A Study on Perception of Branded & Local Spectacles in Nagpur

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INTRODUCTION

Generally used for eye care, spectacles are nowadays considered as personality enhancers and a fashion accessory. As a matter of fact, there is wide range of spectacles available now a days and enough variety exists even in case of power spectacles. Increased use of laptops, computers and mobiles has led to increase in number of people, specially students and working class who are using power spectacles.

Demand for spectacles in India is driven by demographics, fashion, and changing healthcare practices. Indian market has witnessed a surge in demand for spectacles owing to the following factors like rising per-capita income, growing awareness amid consumers, eyewear becoming more of a fashion accessory and a lifestyle product, Long working hours, ever changing consumer preferences, wide choice availability as per suitable price range and adverse effects of online net/mobile surfing and video gaming on eyesight.

Almost all leading international players like Bausch & Lomb, Johnson & Johnson, Luxottica, Essilor, Carl Zeiss, etc. have a strong presence in the Indian market through own subsidiaries, joint ventures and marketing tie-ups. Flourishing mall culture in India has enabled these brands to effectively mark their presence in tier-2 and tier-3 cities of India.

Several indigenous companies like GKB Rx Lens Pvt. Ltd., Titan Industries, and Auro Lab etc. have also emerged as strong players in the Indian market in the recent Years. Many of these companies have collaborations with global leaders in the optical industry and have set up state-of-art manufacturing facilities to not only cater to the domestic market but also to export.

There is a section of the market where customer is highly price centric. This phenomenon has led to the emergence of unbranded spectacles. As a matter of fact, there is a huge parallel market in unbranded eyewear in India. Market for unbranded eyewear has flourished in India mainly due to its price effectiveness. Both branded and unbranded segment has its own set of advantages and weaknesses. But it is true that market exists for both the categories.

India is globally viewed as a strong market with huge potential for consumer goods. Further, more than half of India’s population is below the age of 35. This assumes significant importance as lion’s share of income is derived by eyewear industry from this segment. Moreover, market for eyewear is growing at a swift rate due to various reasons mentioned above.

Under such backdrop, the present study is undertaken to know the perception of people of Nagpur in respect of Branded and Unbranded eyewear. Nagpur has an approximate population of around 3 million as per 2011 census and is third largest city in the state of Maharashtra. It is 13th largest urban centre of India and is an important economical centre of the country. This highlights availability of substantial economic opportunity for eyewear industry in the city. Moreover, Nagpur is an important education hub and a growing economic centre that sees influx of students, workers etc. from other parts of the country creating significant market base for eyewear industry.

In this context, our study aims to ascertain the choice pattern of citizens of Nagpur for selection of eyewear between branded and unbranded. Study also intends to identify the factors influencing the decision making to select either a branded or unbranded eyewear. An attempt is made to understand the degree of influence of each factor on selection of a particular eyewear.

RATIONALE OF THE STUDY

The spectacles market is extremely fragmented, complex, price sensitive, diverse and distribution driven. Most consumers are ignorant about quality, brands, country of origin of products.
etc., and are largely guided by the opticians and of course the price. Hence, it is very important to educate and train the trade. According to eye specialists almost 20-30% of the Indian population, i.e. 200 to 300 million people, requires visual correction. However, only a fraction these people are presently using proper optical products due to lack of awareness as well as affordability issues. Further, branded eyewear has very limited penetration in the Indian market at present, but it is on an increase now.

This study aims to draw a comparison between branded & local spectacles with respect to various parameters. It is a general perception that branded segment attracts attention of mostly affluent consumers whereas unbranded eyewear catches attention of masses. With opening of more and more malls and shopping centers in Nagpur city, branded spectacles are suddenly more accessible than before. As a result branded segment of eyewear is fast catching the attention of the masses and local populace. The segment, however, faces tough competition from unbranded eyewear segment which is omnipresent and enjoys substantial benefit due to its effective pricing. Branded eyewear too has its own benefits in the form of better product offering and goodwill. Medical fraternity too is in favor of branded products as it is of a view that unbranded and imitated eyewear can have negative impacts of eye and skin of a person wearing it.

Due to these factors there is a likely shift from unbranded to branded products. In this backdrop, study is undertaken encompassing a survey asking questions from people of Nagpur using eyewear for their day to day usage. Study will be beneficial for both branded and unbranded sector of eyewear industry as it will help them understand the perception of people on eyewear and thus help make suitable changes to their products marketing plans.

OBJECTIVES OF THE STUDY

1. To know the preference of customers for various parameters of selecting an eyewear.
2. To find the perception of customers on significant parameters with reference to branded and local spectacles.

RESEARCH METHODOLOGY

Sample frame: Nagpur city
Sample size: 350
Survey description and respondent profile:

The survey is conducted among different age groups wearing spectacles for the past few years. Under Occupation as a criterion, respondents in public service, private jobs, businessmen and students are considered, so as to arrive at meaningful conclusions.

Responses were classified, analyzed and interpreted based on the respondent profile. The selected criteria defining the respondent profile are gender, income, educational qualifications, age, marital status and occupation. Questions pertained to factors affecting choice of spectacles and preference level of individuals for branded and local spectacles. Data Analysis and Interpretation was done on the basis of responses which were ‘Most Agreed’.

LIMITATIONS

- Perception / Opinion of the respondent may not be based on his/ her own experience, but may be influenced by external factors like media and opinion of other people.
- Some respondents were reluctant in answering certain questions.
- The study is limited to the Nagpur city.
- Respondents may not have provided accurate & honest answers due to various reasons like boredom, lack of time and memory issues, etc.
- Oral feedback given by the respondents could not be compiled in the report.
DATA ANALYSIS AND INTERPRETATION

1. Responses under various age groups:

**Figure 1**

AGE GROUP-WISE RATING ON MOST IMPORTANT FACTOR

**20-30 years:** Above figure shows that highest respondents i.e. 15% have rated comfort level as the most important factor in buying a spectacle. Quality of glass is the second most important factor with 14% respondents in its favor, closely followed by other factors like frame material & guarantee at 13%, 12% and 12% respectively. Least important factor is online availability of products as only 6% respondents have replied in its favor.

**30-40 years:** The figure shows that again comfort level has been given the highest rating at 17% by this age group, closely followed by glass quality at 15%. Again, least important factor is online availability as only 4% respondents have replied in its favor. Response for remaining factors range from 7% to 14%.

**40-50 years:** Highest respondents, i.e. 18%, have rated comfort level as the most important factor closely followed by glass quality at 17%. Least important factor is online availability as only 6% respondents have replied in its favor.

**50 year and above:** Glass quality is the highly rated factor at 17%, in this age group, leaving behind ‘comfort level’ at 16% on 2\textsuperscript{nd} rank. Durability and guarantee are other important factors with 14% and 13% respondents in its favor respectively, for this group.
2. Responses based on number of years of wearing spectacles:

Usage from 0-2 years: Above figure shows that highest respondents, i.e. 16%, have rated comfort level as the most important factor in buying a spectacle. Second preference has been given to brand image at 14%. 3rd rank is jointly accorded to glass quality and frame material with 13% respondents in its favor. Least important factor is online availability at just 5%.

Usage from 2-4 years: Figure shows that highest respondents i.e. 19% have chosen comfort level as the most important factor in buying a spectacle. Glass quality is the second most important factor at 16%. Frame quality, durability and guarantee are jointly chosen as 3rd most important factor by this group with 12% respondents voting in their favor, individually.

Usage from 4-6 years: Glass quality is the highly chosen factor with 16% respondents in its favor. Comfort level is the second most important factor in this category with 14% respondents in its favor. Brand’s image, durability and guarantee are other important factors with 13%, 12% and 12% respondents in its favor respectively.

Usage from 6-10 years: In this category, highest respondents i.e. 16% have rated comfort level as the most important factor closely followed by glass quality at 15%. Durability and guarantee are jointly chosen as 3rd most important factors with 13% respondents in its favor.

3. Responses under various age groups – branded and local:

<table>
<thead>
<tr>
<th>Reason</th>
<th>Respondents of age group 20-30 wearing spectacles</th>
<th>Respondents of age group 30-40 wearing spectacles</th>
<th>Respondents of age group 40-50 wearing spectacles</th>
<th>Respondents of age group 50 &amp; above wearing spectacles</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Branded</td>
<td>Local</td>
<td>Branded</td>
<td>Local</td>
</tr>
<tr>
<td>REASONABLE PRICE</td>
<td>6%</td>
<td>8%</td>
<td>5%</td>
<td>8%</td>
</tr>
<tr>
<td>FASHIONABLE &amp; TRENDY</td>
<td>7%</td>
<td>7%</td>
<td>5%</td>
<td>5%</td>
</tr>
<tr>
<td>EASY AVAILABILITY</td>
<td>6%</td>
<td>8%</td>
<td>6%</td>
<td>10%</td>
</tr>
<tr>
<td>GOOD FRAMES</td>
<td>8%</td>
<td>8%</td>
<td>9%</td>
<td>9%</td>
</tr>
<tr>
<td>GOOD LENSES</td>
<td>8%</td>
<td>8%</td>
<td>9%</td>
<td>9%</td>
</tr>
<tr>
<td>FITTING</td>
<td>8%</td>
<td>9%</td>
<td>9%</td>
<td>9%</td>
</tr>
<tr>
<td>COMFORT LEVEL</td>
<td>10%</td>
<td>8%</td>
<td>9%</td>
<td>6%</td>
</tr>
</tbody>
</table>
AGE GROUP-WISE RATING (MOST IMPORTANT FACTOR) – BRANDED & LOCAL SPECTACLES

The above table indicates ratings given by respondents from various age groups in respect of both branded & unbranded spectacles on seven parameters, in all, like good lenses, good frames and fashionable & trendy.

20-30 years age: According to this age group, in case of comfort level, branded spectacles are ahead with 10% rating as compared to 8% for local spectacles. On remaining parameters, local spectacles have got more preference with a margin of 1 to 2 percent over branded spectacles.

30-40 years age: Respondents under this age group have given similar ratings to branded and local spectacles on parameters like Good frames, fitting and fashionable & trendy. In case of comfort level and good lenses, branded spectacles are ahead of unbranded spectacles with a margin of 3% and 1% respectively. On remaining parameters, unbranded spectacles have got more preference of respondents with a margin of 3 to 4 percent over branded spectacles.

40-50 years age: Respondents here have given same rating to branded and unbranded spectacles on reasonable price as a parameter. Branded spectacles have got more responses on parameters of good lenses, fitting and comfort level by margin of 1 to 2 percent. Unbranded spectacles have got more ratings on other parameters like fashionable & trendy, easy of availability and good frames. Difference of margin varies from 1 to 4 percent.

50 years and above: Branded spectacles have got more responses on parameters of good frames, good lenses, fitting and comfort level, whereas, unbranded spectacles have got more ratings on parameters of reasonable price, fashionable & trendy, easy of availability and good frames.

4. Responses under number of years of wearing spectacle – branded and local:

<table>
<thead>
<tr>
<th>Reasonable price</th>
<th>Branded</th>
<th>Local</th>
<th>Branded</th>
<th>Local</th>
<th>Branded</th>
<th>Local</th>
<th>Branded</th>
<th>Local</th>
</tr>
</thead>
<tbody>
<tr>
<td>Fashionable &amp; Trendy</td>
<td>6%</td>
<td>7%</td>
<td>5%</td>
<td>9%</td>
<td>5%</td>
<td>7%</td>
<td>5%</td>
<td>9%</td>
</tr>
<tr>
<td>Easy Availability</td>
<td>7%</td>
<td>9%</td>
<td>5%</td>
<td>9%</td>
<td>5%</td>
<td>7%</td>
<td>5%</td>
<td>10%</td>
</tr>
<tr>
<td>Good Frames</td>
<td>6%</td>
<td>7%</td>
<td>8%</td>
<td>7%</td>
<td>9%</td>
<td>9%</td>
<td>9%</td>
<td>8%</td>
</tr>
<tr>
<td>Good Lenses</td>
<td>8%</td>
<td>8%</td>
<td>8%</td>
<td>7%</td>
<td>9%</td>
<td>8%</td>
<td>9%</td>
<td>7%</td>
</tr>
<tr>
<td>Fitting</td>
<td>7%</td>
<td>8%</td>
<td>8%</td>
<td>9%</td>
<td>8%</td>
<td>8%</td>
<td>9%</td>
<td>8%</td>
</tr>
<tr>
<td>Comfort Level</td>
<td>12%</td>
<td>7%</td>
<td>9%</td>
<td>7%</td>
<td>10%</td>
<td>8%</td>
<td>9%</td>
<td>8%</td>
</tr>
</tbody>
</table>

RATING BY YEARS OF USE (BRANDED & LOCAL SPECTACLES) - MOST IMPORTANT FACTOR

0-2 years of use: As per above table, respondents using spectacles from 0-2 years have rated branded spectacles as considerably ahead of unbranded spectacles in terms of comfort level with a 5% margin. They have given equal rating to branded and unbranded spectacles on parameter of good lenses (8%). Unbranded spectacles have got more ratings on parameters of reasonable price (7%), fashionable & trendy (7%), easy availability (9%), good frames (8%) and fitting (8%).

2-4 years of use: Respondents using spectacles for 2-4 years have rated branded spectacles ahead of unbranded spectacles on parameters of good frames, good lenses and comfort level at 8%, 8% and 9% respectively. They have equally rated branded and unbranded spectacles on ‘fashionable and trendy’
(7%). Unbranded spectacles have got more ratings on parameters of reasonable price, easy availability and fitting (9% each).

**4-6 years use:** Respondents from this group have rated branded spectacles ahead of unbranded spectacles on parameters of good lenses and comfort level. They have equally rated branded and unbranded spectacles on parameter of good frames & fitting. Unbranded spectacles have got more ratings on parameters of reasonable price, fashionable & trendy and easy availability.

**6-10 years use:** As per this group, branded spectacles are ahead of unbranded spectacles on parameters of good frames, good lenses, fitting and comfort level (all at 9%). Unbranded spectacles have got more ratings on parameters of reasonable price, fashionable & trendy and easy availability at 9%, 6% and 10% respectively.

**5. Responses of under various occupations:**

<table>
<thead>
<tr>
<th></th>
<th>Respondents in public service</th>
<th>Respondents in private jobs</th>
<th>Respondents in business</th>
<th>Respondents who are students</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Branded</td>
<td>Local</td>
<td>Branded</td>
<td>Local</td>
</tr>
<tr>
<td><strong>Reasonable price</strong></td>
<td>7%</td>
<td>8%</td>
<td>5%</td>
<td>8%</td>
</tr>
<tr>
<td><strong>Fashionable &amp; Trendy</strong></td>
<td>5%</td>
<td>6%</td>
<td>6%</td>
<td>5%</td>
</tr>
<tr>
<td><strong>Easy Availability</strong></td>
<td>5%</td>
<td>9%</td>
<td>6%</td>
<td>10%</td>
</tr>
<tr>
<td><strong>Good Frames</strong></td>
<td>10%</td>
<td>9%</td>
<td>8%</td>
<td>8%</td>
</tr>
<tr>
<td><strong>Good Lenses</strong></td>
<td>9%</td>
<td>9%</td>
<td>8%</td>
<td>8%</td>
</tr>
<tr>
<td><strong>Fitting</strong></td>
<td>8%</td>
<td>6%</td>
<td>8%</td>
<td>8%</td>
</tr>
<tr>
<td><strong>Comfort Level</strong></td>
<td>10%</td>
<td>8%</td>
<td>10%</td>
<td>7%</td>
</tr>
</tbody>
</table>

**RATING BY OCCUPATION (MOST IMPORTANT FACTOR) – BRANDED & LOCAL SPECTCLES**

**Public service:** As per above table, respondents in public service have rated branded spectacles ahead of unbranded spectacles on parameters of good frames (10%) fitting (8%) and comfort level (10%). Unbranded spectacles have got marginally higher ratings on parameters of reasonable price (8%), fashionable & trendy (6%) and substantially higher for availability at 9%. Respondents have given equal rating to both spectacles on parameter of good lenses at 9%.

**Private service:** These respondents have rated branded spectacles ahead of unbranded spectacles on parameter ‘fashionable & trendy’ and comfort level. Unbranded spectacles have got more ratings on parameters of reasonable price, easy availability. Respondents have given equal rating to branded and unbranded spectacles for good frames, good lenses and fitting at 8% each.

**Businessmen:** Respondents who are doing business have rated branded spectacles ahead of unbranded spectacles on parameters of good frames and comfort level (10% each). Unbranded spectacles have got more ratings on parameters of reasonable price (7%), fashionable & trendy (7%), easy availability (7%) and fitting (10%). Respondents have given equal rating to branded and unbranded spectacles on a parameter of good lenses at 8%.

**Students:** Students have rated branded spectacles ahead of unbranded spectacles on parameters of good lenses (9%) and comfort level (10%). Unbranded spectacles have got more ratings on parameters of reasonable price, easy availability and fitting at 7%, 8% and 9% respectively. Respondents have given equal rating to branded and unbranded spectacles on parameters of fashionable & trendy and good frames at 6% and 8% respectively.
FINDINGS

Findings that reflect top factors affecting the decision making of respondents while buying new spectacles are as under:

On parameters affecting choice of buying a spectacle

1. Majority age groups have rated comfort level as the most important factor while buying a new spectacle, closely followed by quality of glass as second most important factor.
2. Respondents belonging to age group 50 years or above chose to respond that quality of glass is the most important factor and comfort level is secondary for them while buying a new spectacle. Similar sentiment is expressed by the respondents using spectacle for 4 to 6 years. Interestingly, respondents using spectacle for 0 to 2 years have stated that it is the brand image which is the second most important factor after comfort level.
3. Majority of respondents in the age group of 30-40, 40-50 and above 50 have rated durability of the spectacle as the third most important parameter for them, whereas age group of 20-30 stated brand image as 3rd most important factor.
4. Respondents using spectacles for 6 - 10 years also rated durability as the third most important factor for buying a spectacle.
5. Durability, frame material and guarantee were selected as the third most important factor for buying a spectacle by those ‘using spectacle for 2 to 4 years’.
6. Glass quality and frame material was selected as the third most important factor for buying a spectacle by respondents ‘using spectacle for 0 to 2 years’.
7. Respondents ‘using spectacles for 4 to 6 years’ selected brand image as the third most important factor for buying a spectacle.
8. Guarantee of the product, brand image, frame material were other less important parameters while buying a spectacle.

Comparative preference level between Branded & Local spectacles

In second phase of the study, respondents were asked to rate their preference level on various parameters for both branded and unbranded spectacles. It enabled a direct comparison between the two categories of spectacles on various important parameters. Here ‘occupation’ was also considered as a third criterion and that included respondents in public service, private service, business and students (the other two categories were age and number of years of use of spectacles).

Findings for the same are as under:

1. On age wise analysis, local spectacles have got higher rating on parameters of reasonable price, fashionable & trendy and easy availability, whereas branded spectacles have more rating on parameters of good lenses, fitting and comfort level. On the parameter of good frames, equal rating has been given to both branded and local spectacles.
2. On analysis by number of years of use of spectacles also, local spectacles have got higher rating on parameters of reasonable price, fashionable & trendy, easy availability and fitting, whereas branded spectacles have got more rating on parameters of good frames, good lenses, and comfort level.
3. For occupation wise analysis local spectacles have got higher rating on parameters of reasonable price, fashionable & trendy and easy availability, whereas branded spectacles have got more rating on parameters of good frames, good lenses, fitting and comfort level.
4. As shown in table below, local spectacles have got higher rating on parameters of reasonable price, fashionable & trendy, easy availability and fitting, whereas branded spectacles have got more rating on parameters of good frames, good lenses and comfort level.
<table>
<thead>
<tr>
<th>Parameters</th>
<th>Branded Spectacles</th>
<th>Unbranded (local) Spectacles</th>
</tr>
</thead>
<tbody>
<tr>
<td>Reasonable price</td>
<td>✓</td>
<td></td>
</tr>
<tr>
<td>Fashionable &amp; Trendy</td>
<td></td>
<td>✓</td>
</tr>
<tr>
<td>Easy Availability</td>
<td></td>
<td>✓</td>
</tr>
<tr>
<td>Good Frames</td>
<td>✓</td>
<td></td>
</tr>
<tr>
<td>Good Lenses</td>
<td>✓</td>
<td></td>
</tr>
<tr>
<td>Fitting</td>
<td></td>
<td>✓</td>
</tr>
<tr>
<td>Comfort Level</td>
<td>✓</td>
<td></td>
</tr>
</tbody>
</table>

Thus, it can be said that local spectacles have earned more ratings than branded spectacles. It can be further observed that on parameter of fitting, both the two categories of spectacles are almost equal with local spectacles having marginally better ratings. As expected, respondents opined that unbranded spectacle are reasonably priced and are easily available. Majority also believed that that they are more fashionable and trendy and have better fitting than branded spectacles.

**SUGGESTIONS**

**Local Spectacles:** Study reveals that market for unbranded spectacles is quite strong and people prefer them over branded spectacles on several parameters. But local spectacles must improve upon parameter of comfort and improve their overall performance. Similarly, majority has rated local spectacles as lagging behind in term of good frames and good lenses. These are other areas where local spectacles must improve upon to better their performance.

**Branded Spectacles:** The study also reveals several unanticipated facts about perception of respondents in respect of branded spectacles. For instance, on the parameter of “fashionable & trendy”, local spectacles outperform branded spectacles comprehensively. In case of fitting of a spectacle also, local spectacles have got overall higher rating than branded spectacles. This comes as a surprise considering the prices of branded spectacles. These brands must make their products available in local markets to make them more accessible to the general public.

There is a strong sentiment among respondents about the pricing of branded spectacles as most of them have rated their pricing as unreasonable. Spectacles brands would be better off by introducing budget friendly spectacles for the younger generation.

**BIBLIOGRAPHY**

