



Unlocking insights:

Navigating drug benefit utilization and emerging trends in women's health

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1. No conflict of interest, financial or otherwise, related to the topic and content of this presentation
2. No prior engagement with Pharma

Agenda

1. Contrast of trend in women and men
2. Conditions that affect women
3. Deep dive on migraine
4. Mental health in women
5. Focus on menopause
6. Drug pipeline

UNLOCKING INSIGHTS: CONTRAST OF TREND IN WOMEN AND MEN

Women in workforce

50.7%
of Canadian population

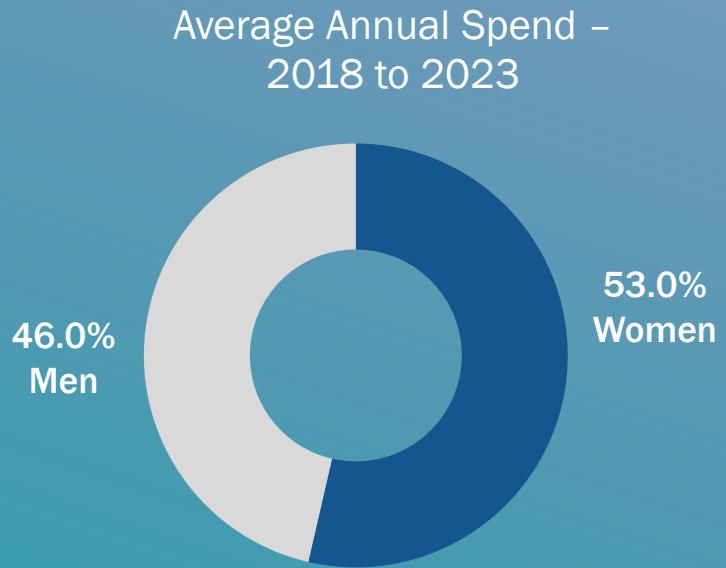
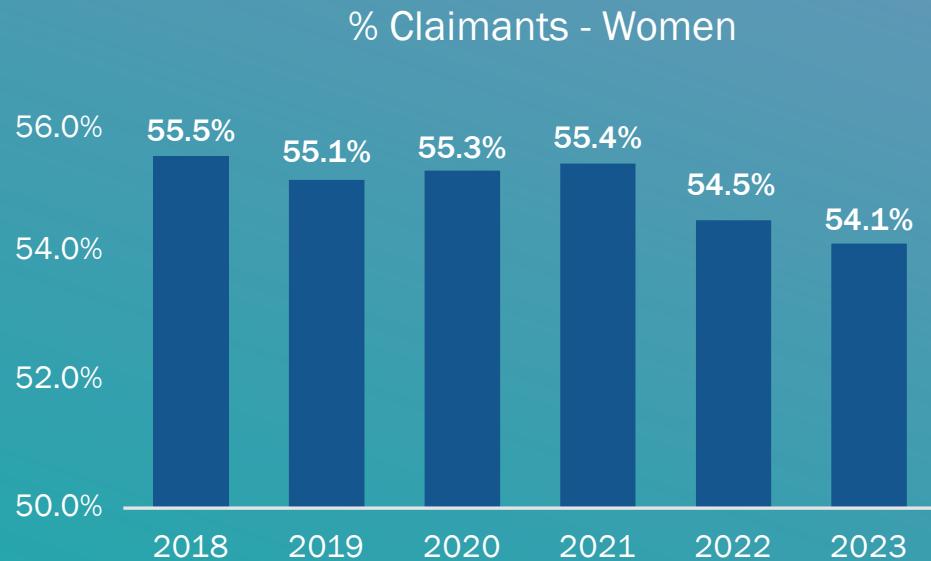
9.6 million
women employed in Canada in
September 2023



Conditions
that affect
disproportionally
half of your
workforce!

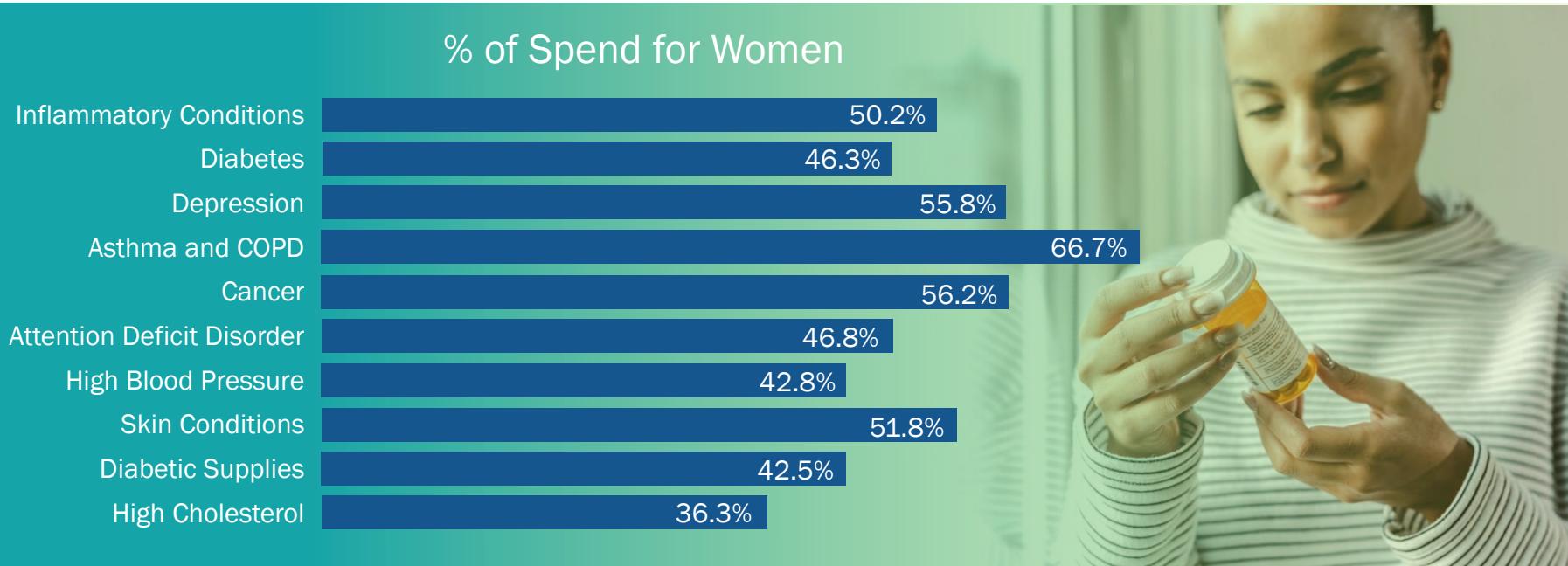
UNLOCKING INSIGHTS: CONTRAST OF TREND IN WOMEN AND MEN

More claimants are women



UNLOCKING INSIGHTS: CONDITIONS THAT AFFECT WOMEN

Many conditions affect women disproportionately



UNLOCKING INSIGHTS: CONDITIONS THAT AFFECT WOMEN

Many conditions affect women disproportionately

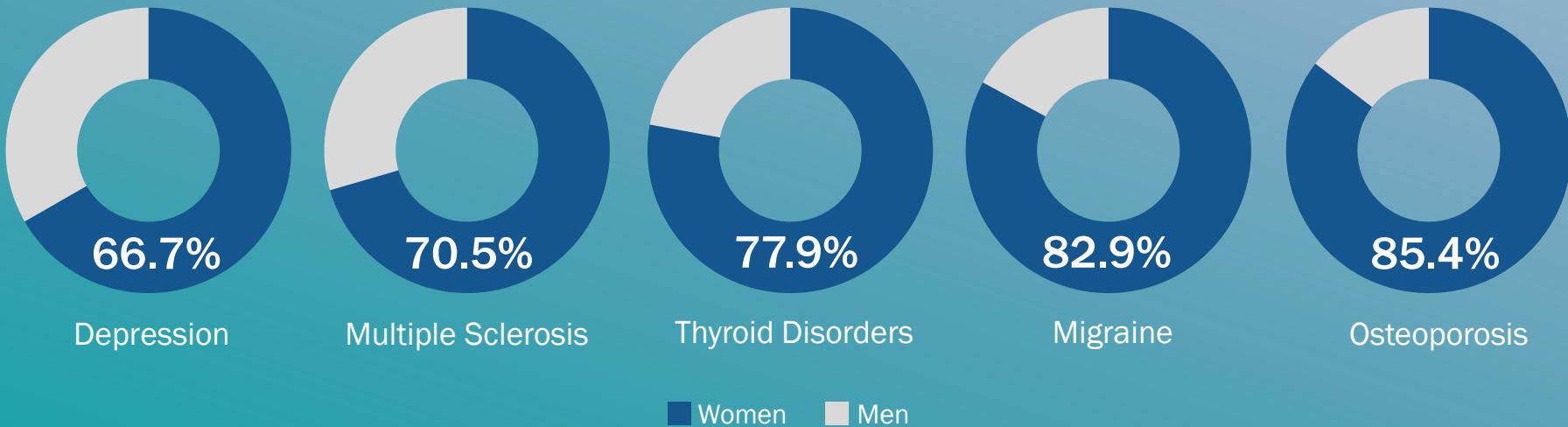
WOMEN			
	2021	2022	2023
1	Inflammatory Conditions	Inflammatory Conditions	Inflammatory Conditions
2	Diabetes	Diabetes	Diabetes
3	Depression	Depression	Depression
4	Asthma/COPD	Asthma/COPD	Asthma/COPD
5	Cancer	Cancer	Cancer
6	Multiple Sclerosis	Multiple Sclerosis	Attention Deficit Disorder
7	High Blood Pressure	High Blood Pressure	Skin Conditions
8	Birth Control	Attention Deficit Disorder	High Blood Pressure
9	Skin Conditions	Skin Conditions	Multiple Sclerosis
10	Ulcer/Reflux	Ulcer/Reflux	Allergy

MEN			
	2021	2022	2023
1	Inflammatory Conditions	Diabetes	Diabetes
2	Diabetes	Inflammatory Conditions	Inflammatory Conditions
3	High Blood Pressure	High Blood Pressure	High Blood Pressure
4	Cancer	Asthma/COPD	Attention Deficit Disorder
5	Attention Deficit Disorder	Attention Deficit Disorder	Asthma/COPD
6	Asthma/COPD	Cancer	Cancer
7	High Cholesterol	Cardiovascular Disease	High Cholesterol
8	Cardiovascular Disease	High Cholesterol	Skin Conditions
9	Depression	Depression	Diabetic Supplies
10	Skin Conditions	Skin Conditions	Depression

UNLOCKING INSIGHTS: CONDITIONS THAT AFFECT WOMEN

Many conditions affect women disproportionately

Proportion of Spend



UNLOCKING INSIGHTS: CONDITIONS THAT AFFECT WOMEN

Women's needs vary with age

0-17

Childhood & Teenage

Attention Deficit Disorder	15.2%
Cystic Fibrosis	11.3%
Infections	8.0%
Asthma/COPD	6.0%

14%
of women

5%
of spend

18-24

Early Adulthood

Attention Deficit Disorder	13.1%
Inflammatory Conditions	12.3%
Birth Control	12.2%
Depression	9.1%

8%
of women

5%
of spend

25-44

Family & Career Building

Inflammatory Conditions	13.7%
Depression	6.8%
Multiple Sclerosis	4.9%
Infertility	4.6%

32%
of women

26%
of spend

45-64

Late Adulthood

Diabetes	13.2%
Cancer	6.4%
Asthma/COPD	5.3%
Hormone Replacement	3.3%

34%
of women

46%
of spend

Migraines more prevalent in women

Over 5 million Canadians

- 2-3 times more prevalent in women

Economic burden ranging from

\$15,651 to \$25,688 per patient per year

- Missed workdays, disability payments, reduced productivity

Preventative vs. Acute treatments

- Triptans (80% of claims volume); CGRPs; Gepants



The right treatment, to the right patient at the right time

Depression more prevalent in women

1.7x higher prevalence
of depression in women
compared to men

Top 5 spend
from early adulthood to late adulthood

- Post-partum
- Caregivers



Access to
treatments,
but not
enough!

Menopause affects the workforce



3 out of 4

women experience menopausal symptoms
that interfere with their daily lives

About a quarter

of women experience severe symptoms

10% will stop working

due to unmanaged symptoms

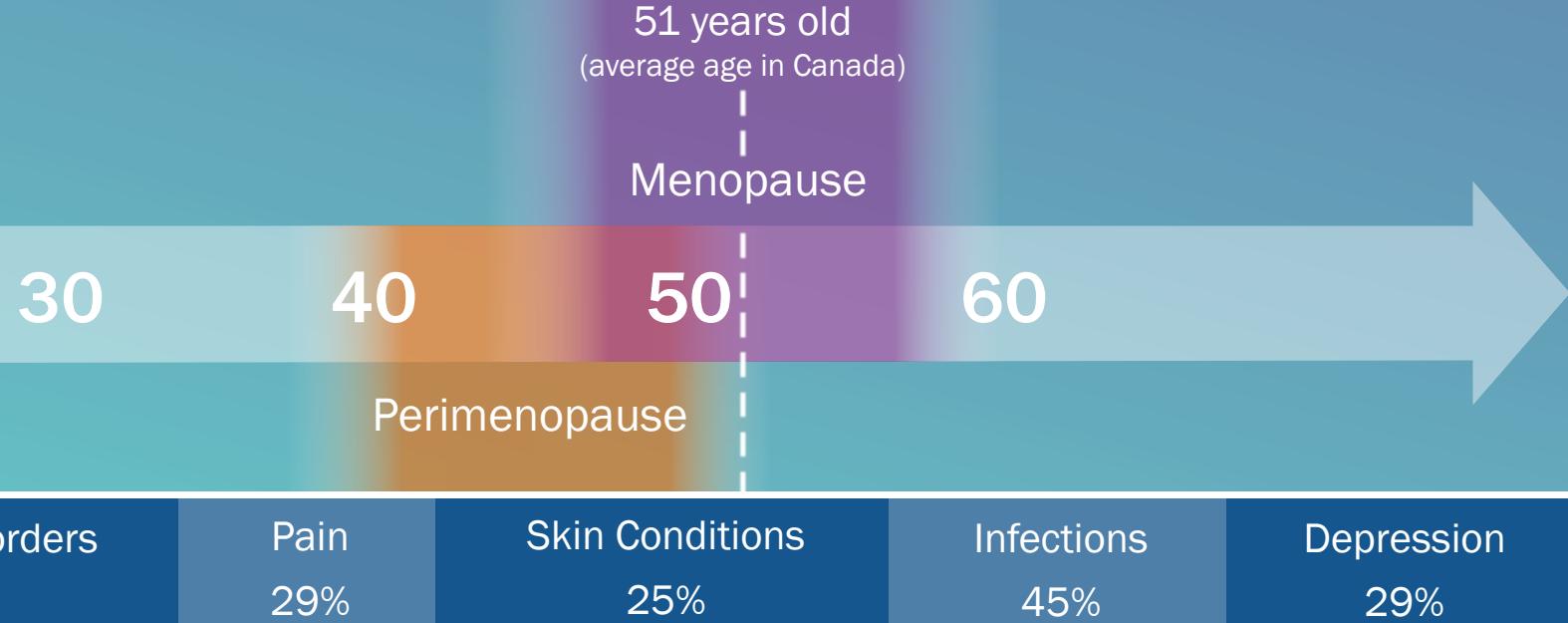


9.7 million
women
in the workforce

Over 5 million
women
over the age of 40

2 million
women
between 45 and 55
years old

The affects of menopause over time

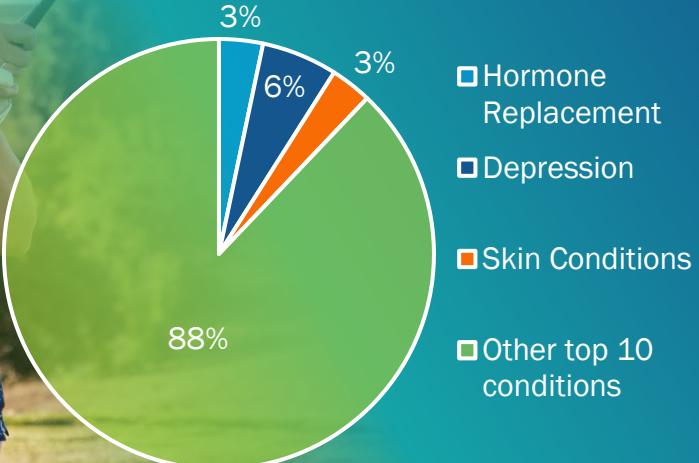


The cost of menopause

- Hormone Replacement Therapy
 - 8th rank in spend
 - 3% of total spend for age bracket
- Low-cost treatments vs newer alternatives



Proportion of Spend for Women in Late Adulthood (45-64 years old)



Drugs coming to market, targeting women's health

Menopause	Fezolinetant	Under Health Canada review	Relief of vasomotor symptoms in menopause, could have positive effects on mood/insomnia; non-hormonal alternative
	Elinzanetant	Under FDA review; not yet submitted to Health Canada	Relief of vasomotor symptoms; non-hormonal alternative
	Estetrol	Under FDA review; not yet submitted to Health Canada	Relief of vasomotor symptoms; hormonal therapy but evidence suggest improved benefits and safety over existing estrogen therapies

Drugs coming to market, targeting women's health

**Endometriosis-
associated pain
and Fibroids**

Linzagolix

Phase III
clinical trial

Potential use as a monotherapy
can eliminate hormonal-therapy
supplementation

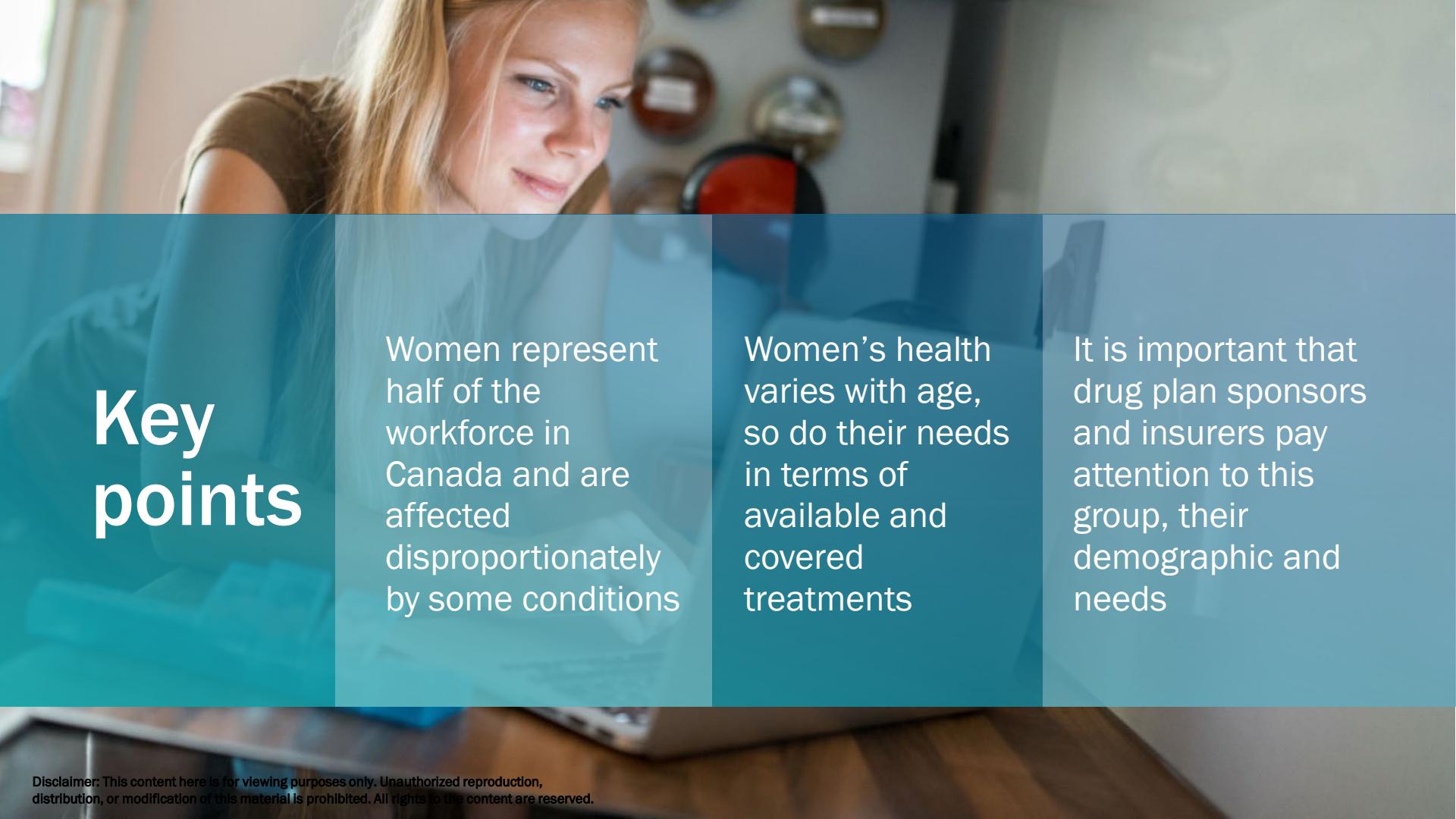
**Post-partum
Depression**

Brexanolone

Phase III
clinical trial

GABA modulator; oral form

Key points

A photograph of a woman with blonde hair, wearing a brown t-shirt, looking down at a smartphone she is holding in her hands. She is sitting at a table with a dark wooden surface. In the background, there are several circular objects, possibly medicine bottles or coins, on a shelf. The lighting is soft and focused on her face and the phone.

Women represent half of the workforce in Canada and are affected disproportionately by some conditions

Women's health varies with age, so do their needs in terms of available and covered treatments

It is important that drug plan sponsors and insurers pay attention to this group, their demographic and needs

Questions?