



Drug data trends and healthcare transformations

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Terminology and background

Certificate: The employee and the linked dependants.

Insured: Any covered individuals (i.e. employee, spouse or child).

Utilization: The number of eligible claims per certificate.

Eligible amount : The cost of the drugs considered eligible by TELUS Health. This measure does not take into account any cost sharing (i.e. deductible, co-insurance, and maximums).

Trend : The presented trend is the historical trend.

Note: All insureds of age 64 or less are considered.

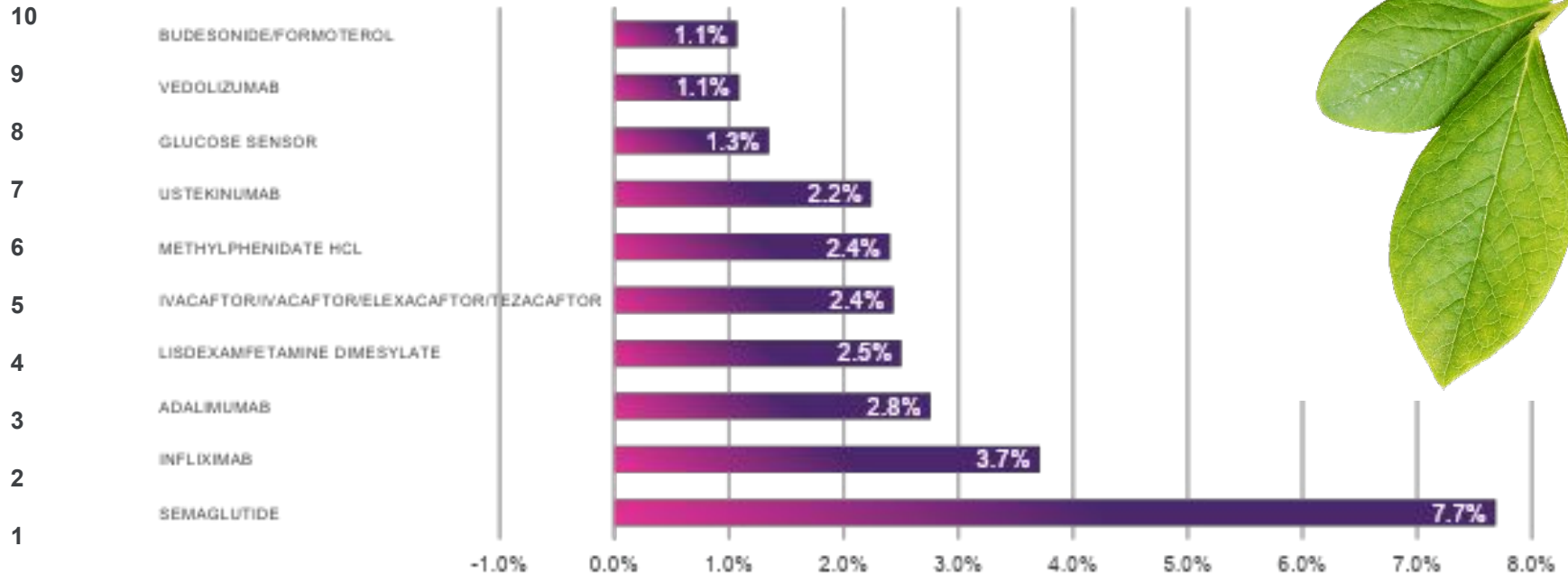




Top 10 Analyses

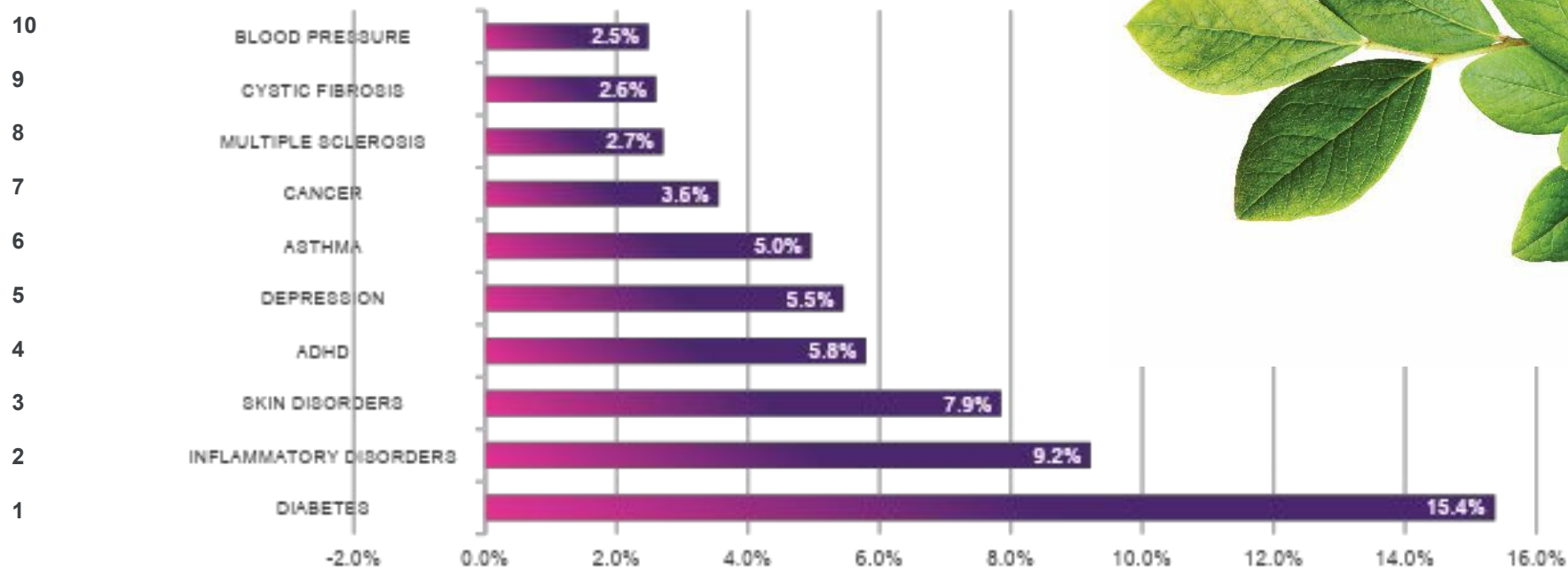
Top 10 drug molecules in 2023

Top 10 molecules by eligible amount in 2023



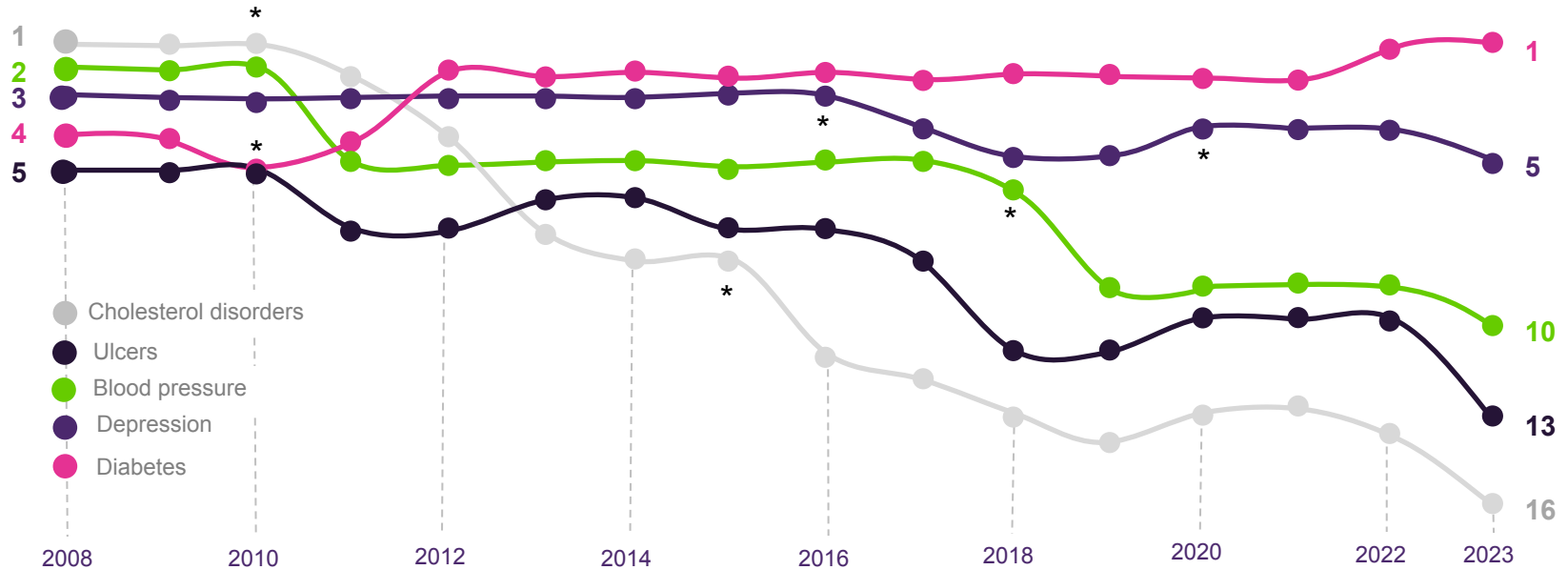
Top 10 therapeutic classes 2023

Top 10 therapeutic classes in 2023 by eligible amount.



Top 5 therapeutic classes in 2008 vs now

Ranking by % eligible amount



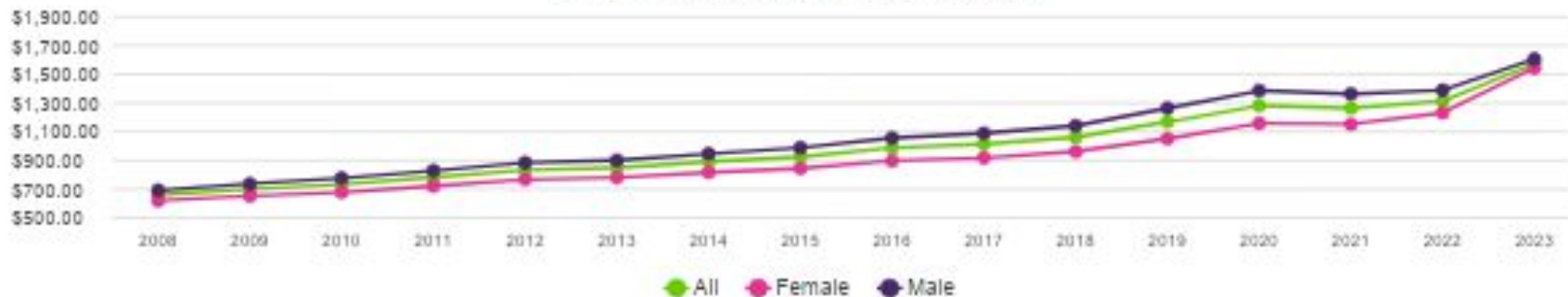
*key market events

Diabetes : A deeper dive

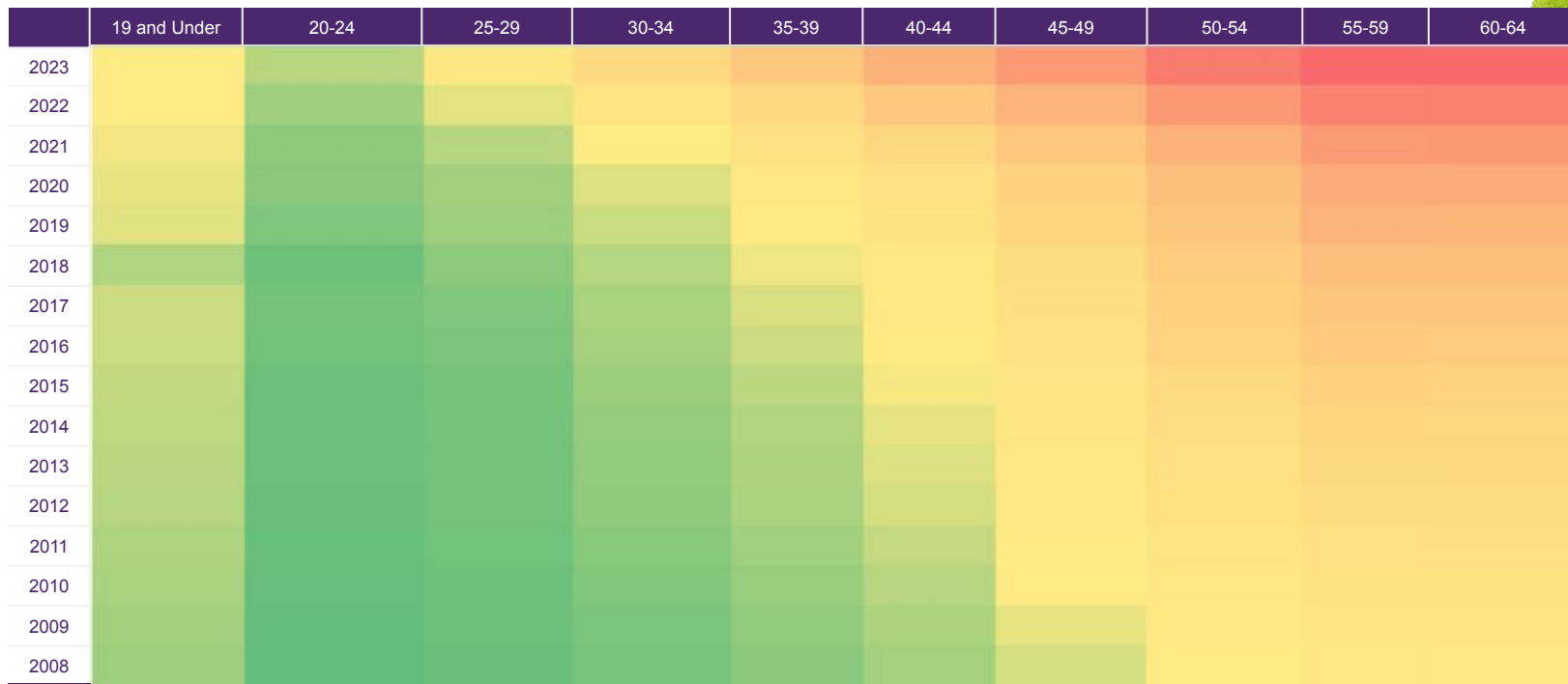
Diabetes Claimants



Cost per claimant for diabetes claimants



Diabetes: Growth in cost by age



Lowest growth Highest growth

Options for cost management in Diabetes

Step therapy

Prior authorization

Diabetes pipeline



**Type 2
diabetes**

Tirzepatide (Mounjaro) - commercialized in early 2024

Cagrilintide + Semaglutide

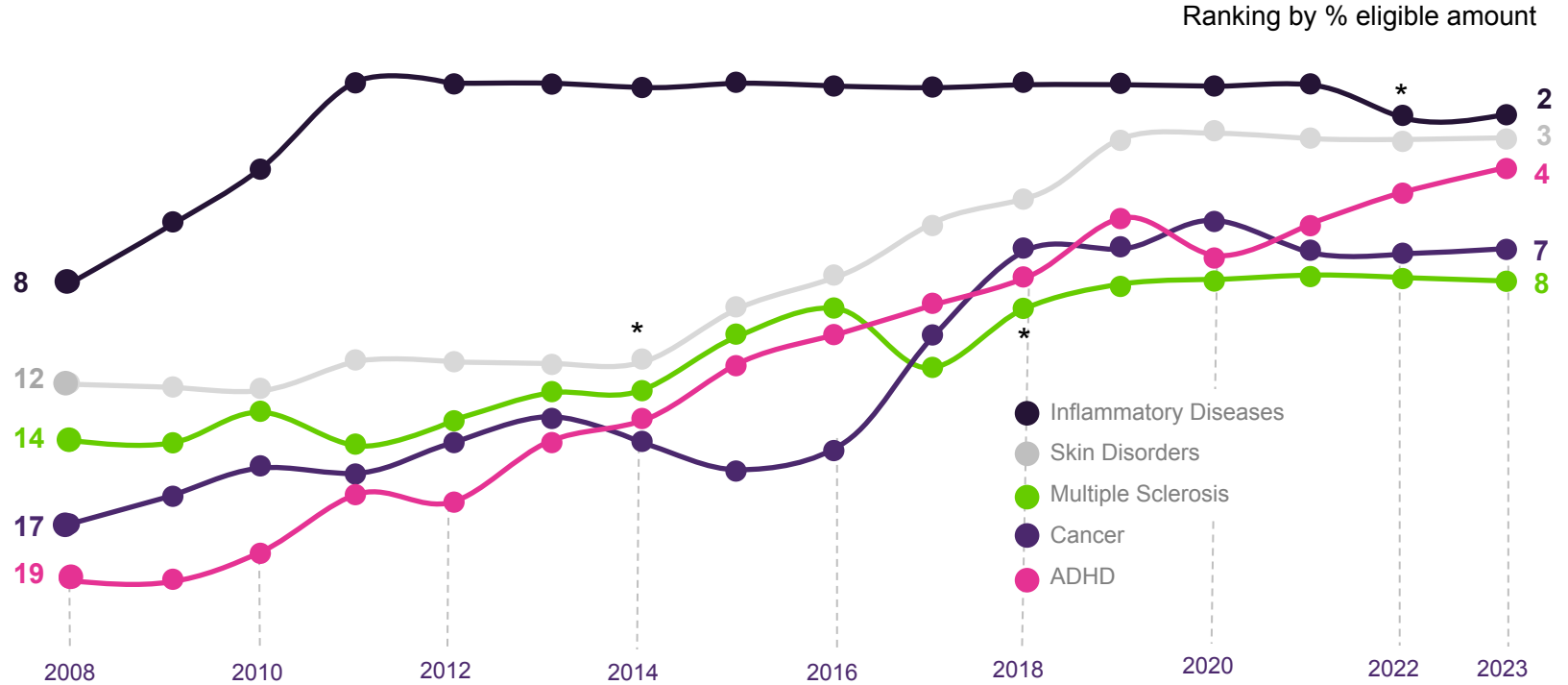
Retatrutide (Novel GIP/GLP-1/Glucagon receptor triagonist)

**Type 1
diabetes**

Insulin icodec (Awiqli) - approved March 2024

Devices : Dexcom 7, Freestyle Libre 3, Eversense E3

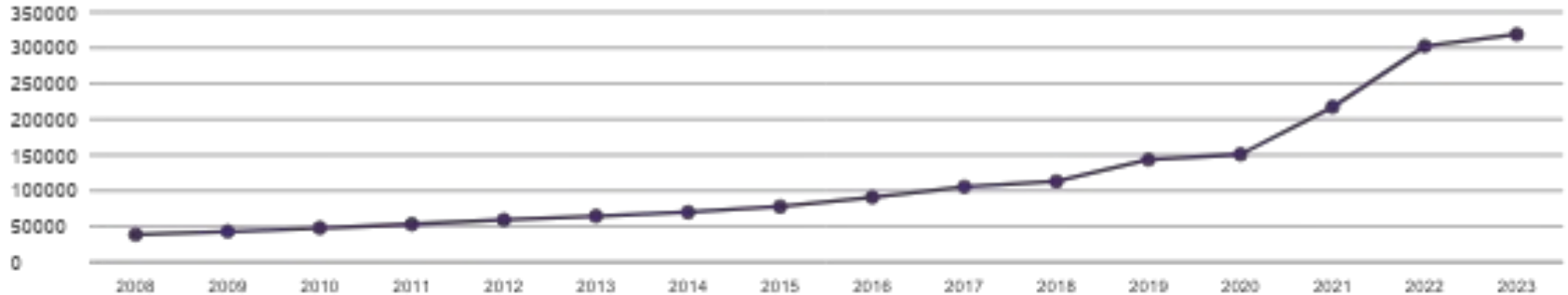
Five fast growing therapeutic classes found in Top 10 in 2023



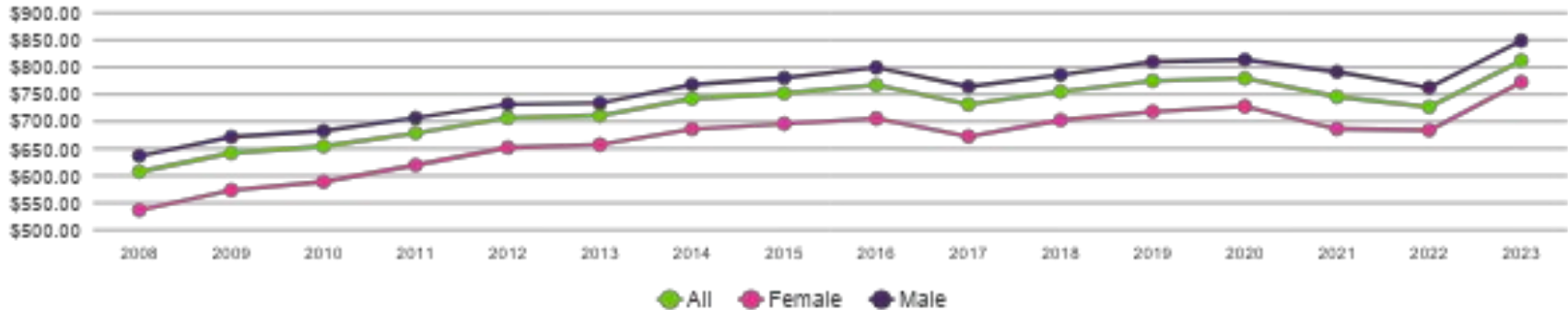
*key market events

ADHD : claimants count and cost

ADHD Claimants



Cost per claimant for ADHD claimants

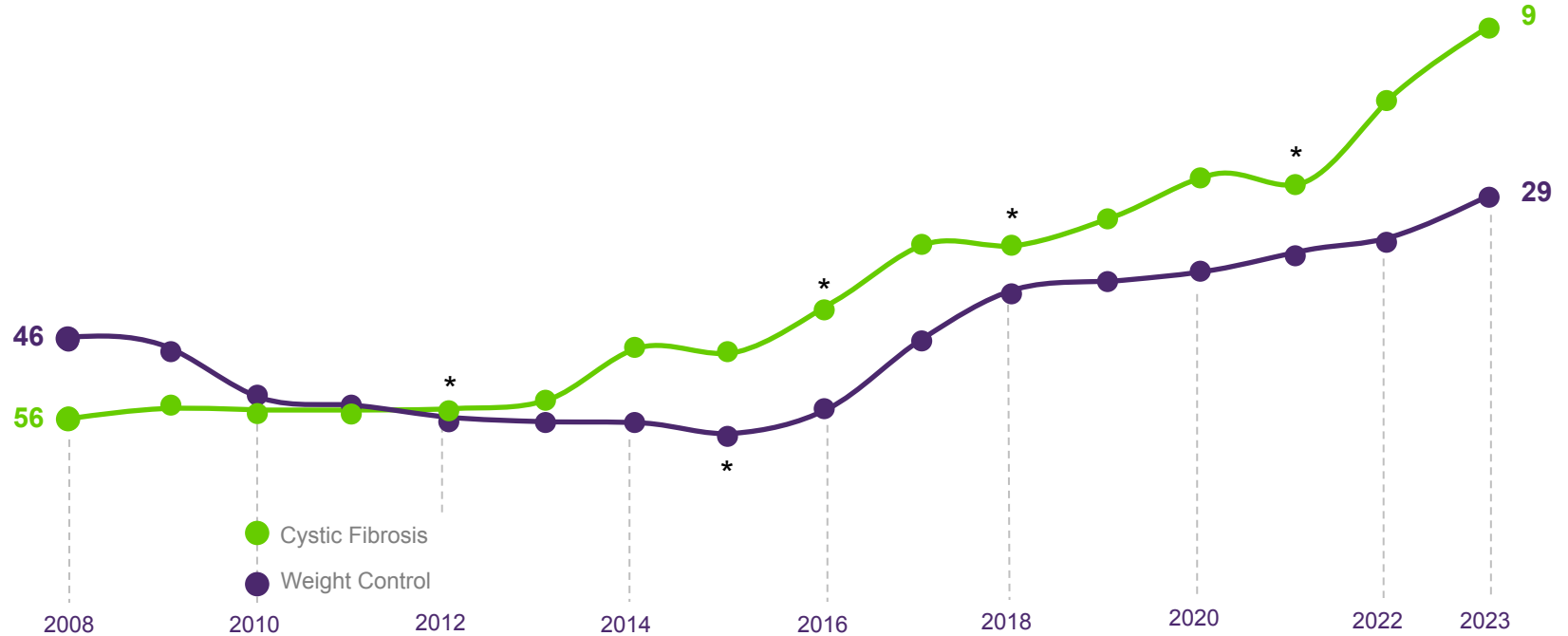


Options for cost management in ADHD

Mandatory generic pricing

Two of the fastest growing therapeutic classes

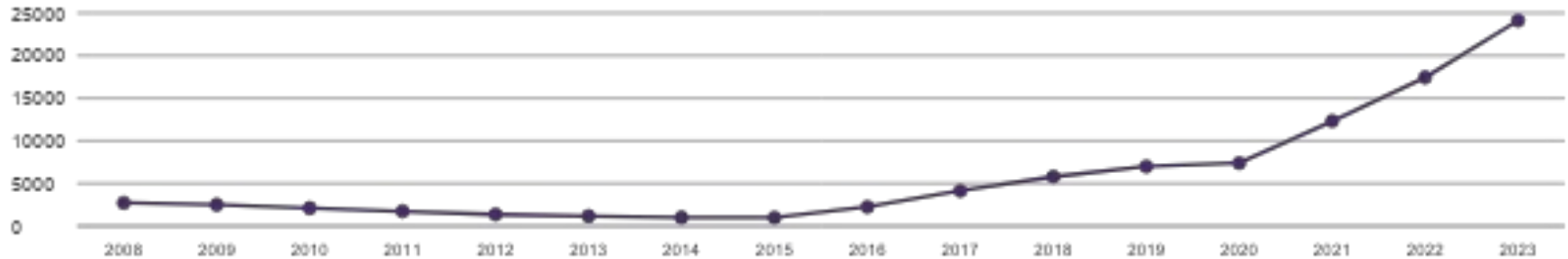
Ranking by % eligible amount



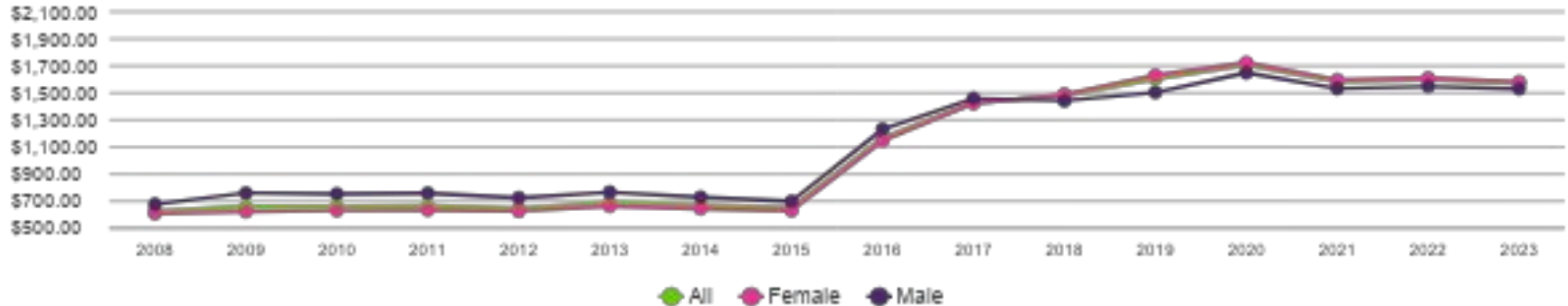
*key market events

Weight control 2008 to 2023

Weight control claimants



Cost per claimant for weight control claimants



Options for cost management in weight control

Prior authorization

Weight control pipeline



Anti-obesity

Tirzepatide – weight control

Cagrilintide + Semaglutide

**Weight
management
associated
with genetic
disorders**

Metreleptin (Myalepta)- Leptin replacement therapy for patients with generalized lipodystrophy

Setmelanotide (Imcivree)- MC4 Receptor agonist

Key takeaways

- The following therapeutic categories have seen a significant drop, falling from the top 5 position in 2008: cholesterol disorders, ulcers, blood pressure
- The following therapeutic categories have remained consistently in the top 10, over the last 15+ years: diabetes, inflammatory disease and depression
- Conversely, the following therapeutic classes have seen significant growth, over the last 15+ years: cystic fibrosis, ADHD, Skin disorders, cancer, multiple sclerosis, and weight control



A woman wearing a purple hijab and glasses is shown in profile, talking on a mobile phone. She is wearing a light pink blazer over a dark top. The background is a blurred indoor setting with windows and a desk with a laptop and a glass of water.

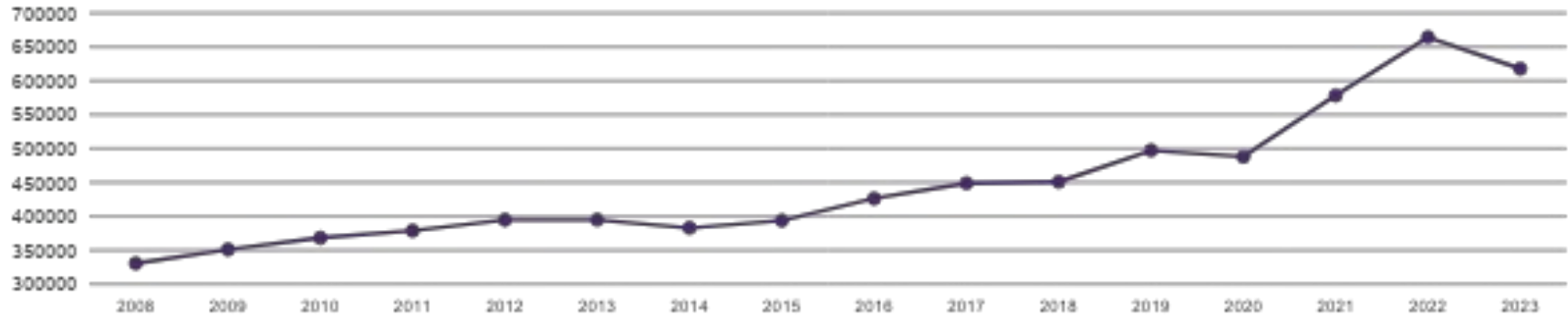
A focus on women's health



Annual **Conference**

Women's health in 2008 to 2023

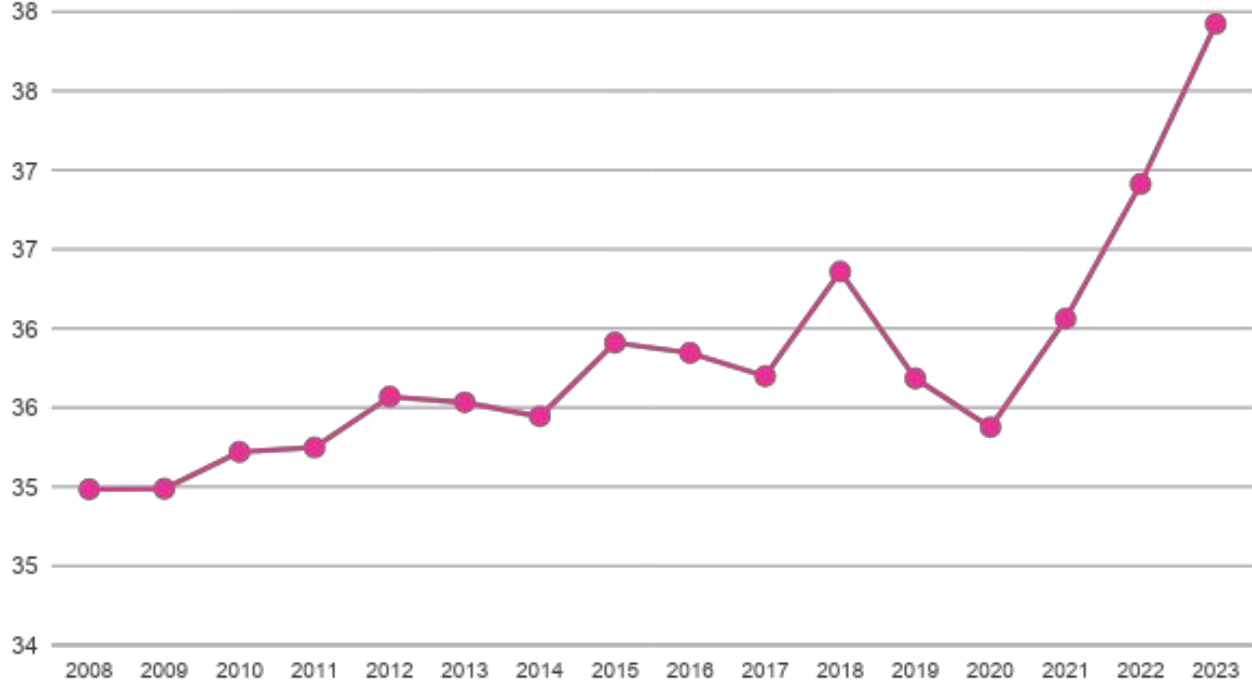
Annual Women's Health Female Claimants



Cost per Female Claimant for Women's Health



Average age for women's health female claimant



Cost per claimant (with age group)



Lowest growth Highest growth

Addressing an underserved market

Endometriosis

- elagolix (Orlissa) - marketed 2018
- estradiol, norethindrone acetate, relugolix (Myfembree) - marketed 2024

Contraception

- drospirenone, estetrol monohydrate (Nextstellis) - marketed 2021
- etonogestrel (Nexplanon) - marketed 2022



Medications in the pipeline



Sildenafil citrate

- Female Hypoactive Sexual Desire Disorder

Fezolinetant

- Menopausal vasomotor symptoms

Zuranolone

- Post partum depression

Future: Developments in digital health



Natural cycles app got recently approved by Health Canada as a form of birth control (class ii medical device license).

FEMTECH Canada : Network initiative fully dedicated to fostering innovation, commercialization and investment in women's health technologies.

NURX App in the US promises the help needed by women to take control of their wellbeing by delivering convenient, reliable and personalized care for their most intimate health needs.

Increase of government initiatives

Cervical cancer prevention

- INESSS recommendation to replace pap test with VPH test
- Extended vaccination for boys for HPV

Contraceptive coverage

- Contraceptive services (BC)
- Pharmacare

National Women's Health Research Initiative: Innovation fund

Biomedical discovery grants will support biomedical research by teams proposing bold and innovative research questions in women's health

Operating grants will be launched to support the following areas of women's health:

- Translational research in healthcare diagnostics, therapeutics and devices
- Healthcare implementation research to remove barriers to access to healthcare



Key takeaways

- Women's health advancements are growing, in a market that was previously under-represented and overlooked
- We continue to see growth in claimant count and cost and see a concentration of growth in the older age groups
- Innovation is not just in the drug space but in technology
- Government initiatives continue to increase to address this market





2023: Key results

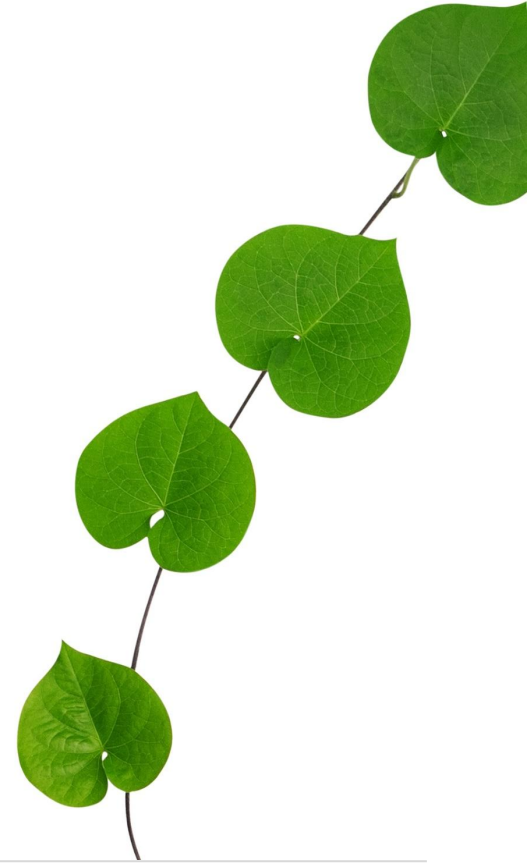
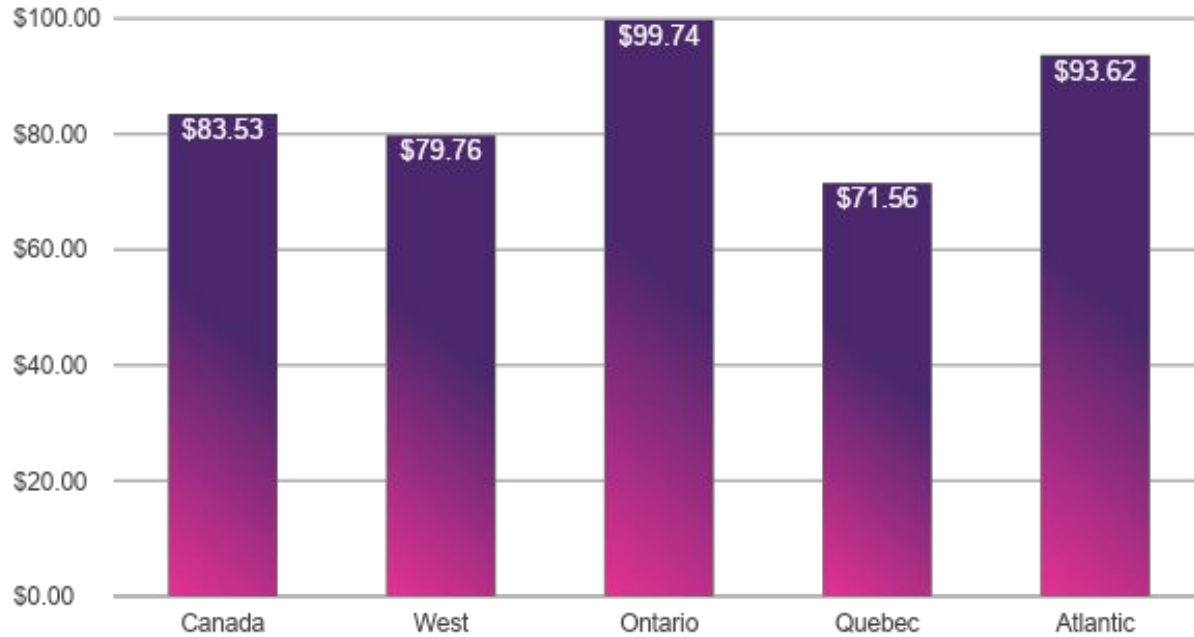
 20TH Annual **Conference**

Average eligible amount per certificate 2023

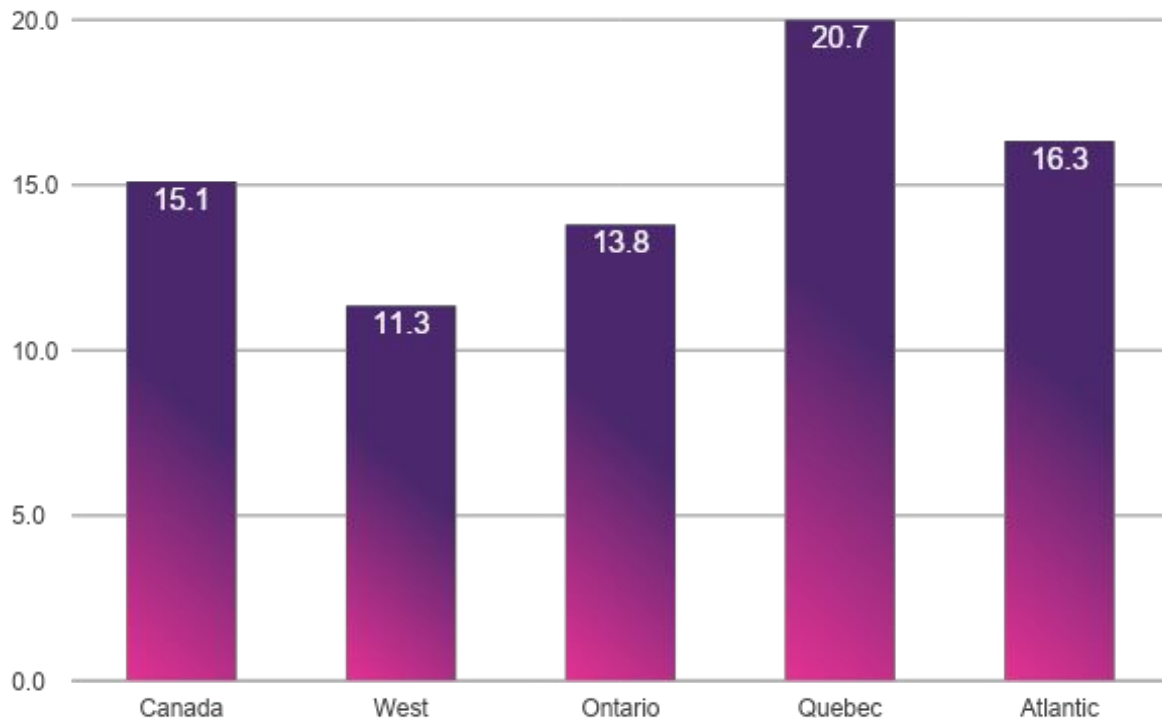
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Average eligible amount per claim 2023



Utilization per certificate 2023



Key results by region 2023

	Canada	West	Ontario	Quebec	Atlantic
Eligible annual amount per certificate.	\$1,262	\$905	\$1,377	\$1,481	\$1,530
Average eligible amount per claim.	\$83.53	\$79.76	\$99.74	\$71.56	\$93.62
Yearly utilization per certificate.	15.1	11.3	13.8	20.7	16.3



A woman with dark hair pulled back, wearing a tan jacket, is standing in a pharmacy aisle. She is looking down at a small white box of medication she is holding in her hands. The shelves around her are filled with various pharmaceutical products, including boxes and bags. The background is slightly blurred, showing more of the pharmacy environment.

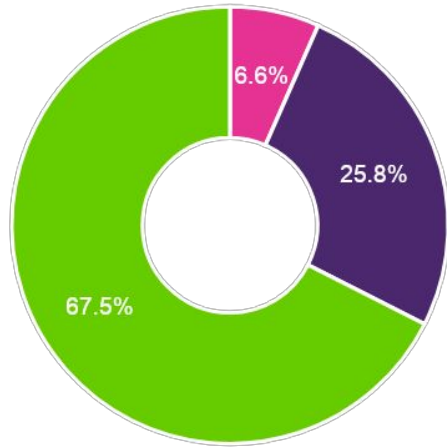
The specialty split



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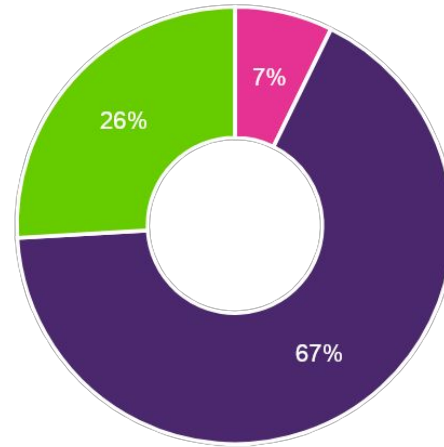
Utilization percentage per drug type

% claims by drug type



■ Brand ■ Single Source ■ Generic

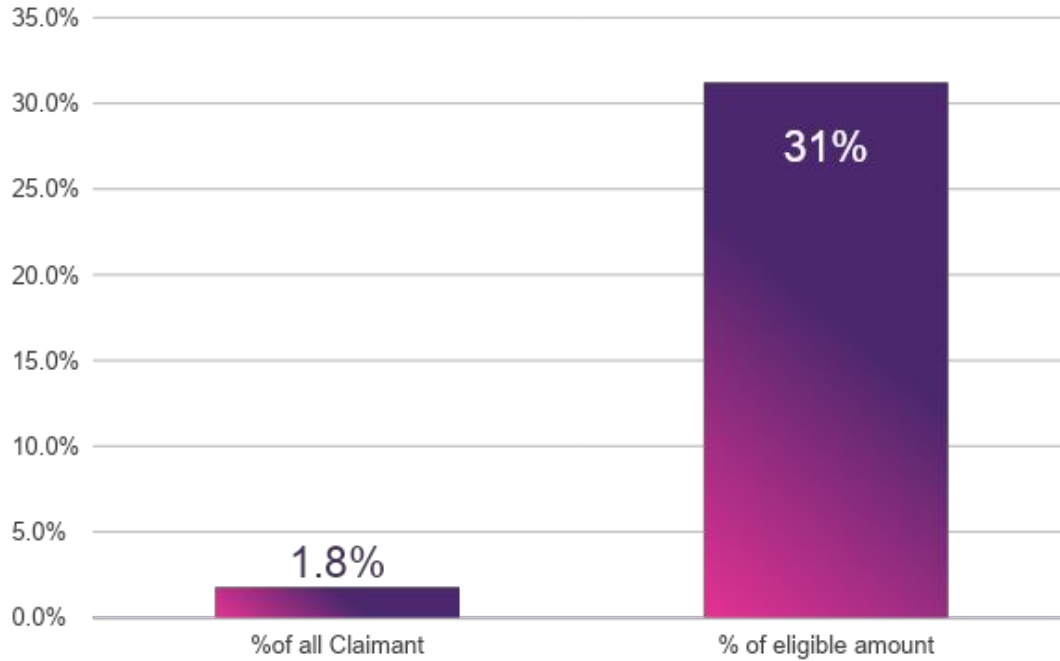
% eligible amount by drug type



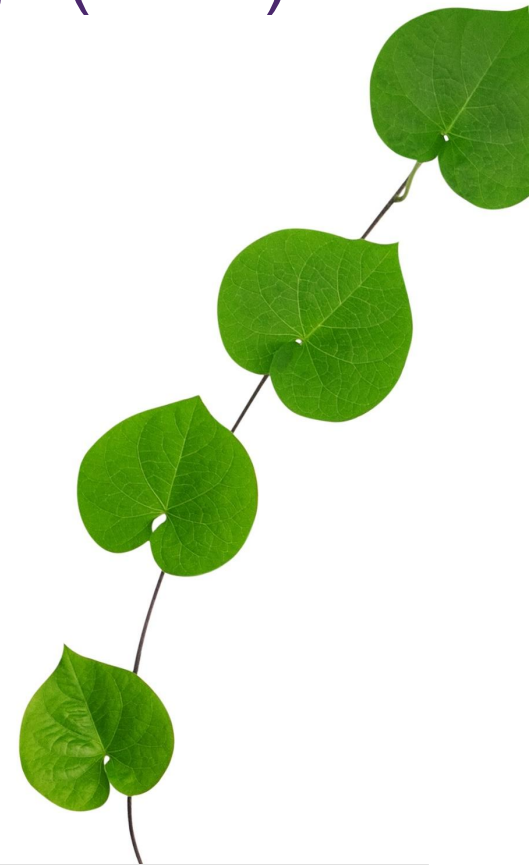
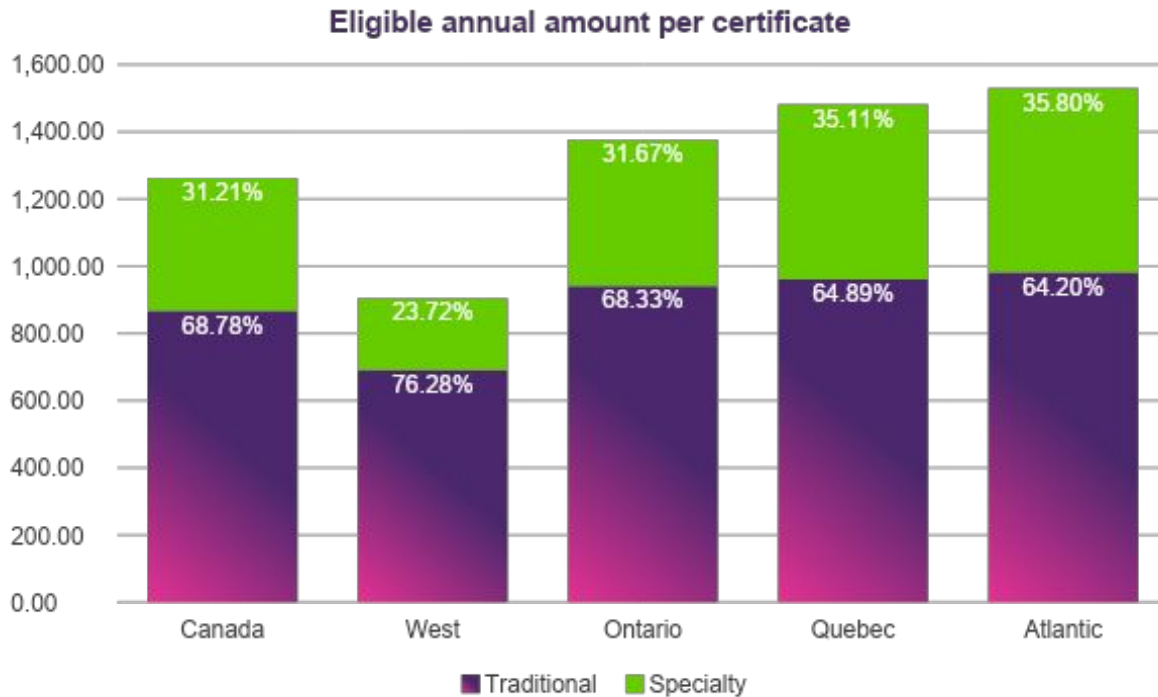
■ Brand ■ Single Source ■ Generic



2023 specialty split



Specialty drugs versus traditional drugs (2023)



Options for cost management in Specialty space

Prior authorization

Biosimilar switch

TELUS Health Specialty drug program

Key takeaways

- Consistent with previous years, a very small proportion of claimants are responsible for a third of the overall spend
- The split between traditional and specialty are consistent across the country, except in the west, likely driven by Pharmacare programs





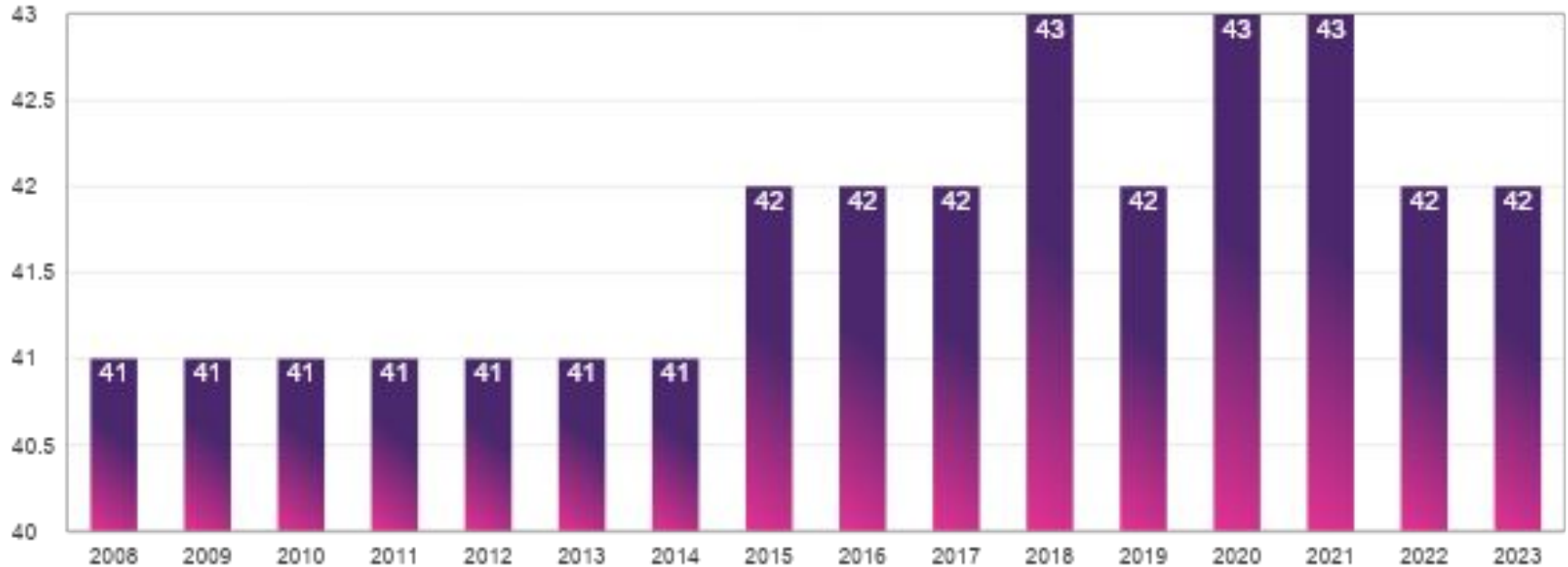
The aging population



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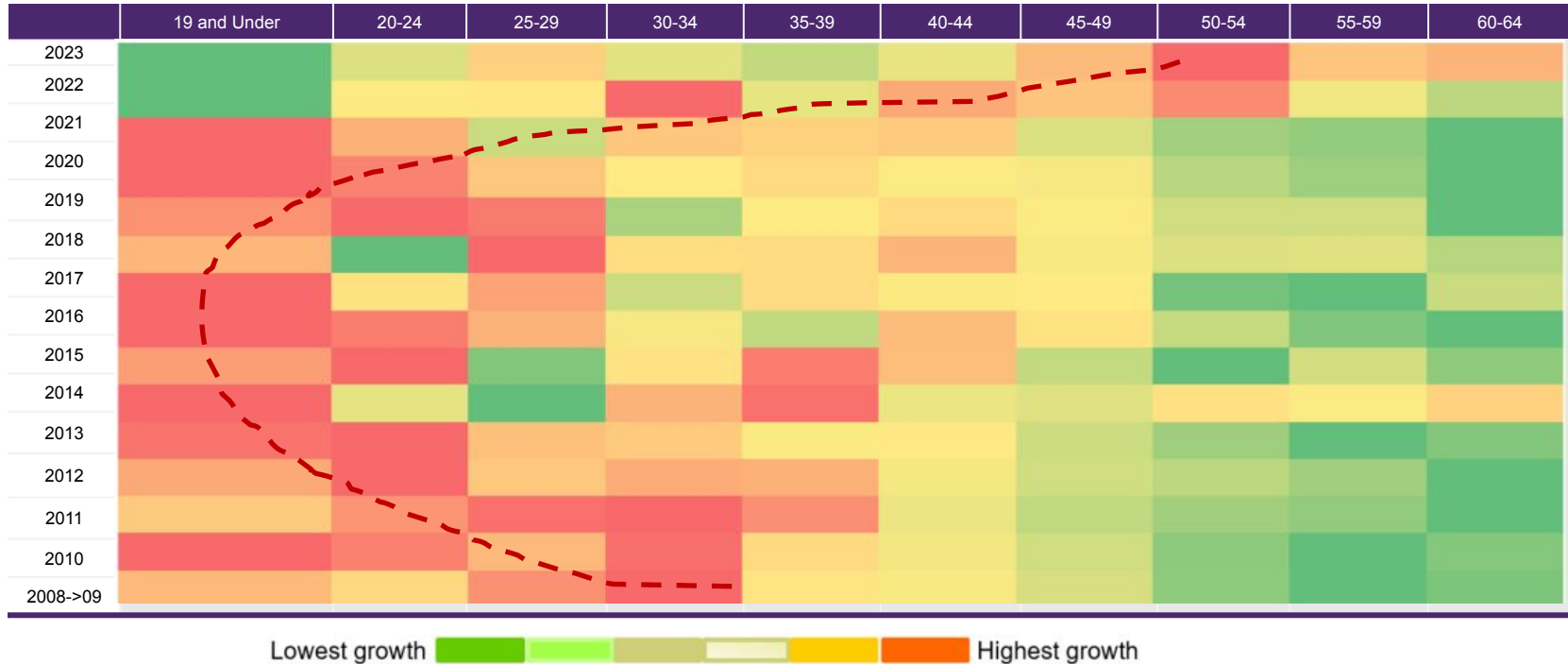
The aging population hypothesis

Average age of insured



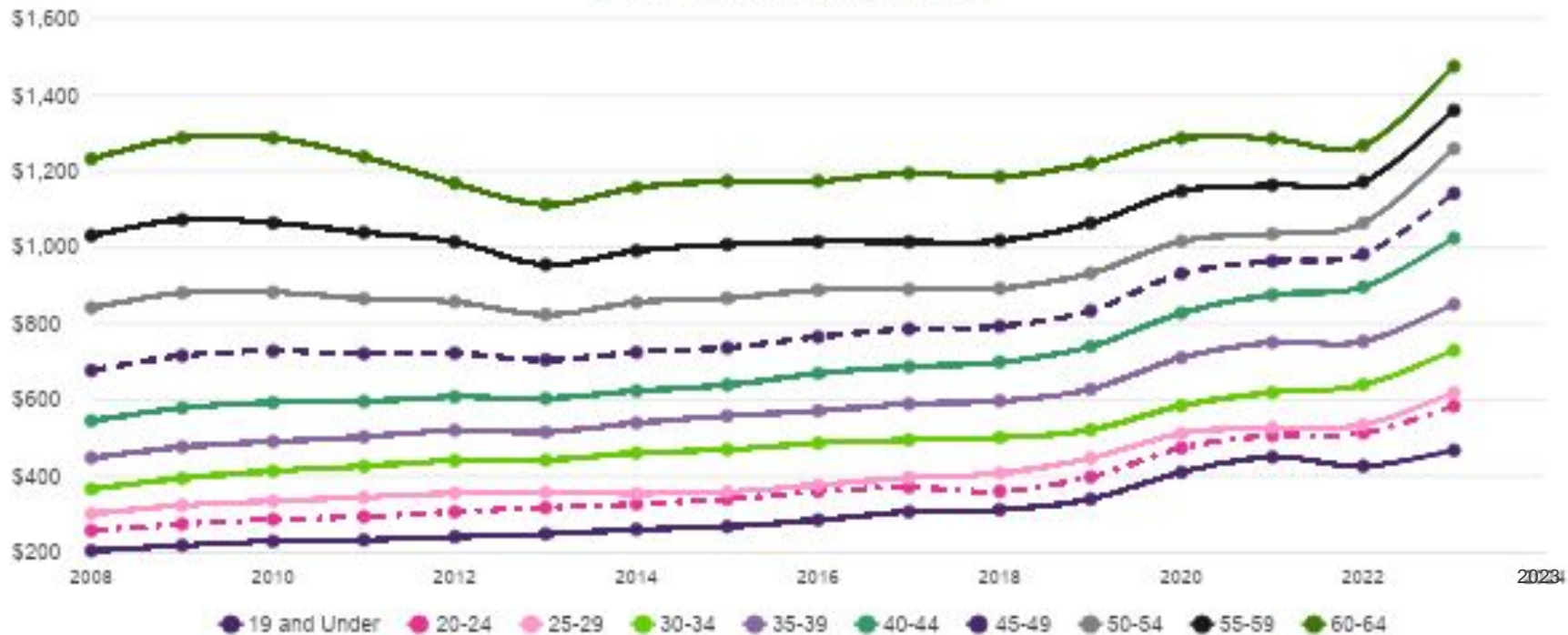
Growth of cost per claimant by age group

Year-to-year growth rate



Growth of cost per claimant by age group

Cost per claimant by age group



Key takeaways

- Average age of the covered population remains stable with a small increase to 42 years of age in 2023
- However, we are seeing higher growth in the average cost per claimant in the older population in recent years
- Average cost per claimant increases with age and is steadily increasing across all age bands for the last 15 years





Final thoughts

- Key changes over the last 15 years of therapeutic classes
- Interesting developments in Women's health
- Re-baselining for the trending data with 2023 results
- Re-baseline the specialty space
- Examination of the aging population



Thank you