



OPTOMETRY IN INDIA

(An overview of Optometry services in India in terms of optical outlets, eye hospitals and educational institutes)

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A Survey report on the number of Optical outlets, Eye hospitals and Optometry institutions in India.

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1. Executive Summary

This report provides an overview of the optometry services available in India in terms of number of Optical outlets, Eye hospitals and Optometry Institutes. The information provided in this report is based on an online survey conducted over a one month period. Survey results shows **there are approximately 800 retail Optical chain outlets, 1312 specialty eye hospitals and 164 optometry institutes in India.** A further advanced research is intended in future based on this report.

2. Background

2.A: Indian Economy and Population¹

India is a large country with total area of 3.28 million sq. km., sharing land border with six countries, and a long coastline of 7,517 km. The country is a federation of 29 states and 7 union territories (administrative units) and is a unique market on account of its diversity in age, income, and urban-rural demographics. The largest among Indian states is Rajasthan and the smallest, Goa. Mumbai, Kolkata, Delhi, Hyderabad and Chennai are the most populated and wealthiest cities, closely followed by Bangalore, Ahmedabad, Pune, Vadodara and Kanpur.

Nearly 58 million households, comprising 31.16% of India's dwelling units, live in urban areas. Nearly 38% of urban households are in middle and higher income strata, and only 14% of rural households have similar income levels. More than 68.84% of India's population lives in rural areas. While the growth in the urban population is expected to outpace growth in the number of rural inhabitants, the trend towards urbanization is less dramatic compared to China and other major developing countries.²

The top seven cities Mumbai, Delhi, Chennai, Kolkata, Hyderabad, Ahmedabad and Bangalore, together have over 6 million homes falling in the upper socio-economic strata. India has 40 cities in tier 2 category Kochi, Coimbatore, Kanpur, Gwalior etc.

2.B: Overview of health and vision care in India

The size of the overall healthcare sector in India is estimated to be INR 395,000 crores (\$78 billion), with a historical five year growth rate of 15% (CAGR).³ The forecast shows an impressive growth in the Indian healthcare sector which is expected to continue well into the future to an impressive INR 14, 00,000crores (\$280 billion) by 2020.⁴

However, while the healthcare sector in India has grown, wide disparities still exist with respect to accessibility. While rural population have almost no access to qualified medical care, medical tourists as well as upper economic strata individuals residing in urban areas receive affordable standard services provided by the growing corporate chain of hospitals. As a stark example of this disparity, in 2010, nearly 66% of surgeries took place at the urban facilities inhabited by 31% of the population.

India has one of the largest population of unnecessarily blind and vision impaired individuals in the world; totalling 15 million people. This group is geographically widespread, with a vast majority living in rural areas. Yet, less than

¹Optical Sector in India 2008, Ace Global, On Behalf of Italian Trade Commissioner,2008

²McKinsey Global Institute, July 2010

³Compound annual growth rate

⁴IBEF Healthcare Market Overview and Trends, November 2011

3% of India's 840,130 doctors have completed specialist medical training in vision care, and for those that have, relatively few live and practise outside tier I and II cities⁵. Unless the healthcare services are made more widely accessible, regional demand is expected to remain largely unfulfilled. For example, people in rural areas often suffer from refractive blindness resulting from the prohibitive travel time and costs of getting a pair of glasses.⁶

The impact to the Indian economy of lost potential productivity due to avoidable causes of blindness is estimated to be INR 187,000 crores or \$34 billion per annum (2008), with INR 126,500 crores or \$23 billion alone due to uncorrected refractive error. Ironically, the Indian vision care industry which has been growing strongly in 2012 is projected to be less than INR 11,000 crores or \$2 billion in total annual sales or less than 2.5% of the total Indian healthcare sector; and imports more than 70% of its spectacle needs, or more than 50 million pairs of spectacles from China each year.⁷

This report is an attempt to accumulate the statistics concerning eye care services in India and the wide disparity that exists geographically among optical outlets, eye hospitals and optometry institutions across the country.

3. Methodology

The data provided in this report is purely based on online research. State wise analytical report has been compiled using information sourced through reliable online search engines. Comments from experts from particular fields have been incorporated in the report.

4. Optical retail chain outlets in India

Optical retail chain outlets in India dispense spectacles, contact lenses and sunglasses as per the requirement of the patients. The optical outlets either have their own optometrist or dispense glasses based on the prescriptions.

Our research shows that approximately,

- There are approximately 800 optical retail chain outlets in India according to the experts in that particular field
- 15 % optical retail chains belong to the: Lawrence & Mayo, Bon Ton opticals, GKB opticals, Titan eye plus, Himalaya opticals, Vision Express and Ben Franklin. Retail sector is fragmented and 85% of the outlets are mostly stand alone, small shops in local shopping center.
- Presence of retail chain is found to be greater in Maharashtra, Karnataka, Tamil Nadu, Telanagana, Gujarat and West Bengal and least in Meghalaya, Mizoram and Dadra and Nagar Haveli.

Most of the retail chains are located in the main cities and the smaller optical outlets are spread across all the urban and rural parts of the country.

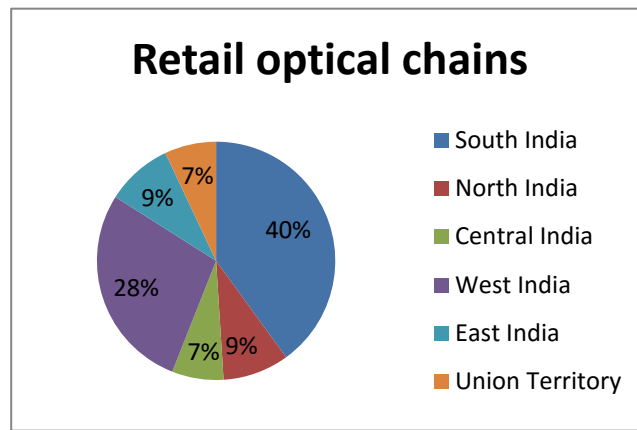
An approximate state wise break up based on online research is given in Appendix IA.

The pie chart below shows approximate distribution of Optical retail chains across India.

⁵<http://www.indiavisioninstitute.org/BusinessPlan.pdf>

⁶McKinsey Quarterly, Innovation blowback: Disruptive management practices from Asia, February 2005

⁷<http://www.indiavisioninstitute.org/BusinessPlan.pdf>



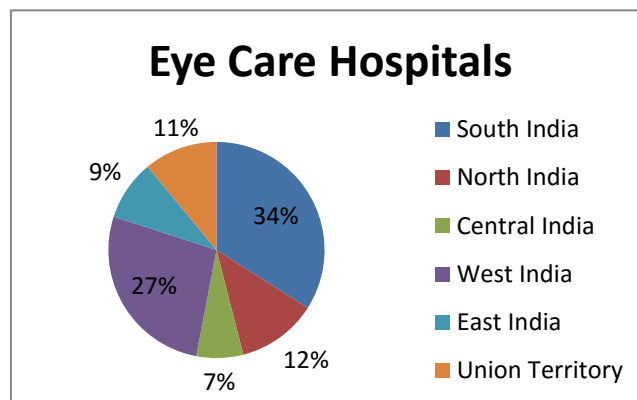
5. Eye hospitals in India

Eye hospitals in India are spreading their services across the urban and rural belt. Similar to optical outlets, the eye hospitals in India are found to have varied pattern in distribution. The hospitals are either set up as part of a chain, as individual private clinic or as sub specialty in a multispecialty hospital.

- India has approximately 1280 eye hospitals as found through our online research, including the major chains. Most of the major hospitals are found to be in urban belt.
- While there are many eye hospitals in urban India, primary eye care is not well-established in rural parts of the country. Though the secondary and tertiary eye care facilities have come up in several cities, there is a vacuum existing due to the lack of organized primary eye care sector in rural India.⁸

Appendix II A gives a state wise report on approximate number of eye hospital in India.

The pie chart below shows the approximate distribution of eye hospitals in India.



⁸http://www.sightsaversindia.in/in_depth/policy_and_research/16482_Eyecare%20in%20India%20-%20A%20Situation%20Analysis.pdf

6. Optometry institutes in India

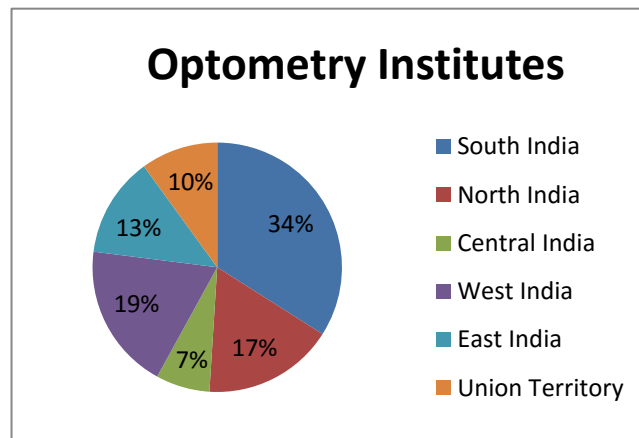
Optometry schools in India play a crucial role in servicing the current national need for over 115,000 Optometrists. With only 49,000 four and two-year trained Optometrists available currently(as on 2016), there is a tremendous challenge for India; both in terms of strengthening existing schools as well as developing new schools.

- There are a total of **164** institutions providing Optometry as a primary eye care program in India. The various optometry courses offered include diploma, bachelors and master's degree.
- Diploma in Optometry is offered by **72**institutions; Bachelors in Optometry is offered by **101**institutes; Masters in Optometry is offered by **18** institutions and PhD is offered by only one institute.

The IVI report provides a snapshot of the approximate number of optometry institutes across India and also a glimpse into the uneven spread of schools across the country. A detailed report is available on the IVI website.⁹

Appendix III A gives a state wise report on approximate number of optometry institutes in India.

The pie chart below shows approximate distribution of Optometry Institutes across India



Appendix IV will give a snapshot of region wise distribution of Optical outlets, Eye hospitals and Optometry institutes in India. We have categorized it as North, South, East, West, Central India and Union Territories.

7. Appendices

Appendix I - Approximate number of retail Optical chains in India

Appendix II - Approximate number of Eye Hospitals in India

Appendix III - Approximate number of Optometry Institutes in India

⁹<http://www.indiavisioninstitute.org/resources-files/1004IVI%20-%20STATUS%20REPORT%20ON%20INDIAN%20OPTOMETRY%20SCHOOLS%202015.pdf>

Appendix I A –Retail Optical outlet chains in India

S.No	State	No of retail optical Chains
1	Andhra Pradesh	48
2	Assam	2
3	Bihar	5
4	Chhattisgarh	8
5	Gujarat	81
6	Haryana	24
7	Jammu and Kashmir	2
8	Jharkhand	9
9	Karnataka	103
10	Kerala	26
11	Madhya Pradesh	12
12	Maharashtra	143
13	Meghalaya	1
14	Nagaland	1
15	Orissa	11
16	Punjab	21
17	Rajasthan	11
18	Tamil Nadu	83
19	Telangana	61
20	Tripura	1
21	Uttar Pradesh	27
22	Uttarakhand	4
23	West Bengal	61
S.No	Union Territory	No of retail optical chains
1	Puducherry	1
2	Delhi	54
	<i>Total no. of Optical retail chains in India (approximate figure)</i>	800

Appendix II - Approximate number of Eye Hospitals in India

S.NO	State	No of Eye Hospitals
1	Andhra Pradesh	51
2	Arunachal Pradesh	1
3	Assam	4
4	Bihar	5
5	Chhattisgarh	10
6	Goa	2
7	Gujarat	117
8	Haryana	47
9	Himachal Pradesh	1
10	Jammu and Kashmir	3
11	Jharkhand	6
12	Karnataka	99
13	Kerala	59
14	Madhya Pradesh	29
15	Maharashtra	202
16	Manipur	1
17	Meghalaya	1
18	Mizoram	1
19	Nagaland	1
20	Odisha	28
21	Punjab	105
22	Rajasthan	42
23	Sikkim	0
24	Tamil Nadu	177
25	Telangana	48
26	Tripura	0
27	Uttar Pradesh	49
28	Uttarakhand	1
29	West Bengal	75
S.No	Union Territories	No. of Eye Hospitals
1	Andaman and Nicobar Islands	2
2	Chandigarh	9
3	Dadar and Nagar Haveli	1
4	Daman and Diu	0
5	Delhi	102
6	Lakshadweep	1
7	Pondicherry	7
	Total no. of Eye hospitals in India (approximate figure)	1312

Appendix III A - Optometry Institutes in India

S.No	State	No. of Institutes
1	Andhra Pradesh	7
2	Assam	3
3	Bihar	4
4	Chhattisgarh	1
5	Gujarat	9
6	Haryana	2
7	Jammu and Kashmir	1
8	Jharkhand	1
9	Karnataka	7
10	Kerala	20
11	Madhya Pradesh	5
12	Maharashtra	23
13	Meghalaya	2
14	Nagaland	1
15	Punjab	2
16	Rajasthan	3
17	Tamil Nadu	18
18	Telangana	5
19	Tripura	1
20	Uttar Pradesh	18
21	Uttarakhand	1
22	West Bengal	14
	Total	149
S.no	Union Territories	
1	Chandigarh	3
2	Delhi	12
	Total	15
	Total no. of Institutes in India	164

8. Disclaimer

The report is compiled based on the online survey and the details collected are from www.justdial.com, www.grotal.com, www.asklaila.com, <http://www.hospitalkhoj.com> and other websites of respective institutions / retail chains / hospitals etc. IVI is not responsible for the inaccuracies incurred in terms of the name, location or number of optical outlets, eye hospitals or optometry institutions. There might be additional Optometry services available in all these categories owing to being not listed in the above mentioned search engines.

9. Acknowledgements

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