

A Year-End Look at the Promotional Landscape Within Oncology

By Lesley Bailey

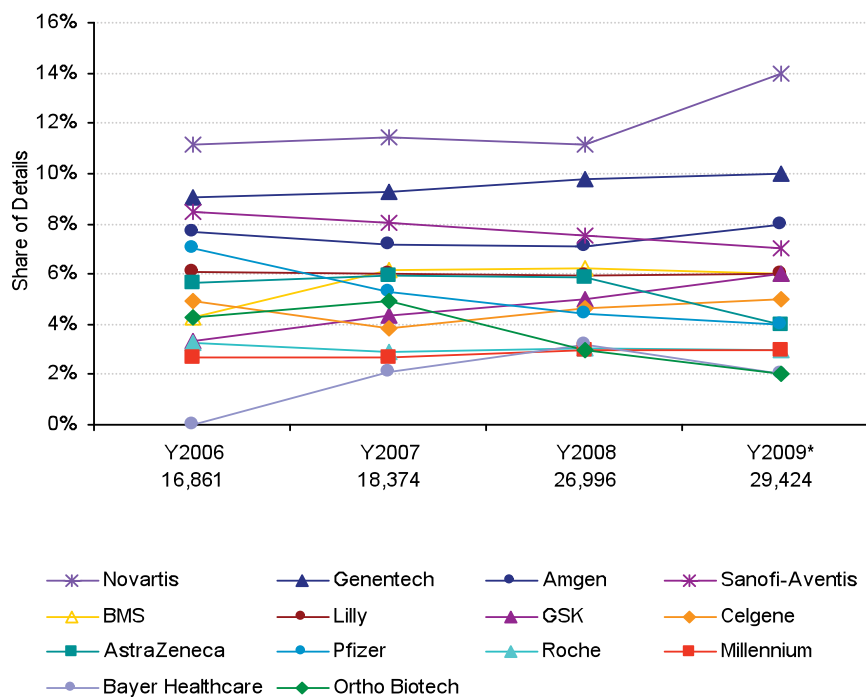
As the oncology competitive brand marketplace continues to grow with new product entrants and expanding product labels, we coordinated with ImpactRx for a year-end look at the promotional landscape faced by pharmaceutical and biotech sales representatives. Supplemented with ImpactRx's longitudinal data,

collected from a nationally representative sample of over 460 medical and hematological oncologists, was additional custom research to 100 oncologists to focus on some of the particulars related to interactions with their sales representatives.

Figure 1. Share of Attention

- » Novartis and Genentech continued to dominate the oncology sales rep promotion market given their multi-brand portfolios.
- » Novartis had the greatest increase in share of product details most likely due to the launch of Afinitor in March '09 and an increased focus on Zometa.
- » Genentech's slight increase may be attributed to Avastin's label expansion into both GBM and RCC indications.
- » AstraZeneca decreased by almost one-third. This may be attributed to the termination of the co-promote of Abraxane with Abraxis.
- » GSK had an increase year over year possibly due to the late '08 approval of Promacta. We anticipate their increase to continue in 2010 with the recent approvals of Arzerra and Votrient.
- » Sanofi-Aventis' continued loss of share year over year may possibly be attributed to Taxotere and Eloxatin going off patent in 2010.
- » Most of the other top companies maintained their share from '08 to '09 with minimal launches and/or field force expansions this year.

Sales Representative Oncology Product Details (2006–2009)



n = Total sales representative product details

*2009 data is YTD November 2009

ImpactRx panel of Oncologists has increased over time from 359 in '06 to 470 in '09.

Figure 2. Changes in Detail Frequency from 12 Months Ago

- » Approximately 50% of oncologists report a decline in representative visits from 12 months ago.
- » Access policies by oncologists have an impact on sales representatives:
 - » Reps seen by “appointment only,” restricted areas, restricted hours/days, restricted meals, restricted reps per day/week, restricted times a rep per brand can visit, and restrictions based on GPO membership
 - » Most rep access policies that have been in place for at least a year have stayed the same, while some have gotten more restrictive; none are less restrictive
- » Other factors that oncologists reported affecting sales rep access:
 - » Too busy to see representatives
 - » Work load is too high
- » About half of oncologists work in offices where nurses serve a function related to sales rep access.

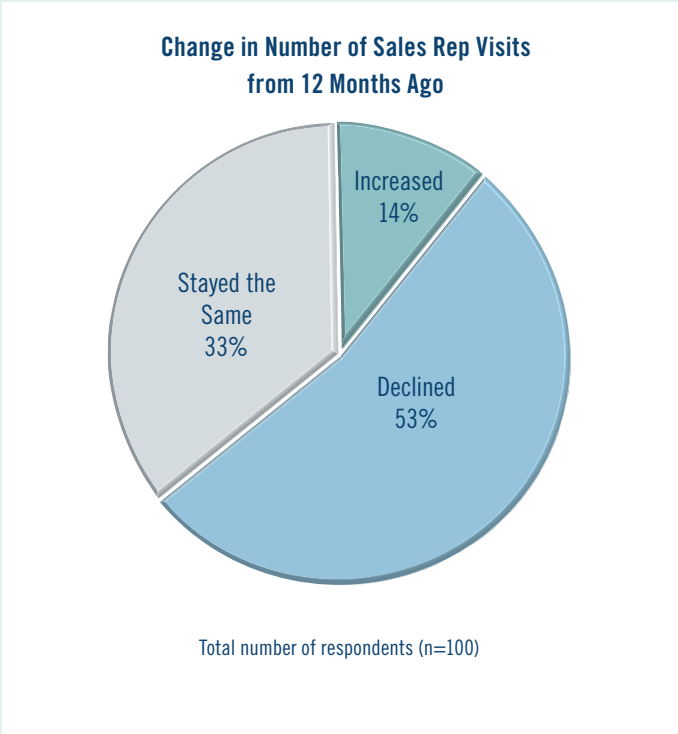
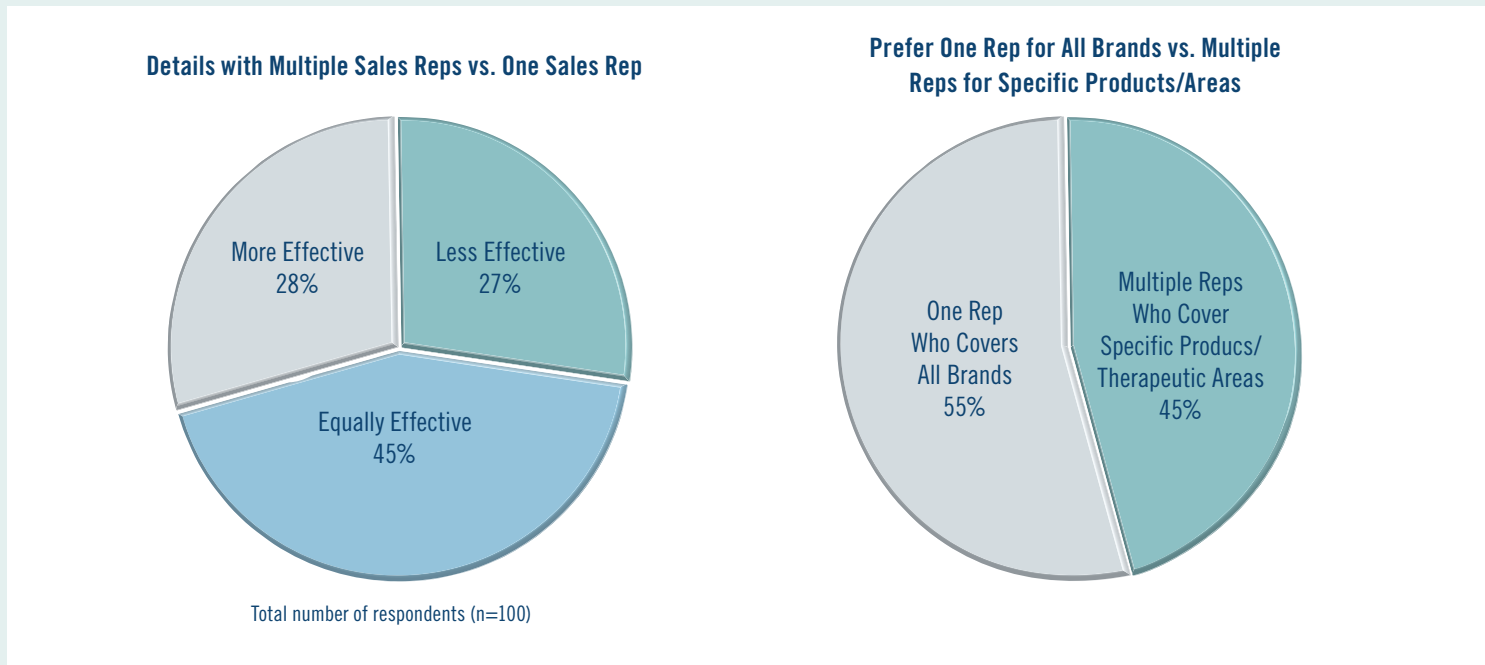


Figure 3. Effectiveness/Preference of Multiple Representatives vs. One Representative

- » There is no consensus regarding whether details with multiple sales representatives are more effective than details with only one sales representative in attendance.
- » Similarly, oncologists are split between those who prefer to interact with one company representative who covers all brands or multiple representatives from a company who covers specific products/areas.



cont. on pg 34 >>

Figure 4. Top 25 Products Detailed by Sales Representatives 2008 vs. 2009

- » Alimta gained the top spot in highest number of details. This was not surprising due to both the '09 maintenance indication and carry over from the late '08 first-line indication.
- » Taxotere decreased to the third most detailed product, most likely due to decreased effort in preparation for patent expiration in 2010.
- » Avastin maintained the second most detailed product in '09 partially due to its new GBM and/or RCC indications.
- » Abraxane decreased from its fourth rank in '08 to 15th in '09 most likely due to the termination of the co-promote agreement between Abraxis and AstraZeneca.
- » After Treanda's approval for both CLL and NHL in '08 and a full year of promotion it placed in the top 10 in '09.
- » Nplate, Afinitor, Zometa, Vectibix, and Vidaza all entered the top 25 most detailed products while Aranesp, Torisel, Nexavar, Emend, and Gemzar all dropped out.

2008 Rank	Brand	2009 Rank	Brand
1	Taxotere	1	Alimta
2	Avastin	2	Avastin
3	Alimta	3	Taxotere
4	Abraxane	4	Erbix
5	Armidex	5	Tarceva
6	Erbix	6	Revlimid
7	Velcade	7	Femara
8	Revlimid	8	Arimidex
9	Femara	9	Treanda
10	Xeloda	10	Gleevec
11	Tarceva	11	Velcade
12	Tykerb	12	Xeloda
13	Rituxan	13	Nplate
14	Sutent	14	Sutent
15	Treanda	15	Abraxane
16	Aranesp	16	Rituxan
17	Ixempra	17	Neulasta
18	Herceptin	18	Ixempra
19	Gleevec	19	Afinitor
20	Neulasta	20	Herceptin
21	Torisel	21	Tykerb
22	Emend	22	Zometa
23	Nexavar	23	Vidaza
24	Exjade	24	Exjade
25	Gemzar	25	Vectibix

Brands include detail totals for all indications for multi-indicated products.
 2008 Oncologist (n=430) 2009 Oncologist (n=470)

Figure 5. Oncology Sales Force Top Tier Rating 2009*

- » Oncologists rated Genentech representatives "top tier" most often among the companies with the greatest shares of details during 2009†.
- » Second place companies receiving top tier rating most often were Millennium, Lilly, and Amgen who tied at receiving that rating for 52% of sales representative details.

Company	I Consider Representative "Top Tier"
Genentech	56%
Millennium	52%
Lilly	52%
Amgen	52%
Celgene	49%
Sanofi-Aventis	49%
Novartis	48%
AstraZeneca	48%
Bayer Healthcare	46%
Roche	46%
Pfizer	46%
Merck	44%
BMS	43%
GSK	42%
Ortho Biotech	41%

*2009 data is YTD November 2009

†Question is "I consider the Representative to be among the:
 Top tier, Middle tier, Bottom tier"
 2009 Oncologist (n=470)

»» OBR DAILY NEWS FLASHES

The latest in cancer prevention? Researchers say munch on pistachios (lung cancer), eat tofu (breast cancer), drink beer (prostate cancer) and dine on omega-3 rich salmon (colon cancer). (AACR and other sources, 12/8/09 & 12/9/09)

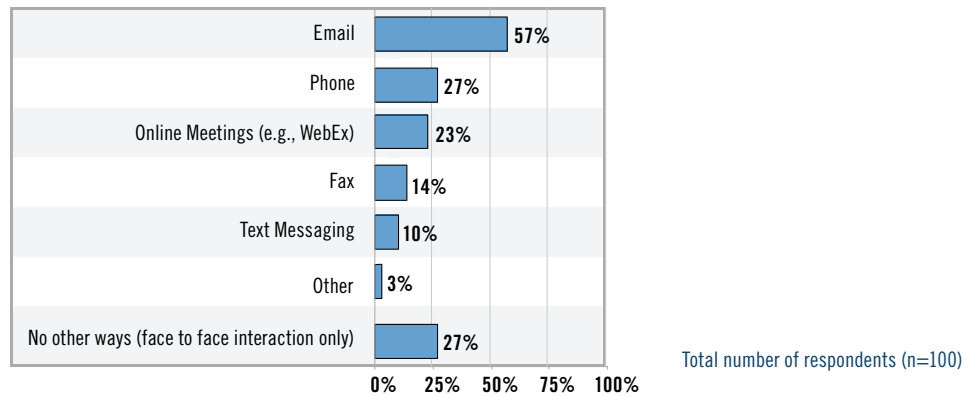
Multiple myeloma patients are spending almost twice as much on prescription drugs as the average cancer patient, based on an Association of Oncology Social Work (AOSW) survey. (AOSW, 12/2/09)

Far fewer women with breast cancer should be given anthracyclines, widely used chemotherapy drugs, because they increase the risk of heart failure and leukemia, UCLA cancer researcher Dennis Slamon, MD, PhD said at this year's SABCS. (Bloomberg, 12/12/09)

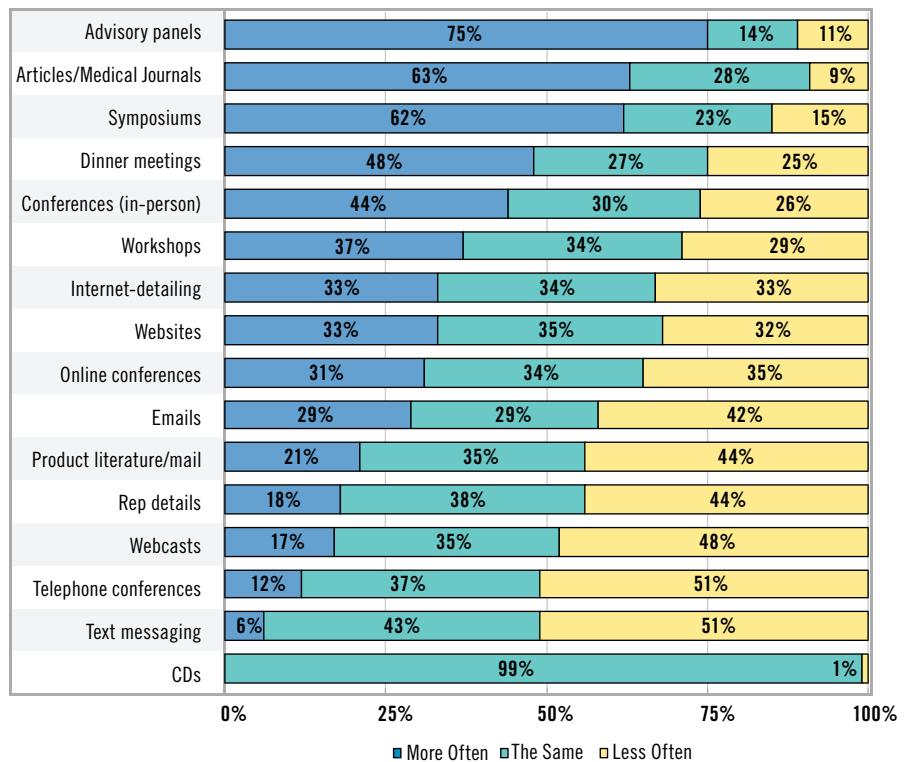
Figure 6. Alternate Methods of Representative Interaction Used and Preferred

- » Email is the most common alternate method that sales representatives use to interact with oncologists.
- » Advisory panels, articles / medical journals, and symposiums top the list of methods oncologists would like pharmaceutical companies to use more often.
- » About half would prefer less text messages and telephone conferences and webcasts.

Alternate Methods Sales Representatives Use to Interact With Oncologists



Alternate Methods Oncologists Prefer Pharmaceutical Companies Use to Interact



About the Contributors of this Survey



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 470 oncologists who use Smartphone 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 a compilation of information collected only from the sales representative detailing activity along with supplemental custom research during the noted timeframes. www.impactrx.com