

Timeless Women Survey Factsheet

Survey Structure and Sample

The *Timeless Women* survey was carried out to understand better the lifestyles and attitudes of women with osteoporosis and compare those with the beliefs of doctors who see and treat women with the disease. It was designed to find out who today's woman with osteoporosis really is, and in particular whether their treatment fits into their lifestyle or is convenient for them.

The survey was conducted in July 2008 by an independent market research agency, Double Helix, and supported by The International Osteoporosis Foundation, Medical Women's International Association, and Reader's Digest, with an unrestricted educational grant from Novartis.

Doctors surveyed saw at least 14 women with osteoporosis a month, with the average seeing 65 women with osteoporosis per month. The women surveyed were 55 years old or older, had been diagnosed with osteoporosis and were either currently taking medication for their osteoporosis or had taken medication in the last two years. The women interviewed were not patients of the doctors interviewed and all interviews were conducted anonymously by telephone.

Data was weighted using 'Rim weighting' to ensure the number of women surveyed was reflective of the total number of women with osteoporosis in each country. In a similar way, the data for doctors reflected the total number of doctors practising in each country surveyed. No quota was placed on the age or gender of the respondents. The average age of doctors surveyed was 51 years old and for women was between 55 and 64 years old. All interviews were conducted in the respondents' native language.

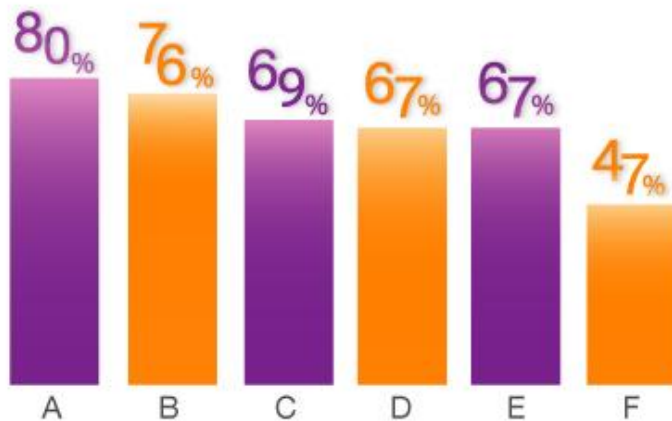
100 doctors and 200 women with osteoporosis were interviewed in France, Germany, Mexico, Switzerland and the UK, with a total survey population of 1,500.

Key Results Summary

1. Today women with osteoporosis work, travel and enjoy life with their families and do not want osteoporosis to prevent them from leading life to the full

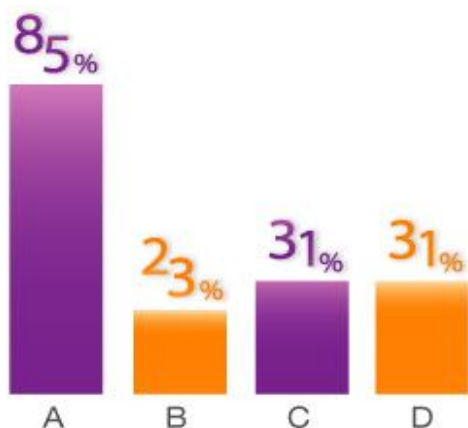
Specific activities carried out by women with osteoporosis	
Socialise with friends	93%
Carry out weight-bearing exercise (e.g. walking for exercise, running, dancing) each month	77%
Carry out weight bearing exercise at least once a week	64%
Engage in stress reduction (e.g. painting, flower arranging, yoga) each month	61%
Go on trips, holidays, rambling each month	38%
Undertake any form of charity or fund-raising work each month	27%

Concerns of Women with Osteoporosis



- A Becoming dependent on other people
- B Breaking bones
- C Becoming house bound
- D Not being able to do normal day-to-day activities
- E Not being able to lead an active life
- F Side-effects of treatment

2. The positive outlook of women with osteoporosis appears to differ from that of doctors who manage women affected by the disease

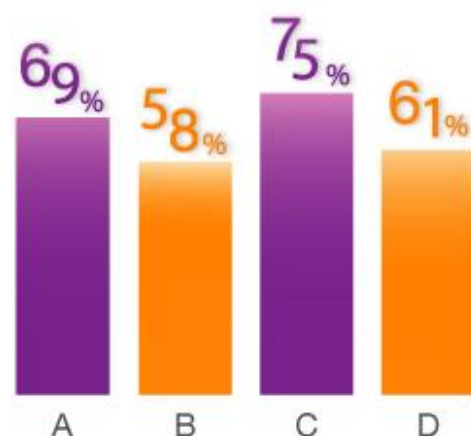


Perceptions of women with osteoporosis

- A Consider themselves as very or fairly active
- B Consider themselves as frail and fragile
- C Having osteoporosis has a negative impact on outlook on life
- D Feel that osteoporosis stops them from participating in day-to-day activities

Doctors perceptions of women with osteoporosis

- A Women with osteoporosis are not very active
- B I would describe women with osteoporosis as 'frail and fragile'
- C Osteoporosis has a negative impact on outlook on life
- D Osteoporosis prevents women from participating in everyday activities



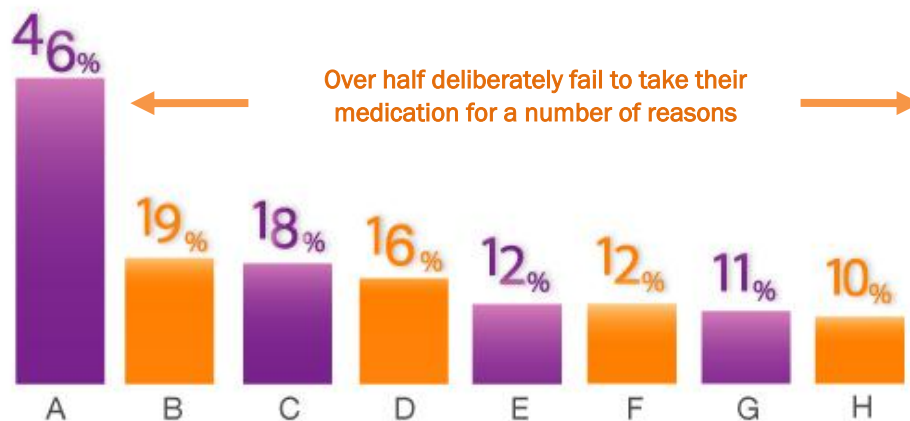
3. Many women don't always take their osteoporosis medication and therefore are at higher risk of fracture. Women need to take their medication as prescribed for maximum fracture protection

Compliance with osteoporosis treatment

Percentage of women with osteoporosis who have ever accidentally or deliberately skipped a dose of their osteoporosis medication	70%
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The reasons why women with osteoporosis do not take their medication

46% forget to take their medication



- A Forget to take their medication
- B Didn't notice any effects
- C Experienced side effects
- D Chose to take a break from medication
- E Found the treatment inconvenient
- F Do not think the treatment is effective
- G Treatment instructions are confusing
- H Don't believe they are at risk of bone fractures

4. The *Timeless Women* survey highlights that women with osteoporosis and doctors agree on the importance of finding an effective treatment that allows women with the disease to continue to maintain their lifestyle

Convenience of treatment

Factors considered by doctors when selecting osteoporosis treatments	Percentage of doctors who rank factor as most important	Percentage of doctors who believe patients would rank factor as most important
Protection from osteoporotic fracture/ efficacy	49%	34%
Increases in BMD	24%	13%
Side-effect profile	8%	16%
Convenience of use	6%	19%
Mode of action	6%	4%
Fast onset of action	7%	9%
Dosing frequency	3%	10%

Women with osteoporosis and doctors' views of the convenience of osteoporosis treatments

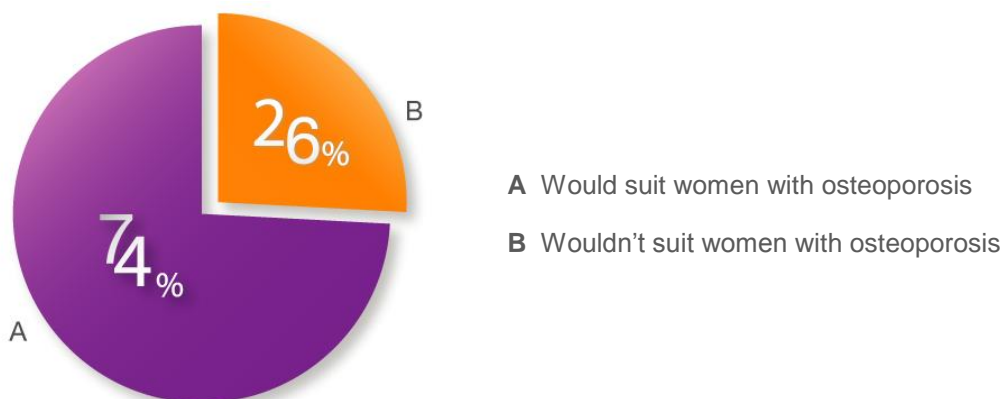
Doctors who agree that the convenience of osteoporosis treatments could be improved	83%
Women with osteoporosis who agree that the convenience of osteoporosis treatments could be improved	52%
Women with osteoporosis who believe that convenience should be a very important factor when deciding which osteoporosis treatment to prescribe	84%

5. Advances in science mean there is now a range of options for women with osteoporosis from daily to once-yearly, enabling women to manage their disease and maintain their lifestyle

Preferences of women with osteoporosis for formulation / dosing schedule*

Daily or more frequent oral medication**	17%
Weekly oral medication	29%
Monthly oral medication	16%
Quarterly (3 months) injection	12%
Yearly infusion	24%

Women with Osteoporosis' reaction to a less frequent dosing schedule



*This question was asked in the UK, France and Mexico only.

**NB: The majority of women were already on a weekly oral medication. If these women were offered a less frequent treatment, they would choose a once-yearly option over other frequencies such as monthly.