

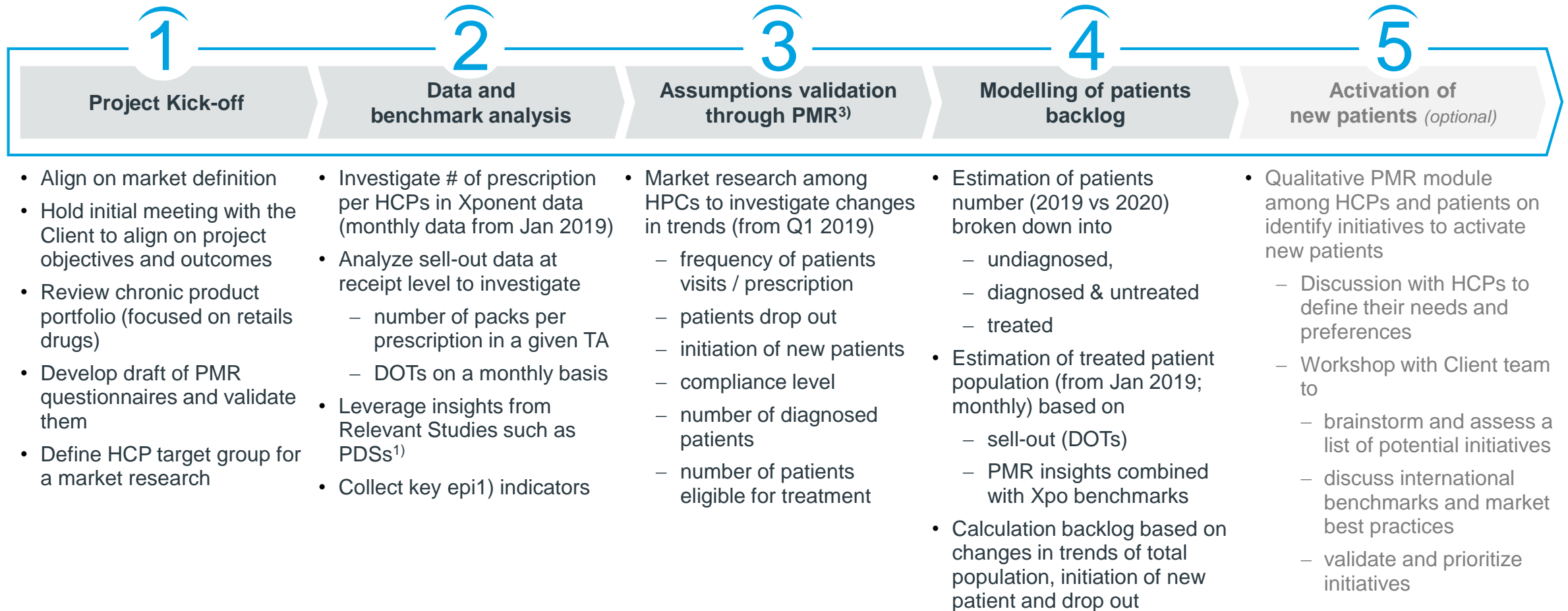
# Estimation of patient backlog

*Project overview*

2020

# Chronic patient backlog analysis relies on modeling various sources of data

## Project approach overview



# Data analysis will reveal general markets trends and will be the main input in the model

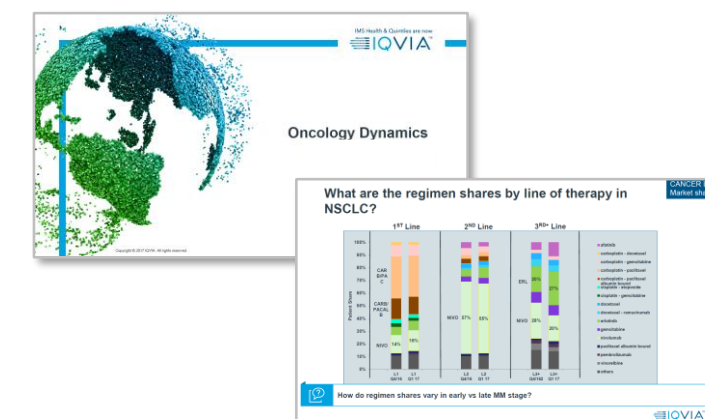
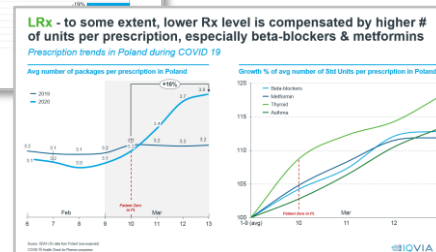
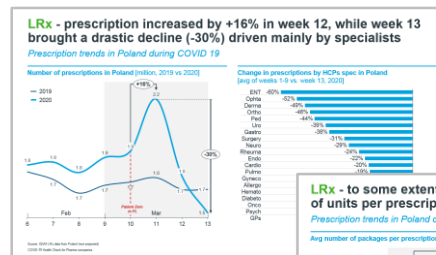
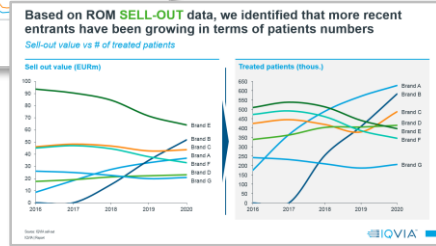
Phase 1: Suggested market definition for Romania

Phase 2: Data analysis

## Key activities

- Investigate # of prescription per HCPs in Xponent data (monthly data from Jan 2019)
- Analyze sell-out data at receipt level to investigate
  - number of packs per prescription in a given TA
  - DOTs on a monthly basis
- Leverage insights from relevant Studies
- Collect key epidemiological indicators and conduct cross country comparison (e.g. prevalence)

## Illustrative deliverables



# Insights obtained in the PMR study are used as a base for future assumptions and model development

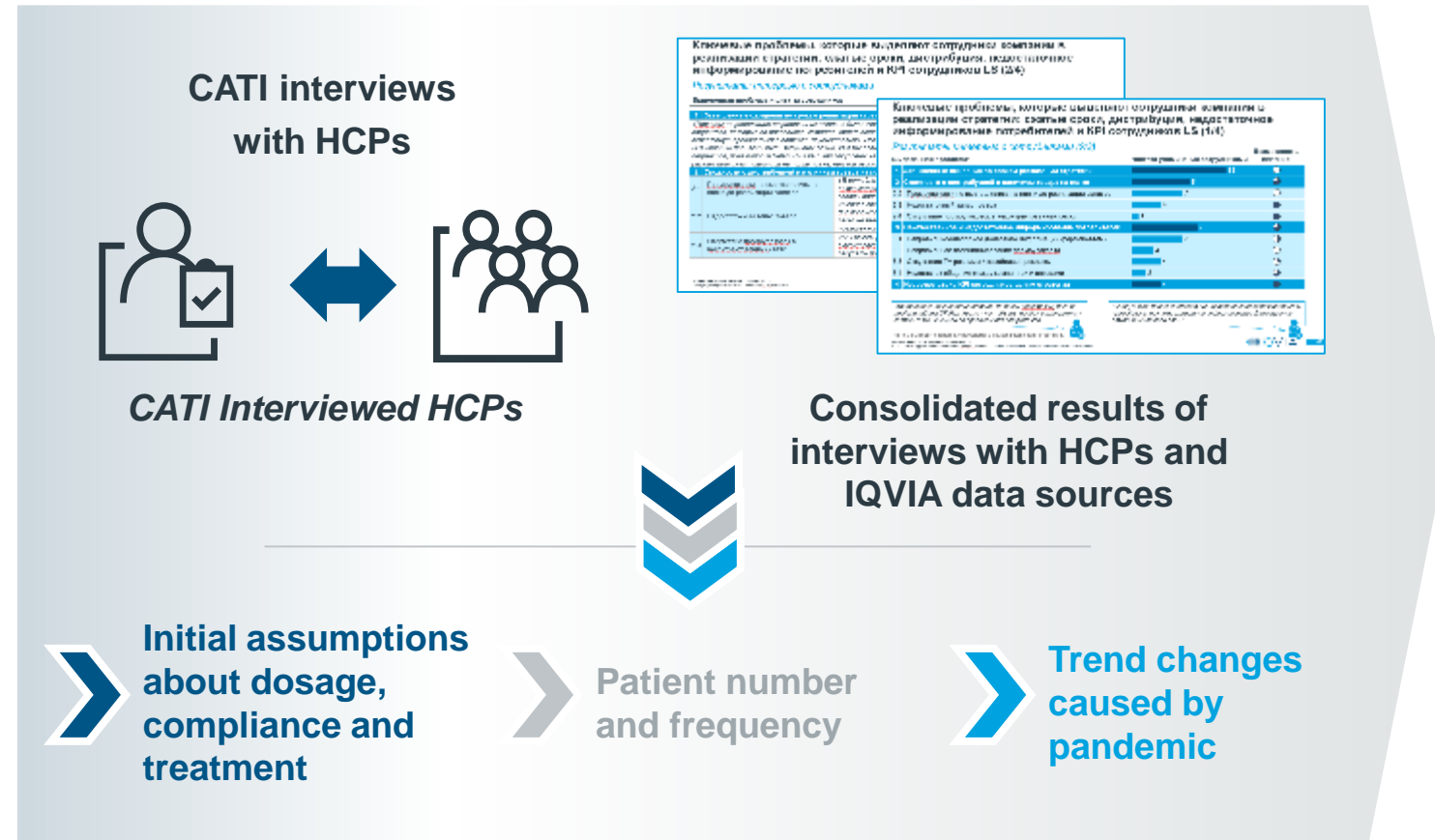
## Phase 3: Market research

### Key activities

Market research among HCPs to investigate changes in trends (from Q1 2019)

- Use initial data to prepare the sample list for the PMR study based on predefined agreed attributes (ex. location, call pressure, initial est. potential). Selection criteria will be previously agreed (e.g. HCPs in urban area, split to ensure proper regional distribution, and high number of patients/ high number of prescription)
- Run **CATI** interviews **with selected sample** to get insights on:
  - frequency of patients visits / prescription
  - patients drop out
  - initiation of new patients
  - compliance level
  - number of diagnosed patients
  - number of patients eligible for treatment
- **Structured questionnaire**

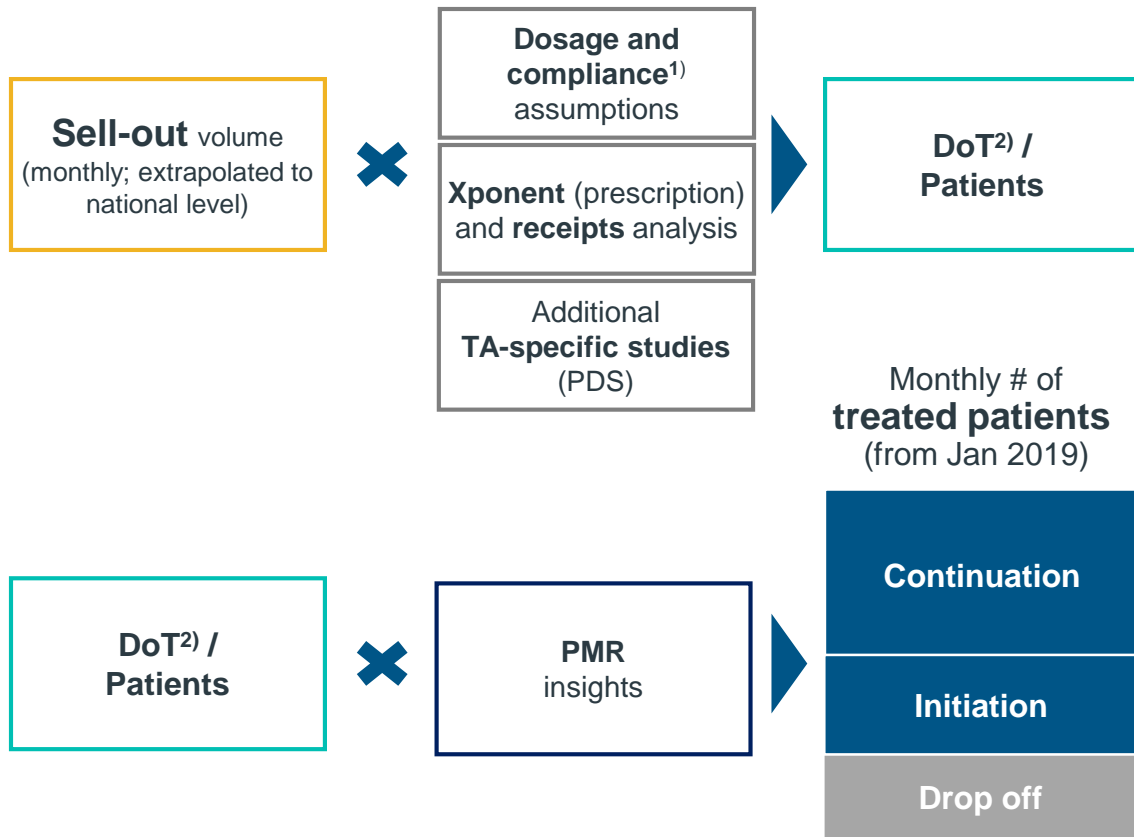
### Illustrative examples of deliverables



# IQVIA performs data triangulation in order to prepare the most accurate estimation of the patient gap

## Phase 4: Estimation of patient backlog

### Treated patients



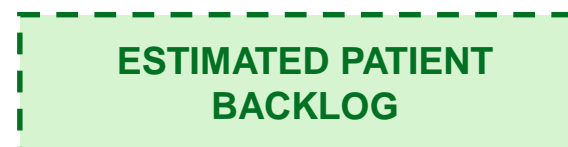
Note: 1) based on PMR insights 2) Days on Treatment

### Patient backlog

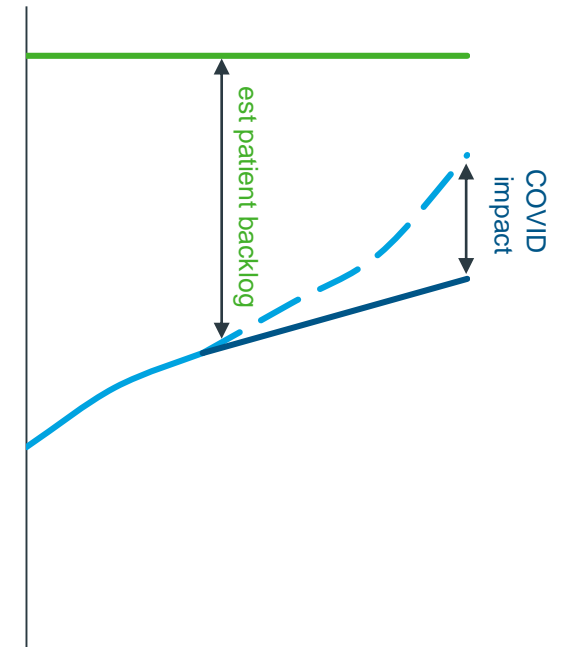
#### # of treated patients



VS



- Treated patients (pre-COVID)
- Treated patients (post-COVID)
- Patient eligible for treatment



# Various potential ideas will be tested to facilitate development of optimal set of activation initiatives for the client

## Phase 5: Activation of new patients (optional)

### Key activities

Qualitative PMR module among HCPs and patients on identify initiatives to activate new patients

- Discussion with HCPs to define their needs and preferences
- Workshop with client team to
  - brainstorm and assess a list of potential initiatives
  - discuss international benchmarks and market best practices
- validate and prioritize initiatives for the client

### Illustrative examples of deliverables

#### Physicians & others



- Campaign raising **awareness** on importance of diagnostics/Tx initiation and Tx compliance
- Educational materials/brochures emphasizing need of diagnostics and therapy compliance/**trainings** for HCPs
- Platform for HCPs **peer-to-peer** knowledge exchange and discussions
- Therapy area specific **microsites**, it enables HCPs to connect, network and share knowledge among peers
- Modification of **communication content and patterns** used by sales force
- Training program for **pharmacists** to improve quality of their recommendation

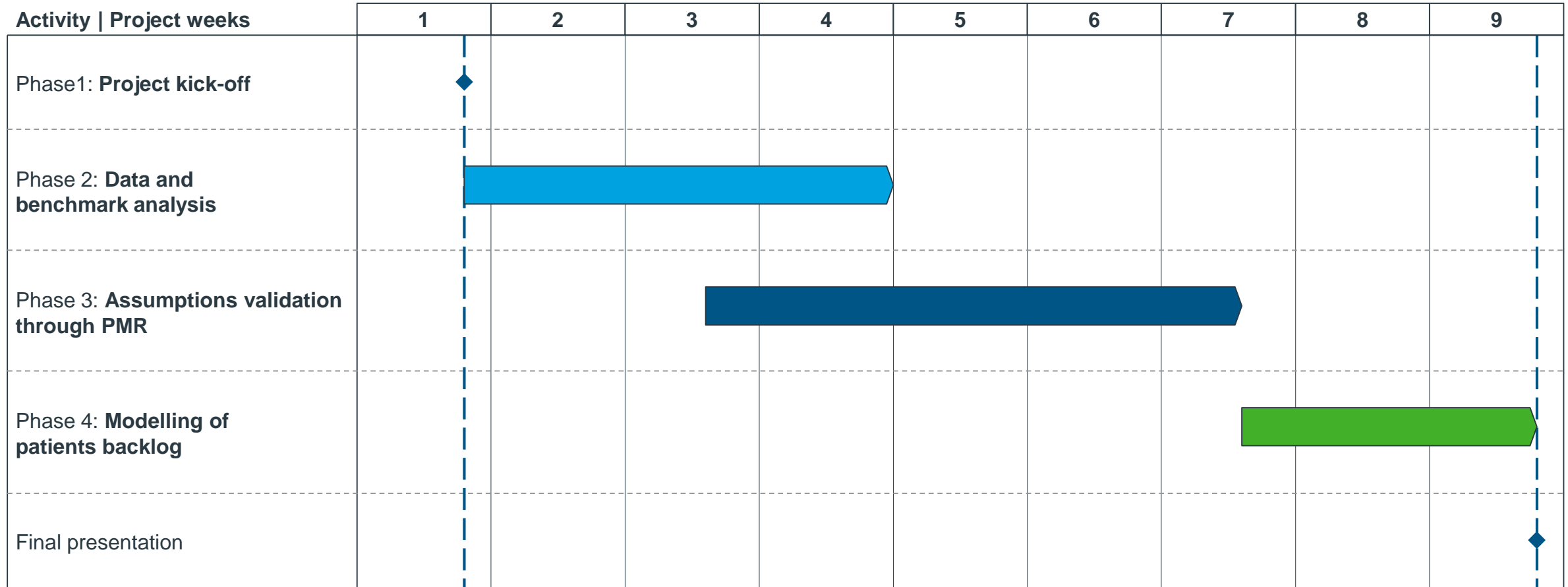
Long-list of value enhancing /activation services

Prioritized value enhancing /activation services

Idea	Brief description	Value added for Healthcare	Importance for BI?
Online Chatbot	Product relevant online chatbot to answer queries, raise disease awareness and marketing campaign	<ul style="list-style-type: none"> <li>• Patient convenience/satisfaction</li> <li>• Reduce complications</li> </ul>	<ul style="list-style-type: none"> <li>• Customer loyalty</li> <li>• Competitive differentiation</li> </ul>
Patient-HCP Connect App	Patients/caregivers, physicians can connect over a single platform. Also increase adherence rates by connecting patients and HCPs	<ul style="list-style-type: none"> <li>• Improved treatment adherence</li> <li>• Reduce complications</li> <li>• Patient satisfaction</li> </ul>	<ul style="list-style-type: none"> <li>• Rx volume</li> <li>• Outcome of treatment</li> <li>• HCP acquisition</li> </ul>
Disease Management Platform	App for caregiving tips, Medication reminders to patients, also HCP connect for remote monitoring of long term treatment	<ul style="list-style-type: none"> <li>• Patient loyalty</li> <li>• Adherence</li> </ul>	<ul style="list-style-type: none"> <li>• Awareness creation</li> <li>• HCP satisfaction</li> <li>• Rx volume</li> </ul>
Peer - Peer Webcast	Sponsor for streaming CME video presentations, panel discussions and case presentations for drugs of respiratory, anti-infectives etc.	<ul style="list-style-type: none"> <li>• Reputation in the healthcare</li> <li>• Research grants</li> <li>• Network development</li> </ul>	<ul style="list-style-type: none"> <li>• Promote brand awareness</li> <li>• Rx influence</li> <li>• Customer acquisition</li> </ul>
Hcp Space	Therapy area specific microsites, it enables HCPs to connect, network and share knowledge among peers	<ul style="list-style-type: none"> <li>• Best practice sharing</li> <li>• Cross learnings</li> </ul>	<ul style="list-style-type: none"> <li>• Promote brand awareness</li> <li>• Rx influence</li> </ul>
Scientific Selling	Enabling Clinical Excellence for HCPs on the Care Pathway through Digital means. Focus on chronic disease where clinical practice unmet need is high	<ul style="list-style-type: none"> <li>• Improved clinical excellence</li> <li>• HCP satisfaction levels</li> <li>• Society recognition</li> </ul>	<ul style="list-style-type: none"> <li>• Company loyalty</li> <li>• Position as science based company</li> </ul>
Virtual Care Apps	Patients returning home with ongoing bandage/healing from the intensive care unit on-demand coaching from a nurse could be provided to monitor the healing process and guide the patient	<ul style="list-style-type: none"> <li>• Improved treatment outcome</li> <li>• Adherence</li> <li>• Reduce clinic revisits</li> </ul>	<ul style="list-style-type: none"> <li>• Acquire HCPs</li> <li>• Increased Rx volume</li> <li>• Reputation of Tabuk brand</li> </ul>
Live	Platform to create live-remote detailing to improve the reach of	<ul style="list-style-type: none"> <li>• Research update to HCP</li> </ul>	<ul style="list-style-type: none"> <li>• Increase HCP reach</li> </ul>

# Phase 1 to Phase 4 of the project can be delivered in 9 weeks and can be run simultaneously in other countries of interest

## Project timeline

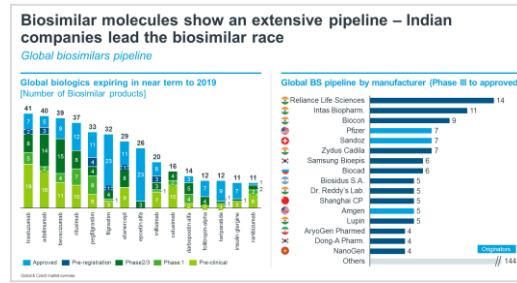
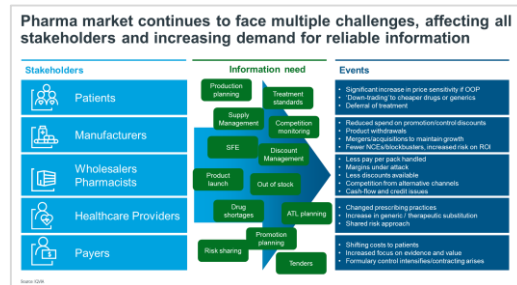


# Expert insights based on thorough research combined with IQVIA data sets, will be the base for the backlog estimation

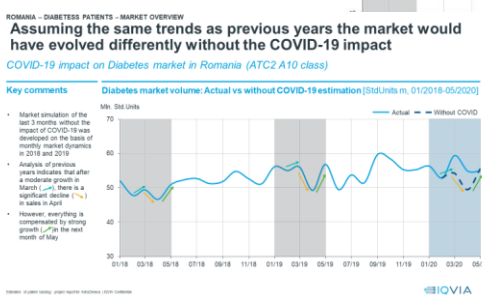
Indicative outcome and deliverables

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## Market trends



## Estimation assumption



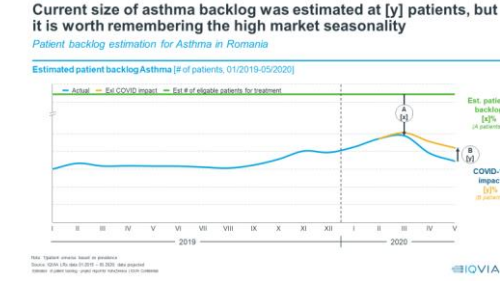
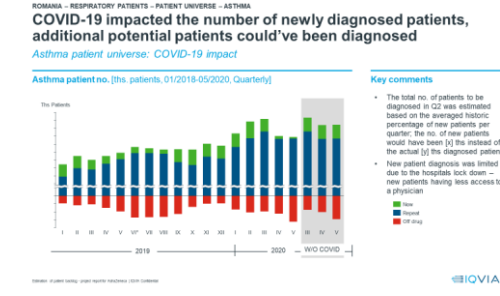
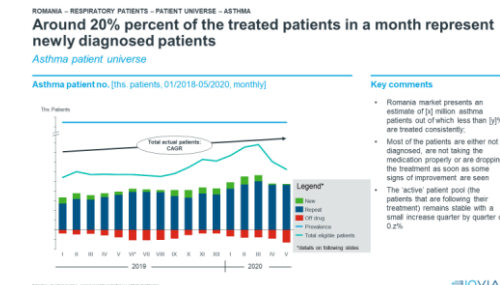
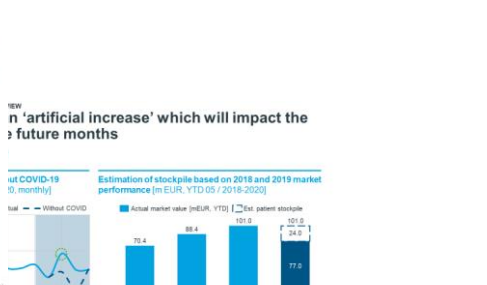
**ROMANIA - DIABETES PATIENTS - KEY ASSUMPTIONS FOR PATIENT ESTIMATION**

In order to estimate the patient universe IQVIA set ground assumptions based on available information and limitations (1/7)

Key model assumptions

Outcome	Input	Assumption
Equipment no. of pack of treatment (DOTs)	Number of doses in a pack	Assumed average dose per SPU for all based on COVID
Compliance rate	Average recommended dose per day	Dose adjustment made by patient not considered
Treatment schemes	Compliance rate	Assumed the compliance rate being different for insulin dependent and non insulin dependent
No. of treated patients	Market insights from previous studies (PDR)	Assumed metformin and classic insulin can be used as main patient markers
Class of eligible patients	Market insights from previous studies (PDR)	No. of patients is direct correlated with no. of metformin and insulin sold on market
Split of patient type	Based of number of sold units	Assumed correlation between sales volume and patient count weighted by compliance assumed for metformin products and insulin, and then extrapolated for other treatment schemes
	Prevalence results as compliance weights	Assumed number of patients diagnosed but not treated (patients which are not following the treatment at all)
	No. of treated patients	Assumed the prevalence estimated in Romania and estimated the gap patients
	Diabetic prevalence of Diabetes in Romania	Assumed similar behavior of Polish and Romanian market in terms of patients split
	Market insights	
	Poland LRFs benchmark	

## Results

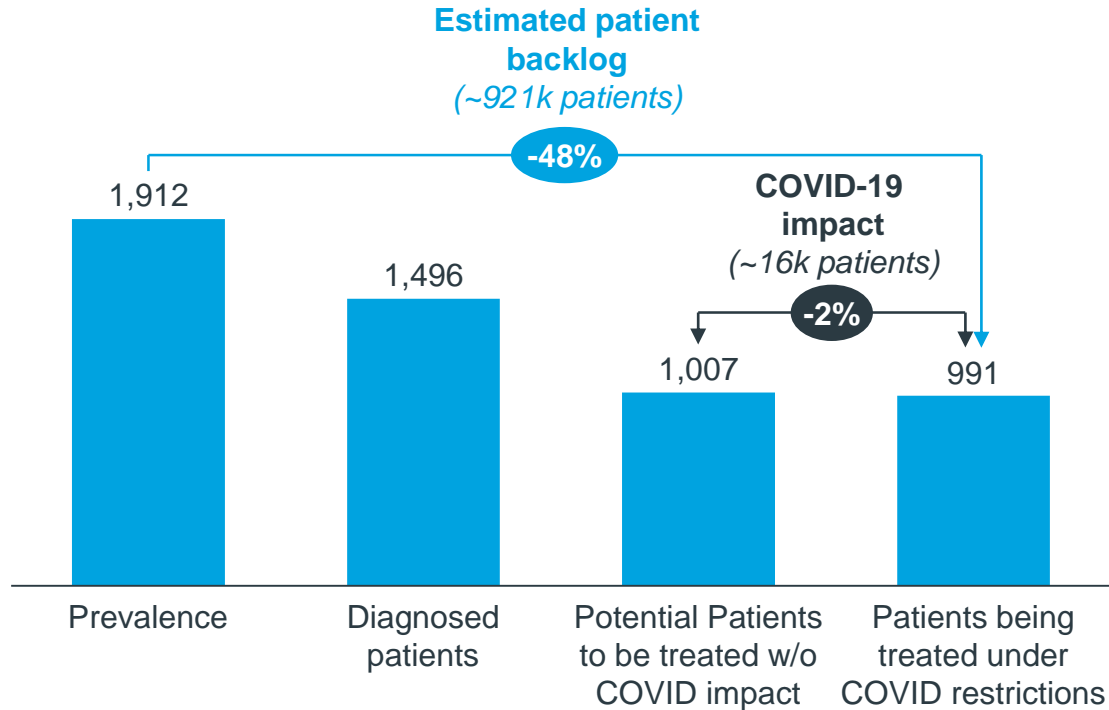


# The number of Patients starting treatments have decreased across diabetes and asthma

*Patient backlog estimation for chronic patients in Romania*

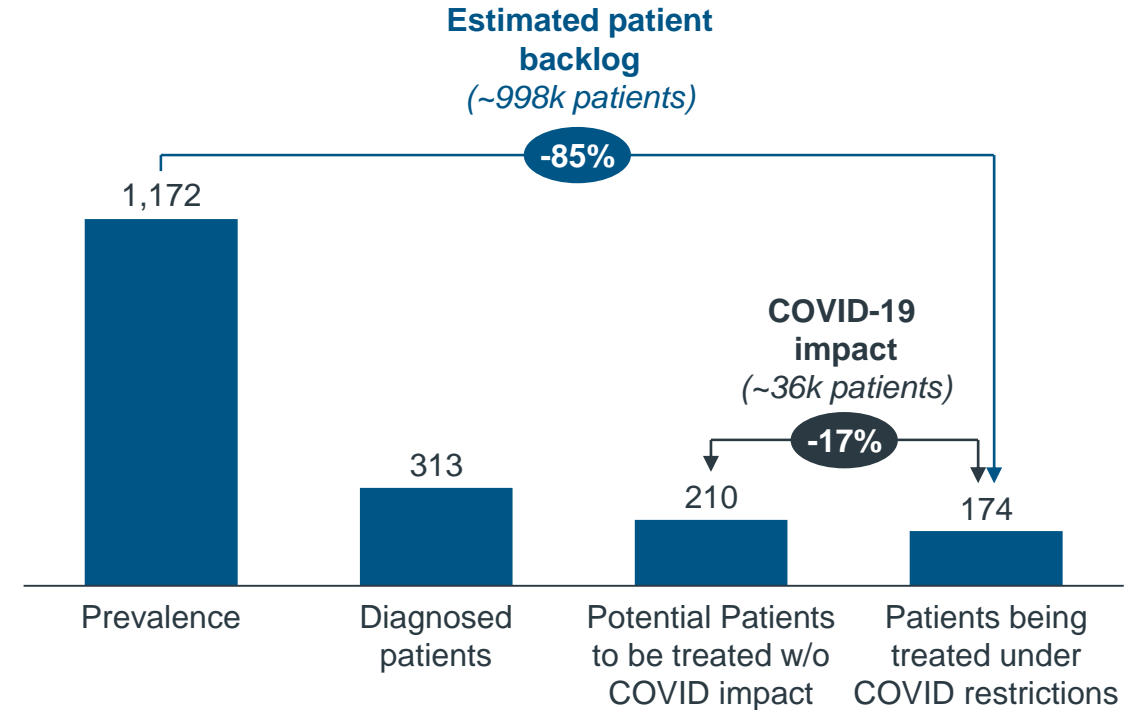
## Estimated diabetes patients' backlog

[# of '000 patients, April/May 2020]



## Estimated asthma patients' backlog

[# of '000 patients, May 2020]



# CONTACT US

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