



VRSI Market Research

Final Report

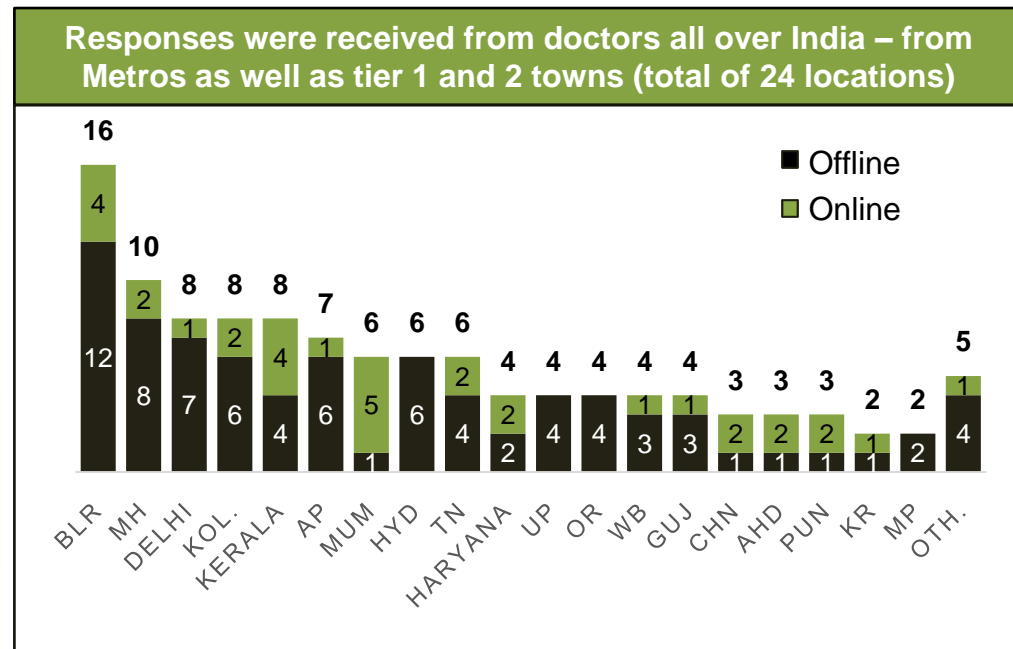
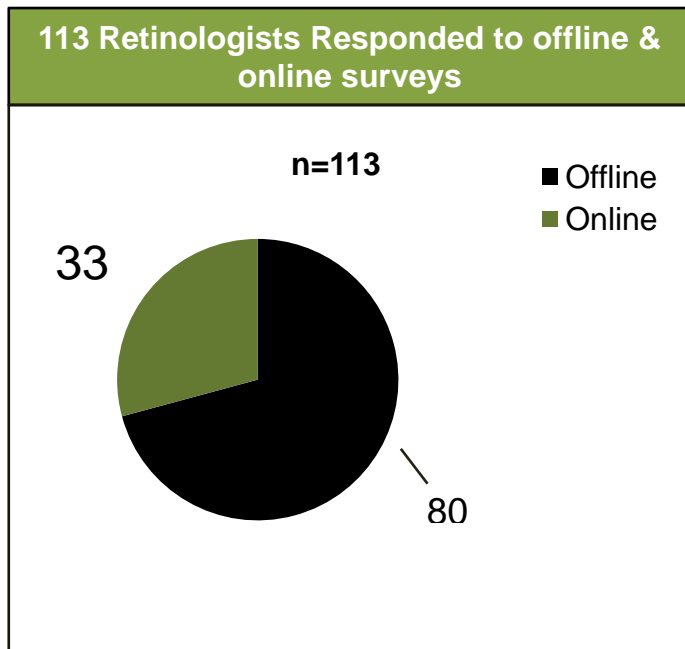
May 2017



Research Objective and Methodology

Research Objective

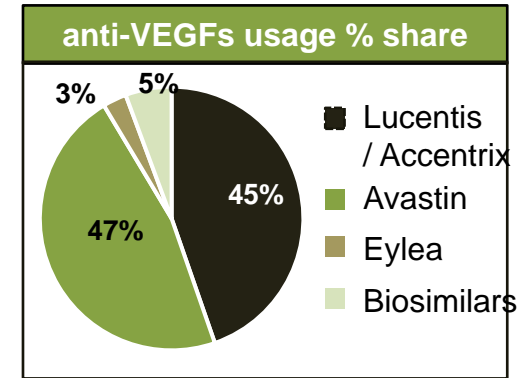
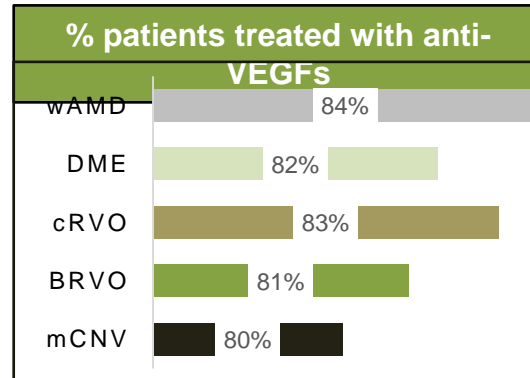
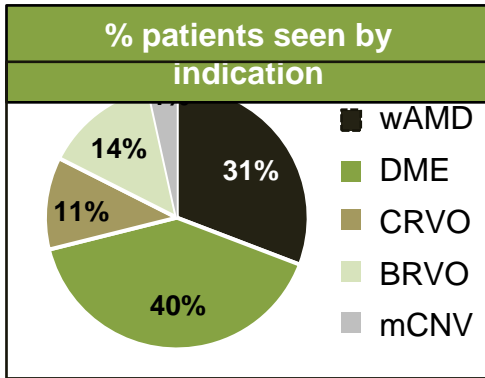
To understand the treatment protocols and preferences for anti-VEGFs in different Retinal disorders (wAMD, DME, cRVO, bRVO and mCNV), market dynamics including the procedure cost with drug cost and perspective on insurance coverage for anti-VEGFs treatment



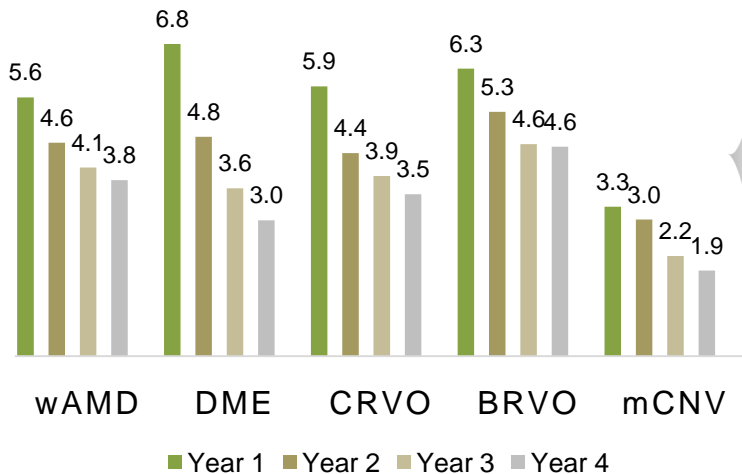
Key Limitation of the Study

Though the study covers 113 doctors who see a total of 97,119 patients, the numbers provided by doctors are on 'as reported' basis and not drawn from the practice records.

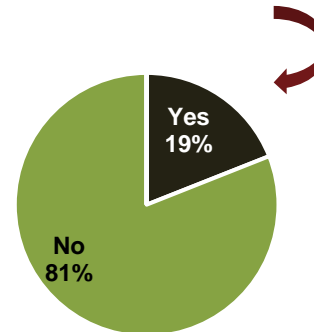
Executive Summary – Current usage of anti-VEGFs



Avg number of injections / patient y-o-y

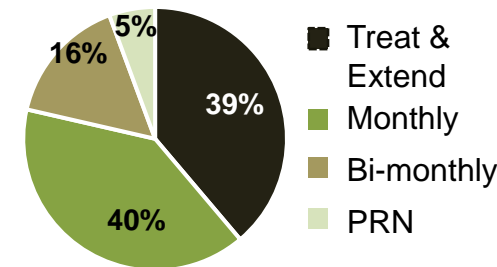


Treatment guideline different for different anti-VEGF drugs



~80% physicians don't use different guidelines for different anti-VEGFs

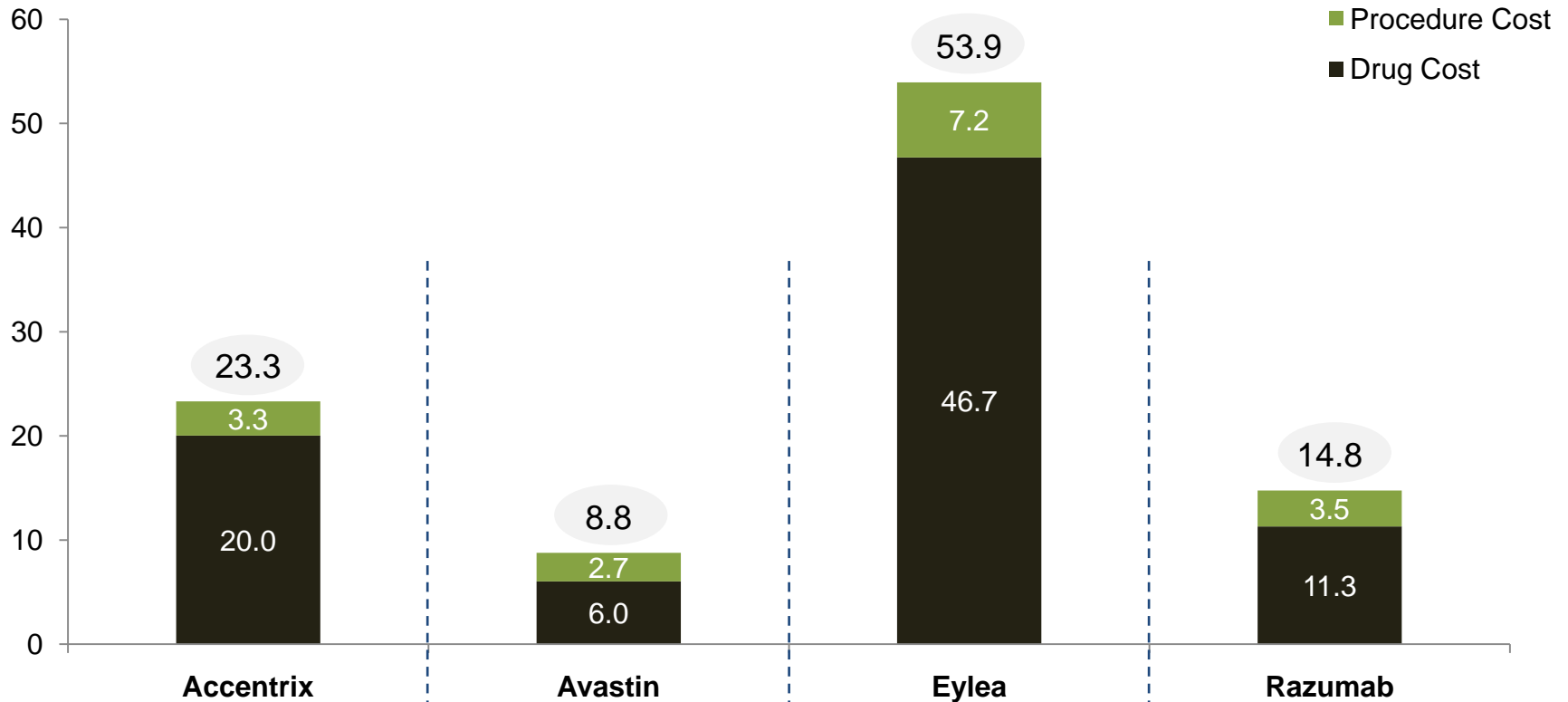
Guidelines followed for treatment



~80% physicians follow either "Monthly" or "Treat & Extend" guidelines



Total cost to patients, with different anti-VEGFs (INR' 000)



Procedure Cost

90 th %ile	↕	5,000	5,600	7,500	5,000
10 th %ile	↕	2,000	1,000	2,000	1,000

Drug Cost

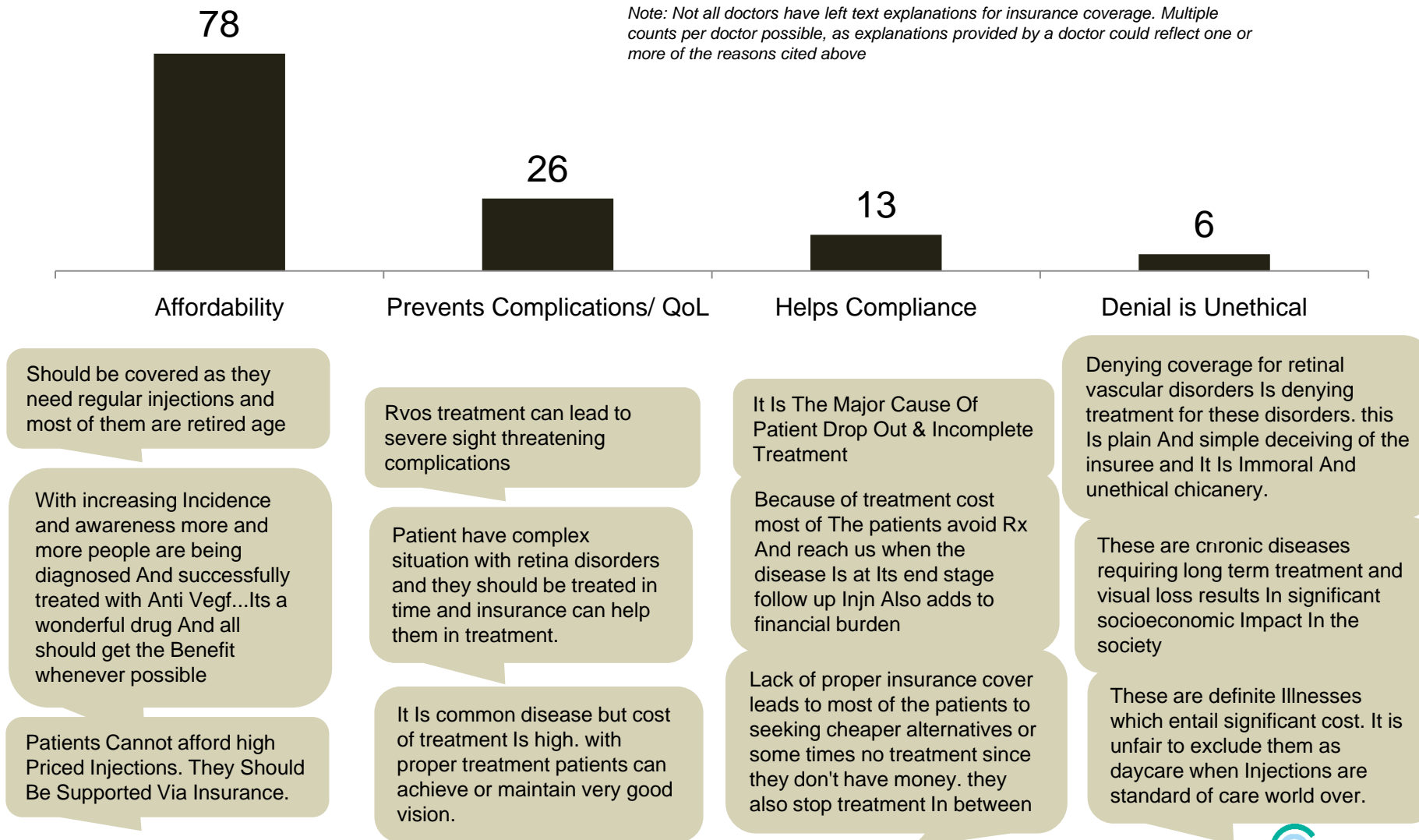
90 th %ile	↕	22,000	8,000	55,000	15,000
10 th %ile	↕	18,000	3,000	39,000	9,500

Why Do You Believe That Retinal Vascular Disorders Should Be Brought Under Insurance Coverage

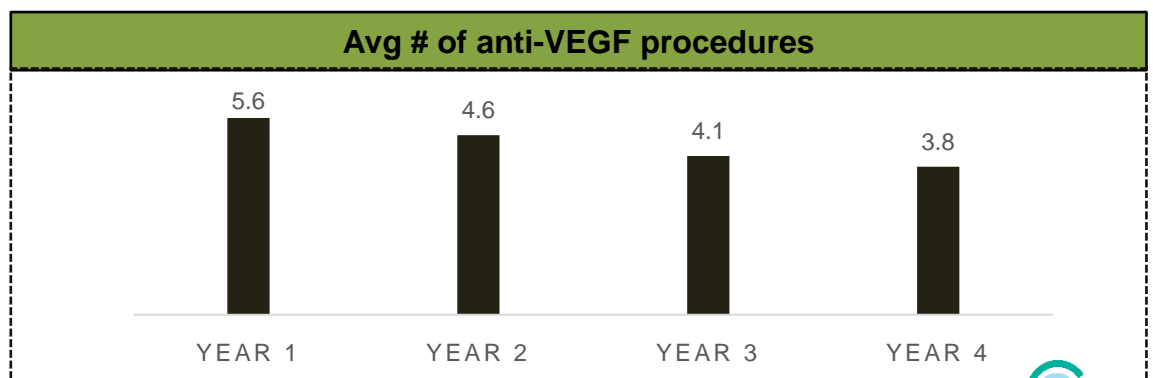
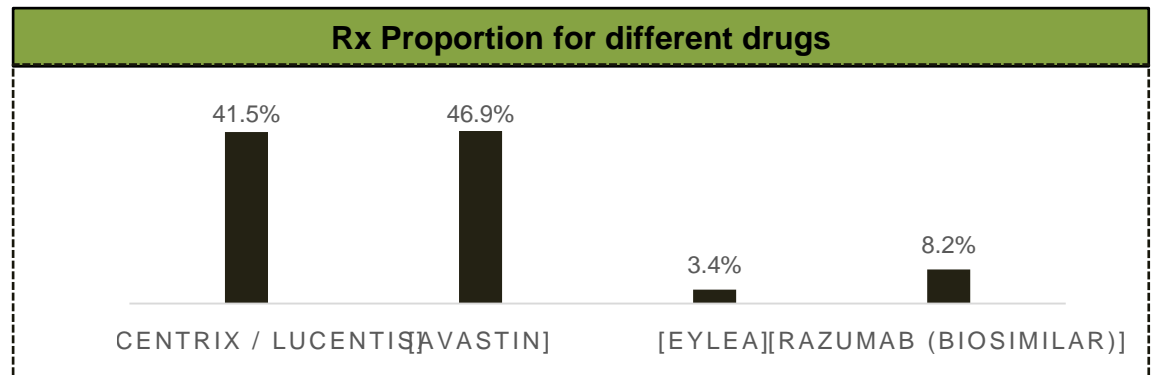
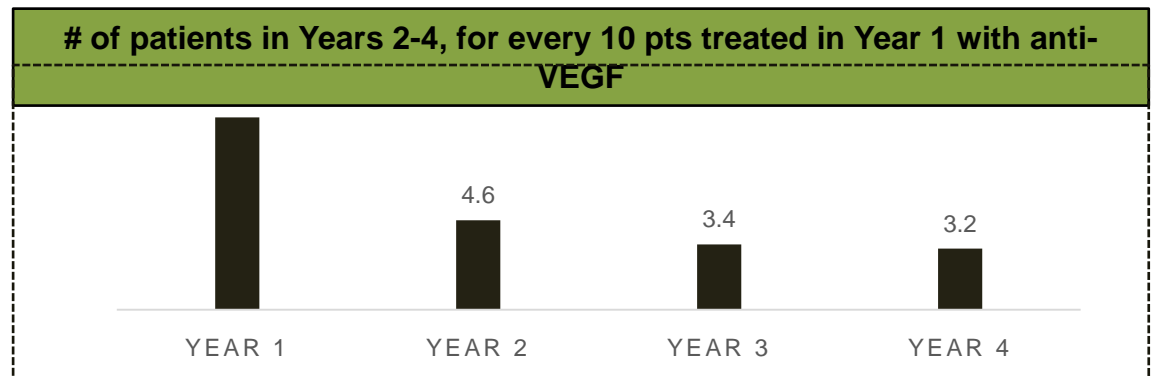
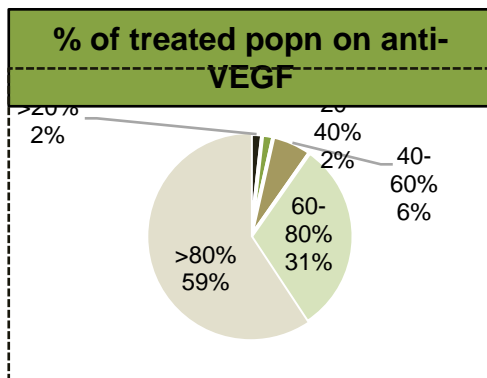
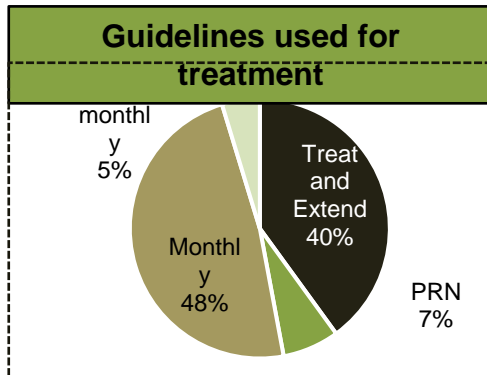
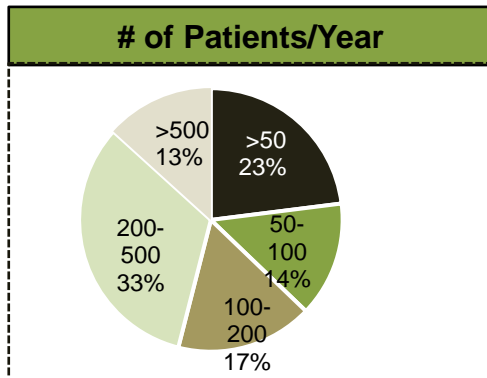


Vitreo Retina Society-India

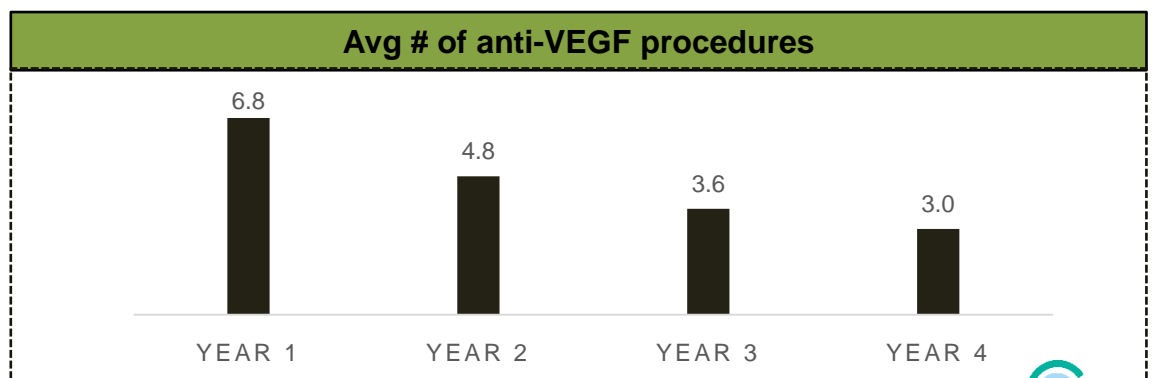
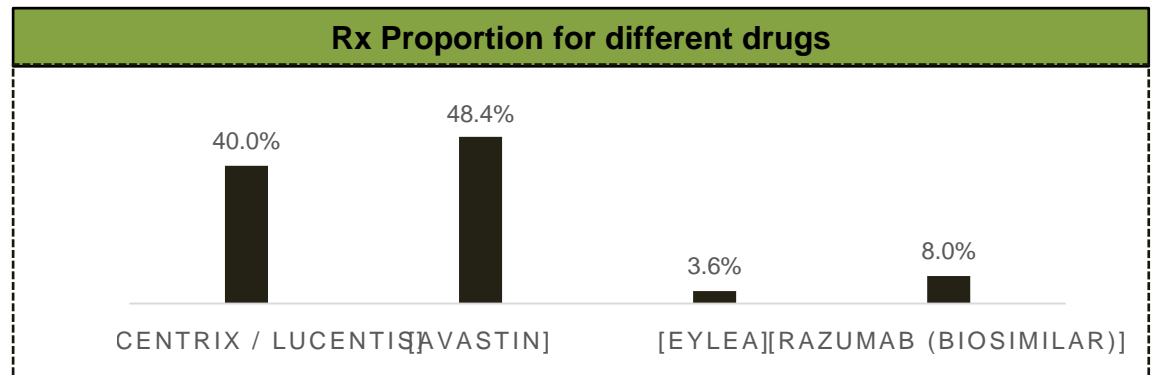
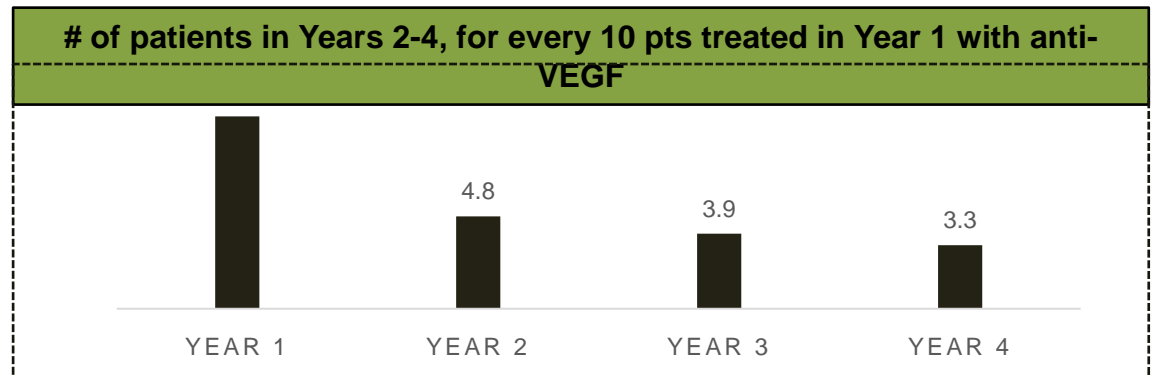
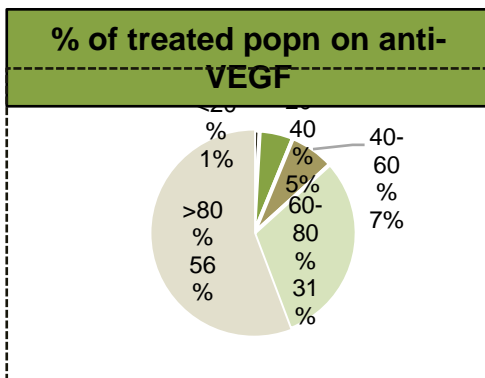
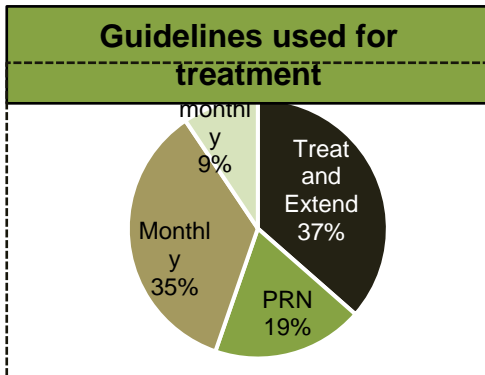
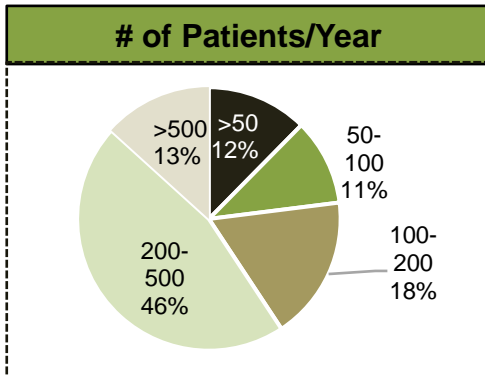
Note: Not all doctors have left text explanations for insurance coverage. Multiple counts per doctor possible, as explanations provided by a doctor could reflect one or more of the reasons cited above



Wet AMD Snapshot

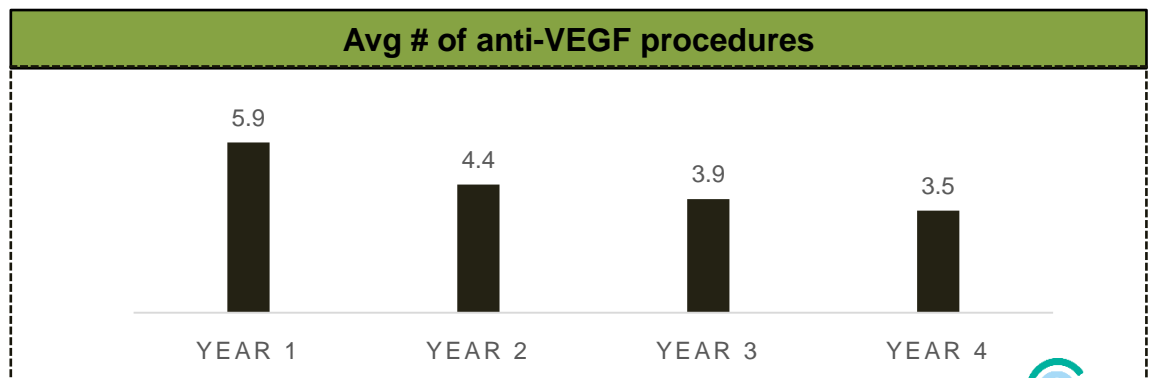
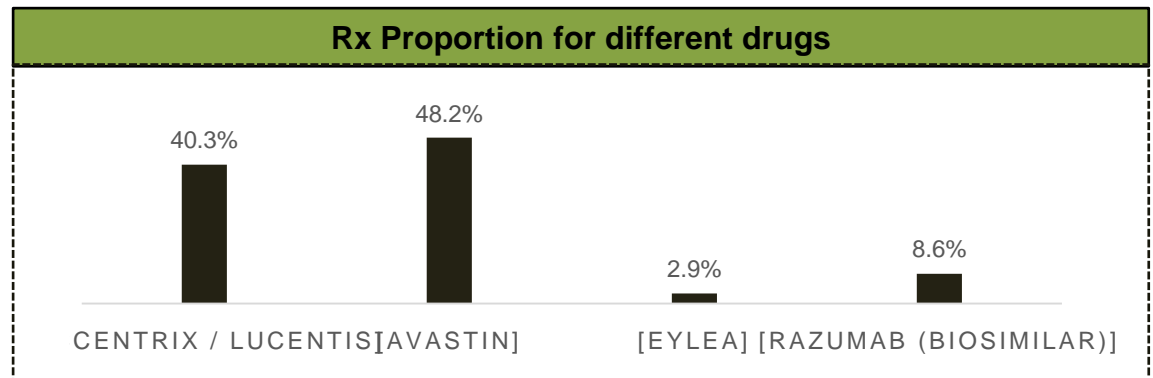
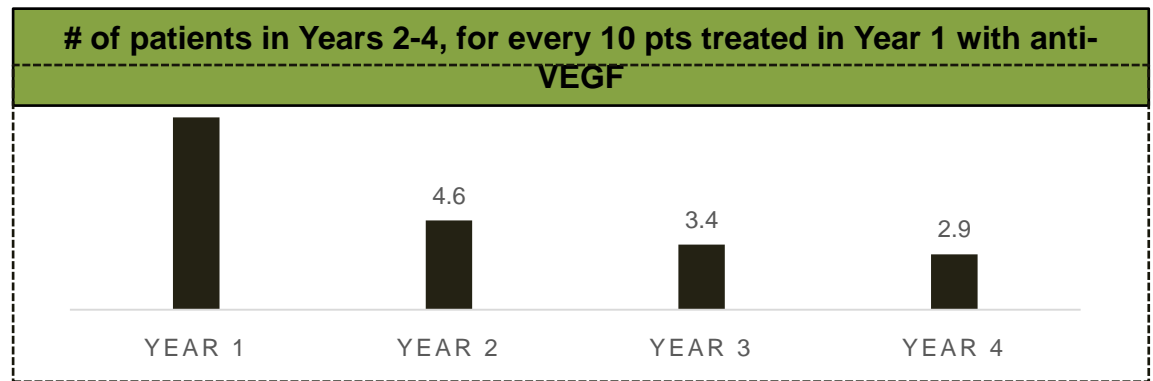
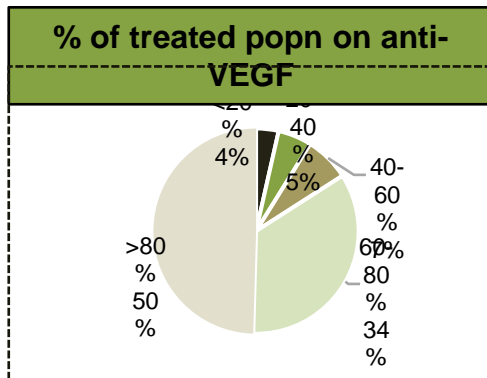
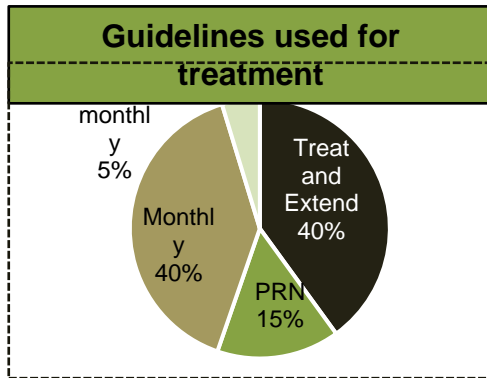
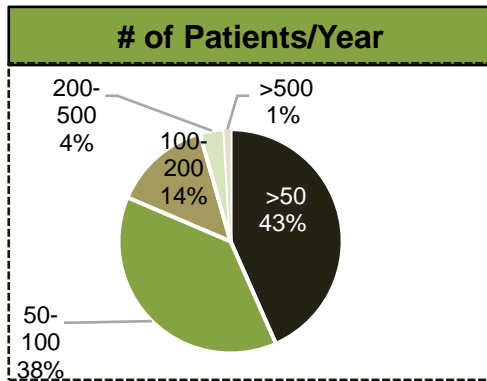


DME Snapshot



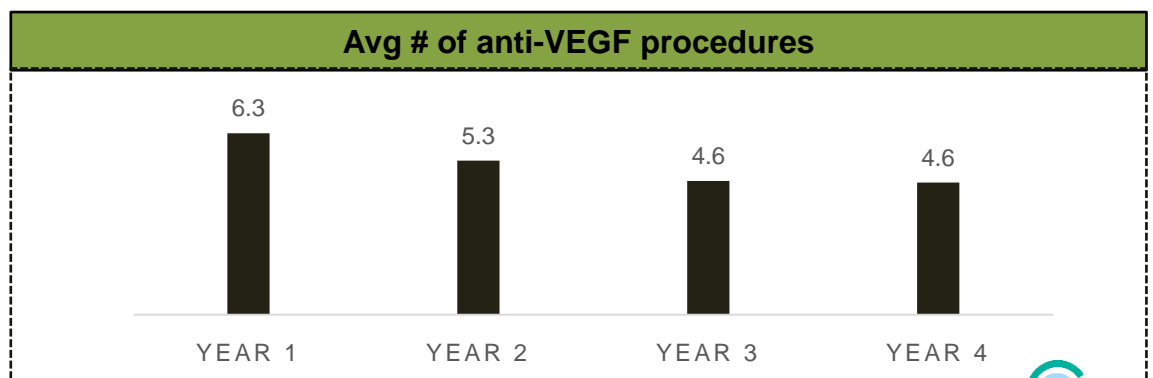
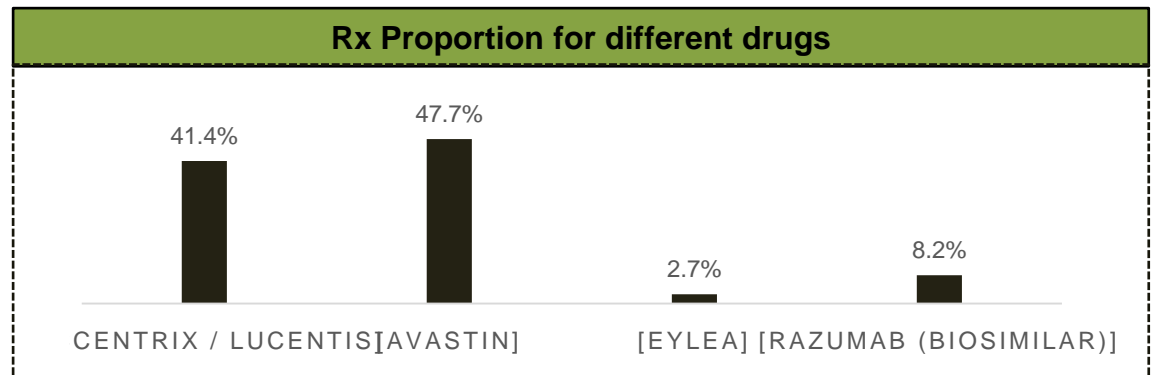
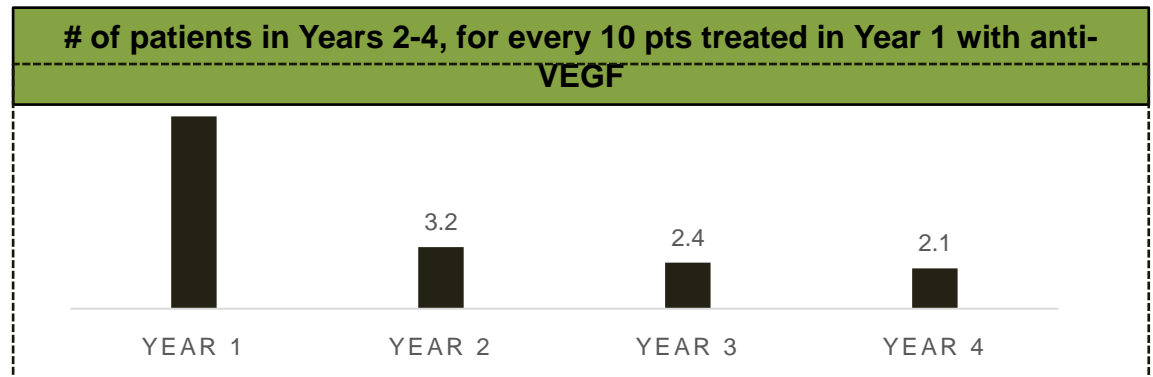
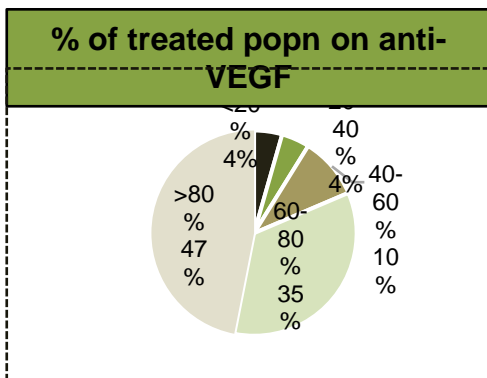
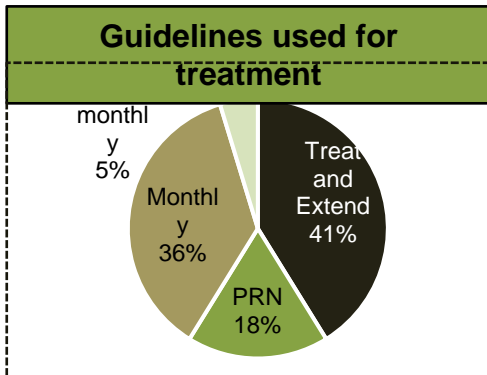
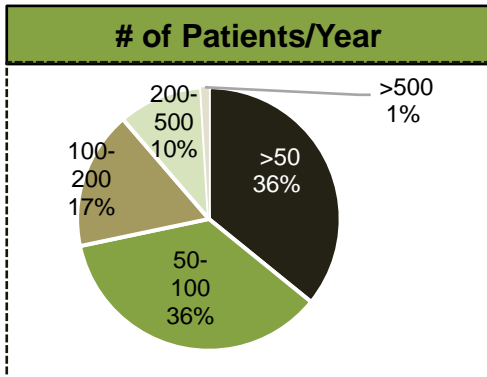


cRVO Snapshot





BRVO Snapshot



mCNV Snapshot

