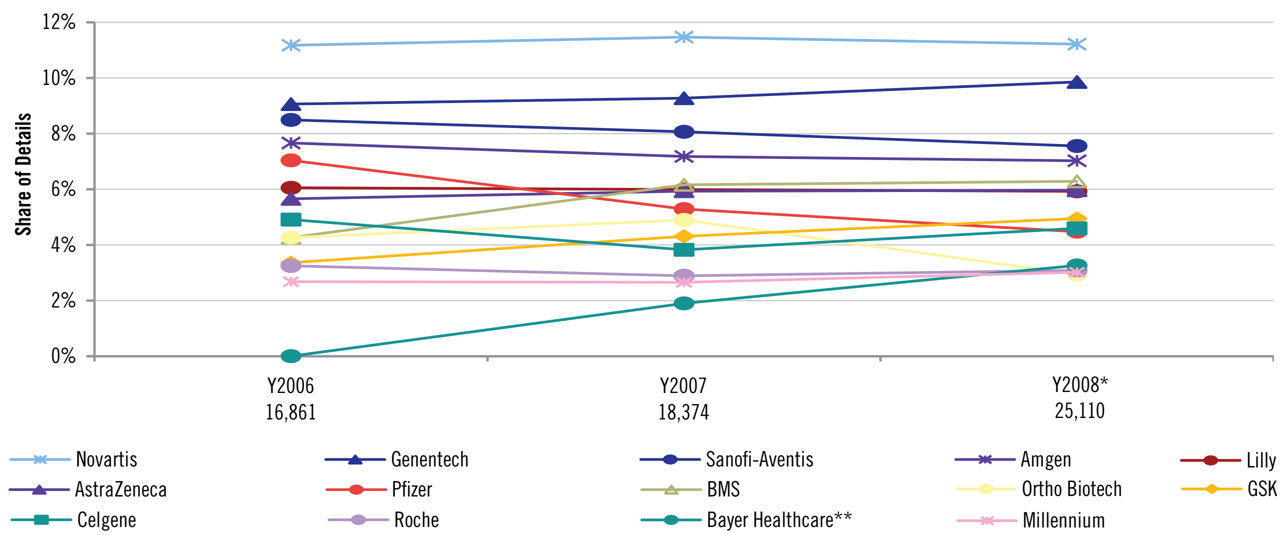
An Outlook on the Pharmaceutical Promotion Landscape Within Oncology

By Lesley Bailey and Jill Walton

As the oncology competitive brand marketplace continues to grow with new product entrants and expanding product labels, offset by industry company consolidation and sales force restructuring, OBR coordinated with ImpactRx to report on a year-end review on the promotional landscape oncologists faced this past year.

Figure 1. Share of Attention – Sales Representative Oncology Product Details (2005–2008)

This chart demonstrates the intense competition to reach oncologists by the major oncology-focused pharmaceutical and biotech companies.



*2008 data is YTD November 2008 **Represents only the activity of the new operating company Bayer Healthcare

- » Novartis & Genentech continued to dominate the oncology sales rep promotion market given their multi-brand portfolios.
- » OrthoBiotech (OBI) had the greatest drop off '07 to '08, partially due to J&J's decision to merge OBI into Centocor.
- » Sanofi-Aventis, Amgen, and Pfizer continued to lose share year over year.
  - Pfizer's decrease can be attributed to a decrease in Camptosar detailing due to patent expiration.
  - Amgen's Nplate approval in late August 2008 could support a rebound in 2009.
- » The new company, Bayer Healthcare (based on Bayer's acquisition of Schering AG/Berlex effective in '07) results in a new player in the Top 15 most detailed companies.
- » Celgene rebounds thanks to the Pharmion acquisition effective March '08.
- » Eli Lilly's acquisition of ImClone could have a similar outcome in '09.
- » BMS benefited from the Ixempra launch late '07 and into '08.
- » GSK's share continued to grow due to the launch of Tykerb in Q2 '07 and the launch of Promacta in Q4 '08 could potentially add to their overall share in 2009.

Figure 2. Top 25 Products Detailed by Sales Representatives (2007 vs. 2008)

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

2007 Rank Jan-Nov	Brand	2008 Rank Jan-Nov	Brand
1	Taxotere	1	Taxotere
2	Abraxane	2	Avastin
3	Avastin	3	Alimta
4	Erbitux	4	Abraxane
5	Aranesp	5	Arimidex
6	Alimta	6	Erbitux
7	Revlimid	7	Velcade
8	Velcade	8	Revlimid
9	Arimidex	9	Femara
10	Femara	10	Xeloda
11	Gleevec	11	Treanda
12	Tykerb	12	Tarceva
13	Torisel	13	Tykerb
14	Rituxan	14	Sutent
15	Gemzar	15	Nplate
16	Procrit	16	Rituxan
17	Xeloda	17	Aranesp
18	Tarceva	18	Ixempra
19	Exjade	19	Herceptin
20	Vectibix	20	Gleevec
21	Sutent	21	Torisel
22	Tasigna	22	Emend
23	Eloxatin	23	Neulasta
24	Ixempra	24	Nexavar
25	Herceptin	25	Eloxatin

- » Taxotere continued to hold the top spot in highest number of details. This is expected given the multiple indications for Taxotere.
- » Avastin increased to the 2nd most detailed product in ‘08, partially due to its new breast indication in February ‘08.
  - An area to watch in the future will be the potential of label expansion for GBM and/or RCC indications.
- » Abraxane maintained a top 5 position in 2007/2008; it will be a brand to watch in ‘09 due to the likelihood of the termination of the co-promote agreement between Abraxis and AstraZeneca.
- » Alimta’s jump to third place can be attributed to expanded sale representative promotion in Q4 due to the label expansion in first-line NSCLC in September.
- » While Erbitux remained steady from ‘07 to ‘08, the impact of the Eli Lilly acquisition and the pending approval for NSCLC remains to be seen.
- » Treanda’s initial approval for CLL in April and NHL in November placed it just short of the top 10 in ‘08, and is indicative of Cephalon’s quick ascent as a key player in the oncology marketplace.
- » Gemzar, Vectibix , Procrit, Tasigna and Exjade all dropped out of the top 25 most detailed products.

2007 Oncologist n=350
2008 Oncologist n=425
Brands highlighted launched during the year.

cont. on pg 46 >>

Figure 3. Oncology Sales Force Top Tier Rating—2008*

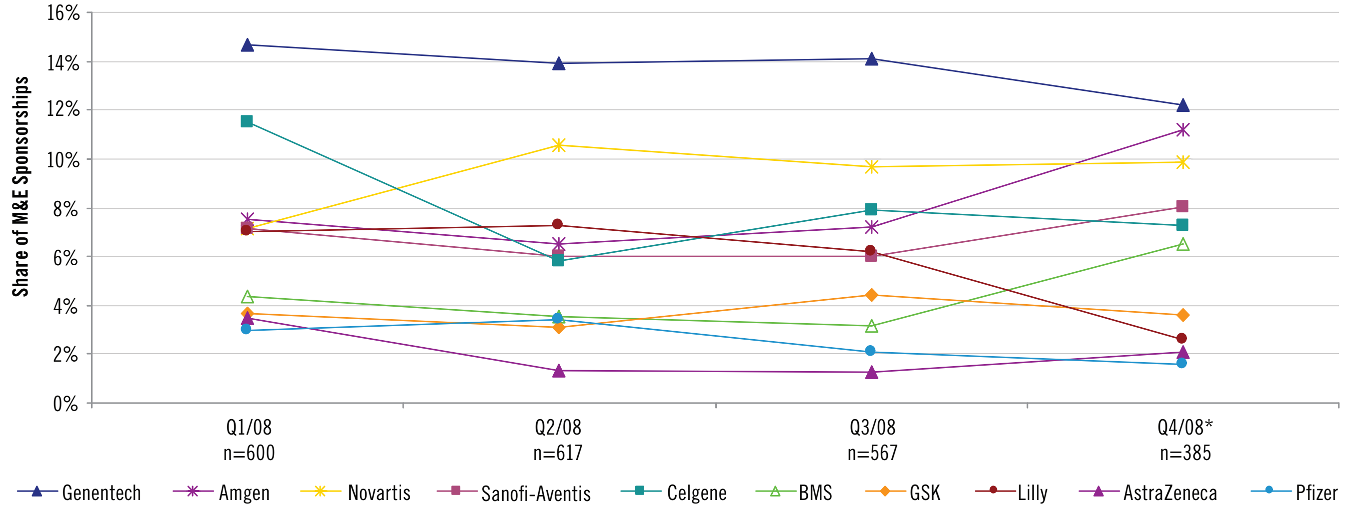
When asked to rate the different company sales representatives they interact with on a daily basis throughout 2008 as "top, middle or bottom tier", Genentech reps rise to the top followed closely by Amgen.

	I Consider Representative Top Tier**
Genentech	59.1%
Amgen	57.0%
Millennium	53.3%
Celgene	53.2%
Novartis	51.7%
Sanofi-Aventis	50.9%
Pfizer	50.7%
Roche	50.7%
AstraZeneca	50.3%
Lilly	50.0%
Ortho Biotech	46.8%
GSK	46.1%
Merck	45.9%
BMS	45.3%
Bayer Healthcare	41.0%

Based on 18,661 responses by 425 oncologists.
*2008 data is YTD November 2008.
**Question is "I consider the Representative to be among the: Top Tier, Middle Tier, Bottom Tier."

Figure 4. Share of Company Sponsored Meeting & Events—2008

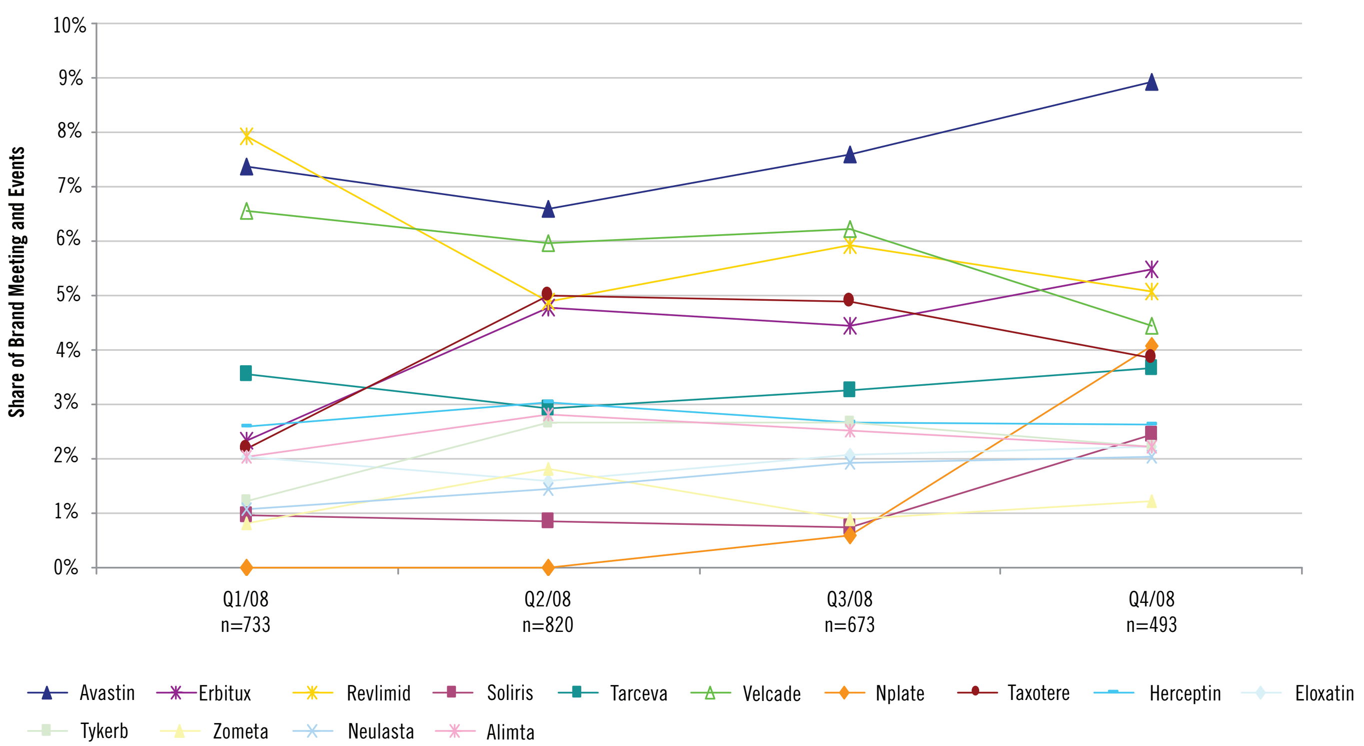
This chart shows the companies with the greatest share of company-sponsored meetings events—an area for future downsizing given the potential impact the new pharmaceutical promotional guidelines will have in 2009. While Genentech had the greatest shares of company-sponsored meetings events, Celgene, Novartis, and Amgen all vied for second place throughout 2008.



*Q4 is aggregate October and November data.
Total will not sum to 100% due to all other under 2% not shown.
Report Definition: (n=number of Meeting and Event sponsorships by a Pharmaceutical/Biotech company)
Note: There can be multiple sponsors for each unique Meeting and Event.

Figure 5. Share of Brand Specific Meeting & Events—2008

This chart shows the brands with the greatest share of meetings and events, and gives insight into where companies with multiple brand portfolios are focusing their efforts. In comparison to the company level view, Avastin, Revlimid and Velcade had the greatest shares of brand level meetings and events throughout 2008. Nplate and Soliris had the greatest share increase from Q3 to Q4*.



Total will not sum to 100% due to all other under 1% not shown.

*Q4 is aggregate October and November data.
Report Definition: (n=number of brand specific meeting and events)

About the Contributors of this Data

ImpactRx specializes in measuring pharmaceutical and biotech industry sales and marketing effectiveness in physicians' offices. Within the proprietary ImpactRx system, they have a longitudinal network of 420+ oncologists who use Personal Digital Assistants (PDAs) 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 are a compilation of information collected only from the sales representative detailing and meeting and event activity during the noted timeframes.

>>OBR DAILY NEWS FLASH

Cancer clinical trials on OBR's 2009 watch list: Genentech's Phase 3 data of Avastin® in adjuvant colon cancer, Onyx's Phase 3 data of Nexavar® in melanoma, and Poniard's picoplatin Phase 3 data in small-cell lung cancer--all due in mid-2009; and Synta's Phase 3 trial of elesclomol in melanoma in the first quarter. *(TheStreet.com, 12/18/08)*