



**INDEXLAB**  
Market Research  
Report

# DME Market Understanding

January 2024

Prepared for



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# Executive Summary

## Research Objective

- We conducted a study to gain a better understanding of the DME market in detail to shape the marketing and communication strategies.
- In this study, we assessed the treatment approaches of Retina specialists towards DME and gauged physicians' views on new products and forms. We also considered SUT regulations and their impact on treatment preferences.

## Content

- This survey covers the following topics to meet the research objectives:
  - Patient load
  - Treatment regimens
  - Brand awareness
  - Prescription habits
  - Important factors on product choices
  - Company activities
- The report includes the findings by total and institution breakdowns.

## Approach

### Quantitative Interviews

- Interviewing technique: Quantitative study via **F2F interviews**
- Length of interview: **25 minutes**
- Sample size & profile: **100 retina specialties.**
- Fieldwork location: **11 cities**
- Fieldwork period: **01-Oct / 15-Dec**

## Sample

### Sample Size

- **100 retina specialties**

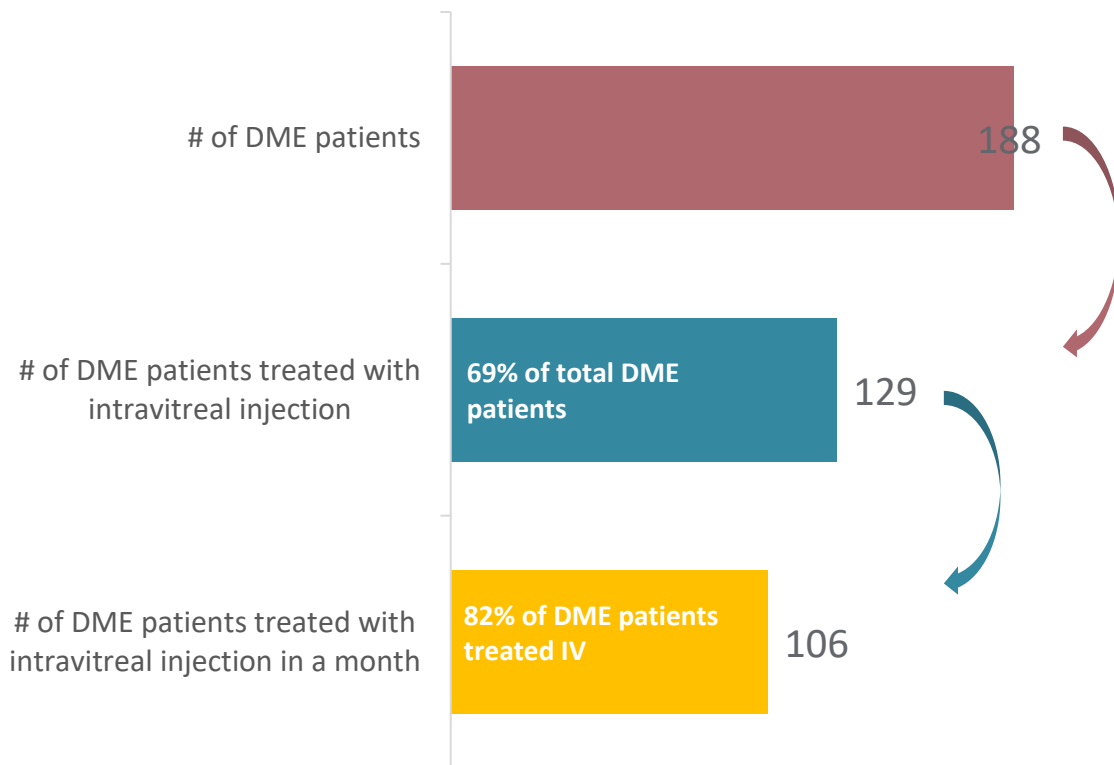
# RESEARCH FINDINGS

Base: 100 retina specialties



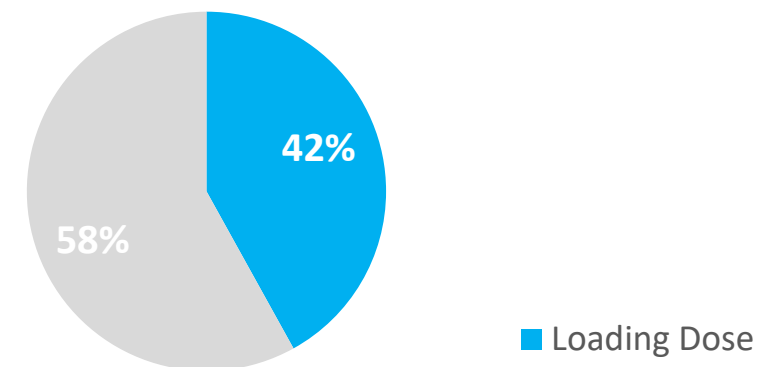
## Patient Load

On average, a retina specialist sees 188 DME patients, 129 of whom are treated with intravitreal injections. They administer intravitreal injections to 82% of these patients within a month.



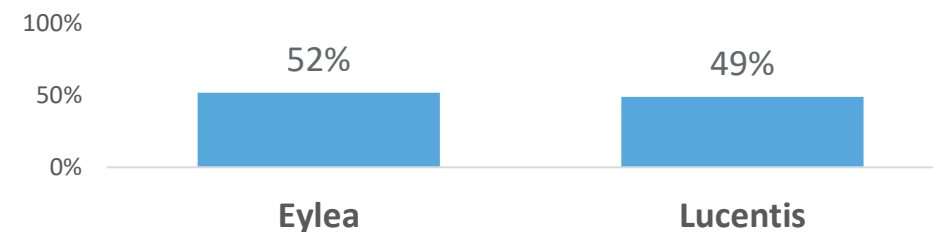
## Patient Load

On average, 42% of the DME patients are receiving initial loading doses. The loading dose rate is lower in University Hospitals.



## Re-administering the initial dose

Retina specialists re-administer the loading dose with these injections to around half of the DME patients who switch to Eylea and Lucentis after three loading doses with Altuzan / Avastin.



# RESEARCH FINDINGS

Base: 100 retina specialties



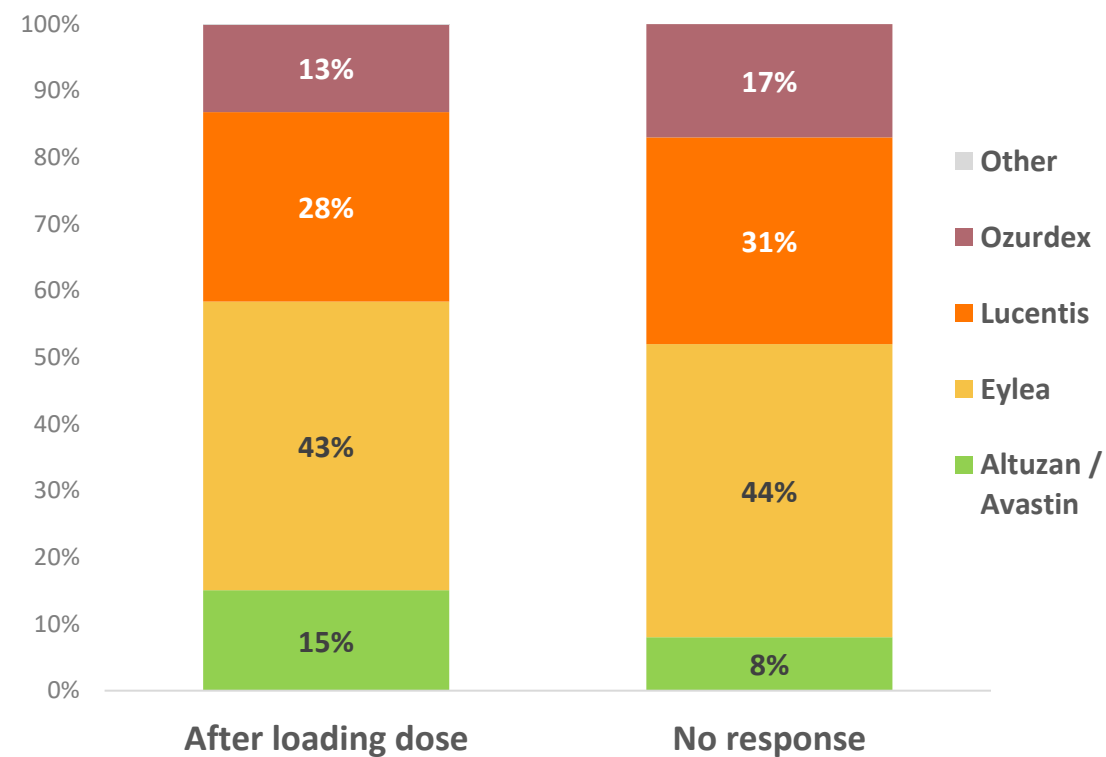
After the 3rd loading dose, the retina specialists treat 43% of the DME patients with EYLEA. Lucentis' share is around 28%.

After administering three loading doses, 40% of DME patients showed no response or an inadequate response. Among these, retina specialists treat 44% with EYLEA. Meanwhile, Lucentis is the preferred treatment for 31% of these patients.

## % of DME Patients with Insufficient or No Response to DME Treatment

# 40%

## RX share after loading dose & no response patients



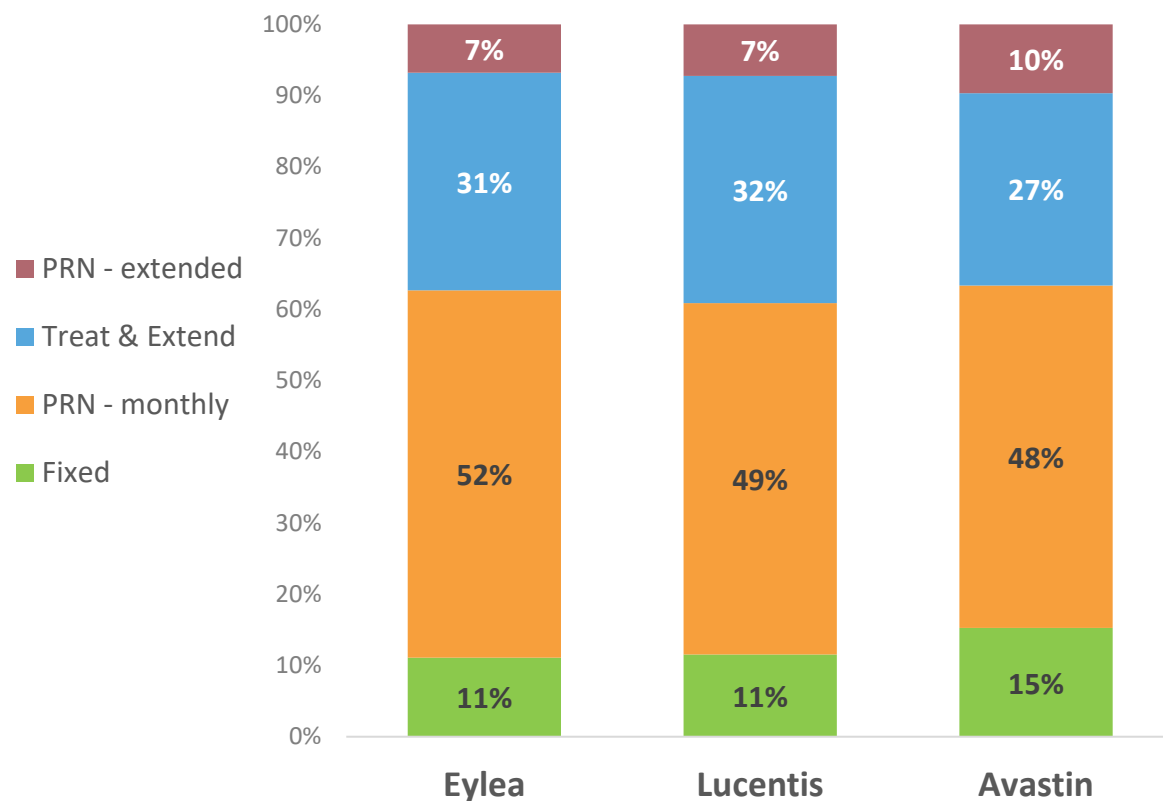
# RESEARCH FINDINGS

Base: 100 retina specialties



## Dose Regimens

The retina specialists apply the PRN-monthly dosing regimen to half of the DME patients and treat around 30% of the DME patients with the T&E dosing regimen.



## Average Number of Injections

The number of injections has decreased over the years, yet there are no significant differences in the number of injections based on dose regimens.

	Fixed & TE		
	EYLEA	LUCENTIS	ALTUZAN/ AVASTIN
Base	84	80	47
1st year	5.5	5.4	6.1
2nd year	3.9	4.0	3.7
3rd year	2.8	2.8	2.6

	PRN monthly/extended		
	EYLEA	LUCENTIS	ALTUZAN/ AVASTIN
Base		47	47
1st year	5.4	5.3	5.8
2nd year	3.7	3.7	4.1
3rd year	2.7	2.7	3.2



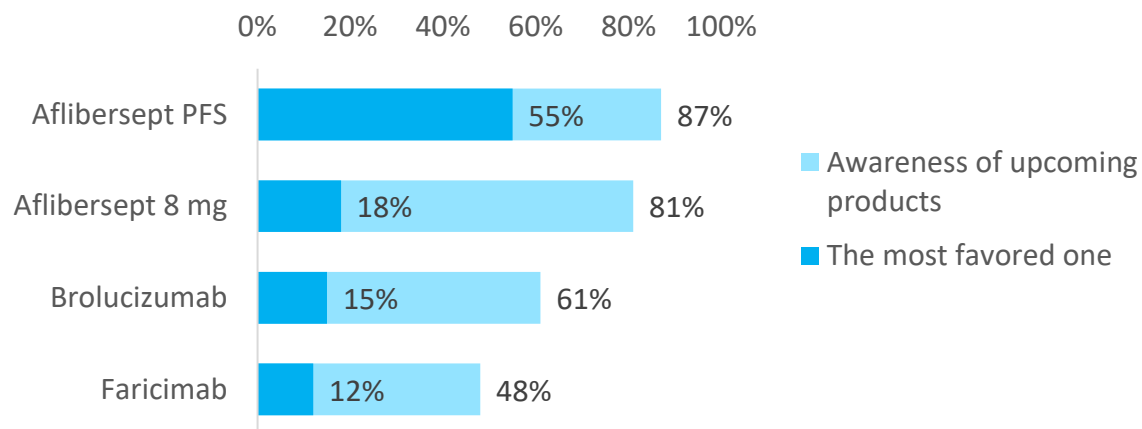
# RESEARCH FINDINGS

Base: 100 retina specialties



## Awareness of upcoming products

More than four-fifths of physicians are aware that "Aflibercept PFS form and 8 mg" are upcoming. The PFS form of Aflibercept is the most preferred.



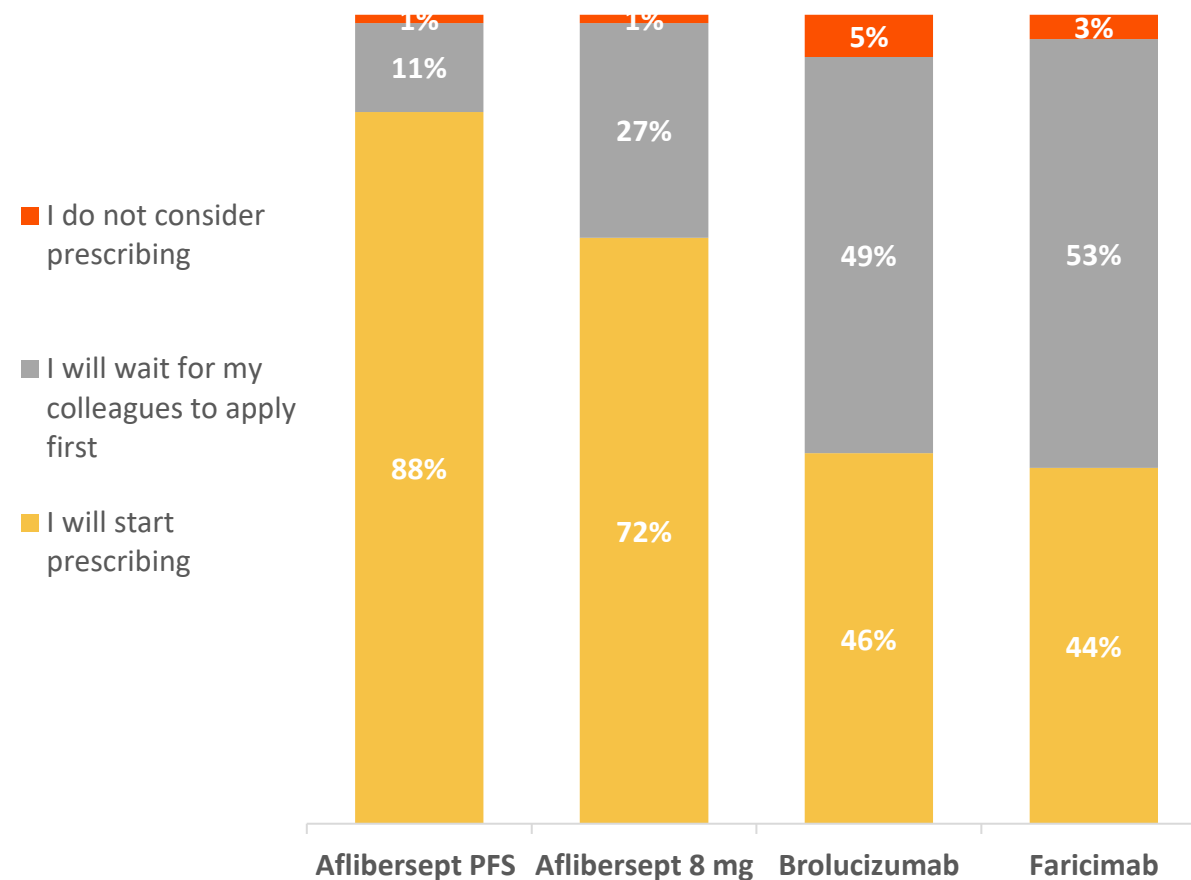
## Switching rate from Lucentis PFS form to Eylea PFS form

if Eylea was available in PFS form, Retina specialists would likely prescribe it to 63% of DME patients over the PFS form of Lucentis.

# 63%

## Attitude Towards New Therapies

Retina specialists would likely to start prescribing Aflibercept forms (PFS, 8 mg). On the other hand, they tend to wait to see their colleagues begin prescribing Brolucizumab and Faricimab.



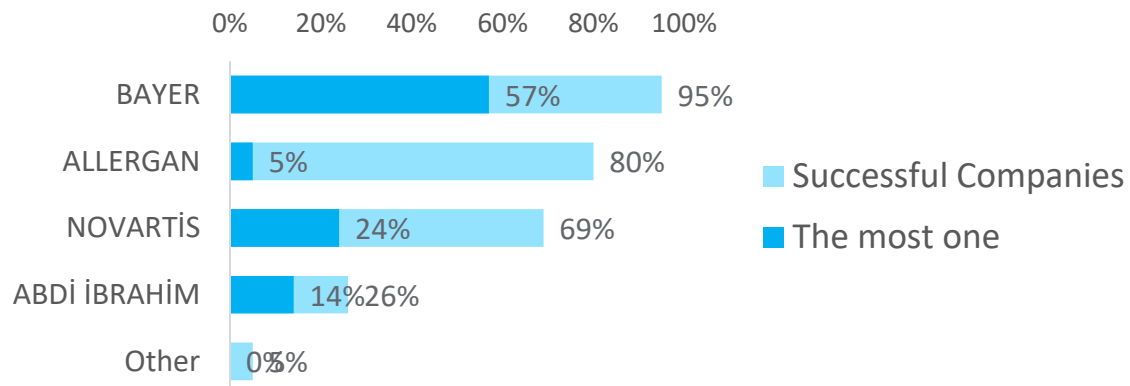
# RESEARCH FINDINGS

Base: 100 retina specialties



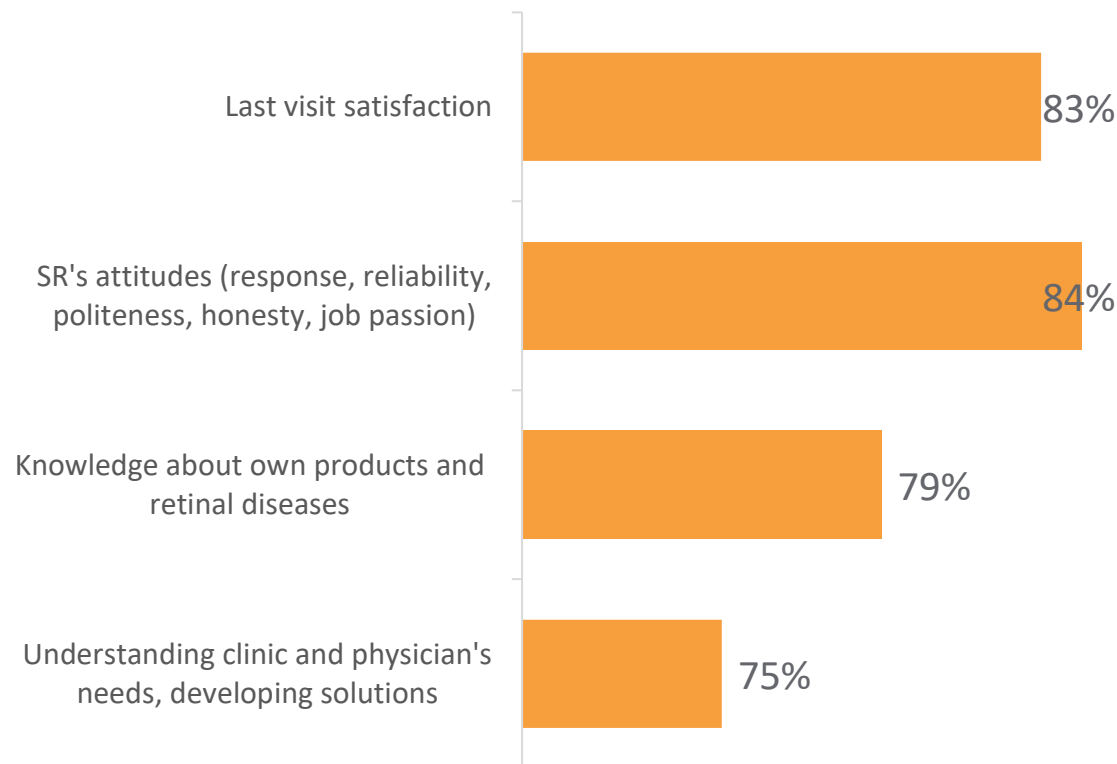
## Successful Companies

95% of retina specialists view Bayer as a successful company, with 57% of them considering Bayer the most successful company in ophthalmology.



## Evaluation Bayer's Sales Representatives

Bayer's sales representatives seem to be more successful.



## Visit coverage

Nearly all retina specialists recall either a F2F visit or online e-detailing session from Bayer.

96%

## Visit Frequency

Bayer SRs make contact with retina specialists at least once every two weeks.

80%



# Research Approaches

## Research Objective

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  - Treatment regimens
  - Brand awareness
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  - Important factors on product choices
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## Sample

### Sample Size

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# Physician Profile

<u>Province</u>	# of physicians
ISTANBUL	35
ANKARA	18
IZMIR	12
ANTALYA	7
GAZIANTEP	6
SAMSUN	6
ADANA	5
KAYSERI	4
TRABZON	4
DIYARBAKIR	2
VAN	1
<b>TOTAL</b>	<b>100</b>

<u>Institution type</u>	# of physicians
T & R Hospital	39
City Hospital	23
University Hospital	38
<b>Total</b>	<b>100</b>

<u>Title</u>	# of physicians
Professor	4
Associate professor	18
Specialist	78
<b>Total</b>	<b>100</b>

## Experience

**11,4** years

## Patient load

**525,7** patients



# Detailed Findings



# DME patient load



# Patient Load

	Total 100	T&R Hospitals 39	City Hospitals 23	University Hospitals 38
<b># of patients with Retinal Diseases</b>	<b>526 patients</b>	<b>509 patients</b>	<b>826 patients</b>	<b>361 patients</b>
Wet AMD	109 patients	109 patients	135 patients	94 patients
<b>Diabetic macular edema</b>	<b>188 patients</b>	<b>179 patients</b>	<b>240 patients</b>	<b>166 patients</b>
Retinal Vein Occlusion	39 patients	43 patients	55 patients	25 patients
Myopic CNV	10 patients	12 patients	14 patients	7 patients
<b># of patients with Retinal Diseases treated with intravitreal injection</b>				
Wet AMD	80 patients	89 patients	85 patients	68 patients
<b>Diabetic macular edema</b>	<b>129 patients</b>	<b>129 patients</b>	<b>162 patients</b>	<b>108 patients</b>
<b># of Wet AMD patients treated with intravitreal injection in a month</b>	<b>64 patients</b>	<b>69 patients</b>	<b>67 patients</b>	<b>58 patients</b>
<b># of DME patients treated with intravitreal injection in a month</b>	<b>106 patients</b>	<b>92 patients</b>	<b>139 patients</b>	<b>99 patients</b>

Significantly higher than others

- S1. Tedavi uyguladığınız toplam retinaya bağlı göz hastalığı olan hasta sayısını belirtir misiniz?
- S2. Hali hazırda aşağıdaki her bir endikasyon için TOPLAM kaç hastanız olduğunuz belirtir misiniz?
- S3. Tedavi uyguladığınız retinaya bağlı göz hastalığı olan kaç hastanıza intravitreal enjeksiyon (anti-VEGF ve Steroid) tedavisi uyguladığınızı yazar mısınız?
- S4. Ortalama bir ayda Toplam kaç Yaş Tıp YBMD hastanıza intravitreal enjeksiyon (anti-VEGF) uyguluyorsunuz?
- S5. Ortalama bir ayda Toplam kaç DMÖ hastanıza intravitreal enjeksiyon (anti-VEGF) uyguluyorsunuz?

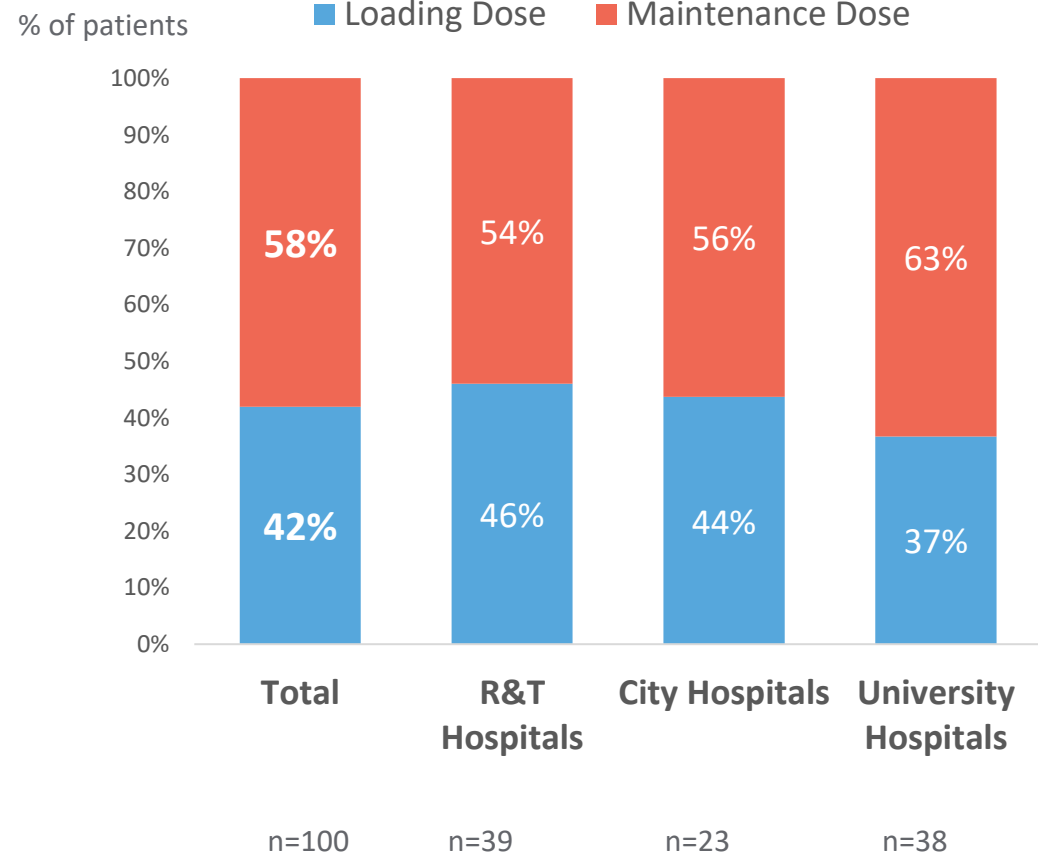
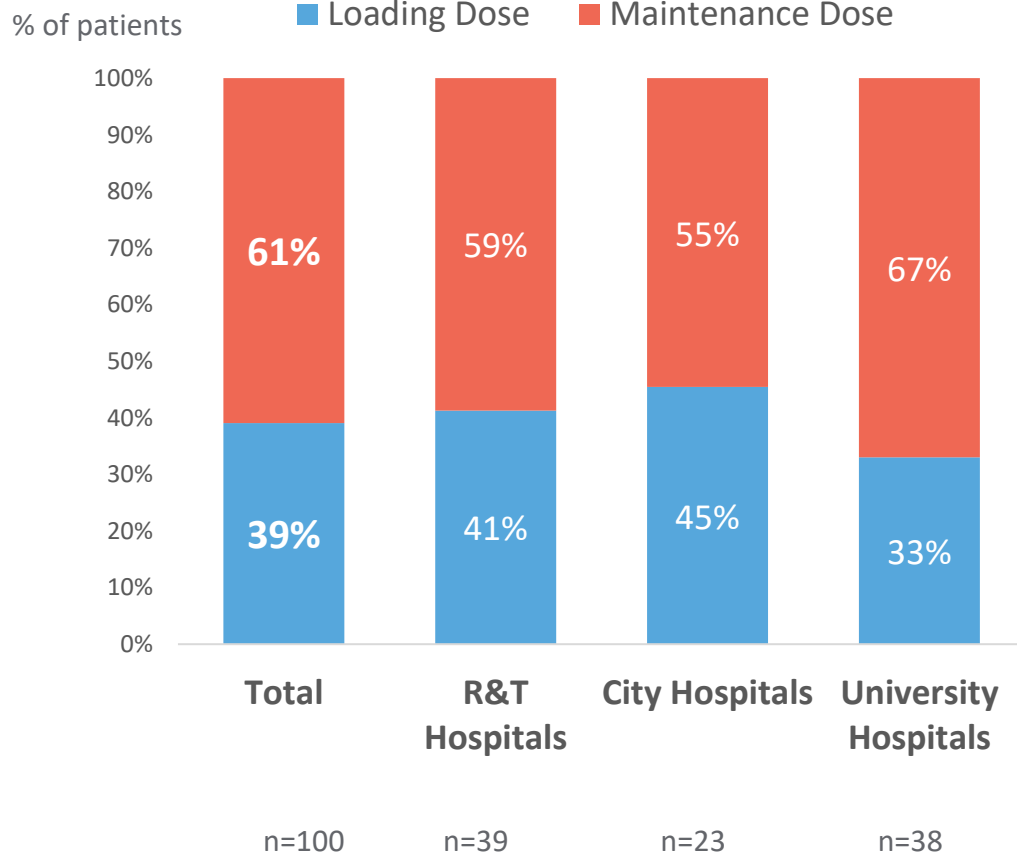
# Loading Dose / Maintenance Dose

By institution

On average, 40% of the wetAMD & DME patients are receiving initial loading doses. The loading dose rate is lower in University Hospitals.

Wet AMD

DME



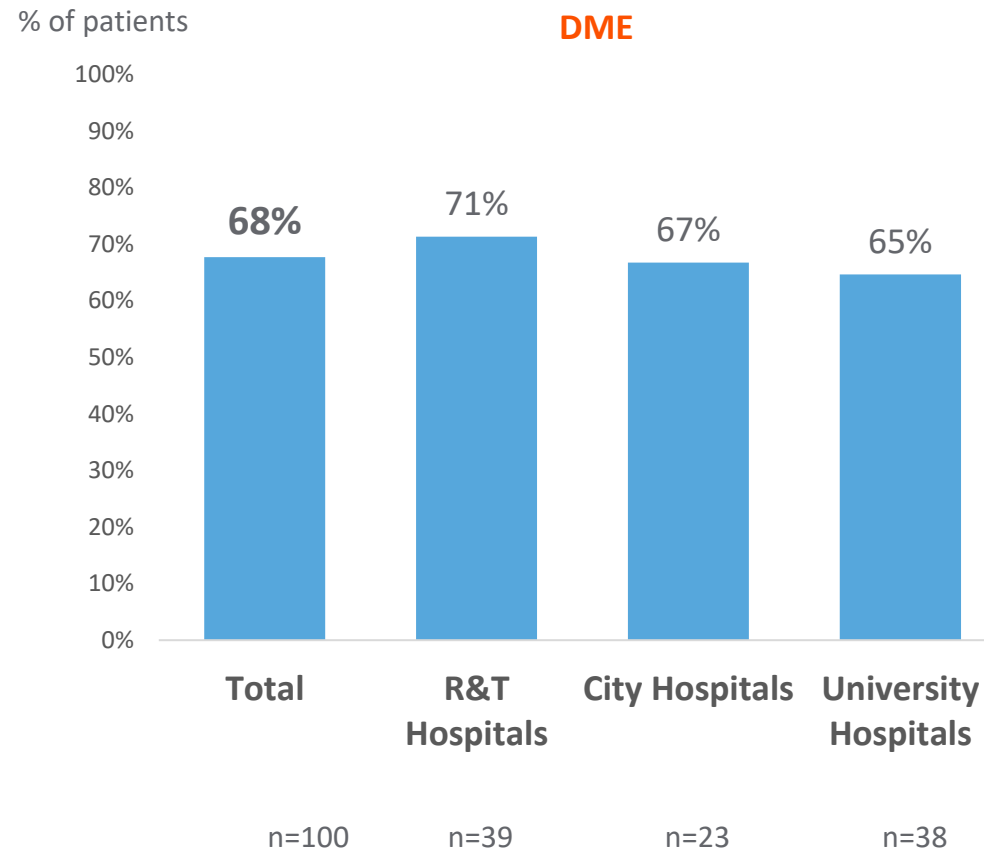
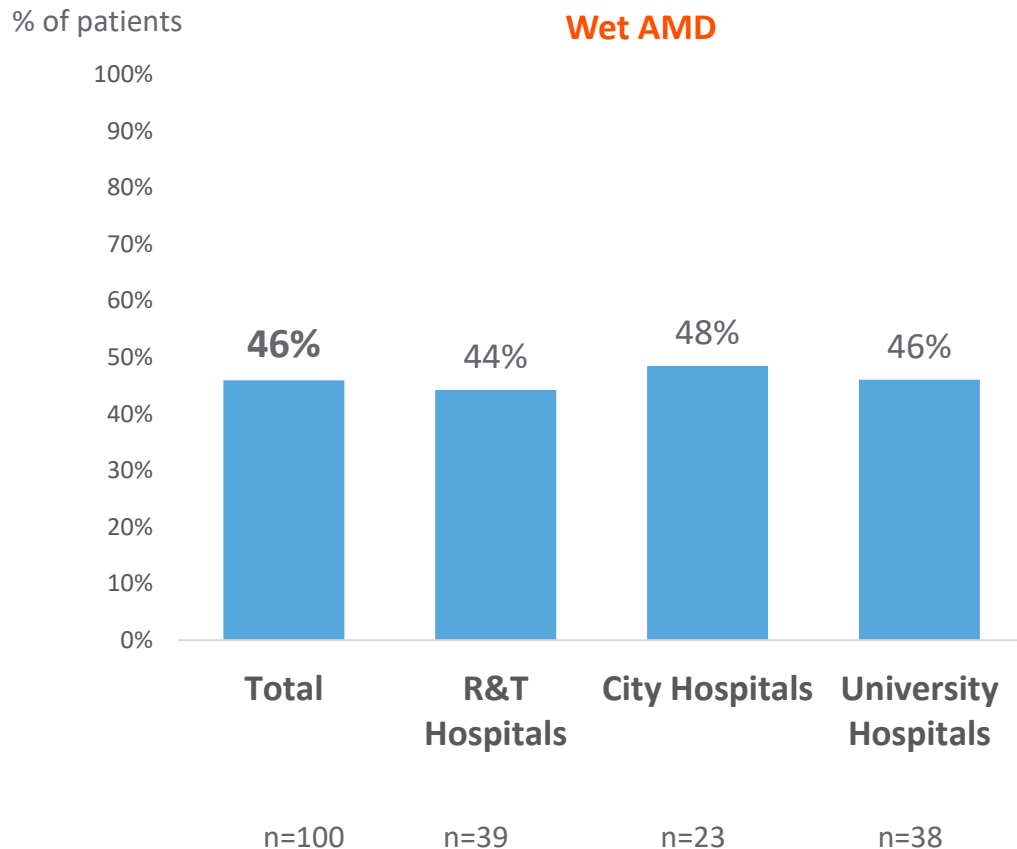
S6. Tedavi ettiğiniz DMÖ ve Yaş Tip YBMD hastalıklarının tedavisinde, intravitreal enjeksiyon (anti-VEGF) tedavisi uyguladığınız hastalarınızın yüzde kaç şu anda yükleme dozu uygulanan hasta, yüzde kaç yükleme dozu sonrası tedavisine devam edilen hastadır?

○ Significantly higher than others

# % of patients DME / Wet AMD seen in both eyes

By institution

DME tends to occur in both eyes more frequently than wet AMD. Specifically, DME is observed in both eyes for 68% of patients, as compared to wet AMD, which is seen in both eyes for 46% of patients.



S7. Intravitreal enjeksiyon (anti-VEGF) tedavisi uyguladığınız hastalarınızın yüzde kaçında her iki gözde de Yaş tip YBMD / DMÖ görülmektedir?

Significantly higher than others



# Brand Preferences

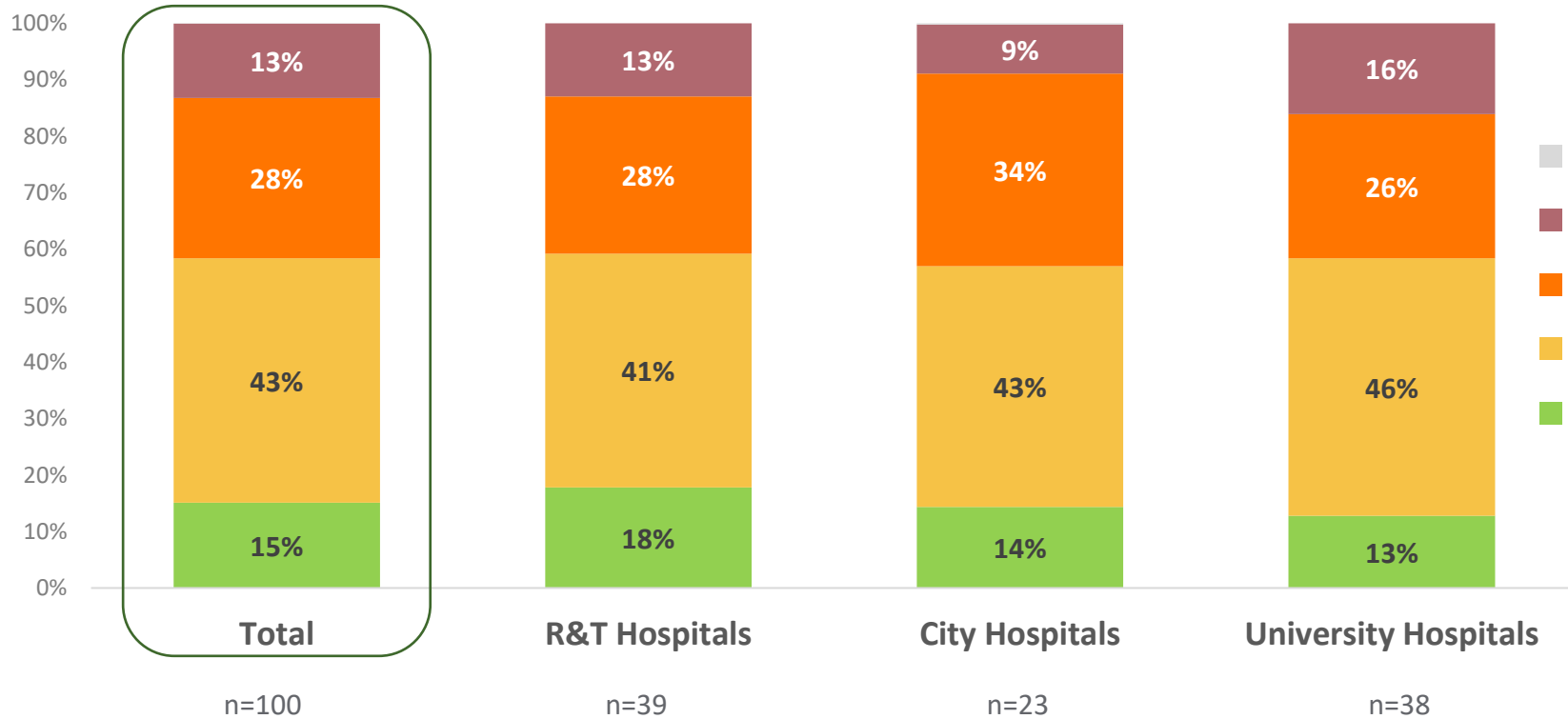
# RX share

By institution

After the 3rd loading dose, the retina specialists treat 43% of the DME patients with EYLEA. Lucentis' share is around 28%.

## After Loading Dose

% of patients



- Other
- Ozurdex
- Lucentis
- Eylea
- Altuzan / Avastin

### Reasons for prescribing Lucentis

Having a PFS form	68%
Effectiveness	41%
Reduces the burden on physicians	19%
Fewer side effects	1%

n=93

S8. DMÖ tedavisinde 3 Yükleme dozu sonrasında tercih ettiğiniz intravitreal enjeksiyonların yüzdesel dağılımını yapar mısınız?

S11. DMÖ hastalarınızda neden Lucentis'i tercih ettiğinizi belirtir misiniz?

Significantly higher than others

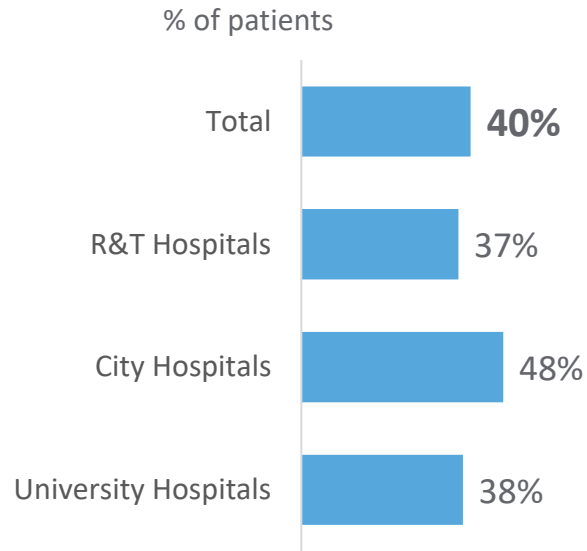
# No Response or Inadequate Response to DME Treatment & Brand Preferences



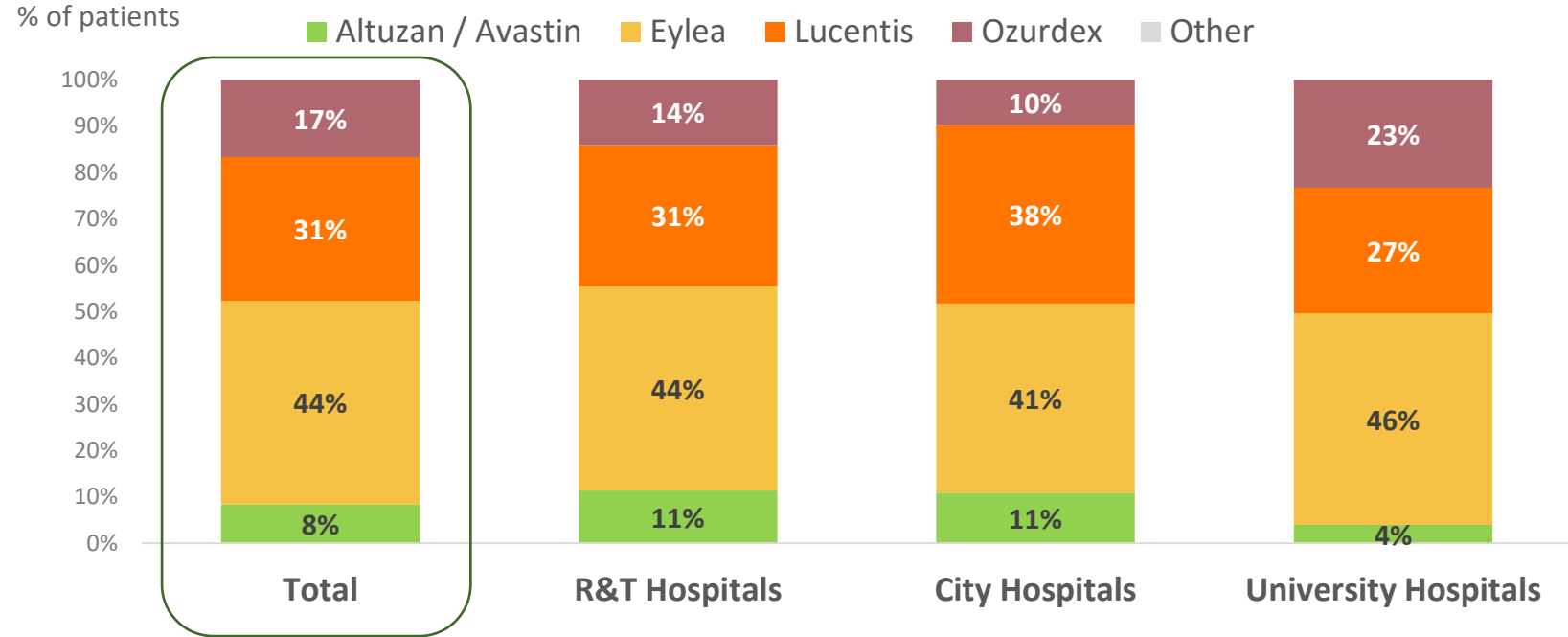
## By institution

After administering three loading doses, 40% of DME patients showed no response or an inadequate response. Among these, retina specialists treat 44% with EYLEA. Meanwhile, Lucentis is the preferred treatment for 31% of these patients.

### % of DME Patients with Insufficient or No Response to DME Treatment



### Brand Preferences



S9. Başlangıç 3 yükleme dozu uyguladığınız DMÖ hastalarınızın yüzde kaçında yanıtızlık veya yetersiz yanıt görülmektedir?

S10. 3 yükleme dozu sonrası yanıtızlık veya yetersiz yanıt görülen hastalarınızda tercih ettiğiniz intravitreal enjeksiyonların yüzdesel dağılımını yapar mısınız?

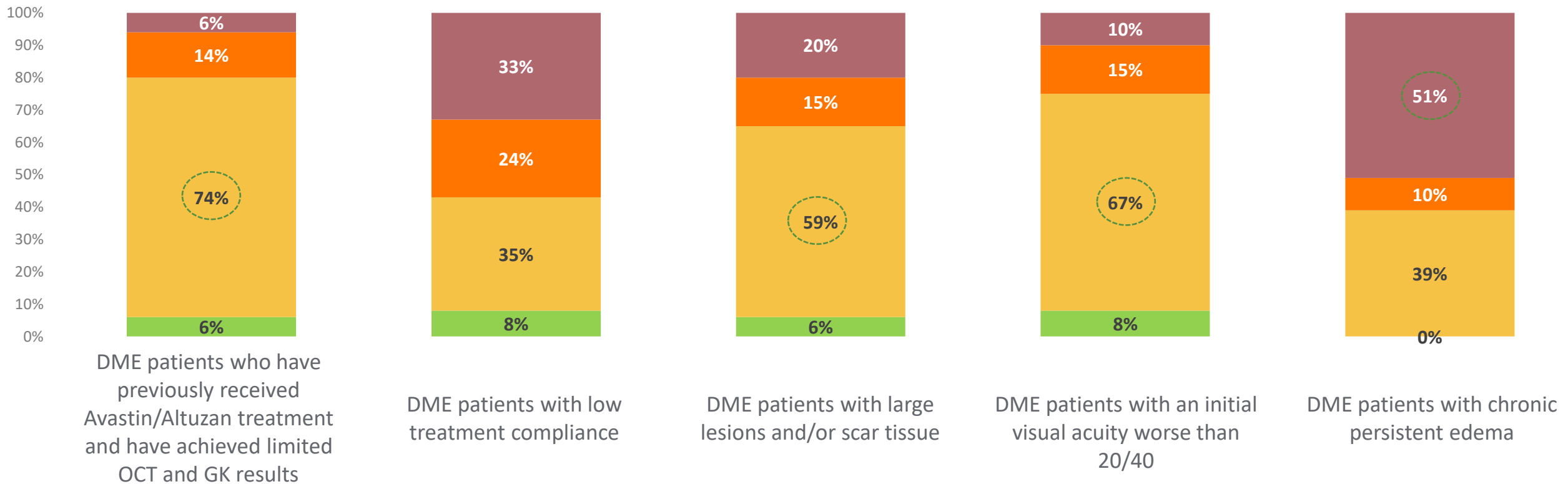
Significantly higher than others

# Preferred Intravitreal Injections for Different DME Patient Groups

Retina specialists often prefer Eylea for DME patients with limited OCT and GK results (after Altuzan), initial visual acuity worse than 20/40, and large lesions and/or scar tissue. They tend to choose OZURDEX for patients with chronic persistent edema.

% of retina specialists

■ Altuzan / Avastin ■ Eylea ■ Lucentis ■ Ozurdex



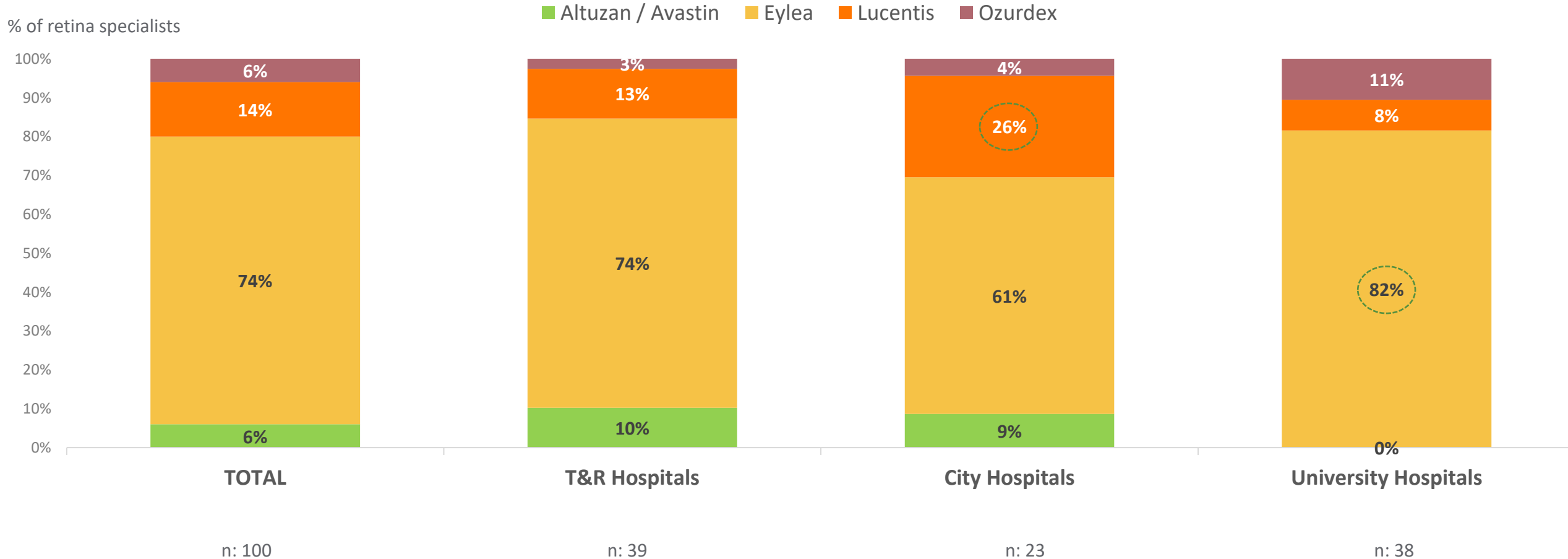
Base: 100 physicians

S40. Aşağıdaki her hasta grubu için en fazla tercih edeceğiniz Intravitreal enjeksiyonları belirtir misiniz?

Significantly higher than others

# Preferred Intravitreal Injections for DME patients who have previously received Avastin/Altuzan treatment and have achieved limited OCT and GK results

Retina specialists at university hospitals typically prefer Eylea for these DME patients, compared to specialists at other institutions. Meanwhile, Lucentis is more preferred in city hospitals.

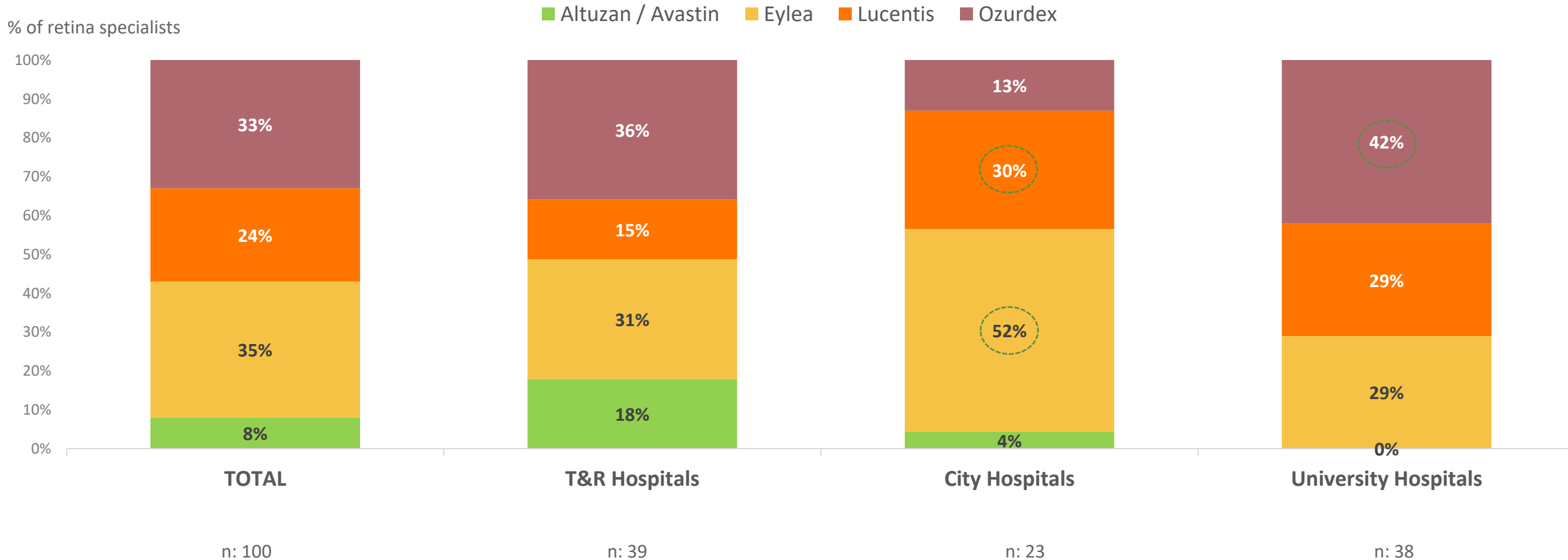


Significantly higher than others



# Preferred Intravitreal Injections for DME patients with low treatment compliance

City hospital retina specialists typically prefer Eylea for these DME patients compared to specialists at other institutions. On the other hand, Lucentis is more commonly chosen in city and university hospitals, while Ozurdex is favored in T&R and university hospitals.

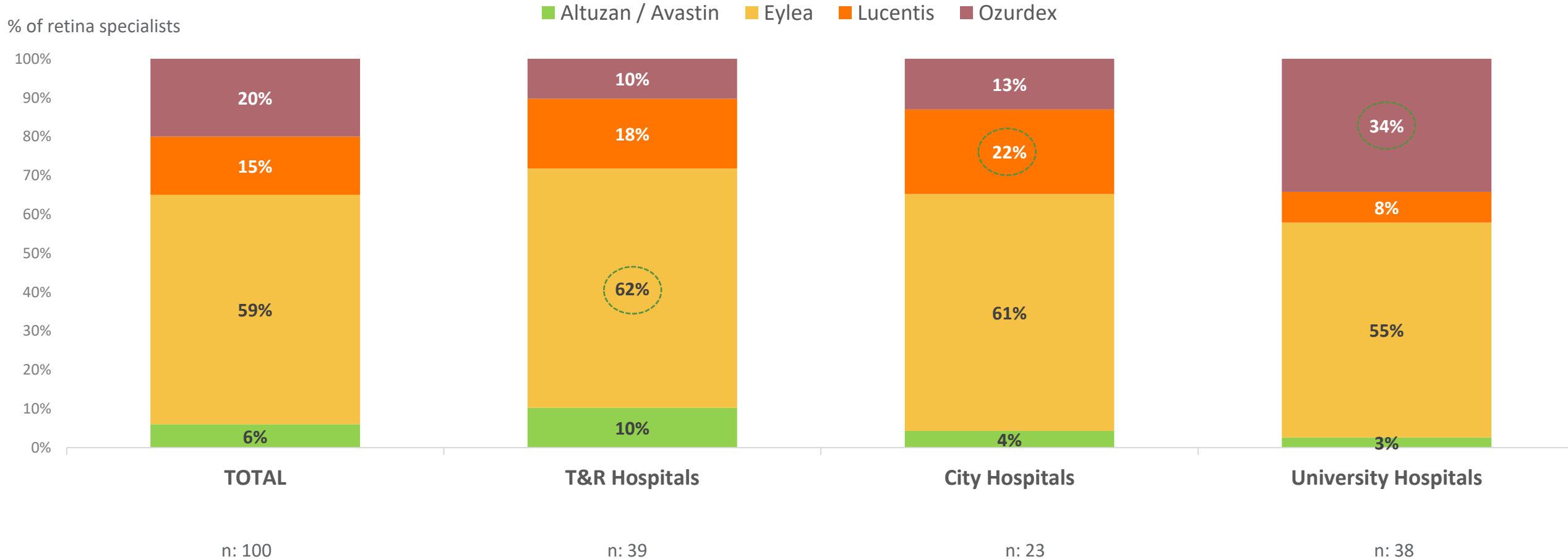


S40. Aşağıdaki her hasta grubu için en fazla tercih edeceğiniz Intravitreal enjeksiyonları belirtir misiniz?

Significantly higher than others

# Preferred Intravitreal Injections for DME patients with large lesions and/or scar tissue

Most of the retina specialists prefer Eylea for these DME patients. Meanwhile, Ozurdex is more preferred in university hospitals.

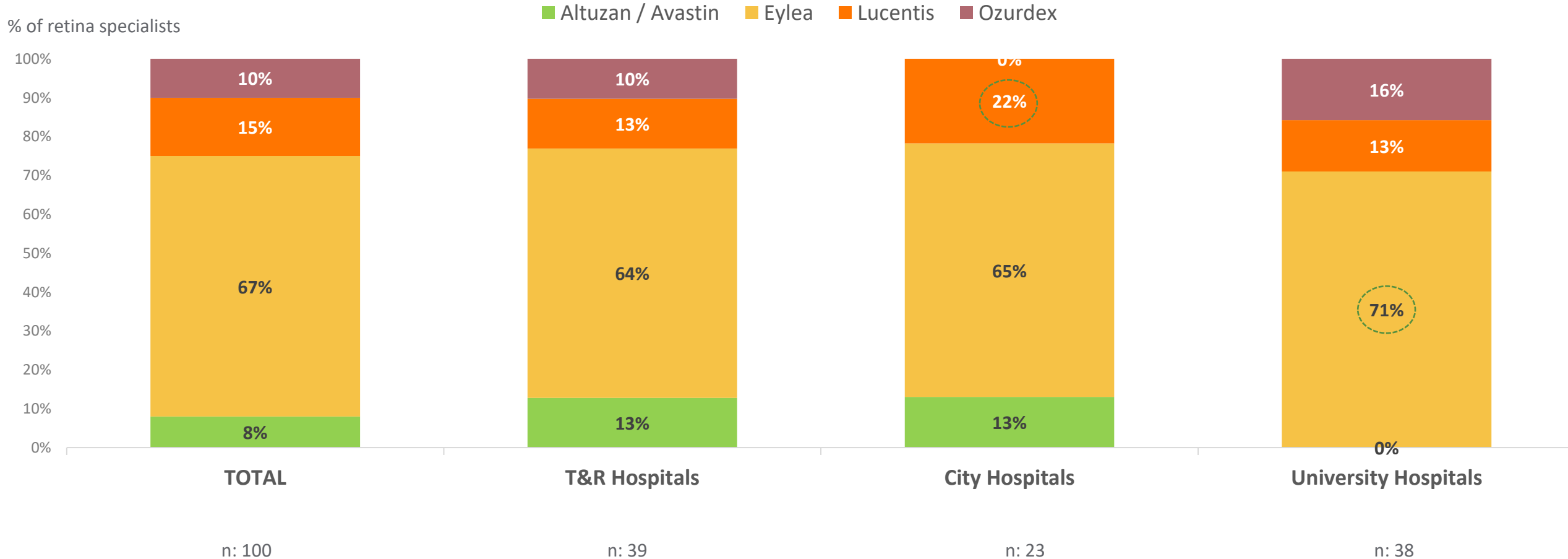


S40. Aşağıdaki her hasta grubu için en fazla tercih edeceğiniz Intravitreal enjeksiyonları belirtir misiniz?

Significantly higher than others

# Preferred Intravitreal Injections for DME patients with an initial visual acuity worse than 20/40

2/3 of the retina specialists prefer Eylea for the DME patients with an initial visual acuity worse than 20/40.

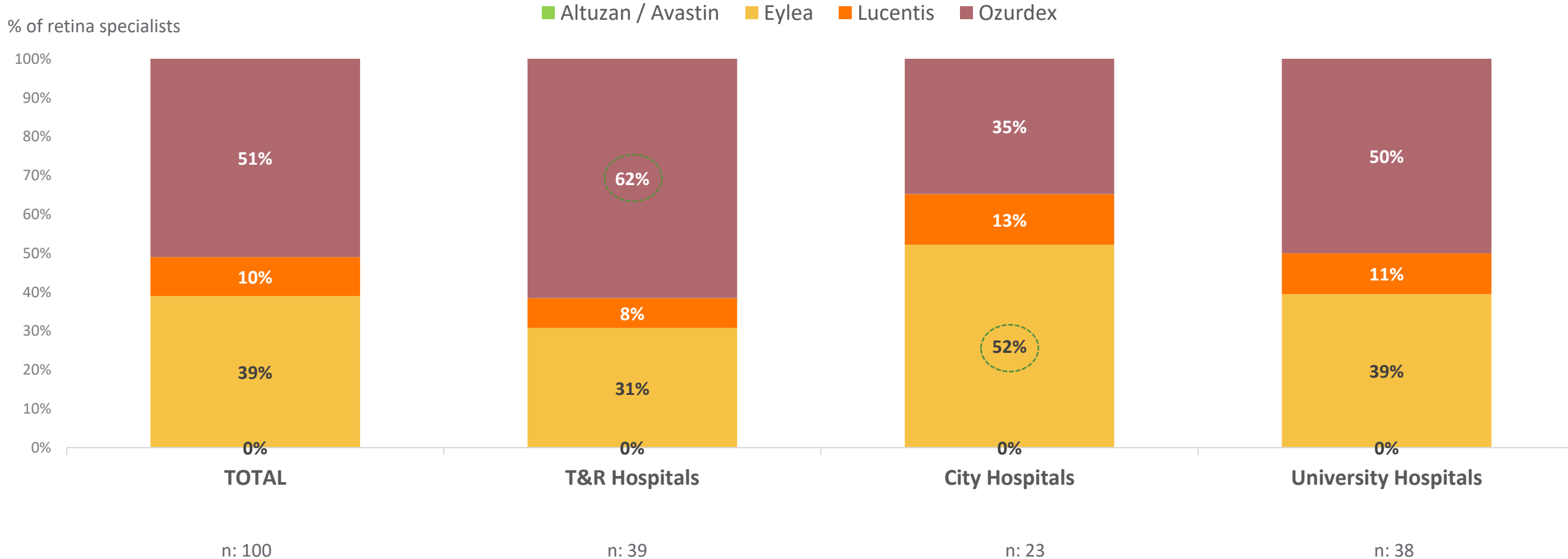


S40. Aşağıdaki her hasta grubu için en fazla tercih edeceğiniz Intravitreal enjeksiyonları belirtir misiniz?

Significantly higher than others

# Preferred Intravitreal Injections for DME patients with chronic persistent edema

Retina specialists at T&R & university hospitals typically prefer Ozurdex for these DME patients, compared to specialists at city hospitals. Meanwhile, Eylea is more preferred in city hospitals.



S40. Aşağıdaki her hasta grubu için en fazla tercih edeceğiniz Intravitreal enjeksiyonları belirtir misiniz?

Significantly higher than others



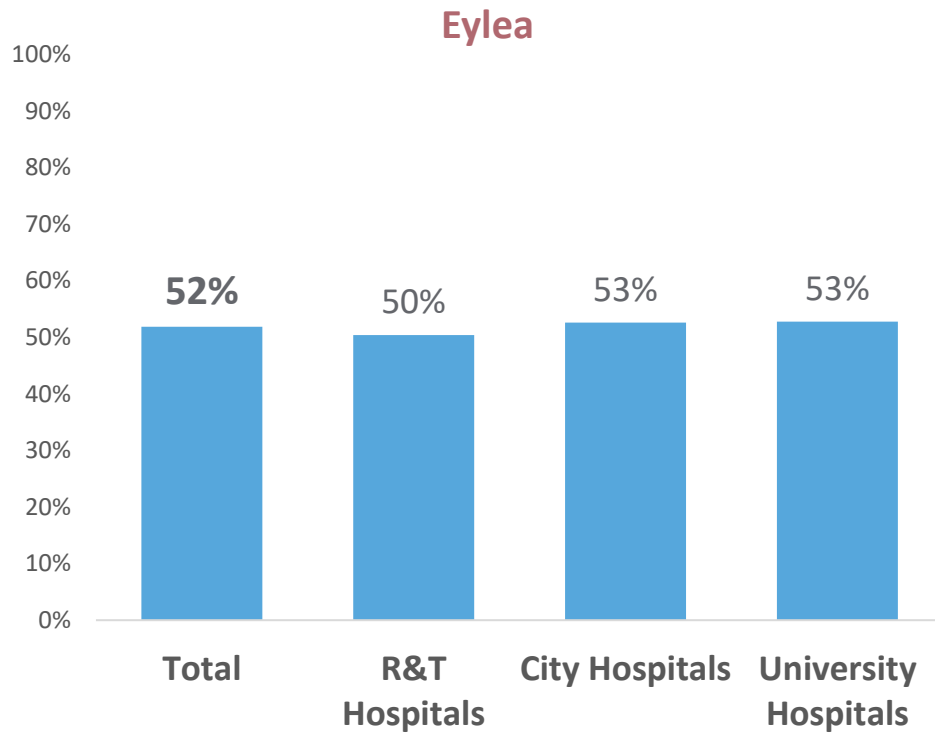
# Treatment Approaches

# Re-administering the initial dose

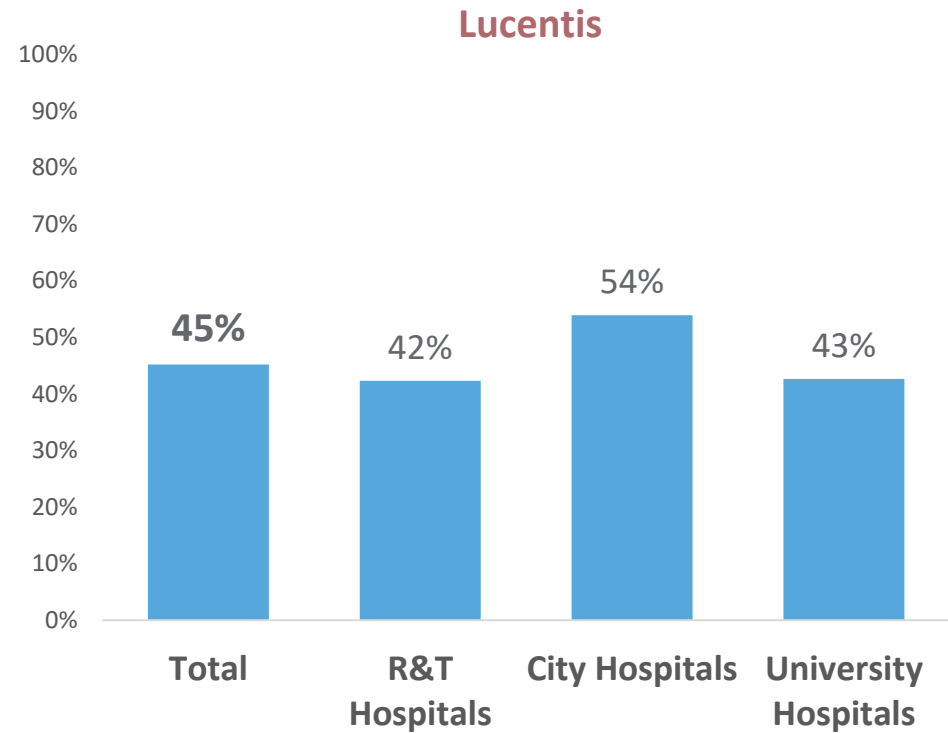
## By institution

Retina specialists re-administer the loading dose with these injections to around half of the DME patients who switch to Eylea and Lucentis after three loading doses with Altuzan / Avastin (Bevacizumab).

% of patients



% of patients



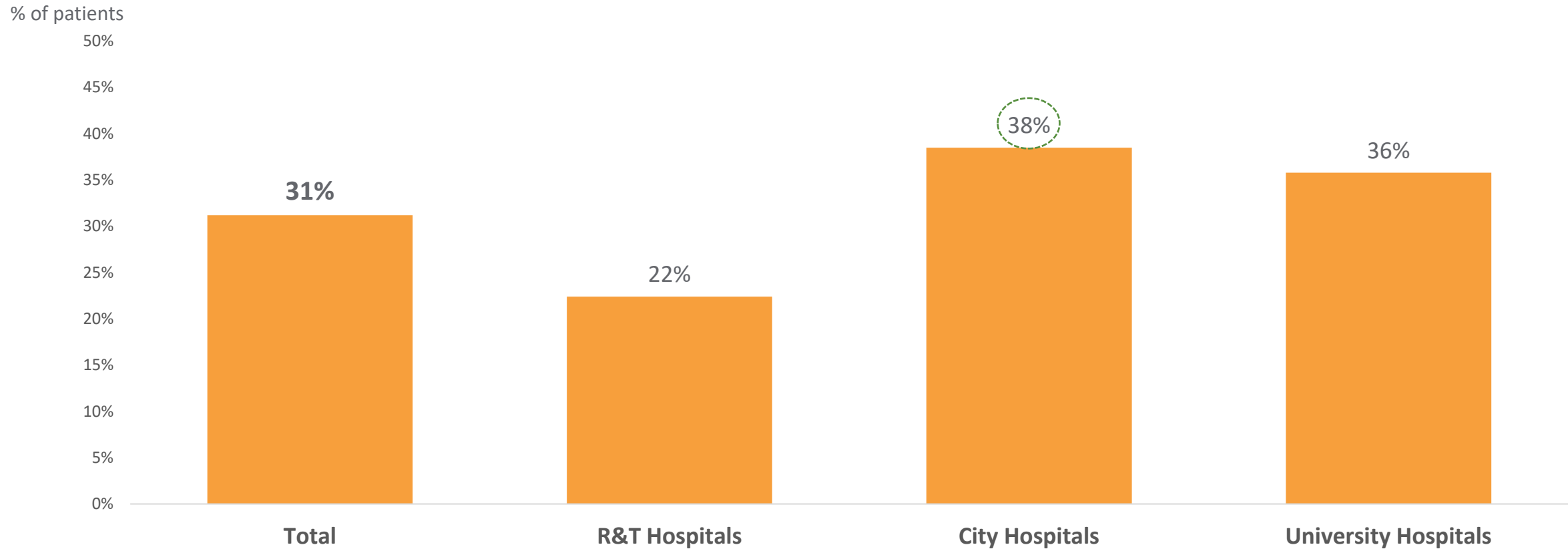
S12. Altuzan / Avastin (Bevacizumab) ile yaptığınız ÜÇ yükleme dozu sonrası Eylea ve Lucentis'e geçiş yaptığınız hastalarınızın yüzde kaçında bu enjeksiyonlarla tekrar yükleme dozu uyguluyorsunuz?

Significantly higher than others

# % of DME patients received only a follow-up examination **in a month**, with no injection administered

## By institution

In an average month, only a follow-up examination was administered to 31% of DME patients, with no injection. This rate is higher in city and university hospitals.



# Treatment Success Criteria in DME Treatment

By institution

% of retina specialists

	TOTAL	T&R Hospitals 39	City Hospitals 23	University Hospitals 38
Prevents vision loss	61%	59%	65%	61%
Sustains visual gains	40%	33%	<b>52%</b>	39%
Reduces vision loss	37%	44%	35%	32%
Reduces retinal thickness	37%	<b>38%</b>	22%	<b>45%</b>
Prevents persistent macular edema after the initial six months of treatment	37%	28%	39%	<b>45%</b>
Provides better vision gains	35%	36%	39%	32%
Reduces bleeding in the retina	34%	<b>44%</b>	22%	32%
Reduces the need for injections/treatments	19%	18%	26%	16%

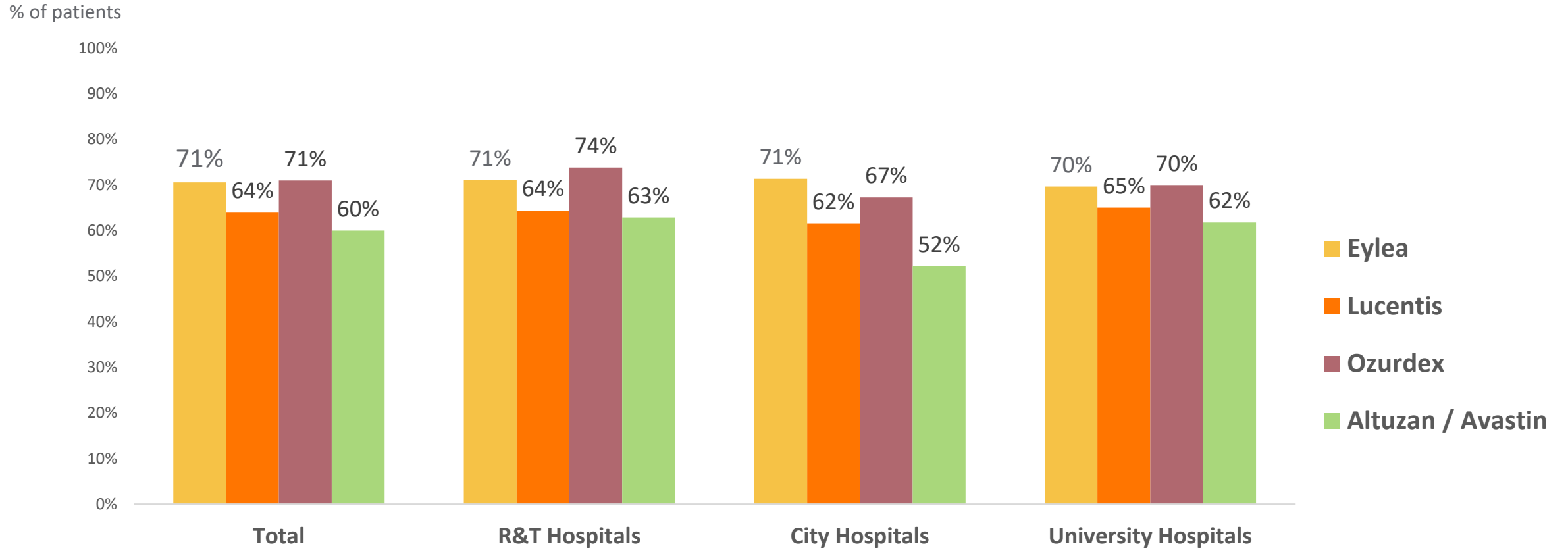
Significantly higher than others



# % of DME patients achieving the treatment goal

## By institution

In 70% of DMO patients treated with Eylea and Ozurdex, retina specialists state that they achieved their treatment goal. This rates are slightly lower in DME patients treated with Lucentis and Avastin.



S15. .... ile tedavi uyguladığınız DMÖ hastalarınızın yüzde kaçında hedeflediğiniz tedavi sonucuna ulaşıyorsunuz?

Significantly higher than others

# Treatment Approaches for Cases Where Treatment Success Hasn't Been Achieved

## TOTAL

Retina specialists often shorten injection intervals if they are unable to meet the treatment goal. They switch to EYLEA from Lucentis, Ozurdex, or Avastin. They may also choose steroids over Eylea.

Base	EYLEA	LUCENTIS	OZURDEX	ALTUZAN/AVASTIN
	100	100	100	100
% of DME patients achieving the treatment goal	71%	64%	71%	60%
<b>% of DME patients NOT achieving the treatment goal</b>	<b>29%</b>	<b>36%</b>	<b>29%</b>	<b>40%</b>
	↓	↓	↓	↓
Re-administering AVASTIN and then switching to EYLEA (if necessary).	5%	29% <b>2</b>	40% <b>2</b>	48% <b>1</b>
Re-administering AVASTIN and then switching to LUCENTIS (if necessary).	17%	7%	17%	30% <b>2</b>
Re-administering AVASTIN and then switching to STEROIDS (if necessary).	28% <b>2</b>	18%	-	23%
Shortening the injection intervals.	48% <b>1</b>	42% <b>1</b>	41% <b>1</b>	-
Other	2%	3%	3%	-

# Treatment Approaches for Cases Where Treatment Success Hasn't Been Achieved

By institution



Base	EYLEA			LUCENTIS			OZURDEX			ALTUZAN/AVASTIN		
	T&R Hosp	City Hosp.	Univ Hosp.	T&R Hosp	City Hosp.	Univ Hosp.	T&R Hosp	City Hosp.	Univ Hosp.	T&R Hosp	City Hosp.	Univ Hosp.
% of DME patients achieving the treatment goal	71%	71%	70%	64%	62%	65%	74%	67%	70%	63%	52%	62%
<b>% of DME patients NOT achieving the treatment goal</b>	<b>29%</b>	<b>29%</b>	<b>30%</b>	<b>36%</b>	<b>38%</b>	<b>35%</b>	<b>26%</b>	<b>33%</b>	<b>30%</b>	<b>37%</b>	<b>48%</b>	<b>38%</b>
Base	39	23	38	39	23	38	39	23	38	39	23	38
Re-administering AVASTIN and then switching to EYLEA (if necessary).	5%	7%	2%	18%	<b>45%</b>	31%	29%	<b>54%</b>	<b>44%</b>	<b>48%</b>	<b>38%</b>	<b>52%</b>
Re-administering AVASTIN and then switching to LUCENTIS (if necessary).	12%	15%	25%	8%	6%	8%	11%	18%	23%	35%	25%	25%
Re-administering AVASTIN and then switching to STEROIDS (if necessary).	26%	36%	25%	14%	15%	24%	-	-	-	16%	<b>37%</b>	23%
Shortening the injection intervals.	<b>51%</b>	<b>42%</b>	<b>47%</b>	<b>54%</b>	31%	<b>37%</b>	<b>56%</b>	22%	35%	-	-	-
Other	5%	0%	1%	5%	4%	0%	4%	6%	0%	-	-	-

S16/S17/s18/S19. .... ile tedavisine devam ettiğiniz DMÖ hastalarınızda hedeflediğiniz tedavi başarısına ulaşılmadığı durumlarda nasıl bir yol izliyorsunuz?

Significantly higher than others

# Average Number of Injections Before a Change due to Inadequate or Non-responsive Treatment

## By institution

The treatment for DME patients using Lucentis, Ozurdex, or Avastin is changed after **4,1** injections due to treatment failure or lack of response. However, for patients using Ozurdex, this average decreases to **2.5 injections**.

	Base	EYLEA	LUCENTIS	OZURDEX	ALTUZAN/AVASTIN
<b>TOTAL</b>	100	<b>4.13</b>	<b>4.07</b>	<b>2.54</b>	<b>4.14</b>
T&R Hospitals	39	4.19	3.97	2.49	3.74
City Hospitals	23	4.22	4.04	3.17	5.00
University Hospitals	38	4.03	4.18	2.26	4.18

S20. .... ile tedavi uyguladığınız DMÖ hastalarınızda ortalama olarak kaç enjeksiyon sonra uyguladığınız tedaviyi başarısızlık nedeniyle veya yanıt alamadığınız için değiştirdiyorsunuz?

Significantly higher than others

# Reasons for using PFS form

## By institution

		TOTAL	T&R Hospitals 39	City Hospitals 23	University Hospitals 38
% of retina specialists	Easy to administer	48%	44%	65%	42%
	Reduces risk of endophthalmitis	47%	69%	35%	32%
	Reliable	12%	8%	13%	16%
	Effective	11%	8%	9%	16%
	Long injection intervals	8%	15%	-	5%
	Increases patient compliance	2%	3%	-	3%
	NA	6%	-	4%	13%

Significantly higher than others

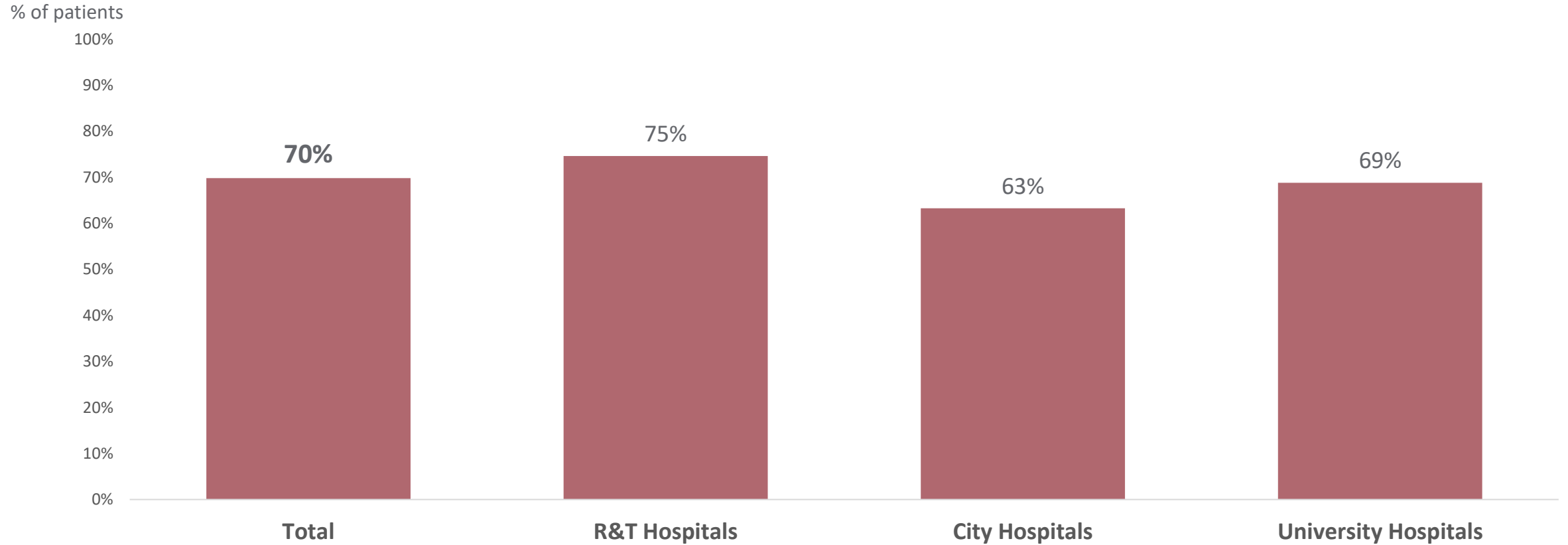


# Management of DME Patients

# % of DME patients given Intravitreal Injection at intervals of 4 - 6 weeks

## By institution

Retina specialists can administer intravitreal injections to 70% of DME patients at intervals of 4-6 weeks.



S23. Anti-VEGF tedavisi uyguladığınız DMÖ hastalarınızı düşündüğünüzde, yükleme dozunu 4-6 hafta aralıklarla uygulayabildiğiniz hastalarınız oranı nedir?

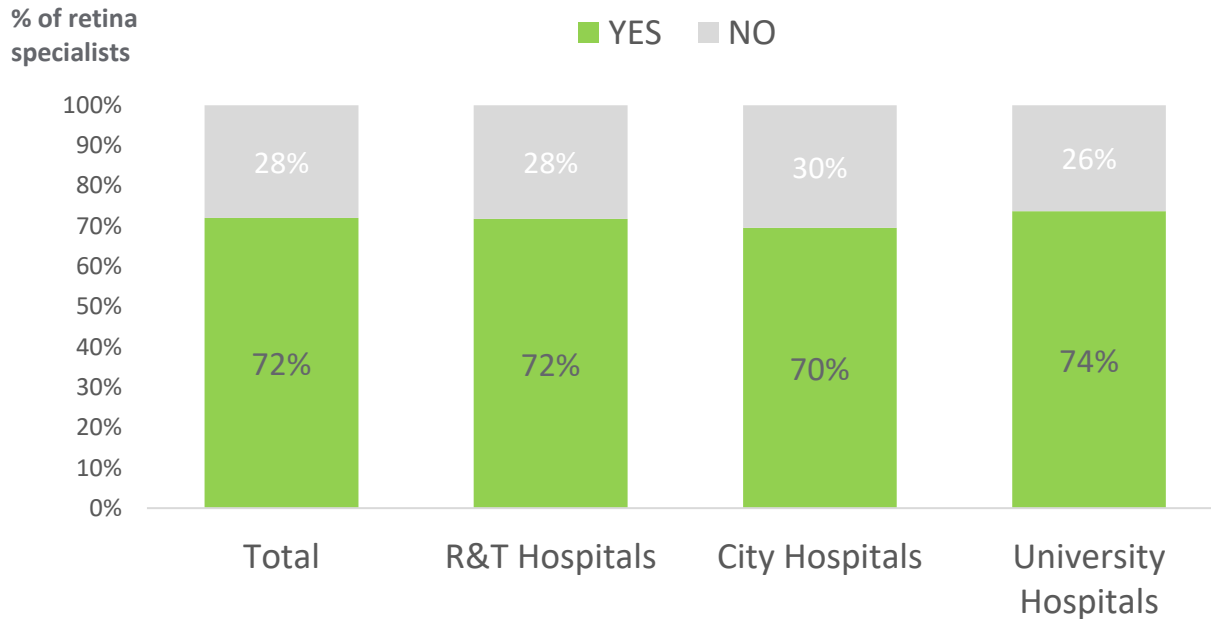
Significantly higher than others

# Scheduling Appointments for Loading Doses

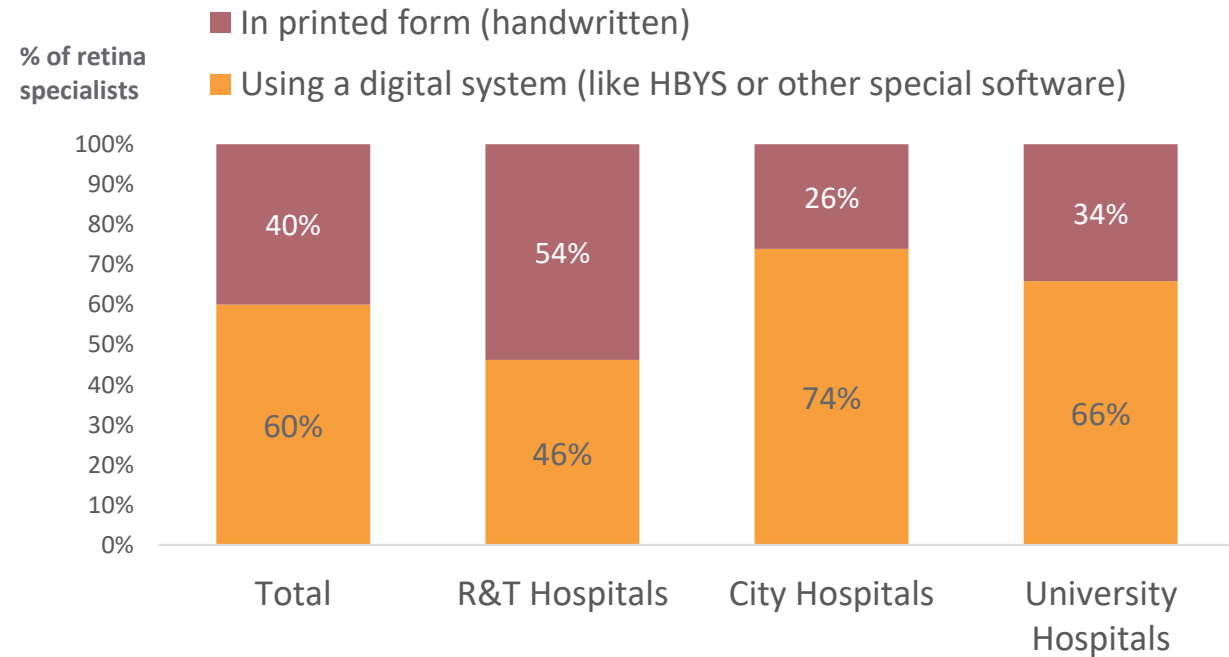
## By institution

Retina specialists schedule all loading dose appointments for 72% of DME patients at once. At R&T hospitals, patients receive printed forms to schedule their appointments. Meanwhile, at City and University Hospitals, retina specialists use digital systems for scheduling.

### Does your clinic provide patients with all their loading dose appointments at once?



### How do you schedule appointments?



S24. Kliniğinizde yükleme dozu randevularınızı baştan itibaren toplu olarak hastaya veriyor musunuz?

S25. Randevuları nasıl veriyorsunuz?

Significantly higher than others



# Scheduling and Administration

TOTAL



More than half of the retina specialists state that they're unable to provide injections to their DME patients on the day they decide on intravitreal injection treatment. They can, however, administer the treatment to approximately 60% of these patients within a week. The remaining patients wait longer than a week to receive the treatment.

	TOTAL	T&R Hospitals	City Hospitals	University Hospitals
Base	100	39	23	38
<b>Is it possible for DME patients to receive injections on the decision day?</b>				
YES	46%	41%	43%	53%
NO	54%	59%	57%	47%
	↓	↓	↓	↓
<b>What is the average time between the decision and the injection?</b>				
	54	23	13	18
Within a week	19%	17%	31%	11%
A week later	39%	13%	69%	50%
Within 15 days	17%	22%	0%	22%
A month later	26%	48%	0%	17%

S27. Kliniğinizde devam tedavisi alan hastalarda enjeksiyon kararı alındıktan sonra aynı gün içinde uygulama yapılabilen mi?

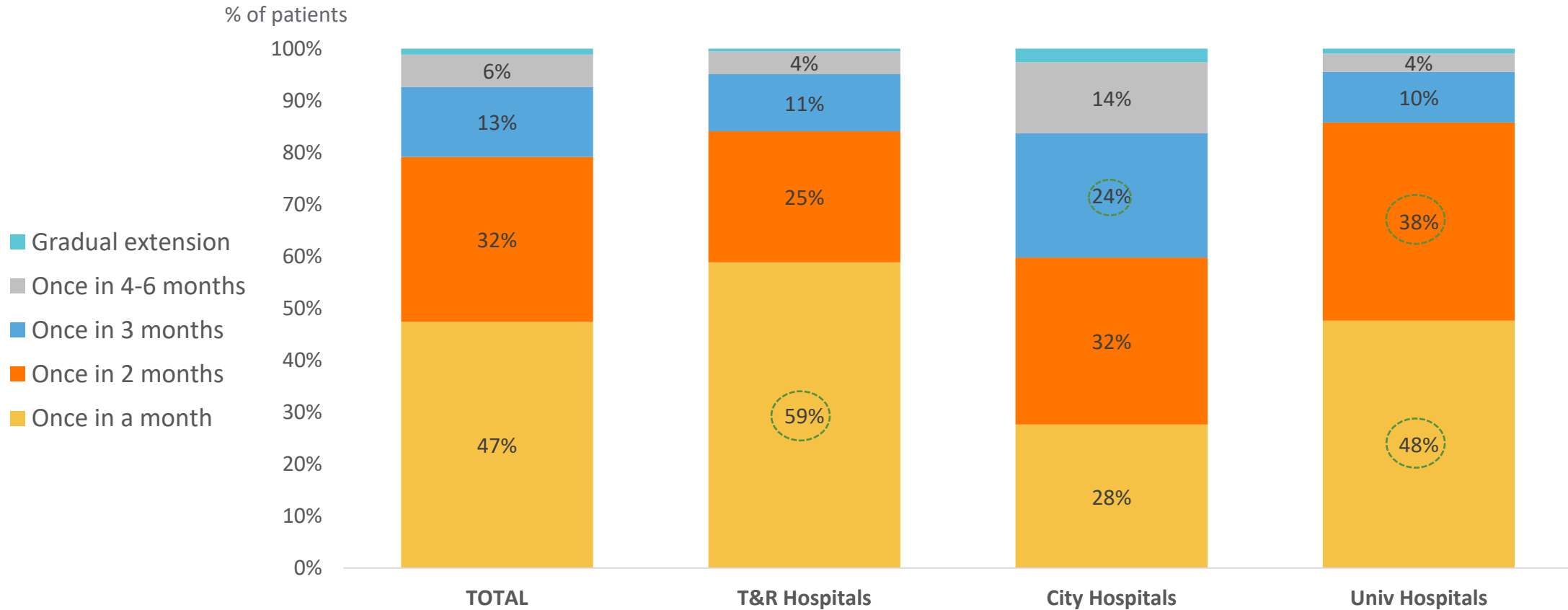
S28. Hastalar muayenede enjeksiyon kararı verildikten ortalama kaç gün sonra enjeksiyonlarını yaptırabilmektedir?

Significantly higher than others

# Control Frequency

By institution

Retina specialists prefer to monitor their patients monthly.  
Extending intervals between injections are seen in only 1% of the patients



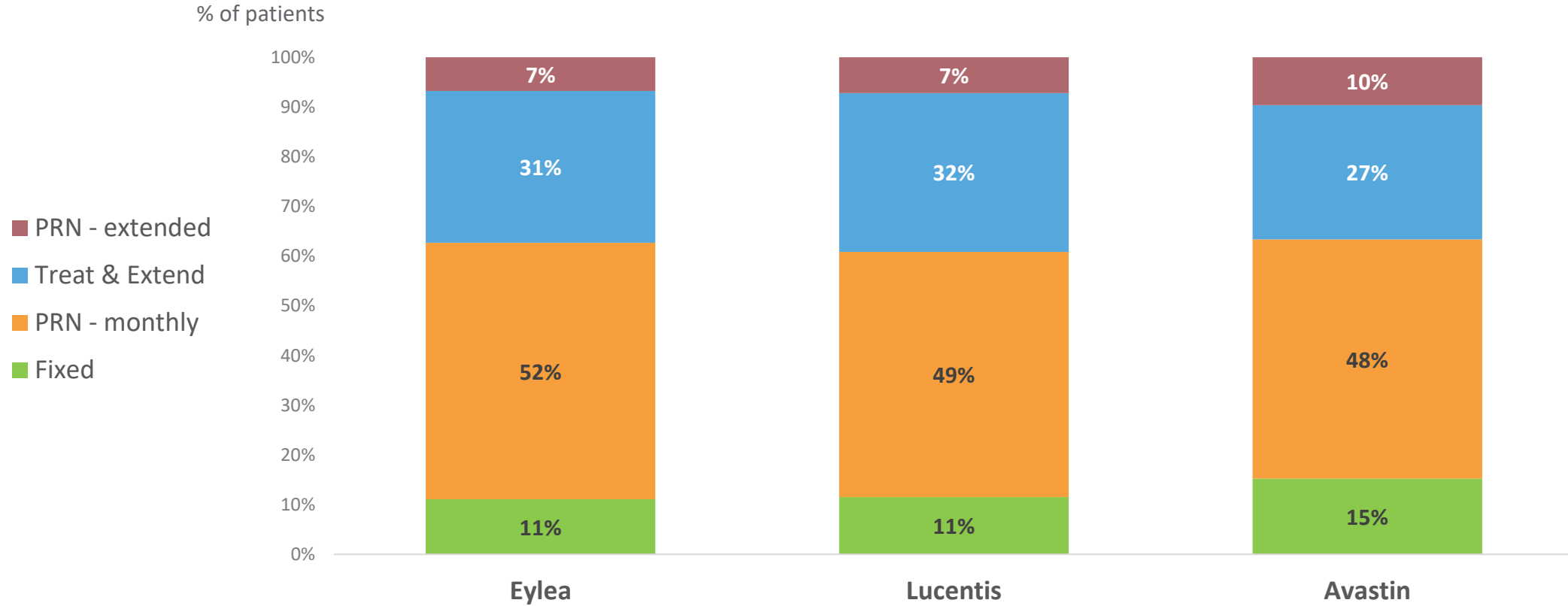


# Dose Regimens

# Dose Regimens

TOTAL

The retina specialists apply the PRN-monthly dosing regimen to half of the DME patients and treat around 30% of the DME patients with the T&E dosing regimen.



S26. DMÖ tedavisinde anti-VEGF tedavisi uyguladığınız hastalarınızı düşündüğünüzde, yükleme dozu sonrasında 1. yılda tedavi rejimi tercihinize göre hastalarınızın yüzdesel dağılımını yapar mısınız?

Significantly higher than others

# Dose Regimens

## By institution

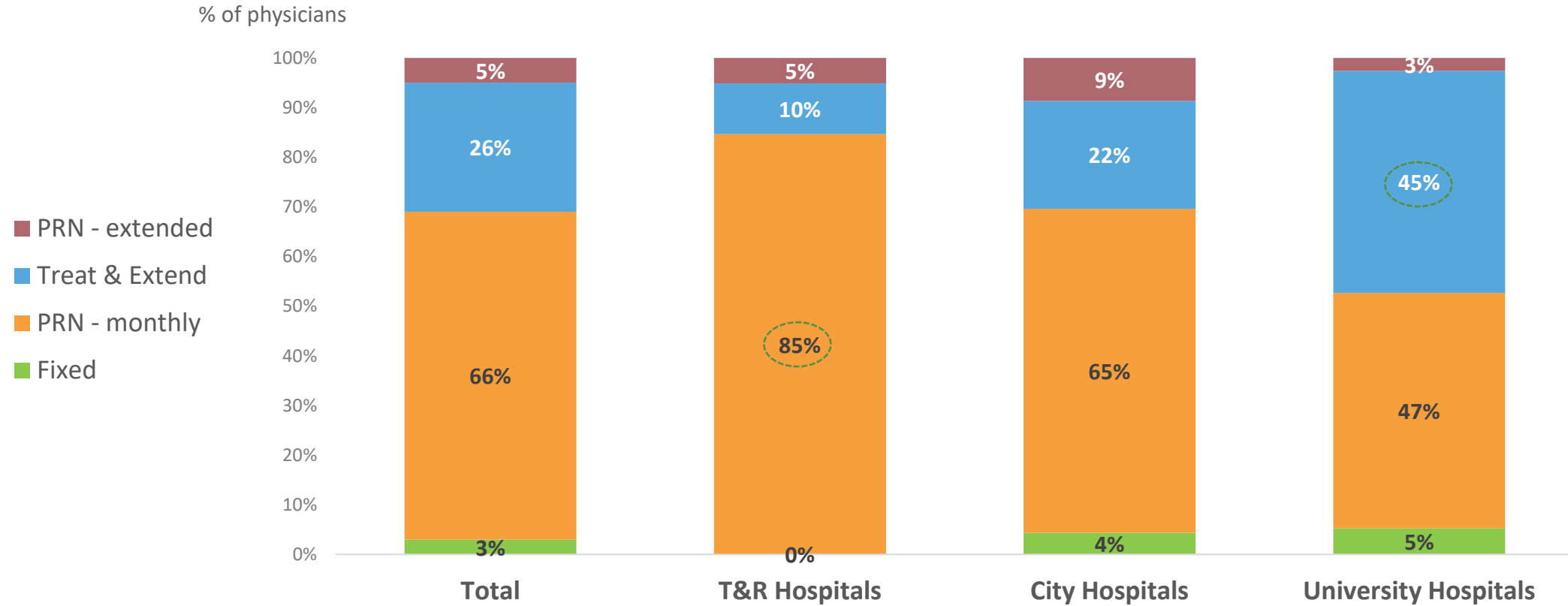
The retina specialists apply the PRN-monthly dosing regimen to half of the DME patients and treat around 30% of the DME patients with the T&E dosing regimen.

	Base	EYLEA			LUCENTIS			ALTUZAN/AVASTIN		
		T&R Hosp	City Hosp.	Univ Hosp.	T&R Hosp	City Hosp.	Univ Hosp.	T&R Hosp	City Hosp.	Univ Hosp.
% of patients		39	23	38	39	23	38	39	23	38
Fixed		8%	12%	14%	8%	11%	15%	4%	26%	25%
PRN - monthly		60%	50%	43%	59%	50%	37%	61%	42%	34%
Treat & Extend		28%	28%	35%	29%	29%	36%	26%	19%	32%
PRN - extended		4%	10%	8%	5%	9%	9%	9%	13%	9%

# Preferred Dose Regimens

TOTAL

The retina specialists state their preference for the PRN – monthly dosing regimen. At university hospitals, they prefer the Treat Extended regimen more.



# Average Number of Injections

## TOTAL

The number of injections has decreased over the years, yet there are no significant differences in the number of injections based on dose regimens.

### «Fixed» & «Treat & Extend» Treatment Regimens


	EYLEA	LUCENTIS	ALTUZAN/ AVASTIN
Base	84	80	47
1st year	5.5	5.4	<b>6.1</b>
2nd year	3.9	<b>4.0</b>	3.7
3rd year	<b>2.8</b>	<b>2.8</b>	2.6

### «PRN monthly & extended» Treatment Regimens

	EYLEA	LUCENTIS	ALTUZAN/ AVASTIN
Base	88	81	55
1st year	5.4	5.3	<b>5.8</b>
2nd year	3.7	3.7	<b>4.1</b>
3rd year	2.7	2.7	<b>3.2</b>

S31. Sabit doz ya da tedavi et ve uzat rejimi uyguladığınız DMÖ hastalarınızda yükleme dozu sonrasında birinci, ikinci ve üçüncü yıl için ortalama enjeksiyon sayıları nedir?

S32. PRN ya da gözlemlenilen ve uzat uyguladığınız DMÖ hastalarınızda birinci, ikinci ve üçüncü yıl için ortalama enjeksiyon sayıları nedir?

 Significantly higher than others



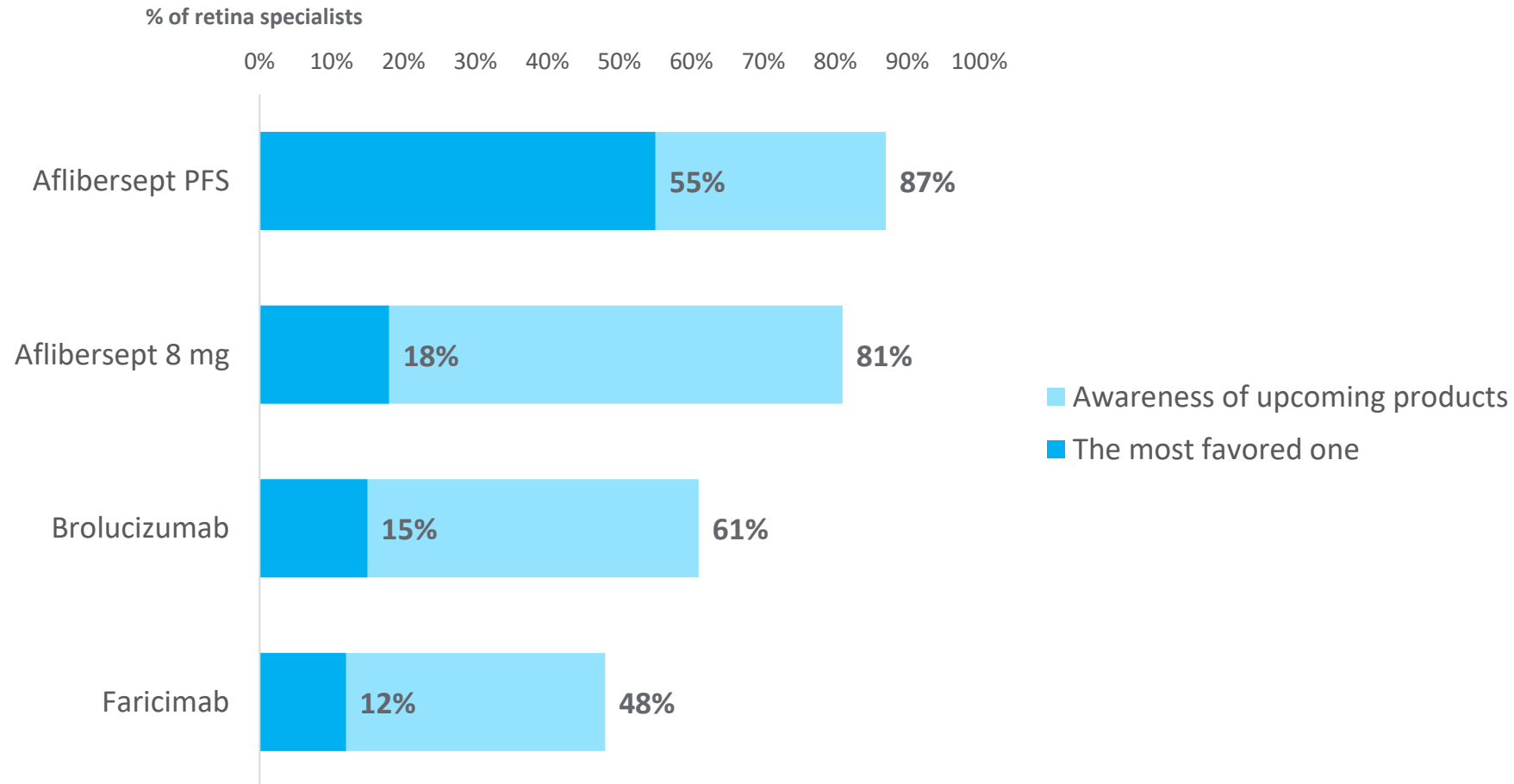
# Attitude Towards New Products & Forms



# Awareness of upcoming products in DME treatment

TOTAL

More than four-fifths of physicians are aware that "Aflibercept PFS form and 8 mg" are upcoming. The PFS form of Aflibercept is the most preferred.



S33. DMÖ tedavisinde geliştirilmekte olan ve/veya gelecek ilaçlardan veya mevcut tedavilerin formlarından elinizde olmasını beklediğiniz ürünleri söyler misiniz?

S34. Bu ürünlerden hangisini diğerlerinden daha fazla tercih edersiniz?

○ Significantly higher than others

# Awareness of upcoming products in DME treatment

By institution

More than four-fifths of physicians are aware that "Aflibercept PFS form and 8 mg" are upcoming. The PFS form of Aflibercept is the most preferred.

% of retina specialists

## T&R Hospitals

## City Hospitals

## University Hospitals

Awareness of upcoming products The most favored one

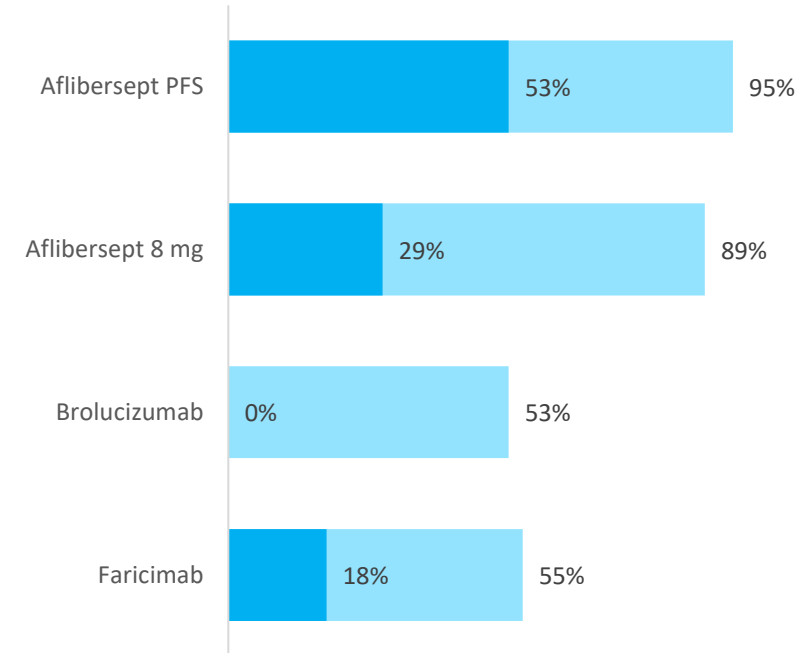
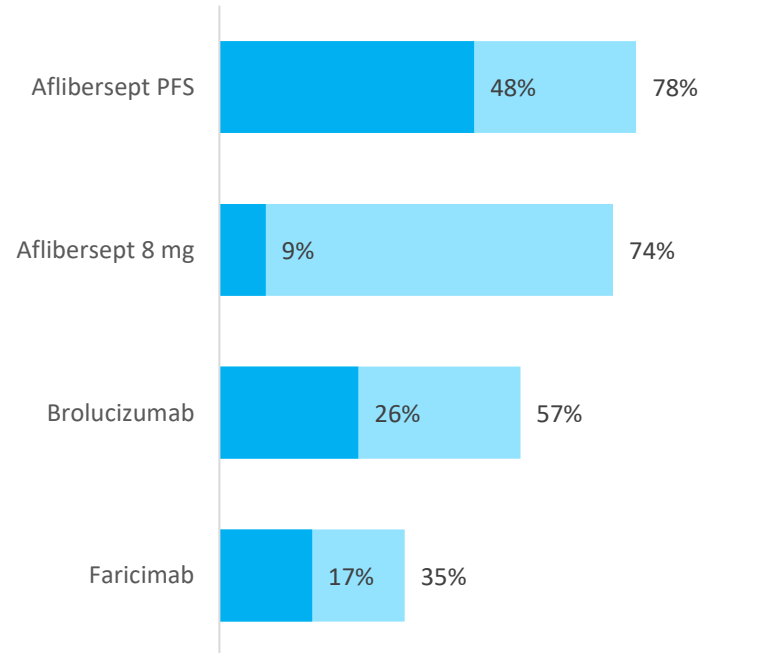
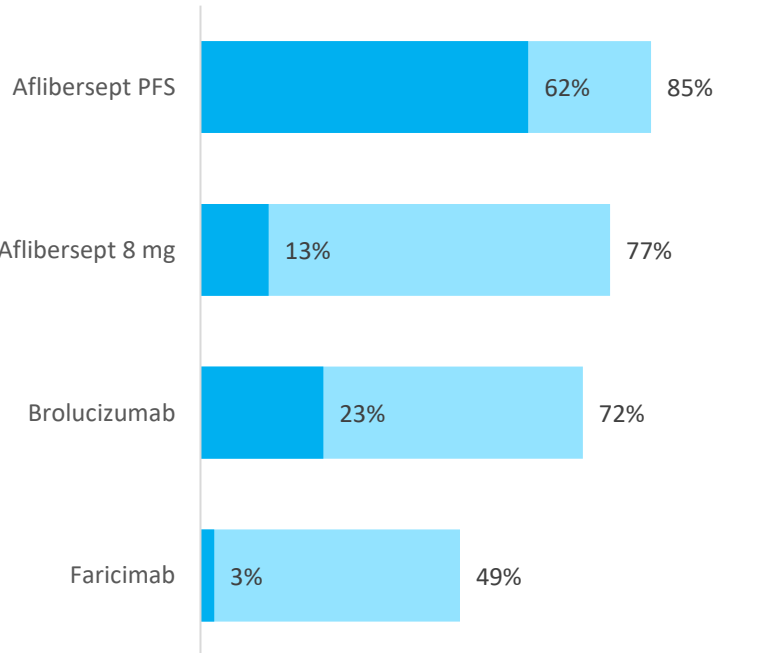
Awareness of upcoming products The most favored one

Awareness of upcoming products The most favored one

0% 20% 40% 60% 80% 100%

0% 20% 40% 60% 80% 100%

0% 20% 40% 60% 80% 100%



S33. DMÖ tedavisinde geliştirilmekte olan ve/veya gelecek ilaçlardan veya mevcut tedavilerin formlarından elinizde olmasını beklediğiniz ürünleri söyler misiniz?

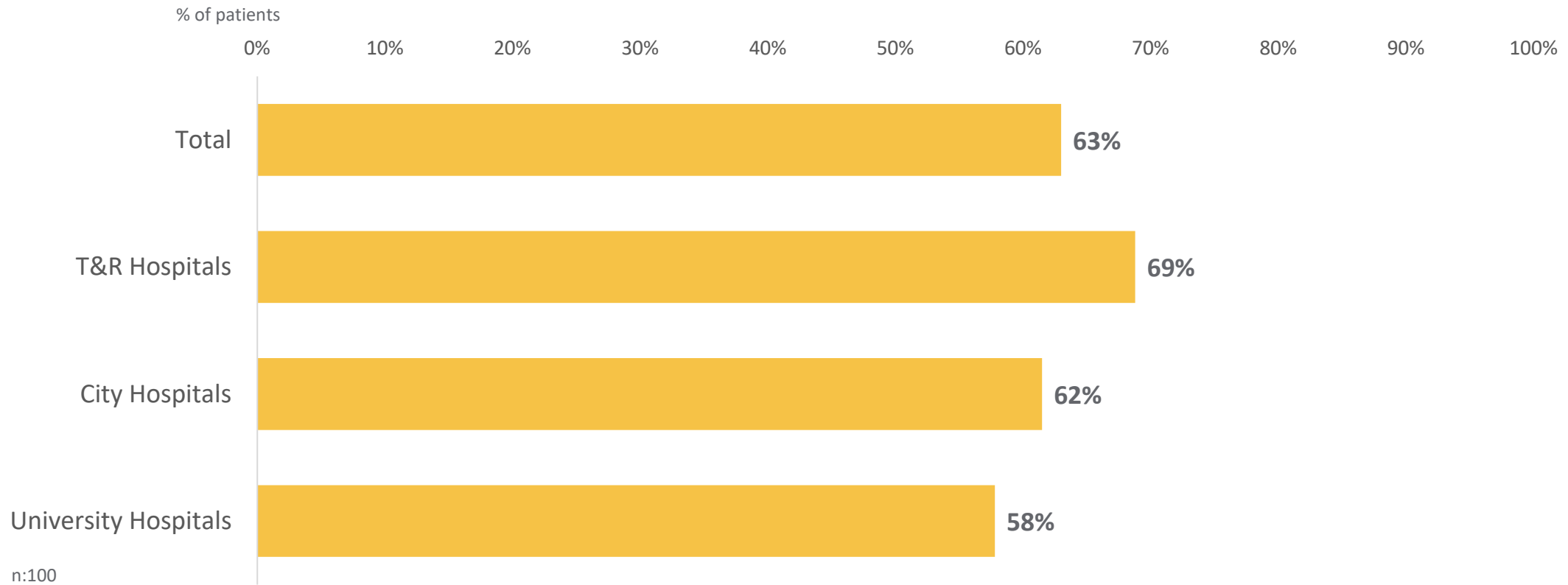
S34. Bu ürünlerden hangisini diğerlerinden daha fazla tercih edersiniz?

Significantly higher than others

# Switching rate from Lucentis PFS form to Eylea PFS form

TOTAL

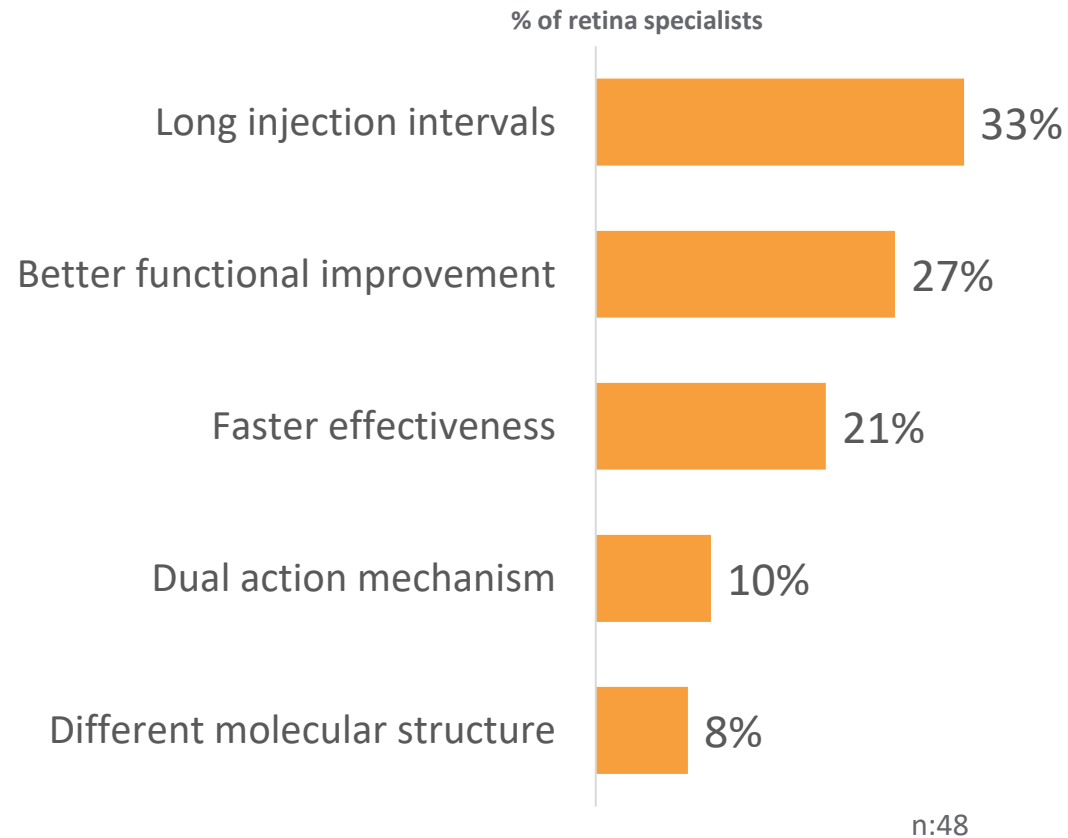
if Eylea was available in PFS form, Retina specialists would likely prescribe it to 63% of DME patients over the PFS form of Lucentis.



*68% of physicians stating the PFS form as the reason for choosing Lucentis*

# Expectations for Faricimab Treatment

Retina specialists primarily anticipate Faricimab treatment to provide **extended injection intervals** and **enhanced functional improvement**.

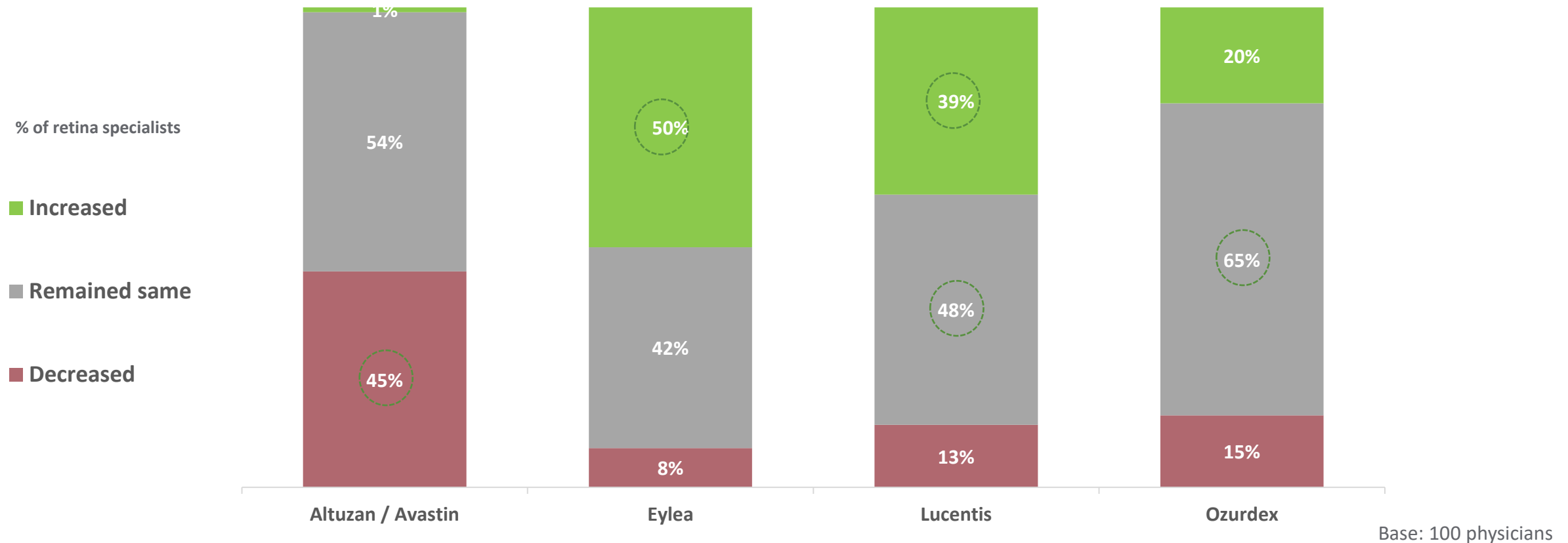


Significantly higher than others

# Changes in Prescription Frequency for DME Treatment in the Next 6 Months

- Considering SUT regulations and upcoming treatments

45% of retina specialists state that they will reduce their Avastin prescriptions when they consider upcoming treatments and SUT regulations. However, under the same circumstances, Eylea prescriptions are expected to increase.



# Changes in Prescription Frequency for DME Treatment in the Next 6 Months



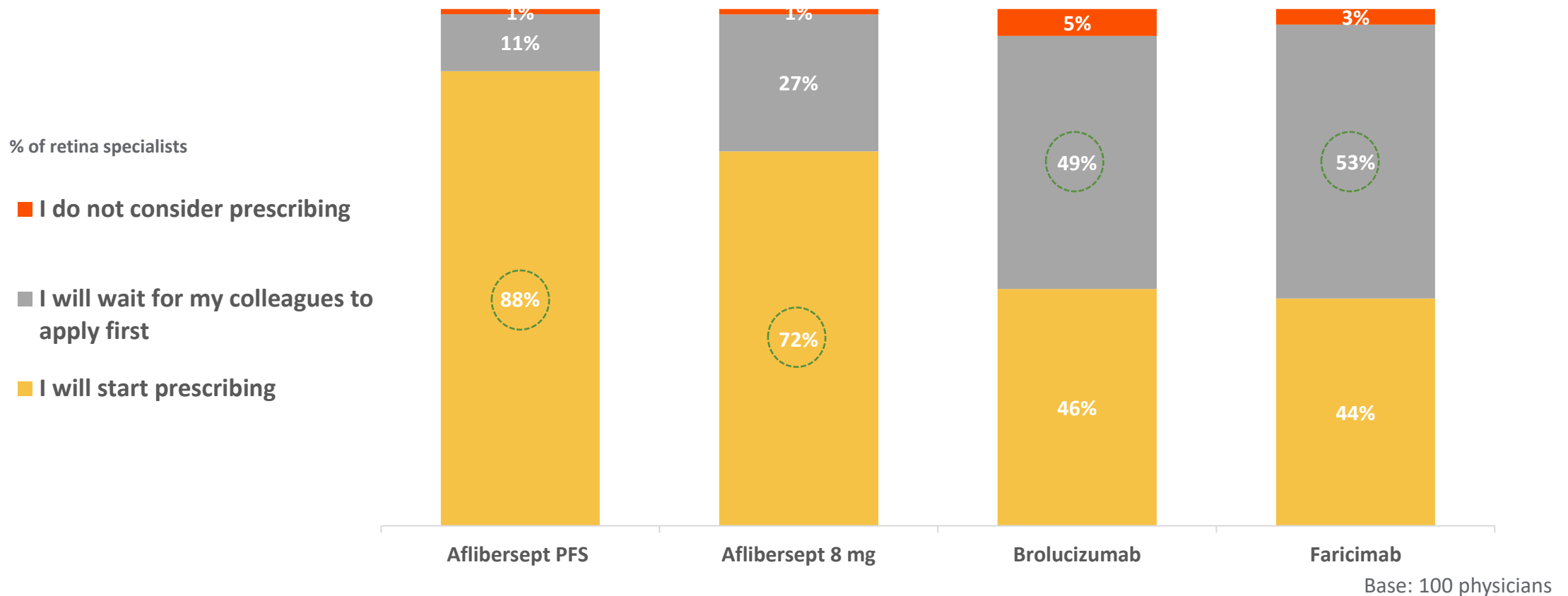
- Considering SUT regulations and upcoming treatments

45% of retina specialists state that they will reduce their Avastin prescriptions when they consider upcoming treatments and SUT regulations. However, under the same circumstances, Eylea prescriptions are expected to increase.

	ALTUZAN/AVASTIN			EYLEA			LUCENTIS			OZURDEX		
	T&R Hosp	City Hosp.	Univ Hosp.	T&R Hosp	City Hosp.	Univ Hosp.	T&R Hosp	City Hosp.	Univ Hosp.	T&R Hosp	City Hosp.	Univ Hosp.
Base	39	23	38	39	23	38	39	23	38	39	23	38
<b>Increased</b>	3%	-	-	46%	48%	56%	33%	26%	53%	18%	22%	21%
Remained Same	51%	61%	53%	44%	48%	36%	49%	65%	37%	72%	48%	68%
<b>Decreased</b>	46%	39%	47%	10%	4%	8%	18%	9%	11%	10%	30%	11%

# Attitude Towards New Therapies in DME Treatment

Retina specialists would likely to start prescribing Aflibersept forms (PFS, 8 mg). On the other hand, they tend to wait to see their colleagues begin prescribing Brolucizumab and Faricimab.



Significantly higher than others

# Attitude Towards New Therapies in DME Treatment

Retina specialists would likely to start prescribing Aflibersept forms (PFS, 8 mg). On the other hand, they tend to wait to see their colleagues begin prescribing Brolucizumab and Faricimab.

	Aflibersept PFS			Aflibersept 8 mg			Brolucizumab			Faricimab		
	T&R Hosp	City Hosp.	Univ Hosp.	T&R Hosp	City Hosp.	Univ Hosp.	T&R Hosp	City Hosp.	Univ Hosp.	T&R Hosp	City Hosp.	Univ Hosp.
Base	39	23	38	39	23	38	39	23	38	39	23	38
I will start prescribing	90%	70%	97%	79%	41%	84%	67%	27%	34%	54%	13%	53%
I will wait for my colleagues to apply first	10%	26%	3%	18%	59%	16%	28%	64%	63%	44%	78%	47%
I do not consider prescribing	0%	4%	0%	3%	0%	0%	5%	9%	3%	3%	9%	0%

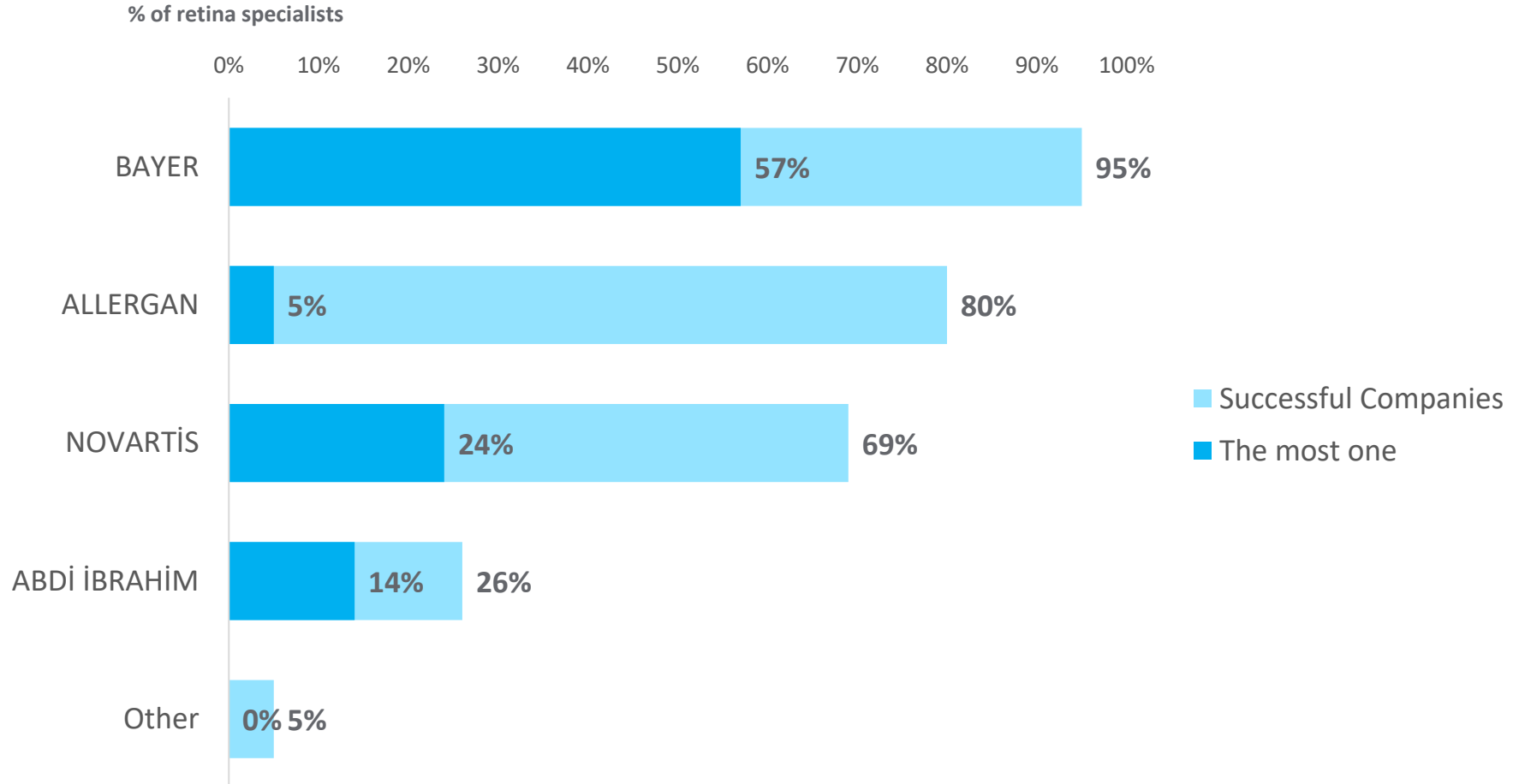




# Company Activities

# Successful Companies

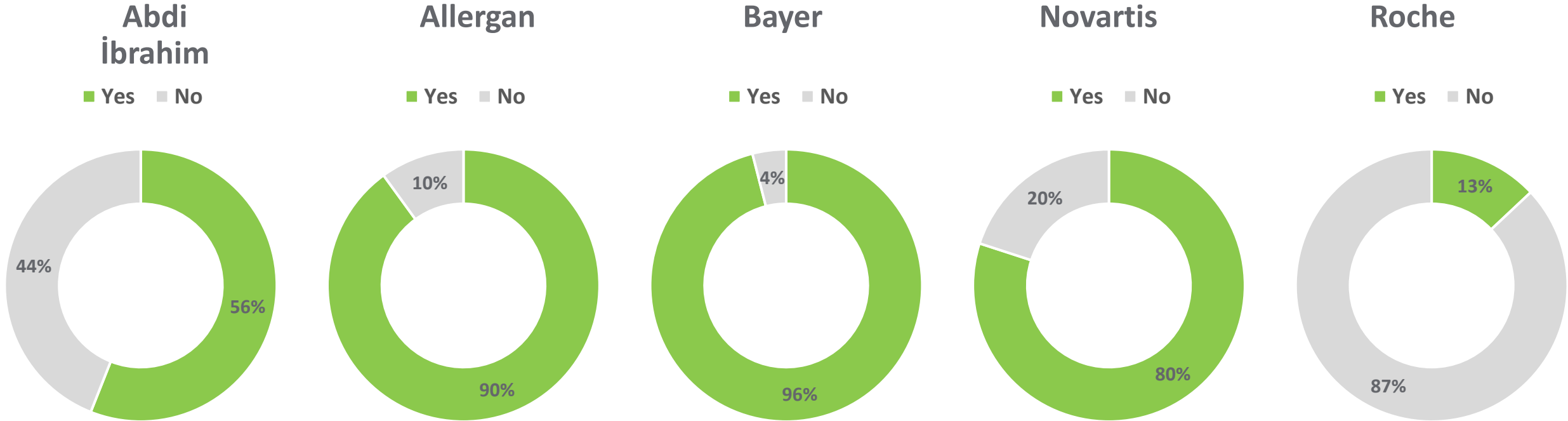
95% of retina specialists view Bayer as a successful company, with 57% of them considering Bayer the most successful company in ophthalmology.



# % of physicians who received F2F visits or Online e-detailing

96% of retina specialists state that they receive F2F visit or e-detailing from BAYER. The rate for Allergan is 90%, and for Novartis, it is 80%.

% of retina specialists



# Visit Frequency

Sales representatives from Bayer, Novartis, and Allergan make contact with retina specialists at least once every two weeks through face-to-face visits or online e-detailing.

	BAYER 100	NOVARTIS 100	ALLERGAN 100	ROCHE 100
<b>% of physicians who received F2F visits or Online e-detailing</b>	<b>96%</b>	<b>80%</b>	<b>90%</b>	<b>13%</b>
Base	96	80	90	13
Once a week	<b>41%</b>	<b>53%</b>	29%	8%
Once every two weeks	<b>39%</b>	30%	<b>48%</b>	<b>38%</b>
Once a month	18%	15%	19%	<b>38%</b>
Less often than once a month	3%	3%	4%	15%

S42. Geçtiğimiz 3 ay içinde intravitreal enjeksiyonlar ile ilgili olarak hangi firmaların tıbbi tanıtım sorumlusundan yüz yüze ya da online tanıtım ziyareti aldınız?

S43. Geçtiğimiz 3 ay içinde intravitreal enjeksiyonlar ile ilgili olarak ziyaret aldığınızı belirttiğiniz firmalardan ne sıklıkla yüz yüze veya online tanıtım aldığınızı söyler misiniz?

Significantly higher than others

# Visit Frequency | BAYER

96% of retina specialists state that they receive F2F visit or e-detailing from BAYER.  
 80% of them receive F2F visits or online e-detailing at least once every two weeks from Bayer's sales representatives, with 41% indicating weekly visits and 39% indicating visits every two weeks.

	TOTAL	T&R Hospitals	City Hospitals	University Hospitals
	100	39	23	38
<b>% of physicians who received F2F visits or Online e-detailing</b>	<b>96%</b>	<b>100%</b>	<b>100%</b>	<b>89%</b>
<b>Base</b>	<b>96</b>	<b>39</b>	<b>23</b>	<b>34</b>
Once a week	41%	<b>38%</b>	<b>65%</b>	26%
Once every two weeks	39%	36%	30%	<b>47%</b>
Once a month	18%	23%	4%	21%
Less often than once a month	3%	3%	0%	6%

**S42.** Geçtiğimiz 3 ay içinde intravitreal enjeksiyonlar ile ilgili olarak hangi firmaların tıbbi tanıtım sorumlusundan yüz yüze ya da online tanıtım ziyareti aldınız?

**S43.** Geçtiğimiz 3 ay içinde intravitreal enjeksiyonlar ile ilgili olarak ziyaret aldığınızı belirttiğiniz firmalardan ne sıklıkla yüz yüze veya online tanıtım aldığınızı söyler misiniz?

Significantly higher than others

# Visit Frequency | NOVARTIS



80% of retina specialists state that they receive F2F visit or e-detailing from BAYER.  
83% of them receive F2F visits or online e-detailing at least once every two weeks from Novartis's sales representatives, with 53% indicating weekly visits and 30% indicating visits every two weeks.

	TOTAL	T&R Hospitals	City Hospitals	University Hospitals
	100	39	23	38
<b>% of physicians who received F2F visits or Online e-detailing</b>	<b>80%</b>	<b>87%</b>	<b>96%</b>	<b>63%</b>
<b>Base</b>	<b>80</b>	<b>34</b>	<b>22</b>	<b>24</b>
Once a week	53%	50%	73%	38%
Once every two weeks	30%	26%	23%	42%
Once a month	15%	21%	5%	17%
Less often than once a month	3%	3%	0%	4%

S42. Geçtiğimiz 3 ay içinde intravitreal enjeksiyonlar ile ilgili olarak hangi firmaların tıbbi tanıtım sorumlusundan yüz yüze ya da online tanıtım ziyareti aldınız?

S43. Geçtiğimiz 3 ay içinde intravitreal enjeksiyonlar ile ilgili olarak ziyaret aldığınızı belirttiğiniz firmalardan ne sıklıkla yüz yüze veya online tanıtım aldığınızı söyler misiniz?

# Visit Frequency | ALLERGAN



90% of retina specialists state that they receive F2F visit or e-detailing from ALLERGAN.  
77% of them receive F2F visits or online e-detailing at least once every two weeks from Allergan's sales representatives, with 29% indicating weekly visits and 48% indicating visits every two weeks.

	TOTAL	T&R Hospitals	City Hospitals	University Hospitals
	100	39	23	38
<b>% of physicians who received F2F visits or Online e-detailing</b>	<b>90%</b>	<b>97%</b>	<b>100%</b>	<b>76%</b>
<b>Base</b>	<b>90</b>	<b>38</b>	<b>23</b>	<b>29</b>
Once a week	29%	24%	<b>48%</b>	21%
Once every two weeks	<b>48%</b>	<b>50%</b>	35%	<b>55%</b>
Once a month	19%	18%	17%	21%
Less often than once a month	4%	8%	0%	3%

S42. Geçtiğimiz 3 ay içinde intravitreal enjeksiyonlar ile ilgili olarak hangi firmaların tıbbi tanıtım sorumlusundan yüz yüze ya da online tanıtım ziyareti aldınız?

S43. Geçtiğimiz 3 ay içinde intravitreal enjeksiyonlar ile ilgili olarak ziyaret aldığınızı belirttiğiniz firmalardan ne sıklıkla yüz yüze veya online tanıtım aldığınızı söyler misiniz?

# Visit Frequency | ROCHE



Only 13% of retina specialists state that they receive F2F visits or online e-detailing from Roche.

	TOTAL	T&R Hospitals	City Hospitals	University Hospitals
	100	39	23	38
<b>% of physicians who received F2F visits or Online e-detailing</b>	<b>13%</b>	<b>5%</b>	<b>35%</b>	<b>8%</b>
<b>Base</b>	<b>13</b>	<b>2</b>	<b>8</b>	<b>3</b>
Once a week	8%	-	-	-
Once every two weeks	38%	-	-	-
Once a month	38%	-	-	-
Less often than once a month	15%	-	-	-

S42. Geçtiğimiz 3 ay içinde intravitreal enjeksiyonlar ile ilgili olarak hangi firmaların tıbbi tanıtım sorumlusundan yüz yüze ya da online tanıtım ziyareti aldınız?

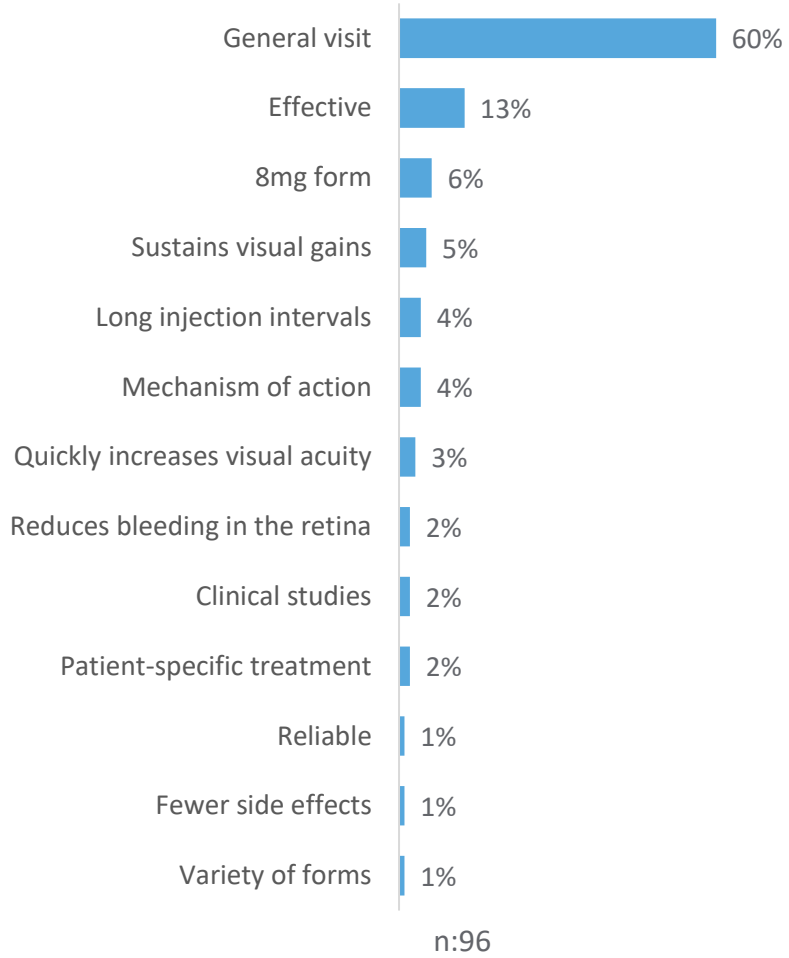
S43. Geçtiğimiz 3 ay içinde intravitreal enjeksiyonlar ile ilgili olarak ziyaret aldığınızı belirttiğiniz firmalardan ne sıklıkla yüz yüze veya online tanıtım aldığınızı söyler misiniz?



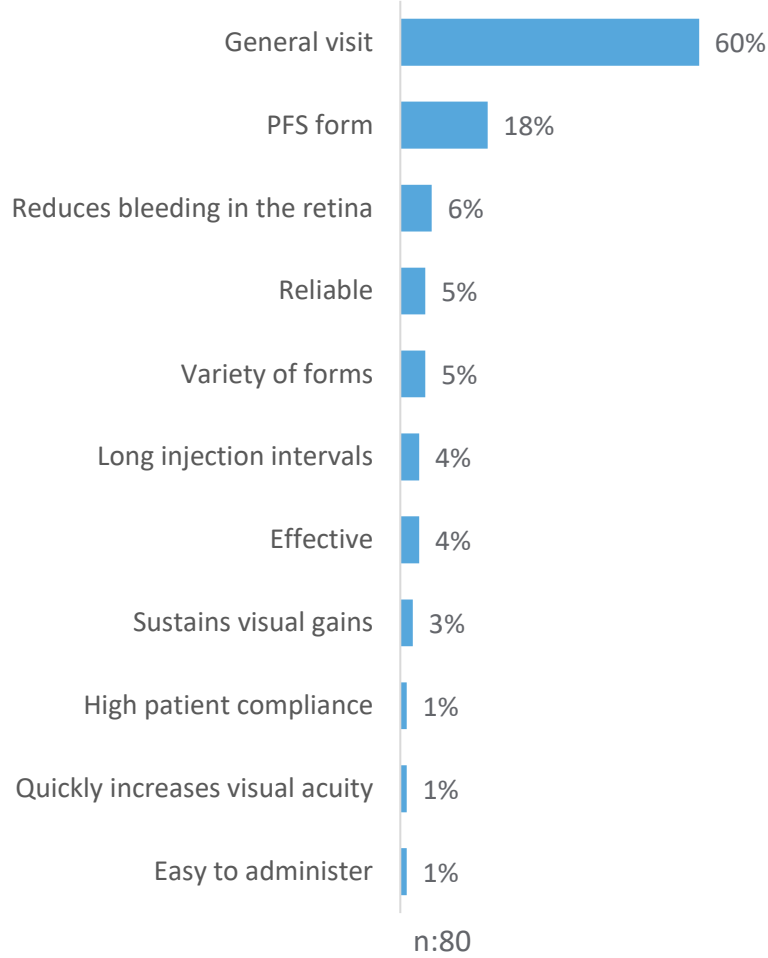
# Spontaneous Message Recall



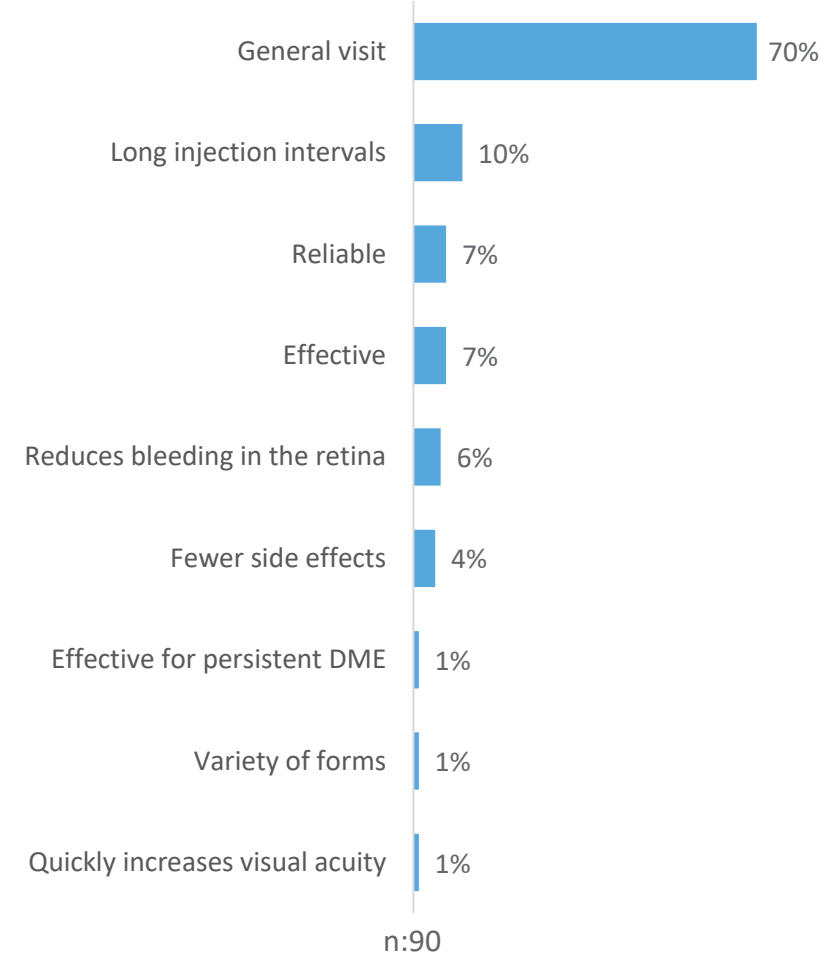
## BAYER



## NOVARTIS



## ALLERGAN



# Aided Message Recall



<b>Message 1:</b> Kişiselleştirilmiş (hastaya özgü) tedavi olanağı	<b>Message 5:</b> nYBMD tedavisinde tedavi et ve uzat rejimiyle 16 haftalık aralığa ulaşabilen tek ilaç
<b>Message 2:</b> PFS formu, diğer onaylı anti-VEGF'den daha güvenli ve hızlıdır	<b>Message 6:</b> Gerçek yaşam verileri randomize klinik çalışmalarla paraleldir
<b>Message 3:</b> VEGF'e bağlanma afinitesi diğer anti-VEGF'lere kıyasla ~100 kat daha fazladır. / VEGF supresyon süresi diğer anti-VEGF'lere göre daha uzundur.	<b>Message 7:</b> Persistan/kronik persistan maküler ödem görülme olasılığı diğer anti-VEGF'lere kıyasla daha düşüktür
<b>Message 4:</b> Diğer anti-VEGF tedavilerin aksine, hem VEGF'e hem de PGF'e bağlanma özelliği ile ikili etki mekanizmasına sahiptir.	<b>Message 8:</b> Başlangıç görme keskinliği 20/40'tan daha düşük olan hastalarda daha üstün etkililik sağlar

	Message 1	Message 2	Message 3	Message 4	Message 5	Message 6	Message 7	Message 8
	100	100	100	100	100	100	100	100
<b>% of physicians who heard the messages</b>	<b>61%</b>	<b>68%</b>	<b>55%</b>	<b>63%</b>	<b>55%</b>	<b>49%</b>	<b>40%</b>	<b>50%</b>
	↓	↓	↓	↓	↓	↓	↓	↓
<b>Product associated with that message</b>	61	68	55	63	55	49	40	50
Bayer / Eylea	<b>89%</b>	26%	<b>47%</b>	<b>73%</b>	<b>64%</b>	<b>63%</b>	20%	<b>70%</b>
Novartis / Lucentis	5%	<b>66%</b>	20%	11%	13%	22%	13%	16%
Allergan / Ozurdex	2%	1%	9%	-	9%	4%	<b>55%</b>	6%
Do not remember	5%	6%	24%	16%	15%	10%	13%	8%

# SR Evaluation

## TOP2 (6+7) % scores



While it's not statistically significant, Bayer's sales representatives seem to be more successful than others.

	BAYER	NOVARTIS	ALLERGAN	ROCHE
	96	80	90	13
Last visit satisfaction	<b>83%</b>	<b>78%</b>	<b>70%</b>	31%
SR's attitudes (response, reliability, politeness, honesty, job passion)	84%	76%	68%	31%
Knowledge about own products and retinal diseases	79%	74%	67%	23%
Understanding clinic and physician's needs, developing solutions	75%	73%	66%	23%



# Recommendations

- ✓ **Focus on DME patients not currently on intravitreal injections to grow the IV market.**
- ✓ **Increase visit frequency**
  - Ensure medical manager involvement.
  - Promote the PFS and 8 mg forms of EYLEA.
- ✓ **Meet physician needs with a variety of print and digital resources.**



**INDEXLAB**  
Market Research  
Report

**THANK YOU**

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