

## Consumer Behaviour Characteristics in Optometry and Optical Dispensing Sector

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### Abstract

The optometry and optical dispensing sector faces major challenges due to the healthy eyesight impact on the quality of life both at individual and global level. The demographic growth, the population aging and the new communication technologies cumulated with the prevalence of myopia, early cases of far-sightedness and market flooding with devices affecting eye-sight on long term, represent factors leading to the increase of the consumer segment in need of corrective optical equipment. And when we say corrective, we also think to their protective role, taking into account the impact of the ultraviolet radiations and the blue light exposure. Therefore, based on the growing need for highly customised and qualitative optical equipment – corrective glasses, sunglasses or contact lenses, we expect an increase of approximately 55% by 2020 in the optical goods and services market. In the primary eye care sector, the wearers present a complex purchasing behaviour based on a comprehensive study of all options, requiring their close involvement and a long period of evaluation. Due to the purchase's circumstantial character for individual optical equipment (IOE) – the selection comprises personal factors (age, gender, refractive error, various physiognomies, lifestyle, budget), psychological factors (motivation, perception, learning, ideas, attitude), social factors (their role in the specific group or their affiliation) and cultural factors – these personal polyvalent objects are perceived as expensive goods. This article attempts to describe the main characteristics of the purchase behaviour for each category of optical equipment having the consumer in a co-producer role. The purchase of an IOE is the result of a process taking up to 100 – 120 minutes. Faced with a dynamic market, influenced by fashion trends, innovations and technologies, the eye-care providers seek to consolidate their relationships with the customers and increase the retention of the existing ones, emphasising on generating a higher satisfaction degree, facilitating the experience up to the purchase and maintaining a continuous after-sale interaction.

**Key words:** optometry and optical dispensing sector, consumer's behaviour, corrective optical equipment, co-producer customer, customer purchasing process, decision-making process.

**JEL classification:** M31.

### I. Introduction

At global level, the optometric and optical sector shows economic growth, and the factors determining this trend are the demographic growth, population aging, the fact that approximately 70 to 75% of the worldwide population is in need of visual correction (ROB, 2016, page 11), the renewal rate of the informational technologies and the internet expansion, and the fact that the eye care products and services present a high profit margin. The permanent research and the renewal rate of the technologies associated to visual correction offer new opportunities for opticians and the promise of higher incomes (ROB, 2016, page 11). Also, according to a report from Retailers Association of India and Boston Consulting Group, the e-commerce market is expected to grow and, until 2021, the volume of sales will reach approximately 50 – 55 billion dollars, meaning 6 times higher than the current level estimated to 6 – 8 billion dollars (Martins, 2017).

The optical products market presents several players, and the competition is strong both among manufacturers and eye care optical centres, independent opticians within large stores or online stores. In order to have a profitable business, the retailers of optical goods permanently conduct marketing researches from primary or secondary sources in order to be informed and make decisions on the consumer behaviour in the optometric and optical goods and services sector. Therefore, this article will attempt to outline some of the conceptual models envisaging the purchase decision-making process of the individuals and the specific elements in studying the

consumer behaviour for optometric and optical products from the perspective of the commercial activities, consumer behaviour in relation to the image of the eye care products store and the lifestyle of these specific consumers.

## II. Literature review

The references used to document this article were selected from the specialty literature both from Romania and abroad, as well as from online sources, aiming at supporting both the presentation of the theoretical concepts mentioned in this study (consumer behaviour, decisional purchasing process, etc.) and the clarification of the specific elements pertaining to the eye care and visual correction field.

For statistical data and the elaboration of conclusions regarding the specific behaviour of optical products consumers, I approached secondary marketing researches based on the studies conducted by the largest players in the optometric and optical industry, respectively Luxottica (for the corrective glasses, sunglasses and associated accessories) and Essilor (for the corrective lenses).

Consumer behaviour is a multi-dimensional concept, resulting from a system of dynamic relations between processes of perception, information, motivation and actual manifestation of the human behaviour, based on consumer or group integration on the goods and services market offered by the present society and related to purchasing decision-making process (Cătoi, 1997, page 26).

The optical goods consumer is more competent, has high expectations due to easy access to information, high level of education and more sophisticated preferences. He/she wishes to have access to memorable experiences, attracted by the multitude of optical goods currently on the market, which satisfy a variety of visual needs. He/she usually conducts an online research during the pre-purchase stage of a product and pays attention to the online opinions and recommendations (ROB, 2016, page 9). According to studies (WMido.com, 2015), the average price paid for a pair of corrective glasses is approximately 268 Euros (including the corrective lenses) and for a pair of sunglasses approximately 79 Euros.

## III. Data analysis & Findings

### 3.1. *Consumer behaviour – Conceptual background*

Marketers' main task is to understand consumer behaviour in order to have a comprehensive image of why individuals choose to act and use the goods and services of a certain company. In this context, the information gathered in their behaviour is essential in planning and improving those goods and services, in establishing prices, in promotion and placement decisions, as well as other managerial actions. Basically, in making purchasing decisions that satisfy their needs and desires, consumers are influenced by numerous personal, social and economic factors. In order to study consumer behaviour, marketers can use various models, among the most utilised mentioning the individual as economic being, the social influences and personal factors (Holdford, 2012, page 130).

*The individual as economic being model* states that, a large part of the consumer behaviour information obtained by companies comes from the economic environment. This model is based on hypothesis such as: consumer behaviour is rational; consumers tend to obtain maximum satisfaction with less effort through exchanges; individuals possess information on available alternatives and use it in the purchasing decision-making process (Bradley, 1995, page 452). Marketers use this model to gather information on the influence of the price range on the purchasing decision, on consumers' preferences or their incomes.

*The social influences model* emphasises the fact that, from birth, human behaviour is influenced by interactions with other individuals. These influences may come from family, friends, co-workers or school and affect the purchasing and consumption decisions throughout their entire

life.

In selecting a pair of corrective glasses, the optical products consumers are influenced by the following elements: the advice of the optician or optometrist (it represents the most important factor in choosing an optical device), the weight of the glasses, the acknowledgement of the benefits for their visual health, the types of materials used in manufacturing optical products, the colour, the comfort and the design of the spectacle frames (Eyewear Intelligence, 2015).

*The personal factors model* shows that each individual is influenced in his/her purchasing decisions by personality, values and convictions.

In order to understand the purchasing behaviour, in their marketing research on consumer behaviour, marketers take into account the three above-mentioned models and also social and demographic variables (such as age, social and household level, etc.).

**The purchasing decisions of the consumers** are grouped in two main categories: new and repeated decisions.

*The new decisions* result either from extensive analysis or research undergone by consumers in order to make a decision to purchase a product or service considered to be important or valuable, or limited analysis, when the purchasing decision for certain products or services is made on an impulse, without needing a long mental effort or research for various alternatives.

When acquiring a new pair of corrective glasses, in their purchasing decision, the individuals are influenced (Bailey, 2014) by a re-examination and update of visual needs, the recommendations of the ophthalmologist, the use of the insurance policy (60% of the wearers own and use an insurance policy in the USA), the promotional actions (price discounts, coupons, etc.) and the desire to buy spectacle frames from famous brands or designer collections.

*The repeated decisions* require less decision-time from individuals comparing to the new ones and a limited analysis of the alternatives, consumers using here their previous experience based on past decisions.

In order to determine the consumers to make repeated purchases of optical goods, companies in the eye care sector need an efficient customer relations management, therefore building customer loyalty becoming a priority.

**The purchasing decision-process** is based on consumer's actions grouped as follows: pre-purchase, purchase and post-purchase of goods and services (Bateson, 1992, page 84).

During the purchasing decision-making process for optical products, in the pre-purchase stage, the consumers are influenced by the following factors (Eyewear Intelligence, 2015): 52% by the sales personnel (optician, optometrist or ophthalmologist), 25% by the online evaluations (comparisons, information, simulations, etc.), 8 – 10% by PR actions, media advertisement (radio, TV, press) and 13% by the display of the merchandise within the eye care centre and its storefront.

According to other authors, the stages of the purchasing decision-making process include the following elements: problem recognition, information search, evaluation of alternatives, product or service purchase and post-purchase evaluation (Pride, 1997, page 141). Knowledge of the purchasing and consumption behaviour requires understanding the way in which consumers behave during each of the above-mentioned stages.

The purchasing decisions are also influenced by the consumers' tolerance to risk, and the most important types of risks are (Kare, 1996, page 465-470):

- the financial risk targets the loss of certain amounts of money resulting from inappropriate purchases.
- the lack of performance risk refers to situations when a product or service cannot satisfy the need for which it has been purchased.
- the physical risk takes into account the negative or adverse effects resulting from the use of a product or service.

- the social risk implies partial loss of the consumer's image following the purchase of an inappropriate product or service.

### 3.2. *Perspectives in studying consumer behaviour in optometry and optical products and services sector*

In order to study consumer behaviour when purchasing corrective glasses (based on ophthalmological prescription) and sunglasses, taking into account the various distribution channels for these articles, Luxottica Group (the largest manufacturer for optical products worldwide) carried out together with Mintel the execution of a market study (Bailey, 2014).

**The objectives of the research** targeted:

- the identification of the factors taken into account by consumers in their purchasing decision for optical products;
- determining the frequency in renewing corrective glasses and sunglasses;
- the identification of the time spent in making the purchasing decision for optical products;
- the identification of the impact of various promotional activities on the decision-making process for optical products.

**The methodology of the research** comprises:

- *a secondary research*, achieved using the consumer behaviour observation method in purchasing optical products, carried out in 6 (six) Sunglass Hut stores; and
- *a qualitative research*, achieved through Facebook, targeting 55 respondents in order to establish if they were wearing corrective glasses, sunglasses or both categories of optical products. They also conducted 7 (seven) interviews face-to-face to gather information on previous purchases for corrective glasses and sunglasses, and the consumers' opinions on a number of eyeglass websites (the websites proposed were Lookmatic.com, ZenniOptical.com, Glasses.com and CheapGlasses123.com).

**The results of the research** can be outlined following several perspectives: the commercial activities within optometric and optical products stores, consumer behaviour in relation to the image of the optical products store and the lifestyle of optical products' consumers (Cătoi, 2001, page 45), combining them with the results of the Luxottica research study.

*The commercial activities perspective* targets specific activities within manufacturers of optical products and retail and online stores.

As a result of Luxottica's study (Bailey, 2014, pages 5-7), the marketing researchers found the following statistical weight for the most important factors influencing consumer behaviour of optical products:

- 27% of respondents confirmed that they are influenced by promotional activities when purchasing optical goods;
- individuals aged between 18 – 34 consider current fashion trends when making a purchasing decision, and women appreciate mostly the design and the brand of the spectacle frames;
- 36% of the interviewed take into account the authority and trust given to their optician and purchase various types of corrective lenses based on their recommendations;
- a large part of the respondents prefer to make purchasing decisions only after being advised by a specialised optometrist, counting on his/her professional experience;
- 72% of the individuals interviewed choose their prescribed corrective glasses and lenses in approximately 1 (one) hour;
- around 50% of the wearers change the spectacle frames and the corrective lenses every 2 (two) years or after a shorter period;
- 83% of consumers bought only one optical products on their last purchase, and 17% acquired two or more pairs of glasses;

- over 50% of respondents choose first their spectacle frames and then request information on the corrective glasses to be mounted on.

Another study conducted by the market research institute GFK provided data related to sales of sunglasses, corrective lenses, contact lenses and associated products for maintenance and protection (GFK, 2016). Thus, in 2016, the European market of optical products registered sales of approximately 8.8 billion € during the first half of the year. The study took into account the most important European markets, respectively France, Germany, Italy and Spain.

Germany registered during 2016 an increase of approximately 1% comparing to 2015 in optical products sales. Here, 87% of the total sales come from corrective glasses and lenses,

During 2016, Spain showed a decrease in sunglasses sales of 7.5% but, at the same time, an increase of 3.8% in corrective glasses and lenses sales and of 2.8% increase in contact lenses sales.

France presented an increase of 3% in sales of corrective glasses and lenses, category which covers almost 60% of the total sales of optical products.

The situation in Italy proved favourable, registering increases of approximately 5% in sales on all categories of optical products.

According to GFK study, in Europe, during the first half of 2016, the corrective glasses and lenses had an 80% weight from the total of optical products' market.

*The consumer behaviour in relation to the image of the optical products store* comprises the most important attributes defining an optometric and optical goods store.

*The specific product offer* in an optometric and optical goods store includes corrective glasses, corrective lenses, sunglasses, contact lenses, associated products for maintenance and protection and other accessories. The corrective lenses represent semi-finished goods, while the corrective glasses, sunglasses, contact lenses and accessories are finished goods. The finished goods can be displayed and tried by consumers within the stores, while the semi-finished goods, i.e. the corrective glasses, will be mounted by the optician on the spectacle frames chosen by the customer, based on their optometric prescription. The consumers evaluate in their purchasing decision the quality of the products, the variety of choices, the post-purchase warranties, as well as other elements.

*The offer of services* in the optometric and optical sector comprises services such as the optometric examination for correction and prescription of the IOE (individual optical equipment), counselling on purchasing the required optical products (corrective lenses, corrective glasses and sunglasses, etc.), the warranty and the post-warranty service. The consumers are influenced in their purchasing decision by the quality of the services provided by the optician, optometrist or ophthalmologist, the methods employed for building consumer loyalty, the store design and its displays, the conditions for returning purchased products, credit policies, post-purchase services.

*The current furnishing*, the store's architecture, the display of the products, the existent medical equipment and its high performance and novelty, the environmental aspect, and also the store's placement, timetable, parking options, etc. represent elements that may influence consumer behaviour on their optical products purchase. The ophthalmologist's office comprises the medical equipment needed for identifying refractive errors, such as: autorefractor, optotypes, vision testers and the related lenses, optical biometer, etc. The eyewear boutiques are furnished with specific display cases for all optical products, also offering adjacent spaces for the consulting of the customer on choosing the spectacle frames, the corrective lenses, sunglasses or contact lenses.

*The image of the store* and the trust given by its customers represent an element which can greatly influence the consumers' purchasing decision.

The main types of optical and optometric goods stores can be: an area in a non-specialised store selling also other types of products, where optical products are accessories, stores which sell

only one category of optical products (for example, only sunglasses). Other categories of sale points may include the eye care stores without an optical lab or an eye clinic facility, or without both. The most important category of store is represented by the specialised visual care stores or ophthalmologic centres, comprising all types of optical and optometric products and services. This type of store is usually divided in three main areas: the eye care clinic, the eyewear boutique and the optical labs for corrective lenses fitting and production of the end product – the corrective glasses (Saracin, 2014, page 9).

As for the Luxottica market study on consumer behaviour, the observations obtained in the Sunglass Hut stores include:

- a part of the individuals entering the store purchased optical products, while others only wanted information;
- upon entering the store, the first thing they did was to try on a pair of sunglasses, and then they requested additional information from the optometrist on the chosen product;
- most individuals came together with their family or friends and their suggestions were taken into account in the purchasing decision;
- when asked why do they buy sunglasses from a retail store and not from an online store, the majority responded that trying the actual glasses is an essential part in their purchasing decision.

*The consumer's lifestyle perspective* nowadays shows us that a large part of the individuals lead a sedentary life, characterised by predominantly indoor activities and less outdoor experiences, therefore their eyesight focusing especially on short distances. The modern lifestyle implies **use of digital devices**. A study conducted in 2016 by ESSILOR, the largest manufacturer of corrective lenses, emphasises the fact that over 90% of persons aged between 20 to 65 use daily digital devices changing on average four different devices, and 89% of users already feel visual discomfort and ocular migraines (ESSILOR, 2017). By using simultaneously several mobile screens, the individuals strain their eyes to additional efforts in order to adapt, and this behaviour generates visual fatigue associated to migraines, ocular itching, pain, blurred vision.

According to Dr. Marcus Safady, ophthalmologist and president of Ophthalmological Society in Brazil (ESSILOR, 2017), the use of digital devices affects both persons already having visual problems and healthy individuals in no need of visual correction, generating asthenopia (or eye strain) associated with migraines, double vision syndrome, concentration problems, etc.

When using mobile devices, our eyes are affected by **a massive emission of blue light** generated by the high number of screen equipped with LED lighting or compact fluorescence. While a part of the blue light (blue-turquoise) is harmless to us because it regulates the biological clock, the other part (violet-blue) negatively impacts our eyes causing macular degeneration, because it penetrates our eyes at profound levels to the other part of the retina, and affects the macula.

In order to protect our eyes of the harmful blue light and to reduce visual fatigue, we need to set the screen to the lowest level of lighting, keep it clean, increase the font size, decrease the environmental lighting, blink as frequent as possible to avoid the dry eye syndrome, and limit the time spent using a digital device.

Also, wearing glasses with special lenses can help the eyes to adapt more easily to the intermediary distance between objects, such as computer screens. ESSILOR recommends wearing the Essilor's Crizal®Prevenia® lenses which help in protecting the eyes against harmful wavelengths.

#### **IV. Conclusions**

The consumer behaviour is dynamic and unpredictable. The buyers are influenced in their purchasing decision for optical goods by the current fashion trends, appreciating especially the

design and the name of the brands when it comes to corrective glasses and sunglasses, by the promotional activities, the product offer and the image of the store, the prices set by the distributors and the post-purchase services, preferring to buy their corrective glasses and sunglasses from actual stores where they can try them and evaluate the way they look and the level of comfort. As for the optical services market (ophthalmological examination and specialised counselling), the consumers are influenced by the recommendations of the ophthalmologist and optometrist.

Nowadays, over 90% of the individuals use daily digital devices, confronting ocular problems that can be remedied by changing their lifestyle and acquiring optical devices that can diminish the harmful effect of the blue light emitted by mobile devices.

In a high competitive market, the manufacturers and retailers playing a role in the optometric and optical goods and services sector invest in market researches in order to study consumer behaviour aiming at satisfying at a high level the consumers' needs and implicitly building a profitable business.

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