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The Vision Council Releases New Research Spotlighting Optical Market Trends for Second Quarter of 2025

Alexandria, Va. – August 29, 2025 – Today, The Vision Council released new market data and analysis reporting on the performance of the \$17.4 billion optical industry for the second quarter of 2025. The [**Market inSights Q2 2025**](#) report reveals industry performance across a variety of categories, including eye exams, eyeglasses, frames, lenses, contact lenses, readers and plano sunglasses.

As is expected with seasonal shopping trends inherent in the optical sector, the second quarter of 2025 saw a \$800 million decline in sales compared to the first quarter. The market value also experienced a year-over-year decline of 1.5 percent. All products, except for plano sunglasses, also experienced a decline in sales volume from the first quarter of the year.

“The second quarter data reflects both the challenges and resilience within the optical industry,” said **Alysse Henkel, Vice President of Research and inSights**. “While overall market value softened compared to the first quarter, we continue to see consistent demand for core vision care, including comprehensive eye exams and prescription lenses. At the same time, consumer preferences show a willingness to pay more per exam or frame — suggesting that consumers are still investing in their eyecare and eyewear even as sales volumes have decreased. These patterns provide valuable insight for businesses as they navigate a changing marketplace and plan for the remainder of 2025.”

Key Highlights from Q2:

- The market value of exams for Q2 2025 is 14 percent higher than Q2 2024, but the market volume decreased year-over-year by 4.5 percent. With these estimates, the average value of an exam in Q2 is almost \$17 more than it was one year ago.
- Lenses led the prescription market in value and were up nearly four percent from Q2 2024.
- Compared to 2024, the volume of frames sold is down, while the average value of a pair of frames has increased by an estimated \$21.
- The average value of a pair of plano sunglasses purchased decreased both year-over-year and quarter-over-quarter.
- The market volume of readers remained steady compared to Q1 2025, but overall, the market volume and value for readers has decreased since Q2 2024.
- The contact lenses market had a seven percent decrease in volume compared to Q2 2024, but only a one percent decrease compared to Q1 2025.

The 2025 quarterly estimates are based on a variety of data sources, including consumer retail credit card spending data, patient billing and payment data, and optical retail location data, along with a robust consumer survey program. The data sources used in this report are routinely updated. Adjustments may be made to previously published estimates.

The full report is available in The Vision Council's [Research Download Center](#). Members of The Vision Council can access immediately at no cost, while non-members can purchase the report directly for \$1,000.

For more information about the Market inSights report or The Vision Council's research program, visit thevisioncouncil.org.

About the inSights Research Program

The Vision Council's [inSights Research Program](#) is built on a foundation of rigorous methodology and cutting-edge technology. The inSights Research Program provides a comprehensive perspective on the state of the optical industry through quarterly consumer survey reports; in-depth special reports on eyewear and eyecare products and topics; and an end-of-year market estimate and industry forecast.

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About The Vision Council

The Vision Council brings the power of sight to all through education, government relations, research, and technical standards. A leading advocate for the optical industry, the association positions its members to deliver the eyewear and eyecare people need to look and feel their best. Vital to health, independence, and safety, better vision leads to better lives.