

The 3rd Annual Outlook on the Pharmaceutical Promotional Landscape Within Oncology

By Lesley Bailey

While the oncology pharmaceutical and biotech industry faces enduring change with on-going company consolidation, sales force restructuring, increased FDA scrutiny and major patent life expirations, the competitive brand marketplace continues to grow with new product entrants and expanding product labels—all fighting for that valuable face time with

oncologists. OBR continues to focus on these market dynamics and has coordinated with ImpactRx for a third annual year-end look at the promotional landscape of pharmaceutical/biotech sales representative detailing efforts that took place this past year. In addition, given the expanding focus of on-line promotion and clinical resource support, this year we sup-

plemented ImpactRx's longitudinal data collected from a nationally representative sample of over 475 medical and hematological oncologists with research and insight into oncologists' online behavior available through a joint offering ImpactRx has with comScore, a global leader in measuring digital traffic and readership.

Figure 1. Share of Attention – Sales Representative Oncology Product Details 2006-2010 (by Company)

This chart demonstrates the intense competition by the major oncology focused pharmaceutical and biotech companies to reach oncologists for sales representative detailing and brand discussions.

- » Novartis & Genentech continued to dominate the oncology sales rep promotion market given their multi brand portfolios.
- » Genentech had the greatest increase in share of product details in conjunction with the combining of field forces with Roche.
- » Genentech's increase can also be attributed to Rituxan's label expansion into CLL and Tarceva's NSCLC maintenance approval.
- » Merck's acquisition of Schering-Plough corresponded with increased detailing of Emend.
- » Pfizer also had an increase this year due to its acquisition of Wyeth and the resulting expanded oncology product portfolio.
- » Amgen's increase is partially a result of their REMS launch for Aranesp.
- » Sanofi-Aventis's continued loss of share year over year can be attributed to preparation and implementation of both Taxotere and Eloxatin going off patent, but partially stabilized by their Jevtana mid-year launch.
- » GSK launched both Votrient and Arzerra in 2010, resulting in an increase in company share.
- » Most of the other top companies maintained their share from 2008 to 2010 with minimal launches and/or field force expansions.

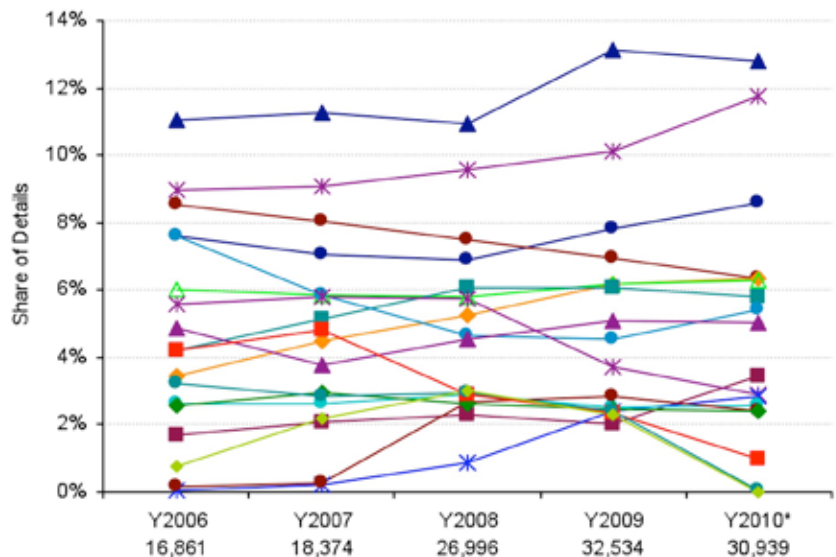


Figure 2. Top 25 Products Detailed by Sales Representatives 2009 vs 2010 (January–November)

As new products entered the marketplace and current products expanded their labels, older brands have lost their place in finding face time with oncologists.

- » Alimta maintained the top spot of highest number of details as reps promoted 1st line and NSCLC maintenance.
- » Taxotere decreased to the 11th most detailed product, due to decreased effort in preparation for anticipated patent expiration in Q4 2010. Sanofi appears to have migrated a portion of their detailing to Jevtana, which entered the top 25 despite it's mid year launch.
- » Avastin maintained the 2nd most detailed product in 2010 partially due to its multiple indications*.
- » Rituxan moved up 8 spots in detailing effort, primarily due to its CLL approval.
- » Tassigna joined the top 25, landing at the number 7 spot, as a result of the positive 1st line CML data and Novartis' subsequent shift in focus away from Gleevec promotion.
- » Emend was able to enter the top 25 as Merck acquired Schering-Plough and detailing increased accordingly.
- » Aranesp, Sprycel, Jevtana, and Nexavar all joined the top 25 most detailed products while Arimidex, Gleevec, Ixempra, Tykerb, Vidaza, and Exjade all dropped out.

2009 Rank	Brand	2010 Rank (Jan.-Nov.)	Brand
1	Alimta	1	Alimta
2	Avastin	2	Avastin
3	Taxotere	3	Erbix
4	Erbix	4	Revlimid
5	Revlimid	5	Tarceva
6	Tarceva	6	Rituxan
7	Femara	7	Tassigna
8	Treanda	8	Velcade
9	Arimidex	9	Abraxane
10	Gleevec	10	Treanda
11	Velcade	11	Taxotere
12	Xeloda	12	Sutent
13	Abraxane	13	Afinitor
14	Rituxan	14	Femara
15	Nplate	15	Nplate
16	Sutent	16	Neulasta
17	Neulasta	17	Vectibix
18	Ixempra	18	Xeloda
19	Afinitor	19	Zometa
20	Herceptin	20	Aranesp
21	Zometa	21	Herceptin
22	Tykerb	22	Emend
23	Vidaza	23	Sprycel
24	Vectibix	24	Jevtana
25	Exjade	25	Nexavar

Brands include detail totals for all indications for multi-indicated products. Oncologist (n=475).

Figure 3. Oncology Sales Force Top Tier Rating 2010*

When asked to rate the different company sales representatives they interact with on a daily basis throughout 2010 as “top, middle or bottom tier”, Genentech and OSI reps rose to the top followed by Biogen Idec, Amgen, Lilly, and Celgene.

- » Among companies with greater than 300 reported details during this time*, oncologists rated Genentech and OSI representatives “top tier” most often vs other companies.
- » Following closely were Biogen Idec and Amgen. Lilly and Celgene rounded out the leading performers as oncologists rated more than half (51% each) of their encounters with representatives as “top tier”.

Company	I Consider Representative “Top Tier”†
Genentech	55%
OSI Pharm	55%
Biogen Idec	53%
Amgen	52%
Lilly	51%
Celgene	51%
Millennium	50%
AstraZeneca	49%
Novartis	49%
Cephalon	47%
Sanofi-Aventis	45%
Merck	45%
GSK	45%
Spectrum Pharma	44%
Bayer Healthcare	43%
BMS	43%
Alexion Pharmaceuticals	42%
Abraxis Bioscience	42%
Genzyme	41%
Onyx	41%
Pfizer	41%
Allos	41%
Ortho Biotech	38%
Eisai	38%

*2010 data is YTD November 2010.

†Question is “I consider the Representative to be among the: Top tier, Middle tier, Bottom tier.” 2010 Oncologist (n=475).

Figure 4. Reach of Healthcare Websites (January–September 2010)

This chart shows the top healthcare sites visited by oncologists, with the percent of oncologists who visited at least one or more times.

- » The top health-related sites visited between January and September 2010 among oncologists were medscape.com, mdlinx.com, and nih.gov—a noticeable difference in top sites visited vs all other physician specialties combined.
- » NCCN.org was the most frequently visited oncology specific website, followed by ASCO.org.
- » Oncologists were less inclined to go to epocrates.com as compared to all other physician types combined.

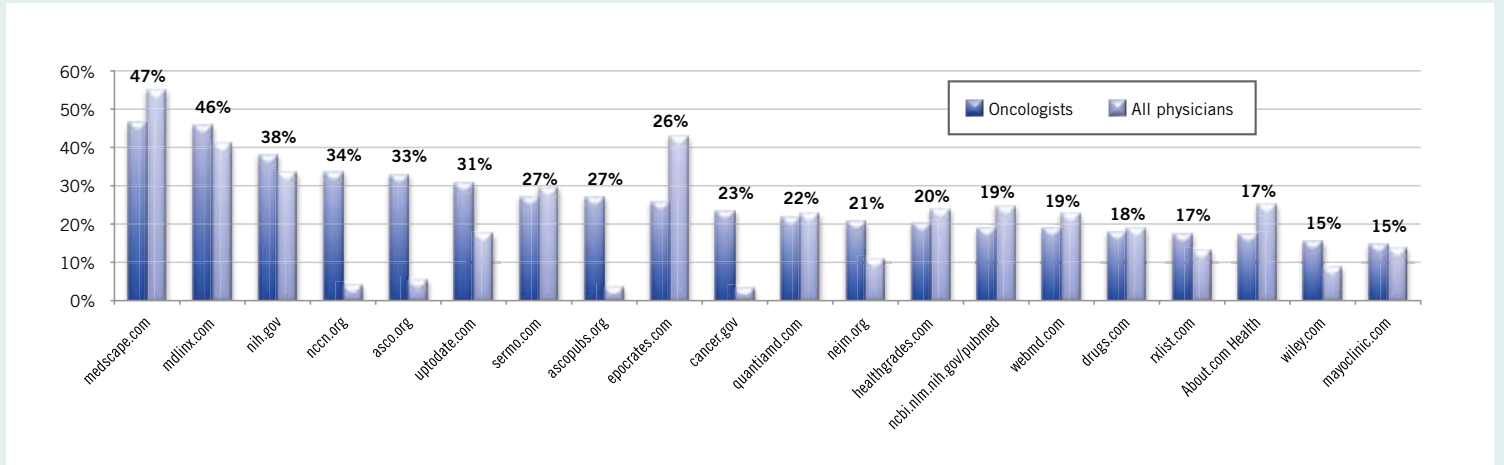


Figure 5. Average Number of Visits per Month (January–September 2010)

For the top healthcare sites visited by oncologists, this chart shows the average number of unique visits per oncologist per month.

- » In looking at repeat site use/visitation on a monthly basis, oncologists visited mdlinx.com and uptodate.com multiple times more often than the others.
- » While nih.gov had broad reach, oncologists did not visit the site at the same frequency as mdlinx.com and medscape.com.
- » NCCN.org had the most frequent visits of any oncology-specific sites.

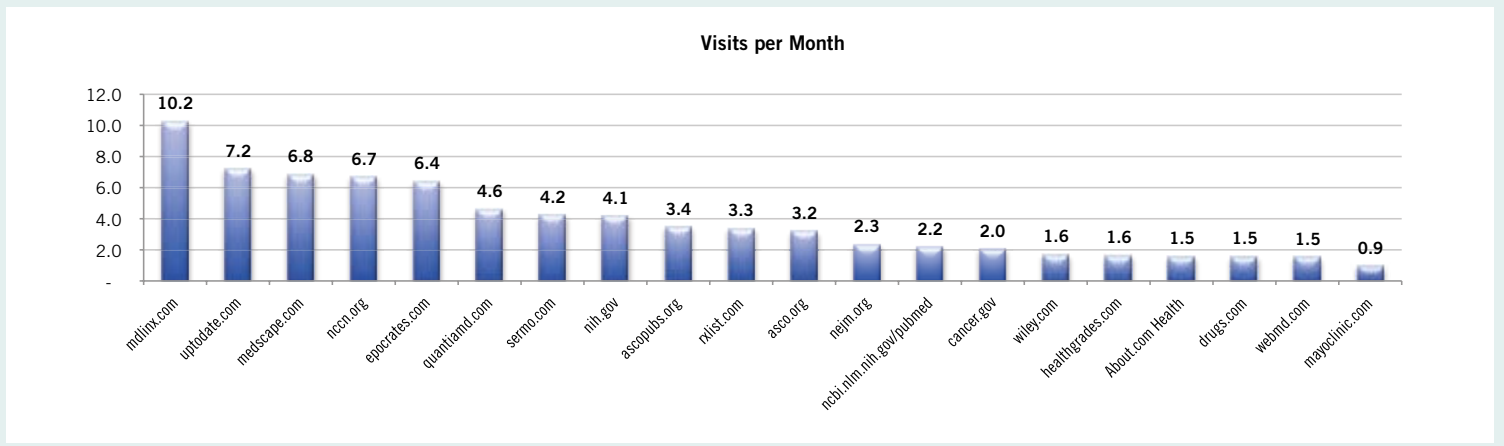
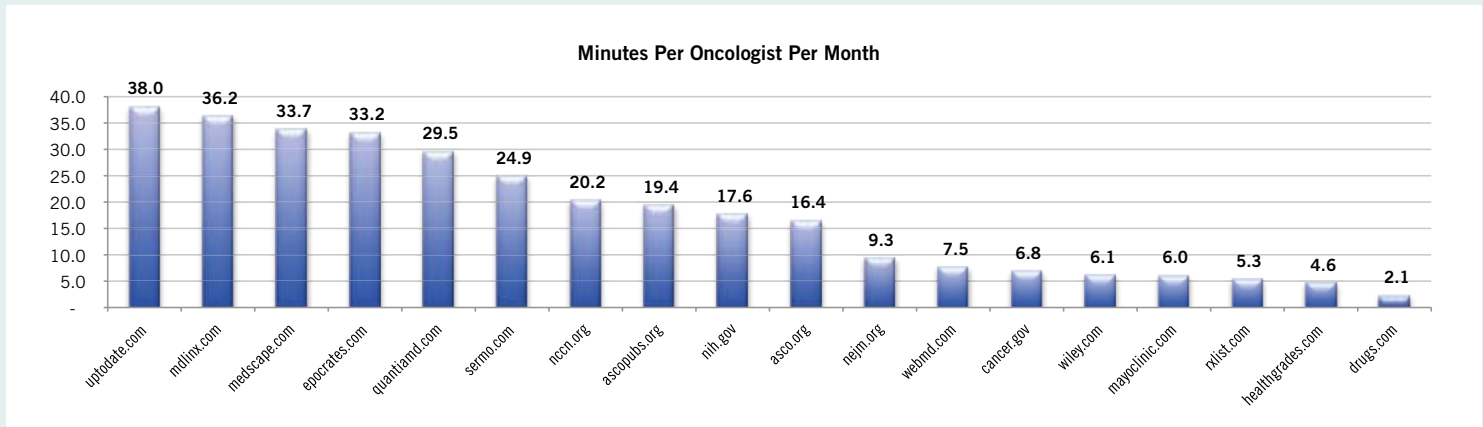


Figure 6. Average Time Spent on Site (January–September 2010)

This chart shows the average number of minutes spent by oncologists at each of the top visited healthcare websites per month.

» While medscape.com and mdlinx.com were the sites to receive the most unique visits from January-September 2010 by oncologists, they alternatively spent the most total time per month on uptodate.com. Epocrates.com rounded out the few group of sites that oncologists spent more than a half an hour on per month. **IB**



About the Contributors



ImpactRx specializes in measuring pharmaceutical and biotech industry sales and marketing effectiveness in Oncologists' offices. Within the proprietary ImpactRx system, they have a longitudinal network of 475 oncologists who use iPhone technology and proprietary software to provide real-time information regarding all sales representative promotion they receive, meeting and event attendance and a subset of their patient treatment decisions. The data presented here is information collected only from the sales representative detailing activity during the noted timeframes. comScore, Inc. is a global leader in measuring the digital world and preferred source of digital marketing

intelligence. comScore and ImpactRx teamed up to provide the comScore/ImpactRx Physician Behavioral Measurement™ solution, the only digital measurement solution that connects physicians' online and mobile behaviors to their actual prescription writing activities. This solution is carefully designed to comply with health privacy laws and regulations, and at no time is patient identifiable information provided by physicians to comScore or ImpactRx. The solution provides pharmaceutical marketers, advertising agencies and site publishers an unmatched view into physicians' use of digital media, helping them optimize their marketing and business strategies.

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