Assessing Potential for Establishing Vision Centre

Sohawa, Tehsil Gujjar Khan, District Rawalpindi

Sanghoi, Tehsil & District Jhelum

Lalamusa, Tehsil Kharian, District Gujrat

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Introduction

Civil Society Human and Institutional Development Programme (CHIP) is a leading not for profit national organisation of Pakistan. CHIP has been working on human and institutional development of local communities in various parts of Pakistan since 1993. It has extensive experience of working on integrated development approaches, rehabilitation and inclusion of people with blindness, low vision and cross disability. It has developed its expertise in rehabilitation of people with disabilities, gender, livelihoods, human rights, health, natural resource management, water and sanitation. ICEE and CHIP exchanged ideas about importance of sustainable enterprises, particularly, at the community level for the provision of spectacles which is the most cost-effective intervention in eye care and can significantly reduce the negative consequences of refractive errors, in terms of lost education, employment opportunities, and impaired quality of life. The project idea stems from this discussion and a preparatory period has been proposed to undertake market research and prepare its feasibility initially for vision centres in Sohawa and Sanghoi, District Jhelum, and Lalamusa, District Gujrat, Punjab, Pakistan.

1.1 An Introduction to the Project in Partnership with CHIP and ICEE

CHIP in partnership with ICEE has designed a project on ‘Enterprise for Sight’. The project proposes to address the challenge of a huge unmet need for refractive services at community/household level through a social enterprise approach. This innovative approach will provide quality eye health care while using business principles to sustain and grow uplifting communities and enhancing their socio-economic status. The project aims to develop a social enterprises approach to provide community responsive eye health services leading to sustainable economic development.

1.2 Rationale for Market Research

Market research report will provide basis for preparing financial feasibility for the establishment, running and management of vision centres in Tehsils Sohawa, Jhelum and Kharian. The research will also be useful for neighbouring tehsils and districts for the establishment, running and management of a vision centre. This will also be useful for planning the knowledge attitude and practices survey.

1.3 Specific Objectives of Market Research

The specific objectives of the market research report are as follows:

a. To assess availability and quality of existing Eyesight & Vision (E&V) Services in Sohawa, Lalamusa and Sanghoi;

b. To determine location, pricing, services, target market and marketing tools for the new E&V Service Center at Sohawa, Lalamusa and Sanghoi;

c. To estimate returns on investment and timeframes for breakeven and profit generation;

d. To provide suggestions and recommendations for running E&V Services.

1.4 Research Methodology

1.4.1 Methods Used (FGD, In-depth Interviews, Direct Observation)

Methods used for the research are Focus Group discussion with the active personalities of the communities. Interviews were also conducted with different doctors of private and
government hospitals and opticians. Another tool which was used during the discussions and the interviews was the direct observation to achieve the goal of the research.

### 1.4.2 Types and Number of Respondents

In Lalamusa three hospitals, one THQ in Kharian and two private facilities namely, Dr. Shahid Latif Hospital and Nisar Hospital were found. There are five optical shops available namely, Aftab Optical Services, Nadeem Optics, Rehman Optics, Einak Centre and Ahmed Din Optics. Research revealed that there was only one private facility in Sanghoi, Nisar Dispensary where an eye specialist from Faizan Memorial Hospital Jhelum visited every Thursday.
2 Overview of Services

The vision centre, as envisaged under the ‘Enterprise for Sight’ project, is expected to be a for-profit facility set up to deliver refractive services to the communities in Sohawa, Sanghoi and Lalamusa and the rural settlements in the adjoining villages. The vision centre will be equipped with state-of-the-art ophthalmic equipment such as Keratometer, Lensometer, Slit Lamp, Ophthalmic unit and a Retinoscope. Equipment available will also include blood pressure monitors and diabetes testing equipment. Spectacles and sunglasses will also be available for sale at the centre. To improve the ambiance of the vision centre air conditioning and heating facilities will be available along with generator and UPS to cater to the frequent power outages in the area. The centre will be run by one optometrist and one sales person with adequate educational qualifications and experience. Those examined at the vision centre will be referred, if necessary, to certified government hospitals and available private facilities in the area.

2.1 Vision

CHIP and ICEE aims to create a sustainable enterprise at the community level to provide high quality and low cost refractive services to assist in the reduction of refractive errors and the accompanying negative consequences such as lost education and employment opportunities and impaired quality of life.

2.2 Services Offered by the Vision Centre

The following services will be offered at the vision centre:

a. Vision screening: a relatively short examination to detect the presence of an existing or potential vision problem;

b. Eye examination: performed by an optometrist to conduct both external and internal eye health evaluation, refraction or visual acuity testing and visual field testing;

c. Blood pressure monitoring;

d. Blood sugar testing;

e. Spectacles and sunglasses for sale.

2.3 Challenges

The vision centres in Sohawa, Sanghoi and Lalamusa are socially useful businesses aiming to reduce the prevalence of visual impairment caused by refractive errors and therefore, targets customers from all social segments. The magnanimity of this outreach programme makes the task challenging. Furthermore, there is a need to provide good quality services at low costs in Lalamusa, Sanghoi and Sohawa. It is not yet known whether the enterprise will be able to maintain profits and low prices without compromising on quality.
Pakistan has a total population of 150 million. A recent national survey on prevalence of blindness and visual impairment 2002-2004 has reported the rate to be 0.9% in the country of which 3% is caused by refractive errors. This loss of visual acuity can be attributed mostly to presbyopia, where the flexibility of lens begins to decline with each decade after 30 years of age resulting in individuals requiring visual assistance such as bifocal lenses. Despite the fact that refractive errors are simple to diagnose and treat with spectacles, they are the most common cause of irreversible blindness and permanent low vision. The vision centre aims to eradicate this avoidable condition and improve the socioeconomic prospects of those affected by this disability.

Alongside refractive errors, high blood pressure, especially if uncontrolled for long periods of time, can result in loss of vision and eye diseases. High blood pressure can result in hypertensive retinopathy where untreated high blood pressure can cause permanent vision problems due to damage to optic nerve. Statistics reveal that the overall prevalence of hypertension in Pakistani’s aged 15 years and over was 19%. Studies conducted show that one in three people over the age of 45 suffers from high blood pressure. It was even more alarming that with such high prevalence rates, more than 70% of the population was unaware of their condition and not even 3% had sufficiently controlled blood pressure.

The most serious condition caused by increased blood sugar levels is diabetic retinopathy due to unusual changes in blood sugar levels resulting in blurred vision which comes and goes according to the changes in blood sugar levels. Increased blood sugar levels can also cause the lens of the eye to go cloudy causing cataracts. All of these conditions are caused by untreated diabetes and chances of contracting these eye diseases vary directly with the time that it goes untreated. Furthermore, studies from June 2010 reveal that prevalence of diabetes in Pakistan is between 7.6% and 11%. Moreover, it has been estimated that by 2020, Pakistan will be the 4th most heavily populated country in the world in terms of diabetes.

According to the Situation Analysis of Refractive Services in Pakistan, 2006, there are refractive services offered in most parts of Pakistan. According to the report, there were currently 868 ophthalmologists in the private sector, 235 hospitals either specific eye care hospitals or eye units in general hospitals, and less than 200 optometrists offering refractive services all over the country. There are about 6.3 million refractions done per year and approximately 2 million spectacles dispensed per year by 1352 opticians in the private sector. While these figures suggest that the refractive needs of the country are being met, studies show that there is still unmet need for high quality services in rural areas of Pakistan.
4 Key Findings in Sohawa

4.1 Demographics of Sohawa
Sohawa is a Tehsil headquarter of District Jhelum, having 10 Union Councils. Population of Sohawa is about 214,734 of which 50% are male and 50% female. Statistics pertaining to eye diseases reveal that decreased vision, cataract and glaucoma are the most common diseases prevalent in Sohawa.

4.1.1 Number of Union Councils and Villages
Tehsil Sohawa consists of ten Union Councils namely, Adrana, Domeli, Jajial, Kohali, Lehri, Nagial, Pail Bane Khan, Phulrey Sydan, Pind Matay Khan and Sohawa and four towns.

4.1.2 Types and Number of Available Health Facilities
There are 12 Basic Health Units (BHU) nearby in Adrana, Jandala, Nagial, Gurah Uttam Singh, Kohali, Phulray Syedian, Surgdhan, Dewan-e-Hazoori, Pail Mirza, Karounta, Panchor and Banth. There is 1 Tehsil Headquarter (THQ) in Sohawa, 1 RHC in Domeli, 4 GRDs and 4 Rural Dispensaries. However, eye care services are available in only 3 facilities as will be seen below.

4.1.3 Status of Education
Literacy rate of District Jehlum where Tehsil Sohawa is located is approximately 58%1. The majority of people have either completed secondary school or matriculated.

4.1.4 Livelihood Means
The majority of people serve in the Armed Forces. A large number of people of Sohawa are settled in foreign countries particularly Western Europe and Middle East. Another major source of livelihood of the people is agriculture.

4.2 Types and Number of Available Facilities for Eye Care in Sohawa
There are only two shops offering screening services in Sohawa namely, G. S. Gillani Optical Services and Masood Gillani Optical Services. There is a THQ Hospital in Sohawa but the post of Eye Specialist has been lying vacant. There are no private hospitals offering eye care facilities in Sohawa. Findings of the KAP survey revealed that most respondents expressed a preference for private facilities to be opened in Sohawa.

Another eye care service provider Chouhdri Nisar Medical Complex arranges a weekly camp offering free eye care services but these camps were reported to be irregular. Recently, LRBT – an NGO based in Mandra has started organizing two eye screening camps every week. Furthermore there are no NGO run hospitals in Sohawa. However, LRBT has established a hospital offering free eye care services ranging from refraction to advanced surgery in Mandra which is 36 km from Sohawa.

Amongst the competitors of the E&V centre will, then, be the two shops and the THQ Hospital. There will also be some competition from the eye care services being provided by the eye camps. A more in-depth profile and analysis of the three has been given in the following sections including the location, type of services and their pricing, outreach and quality of services being offered under each facility.

1 Reference: http://www.pndpunjab.gov.pk/pnd/1/education/e8.htm
Masood Gillani Optical Services is located in the heart of the main bazaar of Sohawa near G.T. Road, visible and easily accessibile. However, despite the centrality of the location, the average outreach of the shop is roughly 15 customers per day. The shop is very small and congested with only manual screening services available which were being provided for free.

The shop is offering a range of E&V products and services such as frames along with glasses cutting and dispensation (fitting), sunglasses and prescription and contact lenses if ordered in advance by the customers. However, it should be noted that the range of products available at the shop is minimal and not enough to satisfy the needs of the customers in Sohawa.

Spectacles with frames were being sold at a price falling in the range of Rs. 300 to Rs. 1,200. Sunglasses were also being offered at a similar price range. Coloured contact lenses were available at a price of Rs. 400 to Rs. 600 whereas prescription lenses were offered for sale at a price falling between Rs. 1,300 to Rs. 2,000.

In terms of the quality of service offered at the shop, the quality of equipment was poor and the lens cutting machine and lensometer was outdated. The hygiene condition of the shop was also quite poor. The attitude of the salesman was very warm and welcoming however, he claimed to have completed a diploma in refraction but this is uncertified.
G. S. Gillani Optical Services is also located in the heart of the main bazaar of Sohawa near G.T. Road, in direct competition with Masood Gillani Optical Services. Similarly, the average outreach of the shop is roughly 15 customers per day. The shop is medium-sized offering both auto-refraction manual screening services available at a cost of Rs. 50.

The shop is offering a range of E&V products and services such as frames along with glasses cutting and dispensation (fitting), sunglasses and prescription and contact lenses if ordered in advance by the customers. A greater range of products were available at this shop as compared to the previous shop but it remains that these two shops alone cannot cater to the entire population in Sohawa. The shop also had a referral system with THQ Hospital in Sohawa and LRBT Mandra.

The prices were similar to those in the other shop with spectacles with frames and sunglasses being sold at a range of Rs. 300 to Rs. 1,200, coloured contact lenses at a price of Rs. 400 to Rs. 600 and prescription lenses at a price falling between Rs. 1,300 to Rs. 2,000. The shop also had a small setup of homeopathic medicine in a corner.

In terms of the quality of service offered at the shop, the quality of equipment was good with the new auto-refraction machine. The lens cutting machine and lensometer were also in acceptable condition. The hygiene condition of the shop, however, was quite poor. The attitude of the health personnel was positive.
4.2.3 THQ Sohawa

The THQ Hospital Sohawa with a facility of medical checkup for eye diseases, eye screening or refraction services, eye surgery, blood pressure testing and diabetes testing services similar to those that will be offered in the vision centre. However, the hospital currently does not have any eye specialist. The post will be filled soon as the Health Department Lahore has recently issued an order for an eye specialist in the hospital. While the THQ hospital provides services free of charge, demand for a good quality E&V private facility exists.

It should also be noted that prescription spectacles, contact lenses, sunglasses and lens cutting and dispensation are all services not offered at the hospital. Furthermore, the quality of the equipment being used is good but has not been well-maintained. The hygiene condition of the hospital was not up to the mark. The attitude of the health personnel gave off the impression personnel that were being compelled into working. However, their demeanour varied greatly with people of high social status or political strength who were given extra ordinary care.

4.3 Availability of Optical Lab in Tehsil Sohawa

No proper optical lab is established in Sohawa. While the shops in Sohawa did offer services for cutting and fixing of glass, the equipment and type of material used is outdated and below standard.

4.4 Types and Number of Facilities for Eye Care in Neighbouring Areas

4.4.1 Mandra

Mandra is a town in Tehsil Gujjar Khan which is 36 km away from Sohawa. There are a total of three spectacle shops in Mandra of which two offer screening facilities. The two shops with screening facilities offer a range of spectacles which are priced between Rs. 200 to Rs. 350. The spectacle shop without screening facilities offers spectacles at a price range of Rs.
150 to Rs. 350. Sunglasses are also available at these shops for Rs. 40 to Rs. 100. There is one private hospital in Mandra as well.

LRBT has established a hospital in Mandra on main G. T. Road. It is important to note that the quality of services provided at the hospital is very good and it is a very large establishment able to cater to a large segment of the population. However, the hospital does not offer spectacles, contact lenses and prescription lenses and simply refers the patients to the nearby shops in the area. Therefore, the facility does not usurp the entire market share in terms of the sale of spectacles, contact lenses and sunglasses.

### 4.4.2 Gujjar Khan

Gujjar Khan is the nearest city from Sohawa at a distance of 22 km. There are three spectacle shops in the city all of which offer screening facilities. Sight screening at these shops is done for Rs. 50 to Rs. 100 and sight glasses are available at a price falling between Rs. 250 to Rs. 2,500. The shops also offer contact lenses which are available at a price falling between Rs. 550 to Rs. 1,200. No sunglasses are available at these shops.

There is a THQ Hospital in Gujjar Khan offering eye care facilities with one medical officer, one optometrist and one trainee. There are also three private clinics for eye care in Gujjar Khan run by an ophthalmologist, eye specialist and optometrist, respectively. While the government hospital provides eye care at very less charges, the hygienic standard in the hospital is not well maintained. On the other hand, most of the private clinics are in good hygienic condition.

### 4.4.3 Dina

Dina is a town in District Jhelum which is located 26 km away from Sohawa. There are seven shops in Dina offering manual eye screening facilities. Sight screening at these shops is done for free and sight glasses are available at a price falling between Rs. 100 to Rs. 350. The shops also offer contact lenses which are available at a price falling between Rs. 900 to Rs. 1,100. Sunglasses are also available at these shops at prices falling between Rs. 100 and Rs. 550.

There is an Iqbal Eye Block in the Rural Health Centre in Dina which is funded by Patients Welfare Society. Patients Welfare trust Denmark and Dina Pakistan built block. Free eye camps are arranged in RHC Dina once a week. Dr. Mukhtar Ahmed, an ophthalmologist from DHQ Hospital Jhelum, visits the weekly camp on Saturday and checks OPD patients. Field observations show that the RHC was well maintained and was in good hygienic condition.

There are also three private clinics for eye care in Gujjar Khan run by an ophthalmologist, eye specialist and optometrist, respectively. While the government hospital provides eye care at very less charges, the hygienic standard in the hospital is not well maintained. On the other hand, most of the private clinics are in good hygienic condition.

### 4.5 Optical Lab and Location of Current Suppliers of Refractive Devices

There is no separate optical lab in neighbouring areas as well. Suppliers of refractive devices are in Lahore and Karachi.

### 4.6 Possible Competitors of CHIP/ICEE’s Established Vision Centre
The THQ Hospital in Sohawa will be providing eye care facilities for free to the patients therefore, it could be anticipated that demand for services such as screening and diabetes checkup might be low. However, the hospital will not be selling spectacles and prescription lenses and it is unlikely that demands of the community are being met with the existing two optical shops in Sohawa.

### 4.7 Possible Risks

There are some risks associated with the establishment and running of vision centre in Sohawa. The THQ offers eye screening and blood pressure and diabetes monitoring services for free along with the medical eye camps that are organized by LRBT weekly. However, the vision centre will be offering spectacles, prescription lenses and sunglasses which are not being adequately provided by the other two shops. Furthermore, a rigorous marketing and awareness raising is required to attract people towards the vision centre and achieve its main aim that is, to eradicate permanent low vision and blindness. The pricing of existing services and products is either free or very low therefore there is a possible risk that besides the good quality of the services and products of CHIP-ICEE owned vision center if its prices would be relatively higher from existing ones, the customers would take some time to get convinced of using services of upcoming vision center.

### 4.8 Expectations of Communal Groups about Eye Care

4.8.1 People expect a hygienic environment in the centre. They also expect positive attitude from the supportive staff as the main reason for dissatisfaction with the few free hospital facilities was the humiliating attitude of the health personnel.

4.8.2 The pricing of products and services are expected to be moderate and in very close range of the market rates. Furthermore, due to the THQ Hospital and LRBT Hospital in Mandra, they expect some complimentary services as well.

4.8.3 The close proximity between the people and the vision centre will be advantageous as the people in the KAP survey proposed for eye care facilities to be made more accessible.
5 Key Findings in Sanghoi

5.1 Demographics of Sanghoi
The total population of the Sanghoi is 223,984.

5.1.1 Number of Union Councils and Villages
There are eleven union councils in Sanghoi namely Nara, Naka Khurad, Dara Pur, Chotala, Sanghoi, Kotla Faqeer, Monan, Chak Jamal, Kala Gujran, Chak Khasa, Bokan containing a number of villages. The villages near Sanghoi are Noor Pur Bhagain, Toor, Kahan and Daryalla which can also serve as potential markets for the vision centre.

5.1.2 Types and Number of Available Health Facilities
There are 9 Basic Health Units (BHU) in Tehsil Sanghoi, 1 Tehsil Headquarter (THQ) in Sohawa, 1 District Headquarter (DHQ) in Jhelum, 1 Rural Health Clinic (RHC) and 1 GRD. However, eye care facilities are available in only 1 private facility as will be seen below.

5.1.3 Status of Education (literacy level, qualification of most of the people)
Approximately, 65% of the total population is illiterate. Of the literate population 10% have studied till primary level, 10% have studied till secondary level, 5% have matriculates and 10% have studied till intermediate level.

5.1.4 Livelihood Means
People in Sanghoi depend largely on agriculture and small businesses for livelihood.