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

Alexandria, VA – December 3, 2025 – The Vision Council today released new market data and analysis detailing the performance of the \$17.5 billion optical industry in the third quarter of 2025. The [**Market inSights Q3 2025**](#) report examines trends across key categories, including eye exams, eyeglasses, frames, lenses, contact lenses, readers, and plano sunglasses.

The report also incorporates updated Q2 data, reflecting newly available practice and transaction information. These revisions show a clearer picture of how consumer behavior shifted following the spring tariff announcements, with patients spending more on prescription products than originally reported. In Q3, all prescription categories experienced a decline in sales volume both quarter-over-quarter and year-over-year. Yet, when comparing year-over-year results, overall market value increased even as unit volume decreased – a continuation of patterns observed in earlier quarters.

“Through the latest release of our quarterly Market inSights report, we’re able to see more clearly how consumer behavior is evolving across the vision care market,” said **Alysse Henkel, Vice President of Research and inSights**. “While prescription product volumes declined in the third quarter, overall market value continued to climb to \$17.5 billion, in line with patterns reported earlier this year. At the same time, over-the-counter categories showed sustained consumer demand.”

Key Highlights from Q3:

- The market value of exams in Q3 2025 is 9% higher than Q3 2024, while the market volume decreased 4% year-over-year. The average cost of an exam declined from Q2 but remains higher than in Q1 2025.
- Lenses led the prescription market with a value of almost \$4 billion, 9% lower than Q2.
- Compared to 2024, the volume of frames sold declined, while the average value of a pair of frames increased by an estimated \$13.
- Plano sunglasses saw increases in both average value and volume year-over-year and quarter-over-quarter.
- The market value of readers held steady compared to Q2 2025, while a small increase in volume led to a lower average price per pair.
- The market value of contact lenses remained the same quarter-over-quarter, though the average price per unit increased.

The 2025 quarterly estimates are informed by a diverse set of data sources, including consumer retail credit card spending, patient billing and payment data, optical retail location data, and an extensive consumer survey program. The data sources used in this report are routinely updated, and 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.