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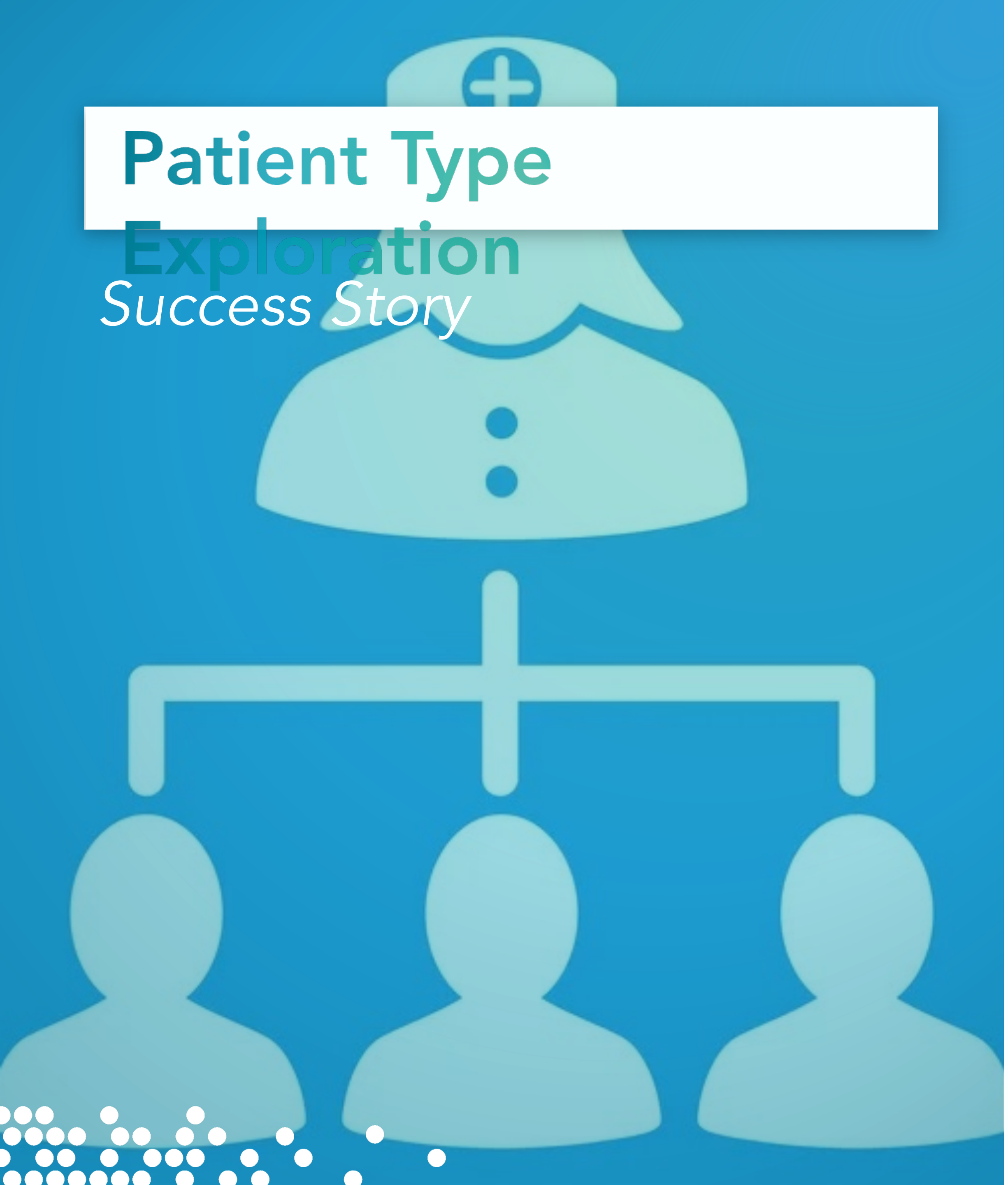
In-Market Assessment



Patient Type Exploration

Success Story

The Challenge:

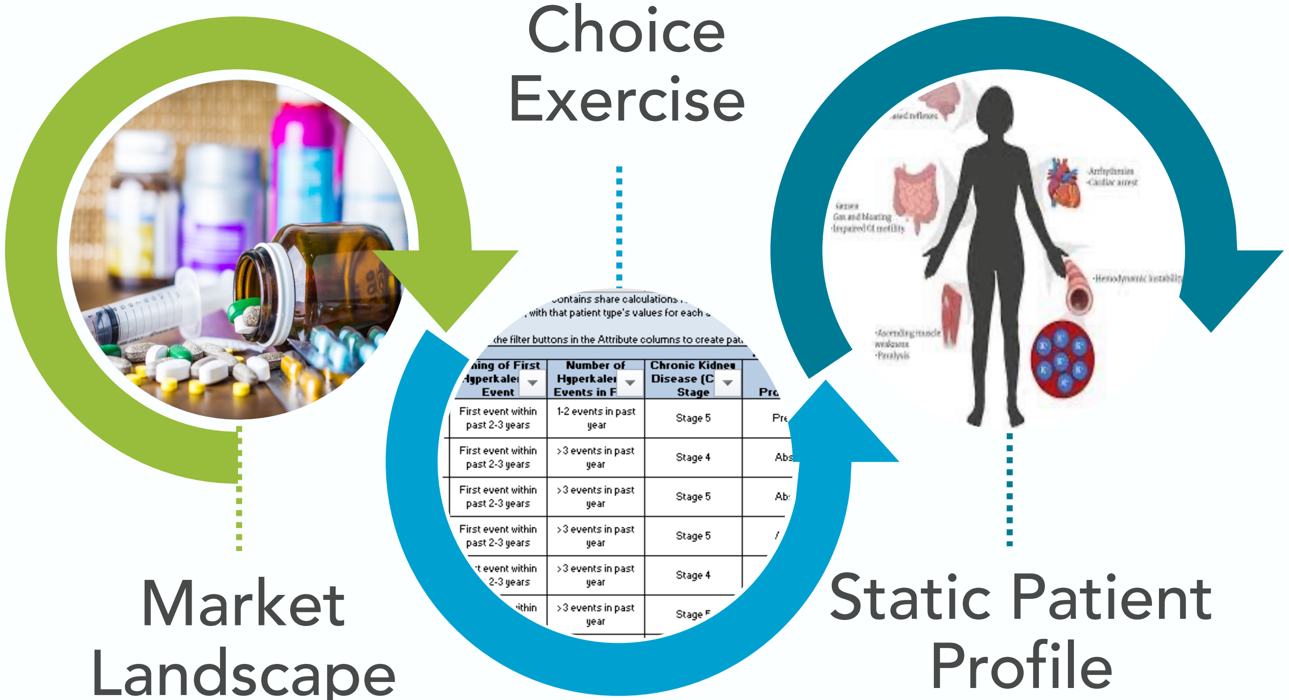
Aim to increase products share among patients by identifying how it and its competitors are perceived by HCPs

The Client:

A well-known, international pharmaceutical company

Our Approach

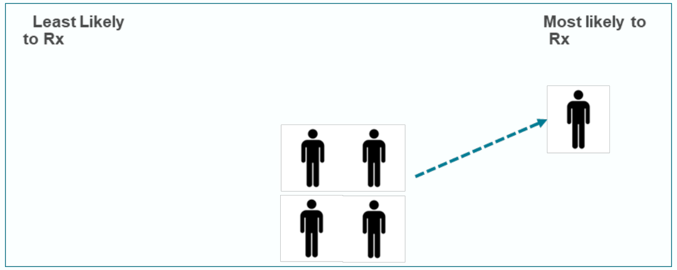
A holistic approach with qualitative and quantitative blended methodology

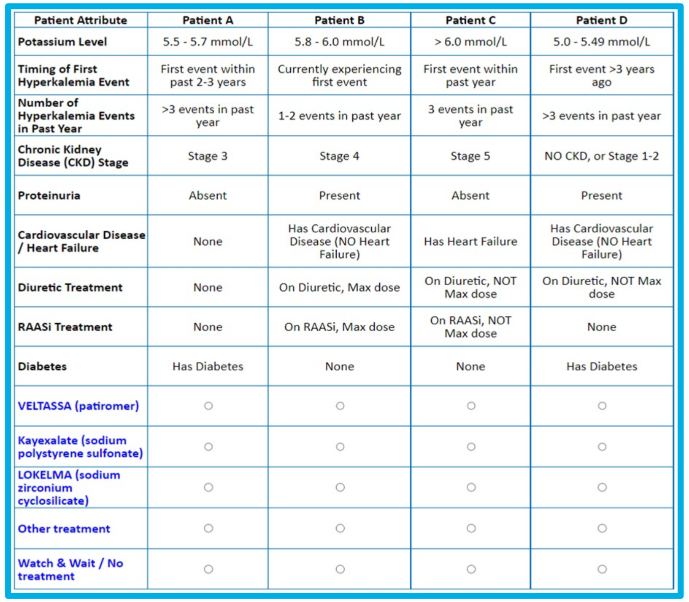

contains share calculations
with that patient type's values for each
the filter buttons in the Attribute columns to create pat
Timing of First Hyperkalemia Event
Number of Hyperkalemia Events in Past Year
Chronic Kidney Disease (CKD) Stage
First event within past 2-3 years
1-2 events in past year
>3 events in past year
Stage 5
Stage 4

Situational Choice Exercise

Market Landscape

Static Patient Profile Assessment


Least Likely to Rx
Most likely to Rx



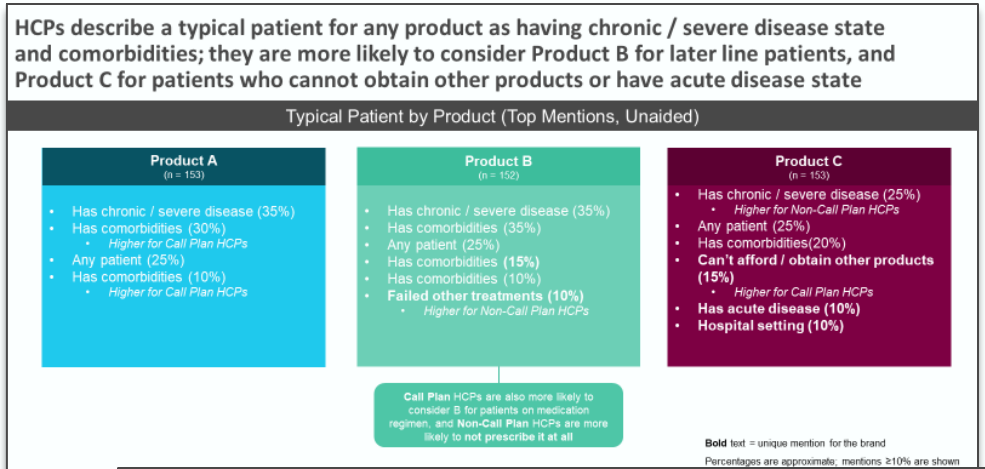
Patient Attribute	Patient A	Patient B	Patient C	Patient D
Potassium Level	5.5 - 5.7 mmol/L	5.8 - 6.0 mmol/L	> 6.0 mmol/L	5.0 - 5.49 mmol/L
Timing of First Hyperkalemia Event	First event within past 2-3 years	Currently experiencing first event	First event within past year	First event >3 years ago
Number of Hyperkalemia Events in Past Year	>3 events in past year	1-2 events in past year	3 events in past year	>3 events in past year
Chronic Kidney Disease (CKD) Stage	Stage 3	Stage 4	Stage 5	NO CKD, or Stage 1-2
Proteinuria	Absent	Present	Absent	Present
Cardiovascular Disease / Heart Failure	None	Has Cardiovascular Disease (NO Heart Failure)	Has Heart Failure	Has Cardiovascular Disease (NO Heart Failure)
Diuretic Treatment	None	On Diuretic, Max dose	On Diuretic, NOT Max dose	On Diuretic, NOT Max dose
RAASi Treatment	None	On RAASi, Max dose	On RAASi, NOT Max dose	None
Diabetes	Has Diabetes	None	None	Has Diabetes
VELTASSA (patiromer)	○	○	○	○
Kayexalate (sodium polystyrene sulfonate)	○	○	○	○
LOKELMA (sodium zirconium cyclosilicate)	○	○	○	○
Other treatment	○	○	○	○
Watch & Wait / No treatment	○	○	○	○

Market Landscape

Current Perceived Patient Type of all Products

We first asked HCPs to unaidedly describe their typical patient types for each of the products

Then HCPs rate across various attributes the severity of symptom each product garners



HCPs describe a typical patient for any product as having chronic / severe disease state and comorbidities; they are more likely to consider Product B for later line patients, and Product C for patients who cannot obtain other products or have acute disease state

Typical Patient by Product (Top Mentions, Unaided)

Product A
(n = 153)

- Has chronic / severe disease (35%)
- Has comorbidities (30%)
  - *Higher for Call Plan HCPs*
- Any patient (25%)
- Has comorbidities (10%)
  - *Higher for Call Plan HCPs*

Product B
(n = 152)

- Has chronic / severe disease (35%)
- Has comorbidities (35%)
- Any patient (25%)
- Has comorbidities **(15%)**
- Has comorbidities (10%)
- **Failed other treatments (10%)**
  - *Higher for Non-Call Plan HCPs*

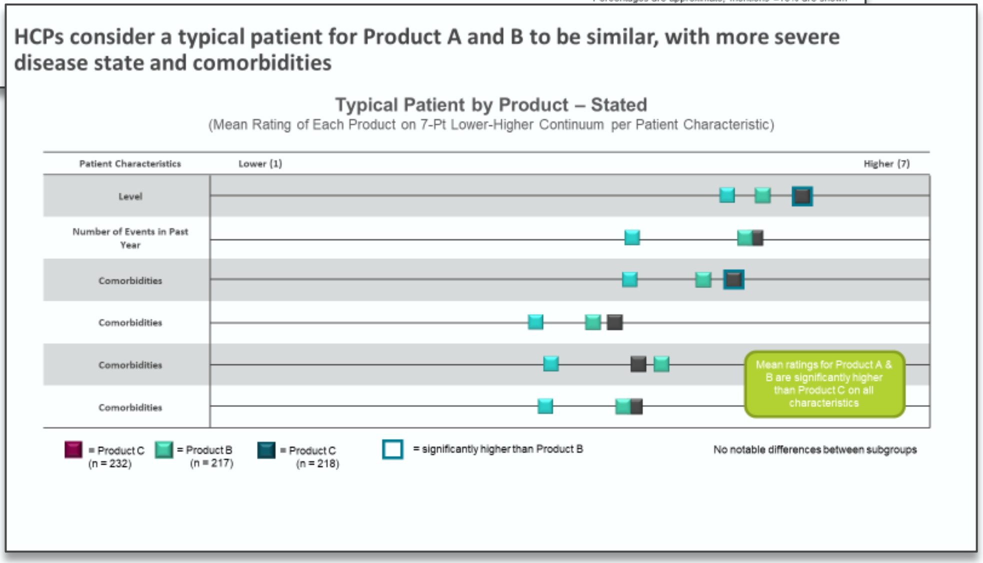
Product C
(n = 153)

- Has chronic / severe disease (25%)
  - *Higher for Non-Call Plan HCPs*
- Any patient (25%)
- Has comorbidities(20%)
- **Can't afford / obtain other products (15%)**
  - *Higher for Call Plan HCPs*
- **Has acute disease (10%)**
- **Hospital setting (10%)**

Call Plan HCPs are also more likely to consider B for patients on medication regimen, and **Non-Call Plan** HCPs are more likely to not prescribe it at all

Bold text = unique mention for the brand

Percentages are approximate; mentions ≥10% are shown



HCPs consider a typical patient for Product A and B to be similar, with more severe disease state and comorbidities

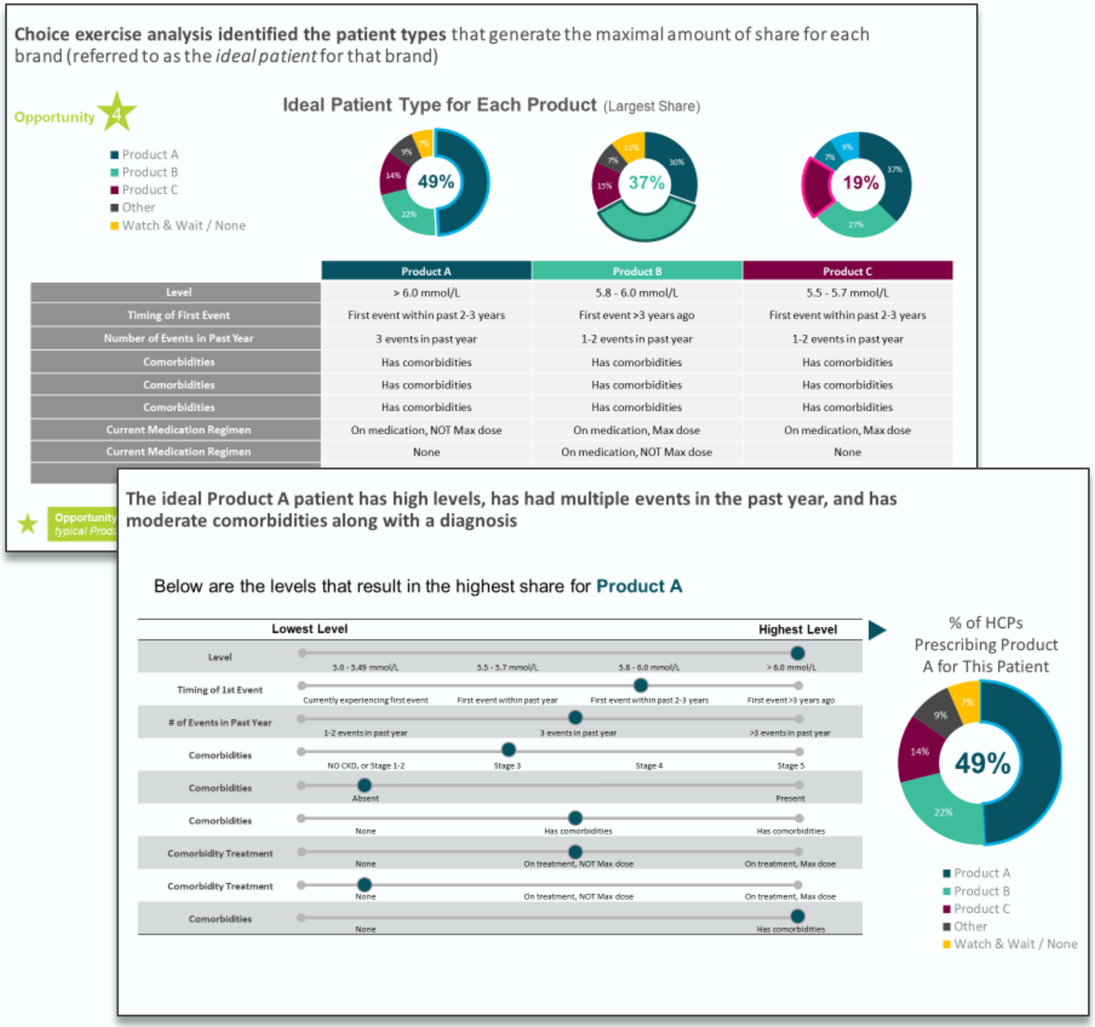
Typical Patient by Product – Stated
(Mean Rating of Each Product on 7-Pt Lower-Higher Continuum per Patient Characteristic)

Situational Choice Exercise

Ideal Patient Types for all products tested

We were able to identify Product A's ideal patient type through our analysis of the situational choice model

Additionally, we found their competitors' (Product B & C) ideal patient types to find where Product A could **steal share**



Choice exercise analysis identified the patient types that generate the maximal amount of share for each brand (referred to as the *ideal patient* for that brand)

Opportunity 4
Ideal Patient Type for Each Product (Largest Share)
■ Product A
■ Product B
■ Product C
■ Other
■ Watch & Wait / None
49%
7%
9%
14%
22%
37%
11%
7%
15%
30%
19%
9%
7%
37%
27%

	Product A	Product B	Product C
Level	> 6.0 mmol/L	5.8 - 6.0 mmol/L	5.5 - 5.7 mmol/L
Timing of First Event	First event within past 2-3 years	First event >3 years ago	First event within past 2-3 years
Number of Events in Past Year	3 events in past year	1-2 events in past year	1-2 events in past year
Comorbidities	Has comorbidities	Has comorbidities	Has comorbidities
Comorbidities	Has comorbidities	Has comorbidities	Has comorbidities
Comorbidities	Has comorbidities	Has comorbidities	Has comorbidities
Current Medication Regimen	On medication, NOT Max dose	On medication, Max dose	On medication, Max dose
Current Medication Regimen	None	On medication, NOT Max dose	None

The ideal Product A patient has high levels, has had multiple events in the past year, and has moderate comorbidities along with a diagnosis

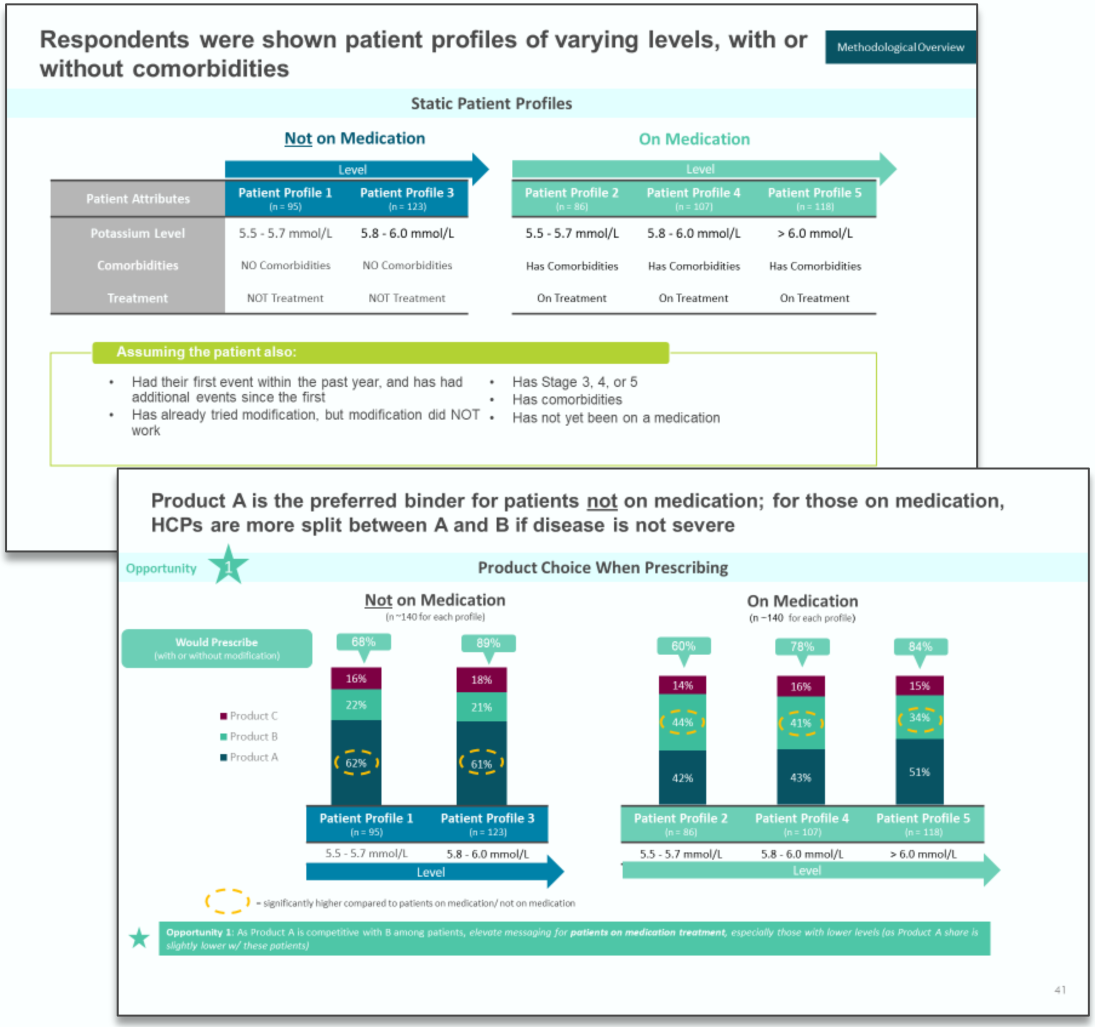
Below are the levels that result in the highest share for **Product A**

Lowest Level
Highest Level
Level
5.0 - 5.49 mmol/L
5.5 - 5.7 mmol/L
5.8 - 6.0 mmol/L
> 6.0 mmol/L
Timing of 1st Event
Currently experiencing first event
First event within past year
First event within past 2-3 years
First event >3 years ago
# of Events in Past Year
1-2 events in past year
3 events in past year
>3 events in past year
Comorbidities
NO CKD, or Stage 1-2
Stage 3
Stage 4
Stage 5
Comorbidities
Absent
Present
Comorbidities
None
Has comorbidities
Has comorbidities
Comorbidity Treatment
None
On treatment, NOT Max dose
On treatment, Max dose
Comorbidity Treatment
None
On treatment, NOT Max dose
On treatment, Max dose
Comorbidities
None
Has comorbidities
% of HCPs Prescribing Product A for This Patient
49%
7%
9%
14%
22%
■ Product A
■ Product B
■ Product C
■ Other
■ Watch & Wait / None

Static Patient Profile Assessment

Customized patient type assessment

Client specific patient types were also evaluated to tease out more findings



Respondents were shown patient profiles of varying levels, with or without comorbidities

Methodological Overview

Static Patient Profiles

	Not on Medication		On Medication		
	Level		Level		
Patient Attributes	Patient Profile 1 (n = 95)	Patient Profile 3 (n = 123)	Patient Profile 2 (n = 86)	Patient Profile 4 (n = 107)	Patient Profile 5 (n = 118)
Potassium Level	5.5 - 5.7 mmol/L	5.8 - 6.0 mmol/L	5.5 - 5.7 mmol/L	5.8 - 6.0 mmol/L	> 6.0 mmol/L
Comorbidities	NO Comorbidities	NO Comorbidities	Has Comorbidities	Has Comorbidities	Has Comorbidities
Treatment	NOT Treatment	NOT Treatment	On Treatment	On Treatment	On Treatment

Assuming the patient also:

- Had their first event within the past year, and has had additional events since the first
- Has already tried modification, but modification did NOT work
- Has Stage 3, 4, or 5
- Has comorbidities
- Has not yet been on a medication

Product A is the preferred binder for patients not on medication; for those on medication, HCPs are more split between A and B if disease is not severe

Opportunity 1

Product Choice When Prescribing

Not on Medication
(n ~140 for each profile)
On Medication
(n ~140 for each profile)
Would Prescribe
(with or without modification)
Product C
Product B
Product A
68%
16%
22%
62%
89%
18%
21%
61%
60%
14%
44%
42%
78%
16%
41%
43%
84%
15%
34%
51%
Patient Profile 1
(n = 95)
Patient Profile 3
(n = 123)
Patient Profile 2
(n = 86)
Patient Profile 4
(n = 107)
Patient Profile 5
(n = 118)
5.5 - 5.7 mmol/L
5.8 - 6.0 mmol/L
5.5 - 5.7 mmol/L
5.8 - 6.0 mmol/L
> 6.0 mmol/L
Level
Level

= significantly higher compared to patients on medication/ not on medication

Opportunity 1: As Product A is competitive with B among patients, *elevate messaging for **patients on medication treatment**, especially those with lower levels (as Product A share is slightly lower w/ these patients)*

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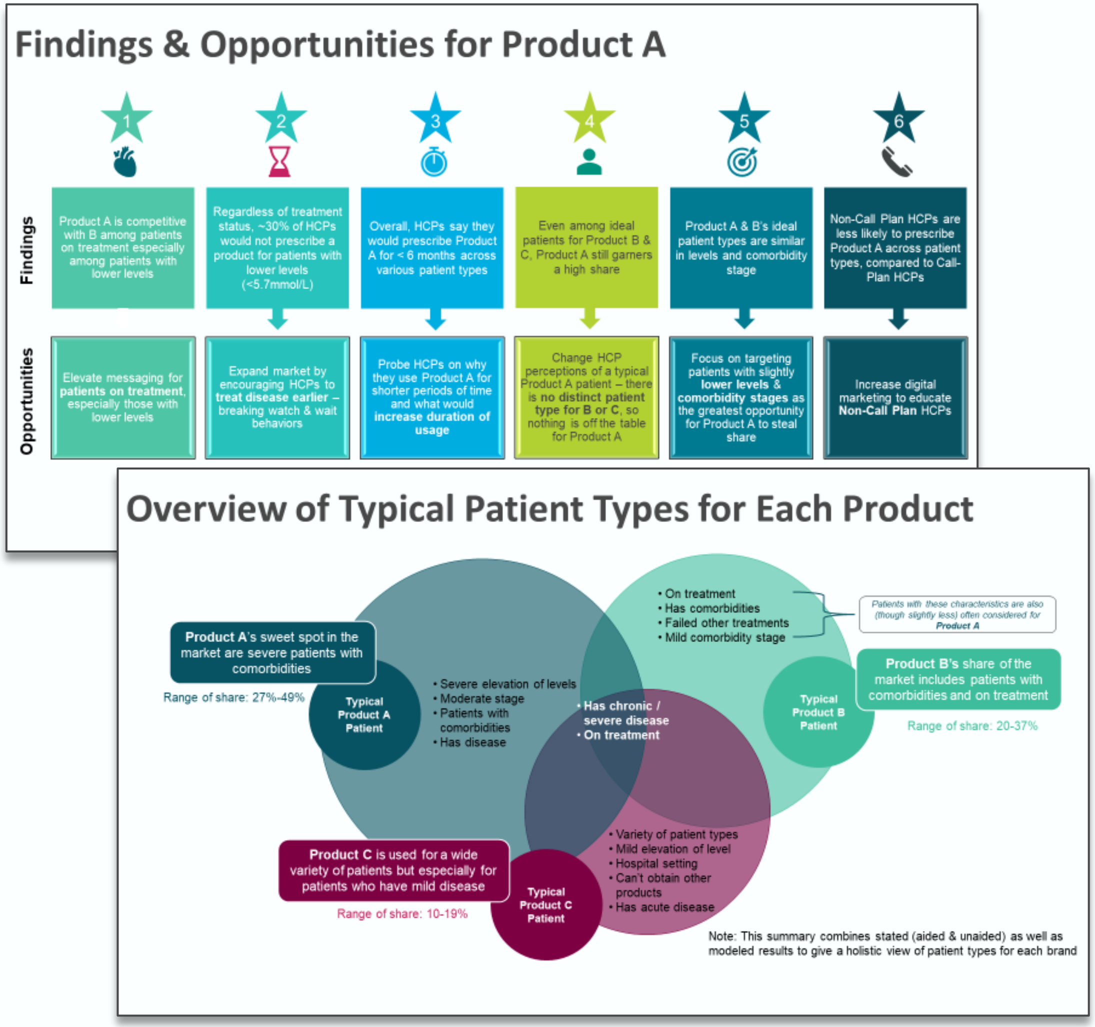
buzzback

Actionable Insights

- Identified opportunity areas/patient types to help steal share from competitors
- Provided insight into which specific patient types can help to grow the overall share of the market
- Identified specific tactics to use for non-call plan HCPs who don't benefit from personal promotion efforts



Findings & Opportunities for Product A

	1	2	3	4	5	6
Findings	Product A is competitive with B among patients on treatment especially among patients with lower levels	Regardless of treatment status, ~30% of HCPs would not prescribe a product for patients with lower levels (<5.7mmol/L)	Overall, HCPs say they would prescribe Product A for < 6 months across various patient types	Even among ideal patients for Product B & C, Product A still garners a high share	Product A & B's ideal patient types are similar in levels and comorbidity stage	Non-Call Plan HCPs are less likely to prescribe Product A across patient types, compared to Call-Plan HCPs
Opportunities	Elevate messaging for **patients on treatment**, especially those with lower levels	Expand market by encouraging HCPs to **treat disease earlier** – breaking watch & wait behaviors	Probe HCPs on why they use Product A for shorter periods of time and what would **increase duration of usage**	Change HCP perceptions of a typical Product A patient – there is **no distinct patient type for B or C**, so nothing is off the table for Product A	Focus on targeting patients with slightly **lower levels & comorbidity stages** as the greatest opportunity for Product A to steal share	Increase digital marketing to educate **Non-Call Plan** HCPs

Overview of Typical Patient Types for Each Product

Product A's sweet spot in the market are severe patients with comorbidities

Range of share: 27%-49%

- Severe elevation of levels
- Moderate stage
- Patients with comorbidities
- Has disease

- **Has chronic / severe disease**
- **On treatment**

- On treatment
- Has comorbidities
- Failed other treatments
- Mild comorbidity stage

Patients with these characteristics are also (though slightly less) often considered for ***Product A***

Product B's share of the market includes patients with comorbidities and on treatment

Range of share: 20-37%

Product C is used for a wide variety of patients but especially for patients who have mild disease

Range of share: 10-19%

- Variety of patient types
- Mild elevation of level
- Hospital setting
- Can't obtain other products
- Has acute disease

Note: This summary combines stated (aided & unaided) as well as modeled results to give a holistic view of patient types for each brand

Questions?

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