

PRIMARY RESEARCH STUDY



KOL Perception in Ulcerative Colitis Treatment

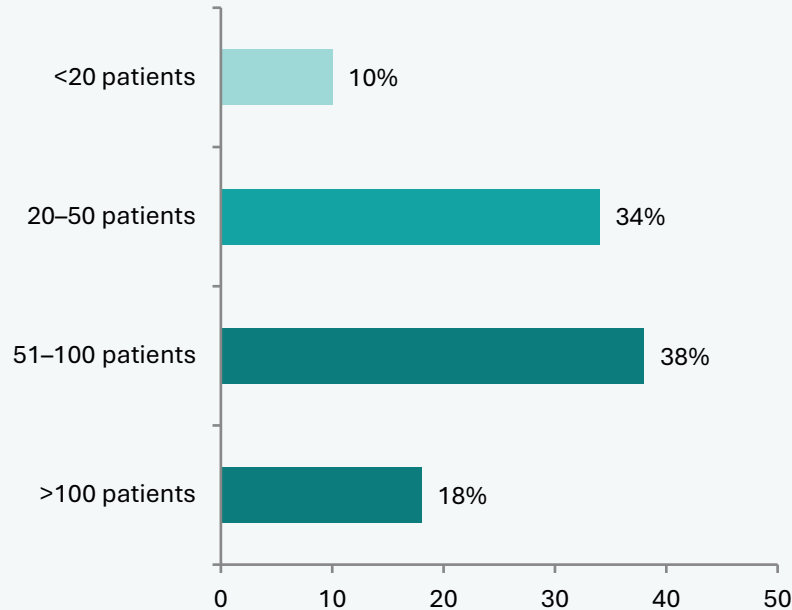
*Insights from 50 US & EU Key Opinion Leaders
on Current & Emerging Therapies*

n = 50 | US (n=25) · EU5 (n=25) | Moderate-to-Severe UC

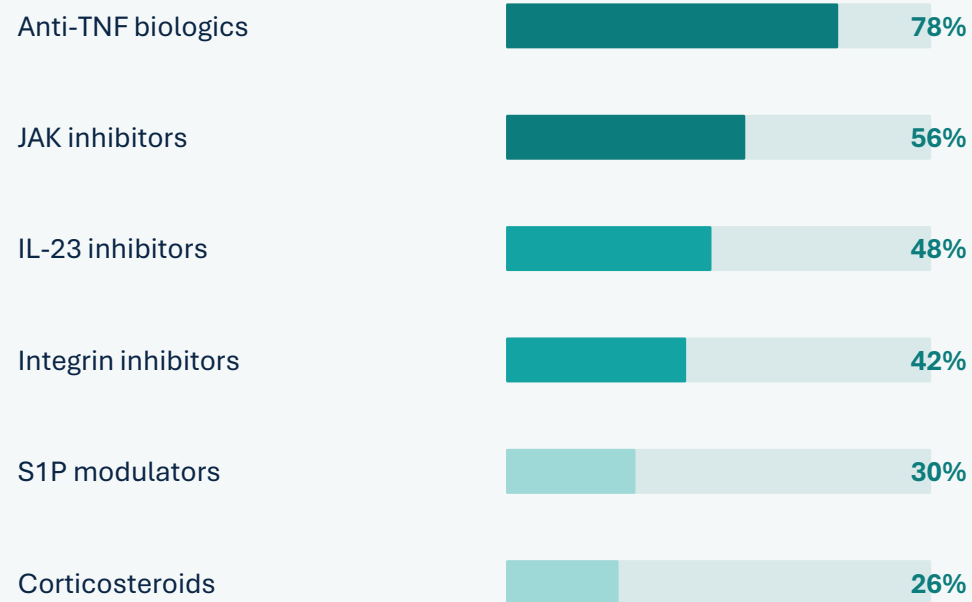
Respondent Profile & Treatment Landscape



Monthly Patient Volume



Most Frequently Prescribed Therapy Classes



Q2: Select Top 3 | Multiple selection, totals exceed 100%

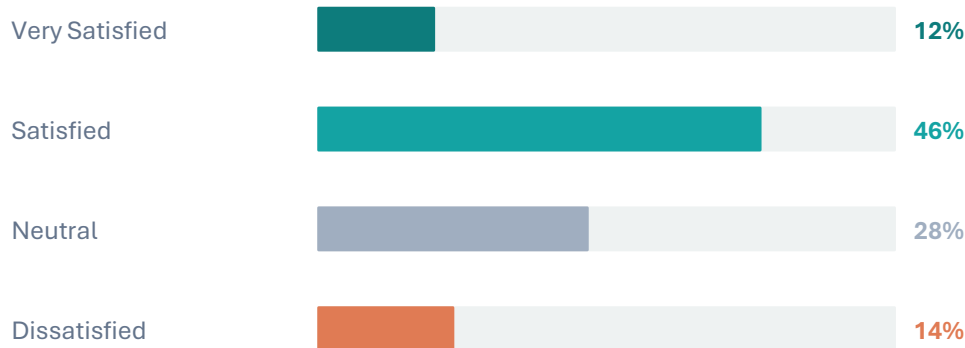
Satisfaction Levels & Unmet Needs



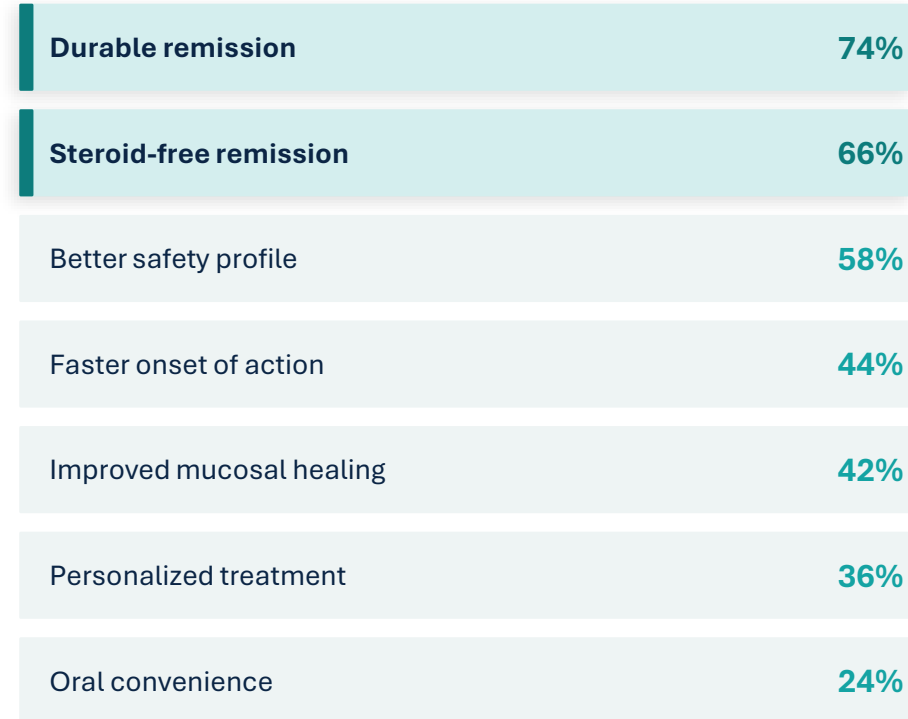
Overall Satisfaction with Current UC Therapies

58%

of KOLs satisfied or very satisfied



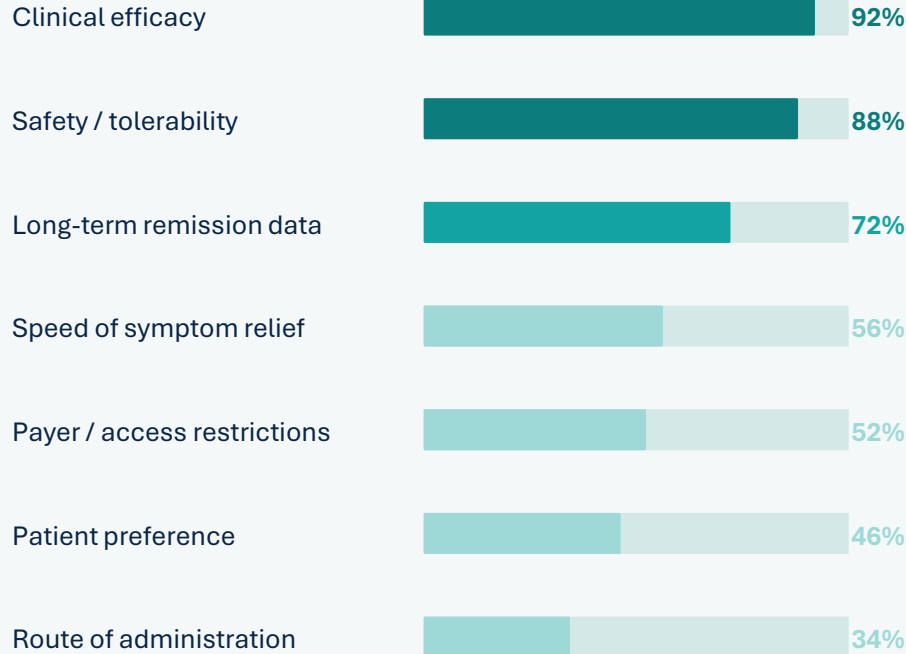
Top Unmet Needs in UC Management



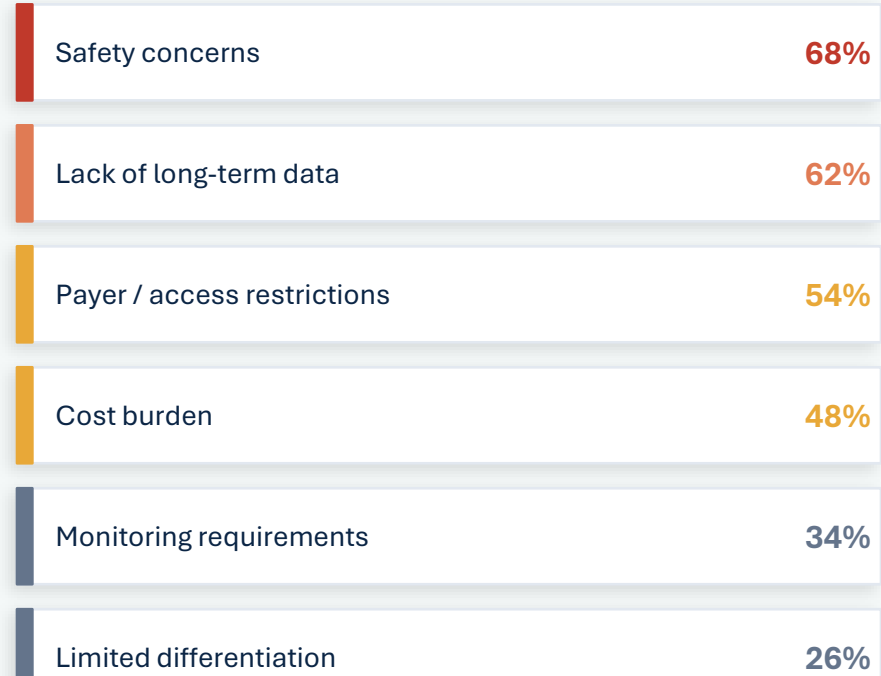
Q4: Select Top 3 | Multiple selection

Key Prescribing Drivers & Adoption Barriers

Factors Rated 'Highly Important'

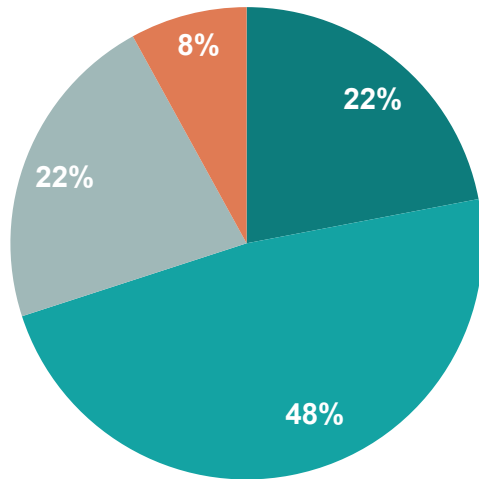


Major Barriers to Broader Adoption



Innovation Perception & Future Market Outlook

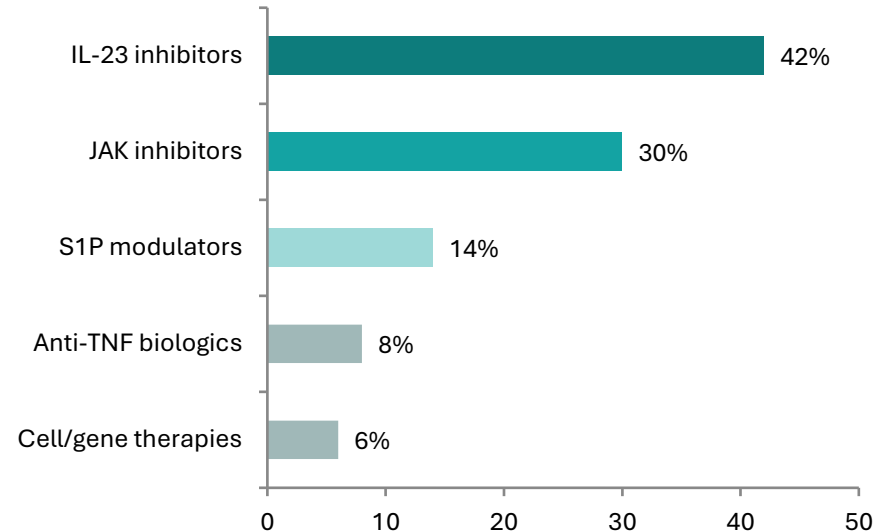
Newer Mechanisms vs. Traditional Biologics



■ Significantly better ■ Moderately better ■ Similar ■ Worse

70% view newer mechanisms as Moderately or Significantly better

Expected Highest Growth Over Next 3–5 Years



IL-23 inhibitors lead growth expectations at 42% — nearly 1.4× ahead of JAK inhibitors (30%)

Target Product Profile & Key Conclusions

Ideal Future UC Therapy Attributes



Key Study Conclusions

- 01 58% satisfaction leaves significant room for therapeutic improvement in durable remission
- 02 IL-23 inhibitors are positioned as the leading growth class over 3-5 years (42%)
- 03 Safety concerns (68%) and lack of long-term data (62%) are the primary adoption barriers
- 04 70% of KOLs view newer mechanisms as moderately or significantly better than anti-TNFs
- 05 Durable remission & steroid-free control dominate both unmet needs and ideal therapy profiles



Thank You

Do you have any questions?

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