

Competing for Image Leadership

By Peter Carlin, Ellen Gordon, Ruchika Kapur, and Shannon Clancy

Image leadership in oncology is taking on increased importance as performance, customer satisfaction and loyalty become inextricably linked to customer experience. In a world where physicians and other stakeholders try to understand complex therapies—and the flow of scientific information is integral to understanding that complexity—and where oncology companies battle each other to provide support to physicians and their practices, today’s image leaders are focused on creating successful customer-centric organizations and better customer experiences.

Being the leader in image not only creates a positive perception for those highly-ranked companies, but more importantly, drives those behaviors that are critical to being successful in today’s environment.

For several years, Market Strategies International has been analyzing image leadership—and how physicians and other stakeholders rate company performance—on over 30 sales, product/R&D and corporate equity metrics.

Using our proprietary MStImage™ methodology, we survey, on an annual basis, 465 oncologists and hematologists,

Figure 1. Likelihood of Oncologists to... (Top 2 Box Percentages; n=290)

As the graph suggests, image leadership helps companies connect to their customers in a world where relationships are more difficult and battlegrounds for share of voice reach beyond the traditional marketplace. As competition for stakeholder commitment intensifies, image leadership becomes a more tangible asset.

Companies that become image leaders are able to drive “engagement” behaviors with their customers and truly derive the benefits of performance. The challenge to companies, however, is to identify these engagement behaviors (or customer touch points), measure performance against their competitors, and understand how performance leadership can have a positive impact on customers’ experience.

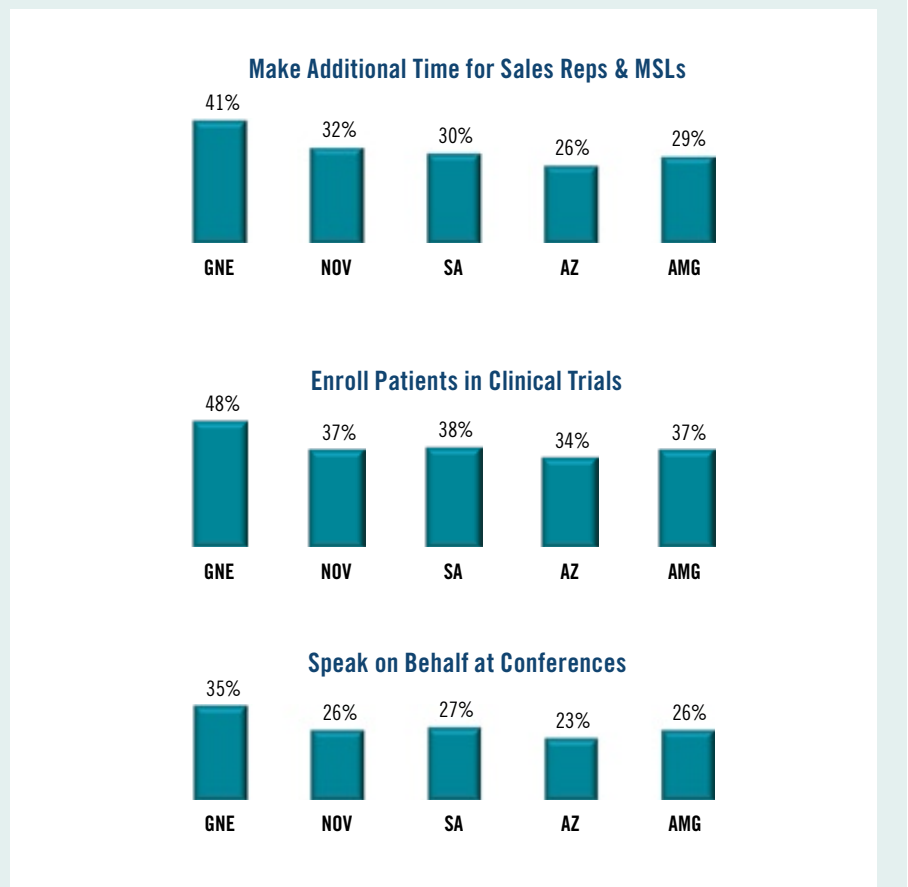
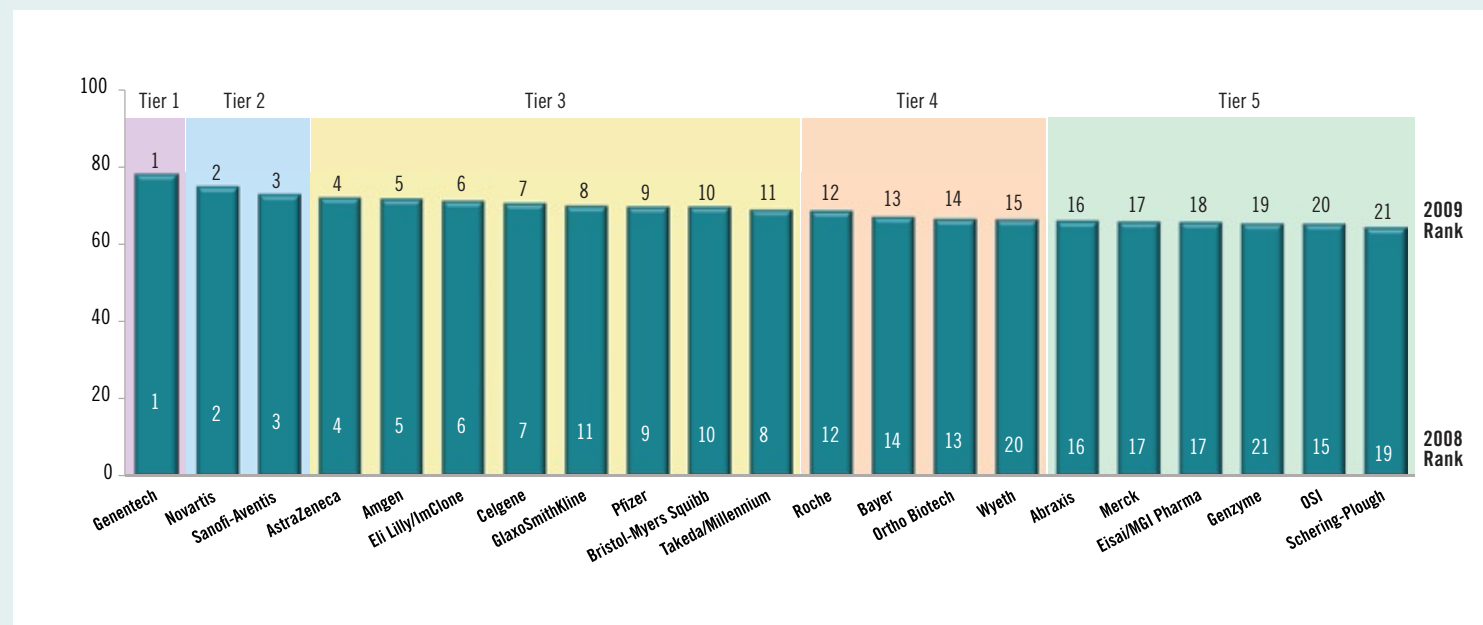


Figure 2. 2009 MSImage Rankings—Office-based Oncologists



100 oncology practice managers and 100 oncology nurses to determine who are the image leaders, which attributes most differentiate companies (key drivers), and how companies can improve their image and performance.

Why Genentech is the Image Leader

For the past four years, Genentech has been the overwhelming image leader in our annual research; and in 2009, Genentech achieved, for the first time, a number 1 ranking with all stakeholders—office and hospital-based oncologists, hematologists, oncology practice managers and oncology nurses. While their ranking was only significant among office-based oncologists, their continued domination raises two questions:

- What is Genentech doing to be ranked in first position; and
- Is any company close to challenging Genentech?

Among office-based oncologists, which will be the focus of this article, Genentech continues to significantly lead over all other companies. Our MSImage solution, which ranks companies with the highest scores on the attributes that matter most to physicians, shows that the top seven

companies in 2009 were the same as 2008. GSK, which finished 8th, showed the biggest gain, moving up from 11th position and displacing Takeda/Millennium.

Our methodology determines image leadership by a company's performance across three dimensions:

- its products and innovative approach to research and development;
- its delivery of information via sales representatives and other core contacts; and
- its corporate commitment (including trust) to meeting the needs of its customers, their practices and their patients.

Not surprisingly, key to Genentech's dominance has been its "ownership" of the Product/R&D dimension. Being recognized as the leader in science and innovation provides Genentech with the opportunities to communicate scientific learnings, provide supportive materials and deliver value-added programs designed to help customers.

[cont. on pg 20 >>](#)

Figure 3. Top 10 Companies in MSImage Dimensions (Office-based Oncologists)

As the graph to the right indicates, Genentech leads in all three dimensions and its lead is significant in the Product/R&D area. Novartis remains second in 2009, and continues to challenge Genentech in the sales and corporate equity dimensions, followed closely by Sanofi-Aventis. AstraZeneca and Amgen have been trading 4th and 5th positions for the past few years but the most surprising performance has been by Celgene, which finished in 5th position among oncologists in sales force performance and is challenging Lilly, Amgen and AstraZeneca for overall 5th place among office-based oncologists.

Rank	Sales Force	Corporate Equity	Product/R&D
1	Genentech	Genentech	Genentech ↑
2	Novartis	Novartis	Novartis
3	Sanofi-Aventis	Sanofi-Aventis	Sanofi-Aventis
4	AstraZeneca	AstraZeneca	Amgen
5	Celgene	Amgen	AstraZeneca
6	Eli Lilly/ImClone	Eli Lilly/ImClone	Eli Lilly/ImClone
7	Amgen	Celgene	Celgene
8	Pfizer	GlaxoSmithKline	GlaxoSmithKline*
9	GlaxoSmithKline	BMS	Pfizer*
10	BMS	Pfizer	BMS

*Indicates a tie between companies ↑ Denotes Genentech is significantly ahead of all companies

Figure 4. Top 5 Companies on Key Driver Attributes (Office-based Oncologists)

In order to do well in our overall analysis, as well as the individual dimensions, a company must perform well on the key driver attributes—those that are most predictive of image. Not surprisingly, the top 5 companies tend to deliver the strongest performance on the key driver attributes. Companies which fell just out of the top five, like GSK and Celgene, scored impressively on a few of the key drivers. GSK's 5th place performance on trust, Celgene's top 5 ranking on both developing beneficial products and innovative R&D, and Lilly's top 5 performance on several sales force attributes are a few examples.

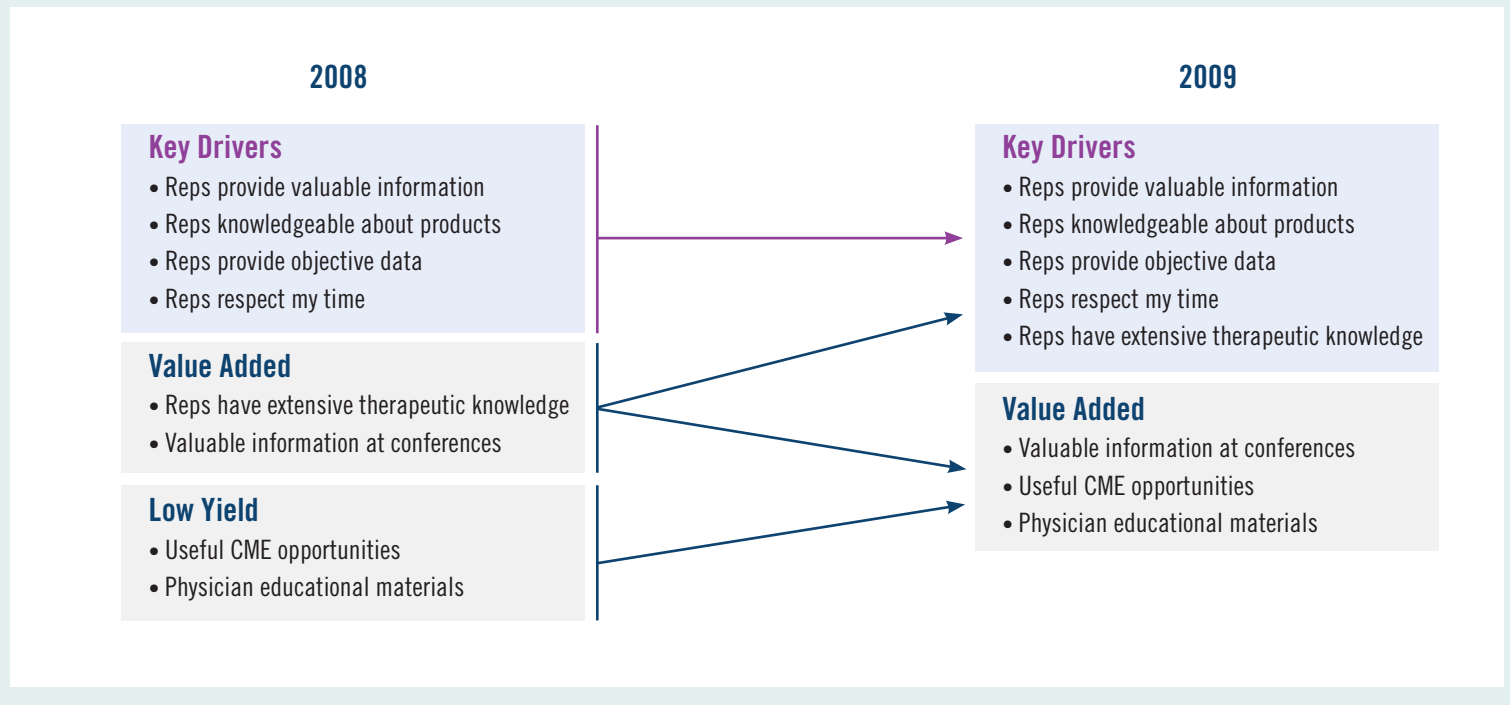


Figure 5. Information-Related Attributes

Along with innovative and scientific leadership in the R&D dimension, leading companies also are characterized by strong performances in ensuring information flows from the company to their customers, whether in a physician's office, in patient materials, at medical meetings like ASCO or in a CME program.

In this study, physicians identified several information-related attributes as critical drivers of image. One metric, "Reps have extensive therapeutic knowledge," suggests that oncologists want field force personnel to be knowledgeable about the science of tumor areas and not only the products that they detail.

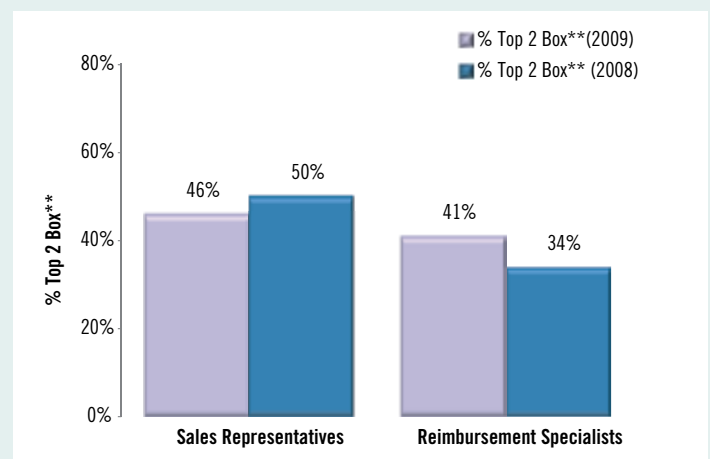
Given the increased barriers for sales reps, and the prevailing attitude that physicians want to hear more about new clinical issues and emerging research trends, we may be witnessing the evolution of a new sales representative for the future. When coupled with the kinds of products and compounds now in company pipelines, the future sales rep will need to have both therapeutic and product expertise so as to provide value added services to physicians, nurses, office staff, and ultimately to their patients, while operating in accordance with legal guidelines. Based on the physicians in our study, it appears that companies like Genentech and Novartis have started to make the future today.



Patient Assistance Programs

One area that has grown in importance among office-based oncologists, nurses and practice managers over the past few years has been the emergence of reimbursement specialists, those company personnel who help practices and their patients obtain reimbursement and access to patient assistance programs (PAPs). While physicians still place the highest value on sales representatives, our study suggests that reimbursement specialists continue to increase in importance as a core contact, and to some extent, in inverse proportion to the diminishing interactions with sales reps.

Figure 6. Value of Company Personnel



cont. on pg 22 >>

But, as the next chart indicates, companies have not really differentiated themselves in this area. When oncologists are asked, who does a good job in “facilitating drug reimbursement,” it’s not surprising that Genentech is the leader, given its product line, but what is intriguing is that its lead is narrow and could be overcome by a stronger

competitive performance. Similarly, physicians see little differentiation in PAPs, even though Genentech leads the top seven. When asked, “Which company provides patient assistance/indigent patient programs that are easy to use,” no company stands out.

Figure 7. Value of Reimbursement Support (Top 10)

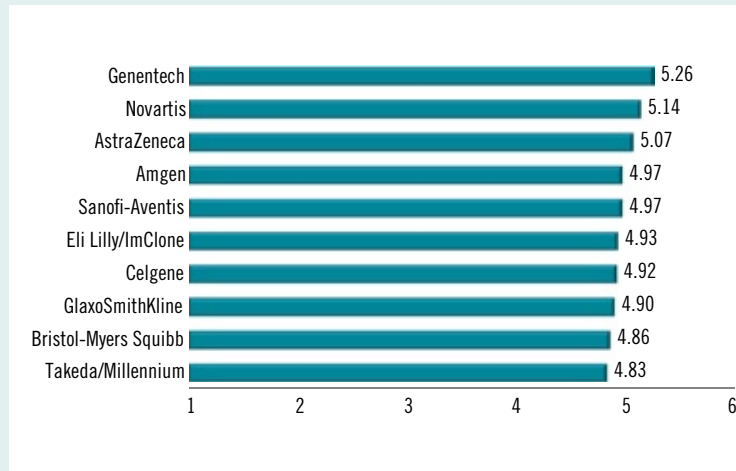
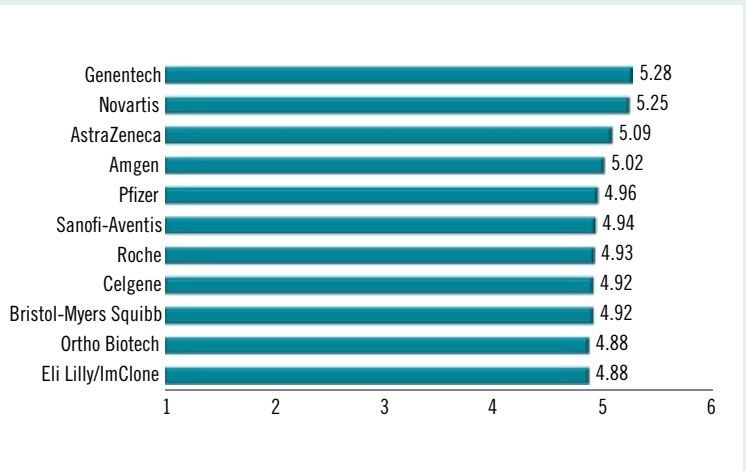


Figure 8. Easy to Use PAPs (Top 10)



Conclusion

Unlike the traditional “mass market,” the world of oncology has long required companies to provide a broad array of services and programs to support their products. Connecting to the customer has become even more critical today because of the competitive need to inform, educate, and support physicians and their practices. With the reality of less access, companies need to perform at higher levels if they want customers to remain committed and loyal.

Genentech, more than any other company, has recognized the value of image and the positive behaviors emanating from a strong leadership position. They continue to perform better than any other company on metrics that matter most to oncologists. And while their scientific-based and innovative products continue to dominate the oncology marketplace, our study indicates that it would be a mistake to ignore Genentech’s leading performance in the areas of corporate equity and field force dimensions, where trust, information, and strong programs and services prevail. **PC EG RK SC**

About The Contributors Of This Survey

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Market Strategies International is a full-service market research and consulting firm with extensive experience in the communications, energy, financial services, healthcare, and technology sectors. Market Strategies employs more than 250 senior consultants, researchers, statisticians, and project managers and specializes in the areas of customer satisfaction and loyalty, market opportunity assessment, market segmentation, message and communications testing, usability evaluation, and brand assessment and management. **Please visit www.marketstrategies.com for more information.**

Study Description: Market Strategies International conducted its annual MSImage study with 290 office-based oncologists, 75 hospital-based oncologists, 100 hematologists, 100 oncology practice managers and 100 oncology nurses between January and March, 2009. A total of 21 companies and 31 attributes were evaluated by office-based oncologists in an online questionnaire.