



Scan the QR code to learn more about The Vision Council's industry research.

RESEARCH

From consumer trends to industry perspectives, The Vision Council's **inSights Research Program** delivers the timely, usable data and in-depth analysis members need to succeed. Built on a foundation of rigorous methodology and cutting-edge technology, The Vision Council inSights Research Program provides a comprehensive perspective on the state of the optical industry through quarterly consumer survey reports, quarterly eyecare provider survey reports, quarterly in-depth special reports on eyewear and eyecare products and topics, and an end-of-year market estimate and industry forecast.

2022 Quick inSights Stats:

\$3.8M

in value of free research reports downloaded by members in 2022

Reports released in 2022: **54**

>4,300 free reports downloaded in 2022

THE VISION COUNCIL INSIGHTS RESEARCH PROGRAM 2023 ROADMAP

The chart below indicates the reports that will be released in 2023.

	Q1	Q2	Q3	Q4
Market inSights	✓			
Consumer inSights	✓	✓	✓	✓
Provider inSights	✓	✓	✓	✓
Focused inSights	<ul style="list-style-type: none"> Managed Vision Care 	<ul style="list-style-type: none"> Frames Sunglasses 	<ul style="list-style-type: none"> Equipment Purchases Smart Eyewear Telehealth 	<ul style="list-style-type: none"> Myopia Management Lenses

REPORT TYPES OVERVIEW & SCHEDULE

CONSUMER INSIGHTS

Quarterly summary of revised monthly consumer survey discussing vision correction, eye exams, frames and lens purchases, contact lenses, Plano sunglasses, and over-the-counter readers. Data is representative of the U.S. adult population, with 15,000 respondents per quarter.

PROVIDER INSIGHTS

Quarterly summary of monthly eyecare provider survey about their practice, economic sentiment, telehealth offerings, staffing, and other rotating topics.

FOCUSED INSIGHTS

In-depth special interest reports on topics important to members. In 2022, the four Focused inSights reports included: consumer decision-making related to products and providers, digital habits, frames, and lenses. Data sources for these reports include ad-hoc consumer surveys and transaction data (when applicable).

INDUSTRY DATA INSIGHTS

Member-reported data benchmarking programs for select product categories facilitated by an external partner. Participating companies provide data quarterly through a secure online portal that prepares anonymized aggregate reports ensuring data confidentiality. The Industry Data inSights online portal allows only participating members to access and download reports that benchmark their submitted data to the aggregate results.

MARKET INSIGHTS

Annual market estimates of market size. These reports will also include forecasts for the coming year using predictive analytics. These reports will rely on consumer survey data, transaction data, government publications, and member-reported data to create the market size estimates and forecast.

INDUSTRY DATA SAMPLE

The following report reflects the results of The Vision Council's new model for estimating the size of the optical industry. The 2022 estimates contain data from new and updated sources, including consumer retail expenditure data, patient billing and payment data, and optical retail location data, along with an updated consumer survey program. Advanced analytics, using modern data infrastructure, were applied with methodological rigor to develop the new market model from these comprehensive sources.

Key takeaways for 2022:

- The overall size of the optical retail industry in 2022 was \$76.5 billion
- There are more than 48,000 brick and mortar optical retail locations in the United States
- Lenses made up nearly one-third of the market with a value of \$23.6 billion
- There were 98 million frames sold for a total value of \$12.1 billion
- Between patient spending and managed vision care reimbursements, \$15.27 billion was spent on eye exams
- There were \$7.6 billion in sales of plano sunglasses and readers

ACCESS REPORTS

Visit the [Research Download Center](#), where more than 100 reports are free for members, who also receive ~50% discount on paid reports, including custom research surveys and programs. If you are interested in purchasing multiple reports, custom research or annual subscriptions, or have trouble accessing the research center, please contact Alysse Henkel, Senior Director, Market Research & Analytics at ahenkel@thevisioncouncil.org.