

AnswersOn Irritable Bowel Syndrome



Irritable Bowel Syndrome (IBS) is a gastrointestinal condition in which abdominal pain is associated with a range of other symptoms.

Typically, these symptoms include diarrhea, constipation, interchanging episodes of diarrhea and constipation, bloating, urgency and mucus in stool. Symptoms can change over time and vary by patient. There may be periods when IBS symptoms flare up as well as periods of remission. **Nearly 4.7M office visits** were associated with Irritable Bowel Syndrome in MAT ending June 2023.

TreatmentAnswers Data

In the **12 months ending June 2023** HCPs reported the following regarding office visits in patients diagnosed with IBS (ICD-10 code K58)



- **Majority of patients are women**
74.0% of office visits were with **female patients**



- **Over half are seen by a specialist**
65.9% of patients were seen by a gastroenterologist, while **23.6%** were seen by a **PCP**.



- **66% are between the ages of 18 and 45**
Out of that percentage, white or caucasians account for **62.2%**



- **IBS is typically treated with a prescription**
87.1% of office visits resulted in a **prescription** for drug therapy.

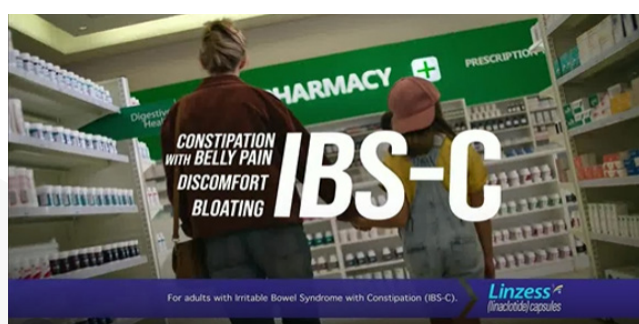
Source: AnswerSuite TreatmentAnswers

PromotionalAnswers Data

Between **July 2022 and June 2023**, Biopharmaceutical companies...

spent approximately
\$598 million
on the promotion of IBS prescription brands

More than one-third of the promotional investment in the gastrointestinal space is allocated to Linzess
\$212 million



Direct-To-Consumer advertising accounted for

\$35 million
or 16.5% of Linzess' spend, which included TV, radio and Internet

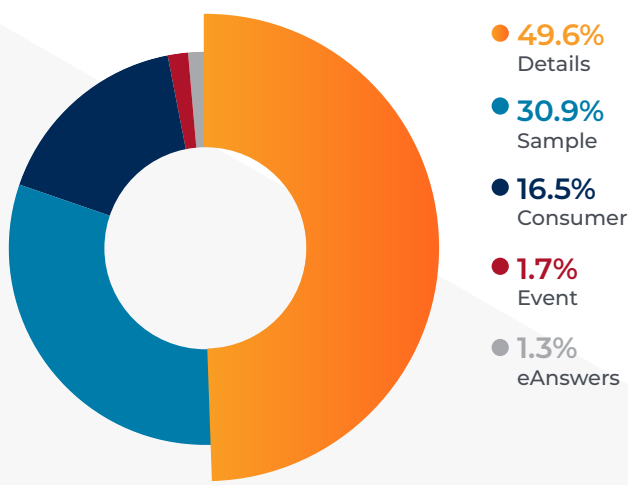
Source: AnswerSuite PromotionalAnswers/Kantar Media

Linzess, indicated for Irritable Bowel Syndrome with Constipation (IBS-C) or Chronic Idiopathic Constipation (CIC), led the IBS prescription market in drug-rep interactions with

\$105 million
in detailing spend

Source: AnswerSuite PromotionalAnswers/Kantar Media

Linzess Promotional Spend SOV MAT June 2023



Note: IBS diagnosis was defined as ICD-10 K58. The IBS drug market was defined as USC 05100, 05300, 23110, 23120, 23130, 23200, 23300, 23510, 23520, 23530, 23590, 23610, 23690 and 23900.

Reach out to one of our **AnswerSuite experts** for a complimentary report

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- **AnswerSuite a Syneos Health Company** provides a Proprietary syndicated Market Research Solution that utilizes a panel of thousands of healthcare providers over a 30-year period. AnswerSuite is consumed by the Biopharmaceutical industry with insights delivered through a SaaS platform or with full service from analysts.
- **TreatmentAnswers** captures and reports on patient visit interactions with HCPs. These insights include patient and HCP demographics, diagnoses, comorbidities and intended drug therapy.
- **PromotionalAnswers** tracks and monetizes promotional activities such as detailing, events, virtual engagements, and sampling. Through partnerships, professional journals and DTC advertising are also tracked.
- **Custom Insights** supports different use cases through a unique proprietary survey. Custom Insights answer a multitude of questions such as: What is the HCPs awareness of your brand and competitors? What is the message recall of your brand and competitor? What is the share of voice among HCP targets and non-targets? The quick studies supplement why the actions are being taken and inform multiple business strategies.