OMO Optical Monitor 2025
11° edition

MIDO Milan, 9th February 2025

DANIELE NOVELLO Strategic Analytics & Insights Manager

NielsenIQ GfK

Background and Objectives

Objective

The focus of the study lies on understanding **consumers' information and shopping behavior** and identifying the **latest trends** in the optics market

Interest groups

In particular, the study should offer insights for the different stakeholders of the MIDO and SILMO

- Manufacturers of optical products
- Opticians and other retailers of optical products
- Fashionistas
- Designers
- Journalists

Methodological approach

Quantitative field in December 2024
Online Interviews
representative survey of
4,000 consumers in **4 countries**

France Italy Germany US

Trend

Trend compartison vs last edition 2019

For some KPI's a comparison with 2022 is present for FR IT GE

BACKGROUND

Consumer Trends and Attitudes

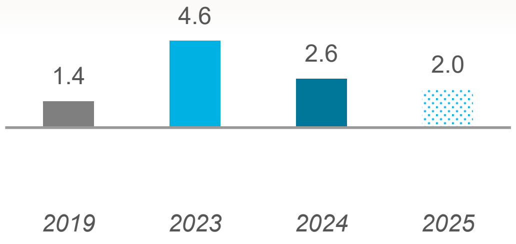
Source: IMF, NIQ GfK Consumer Life

NielsenIQ GfK

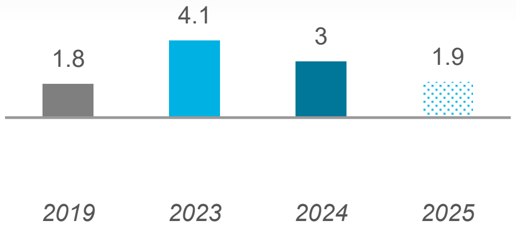
Inflation has eased its grip…

Sources: IMF, World Economic Outlook Update, October 2024 (2024 estimates, 2025 projection)

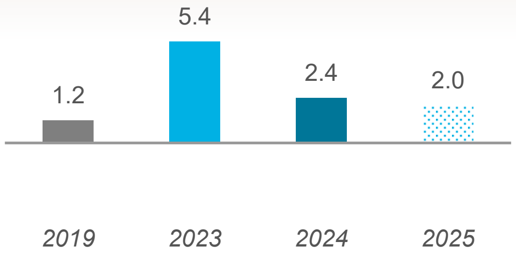
Advanced Economies
consumer prices
annual % change



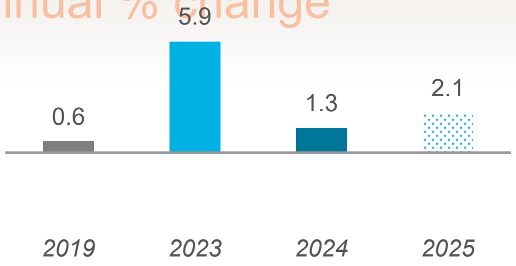
USA
consumer prices
annual % change



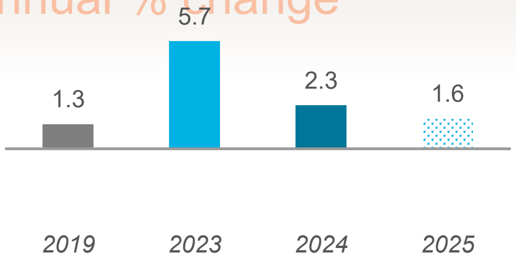
AREA €
consumer prices
annual % change



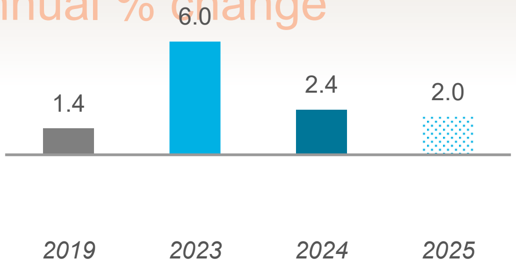
Italy
consumer prices
annual % change



France
consumer prices
annual % change



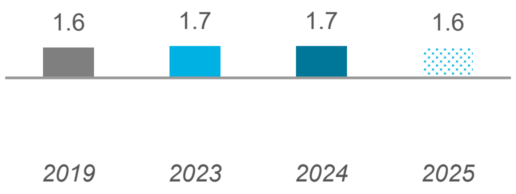
Germany
consumer prices
annual % change



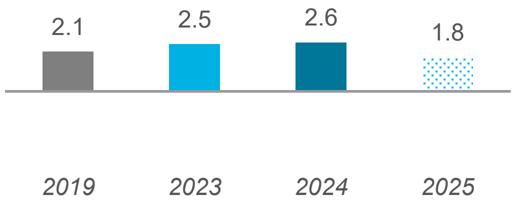
Consumer expenditures are struggling, Europe is stuck in a rut

Sources: IMF, World Economic Outlook Update, October 2024 (2024 estimates, 2025 projection)

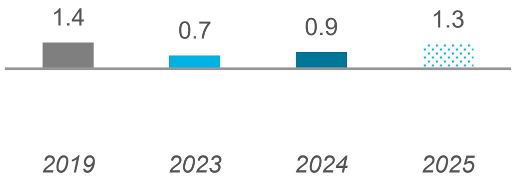
Advanced Economies
private consumer expenditure
annual % change



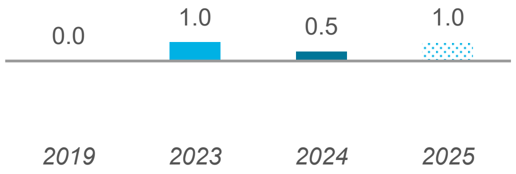
USA
private consumer expenditure
annual % change



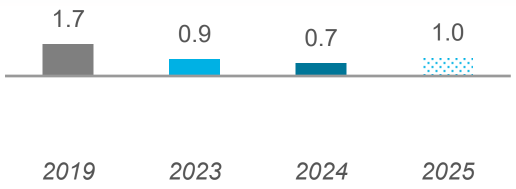
AREA €
private consumer expenditure
annual % change



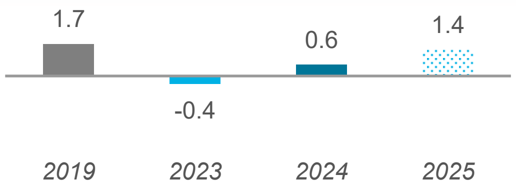
Italy
private consumer expenditure
annual % change



France
private consumer expenditure
annual % change

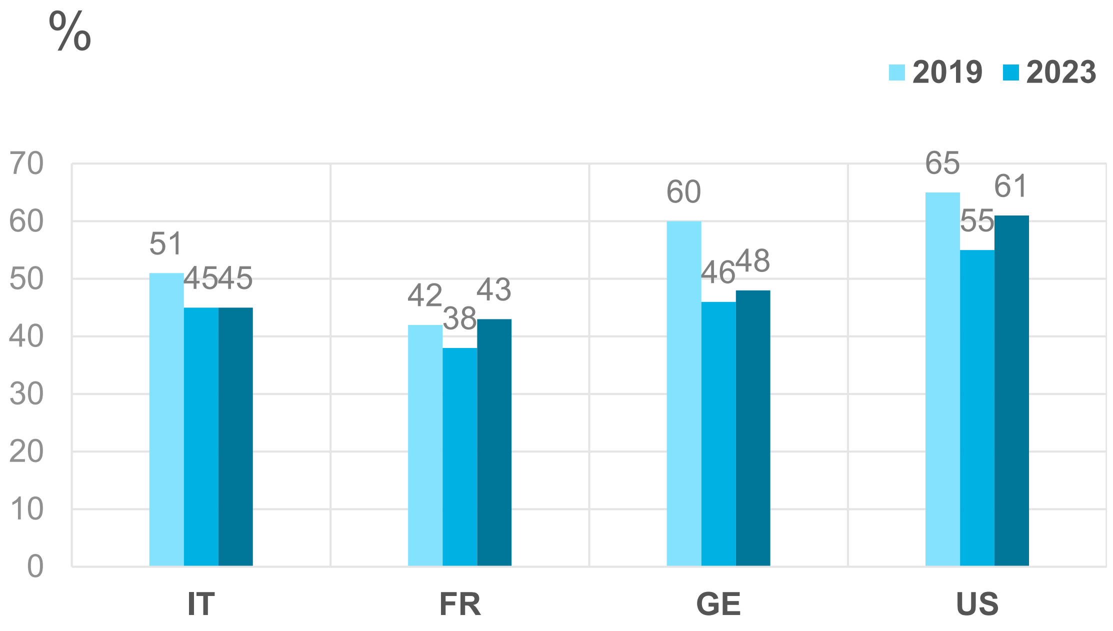


Germany
private consumer expenditure
annual % change



Consumer Confidence is slightly increasing, but still low (in particular in Europe)

I am confident in my own economic future



NIQ GfK Consumer Life 2024, 2019: average figures IT FR GE USA

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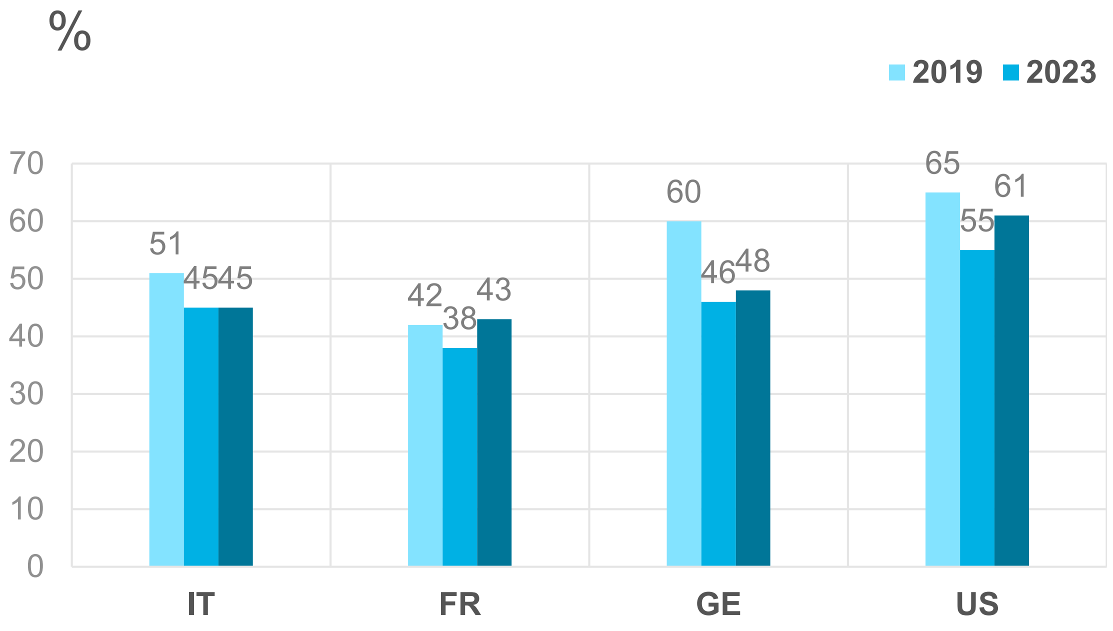


NIQ GfK Consumer Life 2024, 2019, average figures IT FR GE USA

"I WISH …"

clashes against

"I NEED…"

«Always on look out for new products and services»

%fully agree

23%

(-8% vs ‘20)

Less open to innovation and exploration

«I am always looking for novelty and fun, even in everyday products»

%fully agree

21%

(-5% vs ‘20)

NIQ GfK Consumer Life 2024, 2019: average figures IT FR GE USA

EYEWEAR latest product trends

importance when purchasing eyewear

% very important

31% *(-16% vs '19)*

32% *(-13% vs '19)*

Source NIQ GfK, OMO Optical Monitor 2025;
Figures Aggregate IT FR GE USA

Key Trends
Source NIQ GfK Consumer Life

FIGURES FOR IT FR GE USA AGGREGATED

	2024	Up/Down vs last year
Eco Conscience	#1	Stable
Experience Above All	**2**	+4
All About me	3	-1
In the Know	**4**	**+4**
Discerning Consumption	5	-1
Seeking Safety	6	-1
Sense of Wellbeing	7	Stable
Frictionless Living	8	-5
Belonging	9	Stable

IN THE KNOW

#1 For me the most important thing about a brand is that it offers good value for money

2	If I'm not satisfied with a product or service I will choose an alternative
3	Brands and companies have to be environmentally responsible these days
4	Price is the most important factor in my purchasing decisions
5	I am always looking for ways to simplify my life
6	I like to buy products that can be tailored to my needs
7	It is important to indulge or pamper myself on a regular basis
8	The look, feel and smell of a product is very important to me
9	I always read the label before I buy any product
10	I spend quite a lot of time researching brands before making a major purchase
11	I prefer to own fewer but higher quality items (clothes, technology products, etc.)
12	I actively look for products and services that help me live a healthy lifestyle
13	I feel guilty when I do something that is not environmentally friendly
14	My outward appearance reflects my inner well-being
15	I only buy products or services from a trusted brand
16	I only buy products and services that appeal to my beliefs, values or ideals
17	Where and how a product is made is very important to me
18	Having less choice makes it easier for me to make a purchase decision
19	My individuality is reflected in how I look and what I buy
20	I am prepared to pay more for products that make my life easier
21	I worry about getting sick from contaminated food or drink products
22	I really need the shops and services I use to be available at all times
23	I'm always on the lookout for new products and services
24	I am interested in other people's opinions about what products and services to buy
25	I will select one brand over another specifically because it supports a cause I believe in
26	I go out of my way to tell other people about products and services I really like
27	I am always looking for novelty and fun, even in everyday products
28	I often feel overwhelmed with information when I am making a large purchase
29	I go out of my way to make sacrifices for the good of the planet
30	I'm willing to settle for an inferior product or service if it's available when I need it

ranking based on % of fully agree

NIQ GfK Consumer Life 2024, list of #30 attitudes vs shopping/brands

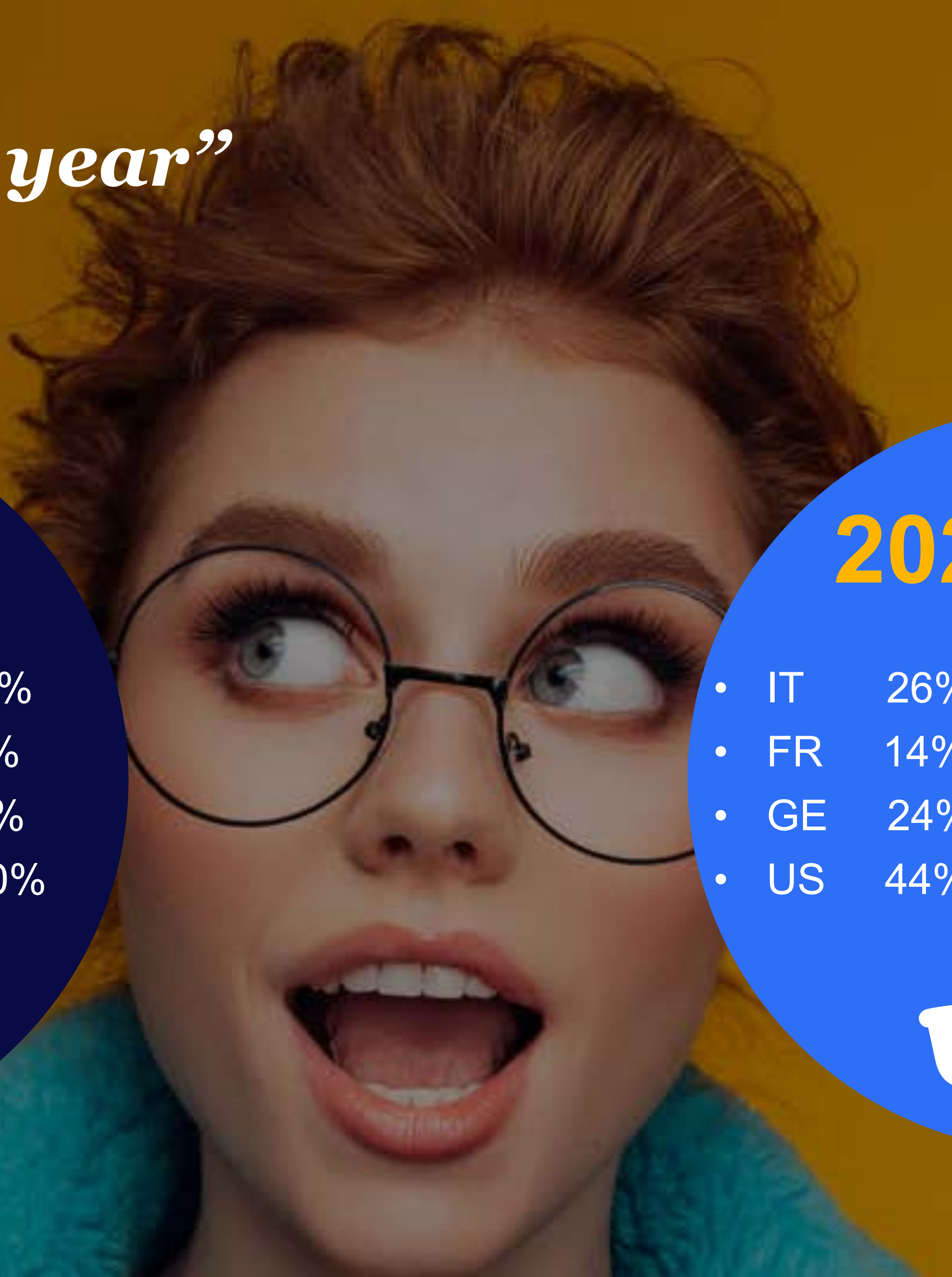
Value For Money is the Keyword!

Eyewear Purchase Journey

Source: IMF, NIQ GfK Consumer Life

NielsenIQ GfK

"I purchase each year"

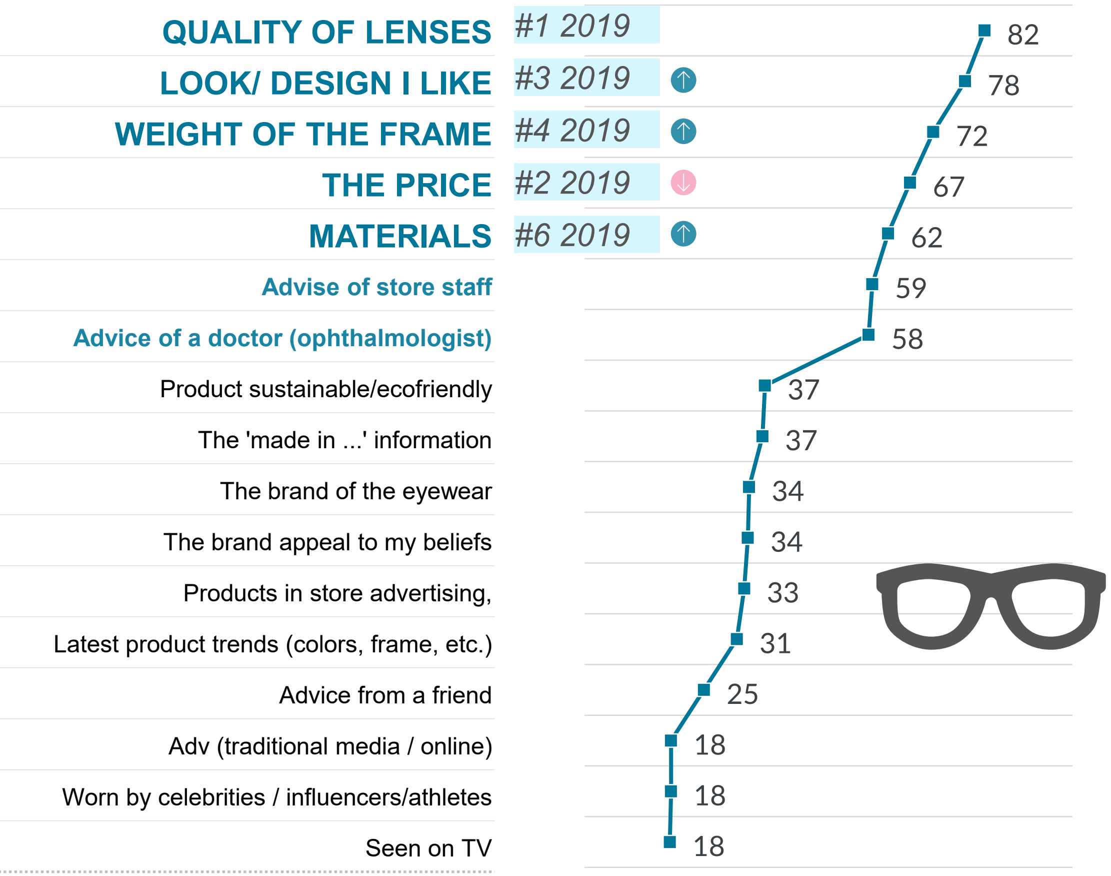


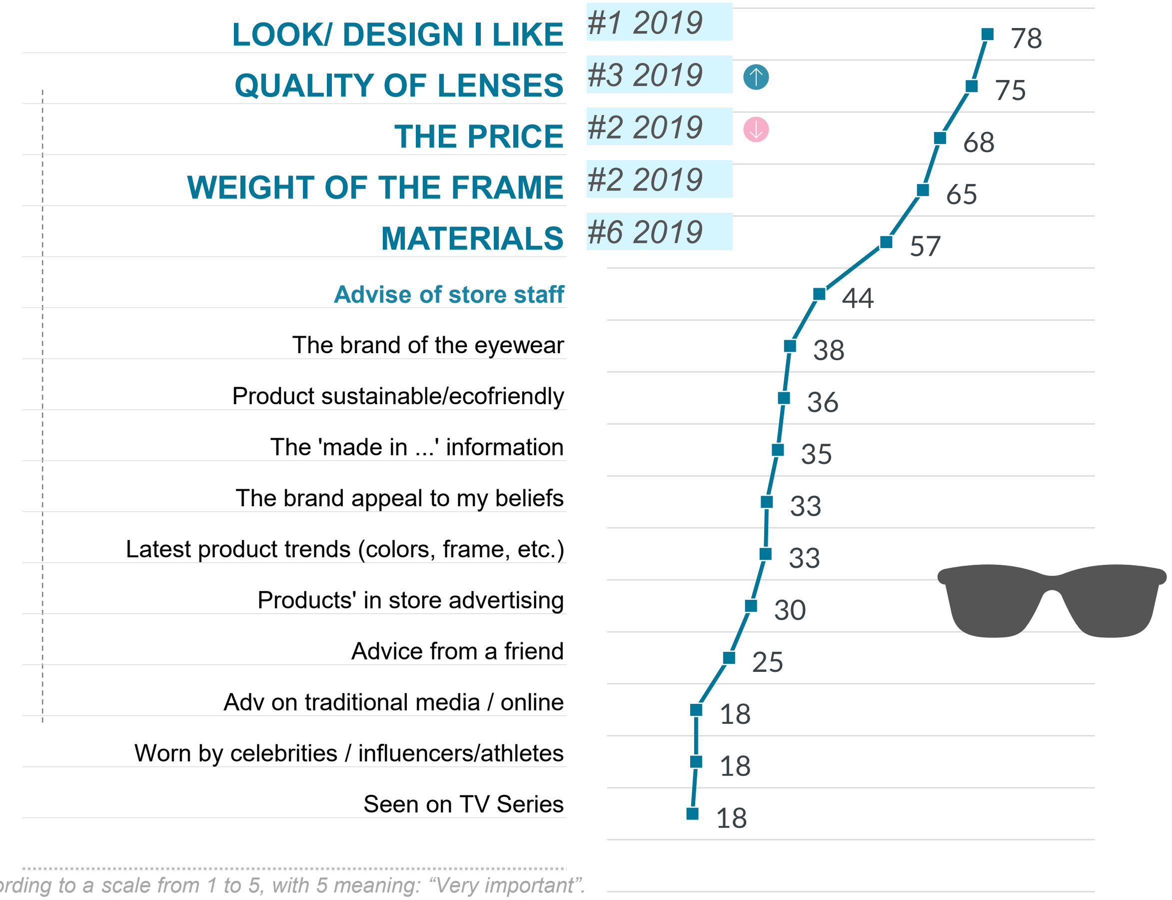
	2025	2019
IT	20% ↑	11%
FR	11% ↑	5%
GE	14% ↑	3%
US	44% ↑	20%

	2025	2019
IT	26% ↑	23%
FR	14% ↓	20%
GE	24% ↑	22%
US	44% ↑	41%

Purchase drivers

aggregate figures IT FR GE US - % top 2





E04: To what extent is each aspect important to you, when you shop for Optical glasses/sunglasses? Please rate according to a scale from 1 to 5, with 5 meaning: "Very important".
D04: To what extent is each aspect important to you, when you shop for Sunglasses? Please rate according to a scale from 1 to 5, with 5 meaning: "Very important".

Touchpoints for infojourney
values in %

RETAIL/SHOPS	64%	52%
DIGITAL	56%	66%
TRADITIONAL MEDIA	29%	38%
OTHER	28%	24%

DIGITAL	70%	78%
RETAIL/SHOPS	53%	41%
TRADITIONAL	26%	34%
OTHER	23%	24%

IN STORE (sales staff, product in store, windows,…) confirm its releance …
.. DIGITAL TOUCHPOINTS are gaining relevance and result the main channel for sunglasses

RETAIL/SHOPS	63%	58%
DIGITAL	49%	54%
TRADITIONAL MEDIA	23%	28%
OTHER	21%	19%

RETAIL/SHOPS	60%	55%
DIGITAL	57%	61%
TRADITIONAL MEDIA	25%	28%
OTHER	24%	21%

E02 : How did you collect information before the purchase? Base have collected information before purchase
D02 : How did you collect information before the purchase? Base have collected information before purchase

Infojourney is going Digital!

2025	2019
Aggregate 58%	39% (+19)
• US 70%	• 42% (+28)
• IT 56%	• 53% (+3)
• GE 57%	• 34% (+23)
• FR 49%	• 26% (+23)

2025	2019
Aggregate 65%	49% (+16)
• US 78%	• 49 (+19)
• IT 66%	• 62% (+4)
• GE 61%	• 46% (+15)
• FR 54%	• 37% (+17)

16-35yrs **69%** 46-55yrs **63%**
36-45yrs **70%** >55yrs **52%**

16-35yrs **65%** 46-55yrs **53%**
36-45yrs **61%** >55yrs **49%**

...who?

	#1	#2	#3
	actor	singer	influencer
	influencer	actor	sport champion
	influencer	actor	singer
	actor	influencer	singer

Influencers on eyewear

16%

Have recently seen a celebrity wearing "my" model…

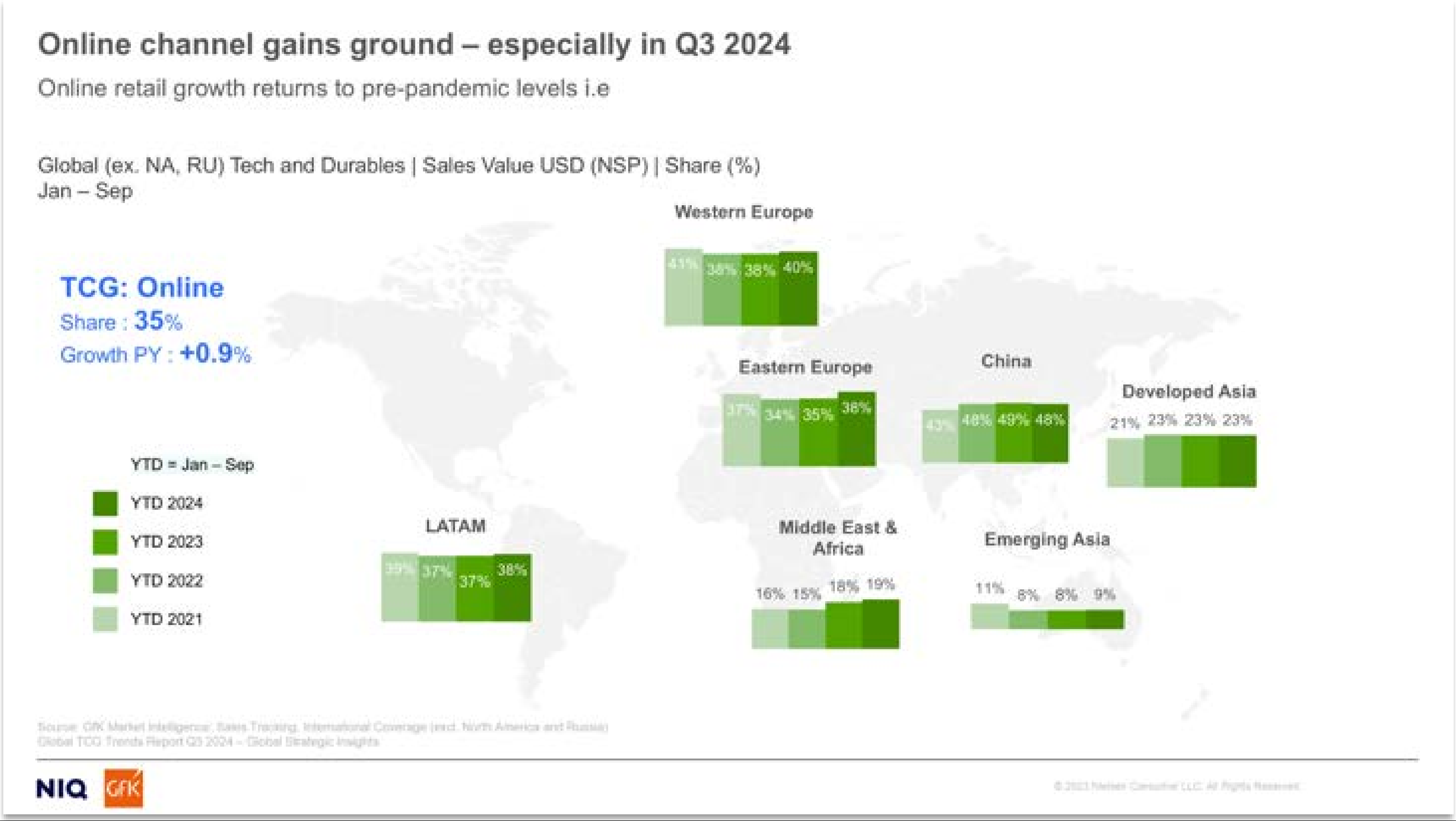
Last mile is still in Store!

EYEWEAR E-SHOPPERS

	OPTICAL 2025	OPTICAL 2019	SUNGLASSES 2025	SUNGLASSES 2019
ITALY	6%	8%	11%	13%
FRANCE	4%	1%	7%	10%
GERMANY	11%	11%	17%	19%
US	16%	17%	22%	14%

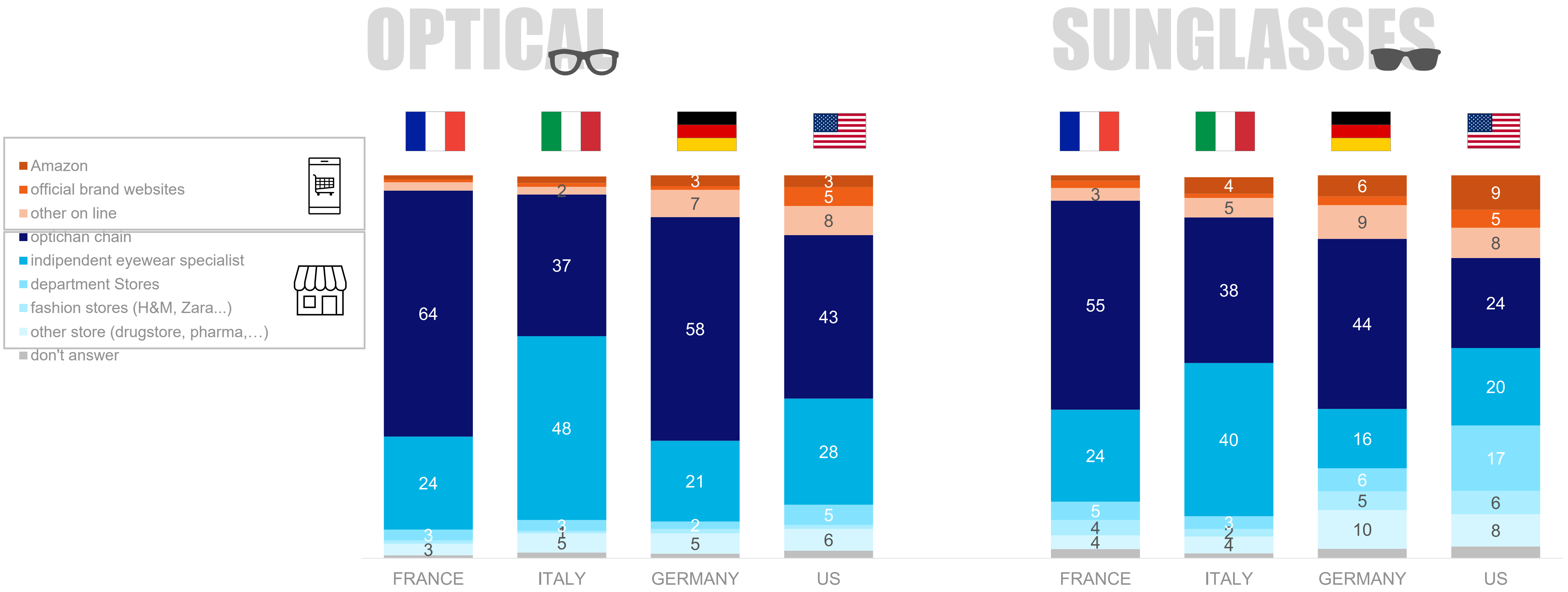
FIGURES OF E-SHOPPING IN TECH MARKETS

SOURCE: POS NIQ GfK DATA



Purchase channel: general overview

Products purchased in %



B02/C02: And where in particular did you purchase the latest SUNGLASSES/OPTICAL GLASSES?

NIQ GfK

REASON FOR PURCHASING ON LINE

Figures Aggregate IT FR GE USA; trend vs 2022 E-COMMERCE EYEWEAR GfK for MIDO 2022

CHEAPER PRICE	51%	TREND VS 2022: IT +1; FR +6; GERMANY stable
EASY DELIVERY AT HOME ↓	43%	TREND VS 2022: IT -10; FR -15; GERMANY -10
ONLINE DISCOUNT ↓	34%	TREND VS 2022: IT -6; FR -1; GERMANY -8
COMFORTABLE SHOPPING /LESS STRESS ↓	33%	TREND VS 2022: IT stable; FR -6; GERMANY -10

ON LINE IS FLATTENING ITS "*REASON WHY*" ON LOW PRICES

Market Opportunities

EYEWEAR LANDSCAPE
SUMMARY OF COUNTRIES

OPTICAL

PAIR OWNED
- IT 1,4
- FR 1,4
- GE 1,6
- US 1,5

PURCHASE EACH
- IT 3,0 years
- FR 2,9
- GE 3,1
- US 2,2

PRICE PAID €/$
- IT 159
- FR 150
- GE 159
- US 128

SUNGLASSES

PAIR OWNED
- IT 1,9
- FR 1,6
- GE 1,8
- US 2,0

PURCHASE EACH
- IT 2,7 years
- FR 3,0
- GE 2,8
- US 2,1

PRICE PAID €/$
- IT 134
- FR 112
- GE 112
- US 89

I CARE A LOT ABOUT MY IMAGE / APPEARENCE
- IT 62%
- FR 48%
- GE 49%
- US 57%

MARKET OPPORTUNITIES
Italy

Consumers trends

I am confident in my own economic future

-6% (vs 2019)

buy new things to wear each season

47% (+7pp vs tot)

Eyewear makes me feel good looking

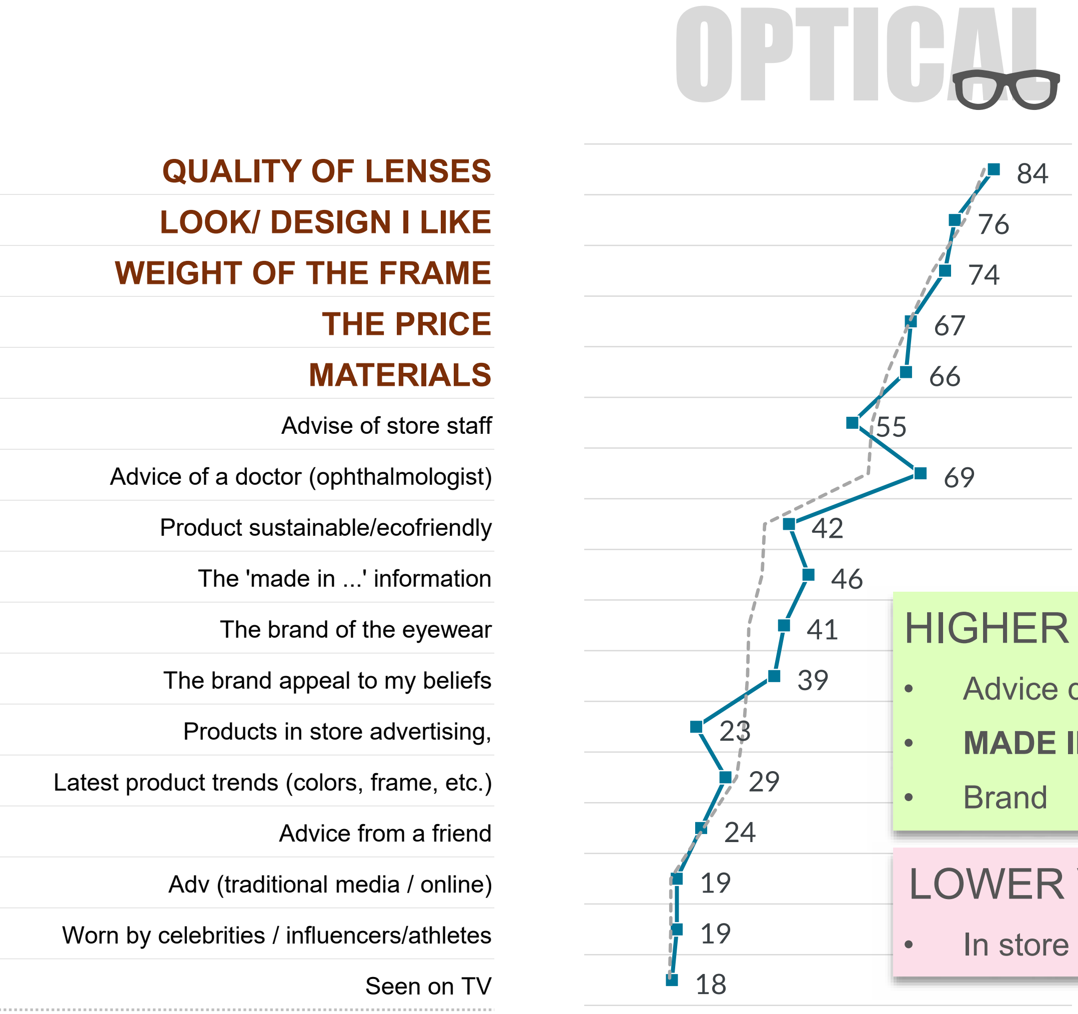
55%

(+8pp vs tot)

Decreasing vs 2019

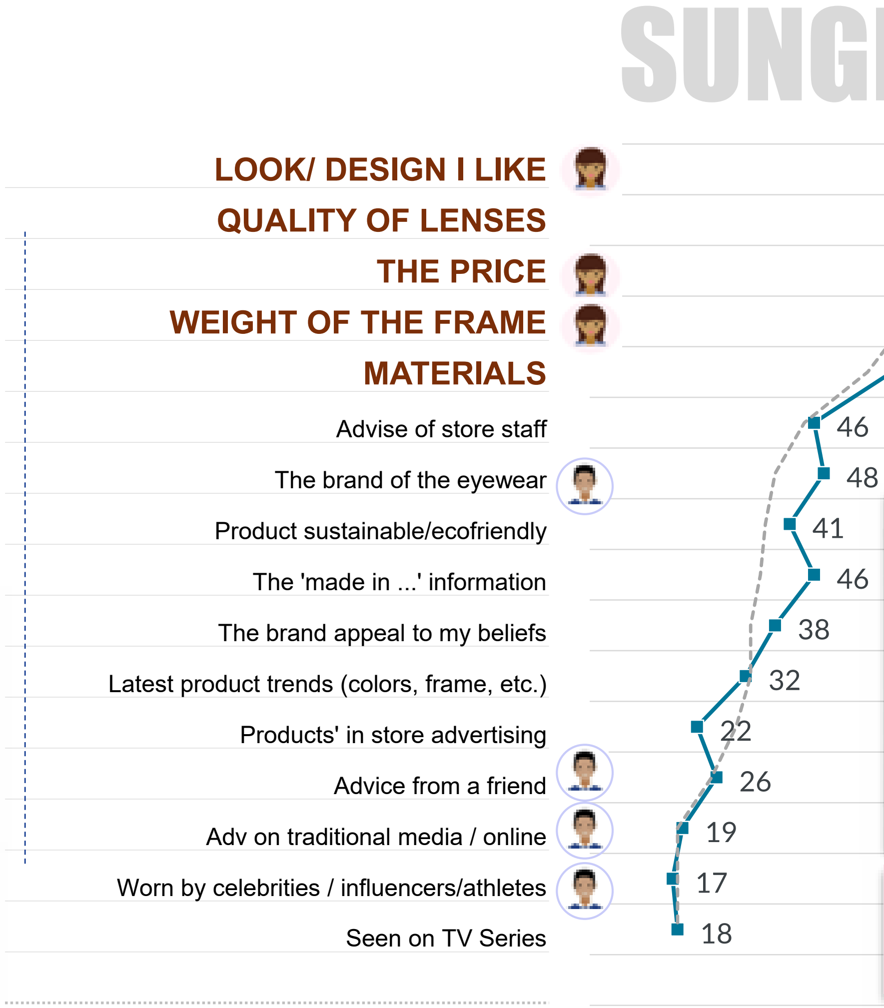
Purchase drivers

% top 2



HIGHER VS TOT
- Advice doctor
- **MADE IN**
- Brand

LOWER VS TOT
- In store adv



HIGHER VS TOT
- Quality lenses
- Weight
- **MADE IN**
- Brand
- (Price)

LOWER VS TOT
- In store adv

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Design Trends
+ cat eyes
- rounded
- aviator
+ full frames
- rimless
+ mixed
- metal
- plastic

MARKET OPPORTUNITIES

France

Consumers trends

All about me

#1/9 (#3 tot)

Source: NIQ GfK Consumer Life

Sustainability doesn't increase the appeal of the brand

43%

(+7pp vs tot)

Important to indulge on a regular basis

51%

(+16pp vs tot)

Source: NIQ GfK Consumer Life

The look and feel of the product is very important

+5% vs tot

Source: NIQ GfK Consumer Life

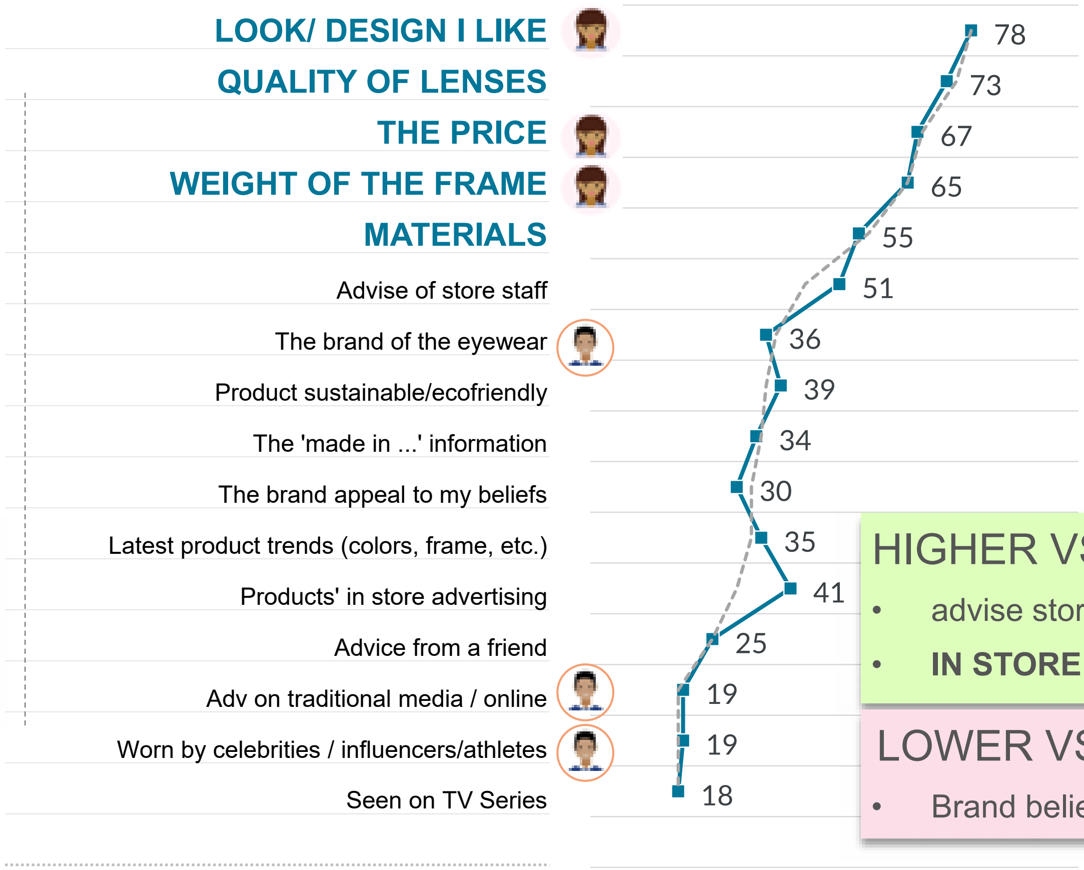
Purchase drivers
% top 2

OPTICAL

HIGHER VS TOT
- advise store staff
- **IN STORE ADV**

LOWER VS TOT
- Brand beliefs

SUNGLASSES



HIGHER VS TOT
- advise store staff
- **IN STORE ADV**

LOWER VS TOT
- Brand beliefs

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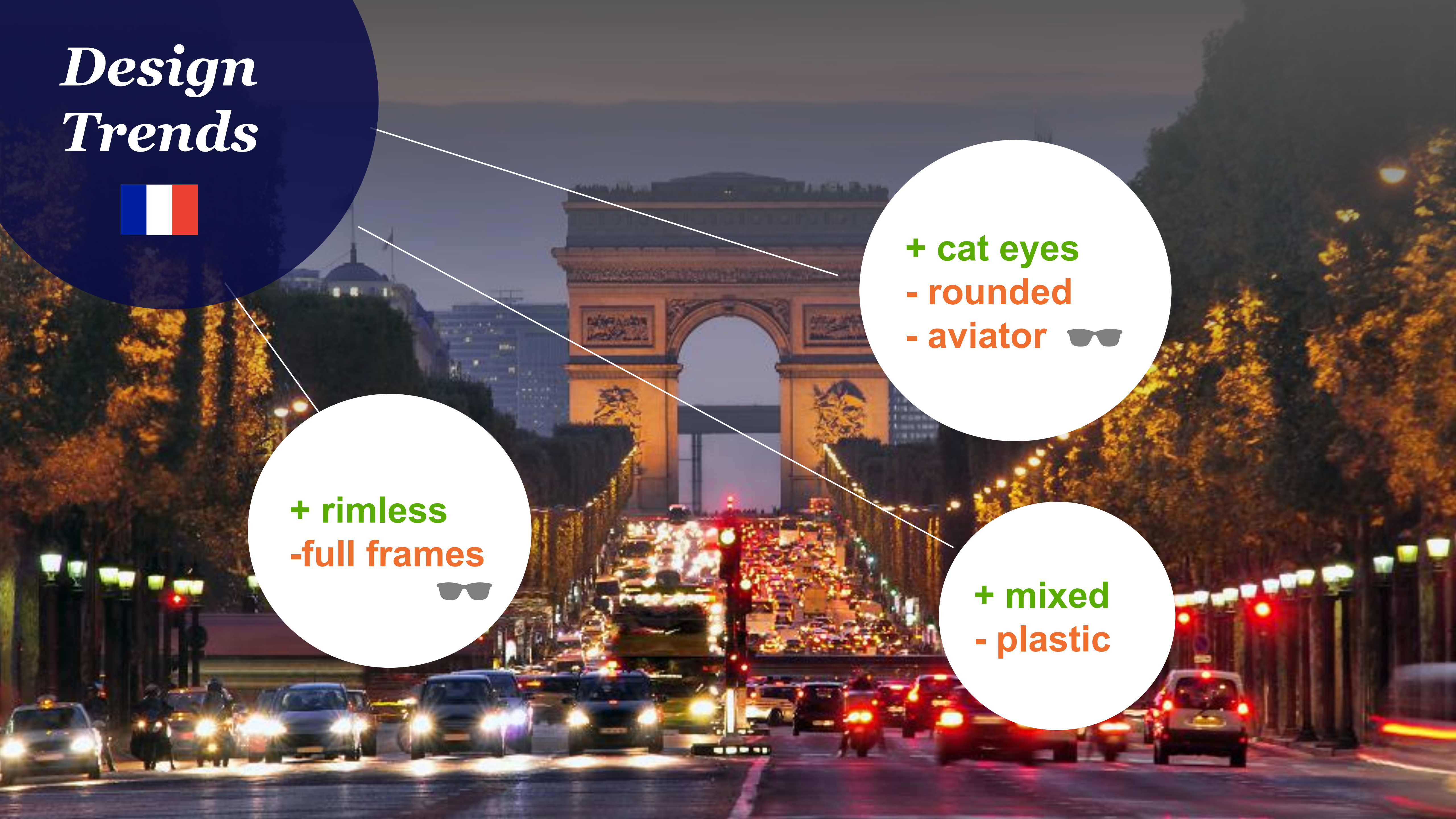
Design Trends
+ cat eyes
- rounded
- aviator
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-full frames
+ mixed
- plastic

MARKET OPPORTUNITIES

Germany

Consumers trends

Go out of my way to make sacrifices for the planet

#24/44 items

(#18 tot)

Source: NIQ GfK Consumer Life

Prepared to pay more for sustainable eyewear brand

#3/11 items

(#5 tot)

I love shopping

49%

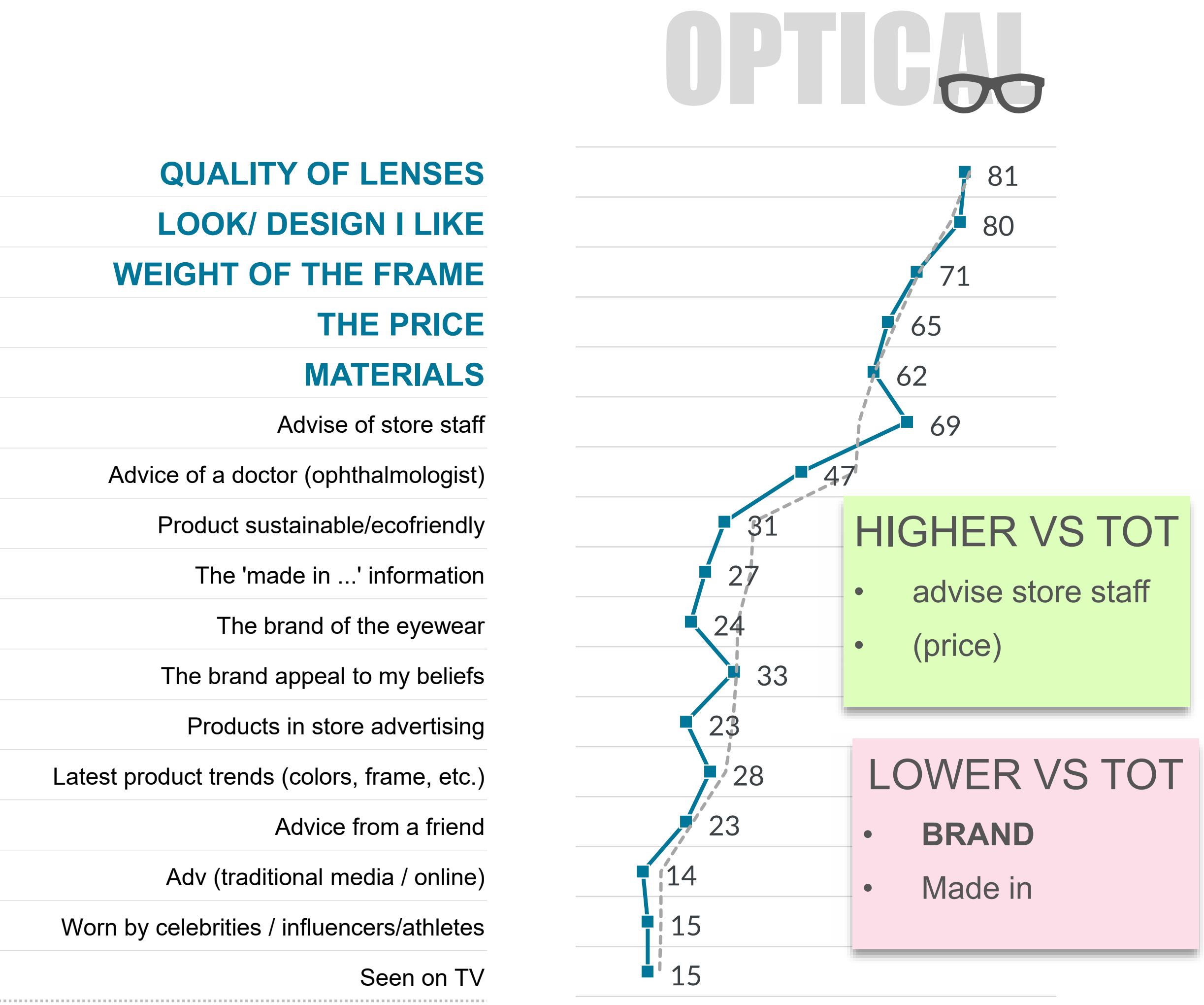
(-5pp vs tot)

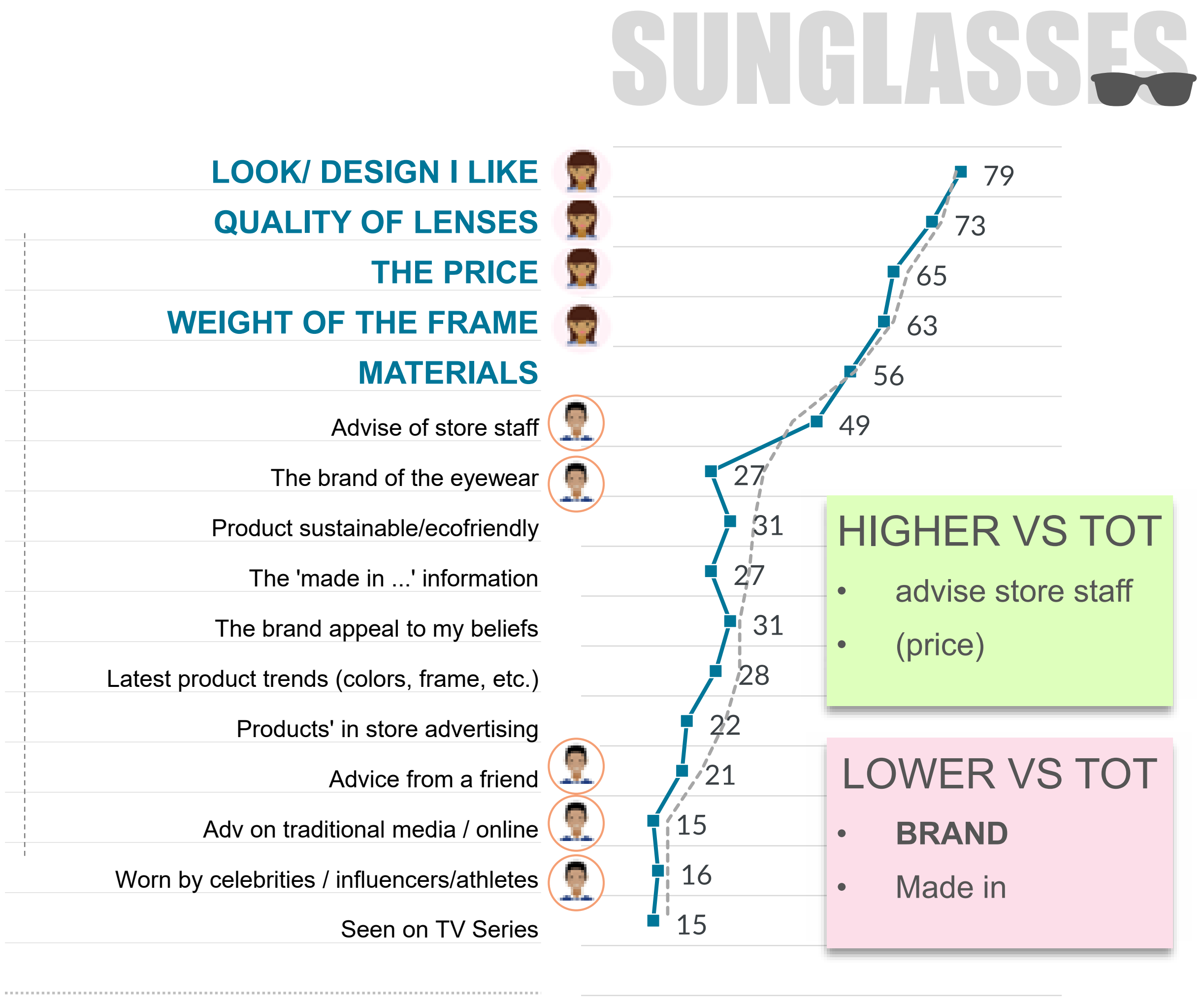
It tooks one day to decide which sunglasses to buy

40%

(+10pp vs tot)

Purchase drivers
% top 2





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Design
Trends
+ cat eyes
- squared
- aviator
- full frames
+ rimless
+ half frames
+ mixed
- metal
- plastic

MARKET OPPORTUNITIES

USA

Consumers trends

easy delivery at home as a driver for e-shopping

52%

(+13pp vs tot)

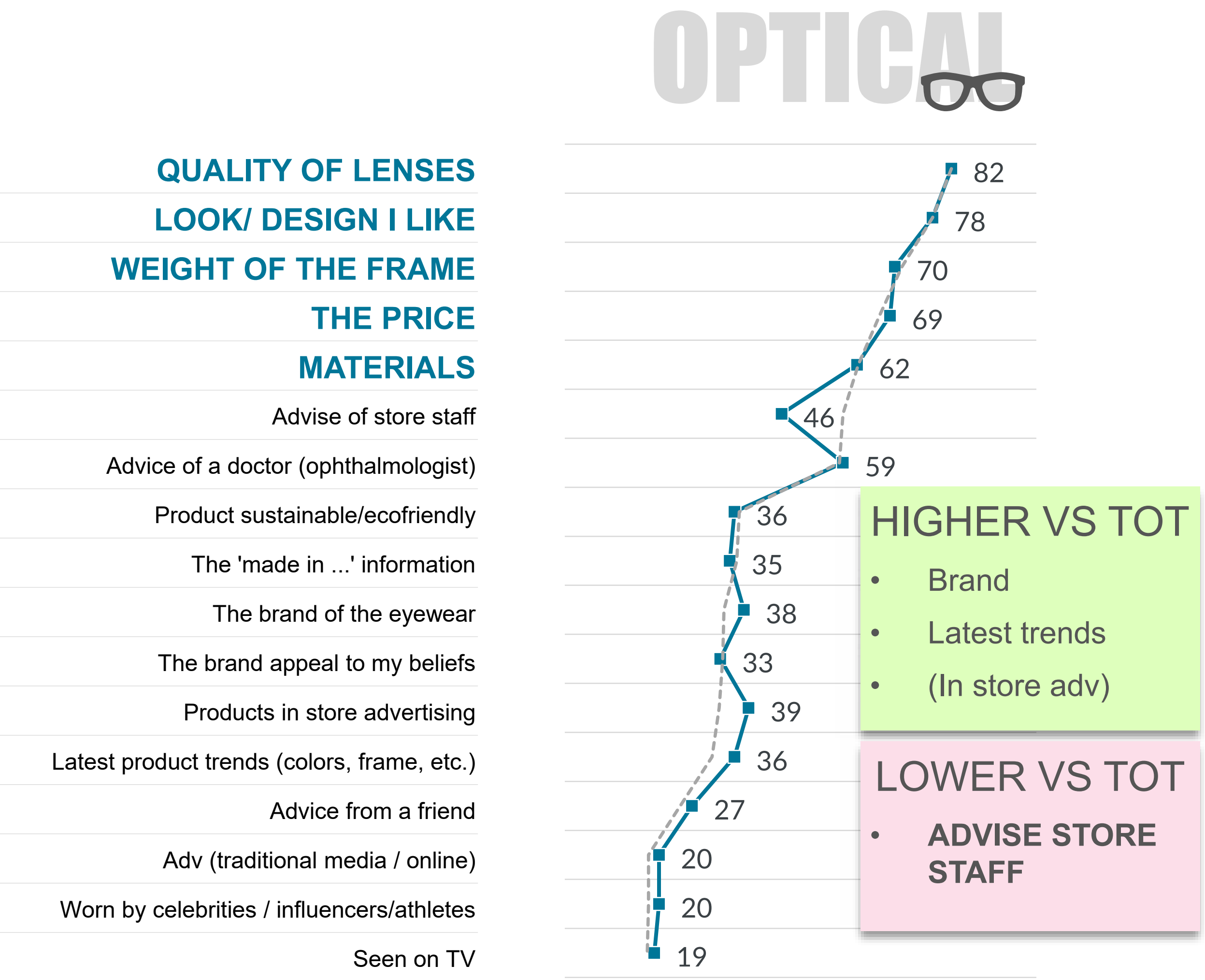
Wearing eyewear help my self confidence

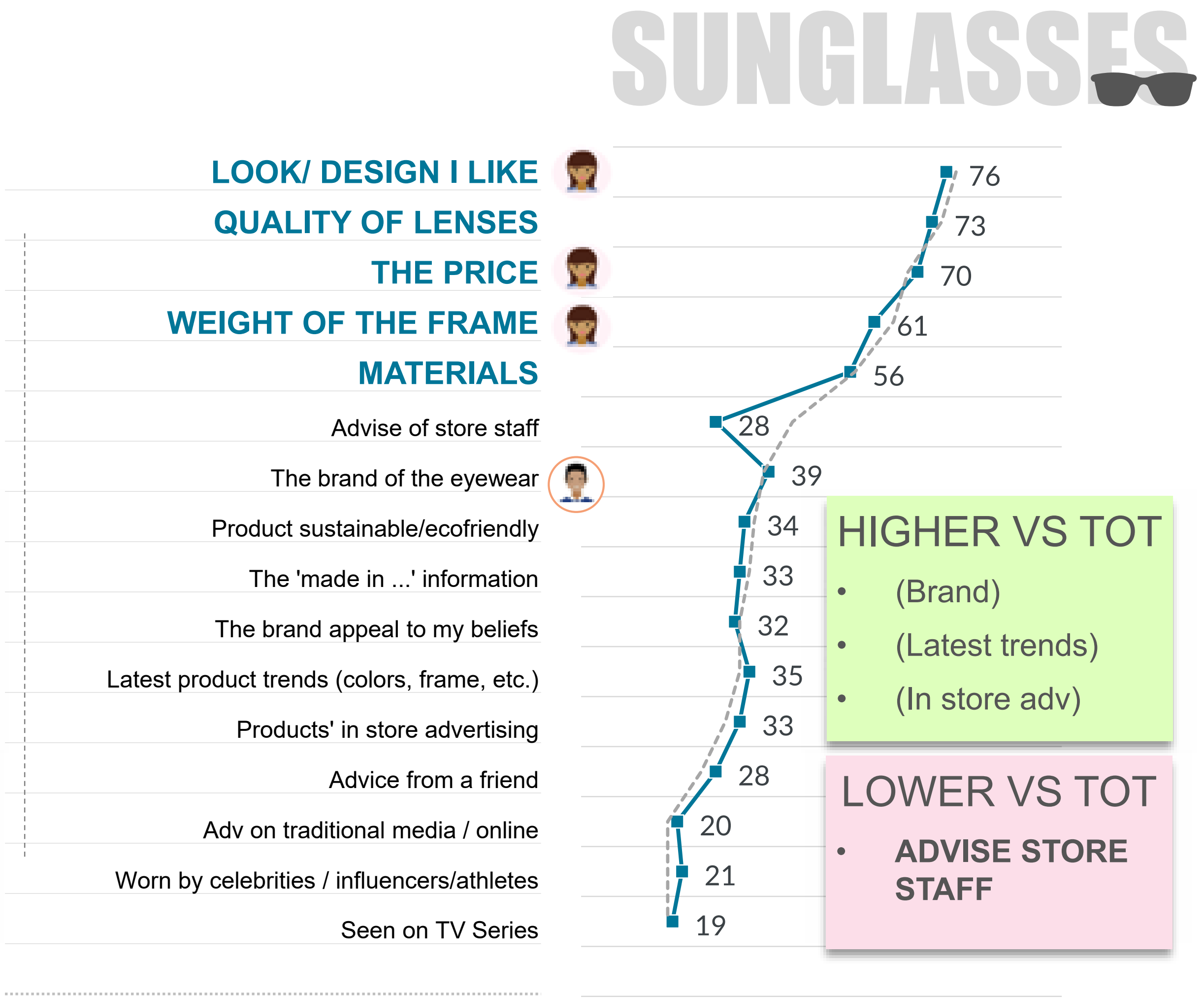
46%

(+9pp vs tot)

Pay more attention to ADV

Purchase drivers
% top 2





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Design Trends
+ squared
+ cat eyes
- rounded
- full frames
+ rimless
+ mixed
- metal
- plastic

A look at *FUTURE* intentions

NielsenIQ GfK

INTENTION TO PURCHASE NEXT MONTHS % top2

SUNGLASSES

- IT 63%
- FR 55%
- GE 60%
- US 71%

OPTICAL

- IT 61%
- FR 57%
- GE 56%
- US 72%

Future VS Present

IC=100 when future=present

>100 when expected growth <100 when expected decrease)

SUNGLASSES

E-SHOPPING

- IT 108
- FR 131
- GE 113
- US 97

MATERIAL MIXED

- IT 164
- FR 171
- GE 168
- US 149

OPTICAL

E-SHOPPING

- IT 204
- FR 195
- GE 129
- US 111

MATERIAL MIXED

- IT 153
- FR 155
- GE 152
- US 142

Summary

CHALLENGING SCENARIO…

General economic context is still challenging:

- *consumers are putting **desires on hold**…*
- *… ending up buying more often **what they need, than what they want***

SENTIMENT

…EYEWEAR STILL ON TRACK…

Eyewear market ecosystem proves to meet consumers expectations:

- *despite being pragmatic, **consumers are adressing quality, performance and look… more than price***
- *at the heart of brand promise: **value for money***

RESILIENCE

…NEW «SILICON-CARBON» JOURNEY…

Purchase journeys are changing;

- ***digital** infojourneys are increasingly **preparing for the last mile in store***
- ***new tools/best practices are required** for stores and store-staff*

LAST MILE IN-STORE

…A PROMISING OUTLOOK

We are approaching -an uncertain- future leveraging on:

- *a large majority of eyewear lovers planning to purchase (further)*
- *…sunglasses (63%)*
- *…optical glasses (61%)*

BUILDING BLOCKS

CALL TO ACTIONS FOR BRANDS

✓ ***READ CONSUMERS' LEAPS** Brands must confirm their capabilities of meeting clients expectations: providing quality, convenience and value for money & understanding targets and markets peculiarities*

✓ ***HELPING CONSUMERS VS «SAD PASSIONS»** Brands must further help consumers bridging the gap desires-lifestyles vs needs-purchases*

BE THE ENZYME!

Thank you