

## About the study

To give LIF a deeper understanding into why the use of innovative drugs differs between comparable countries, LIF has asked consultancy firm Opticom International Research to conduct approx. 200 interviews with leading specialists in four therapeutic areas and with representatives for relevant authorities and national organizations in six European countries: Sweden, Denmark, The Netherlands, Germany, the United Kingdom and France.

To get a comprehensive picture and highlight different aspects that may play a role in the use of innovative drugs, focus has been put on four therapeutic areas: Alzheimers, anti-coagulantia, diabetes, and oncology. For these four areas IMS Health have provided LIF and Opticom with prescription data of innovative drugs, which have made the ranking of countries possible, which in turn has been used as a basis for discussion with the study's respondents.

**The study was conducted on behalf of LIF – the research-based pharmaceutical industry in Sweden**

LIF is the trade association for the research-based pharmaceutical industry in Sweden with about 80 members and associate companies who represent approximately 80 percent of the total sales of pharmaceuticals in Sweden. LIF represents its members in issues of common concern, assisting and informing them on questions vital to the industry.



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Opticom is a leading global consulting specialised in international market analysis. Our mission is to help our customers make better business decisions by transforming data and knowledge into strategic advice and concrete action plans. Since our foundation in 1987 we have undertaken hundreds of international projects across the world.

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## Differences in the use of innovative drugs

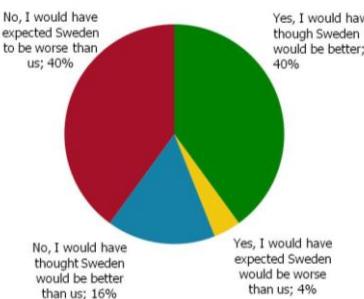
An international comparative study on behalf of LIF – the research-based pharmaceutical industry in Sweden



## Sweden stuck in the middle in the use of innovative drugs

Various studies have placed Sweden in the lower half of rankings regarding use of innovative drugs. For the four therapy areas this study focused on – Alzheimers, anti-coagulantia, diabetes and oncology – Sweden ranks 10<sup>th</sup> to 17<sup>th</sup> when comparing use of innovative drugs in 27 European countries.

For Sweden ending up relatively low in these international comparisons is somewhat surprising for a considerable share of the respondents. The image of Sweden as an innovative country with a high level of welfare is fairly widespread in Europe and for the healthcare sector to not be more forward-looking regarding the use of innovative drugs is something people react to.



## The benefit of innovative drugs not obvious to specialists

By analyzing the assessment of the importance of different stakeholders and initiatives, drivers and barriers for the introduction of innovative drugs and explanations of why countries should be regarded as leading or why they end up further down in international comparisons, a number of distinct factors that affect rates of use of innovative medicines appear.

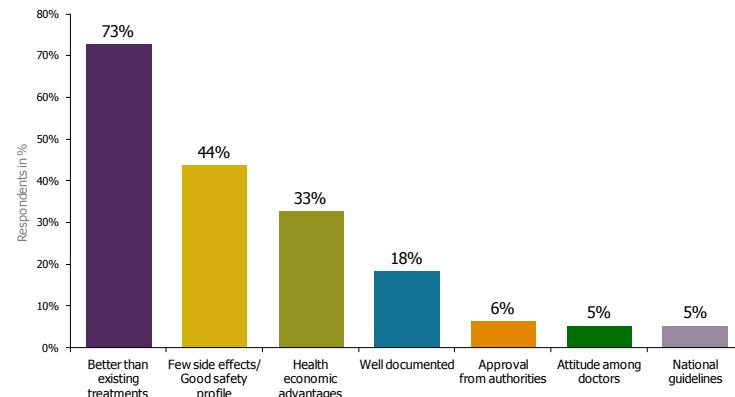
One important factor is the level of complexity in administration concerning the introduction of innovative drugs. The authorities' decision-making and the time required for evaluation is one aspect of this, the development of new treatment guidelines and national agreement on common opinions about the preferred treatment is another.

The reimbursement system also has a decisive influence while at the same time it is a given that one is prepared to pay for treatment that is considered to be cost-effective regardless of funding schemes. A certain level of focus on costs also inhibits the use of innovative drugs while at the same time a conviction that a new treatment may offer added value can increase the use of innovative drugs. Another factor that influences in this regard is satisfaction with existing treatments in some of the studied areas of therapy and the subsequent lack of need to change.

Various aspects of cooperation between the pharmaceutical industry and the profession also play an important role. Domestic research or the ability to conduct clinical trials accelerates the use of innovative drugs. Other possibilities for collaboration between the profession and industry are important, which also applies to the reputation or status of the industry on the local market.

Finally, other attitudes affect investments in the use of innovative drugs. An important factor is policies that follow from the perception of a disease. In addition to this there are also some cultural differences, the Netherlands and Sweden are relatively more conservative when it comes to the introduction of new drugs and have a stronger culture of seeking consensus before making decisions; Denmark is more sympathetic to innovation while France is influenced by a generous use of medicines in general.

Which factors do you consider to be driving factors leading to the adoption of innovative drugs?



## Use of innovative drugs not linked directly to improved quality of care or quality of life for patients

There is some tendency for respondents in countries that rank highly in the selected therapeutic areas to state that the higher use of innovative drugs has led to positive effects on quality of care and quality of life for patients, while a number of respondents in the countries of the bottom in international comparisons indicates a negative impact on quality of care and patients' quality of life.

This connection is, however, not obvious to all respondents. The explanation for this may lie in the fact that most doctors do not believe their own patients are under-treated and therefore only focus on the positive aspects for patients without recognizing that more people would benefit from a more modern treatment.

## More research and development and information about benefits important to increase the use of innovative drugs

In addition to the formal and financial aspects related to the introduction of innovative drugs, there are a number of areas where various measures may contribute to increased use of innovative medicines. Increased research and development, information about benefits and value of new treatments and clear national treatment guidelines are among the main improvement proposals.