

**A CROSS-MARKET EVALUATION OF WIDE-FIELD RETINAL IMAGING
ADOPTION: CLINICIAN PERCEPTIONS AND SATISFACTION WITH
REMIDIO'S DIAGNOSTIC SOLUTIONS**

Dissertation Submitted to



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Master of Business Administration (MBA)

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Pharmaceutical Management

by

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Under the Supervision and Guidance of

Dr. Sudhinder Singh Chowhan

2025



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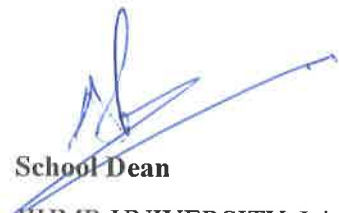
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DECLARATION BY STUDENT

I, Amiya Kumar Palauri, Enrolment No. IIHMR-U/02/2023-25/0477 hereby declare that this dissertation titled **“A Cross-Market Evaluation of Wide-Field Retinal Imaging Adoption: Clinician Perceptions and Satisfaction with Remidio’s Diagnostic Solutions”** the bonafide record of my original research work. I declare that it has not been submitted to any other University or institution for the award of any degree of diploma. Information derived from the published or unpublished work of other as been duly acknowledged in the text.

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Table of Abbreviations

Abbreviation	Full Form
WFI	Wide-Field Imaging / Wide-Field Retinal Imaging
EMR	Electronic Medical Record
ROI	Return on Investment
AMC	Annual Maintenance Contract
AI	Artificial Intelligence
KOL	Key Opinion Leader
NM FOP	Non-Mydriatic Fundus on Phone
LMICs	Low- and Middle-Income Countries
SERVQUAL	Service Quality Model
IIHMR	Indian Institute of Health Management Research
MBA	Master of Business Administration
USD	United States Dollar
IRB	Institutional Review Board
NGO	Non-Governmental Organization

Table of Definitions

Term	Definition
Wide-Field Imaging (WFI)	Advanced ophthalmic imaging system designed to capture high-resolution digital images of a large portion of the retina in a single shot, imaging systems capable of capturing >100° of the retina.
Metro	Delhi, Chennai, Mumbai
Semi Metro	Ahmedabad, Bangalore, Hyderabad, Pune
Tier 1	Bhubaneswar, Chandigarh, Gurugram, Indore, Jaipur, Kanpur, Lucknow, Surat, Vishakhapatnam
Tier 2	Agra, Asansol, Bathinda, Belgaum, Bharatpur, Bikaner, Faridabad, Ghaziabad, Gulbarga, Guntur, Jalandhar, Jamshedpur, Kollam, Kota, Mangalore, Meerut, Patiala, Pondicherry, Ranchi, Sanghi, Thanjavur, Thiruvananthapuram, Trichy, Vadodara, Varanasi, Vijayawada
Tier 3	Nagercoil, Palampur, Patan, Ponda, Sambalpur, Sikar, Sirohi, Sultanpur, Vadakara, Bolpur, Chaibasa, Cheyyar, Chikli, Chikkaballapur, Elanpillai, Guna, Hardoi, Jorhat.

Abstract

Title:

A Cross-Market Evaluation of Wide-Field Retinal Imaging Adoption: Clinician Perceptions and Satisfaction with Remidio's Diagnostic Solutions

Author's Name:

Amiya Kumar Palauri

Keywords

Wide-field retinal imaging, ophthalmology, Remidio, medical device adoption, clinician satisfaction, portable diagnostics, teleophthalmology, emerging markets, healthcare technology, user perception, retinal diagnostics, image quality, cost-effectiveness, service quality, India.

Background:

Retinal diseases are a growing global health concern, particularly in emerging markets where access to specialized care is limited. Wide-field retinal imaging (WFI) technologies, especially those that are portable and cost-effective, have the potential to bridge diagnostic gaps in such settings. Remidio Innovative Solutions Pvt. Ltd. has developed smartphone-integrated WFI devices tailored for these markets. Despite their promise, the extent of their adoption and user satisfaction across India remains underexplored.

Objective:

This study aimed to evaluate clinician perceptions, satisfaction levels, and usage patterns regarding Remidio's wide-field imaging solutions across various clinical geographies in India. It also sought to identify product feature priorities, assess service delivery quality, and compare brand competitiveness relative to market peers.

Results/Findings:

Data from 100 ophthalmologists across metro, semi-metro, Tier 2, and Tier 3 cities revealed tier-specific adoption drivers. Metro-based retina specialists valued image quality and diagnostic performance, while general ophthalmologists in smaller cities prioritized ease of use, portability, and affordability. Remidio scored highly on field of view (~4.8/5), image quality (~4.7/5), and ease of use (~4.2/5).

However, gaps were identified in EMR integration and Tier 3 service responsiveness. Commercially, after-sales service, pricing, and payback periods significantly influenced brand loyalty. Awareness was high nationwide, with mid-career doctors (5–10 years of experience) emerging as the most satisfied and advocacy-prone segment.

Conclusion:

Remidio's WFI solutions align well with clinicians' core diagnostic needs and provide strong value in emerging markets. However, satisfaction levels vary by geography and practitioner experience, indicating the need for tiered strategies. Enhancements in service infrastructure, targeted commercial offers, and onboarding support in Tier 3 cities are necessary to drive deeper adoption.

Chapter 1

Introduction

In the near future, the field of ophthalmic diagnostics is expected to witness accelerated adoption of high-resolution imaging modalities, particularly in the detection and management of retinal diseases. One of the most transformative technologies in this domain will be Wide-Field Retinal Imaging (WFI). As the burden of retinal pathologies continues to grow globally, especially in emerging markets, the demand for advanced diagnostic tools that can enable early detection and effective monitoring is poised to increase substantially. Our research will aim to explore this landscape, with specific attention to how clinicians perceive and interact with WFI technologies, especially solutions offered by Remidio Innovative Solutions Pvt. Ltd.

Wide-field retinal imaging will represent a significant advancement over traditional fundus photography. Whereas conventional imaging captures only 30° to 50° of the retina, WFI systems can visualize up to 100° to 200° in a single scan. This comprehensive coverage will enable ophthalmologists to detect peripheral retinal lesions, diabetic retinopathy, retinal detachment, and other critical pathologies much earlier than is currently possible. These capabilities will be especially important in low- and middle-income countries (LMICs), where patient access to specialty care is limited, and one-time comprehensive screening can significantly improve outcomes.

The global market for WFI is anticipated to grow rapidly over the next decade. According to MarketsandMarkets (2023), the WFI market is projected to exceed USD 1.5 billion by 2030, driven by rising prevalence of diabetic eye diseases, increasing geriatric population, growing awareness, and technological advancements. Emerging markets such as India, Southeast Asia, Africa, and Latin America will play a pivotal role in this growth due to the increasing demand for portable, cost-effective diagnostic tools. However, despite its potential, WFI adoption will likely face barriers such as high device costs, lack of trained personnel, infrastructure constraints, and limited awareness among general ophthalmologists.

Remidio Innovative Solutions Pvt. Ltd. will emerge as a key player poised to address these very challenges. A medical device company headquartered in India, Remidio will focus on building affordable, portable, and user-friendly ophthalmic imaging devices that cater to the specific needs of emerging markets. One of its flagship offerings will be the "Remidio

Non-Mydriatic Fundus on Phone (NM FOP)" and its wide-field imaging solution, which combines advanced optics with smartphone-based technology to deliver high-resolution, wide-angle retinal images. This solution will allow eye care professionals in both urban and remote settings to conduct detailed retinal examinations without requiring dilated pupils or expensive infrastructure.

Despite the promise of wide-field retinal imaging, there continues to be a significant gap in its adoption, especially in low-resource settings. The availability of advanced diagnostic imaging in India, Southeast Asia, and Sub-Saharan Africa remains highly uneven. While private hospitals in metro cities may be equipped with the latest imaging systems, smaller clinics and government facilities often lack both the equipment and the technical staff to operate them.

The cost of high-end WFI devices remains a major barrier. Imported systems from global manufacturers are typically priced beyond the reach of small practices. Additionally, many ophthalmologists in these regions are not trained to operate sophisticated imaging systems or interpret their results. These challenges are compounded by unreliable after-sales support, difficulty in accessing spare parts, and a general lack of digital infrastructure.

Unlike traditional WFI systems offered by global giants such as Zeiss or Optos, which are often bulky and expensive, Remidio's WFI will offer a compact, plug-and-play solution. This will not only reduce the total cost of ownership but also enable its use in mobile eye camps, rural outreach programs, and standalone private clinics that lack large-scale ophthalmic setups. The device will provide seamless digital capture, cloud-based storage options, and compatibility with AI-based diagnostic platforms—offering clinicians a futuristic yet practical solution.

Remidio's innovation in developing compact, cost-effective, and easy-to-use devices presents a unique opportunity to address this access gap. However, to ensure successful scale-up and market penetration, it is essential to evaluate the end-user experience. What do ophthalmologists value most in such devices? What concerns hinder adoption? What features do they consider critical versus optional? This research will aim to answer these questions systematically.

Purpose of the Study

Our proposed research will investigate how ophthalmologists in various regions and tiers of clinical infrastructure perceive the usefulness, reliability, and value of Remidio's wide-field imaging solution. We will analyze key product features such as field of view, image quality, ease of use, portability, and integration with electronic medical records (EMRs). We will also explore how these perceptions vary by years of clinical experience, type of practice (private, institutional), and geographic location (metro, semi-metro, Tier 2, Tier 3).

This study will be crucial for guiding strategic decisions related to product positioning, pricing, training, and service models. By capturing clinician voices directly, the research will help Remidio identify opportunities to further improve product design, prioritize feature upgrades, and enhance its go-to-market approach. Moreover, it will offer broader insights into how WFI technologies can be scaled across diverse healthcare ecosystems, thereby contributing to the larger goal of universal eye health coverage.

Our hypothesis will be that while advanced clinical users in metro cities will value diagnostic depth (image quality, field of view), clinicians in semi-urban and rural areas will prioritize portability, cost-effectiveness, and ease of operation. We also anticipate that after-sales service, training support, and financing options will emerge as decisive factors influencing adoption.

Ultimately, this research will serve as a bridge between technological innovation and practical clinical application. It will generate actionable intelligence not only for Remidio but also for policymakers, NGOs, and other stakeholders invested in strengthening eye care delivery in resource-constrained settings. In doing so, it will lay the foundation for future advancements in equitable and scalable retinal imaging solutions.

Chapter 2

Literature review

1. Clinical Value and Market Trends of WFI

Wide-field retinal imaging (WFI) has significantly advanced the field of ophthalmology by allowing clinicians to capture detailed images of the retina, including the peripheral areas that traditional fundus cameras often miss. This expanded view helps in the early detection and better management of conditions such as diabetic retinopathy, retinal tears, and vascular disorders. As highlighted by Choudhry et al. (2019), WFI plays a crucial role in mass screening programs, which is especially important in countries like India, where the prevalence of diabetes and related eye diseases is high.

From a market perspective, reports by MarketsandMarkets and Grand View Research indicate strong growth prospects for WFI technology, with global revenues projected to exceed USD 1.5 billion by 2030. This growth is driven by a combination of factors — increasing incidence of retinal diseases worldwide, greater awareness among eye care professionals, and continuous technological improvements that have made devices more portable and affordable. Emerging markets, particularly India, stand out as key growth areas due to rising healthcare investments and a large, underserved patient population.

Key takeaways:

- WFI enhances diagnostic capabilities by imaging beyond the central retina, improving disease detection.
- Market growth is fueled by disease burden, innovation, and demand for efficient screening solutions.

2. Barriers and Facilitators to WFI Adoption in Emerging Markets

Despite its clear clinical benefits, the adoption of WFI technology in low- and middle-income countries (LMICs) faces several challenges. Studies by Vashist et al. (2012) and Sivaprasad et al. (2020) point to barriers such as the high cost of devices, limited healthcare infrastructure, and a shortage of trained personnel capable of operating advanced equipment. These obstacles are often magnified in rural and semi-urban areas where access to specialist ophthalmic services is scarce.

On the other hand, there are positive developments that help overcome these hurdles. Government-led screening programs and the integration of telemedicine services are crucial facilitators. Importantly, the introduction of portable, user-friendly devices — like Remidio’s smartphone-based wide-field imaging systems — has opened new avenues for widespread adoption. Their ease of use, minimal training requirements, and ability to transmit images remotely make them well suited to resource-limited settings, bringing quality retinal care closer to underserved populations.

Key takeaways:

- Cost, training, and infrastructure limitations remain key barriers in LMICs.
- Portable devices and telemedicine support play a vital role in increasing access and adoption.

3. Comparative Studies: Remidio vs. Competing Devices

Several validation studies have established that Remidio’s Fundus on Phone (FOP) delivers image quality comparable to that of traditional, bulky fundus cameras, but with distinct advantages in portability and affordability (Rajalakshmi et al., 2015).

Compared to global competitors like Optos, which provide high-end but expensive systems, Remidio’s devices are designed with the specific needs of the Indian market in mind. Silva et al. (2015) emphasize that this localized innovation approach makes Remidio particularly well-suited for both urban tertiary hospitals and rural outreach programs.

The smartphone integration and battery-powered operation of Remidio devices provide flexibility in various clinical environments. Feedback from ophthalmologists underscores the value of these features, especially the ability to deploy the technology easily in settings lacking extensive infrastructure.

Key takeaways:

- Remidio’s clinical image quality is well validated.
- Its portability and affordability offer a clear advantage over many global brands.

4. User Satisfaction, Service Quality, and Brand Trust

Customer satisfaction in adopting medical devices depends on multiple factors — not just product performance but also the quality of after-sales service, training, and the

reputation of the brand. Research by Holden et al. (2017) and Garg et al. (2021) underscores that a user-centric design, coupled with responsive technical support, is essential in building clinician loyalty. The SERVQUAL model (Parasuraman et al., 1988) highlights important dimensions such as reliability, assurance, and empathy in service delivery.

Ophthalmologists frequently point out that prompt and effective technical assistance, thorough training, and clear communication strongly influence their satisfaction with WFI devices. Remidio's focus on these aspects has earned positive feedback, though users also express the desire for continual device upgrades and improved service infrastructure to keep pace with evolving needs.

Key takeaways:

- Strong after-sales support and user-friendly design are critical for high satisfaction.
- Trust in the brand and quality service encourages repurchase and recommendations.

5. Future Directions: AI, Telemedicine, and Innovation

The future of WFI lies in integrating advanced technologies like artificial intelligence (AI) and teleophthalmology. AI-powered image analysis, as noted by Ting et al. (2019), has the potential to enhance the speed and accuracy of screening and diagnosis, reducing clinician workload.

Meanwhile, Rathi et al. (2017) emphasize the growing importance of seamless compatibility with telemedicine platforms, electronic health records, and automated reporting systems. Remidio's ongoing efforts to embed AI capabilities and improve digital connectivity will be key to maintaining its competitive edge. Meeting these technological expectations is crucial as ophthalmologists increasingly demand devices that support remote consultations and efficient data management.

Key takeaways:

- AI integration and telemedicine compatibility are becoming standard expectations.
- Continuous innovation is vital to meet future clinical and operational demands.

Table 2.1

Sl No	Author(s)	Article Link	Study Technique	Study Year	Key Takeaway
1	Choudhry et al.	https://doi.org/10.1016/j.survophthal.2018.12.002	Literature review & clinical synthesis	2019	WFI improves peripheral imaging, vital for mass screening in diabetes-prone countries.
2	Vashist et al.	https://doi.org/10.4103/0301-4738.100542	Barrier analysis in developing countries	2012	Cost, training gaps, and infrastructure remain adoption barriers in LMICs.
3	Sivaprasad et al.	https://doi.org/10.1038/s41433-019-0632-8	Implementation review in India	2020	Telemedicine and portable imaging devices are adoption enablers.
4	Rajalakshmi et al.	https://doi.org/10.1371/journal.pone.0138285	Validation study (FOP vs traditional)	2015	Smartphone-based imaging provides comparable image quality to standard fundus cameras.
5	Silva et al.	https://doi.org/10.1016/j.ophtha.2014.09.024	Comparative imaging study	2015	Emphasized practical value of Remidio over traditional bulky devices.
6	Holden et al.	https://doi.org/10.9745/GHSP-D-17-00012	Field/user feedback in LMICs	2017	User-centric design matters for adoption in low-resource environments.
7	Garg et al.	https://doi.org/10.4103/ijmr.IJMR_1234_20	Survey of Indian ophthalmologists	2021	Brand trust, service, and usability are key drivers of satisfaction.
8	Ting et al.	https://doi.org/10.1136/bjophthalmol-2018-313173	Technical review	2019	AI enhances diagnostic efficiency and lowers clinician workload.
9	Rathi et al.	https://doi.org/10.1016/j.ophtha.2017.05.006	Review on teleophthalmology	2017	Future devices must support telehealth and data interoperability.

Chapter 3

Material and Methodology

1. Methodology

The research will follow a descriptive and exploratory mixed-methods approach. It will involve primary data collection through structured surveys and semi-structured telephonic interviews with ophthalmologists who currently use or are familiar with Remidio's wide-field imaging devices or similar devices. The survey will be designed to capture both quantitative and qualitative insights, including ratings on product features and open-ended responses regarding user experiences and expectations.

The methodology will ensure representation from multiple practice types, including private clinics, standalone hospitals, and large institutions. It will also cover various geographic locations, such as metro cities, semi-urban zones, and Tier 2/3 towns. A purposive sampling technique will be adopted to select clinicians with direct experience in retinal diagnostics. Data will be anonymized and analyzed using descriptive statistics and thematic analysis to derive patterns and correlations.

2. Research Questions

1. Can you share your clinical background, experience, and current practice setting (including city and number of procedures conducted monthly)?
2. Which Remidio devices do you currently use, and how frequently do you use each?
3. How did you first hear about Remidio and what is your level of awareness of the brand compared to competitors?
4. Which three features do you most like and least like about the Remidio product(s) you use?
5. What improvements or new features would you suggest for each Remidio product you use?
6. How would you describe Remidio's brand attributes in terms of top-of-mind associations, personality, and competitive differentiation?
7. How would you compare Remidio to its top competitors on innovation, reliability, effectiveness, and performance?

8. What are the main strengths and weaknesses of Remidio when compared to its competitors across product, service, and value?
9. Have you faced any product performance issues with Remidio devices? If so, please describe them.
10. What makes Remidio stand out from competitors, and what would make you switch to a competing brand?
11. How intuitive and user-friendly do you find Remidio's devices in terms of design, ergonomics, and portability?
12. What are your expectations for future innovation from Remidio in areas like AI, automation, and telemedicine compatibility?
13. How would you rate the price-to-value ratio of Remidio devices, and does it meet your expectations for ROI and cost-effectiveness?
14. Would you consider switching brands for better pricing or efficiency benefits for patients? Why or why not?
15. How would you rate Remidio's customer service and technical support, including timeliness of service engineers and responsiveness?
16. How has your installation and post-sales service experience been with Remidio products?
17. How important are product-specific factors like image quality, robustness, ease of use, and integration? Please rank them by priority.
18. How would you rate Remidio and its competitors on key product parameters such as digital features, operating cost, and specifications?
19. How important are commercial terms such as price, discounts, financing options, and payback period when choosing a device?
20. How do Remidio and its competitors perform on those commercial aspects (e.g., price, trade-in value, financing)?
21. What role do pre- and post-sales service factors (e.g., local presence, cost of service, follow-ups) play in your brand evaluation?

22. What is your level of satisfaction with Remidio's overall offering, and would you consider repurchasing or recommending it?
23. On a scale of 1 to 10, how much do you trust the Remidio brand and its future product introductions?
24. Who are the key decision-makers and influencers in your organization when purchasing ophthalmic devices, and what factors drive their decision-making?

3. Objectives

The objectives of this research will define its purpose and scope. They will guide the entire research framework, ensuring that each phase of the study contributes towards answering meaningful, actionable inquiries. The necessity of these objectives lies in their role in transforming raw data into business and clinical insights.

1. **Understand User Demographics and Clinical Context**, to profile the background, experience, specialization, and practice settings of ophthalmologists using or aware of Remidio's wide-field imaging devices.
2. **Assess Product Usage and Awareness**, to evaluate the level of awareness, frequency of use, and familiarity with various Remidio products among clinicians.
3. **Identify Perceived Strengths and Areas for Improvement**, to determine the most and least appreciated product features from the user's perspective, and gather suggestions for feature enhancements.
4. **Evaluate Brand Perception and Competitive Positioning**, to explore how clinicians perceive Remidio in terms of innovation, reliability, and affordability compared to top competitors.
5. **Measure User Satisfaction and Trust**, to assess satisfaction with Remidio's devices across functional parameters such as ease of use, image quality, ergonomics, and service support.
6. **Gauge Commercial Sensitivity and Price-Value Expectations**, to understand how clinicians evaluate pricing, ROI, financing options, and trade-in programs when considering a purchase.
7. **Analyze the Impact of Service and Support on Buying Decisions**, to evaluate how pre- and post-sales service quality, local support presence, and installation experience affect brand perception and loyalty.

8. **Uncover Future Expectations from Product Innovation**, to gather insights into user expectations for upcoming features like AI integration, automation, and telemedicine compatibility.
9. **Benchmark Remidio Against Competitors**, to compare Remidio's performance on key clinical and commercial parameters relative to competing brands in the market.
10. **Explore Repurchase Intent and Brand Advocacy**, to determine the likelihood of repurchase and recommendation, as well as the overall trust in Remidio's brand and product roadmap.
11. **Understand Buying Dynamics Within Institutions** to identify key decision-makers and influencing factors in institutional procurement processes for ophthalmic diagnostic equipment.

By fulfilling these objectives, the study will contribute to evidence-based decision-making for Remidio. It will also provide academic and policy stakeholders with a model for assessing medical technology adoption in emerging markets. Each objective is designed not only to answer a critical question but also to deliver recommendations that improve healthcare delivery and technology accessibility on the ground.

4. Hypothesis

1. **H1: Product feature priorities vary significantly by city tier.**
Clinicians in metro cities will prioritize technical specifications like image quality and EMR integration, while those in Tier 2 and 3 cities will prioritize portability, ease of use, and cost-effectiveness.
2. **H2: Years of clinical experience influence satisfaction and expectations.**
Senior clinicians (10+ years of experience) will report higher expectations for advanced features like AI and automation, while younger clinicians will be more focused on usability and value for money.
3. **H3: Customer service and post-sales support are major determinants of repurchase intent.**
Clinicians who report high satisfaction with Remidio's service experience will show a stronger intent to repurchase or recommend the brand.
4. **H4: Competitive pricing and financing flexibility drive brand switching.**
Respondents who perceive lower price-to-value ratios or limited financing options will be more likely to consider switching to a competing brand.

5. **H5: Brand trust is positively correlated with product satisfaction.**

Higher overall satisfaction with device features and service will correlate strongly with a higher trust rating and likelihood to recommend Remidio.

6. **H6: Purchase decisions are driven more by clinical performance than commercial terms.**

Clinicians will prioritize diagnostic capabilities (image clarity, field of view) over price and payback period when selecting a device.

5. Study Tools

The primary tool for this study will be a structured questionnaire consisting of both closed-ended and open-ended items. It will include:

- Likert-scale ratings on product-specific parameters (image quality, ease of use, field of view, etc.)
- Ranking of commercial parameters (price, warranty, financing, etc.)
- Feedback on service parameters (installation, responsiveness, spares availability)
- Open-ended questions on suggestions for product improvement

The questionnaire will be distributed via online survey platforms and supplemented with telephonic interviews for additional insights.

6. Duration of the Study

The entire research project is expected to be completed over a span of ten weeks:

Week 1-2: Survey design, finalization of respondent list

Weeks 3-7: Data collection (surveys + interviews)

Weeks 8-9: Data analysis and validation

Week 10: Report writing and presentation of findings

7. Sample Size

The proposed sample size will be 100 ophthalmologists drawn from different regions in India. Though diverse sampling, the sample will be purposively selected to ensure diversity in specialization, experience level, and type of clinical setting. This focused group will provide deep insights into user perceptions and experiences.

8. Sampling Techniques

A purposive sampling method will be used to recruit respondents who are already familiar with or currently using wide-field imaging devices from Remidio or any other

competitor. This approach will ensure that the data collected is rich, relevant, and directly applicable to the research objectives.

9. Data Collection Procedure

Data will be collected through:

- Online surveys disseminated via email and professional networks
- Follow-up telephone interviews for clarification and qualitative depth
- All responses will be recorded digitally and stored securely for analysis

Anonymity and confidentiality of respondents will be strictly maintained.

10. Data Analysis Plan

The data analysis process for this study was grounded in a structured survey format, capturing both quantitative and qualitative inputs from ophthalmologists. The dataset includes responses, encompassing clinician demographics, device usage patterns, satisfaction ratings, and feature preferences. The nature of the data primarily categorical, ordinal, and binary—necessitated the use of descriptive statistical methods. Frequency distributions and cross-tabulations were likely to summarize responses, such as the number of clinicians who found certain device features satisfactory, or the distribution of satisfaction levels across different tiers of clinical experience and geographic locations.

To prioritize user needs and preferences, Likert-scale ratings and ranking-based questions were analyzed to compute average scores and weighted importance. These results were then visualized using heatmaps and priority matrices tools effective in comparing multiple variables simultaneously across respondent segments. For instance, satisfaction with image quality or after-sales support could be cross-referenced with years of experience or practice setting to uncover patterns. Cross-segment analysis, particularly across metro vs. non-metro locations and among varying experience levels, was instrumental in identifying the key factors driving adoption and satisfaction.

11. Ethical Considerations

This study will follow strict ethical guidelines, including:

- Informed consent from all participants
- Voluntary participation with the option to withdraw at any time
- Anonymization of data to protect participant identities
- No collection of patient or clinical records, thus not requiring IRB approval.

12. Implications of Research

The research is expected to generate valuable insights into clinician needs, preferences, and pain points related to wide-field imaging. For Remidio, it will provide a roadmap for:

- Enhancing product features based on user feedback
- Customizing marketing and service strategies by city tier
- Improving training, onboarding, and after-sales experience

At a broader level, the findings will help inform policy recommendations for increasing access to advanced eye care in underserved regions.

Chapter 4

Data analysis and Interpretation

Specialty Distribution

The dataset includes 100 surgeons from ophthalmologist specialties.

- Ophthalmologists (General)
- Retinal Specialist
- Cataract Surgeon

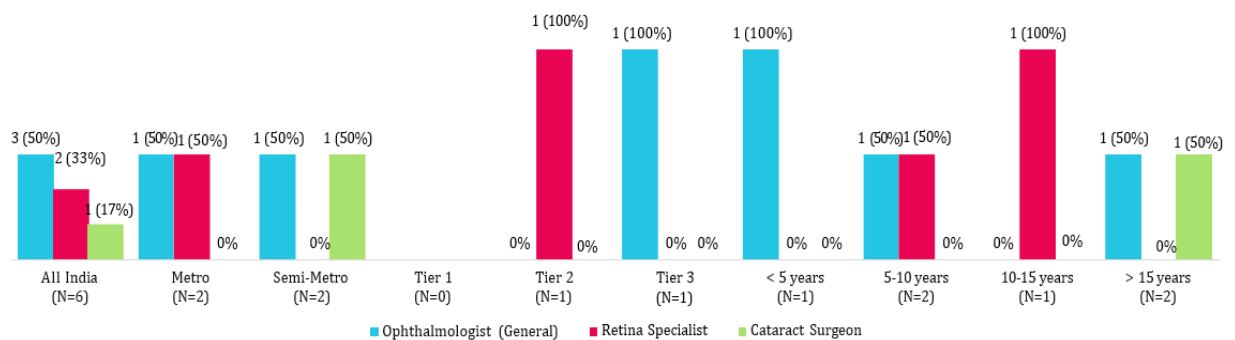
The variation in the study's design ensured that the findings accurately reflected the broader Specialty, facilitating comparisons across various Ophthalmological practices.

1. Clinical Demographics

Specialization by City Tier

The majority (50%) of respondents are retina specialists, predominantly located in metro cities, while Tier 2 and Tier 3 cities are served mainly by general ophthalmologists. This indicates that Remidio's wide-field imaging aligns well with metro-based retina specialists. However, for lower-tier cities, product messaging should emphasize versatility and ease of use to appeal to generalists.

Fig 4.1.1

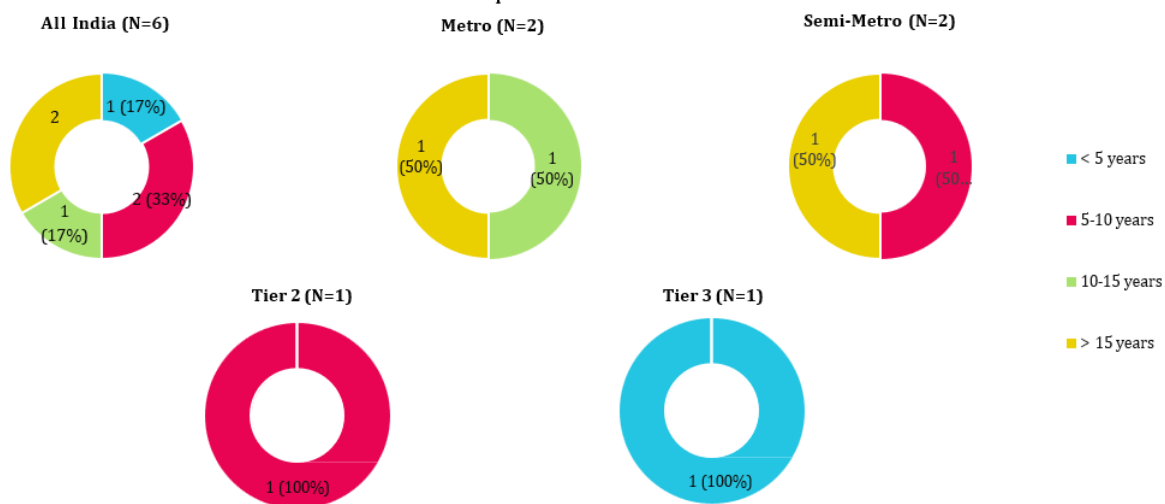


Experience Levels

Most respondents (67%) have over 10 years of clinical experience, highlighting Remidio's strong traction among seasoned practitioners. **Early Career Professionals are Few (17%)** Indicates that initial product awareness may need to start at postgraduate institutions to capture young users early. **Senior Experts are Key Influencers** with 33% being senior experts, they are likely decision-makers and should

be leveraged for advocacy or KOL roles. The underrepresentation of early-career doctors suggests an opportunity for targeted outreach through training programs or early-access schemes.

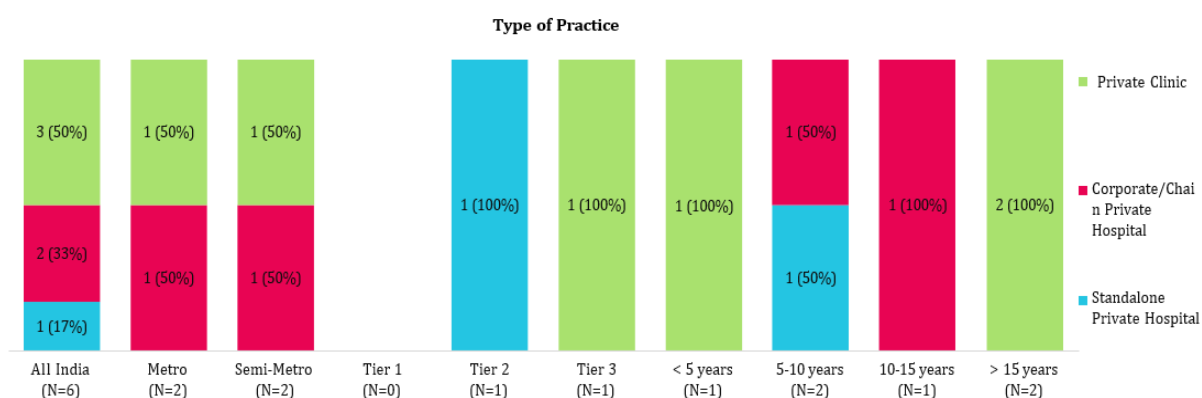
Fig 4.1.2



Practice Type

Metro respondents are largely affiliated with institutional setups, while Tier 2 and 3 doctors operate primarily in standalone clinics. This suggests the need for a dual sales strategy—solution-driven engagement for institutions and ROI-focused messaging for smaller clinics.

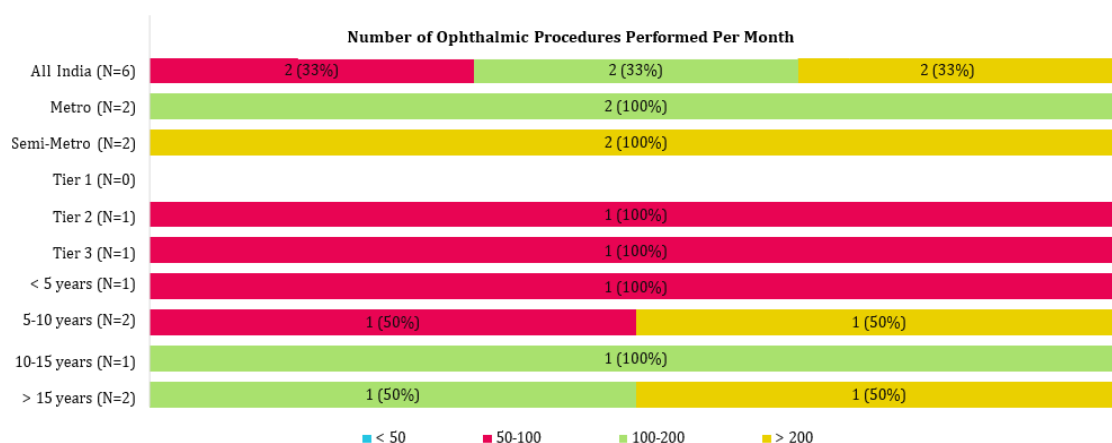
Fig 4.1.3



Monthly Procedure Volume

Metro-based and senior doctors report high procedure volumes (100–200+/month), while those in Tier 2 and 3 cities perform fewer than 100 procedures. A tiered product offering—premium features for high-volume users and affordable options for smaller practices—would support adoption across segments. Strategic Focus for Remidio – Targeting high-volume practitioners for premium models, while offering scalable/affordable solutions for smaller setups would be beneficial.

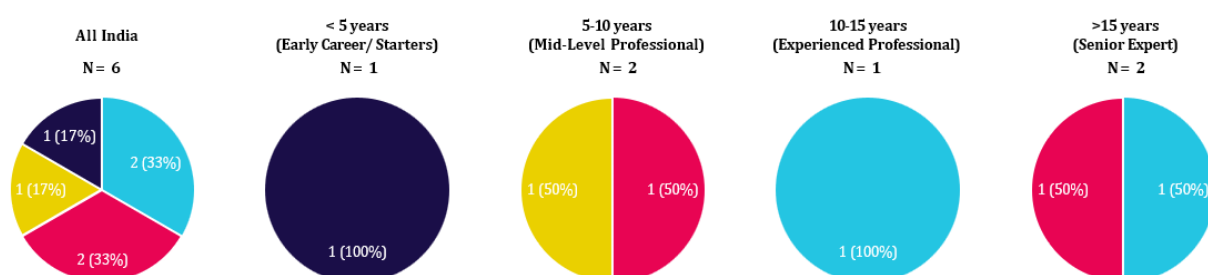
Fig 4.1.4



City-Wise Experience Distribution

Metro doctors are highly experienced (>15 years), while Tier 2 and 3 respondents are mid-career or early-career professionals. This reflects varying readiness levels. Metros can drive innovation adoption, while lower-tier cities require support models focused on onboarding and affordability.

Fig 4.1.5



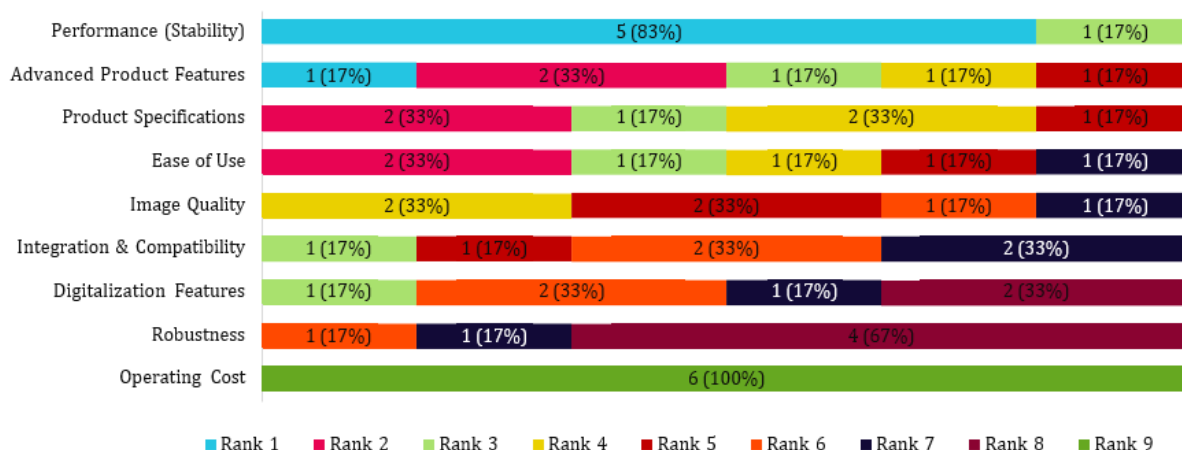
2. Product Specific Parameters

Among product-specific parameters, **Field of View** stands out as the top priority for clinicians, with an average importance score of ~2.0, underscoring the need for Remidio to emphasize its wide-field imaging capabilities in its value proposition.

Image Quality and **Ease of Use**, scoring between ~2.2–2.5, are also highly valued, reflecting clinicians’ focus on diagnostic efficiency and seamless workflow integration.

In contrast, **EMR integration**, with a score of ~6.0, is seen as less critical, likely due to limited digital adoption across clinics. Strategically, Remidio should highlight its strengths in Field of View, Image Quality, and Ease of Use, while positioning integration and portability as secondary features tailored to specific market segments.

Fig 4.2.1



Product Specific Parameters by type of city

City-tier analysis shows metro doctors prioritize Field of View and Image Quality, while Tier 2 and 3 respondents value Ease of Use and Portability more—highlighting operational limitations in smaller setups. Portability, in particular, becomes increasingly important in lower-tier cities and among younger practitioners, often involved in multi-location or outreach practices.

Table 4.2.1

Factors	All India	Rank	Metro	Rank	Semi - Metro	Rank	Tier 1	Rank	Tier 2	Rank	Tier 3	Rank
Base	N=6		N=2		N=2		N=0		N=1		N=1	
Performance (Stability)	1.33	1	2.00	1	1.00	1	-	-	1.00	1	1.00	1
Advanced Product Features	2.83	2	2.00	2	2.00	2	-	-	4.00	4	5.00	5
Product Specifications	3.33	3	2.00	3	3.50	3	-	-	5.00	5	4.00	4
Ease of Use	3.83	4	6.00	5	3.50	4	-	-	2.00	2	2.00	2
Image Quality	5.17	5	4.00	4	5.00	5	-	-	7.00	7	6.00	6
Integration & Compatibility	5.67	6	6.00	6	6.50	6	-	-	6.00	6	3.00	3
Digitalization Features	6.33	7	6.00	7	7.50	8	-	-	3.00	3	8.00	8
Robustness	7.50	8	8.00	8	7.00	7	-	-	8.00	8	7.00	7
Operating Cost	9.00	9	9.00	9	9.00	9	-	-	9.00	9	9.00	9

Product Specific Parameters by year of experience

Experience-based trends align with this: early-career doctors prefer intuitive, portable systems; mid-career professionals begin to value integration as practices expand; and seasoned experts focus again on imaging depth and diagnostic range. Performance ratings mirror these preferences—Remidio scores highest in Field of View and Image Quality (~4.5–4.8/5), with decent Ease of Use (~4.2), while Integration remains a lagging feature (~3.0–3.9).

Table 4.2.2

Factors	All India	Rank	< 5 years	Rank	5 – 10 years	Rank	10 – 15 years	Rank	> 15 years	Rank
Base	N=6		N=1		N=2		N=1		N=2	
Performance (Stability)	1.33	1	1.00	1	1.00	1	1.00	1	2.00	2
Advanced Product Features	2.83	2	5.00	5	3.00	3	3.00	3	1.50	1
Product Specifications	3.33	3	4.00	4	4.50	4	2.00	2	2.50	3
Ease of Use	3.83	4	2.00	2	2.50	2	5.00	5	5.50	5
Image Quality	5.17	5	6.00	6	6.00	6	4.00	4	4.50	4
Integration & Compatibility	5.67	6	3.00	3	6.50	7	7.00	7	5.50	6
Digitalization Features	6.33	7	8.00	8	5.50	5	6.00	6	6.50	7
Robustness	7.50	8	7.00	7	7.00	8	8.00	8	8.00	8
Operating Cost	9.00	9	9.00	9	9.00	9	9.00	9	9.00	9

Product Specific Parameters by performance of company

Remidio performs strongly on parameters that matter most to clinicians. It scores above 4.5/5 in Field of View and Image Quality—directly aligning with top-ranked priorities. Ease of Use also receives a solid score (~4.2), indicating broad usability across user groups. However, EMR Integration scores lower (~3.2), consistent with its low importance in decision-making. While not a current deal-breaker, this presents room for future improvement as digital workflows become more common. The alignment between high-scoring features and user priorities validates Remidio’s core positioning and highlights areas to sustain or enhance.

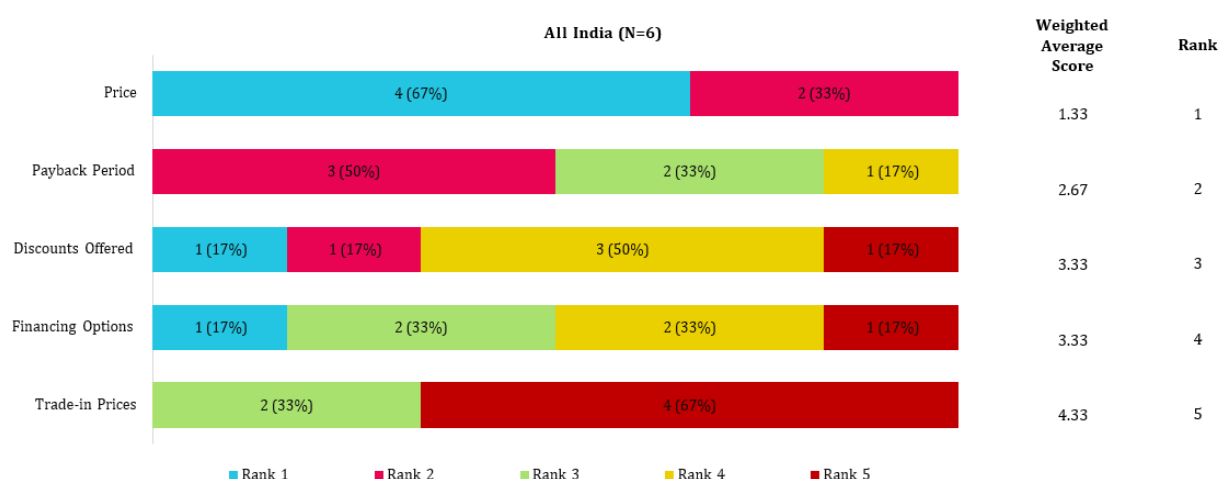
Table 4.2.3

Factors	Remidio	Deviation	Eyecare	Deviation	Optos	Deviation	Topcon	Deviation	Zeiss	Deviation
Base	N=6		N=1		N=3		N=1		N=2	
Advanced Product Features	4.17	+0.1	4.00	0.0	4.00	0.0	4.00	0.0	4.00	0.0
Product Specifications	4.00	-0.2	4.00	-0.2	4.33	+0.2	4.00	-0.2	4.50	+0.3
Performance (Stability)	4.17	-0.1	4.00	-0.3	4.67	+0.4	4.00	-0.3	4.50	+0.2
Ease of Use	4.50	+0.6	3.00	-0.9	3.67	-0.3	4.00	+0.1	4.50	+0.6
Integration & Compatibility	4.17	+0.2	3.00	-0.9	4.00	+0.1	4.00	+0.1	4.50	+0.6
Digitalization Features	4.17	-0.1	5.00	+0.8	4.00	-0.2	4.00	-0.2	4.00	-0.2
Image Quality	4.17	0.0	4.00	-0.1	4.00	-0.1	5.00	+0.9	3.50	-0.6
Robustness	4.17	0.0	5.00	+0.8	4.33	+0.1	4.00	-0.2	3.50	-0.7
Operating Cost	4.17	0.0	5.00	+0.8	4.33	+0.1	4.00	-0.2	3.50	-0.7

3. Commercial Parameters

Among commercial parameters, **After-Sales Service** ranks as the most important factor (avg. score ~1.8), highlighting doctors' reliance on strong technical and customer support, particularly given the complexity of retinal imaging devices. **Value for Money** (~2.0) and **Warranty & AMC Terms** (~2.3) follow closely, indicating that while pricing is important, buyers also prioritize reliability and long-term service continuity. At the pan-India level, **Price** remains a dominant driver, particularly in semi-metro and Tier 2 markets (score ~1.33), where ROI and affordability are more sensitive decision points. **Payback Period** ranks high in these cities, especially in semi-metros, suggesting the need to emphasize faster ROI in marketing communication. **Discounts** become more important in Tier 3 cities, where budget constraints dominate, creating clear case for deeper, market-specific promotional offers.

Fig 4.3.1



Commercial Parameters by type of city

Across cities, based on clinician responses from our survey, Remidio holds a strong position in semi-metros, with parity in price and payback terms compared to Zeiss and Optos. In Tier 2 and Tier 3 markets, Remidio often operates in a limited competitive field (with only one or two active players), giving it strategic room to dominate through more aggressive discounting and localized offers. Among early-career practitioners, Remidio matches competitors on pricing but falls short on discounts—an important gap in a price-sensitive segment.

In contrast, it performs well among mid-career doctors, where its industry-leading discount strategy and solid price positioning support higher market appeal. For senior experts, Remidio leads in payback period and discounts, and matches peers on

pricing—underscoring strong perceived value and fast ROI among experienced clinicians.

Table 4.3.1

Factors	All India	Rank	Metro	Rank	Semi - Metro	Rank	Tier 1	Rank	Tier 2	Rank	Tier 3	Rank
Base	N=6		N=2		N=2		N=0		N=1		N=1	
Price	1.33	1	2.00	1	1.00	1	-	-	1.00	1	1.00	1
Payback Period	2.67	2	3.00	4	2.00	2	-	-	2.00	2	4.00	4
Discounts Offered	3.33	3	2.50	2	4.50	4	-	-	4.00	4	2.00	2
Financing Options	3.33	4	2.50	3	4.50	5	-	-	3.00	3	3.00	3
Trade-in Prices	4.33	5	5.00	5	3.00	3	-	-	5.00	5	5.00	5

Commercial Parameters by year of experience

Experience-based segmentation shows price sensitivity is highest among early-career doctors, while mid-career practitioners (10–15 years) lean toward discounts, and senior doctors (>15 years) show increased interest in financing options (Rank #2, Score ~2.5). This points to evolving commercial expectations with career progression—offering Remidio the opportunity to tailor offers based on practitioner maturity.

Table 4.3.2

Factors	All India	Rank	< 5 years	Rank	5 – 10 years	Rank	10 – 15 years	Rank	> 15 years	Rank
Base	N=6		N=1		N=2		N=1		N=2	
Price	1.33	1	1.00	1	1.00	1	2.00	2	1.50	1
Payback Period	2.67	2	4.00	4	2.00	2	3.00	3	2.50	3
Discounts Offered	3.33	3	2.00	2	4.00	3	1.00	1	4.50	5
Financing Options	3.33	4	3.00	3	4.00	4	4.00	4	2.50	2
Trade-in Prices	4.33	5	5.00	5	4.00	5	5.00	5	4.00	4

Commercial Parameters by performance of company

On company performance, Remidio shows a balanced pricing position—competitive, but not industry-leading (score ~4.0). Discount offerings match market standards, although companies like Zeiss excel in certain segments. Remidio’s payback period performance lags behind leaders like Topcon, signaling an area for improvement in perceived ROI. Notably, Remidio excels in trade-in pricing, offering stronger equipment value retention compared to rivals—an advantage that can be leveraged in metro and Tier 2 markets.

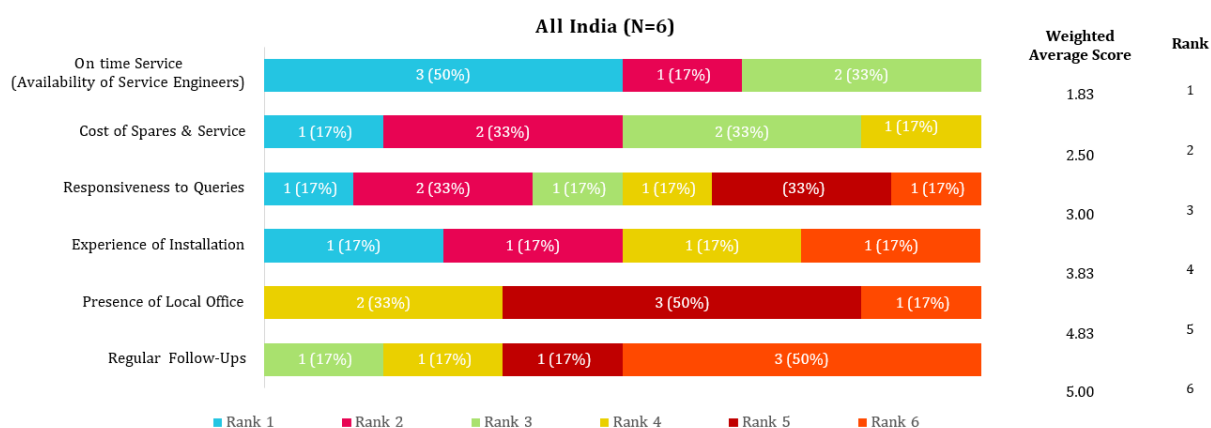
Table 4.3.3

Factors	Remidio	Deviation	Eyecare	Deviation	Optos	Deviation	Topcon	Deviation	Zeiss	Deviation
Base	N=6		N=1		N=3		N=1		N=2	
Price	4.00	-0.1	5.00	+0.9	4.33	+0.3	3.00	-1.1	4.00	-0.1
Discounts Offered	4.00	-0.2	4.00	-0.2	4.00	-0.2	5.00	+0.8	4.00	-0.2
Payback Period	4.17	+0.1	5.00	+0.9	4.33	+0.2	3.00	-1.1	4.00	-0.1
Trade-in Prices	4.17	0.0	4.00	-0.1	4.00	-0.1	4.00	-0.1	4.50	+0.4

4. Pre-Sales & Post-Sales Service Parameters

Among pre- and post-sales service parameters, **On-Time Service** emerges as the top priority (avg. score ~1.8), consistently ranked first across city types and especially valued by mid-career doctors (5–15 years), where workflow efficiency and patient volume are highest. **Cost of Spares & Service** follows closely (~2.5), particularly important in Tier 3 cities and among early-career (<5 years) and senior (>15 years) practitioners, indicating strong price sensitivity at both ends of the career spectrum. **Responsiveness to Queries** holds moderate importance (~3.0) overall but ranks significantly lower in Tier 3 cities, pointing to a gap in communication in remote markets. **Regular Follow-Ups**, though not widely prioritized (score ~5.0), see spikes in value when proactively delivered, especially in metro and semi-metro cities.

Fig 4.4.1



Pre-Sales & Post-Sales Service Parameters by type of city

Across cities, **On-Time Service** is the top priority—ranked 1st in Metro (2.0), Semi-Metro (1.5), and Tier 2 (1.0) cities—showing universal need for prompt support. **In Tier 3, Cost of Spares & Service** ranks highest (1.0), reflecting strong price sensitivity.

Responsiveness to Queries drops sharply in Tier 3 (6.0) despite moderate importance in Tier 2 (2.0) and metros (3.0), indicating poor communication reach in remote areas. Performance-wise, **Remidio excels in metros** with strong scores in **Cost (5.0)** and **Local Presence (4.5)**. In semi-metros, it performs well in **Follow-Ups (+0.6)** and **Installation (4.5)** but lags on cost (3.5). In Tier 2, it is strong in **On-Time Service** and **Installation (4.0 each)**, but behind in responsiveness (3.0). In Tier 3, **Follow-Ups score 5.0**, though **Installation remains weak (3.0)**, highlighting a need for better onboarding in rural markets.

Table 4.4.1

Factors	All India	Rank	Metro	Rank	Semi - Metro	Rank	Tier 1	Rank	Tier 2	Rank	Tier 3	Rank
Base	N=6		N=2		N=2		N=0		N=1		N=1	
On time Service (Availability of Service Engineers)	1.83	1	2.00	1	1.50	1	-	-	1.00	1	3.00	3
Cost of Spares & Service	2.50	2	2.00	2	3.00	2	-	-	4.00	4	1.00	1
Responsiveness to Queries	3.00	3	2.00	3	3.00	3	-	-	2.00	2	6.00	6
Experience of Installation	3.83	4	4.50	4	3.50	4	-	-	5.00	5	2.00	2
Presence of Local Office	4.83	5	4.50	5	5.00	5	-	-	6.00	6	4.00	4
Regular Follow-Ups	5.00	6	6.00	6	5.00	6	-	-	3.00	3	5.00	5

Pre-Sales & Post-Sales Service by year of experience

From a user experience lens, **early-career doctors** rate Remidio highly for service consistency across five dimensions, though installation remains a weaker area (score 3.0). **Mid-level practitioners** appreciate strong engineer availability and consistent follow-up support, giving Remidio a service edge over Eyecare and Topcon. Among **experienced professionals (10–15 years)**, Remidio achieves **perfect scores across all service parameters**, suggesting strong loyalty and satisfaction. However, with **senior experts (>15 years)**, performance dips slightly—Remidio matches competitors on cost but lags in **On-Time Service** and **Responsiveness**, highlighting areas for targeted improvement.

Table 4.4.2

Factors	All India	Rank	< 5 years	Rank	5 – 10 years	Rank	10 – 15 years	Rank	> 15 years	Rank
Base	N=6		N=1		N=2		N=1		N=2	
On time Service (Availability of Service Engineers)	1.83	1	1.50	3	1.00	1	1.00	1	2.50	2
Cost of Spares & Service	2.50	2	0.50	1	3.50	3	2.00	2	2.50	1
Responsiveness to Queries	3.00	3	3.00	6	2.00	2	3.00	3	2.50	3
Experience of Installation	3.83	4	1.00	2	5.50	5	4.00	4	3.00	4
Presence of Local Office	4.83	5	2.00	4	5.50	6	5.00	5	4.50	5
Regular Follow-Ups	5.00	6	2.50	5	3.50	4	6.00	6	6.00	6

Pre-Sales & Post-Sales Service by performance of company

Performance-wise, **Remidio leads across 5 of 6 service parameters**, with standout scores in **Cost, Installation Experience, Local Office Presence, and Responsiveness**, achieving average ratings of ≥ 4.0 nationwide. In metro markets, Remidio is strong in **Local Presence (4.5)** and **Cost of Service (5.0)**, with minor gaps in **On-Time Service** (slight negative deviation). In semi-metros, the brand shows superior post-sales engagement (positive deviations in On-Time Service and Follow-Ups), but a lower score on **Cost of Spares** suggests pricing concerns compared to Zeiss. In Tier 2 cities, Remidio performs well on core service touchpoints (On-Time, Cost, Installation) but needs improvement in follow-ups and responsiveness, where Topcon scores better. Tier 3 feedback reveals **excellent follow-up engagement** (score: 5.0) but lower ratings on installation (3.0), indicating a need to enhance first-touch experiences.

Table 4.4.3

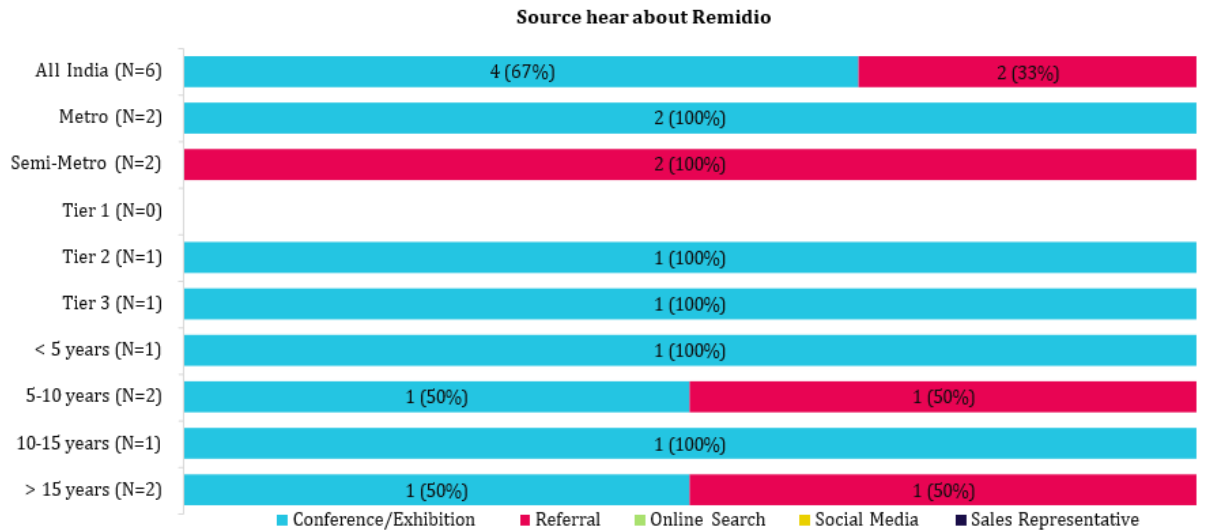
Factors	Remidio	Deviation	Eyecare	Deviation	Optos	Deviation	Topcon	Deviation	Zeiss	Deviation
Base	N=6		N=1		N=3		N=1		N=2	
Cost of Spares & Service	4.17	+0.2	4.00	+0.1	4.00	+0.1	3.00	-0.9	4.50	+0.6
On time Service (Availability of Service Engineers)	4.00	+0.3	3.00	-0.7	4.33	+0.7	3.00	-0.7	4.00	+0.3
Experience of Installation	4.17	0.0	5.00	+0.8	4.67	+0.5	3.00	-1.2	4.00	-0.2
Responsiveness to Queries	4.17	0.0	4.00	-0.2	4.33	+0.1	4.00	-0.2	4.50	+0.3
Presence of Local Office	4.17	+0.1	4.00	0.0	4.00	0.0	4.00	0.0	4.00	0.0
Regular Follow-Ups	4.33	+0.3	3.00	-1.0	4.67	+0.7	4.00	0.0	4.00	0.0

5. Remedio Product Usage

Awareness Channels for Remidio

Across India, **67% of respondents learned about Remidio through conferences and exhibitions**, with metro respondents showing 100% reliance on this channel—highlighting its effectiveness for urban outreach. In contrast, **semi-metro awareness is entirely driven by referrals (100%)**, signaling the impact of peer influence and local networks in these regions. Among doctors with **5–10 years and >15 years of experience**, awareness is evenly split between conferences and referrals (50% each), indicating both channels remain relevant across career stages.

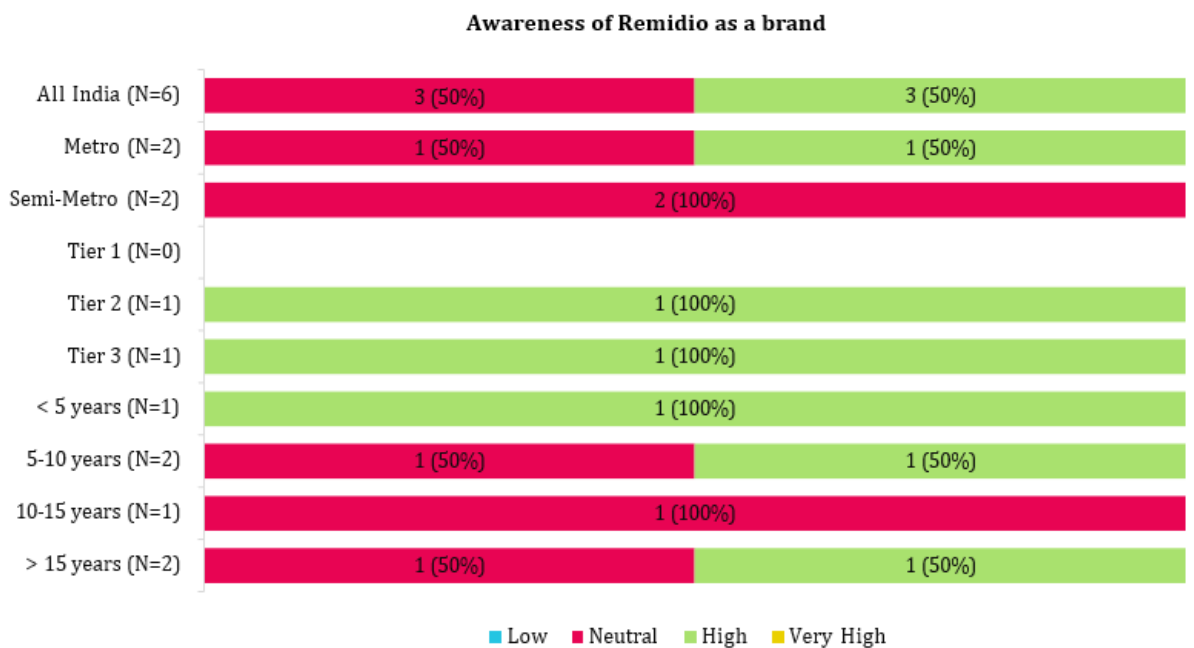
Fig 4.5.1



Brand Awareness – By City Type & Experience

Remidio enjoys **100% high brand awareness in Tier 2 and Tier 3 cities**, reflecting successful penetration into emerging markets. However, in semi-metros, brand perception is **100% neutral**, suggesting a need for stronger differentiation and messaging to convert awareness into preference. Nationally, brand awareness is split—**50% high, 50% neutral**—pointing to a balanced position with potential to further strengthen emotional and value-based brand connections.

Fig 4.5.2



Brand Ratings – Innovation, Reliability, Effectiveness

Remidio receives **strong innovation scores**, with **33% of respondents rating it 5 and 50% rating it 4**, reflecting consistent brand equity in technology leadership.

Reliability is particularly strong in Tier 3, where all respondents rated it 4, showing trust in smaller market settings. **Effectiveness is highly rated in metros**, where 100% of users gave scores of 4 or 5, validating Remidio’s strong product performance and user satisfaction in high-volume clinical environments.

Table 4.5.1

	All India	Metro	Semi-Metro	Tier 1	Tier 2	Tier 3	< 5 years	5-10 years	10-15 years	>15 years
Base	N=6	N=2	N=2	N=0	N=1	N=1	N=1	N=2	N=1	N=2
Rating 3	1 (17%)	1 (50%)	-	-	-	-	-	-	-	1 (50%)
Rating 4	3 (50%)	1 (50%)	1 (50%)	-	-	1 (100%)	1 (100%)	1 (50%)	1 (100%)	-
Rating 5	2 (33%)	-	1 (50%)	-	1 (100%)	-	-	1 (50%)	-	1 (50%)

Table 4.5.2

	All India	Metro	Semi-Metro	Tier 1	Tier 2	Tier 3	< 5 years	5-10 years	10-15 years	>15 years
Base	N=6	N=2	N=2	N=0	N=1	N=1	N=1	N=2	N=1	N=2
Rating 3	1 (17%)	-	1 (50%)	-	-	-	-	1 (50%)	-	-
Rating 4	3 (50%)	1 (50%)	1 (50%)	-	-	1 (100%)	1 (100%)	-	-	2 (100%)
Rating 5	2 (33%)	1 (50%)	-	-	1 (100%)	-	-	1 (50%)	1 (100%)	-

Table 4.5.3

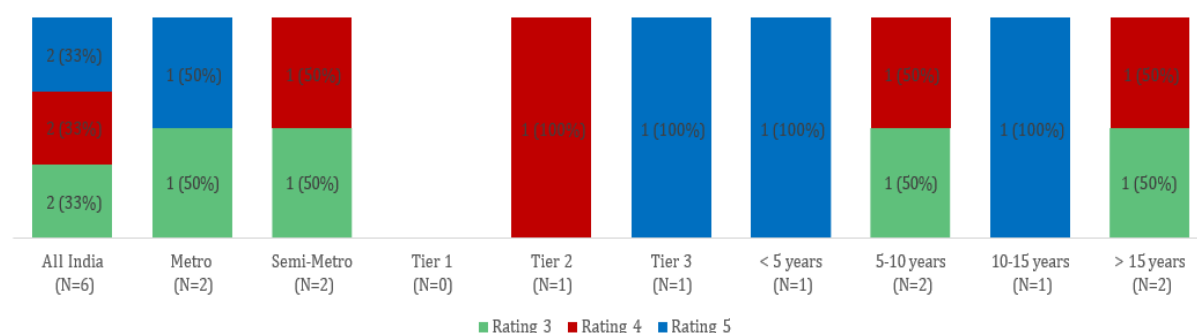
	All India	Metro	Semi-Metro	Tier 1	Tier 2	Tier 3	< 5 years	5-10 years	10-15 years	>15 years
Base	N=6	N=2	N=2	N=0	N=1	N=1	N=1	N=2	N=1	N=2
Rating 4	3 (50%)	-	2 (100%)	-	1 (100%)	-	-	2 (100%)	-	1 (50%)
Rating 5	3 (50%)	2 (100%)	-	-	-	1 (100%)	1 (100%)	-	1 (100%)	1 (50%)

6. Price-to-Value Assessment of Remidio Devices

Nationally, **33% of respondents rated Remidio’s price-to-value at 3, 4, and 5**, indicating a **mixed perception** of value, with no clear majority. However, satisfaction is **consistently high in Tier 2 and Tier 3 cities**, where 100% of respondents rated the value as 4 and 5, respectively suggesting that pricing aligns well with expectations in lower-tier markets. **Metro areas show a split** (50% rating it 3, 50% rating it 5), reflecting varying views possibly due to exposure to premium alternatives. In **semi-metro cities**, the split is between ratings 3 and 4, implying moderate satisfaction but some room for value enhancement. Experience-wise, respondents with **<5 years and**

10–15 years of experience unanimously rated the value as 5, showing strong appreciation among both new and seasoned users.

Fig 4.6.1

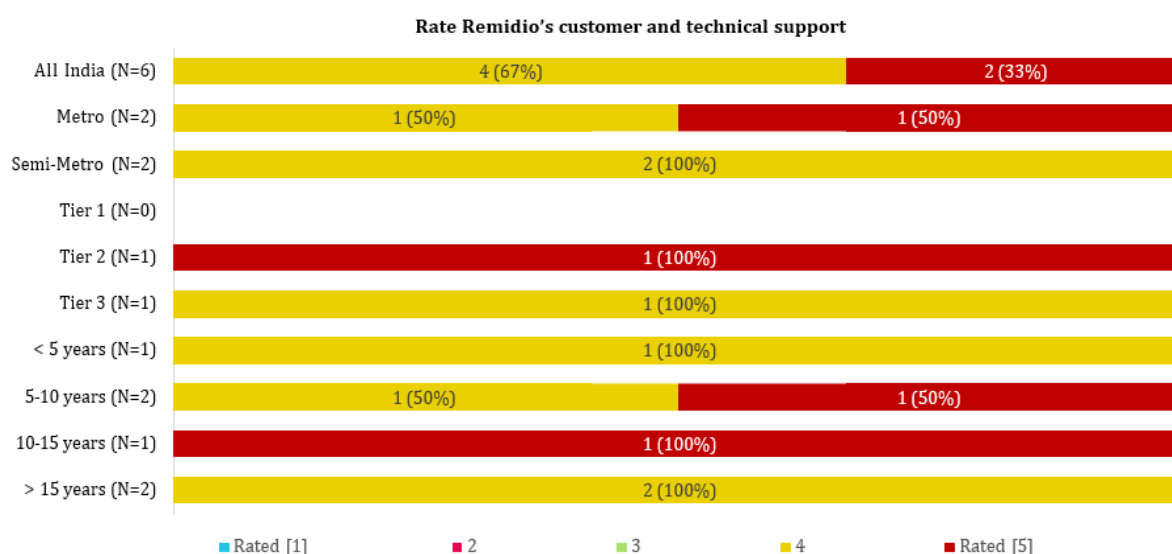


7. After Sales Service & Support

Customer Support & Technical Assistance Rating

Nationally, **67% of respondents rate Remidio’s customer and technical support a 4**, while **33% rate it a 5**, indicating a strong overall satisfaction level. In **semi-metro cities**, support is uniformly rated 4 (100%), reflecting reliable but slightly improvable service. In contrast, **Tier 2 cities show perfect satisfaction (100% rating of 5)**, highlighting exemplary performance in smaller markets. Among users with **>15 years of experience**, all respondents rate the support as 4, confirming consistent service delivery for senior practitioners. While no major gaps are reported, the absence of "5" ratings in semi-metros and senior groups suggests room for enhancing support from “good” to “excellent.”

Fig 4.7.1



8. **Brand Differentiation & Positioning**

Uniqueness of Remidio

Affordability is Remidio’s most cited differentiator—mentioned by **33% overall**, **100% in metros**, and all clinicians with **>15 years of experience**, emphasizing its value proposition. **AI capabilities** are also seen as unique by **33%**, especially in **semi-metros**, while **quality and reliability** are cited by another **33%**, particularly in **Tier 2 cities** and by those with **<5 years of experience**. In terms of competition, **Zeiss and Optos** are the most frequently mentioned alternatives (33% each), with **Zeiss dominant among the most experienced doctors**, reflecting positioning against premium brands.

Table 4.8.1

	All India	Metro	Semi-Metro	Tier 1	Tier 2	Tier 3	< 5 years	5-10 years	10-15 years	>15 years
Base	N=6	N=2	N=2	N=0	N=1	N=1	N=1	N=2	N=1	N=2
Affordability	2 (33%)	2 (100%)	-	-	-	-	-	-	1 (100%)	1 (50%)
AI Capabilities	2 (33%)	-	2 (100%)	-	-	-	-	1 (50%)	-	1 (50%)
Quality & Reliability	2 (33%)	-	-	-	1 (100%)	1 (100%)	1 (100%)	1 (50%)	-	-

Table 4.8.2

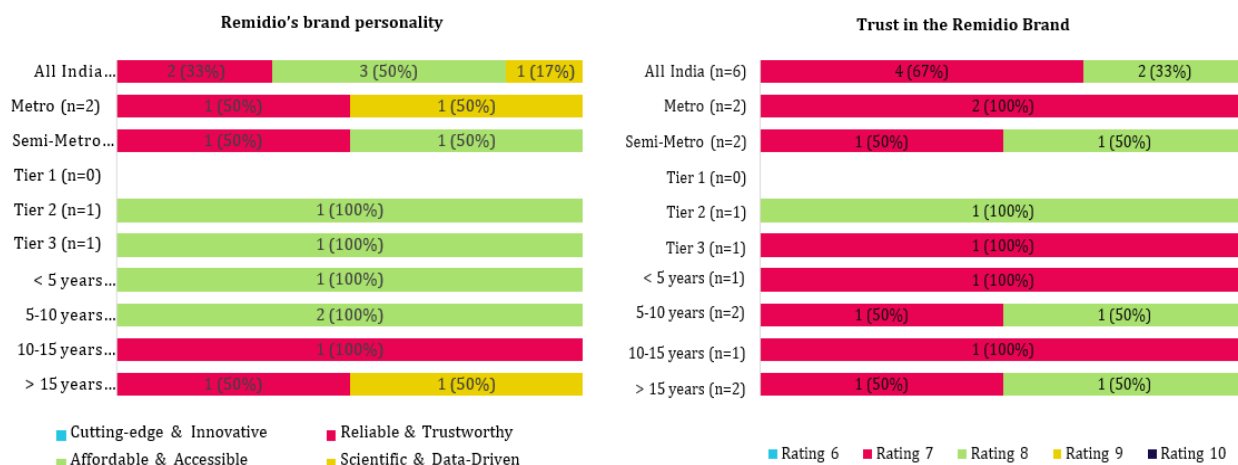
	All India	Metro	Semi-Metro	Tier 1	Tier 2	Tier 3	< 5 years	5-10 years	10-15 years	>15 years
Base	N=6	N=2	N=2	N=0	N=1	N=1	N=1	N=2	N=1	N=2
Eyecare	1 (17%)	-	1 (50%)	-	-	-	-	1 (50%)	-	-
Optos	2 (33%)	1 (50%)	-	-	-	1 (100%)	1 (100%)	-	1 (100%)	-
Topcon	1 (17%)	-	-	-	1 (100%)	-	-	1 (50%)	-	-
Zeiss	2 (33%)	1 (50%)	1 (50%)	-	-	-	-	-	-	2 (100%)

Brand Personality & Trust

Remidio is perceived as **affordable and accessible** by 33% overall and **50% of metro and semi-metro clinicians**, while **reliability and trustworthiness** are emphasized by **50% of professionals with 10–15 years of experience**, showing strong appeal among mid-career users. Trust in the brand is high **67% rate it a 7**, and **33% give it a 10**, with **100% top trust scores from Tier 2, Tier 3, and <5-year clinicians**. This indicates

strong brand credibility in emerging markets and among newer professionals, while also reflecting consistent reputation across key user segments.

Fig 4.8.1

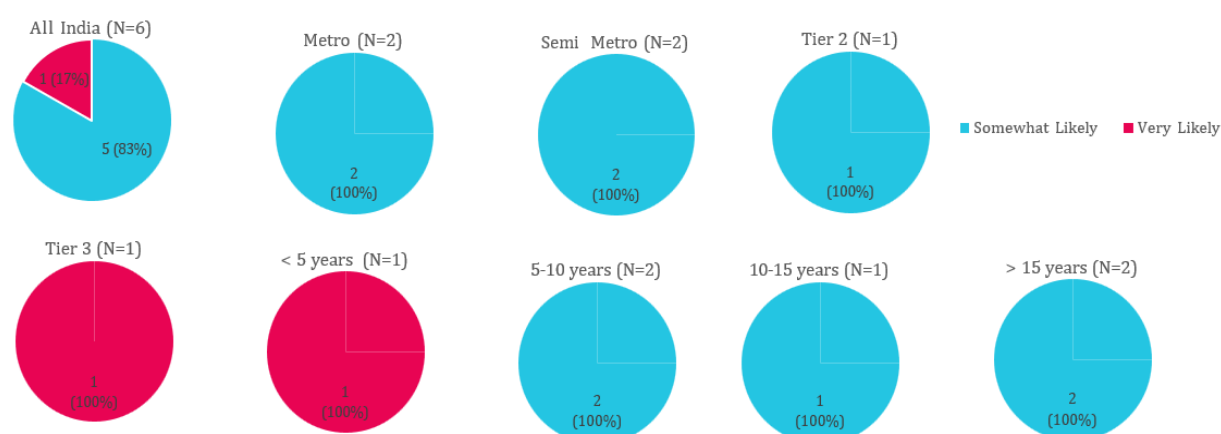


9. Perceptions And Preferences

Willingness to Purchase New Remidio Products

Nationally, **83% of clinicians are somewhat likely** and **17% are very likely** to purchase new Remidio products—indicating strong interest overall. Notably, **100% of clinicians in metro, semi-metro, and Tier 2 cities** fall into the “somewhat likely” category, showing broad but cautious openness. In contrast, **Tier 3 cities and <5-year experienced clinicians show 100% 'very likely' responses**, highlighting enthusiasm in underserved or early-career segments. This suggests newer users and emerging markets are more receptive to innovation and product expansion from Remidio.

Fig 4.9.1



Decision-Makers & Purchase Influencers

Ophthalmologists are the key decision-makers, accounting for **50% of all decisions**, and having **100% control in metros and Tier 3 cities**, indicating strong clinical

authority in both advanced and emerging regions. **Clinical performance and training availability** are the top influencing factors (33% each), reflecting the importance of both product efficacy and onboarding support. In **metro markets**, these two factors are equally emphasized (50% each), while **Tier 2 cities prioritize training availability exclusively (100%)**, underscoring the need for hands-on support and education to drive adoption.

Table 4.9.1

Most Influential Factor	All India	Metro	Semi-Metro	Tier 1	Tier 2	Tier 3	< 5 years	5-10 years	10-15 years	>15 years
Base	N=6	N=2	N=2	N=0	N=1	N=1	N=1	N=2	N=1	N=2
Neutral (3-6)	4 (67%)	1 (50%)	2 (100%)	-	-	1 (100%)	1 (100%)	1 (50%)	1 (100%)	1 (50%)
Highly Likely (7-10)	2 (33%)	1 (50%)	-	-	1 (100%)	-	-	1 (50%)	-	1 (50%)

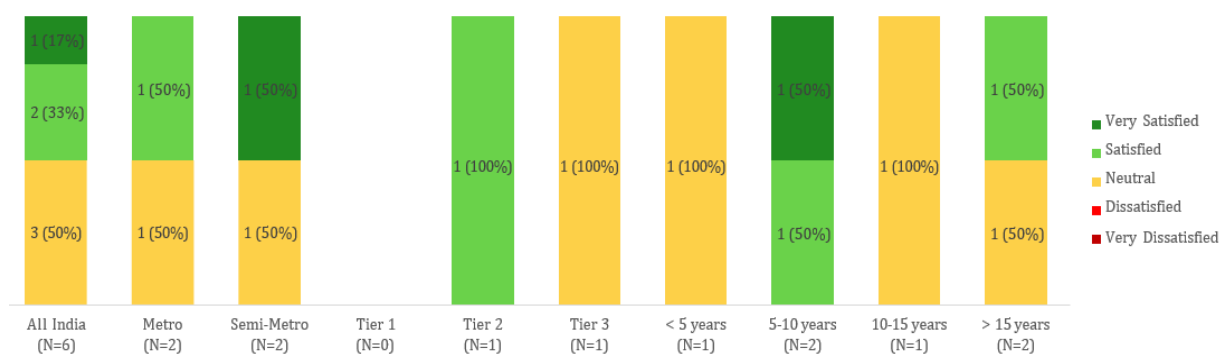
Table 4.9.2

Role in Organization	All India	Metro	Semi-Metro	Tier 1	Tier 2	Tier 3	< 5 years	5-10 years	10-15 years	>15 years
Base	N=6	N=2	N=2	N=0	N=1	N=1	N=1	N=2	N=1	N=2
Yes	5 (83%)	2 (100%)	2 (100%)	-	1 (100%)	-	-	2 (100%)	1 (100%)	2 (100%)
Maybe	1 (17%)	-	-	-	-	1 (100%)	1 (100%)	-	-	-

10. Level of Satisfaction and Loyalty on Remidio Product

Overall satisfaction with Remidio is **mixed**, with **50% of respondents neutral**, **33% satisfied**, and only **17% very satisfied**, indicating room for improvement in customer experience. By geography, **semi-metro cities perform best** with 50% “very satisfied,” while **Tier 3 shows 100% neutral**, revealing a satisfaction gap in lower-tier markets. By experience, **mid-career professionals (5–10 years)** show the highest satisfaction (50% very satisfied), whereas **10–15 year veterans** report only neutral feedback (100%), pointing to a misalignment with more experienced clinicians. **Tier 2 cities show 100% satisfaction**, making them high-potential targets for brand reinforcement.

Fig 4.10.1



Willingness to Rebuy and Recommend

83% of respondents are willing to repurchase from Remidio, with 100% intent in metros, semi-metros, Tier 2 cities, and among all clinicians with over 5 years of experience—indicating robust loyalty in most segments. However, Tier 3 cities show weaker repurchase signals, with all responses marked as “Maybe,” highlighting a clear retention risk. On advocacy, only 33% are highly likely to recommend, while 67% remain neutral, reflecting moderate brand advocacy. Notably, 5–10 year professionals show the strongest referral intent (50% highly likely), suggesting this group could be leveraged for peer influence and targeted referral campaigns.

Table 4.10.1

Role in Organization	All India	Metro	Semi-Metro	Tier 1	Tier 2	Tier 3	< 5 years	5-10 years	10-15 years	>15 years
Base	N=6	N=2	N=2	N=0	N=1	N=1	N=1	N=2	N=1	N=2
Yes	5 (83%)	2 (100%)	2 (100%)	-	1 (100%)	-	-	2 (100%)	1 (100%)	2 (100%)
Maybe	1 (17%)	-	-	-	-	1 (100%)	1 (100%)	-	-	-

Table 4.10.2

Most Influential Factor	All India	Metro	Semi-Metro	Tier 1	Tier 2	Tier 3	< 5 years	5-10 years	10-15 years	>15 years
Base	N=6	N=2	N=2	N=0	N=1	N=1	N=1	N=2	N=1	N=2
Neutral (3-6)	4 (67%)	1 (50%)	2 (100%)	-	-	1 (100%)	1 (100%)	1 (50%)	1 (100%)	1 (50%)
Highly Likely (7-10)	2 (33%)	1 (50%)	-	-	1 (100%)	-	-	1 (50%)	-	1 (50%)

Chapter 5

Discussion

The present study aimed to evaluate customer satisfaction among ophthalmologists regarding Remidio's retinal imaging solutions, with a focused exploration of key parameters influencing product perception, commercial value, and service delivery. Primary data were gathered through structured interviews and surveys conducted across multiple city tiers and professional experience levels. The findings offer in-depth insights into clinical priorities, technological expectations, and service preferences from practicing ophthalmologists, and synthesize data-driven insights into thematic interpretations reflecting market expectations, satisfaction drivers, and strategic implications for Remidio's positioning.

Demographic and Practice-Based Influences

Clinician specialization and experience were central determinants shaping device preference and satisfaction. The sample had a dominant representation of retina specialists (50%), particularly in metro cities, aligning closely with Remidio's strength in wide-field retinal imaging—critical in urban tertiary setups handling complex retinal diagnoses. Conversely, general ophthalmologists were more common in Tier 2 and Tier 3 cities, where diagnostic needs are broader and more generalist in nature, requiring versatile, multi-use devices.

Experience also influenced expectations significantly. A majority (67%) of respondents had over 10 years of clinical practice, reflecting Remidio's traction among mature, experienced users. Senior ophthalmologists (≥ 15 years) emphasized clinical performance factors like Field of View and Image Quality, while early-career doctors (< 5 years) prioritized ease of use and portability—indicative of resource-constrained, flexible practice settings.

Practice setting played a crucial role as well. Metro-based respondents were mostly institution-affiliated and reported higher patient volumes, demanding more robust and workflow-integrated systems. In contrast, doctors in Tier 2 and 3 cities typically practiced in standalone clinics, showing price sensitivity and favoring compact, easily deployable solutions. These distinctions underline the importance of a tiered go-to-market strategy for Remidio.

Product-Specific Performance and Interpretation

Among product features, **Field of View** emerged as the most important criterion (avg. rank ~2.0), particularly relevant for retina-focused specialists who require expansive retinal visualization. Remidio performed strongly here, with metro respondents rating it 4.8/5. **Image Quality** (~2.2) and **Ease of Use** (~2.5) followed closely, reinforcing that clarity and operational efficiency are vital decision-making factors.

Interestingly, **EMR Integration** scored lowest in importance (~6.0), especially in Tier 2 and 3 cities, due to limited digitization. However, this factor is gaining importance among metro-based and mid-career users, pointing to a potential shift as practices grow and digitize. **Portability**, though not highly valued in metros, was a major factor in Tier 3 cities and among younger users, revealing an opportunity for modular, transport-friendly devices.

Performance Across City Types and Experience Segments

Preferences varied by both geography and clinical experience. In metros, clinicians emphasized **technical performance**, especially Field of View (~1.5) and Image Quality (~1.6), consistent with their higher clinical volumes and specialization. These users require speed, precision, and integration.

In semi-metro and Tier 2 areas, priorities shifted toward **usability, cost, and post-sales support**, driven by logistical challenges in smaller clinics. Here, **Ease of Use** and **Portability** scored highly (>4.2/5), reflecting the need for practical, efficient systems. In Tier 3, **Portability** reached 4.5/5—underlining the value of compact devices for mobile clinics and outreach settings.

From a professional experience perspective, early-career doctors valued **usability and portability** (4.6/5 and 4.5/5, respectively), while senior professionals prioritized **imaging performance** (Field of View 4.8/5, Image Quality 4.7/5). These patterns confirm that expectations align strongly with clinical maturity and practice complexity.

Commercial Attributes and Their Impact on Satisfaction

Commercial considerations such as **After-Sales Service** (avg. score 1.8), **Value for Money** (2.0), and **Warranty and AMC terms** (2.3) were top influencers of satisfaction, indicating that decisions are shaped not just by price, but by **service**

reliability and lifecycle support. In Tier 2 and 3 cities, **Price** ranked highest, emphasizing the importance of affordability and faster payback in emerging markets.

Remidio's price positioning was found competitive in semi-metros and Tier 2 regions, often outperforming rivals like Zeiss and Optos. However, in metro areas, Remidio trails premium brands in **payback period perception**, highlighting the need for enhanced ROI messaging. Lack of deep discounts in Tier 3 cities also presents a barrier to wider adoption, given high price sensitivity in these regions.

Segmented by experience, early-career doctors preferred **discounts and entry-level pricing**, while mid-career users responded positively to **trade-in offers and flexible payment plans**. Senior professionals showed stronger interest in **structured financing options**, pointing to the need for tiered commercial strategies based on practitioner maturity.

Service Delivery and Support Satisfaction

Service-related parameters were consistently rated as crucial, with **On-Time Service** receiving top importance (score: 1.83), especially among mid-level professionals (5–15 years) managing dense clinical workloads. **Cost of Spares** ranked next (~2.5), notably among Tier 3 and early/late-career practitioners, emphasizing the need for sustainable ownership models.

Remidio performed well across most service dimensions—including **installation, responsiveness, and local presence**—with average ratings ≥ 4.0 , particularly in metros and Tier 2 cities. However, Survey-based feedback indicated that responsiveness scored poorly in Tier 3 (6.0), revealing a critical communication gap in underserved regions. Addressing this could significantly enhance trust and customer retention.

While early-career doctors appreciated engineer availability, they rated **installation processes lower** (~3.0), suggesting a need for simplified onboarding. In contrast, **mid-career users** gave Remidio perfect scores across all service touchpoints, marking them as highly satisfied and potentially loyal customers.

Brand Perception, Differentiation and Advocacy

Brand visibility was strong across markets. In metros, Remidio's awareness stemmed entirely from **professional conferences**, while in semi-metros, **peer referrals**

dominated. This illustrates that marketing channels vary by geography—urban areas favor formal outreach, whereas mid-tier cities rely on word-of-mouth.

Remidio enjoys **100% awareness** in Tier 2 and 3 markets. However, **brand perception is neutral in semi-metros**, highlighting a need to reinforce emotional connection and differentiation. Affordability was cited as the most compelling USP (33%), especially by metro and senior doctors. Other perceived strengths included **AI capabilities** and **product reliability**, establishing Remidio’s positioning as both innovative and cost-effective.

Trust scores were also strong: 67% of clinicians rated Remidio 7/10, and 33% gave a full 10/10. Highest trust was reported in Tier 2/3 and among early-career doctors. However, the absence of very high satisfaction among metro and senior users points to an opportunity to strengthen value perception in the high-end segment.

Overall Satisfaction, Loyalty and Purchase Intent

While **83% of clinicians indicated willingness to repurchase** Remidio devices, only 17% were ‘very satisfied’ with current offerings. A significant portion (50%) remained neutral, suggesting that satisfaction can be elevated through improved post-purchase engagement. Notably, **Tier 2 cities reported the highest satisfaction (100%)**, whereas **Tier 3 respondents were entirely neutral**, indicating unmet expectations.

Regarding brand advocacy, only **33% were highly likely to recommend Remidio**, with the remainder neutral. **Doctors with 5–10 years’ experience** showed the highest likelihood to refer, positioning them as strategic ambassadors for influencer or KOL initiatives. Meanwhile, **Tier 3 clinicians expressed tentative purchase intent**, reinforcing the need for stronger reassurance and localized service support.

Preference and Perception

Overall, the study highlights distinct patterns in preferences and behavior. Retina specialists and metro-based experts prioritized **advanced imaging**; general ophthalmologists in smaller cities emphasized **affordability and usability**. Younger doctors valued **portability and training**, while senior clinicians expected **clinical depth and reliability**. Institutions preferred robust, integrated platforms, whereas standalone clinics focused on **ROI and deployability**. Remidio’s strength lies in its alignment with core clinical needs and value orientation, but improvements in service

infrastructure, regional customization, and brand communication can further elevate satisfaction and loyalty.

Factors Influencing Preference and Adoption

The study identifies six primary drivers:

1. **Clinical Specialization** – Retina specialists prioritize Field of View and Image Quality.
2. **Experience Level** – Early-career users seek simplicity; experienced doctors demand performance.
3. **City-Tier** – Urban areas focus on precision; lower-tier markets prioritize price and usability.
4. **Service Support** – Timely, local service boosts satisfaction and loyalty.
5. **Commercial Flexibility** – Discounts, financing, and ROI shape purchasing decisions.
6. **Brand Differentiation** – Perceived affordability, reliability, and AI features create a competitive edge.

This analysis establishes that Remidio is strongly positioned in the Indian ophthalmology market, particularly through its strengths in **imaging performance, ease of use, and affordability**. However, expanding satisfaction and long-term loyalty will require **experience- and tier-specific strategies**: improved rural servicing, simplified onboarding, customized commercial packages, and enhanced post-sale engagement. As the ophthalmic technology landscape continues to evolve toward **digital integration and accessibility**, Remidio is well-placed to lead—provided it continues to adapt its offerings to the varied and dynamic preferences of its user base.

Key Takeaways

- **Retina specialists made up 50% of respondents**, especially from metro cities. This confirms that Remidio’s wide-field imaging devices are well-suited for advanced retinal care settings where specialist expertise and high-end diagnostics are prioritized.
- **General ophthalmologists dominate in Tier 2 and Tier 3 cities**, highlighting the need for devices that can support comprehensive, day-to-day eye examinations. These clinicians frequently treat a broad spectrum of cases, and thus prefer multi-purpose equipment that balances performance with cost-efficiency. Devices offering both

anterior and posterior imaging in a compact form would be highly attractive in this segment.

- **A majority (67%) of respondents had over 10 years of clinical experience**, reflecting that Remidio’s existing customer base includes experienced practitioners who typically evaluate technology based on reliability, long-term performance, and return on investment.
- **Early-career doctors (<5 years of experience)**, though fewer in the sample, showed 100% intent to repurchase and reported high satisfaction. This indicates a strong growth opportunity, as newer practitioners are often open to adopting modern, digital tools to differentiate their practice. Providing tailored onboarding support, extended payment terms, or guided training could strengthen early loyalty.
- **Doctors in metro cities commonly work in institutional or corporate setups**, which deal with high patient volume and complex retinal conditions. These practices demand precision, fast workflow, and EMR integration—areas where advanced imaging and digital capabilities play a critical role in clinical decision-making.
- **In Tier 2 and Tier 3 cities, most clinics are standalone with limited staff**, and often face infrastructure constraints. Here, ease of use, portability, and lower operating costs are more important than high-end specifications, making intuitive, plug-and-play devices more favorable.
- **The three most valued product features** across all geographies were:
 - **Field of View (~2.0)**, essential for wide retinal imaging.
 - **Image Quality (~2.2)**, which directly impacts diagnostic accuracy.
 - **Ease of Use (~2.5)**, especially appreciated where support staff are limited.
- **Portability was rated highly (4.5/5) in Tier 3 cities and by early-career doctors**, indicating the importance of compact devices that can support mobile clinics or shared use across multiple setups. This suggests strong potential for Remidio’s portable models in outreach and community screening programs.
- **EMR integration ranked lower (~6.0) overall**, likely due to limited digitization in smaller clinics. However, it is increasingly desired by mid-career and senior practitioners operating in urban or semi-digital environments. Integrating EMR compatibility may become a competitive advantage as digital health adoption increases.
- **Metro-based clinicians prioritized technical features** such as image clarity and field of view. **Tier 2 and Tier 3 doctors focused more on affordability and**

usability due to limited budgets and lower patient volumes. For example, a metro doctor may prioritize diabetic retinopathy imaging, while a Tier 3 doctor may focus on usability during basic eye camps.

- **Doctor preferences differed by experience:** early-career doctors valued simplicity and affordability; mid-career professionals appreciated options for upgrades and integration; senior practitioners emphasized reliability, service quality, and long-term clinical outcomes.
- **‘After-Sales Service’ was the top-rated commercial factor (~1.8)**, reinforcing the importance of ongoing support, especially in decentralized clinics. Value for Money (~2.0) and Warranty/AMC (~2.3) were also seen as key enablers for purchasing decisions.
- **Price was the most decisive factor in Tier 2 and Tier 3 cities**, where doctors often self-finance and operate at tighter margins. A product’s affordability can directly impact accessibility and adoption in these markets.
- **Remidio was perceived as competitively priced in Tier 2/semi-metro cities**, often matching or outperforming global brands in value. However, **metro doctors saw the payback period as slower** compared to high-end brands like Zeiss. This is likely due to higher expectations on ROI through reimbursements or procedure volumes, and should be addressed with clear economic value communication.
- **Discounting strategies in Tier 3 markets were considered insufficient**, limiting Remidio’s competitive advantage. Conditional discounts based on peer referrals or bundled services could enhance reach in this segment.
- **Mid-career doctors reported the highest satisfaction**, making them ideal for partnership in clinical validations, referral campaigns, and peer-led marketing.
- **Tier 3 doctors raised concerns about responsiveness**, especially for installations and follow-ups. A decentralized support system using WhatsApp groups or local service engineers could drastically improve turnaround time and satisfaction.
- **Brand awareness was 100% across all tiers**, but semi-metros displayed neutral perception—indicating that while recognition exists, Remidio needs to invest in emotional storytelling, case studies, and deeper customer engagement in these zones.
- **Remidio’s top brand attributes include affordability, AI capabilities, and image reliability.** However, many doctors do not yet associate it with premium innovation. Repositioning these features as clinical enablers (e.g., AI for screening throughput) could strengthen differentiation.

- **Despite 83% repurchase intent, only 33% were highly likely to recommend the brand**, suggesting a satisfaction gap that needs to be addressed through post-sales engagement and performance follow-up.
- **Mid-career doctors showed the highest referral potential**, highlighting the importance of launching a structured “Remidio Champions” program to promote organic advocacy.

Chapter 6

Recommendation

1. Implement a Dual-Tier Product Strategy

Develop differentiated product configurations tailored to specific geographies. High-end configurations should target metro-based retina specialists focused on advanced imaging, while compact, cost-effective models with essential features (e.g., portability, ease of use) should serve Tier 2 and Tier 3 clinics.

2. Enhance Value Communication in Metro Markets

In urban tertiary centres, where Remidio trails in perceived ROI and payback period, focus marketing communication on long-term value creation. Case studies, ROI calculators, and clinical outcome data can strengthen brand positioning against premium competitors like Zeiss and Topcon.

3. Expand Discount and Financing Schemes for Tier 3 and Early-Career Segments

The study indicates strong price sensitivity in Tier 3 cities and among clinicians with <5 years of experience. Introduce targeted discount schemes, bundled offers, and low-interest financing to facilitate adoption in these budget-constrained settings.

4. Improve Installation and Service Responsiveness in Remote Areas

Lower service scores in Tier 3—particularly for installation and responsiveness—highlight the need to invest in stronger last-mile service infrastructure. This could include deploying regional service hubs or mobile technician teams.

5. Leverage Portability as a Differentiator in Outreach-Focused Markets

Since portability is highly valued in lower-tier markets and by mobile practitioners, position this feature more prominently in sales pitches and marketing materials targeting outreach programs and eye camps.

6. Engage Mid-Career Ophthalmologists as Brand Advocates

The 5–10 years' experience group shows the highest satisfaction and referral potential. Launch Key Opinion Leader (KOL) initiatives or ambassador programs to build advocacy among this strategically influential segment.

7. Simplify Onboarding and Training for New Users

Given lower installation satisfaction among early-career doctors, streamline onboarding with modular video tutorials, user manuals, and regional training workshops to build confidence and reduce operational friction.

8. Localize Brand Messaging in Semi-Metros

Semi-metro respondents displayed neutral brand perception despite awareness. Refine messaging to emphasize practical benefits, peer referrals, and emotional value propositions like trust, continuity, and local support.

9. Invest Moderately in EMR Integration Features

While not critical across all tiers, EMR integration is gaining importance among mid-career and metro-based doctors. A modular integration option can be offered as an upgrade to cater to digitally evolving practices without increasing base product cost.

10. Strengthen Trade-in Programs and Lifecycle Value Propositions

Survey results indicate that Remidio outperforms competitors in perceived equipment value retention, especially in metro and Tier 2 markets. Institutionalize trade-in programs and highlight this as a unique selling point in both urban and semi-urban segments, especially among mid- to senior-level buyers.

Chapter 7

Conclusion

This study provides an in-depth assessment of ophthalmologists' satisfaction with Remidio's retinal imaging solutions, drawing on feedback from diverse practice settings and experience levels. The results highlight that while Remidio demonstrates strong alignment with clinical expectations, particularly in high-volume urban centers, key opportunities remain to enhance customer experience and commercial outcomes across market segments.

Clinically, the product's performance in **Field of View, Image Quality, and Ease of Use** received consistently high evaluations, affirming its suitability for advanced retinal diagnostics. These attributes were particularly valued by retina specialists and senior ophthalmologists based in metro cities, who reported higher procedure volumes and placed greater emphasis on diagnostic precision. Conversely, practitioners in Tier 2 and Tier 3 cities—often general ophthalmologists operating in standalone clinics—prioritized **portability, ease of use, and affordability**, reflecting operational constraints and broader diagnostic needs.

The commercial dimension of the study revealed that **After-Sales Service, Value for Money, and Warranty terms** were critical factors influencing satisfaction. While Remidio's pricing strategy is largely competitive in semi-metro and Tier 2 markets, it appears less compelling in metro areas, where perceived value and payback period were cited as areas of concern. In Tier 3 settings, limited discounting and slower installation support may hinder product adoption despite strong brand awareness.

Furthermore, the importance of **on-time service delivery** was a recurring theme, particularly among mid-career practitioners managing high patient volumes. Although Remidio scored positively on service parameters in metros and Tier 2 cities, reduced responsiveness and onboarding challenges in Tier 3 markets suggest that further improvements in service infrastructure are warranted.

Finally, the analysis of brand perception indicates high awareness and trust in emerging geographies, especially among early-career clinicians. However, brand differentiation in semi-metro regions remains limited.

Mid-career doctors emerged as the most satisfied and advocacy-prone segment, suggesting potential for targeted engagement initiatives.

In summary, while Remidio's core clinical features are well received, the findings underscore the need for **context-sensitive strategies** tailored by city tier and clinician experience to ensure sustainable customer satisfaction and market expansion.

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