

## Optical Goods Retailing - UK - February 2014

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"This is a highly competitive market place, with three major chains dominating distribution and now facing intensifying competition from growing chains of supermarket opticians. So the big three are competing hard with special offers, intensive advertising campaigns, some online services and by growing their store chains."  
— Jane Westgarth, Senior Market Analyst

### This report looks at the following areas:

- Are supermarket opticians a real threat?
- What are mature opticians doing to grow sales?
- Will laser surgery depress demand for spectacles and contact lenses?
- How important are online sales and will more people shop online?
- What role does health play in forging demand for sunglasses?

Visiting the optician is the gateway to sales of optical goods in this regulated industry. People must have an eye examination by a qualified professional in order to get a prescription and once they have a prescription they usually go on to buy the eyewear they need to correct their vision. This is one reason why opticians have remained fairly insulated from competition from generalist retailers and online sellers, and up until recently the main battleground for market share has been among the opticians chains and independents. But are people prepared to check their own vision, perhaps with an app? Do they value the health checks that an eye examination includes?

In a climate where the grocery superstores are keen to add any services they can in order to generate non-food sales, we are seeing expansion of in-store opticians. The grocers have already made significant inroads into pharmacy, a similar sector, and opticians are a logical next step. The in-store opticians employ qualified staff in just the same way that a conventional optician must and can deliver similar levels of care and similar ranges, but often at extremely low prices. The big issue for conventional opticians is competing, as high street shops are loaded with many more operating costs including rent and rates. While an in-store optical outlet only needs to make a contribution to cover its use of space, a standalone high street shop is much costlier to run. So competition is intensifying as Tesco (run by Galaxy), Asda and Sainsbury's (via an arrangement with Mee) add to their in-store opticians chains.

This report takes a look at optical goods and sunglasses. It examines consumer spending, looks at what consumers are buying and where they are buying it. It examines the demographic profile of people who are buying from supermarkets or online and also looks at the factors that influence their decisions about where to buy.

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