

Optical Goods Retailing - UK - February 2021

Report Price: £2195 | \$2995 | €2600

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

This report looks at the following areas:

With optical goods retailers and specialists closed during the first lockdown and just 14% of people who bought spectacles over the last two years doing so online, the category suffered as practices had little to no sales for several months of the year.

Initially, COVID-19 was a huge blow to the industry. However, practices have been allowed to remain open during the two subsequent lockdowns across the UK, providing some much-needed respite. Even with practices now open, many do not have the capacity to see the same number of patients as rooms need to be deep-cleaned between appointments, and many are still reluctant to go in for an eye test as fears of catching the virus remain.

One of the major threats to the market is the decline in consumer confidence. The optical retail market is already one that is very competitive on price, and with many struggling financially, it is likely to become even more so, with Boots Opticians already advertising its ranges by showcasing their affordability. Many will start to trade down as people are reluctant to make any big purchases.

Nevertheless, there are plenty of opportunities in the sector. COVID-19 has heightened people's awareness around their health, and with people spending so much time looking at screens, they are likely to start to prioritise eye health, an area that has previously been neglected, particularly by younger generations. Furthermore, with people spending more time looking at themselves on screen, they could also be persuaded to update their style with a new pair of glasses.

Issues covered in the Report:

- The impact of COVID-19 on the optical goods market
- Channels used to shop for optical goods



"In the immediate aftermath of the COVID-19 outbreak in the UK, the optical goods and services market suffered large declines as stores were forced to close. This has led some chains to rethink their store positions as city centres and shopping centres remain quiet even with stores re-opened."

- Chana Baram, Senior Retail Analyst

Buy this report now

Visit	store.mintel.com
EMEA	+44 (0) 20 7606 4533
Brazil	0800 095 9094
Americas	+1 (312) 943 5250
China	+86 (21) 6032 7300
APAC	+61 (0) 2 8284 8100

- Reasons why people purchased optical goods online or in-store
- Consumer behaviour towards optical goods
- Interest in innovations within the optical goods sector

What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

Did you know?

This report is part of a series of reports, produced to provide you with a more holistic view of this market.

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Buy this report now

Visit store.mintel.com

EMEA +44 (0) 20 7606 4533

Brazil 0800 095 9094

Americas +1 (312) 943 5250

China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100

Table of Contents

OVERVIEW

- **Issues covered in the Report:**
- **COVID-19: Market context**
- **Economic and other assumptions**
- **Products covered in this Report**
- **Excluded**

EXECUTIVE SUMMARY

- **Impact of COVID-19 on optical goods**
Figure 1: Short, medium and long-term impact of COVID-19 on optical goods, January 2021
- **The market**
- **Market size and forecast for optical goods and services**
Figure 2: Consumer spending on optical goods and services, 2015-25 (prepared on 2 February 2021)
- **Sunglasses sector suffers as travel declines**
Figure 3: Consumer spending on non-prescription sunglasses, 2015-25 (prepared on 2 February 2021)
- **Sales of spectacles suffered, but contact lenses saw largest decline**
Figure 4: Consumer spending on optical goods and services, by category, 2019-20
- **Companies and brands**
- **Specsavers has highest number of shoppers, but use has declined in the last year**
Figure 5: Key metrics for selected brands, January 2021
- **Advertising spend more than halves, highlighting a missed opportunity**
Figure 6: Leading opticians above-the-line, online display and direct mail advertising expenditure, 2020
- **The consumer**
- **Concerns around COVID-19 have made many uncomfortable trying items on in-store**
Figure 7: People's feelings towards trying clothing or footwear on in-store, 10-19 November 2020
- **There have been declines in the number of people getting examined**
Figure 8: Number of people going for eye and hearing examinations in the last two years, 2019-20
- **Many go back to the same optician out of habit**
Figure 9: Reasons for choosing an optician, October 2020
- **Eyewear purchasing has declined over the last year**

What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

Did you know?

This report is part of a series of reports, produced to provide you with a more holistic view of this market.

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Buy this report now

Visit	store.mintel.com
EMEA	+44 (0) 20 7606 4533
Brazil	0800 095 9094
Americas	+1 (312) 943 5250
China	+86 (21) 6032 7300
APAC	+61 (0) 2 8284 8100

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Figure 10: Eyewear and hearing aids purchased in the last two years, 2019–20

- **Contact lenses are most likely item to be bought online**

Figure 11: Channels used for purchasing eyewear, October 2020

- **Ability to try styles on keeps people going to stores**

Figure 12: Reasons eyewear was purchased in-store, October 2020

- **A third would be interested in being able to try on glasses virtually**

Figure 13: Eyewear shoppers interested in innovations in the sector, October 2020

- **Many are worried about the effect screens have on eyesight**

Figure 14: Behaviours around protecting eyes from screen use, October 2020

ISSUES AND INSIGHTS

- **Opportunities for the spectacles market since COVID-19**
- **Technology**

Figure 15: Trying on Cubitts' 'Bingfield' frames with its virtual try-on technology, 2021

- **Style**

Figure 16: Pricing transparency at Bloobloom, 2021

- **Sustainability**

Figure 17: Use of reusable packaging in online shopping, 2020

- **Innovations and opportunities in the contact lens market**

THE MARKET – KEY TAKEAWAYS

- **COVID-19 causes disruption to the market**
- **Spectacles sales decline as people are concerned about finances**
- **Contact lens market sees big losses as people stay home**
- **An ageing population is expected to provide future growth**

MARKET SIZE AND FORECAST

- **COVID-19 is unlikely to have a long-lasting impact on the sector**

Figure 18: Short, medium and long-term impact of COVID-19 on the optical goods market, January 2021

- **Forced store closures led to a 10% decline in optical goods and services**

Figure 19: Consumer spending on optical goods and services, 2015–25 (prepared on 2 February 2021)

What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

Did you know?

This report is part of a series of reports, produced to provide you with a more holistic view of this market.

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Buy this report now

Visit store.mintel.com

EMEA +44 (0) 20 7606 4533

Brazil 0800 095 9094

Americas +1 (312) 943 5250

China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100

Figure 20: Consumer spending on optical goods and services, 2015–20

- **Reduction in capacity has made recovery challenging, even with practices open**
- **The non-discretionary nature of the category will aid recovery**
- **The sunglasses sector has taken a big hit from COVID-19**

Figure 21: Consumer spending on non-prescription sunglasses, 2015–25 (prepared on 2 February 2021)

Figure 22: Consumer spending on optical goods and services, 2015–20

- **Market drivers and assumptions**
- **Learnings from the last recession**

Figure 23: Consumer spending on optical goods and services, 2007–12

- **Forecast methodology**

MARKET SEGMENTATION

- **Spectacles continue to make up the bulk of spending**

Figure 24: Consumer spending on optical goods and services, 2015–20

- **Share of market for contact lenses declines as people stay home**

Figure 25: Consumer spending on optical goods and services, by category, 2019–20

- **COVID-19 restrictions have a negative effect on eye testing...**
- **...previously the number receiving eye examinations had been growing**

Figure 26: Number of NHS eye examinations in England, 2015–20

MARKET DRIVERS

- **Ageing population could drive future market growth**

Figure 27: Trends in the age structure of the UK population, 2015 – 25

- **Wages dive during lockdown as COVID-19 triggers economic downturn**

Figure 28: Average weekly earnings, by consumer price index, January 2016–December 2020

- **Uncertainty around Brexit likely to lead to further slowdown**

Figure 29: Economic outlook towards Brexit, January 2021

What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

Did you know?

This report is part of a series of reports, produced to provide you with a more holistic view of this market.

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Buy this report now

Visit store.mintel.com

EMEA +44 (0) 20 7606 4533

Brazil 0800 095 9094

Americas +1 (312) 943 5250

China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

- **Lack of overseas holidays has badly affected sunglasses market**

- **Increased time on video could help the glasses market**

Figure 30: Video calling and live streaming, 2-14 July 2020

COMPANIES AND BRANDS – KEY TAKEAWAYS

- **Specsavers ramps up Sainsbury's concessions...**
- **... while Boots Opticians plans store closures**
- **Advertising spend more than halves, highlighting a missed opportunity**

LEADING OPTICAL GOODS RETAILERS

- **Specsavers is a market leader**

Figure 31: Leading optical goods retailers' net revenues (excluding VAT), 2015-19

- **Boots plans to reduce store numbers**

Figure 32: Leading optical goods retailers' outlet numbers, 2015-20

- **Duncan & Todd moves into Black & Lizars locations**
- **Bayfields Opticians ramps up expansion plans**
- **Fashion optical chain Cubitts opens outside London**

LAUNCH ACTIVITY AND INNOVATION

- **Custom-tailored glasses**

Figure 33: Virtual appointment from Topology for custom frames, 2020

- **Giving old frames a second life**
- **Eco-friendly eyewear**
- **Coral eyewear makes use of ocean plastics**
- **Vinylize turns vinyl records into frames**

Figure 34: Vinylize's AC/DC collection, 2020

- **Stella McCartney teams up with Thélios for sustainable eyewear collection**

- **Formula 1 celebrates anniversary with eyewear launch**
- **Reimagining the in-store optical experience**
- **Hungry Eyes opens party-inspired boutique**

Figure 35: Hungry Eyes boutique in Stuttgart, 2020

- **Vinylize launches pop-up salon in members-only bar in Budapest**

- **Online spectacles purchasing and home delivery**

Figure 36: Specsavers contact lens service, 2020

- **Pair for a pair**
- **Video consultation service**
- **'Smart' eyewear**

What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

Did you know?

This report is part of a series of reports, produced to provide you with a more holistic view of this market.

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Buy this report now

Visit store.mintel.com

EMEA +44 (0) 20 7606 4533

Brazil 0800 095 9094

Americas +1 (312) 943 5250

China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100

Figure 36: AYO light therapy glasses, 2021

ADVERTISING AND MARKETING ACTIVITY

- **Significant fall in advertising spend following outbreak of COVID-19**

Figure 37: Total above-the-line, online display and direct mail advertising expenditure by UK opticians, 2016-20

- **Five retail brands account for 96% of sector advertising spend**

Figure 38: Leading opticians above-the-line, online display and direct mail advertising expenditure, 2020

- **Specsavers highlight colleague's efforts during COVID-19 lockdown**

- **Vision Express appoint new lead agency**

- **Boots focus on stylish own-brand glasses**

Figure 39: Leading opticians above-the-line, online display and direct mail advertising expenditure, 2016-20

- **TV advertising spend up, direct mail expenditure significantly down**

Figure 40: Total above-the-line, online display and direct mail advertising expenditure by UK opticians, by media type, 2020

- **Nielsen Ad Intel coverage**

BRAND RESEARCH

- **Brand map**

Figure 41: Attitudes towards and usage of selected brands, January 2021

- **Key brand metrics**

Figure 42: Key metrics for selected brands, January 2021

- **Brand attitudes: Specsavers offers good value**

Figure 43: Attitudes, by brand, January 2021

- **Brand personality: Boots Opticians accessible and ethically-minded**

Figure 44: Brand personality – Macro image, January 2021

- **Sunglass Hut stylish, David Clulow aspirational**

Figure 45: Brand personality – Micro image, January 2021

- **Brand analysis**

- **Specsavers near universal brand awareness and highest brand usage**

Figure 46: User profile of Specsavers, January 2021

- **Sunglass Hut fun and stylish, but expensive**

Figure 47: User profile of Sunglass Hut, January 2021

What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

Did you know?

This report is part of a series of reports, produced to provide you with a more holistic view of this market.

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Buy this report now

Visit store.mintel.com

EMEA +44 (0) 20 7606 4533

Brazil 0800 095 9094

Americas +1 (312) 943 5250

China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

- **Vision Express welcoming and inexpensive**
Figure 48: User profile of Vision Express, January 2021
- **Boots Opticians trustworthy and reliable, but lacks style and desirability**
Figure 49: User profile of Boots Opticians, January 2021
- **David Clulow authoritative and an excellent customer experience**
Figure 50: User profile of David Clulow, January 2021

THE CONSUMER – KEY TAKEAWAYS

- **Declines in travel have been damaging for the sunglasses market**
- **There are opportunities to increase the appeal of contact lenses**
- **Revamping the in-store experience grows in importance**

IMPACT OF COVID-19 ON CONSUMER BEHAVIOUR

- **Majority are worried about exposure to COVID-19...**
Figure 51: People worried about their exposure to COVID-19, 20 March 2020–12 February 2021
- **...leading to concerns around trying items on in-store**
Figure 52: People's feelings towards trying clothing or footwear on in-store, 10–19 November 2020
- **Financial uncertainty means many are putting off major purchases**
Figure 53: Financial changes happening in households since COVID-19, 4–12 February 2021
- **A third don't intend to book a holiday in 2021...**
Figure 54: Holiday booking intentions for 2021, 21–26 January 2021
- **...and two in five expect to holiday in the UK**
Figure 55: Holiday destinations in 2021, 21–26 January 2021

EYE AND HEARING TESTS

- **Decline in the number of people getting examined**
Figure 56: Number of people going for eye and hearing examinations in the last two years, 2019–20
- **Older age groups are most likely to go for an eye test**
Figure 57: Number of people going for eye and hearing examinations in the last two years, by age group, October 2020

REASONS FOR CHOOSING AN OPTICIAN

- **Over two in three want familiarity**

What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

Did you know?

This report is part of a series of reports, produced to provide you with a more holistic view of this market.

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Buy this report now

Visit store.mintel.com

EMEA +44 (0) 20 7606 4533

Brazil 0800 095 9094

Americas +1 (312) 943 5250

China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Figure 58: Reasons for choosing an optician, October 2020

- **Younger shoppers are interested in recommendations and style**

Figure 59: Reasons for choosing an optician, by age group, October 2020

PURCHASING OF EYEWEAR

- **Purchasing has declined over the last year**

Figure 60: Eyewear and hearing aids purchased in the last two years, 2019-20

- **Nearly half bought into just one category**

Figure 61: Eyewear purchases made, October 2020

RETAILERS AND CHANNELS USED

- **Contact lenses are most likely item to be bought online**

Figure 62: Channels used for purchasing eyewear, October 2020

- **Most buy fashion sunglasses from clothing retailers**

Figure 63: Types of retailers used for sunglasses, October 2020

REASONS FOR CHANNEL USED

- **Price is the top reason people used online**

Figure 64: Reasons eyewear was purchased online, October 2020

- **Ability to try styles on keeps people going to stores**

Figure 65: Reasons eyewear was purchased in-store, October 2020

- **Older shoppers want specialist advice**

Figure 66: Eyewear shoppers who like in-store specialist advice, October 2020

INTEREST IN EYEWEAR INNOVATIONS

- **A third would be interested in being able to try on glasses virtually**

Figure 67: Eyewear shoppers interested in innovations in the sector, October 2020

- **Men are interested in the concept of remote sight tests**

Figure 68: Eyewear shoppers interested in innovations in the sector, by gender, October 2020

BEHAVIOUR TOWARDS EYEWEAR

- **Buying glasses tends to be out of necessity**

What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

Did you know?

This report is part of a series of reports, produced to provide you with a more holistic view of this market.

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Buy this report now

Visit store.mintel.com

EMEA +44 (0) 20 7606 4533

Brazil 0800 095 9094

Americas +1 (312) 943 5250

China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Figure 69: Behaviour towards purchasing at opticians, October 2020

- **Since COVID-19 people are more likely to shop local**

Figure 70: Behaviour towards opticians during COVID-19, October 2020

- **Many are worried about the effect screens have on eyesight...**

Figure 71: Behaviours around protecting eyes from screen use, October 2020

- **...particularly among those who have likely been working from home**

Figure 72: Optical Goods Retailing – CHAID – October 2020

Figure 73: Optical Goods Retailing – CHAID – Table output, October 2020

- **Methodology**

APPENDIX – DATA SOURCES, ABBREVIATIONS AND SUPPORTING INFORMATION

- **Abbreviations**
- **Consumer research methodology**

APPENDIX – MARKET SIZE AND FORECAST

- **Forecast methodology**
- **Optical goods and services forecast**

Figure 74: Consumer spending on optical goods and services, 2015–25

Figure 75: Forecast consumer spending on optical goods and services, 2015–25

- **Non-prescription sunglasses forecast**

Figure 76: Consumer spending on non-prescription sunglasses, 2015–25

Figure 77: Forecast consumer spending on non-prescription sunglasses, 2015–25

What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

Did you know?

This report is part of a series of reports, produced to provide you with a more holistic view of this market.

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Buy this report now

Visit store.mintel.com

EMEA +44 (0) 20 7606 4533

Brazil 0800 095 9094

Americas +1 (312) 943 5250

China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100



About Mintel

Mintel is the **expert in what consumers want and why**. As the world's leading market intelligence agency, our analysis of consumers, markets, product innovation and competitive landscapes provides a unique perspective on global and local economies. Since 1972, our predictive analytics and expert recommendations have enabled our clients to make better business decisions faster

Our purpose is to help businesses and people grow. To find out how we do that, visit **[mintel.com](https://www.mintel.com)**.