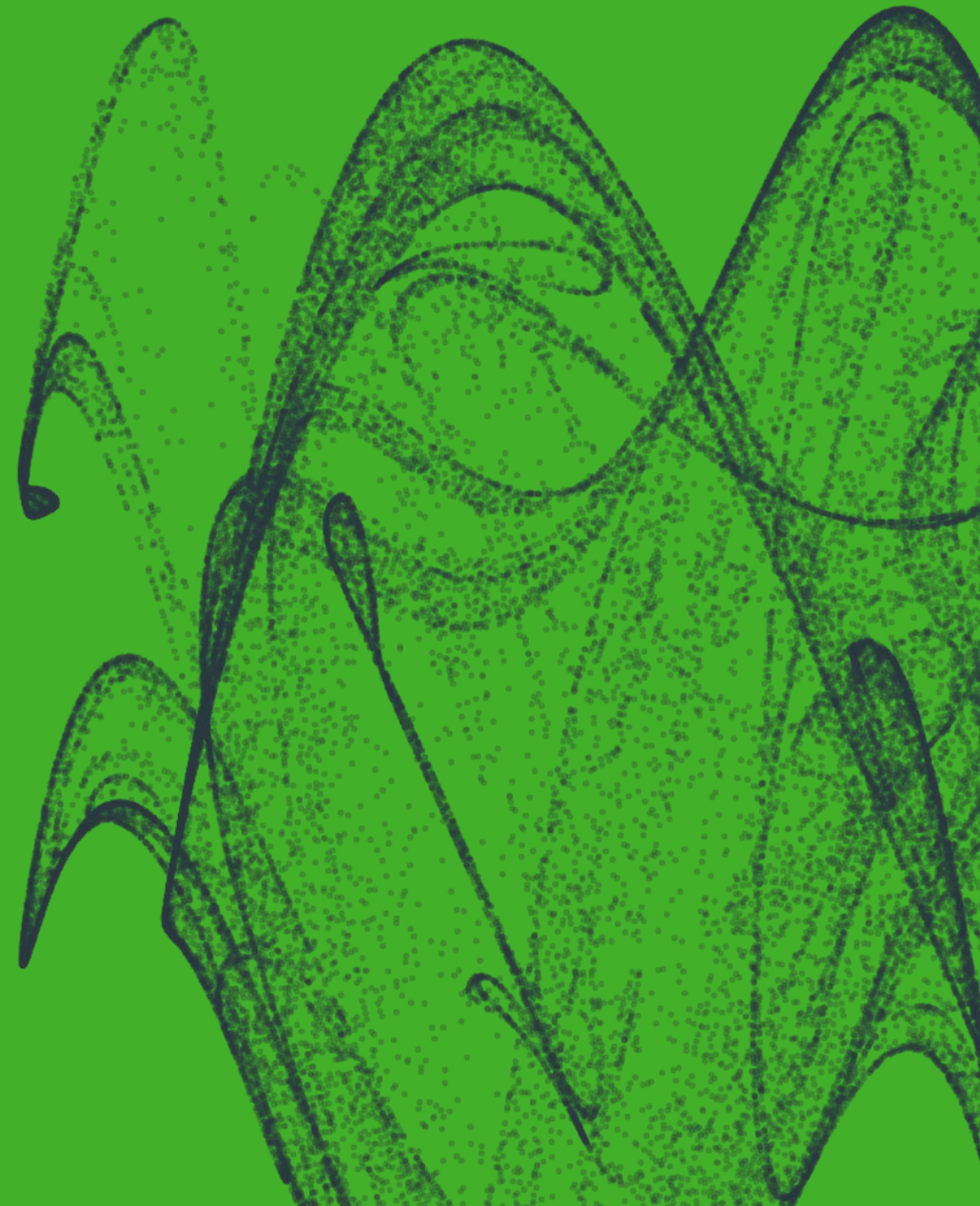




IQVIA Life Sciences Innovation Forum

**Set-up Slides: Maximizing the Value of
Medicines to Patients**

September 14, 2022



Ensuring the right medicines are delivered to the right patients at the right time has been a long-time priority for health systems

This set of 6 levers were the focus of research published back in 2012

Use expensive therapies through predictive diagnostics

Use low-cost generics where available

Increase adherence

Manage polypharmacy

Optimize antibiotic use

Reduce medicine abuse

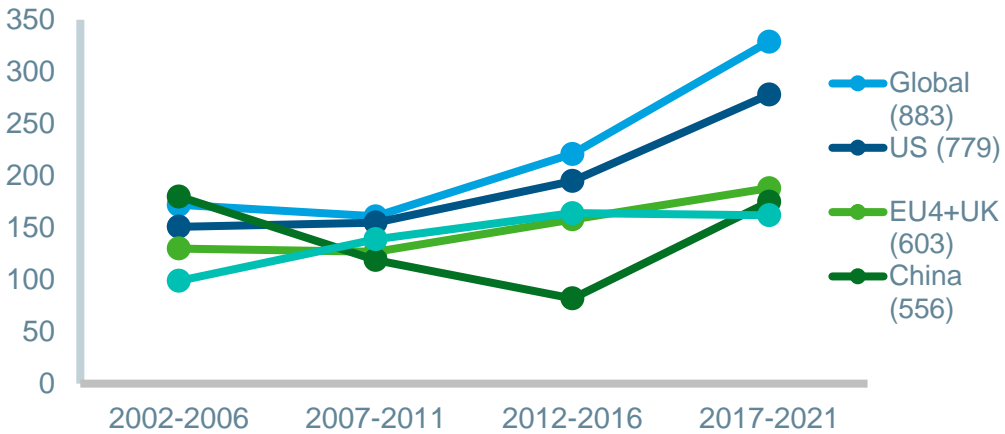


Levers to ensure the right medicines are delivered to the right patients at the right time

Since 2012, ~550 New Active Substances (NAS) have launched and annual medicine spending has reached \$1.4Tn

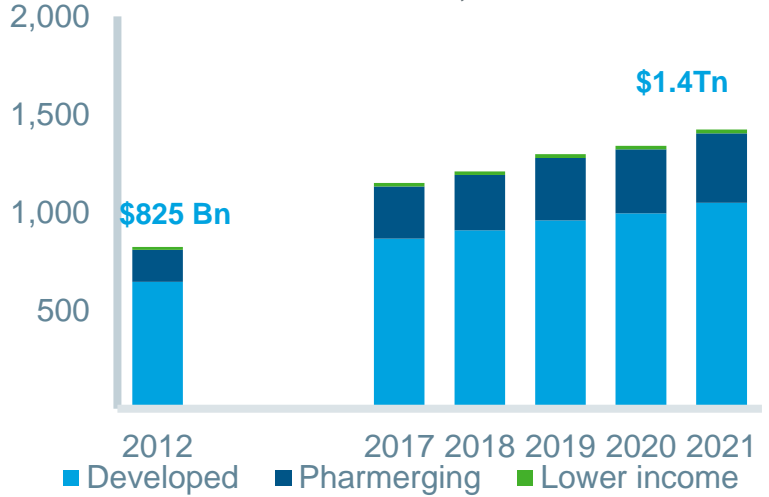
A total of 329 novel active substances have launched globally in the past 5 years, bringing the 20-year total to 883

Number of novel active substances (NASs) launched globally and in selected countries, 2002-2021



Global medicine market has been growing and is estimated to be ~\$1.4Tn in 2021

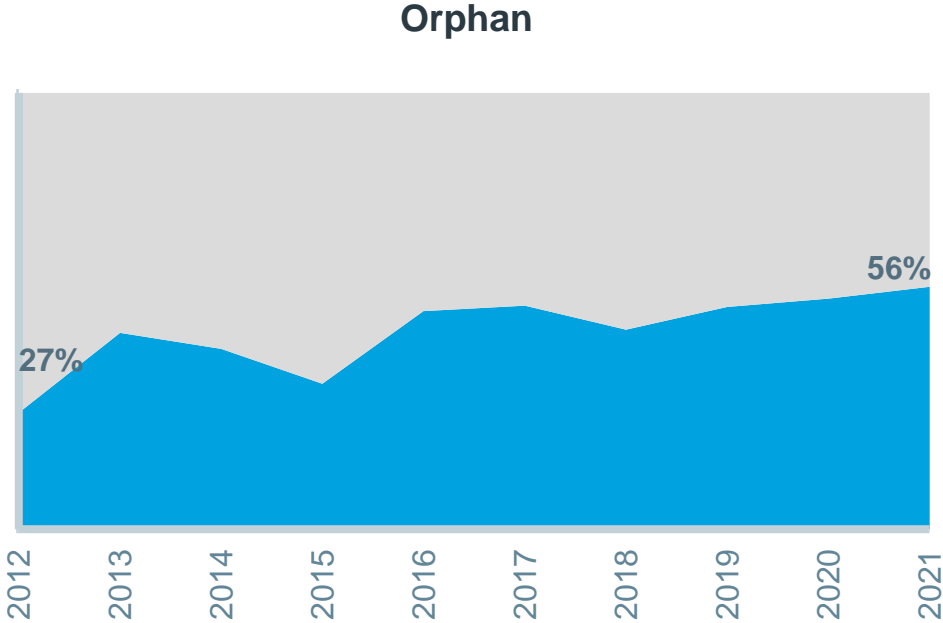
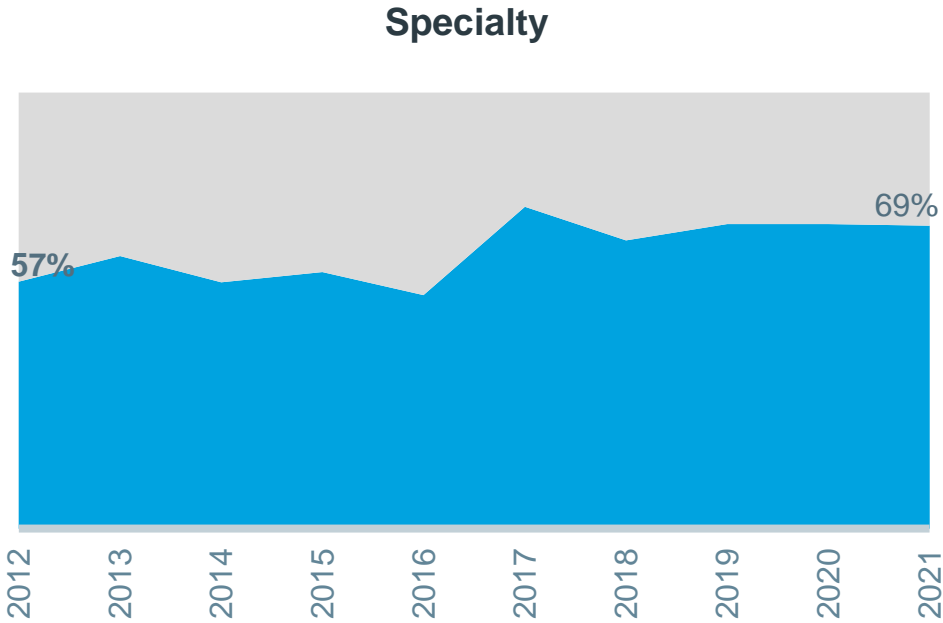
Global medicine market size and growth 2012 & 2017-2021, const US\$Bn



Source: Global use of medicines, IQVIA Institute, 2022; IQVIA Institute Analysis, 2022

Out of the New Active Substances launched, there has been an increasing share of specialty and orphan drugs

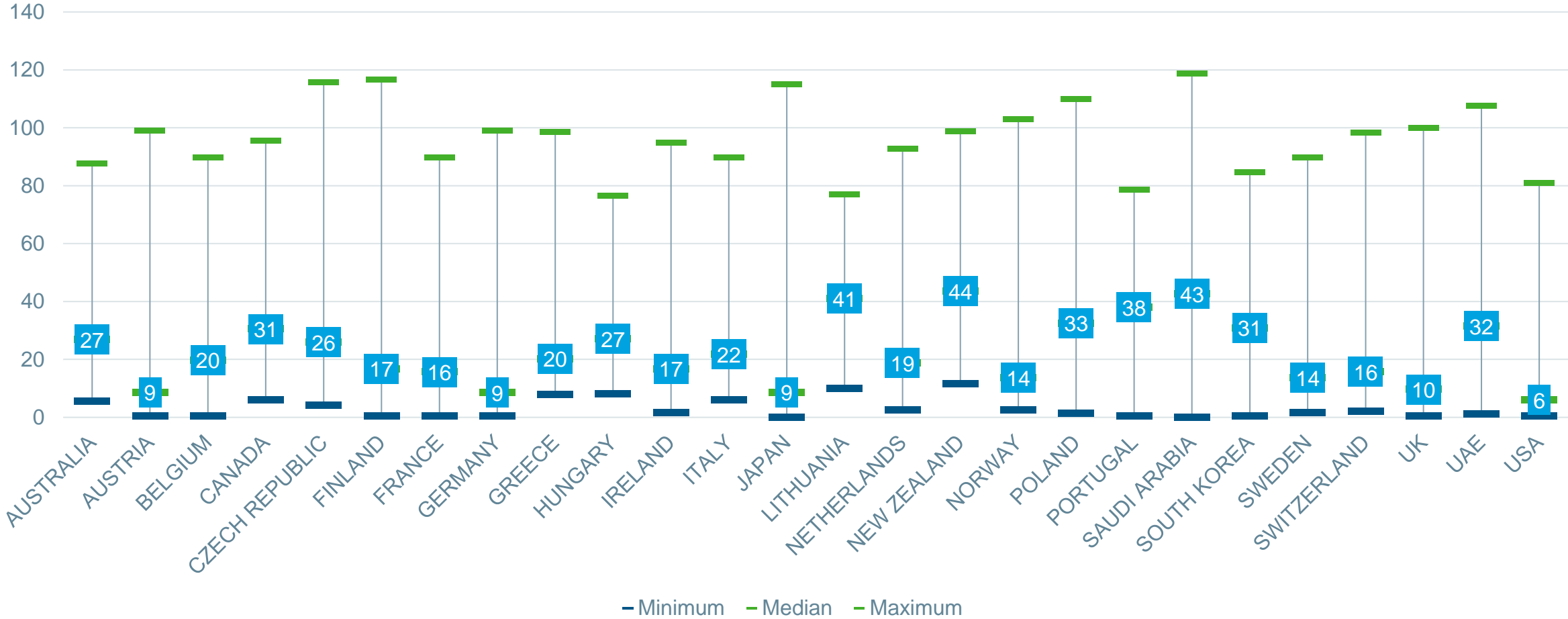
U.S. novel active substance (NASs) by product attributes, 2012-2021



Source: Global Trends in R&D, IQVIA Institute, 2022

However, patient access to these medicines can see delays as the time from global launch to reimbursement can be 6 to 44 months

Time from global launch to country reimbursement (months)

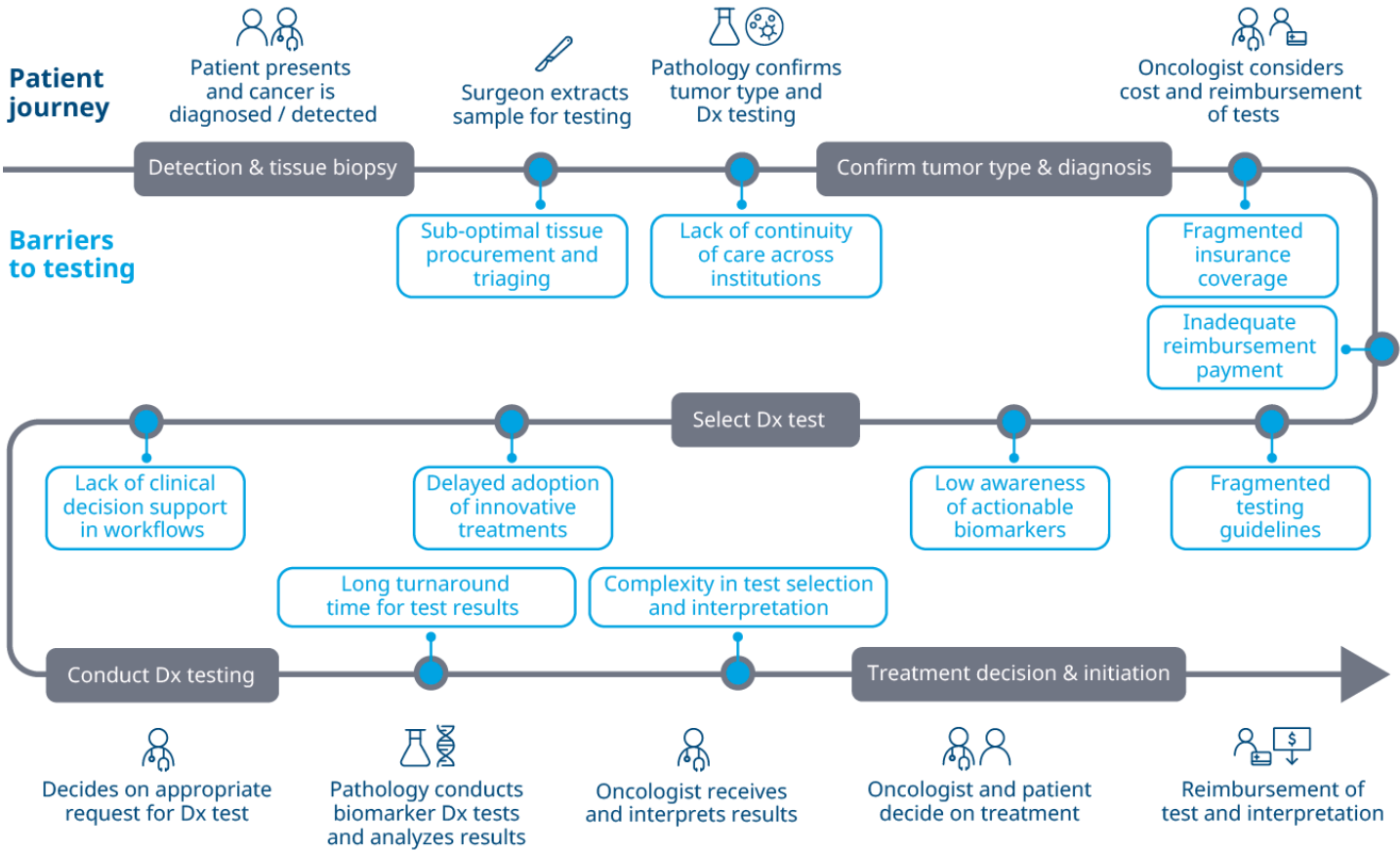


Source: IQVIA Institute, December 2020

>400 drugs have launched in the US with biomarkers; however, several barriers limit the optimal use of these biomarkers

>400

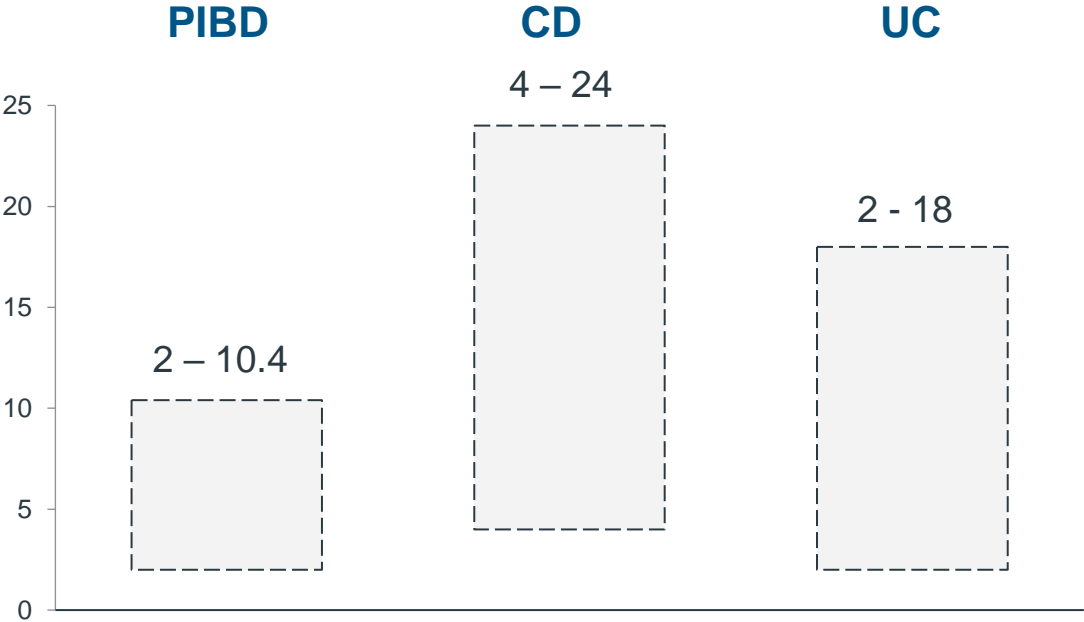
Drug with Pharmacogenomic Biomarkers in Drug Labeling (FDA)



Source: IQVIA, Aug 2020
 Notes: Represents illustrative key steps in the an oncology patient journey and key barriers to biomarker testing.
 Report: Optimizing Oncology Care Through Biomarker Adoption: Barriers and Solutions. IQVIA Institute for Human Data Science, August 2020

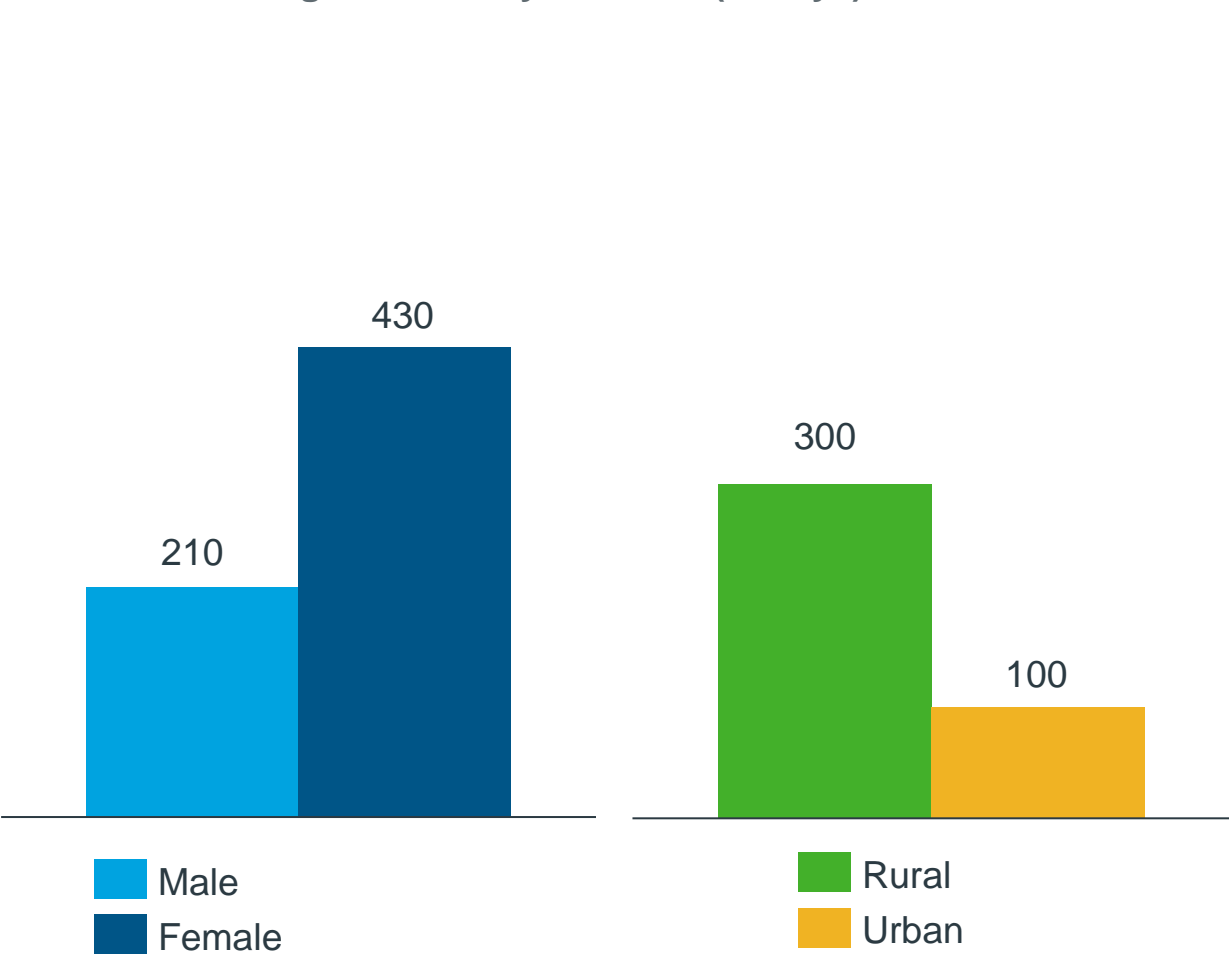
Diagnostic delays exist in several conditions and can impact the delivery of appropriate care

Diagnostic Delay in Pediatric Inflammatory Bowel Disease, Crohn's Disease and Ulcerative Colitis (In Months)



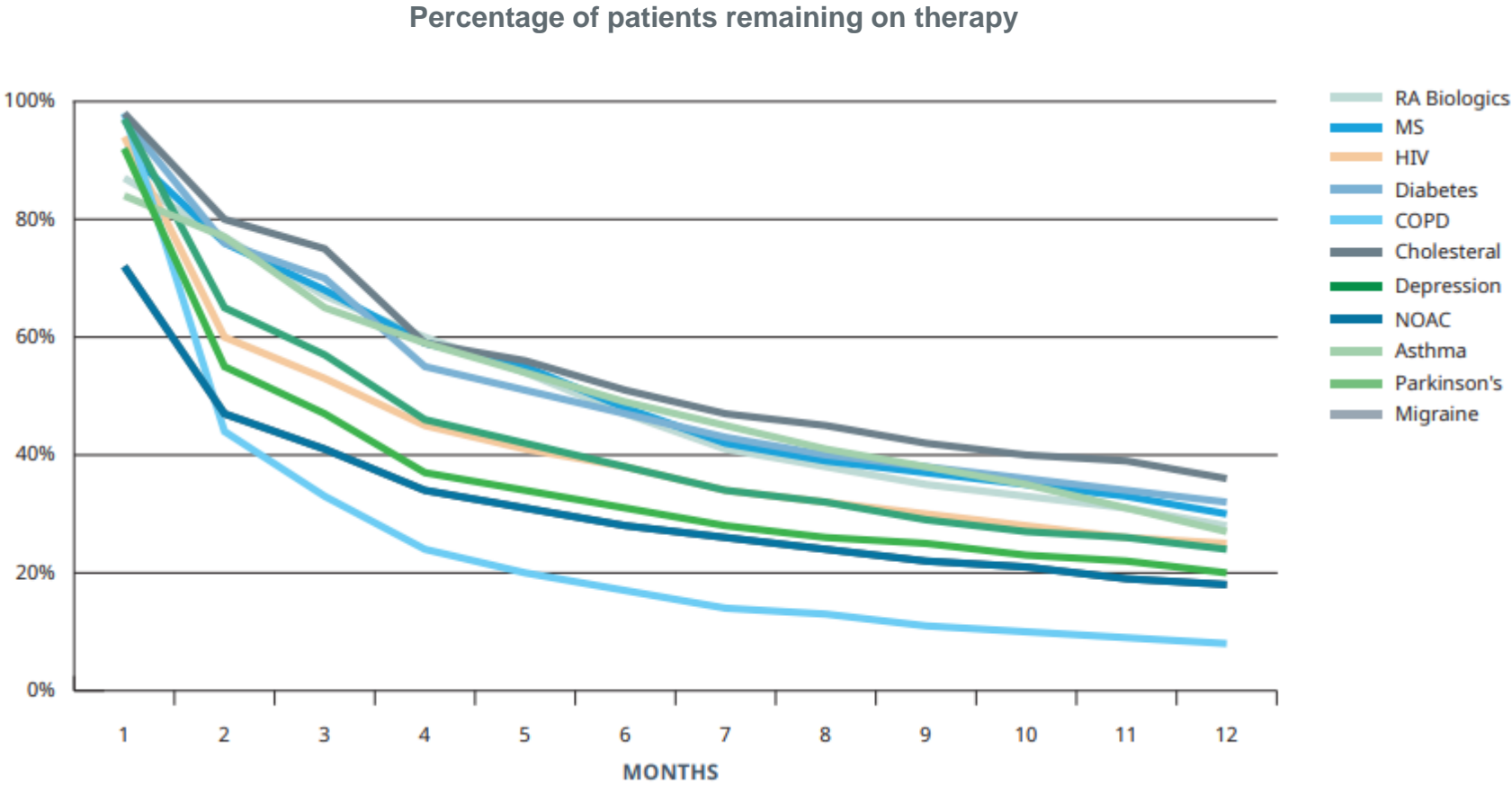
Diagnostic delays have been linked to increase in need for surgeries

Diagnostic Delay in COPD (In days)



Source: Analysis of diagnostic delay and its influencing factors in patients with chronic obstructive pulmonary disease: a cross-sectional study, Nature, Dai et al, 2021
 Source: Diagnostic Delay in Pediatric Inflammatory Bowel Disease: A Systematic Review, Ajar et al, 2022

Patient adherence remains a challenge with <50% of patients persisting on treatment after 1 year for several conditions



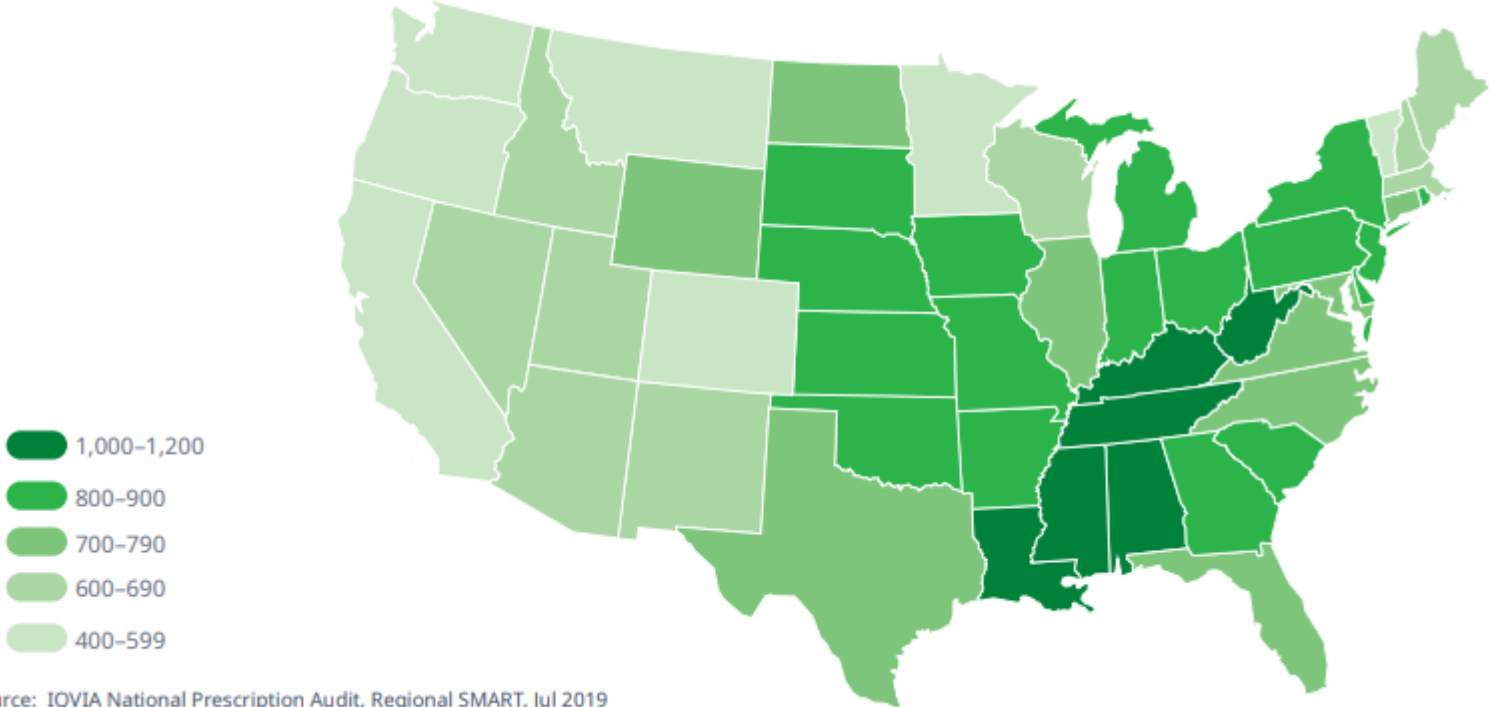
Source: 12-month persistence, IQVIA LAAD Claims Data

47 million unnecessary antibiotic prescriptions are written in the U.S. each year, contributing to antibiotic resistance

According to the CDC, 47 million unnecessary antibiotic prescriptions are written in the United States each year

Mapping of Antibiotic prescriptions per 1000 people shows variability by state

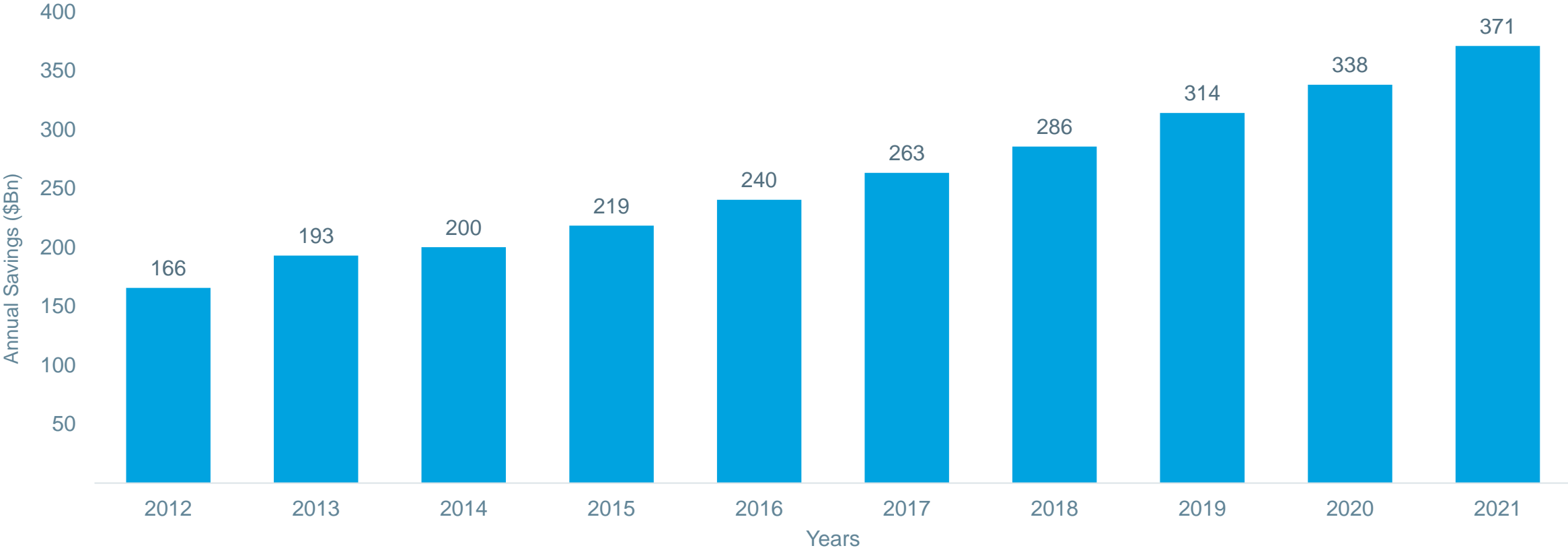
Antibiotic prescriptions per 1,000 people by state, 2018



Source: IQVIA National Prescription Audit, Regional SMART, Jul 2019

Savings from biosimilar and generic use are increasing, however, biosimilar use remains variable and further savings are possible

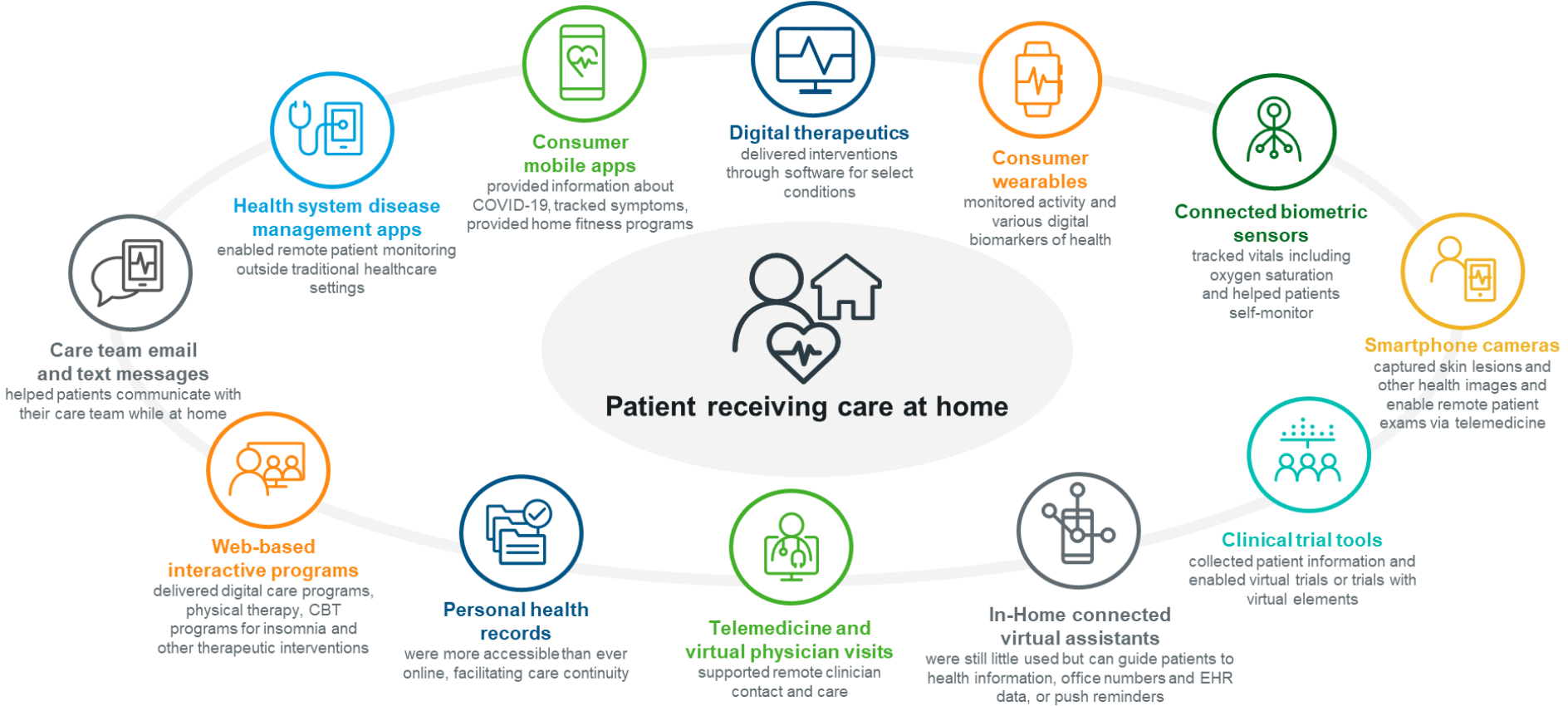
Annual Savings from Generics in USA (\$Bn)



U.S. Biosimilar share of accessible market (Q4 2021) – 37%

Source: IQVIA MIDAS, IQVIA Institute Analysis

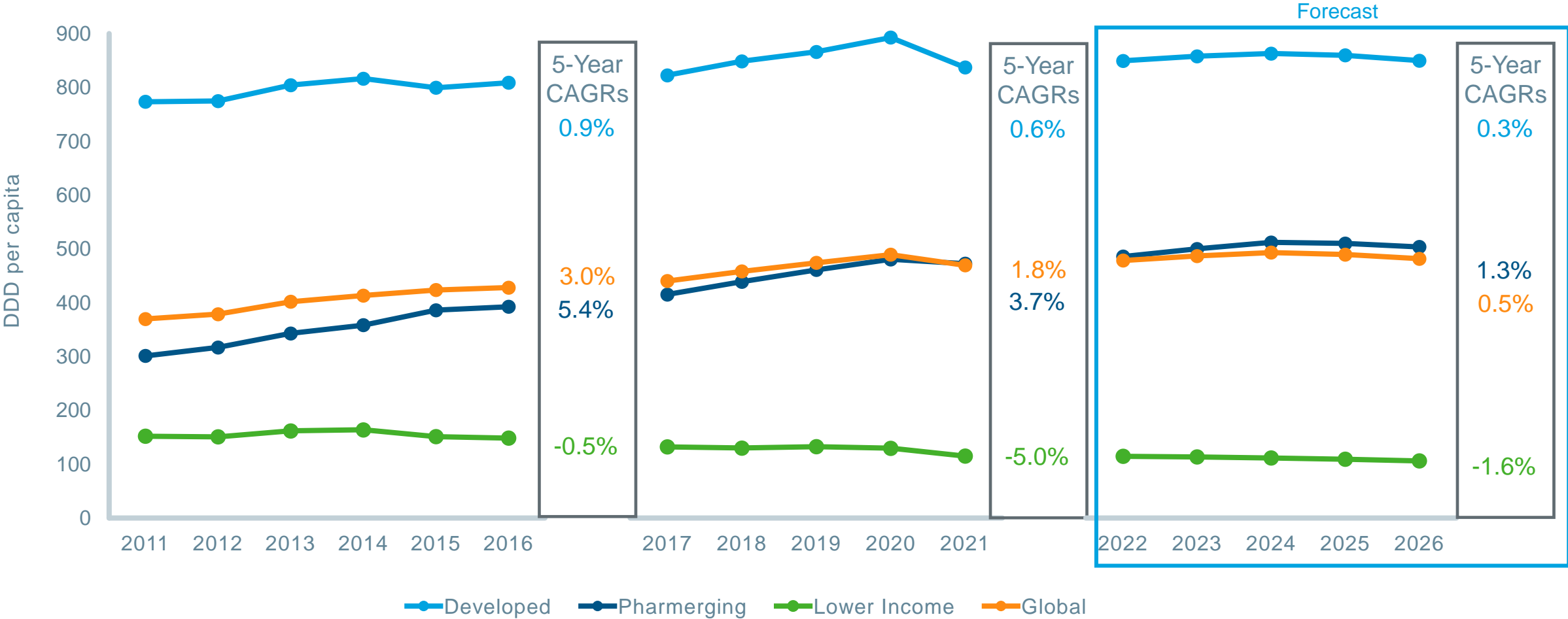
Home care and associated technologies are growing in importance & will play a crucial role in management of medicines



Digital Health Trends 2021 - Innovation, Evidence, Regulation and Adoption. Report by the IQVIA Institute for Human Data Science.
Source: IQVIA Institute, Jun 2021

Achieving equity in medicine use is critical as per capita use in developed countries is nearly double of pharmerging use

Historical and projected per capita use of medicine by segment, 2011–2026



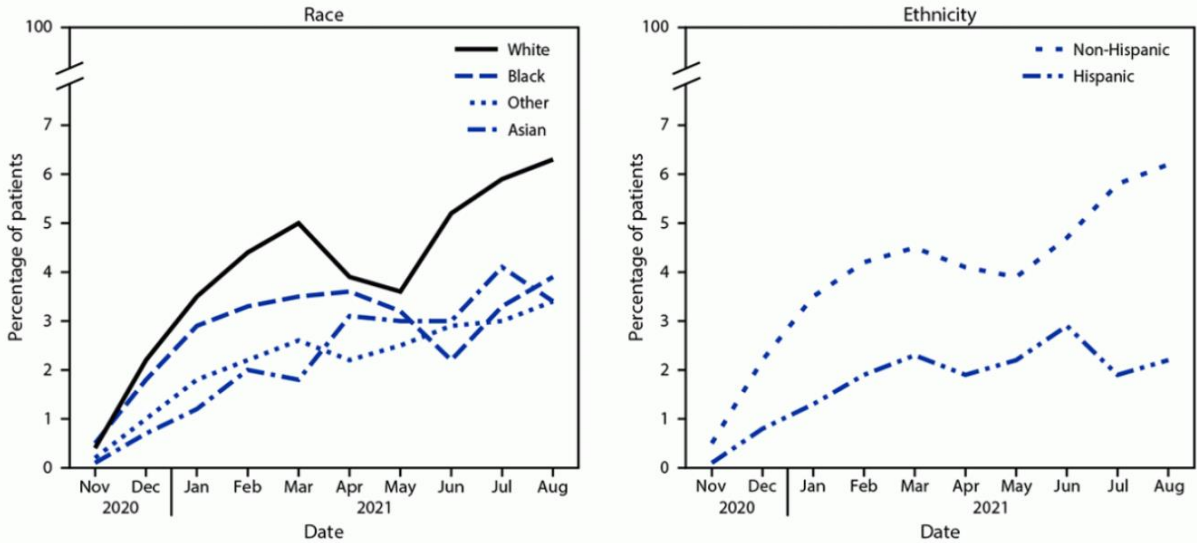
Source: Global use of medicines, IQVIA Institute, 2022

Equity of medicine use is also impacted by socioeconomic and race/ethnicity resulting in varying healthcare outcomes

Lower use of monoclonal antibody treatment among Black, Asian, and Other race and Hispanic patients with positive SARS-CoV-2 test results, relative to White and non-Hispanic patients

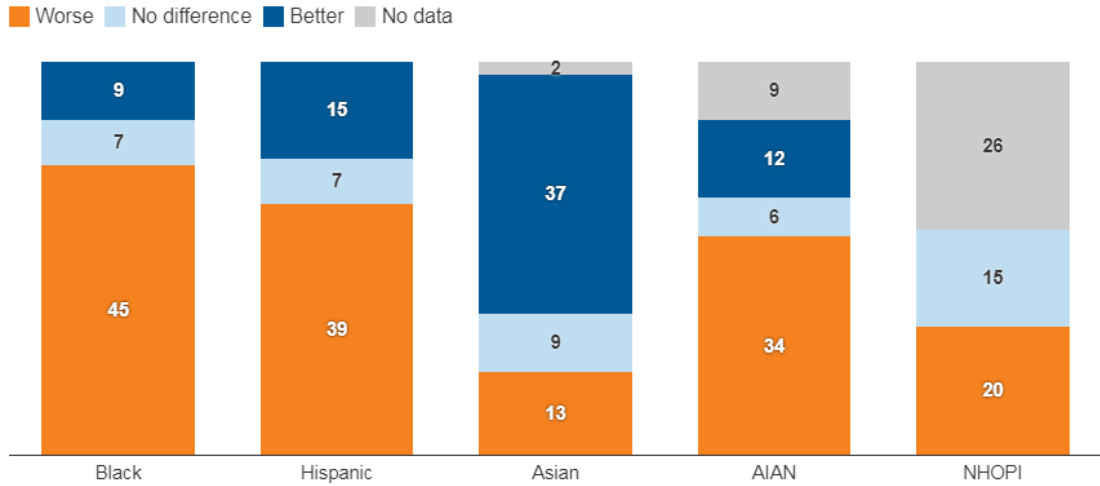
Black, Hispanic, and AIAN people fare worse than White people across the majority of examined measures

FIGURE. Monthly* percentage of COVID-19 patients (n = 805,276) receiving monoclonal antibody treatment,† by race§ and ethnicity¶ 41 health care systems in the National Patient-Centered Clinical Research Network — United States, November 2020–August 2021



Health and Health Care among People of Color Compared to White People

NUMBER OF MEASURES FOR WHICH GROUP FARED BETTER, THE SAME, OR WORSE COMPARED TO WHITE PEOPLE:



NOTE: Measures are for the most recent year for which data are available. "Better" or "Worse" indicates a statistically significant difference from White people at the p<0.05 level. No difference indicates no statistically significant difference. "Data limitation" indicates no separate data for a racial/ethnic group, insufficient data for a reliable estimate, or comparisons not possible due to overlapping samples. AIAN refers to American Indian or Alaska Native. NHOPI refers to Native Hawaiian or Other Pacific Islander. Persons of Hispanic origin may be of any race but are categorized as Hispanic for this analysis; other groups are non-Hispanic.