

RETAIL E-COMMERCE

Aqualens uses social media in India through a robust influencer marketing strategy

RETAIL E-COMMERCE

The US leads the global e-commerce market, while sales are surging in China

Could Amazon's entry in eyewear in Germany pose a threat to local competitors?

Sunglasses and contact lenses outperformed spectacles in e-commerce 2020-2025

Asia Pacific drives e-commerce expansion, surpassing North America

Online Indian retailer Lenskart's 2025 IPO funds earmarked for investment in technology

CONCLUSION

Evolution of distribution within retailing in eyewear

CONCLUSION

Recommendations/how to win

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