



Where Consumers Shop for Eyewear

January 2023

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Key findings

INDUSTRY SNAPSHOT

Eyewear sees significant bounce back in value sales following the pandemic

The global economy is facing an increasingly uncertain outlook

Driven by concerns for wellness, all eyewear categories grew in 2022

North America leads sales, with Asia Pacific and Western Europe close behind

CHANNEL SHIFTS

Physical stores still relevant despite the rise in e-commerce

Spectacles sees largest growth in e-commerce in eyewear

North America, Asia and Western Europe are important regions for digital expansion

STORE-BASED CHANNELS

Optical stores still remain the leading channel in eyewear

Discounters performer well during a period of immense financial strain

Value sales of optical good stores exceed pre-pandemic levels in 2022

The pandemic and cost of living crisis drive up National Vision Inc's ranking

The cost of living crisis pushes consumers to look for cheap alternatives such as private label

France and the UK dominate private label in eyewear

NON-STORE CHANNELS

Despite slowing growth, the US is the largest non-store retailing market

Convenience and demand for value-driven products is driving e-commerce growth

NON-STORE CHANNELS

Warby Parker offers affordable lenses through new direct-to-consumer offering Scout

Contact lenses remains the category with the highest e-commerce share

Spectacles and sunglasses outperform contact lenses and solutions in 2021 and 2022

North America maintains leading position in e-commerce in 2022

Amazon Fashion's partnership with Snap in virtual try-ons seen as threat to optical retailers

Barriers to e-commerce growth in South Korea and Taiwan

Germany offers opportunities for penetration gains in e-commerce

FUTURE DEVELOPMENTS

Global eyewear industry to exceed pre-COVID-19 levels by 2025

Economic uncertainty in Europe expected to impact business and consumers

The future of eyewear retail is a hybrid model

Gentle Monster tech-focused global flagship opens in Beijing, setting the bar for eyewear

Virtual try-ons and phygital reality are here to stay

French online retailer Polette Eyewear: A glimpse of the forthcoming phygital retail eyewear

Warby Parker's long-term plans to increase its physical footprint in suburban areas

Gentle Monster invites consumers to a phygital experience with its Jentle Garden app

Virtual eye exams are on the way: Eesee to pilot first clinically proven online test

Molsion Glasses harnesses PR engagement through KOL marketing in China

The rise of digital health services in eyewear

More digital health services in 2023: Specsavers RemoteCare consultation service in the UK

Key takeaways

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