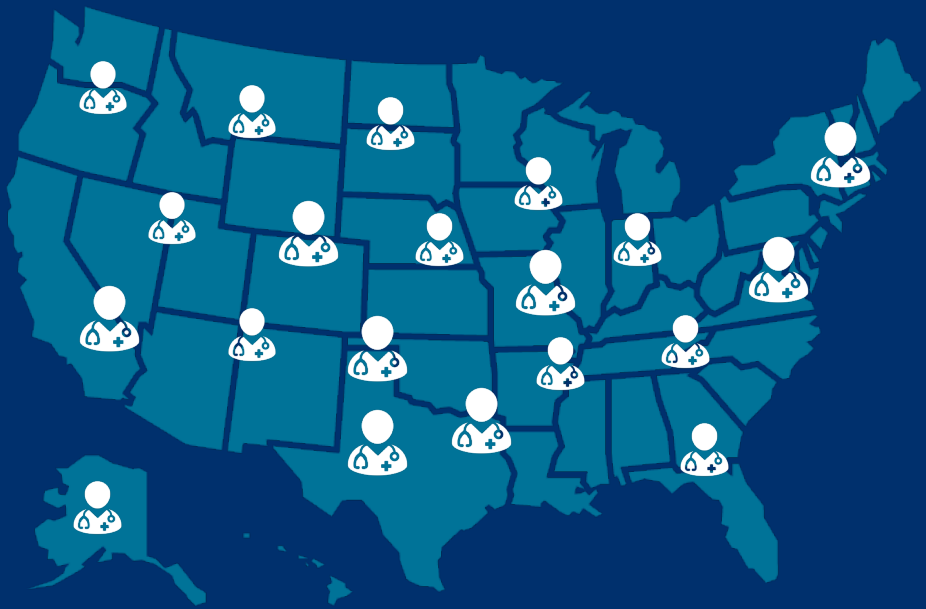


U.S. physicians overwhelmingly disagree

with Germany's
determinations
of the **value of
diabetes medicines.**



Some stakeholders have suggested that the U.S. rely on value assessments based on the system used in Germany to set prices for medicines. However, Germany's assessments regularly undervalue innovative medicines, which has contributed to access challenges for patients.

Since 2011, Germany's value assessment system has concluded 91% of innovative diabetes medicines result in no added benefit for patients. To compare U.S. physicians' views of medicines to Germany's determinations of value, 200 U.S. primary care practitioners and endocrinologists were asked to assess diabetes medicines' added clinical benefit based on the criteria used in Germany's value assessment process.



U.S. physicians disagree with
Germany's determinations of
the clinical benefit of **innovative
diabetes medicines** 89% of the time.

Of the U.S. physician responses that did
not align with Germany's determination
97% said the medicines provided
additional clinical benefit for patients.

A donut chart with an orange background. The chart is almost entirely filled with a darker orange color, with a very small portion of the top-left segment missing, colored in a lighter orange. The number "97%" is displayed in large white font in the center of the chart.

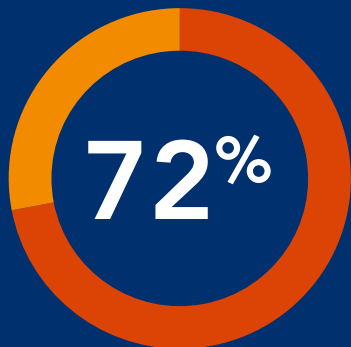
NOTES: This study focused on the added clinical benefit determinations made by the Federal Joint Committee (G-BA), which is "the highest decision-making body of the joint self-government of physicians, dentists, hospitals and health insurance funds in Germany." (Source: Gemeinsamer Bundesausschuss). Surveyed population included 100 PCPs and 100 Endocrinologists who treat more than 50 patients with diabetes per month (200 physicians total). The surveyed physicians provided 3,310 responses on the added benefit of 16 diabetes medicines for 66 total populations. Just 11% (356) of responses from U.S. physicians aligned with Germany's determination.

Source: Health Strategies Insights by EVERSANA, Custom Insights, November 2019.

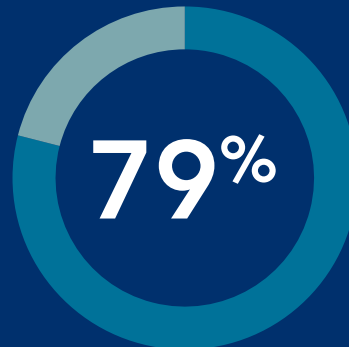


EVERSANA™

U.S. physicians say incorporating a broad range of value elements provides a more accurate picture of value for patients and caregivers.



of U.S. physicians say that considering a broad set of value elements will result in a more accurate assessment of a medicine's benefit to patients.



of U.S. physicians say that considering a broad set of value elements will result in a more accurate assessment of a medicine's benefit to caregivers.

Germany bases their assessments on a narrow set of outcomes. They do not include many aspects of a treatment's value that U.S. physicians believe are important.

U.S. physicians overwhelmingly agree that considering the following value elements— which are not included in Germany's assessments— are important when determining the value of a medicine:

