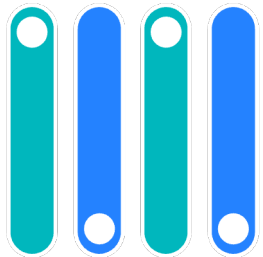


Access & Adherence

Pharmacy Innovation & Trends

February 29, 2024



Presenters



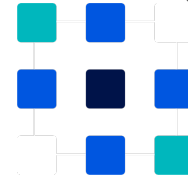
Brian Peterson

President - US



Patrick Hawthorne, RPh

SVP - Pharmacy Network
Development



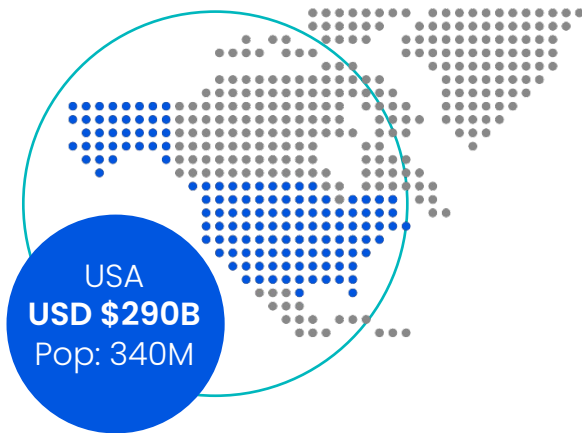
Pharmacy
Landscape
& Macro
Trends



Current Healthcare Landscape **NEEDS** Transformation

Annual global medication non-optimization cost **\$630 billion USD**

Cost of medication non-adherence to US government:



~**60%** of Americans have a chronic condition²



~**70%** non-adherence rate to long-term medications³



US Rx Use⁴
~**70%** pop. on **1 Rx**; **↑ 14%** from 2019
~**24%** pop. on **+4 Rx**; **↑ 6%** from 2019



100 million doses of adult non-Covid immunizations potentially missed during pandemic⁵



18M Americans cannot afford their medications⁶

Sources in notes.

The Power of Pharmacy

Community pharmacies are uniquely positioned to help drive this transformation



As healthcare prioritizes personalized care, the pharmacy is becoming a destination for expanded patient services.

Sources in notes.



Patients visit pharmacists up to **12x more** than prescribers¹



Pharmacists ranked as one of the **top trusted professionals**²



Pharmacies have become patients' **#1 vaccination destinations**³



~**80%** of patients see pharmacists as an **integral part** of their **care team**⁴



61% of Americans think **pharmacies** will provide most **primary care** in 5 years⁵

Pharmacy is Evolving

Quickly!



Evolving consumer **demand**



Competitive **threats accelerating**



More **operational challenges** & **specialization**



The **role** of the pharmacist **is expanding**



Pharmacies becoming **wellness centers**



Pharmacy staff **shortages & fatigue**



Embracing **AI, innovation & sustainability** is existential



Expanded Pharmacy Healthcare Services

Pharma Contribution by Vaccine Category

- Pharmacies have become patients' **#1 vaccination destinations**¹
- **All 50 states & D.C. allow pharmacists to administer vaccinations**²

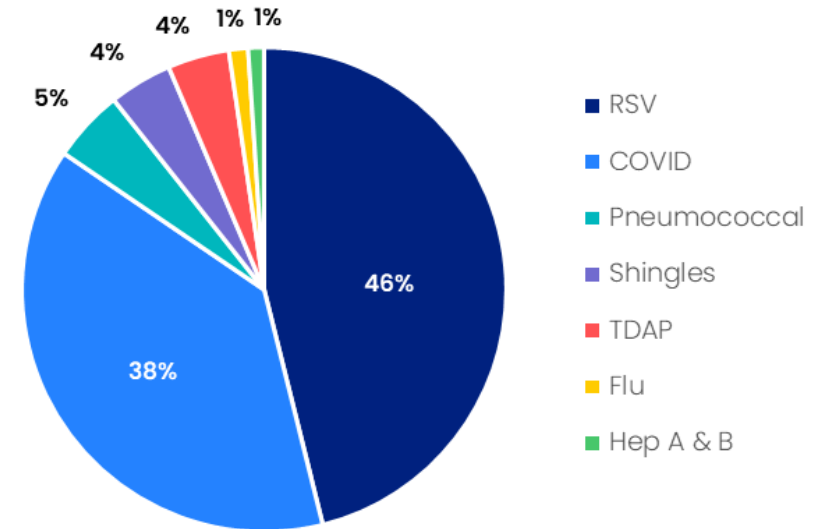
One of our digital vaccine awareness programs **reached over 8M patients** and generated **10.8% click-through rates**.



A participating pharmacy reported that **39% of patients that engaged a scheduler registered for a vaccination!**



Vaccine Patient Engagement



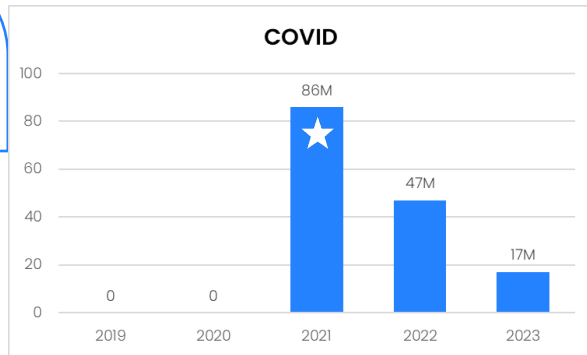
Program Contribution (July-December 2023)

Sources: MedAdvisor Solutions, Data on File, 2024; also in notes.

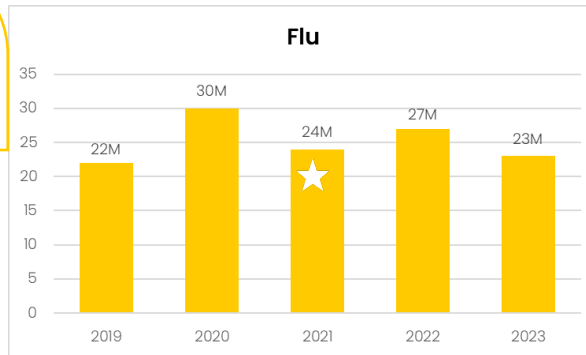
Expanded Pharmacy Healthcare Services

Vaccines: Trends by Type – Pharmacy Setting

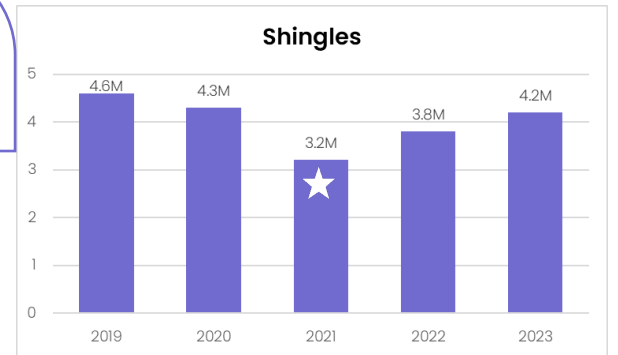
COVID vaccines continue to greatly decline



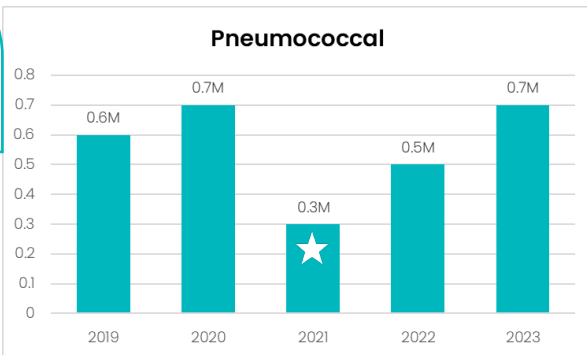
Flu vaccines have declined since 2020



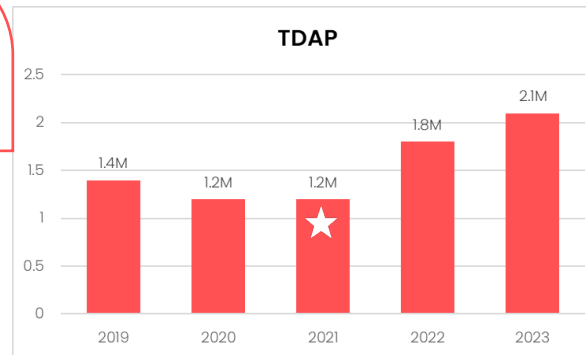
Shingles vaccines have stabilized back to pre-pandemic



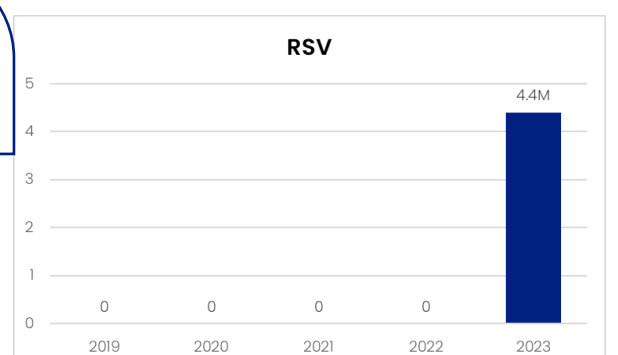
Pneum. vaccines have stabilized back to pre-pandemic



TDAP vaccines have grown



RSV off to strong uptake

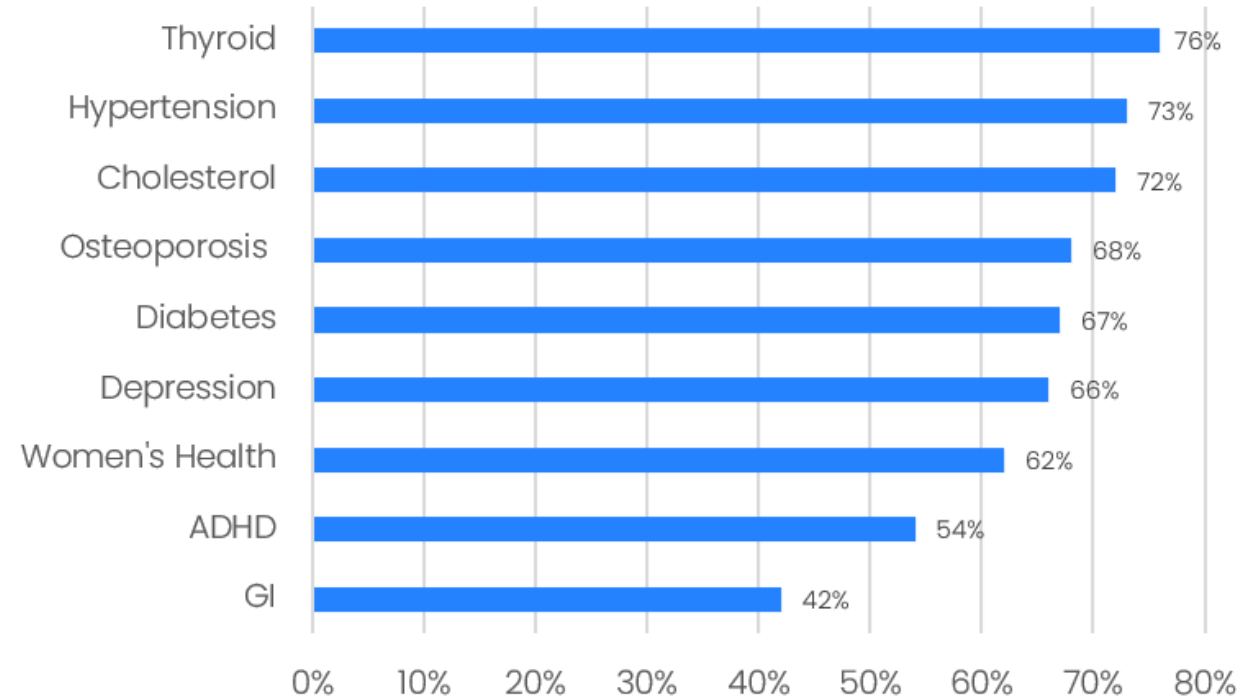


Source: MedAdvisor Solutions, Data on File, 2024.

Compliance by Disease State

All top disease categories fall below sub-optimal therapeutic efficacy


- **Patients continue to struggle** with their medication journey
- Large and potentially **concerning gap in women's health category**
- **Age & income show more variance** in adherence than gender



Source: MedAdvisor Solutions, Data on File, 2024.

How Does the Consumer Vote?

Majority of adults in the U.S. support pharmacists providing expanded care



Pharmacist Actions	% Support (Strongly + Somewhat)
Helping patients prevent chronic disease such as heart disease & diabetes	73%
Helping patients to understand their nutritional choices	76%
Testing for and treating common illnesses (i.e. flu, COVID-19, etc.)	74%
Testing for and treating common minor conditions such as strep throat and urinary tract infections (UTIs)	70%
Screening for diabetes	72%
Initiating treatment for diabetes (if screening is positive)	65%
Screening for high cholesterol	73%
Testing for sexually transmitted infections	64%

Sources in notes.

Pharmacy
of the
Future



Empowering The Pharmacy of the Future



- 1 Engages each **patient** individually
- 2 Pharmacists to have greater **patient** impact
- 3 Empowers good **patient** decision making
- 4 Provides **patient** better access to care
- 5 Simplifies **patients'** everyday lives

Empowering The Pharmacy of the Future



- 1 AI-enabled automated medication dispensing and bi-directional clinical messaging
- 2 Improved staff efficiency and **patient interaction**
- 3 Shift towards services and Omnichannel delivery
- 4 Digitization of pharmacy services
- 5 Pharmacy as front door to healthcare

