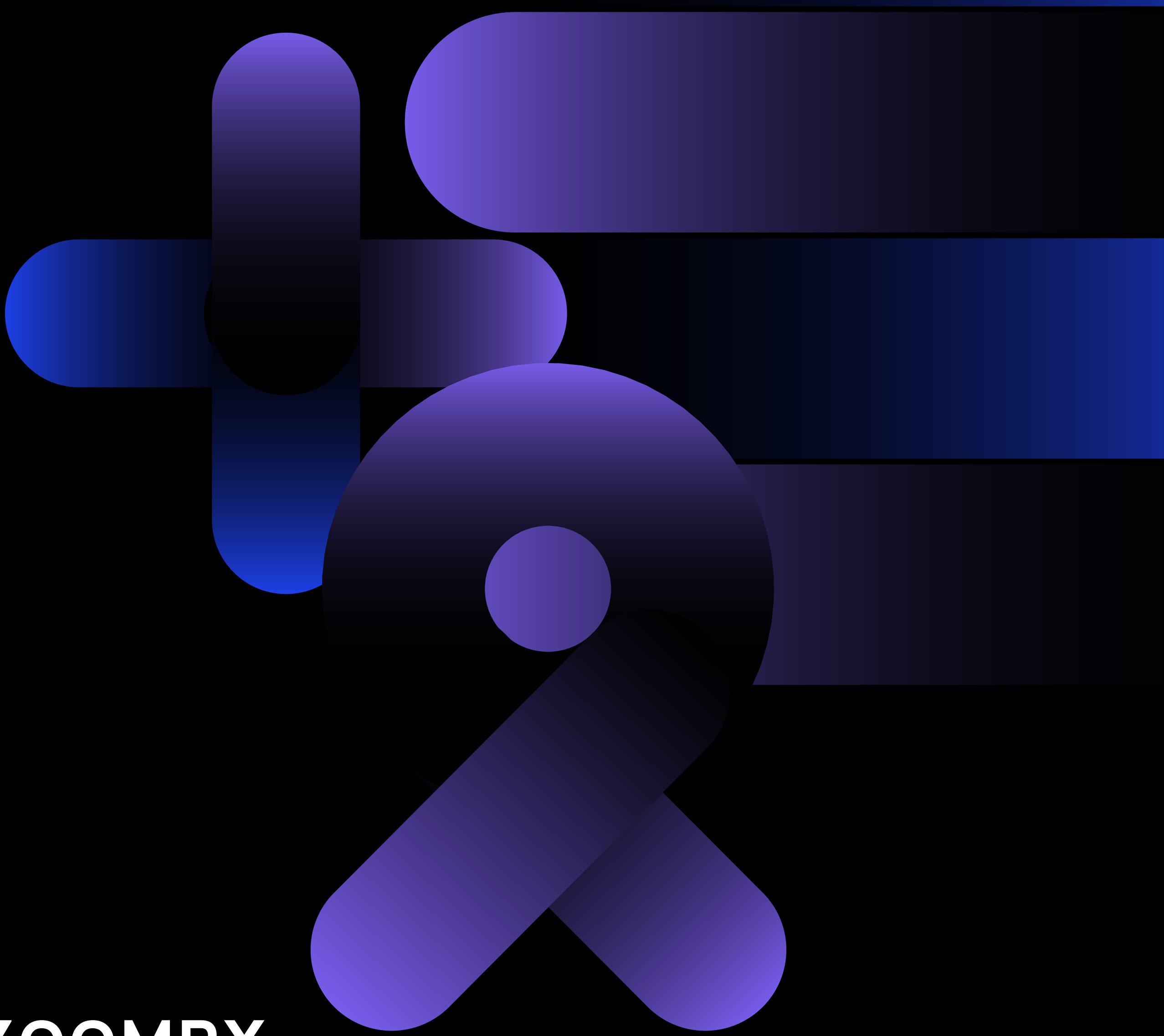


ZOOMRX

Global Pharma Manufacturer Perception Tracker

Oncology

2024

Introduction

Every day, over 54,500 people are diagnosed with cancer—and more than 26,000 succumb. Pharma leaders are answering the call by increasing investments in cancer drug research and developing personalized treatments, along with early screening and early-stage drug interventions in curative settings. These range from small molecule targeted agents, immunotherapies, and antibody-drug conjugates (ADCs) to cell and gene therapies. In the past decade, over 100 new molecular entities have been approved by the FDA; unsurprisingly, today competition is fierce.

That puts renewed focus on oncologists. Oncologists are the key decision makers in oncology therapies; with therapeutic choices evolving rapidly, oncologists need to absorb lots of new information as they face increasingly complex decisions. A positive perception of, and relationship with, the manufacturer plays an important role in decision making. Thus, understanding oncologists' perceptions is crucial for manufacturers to gauge their standing on various aspects of their relationships with oncologists and identify areas for improvement.

ZoomRx identifies manufacturers' strengths, areas for improvement, and opportunities for deeper collaboration with the healthcare community, by combining HCPs' ranking of oncology manufacturers, their pipeline, and their promoter scores.

> *Oncologists are the key decision makers in oncology therapies.... A positive perception of, and relationship with, the manufacturer is a key driver of long-term prescribing behavior.*

Top 5 Global Leaders

IN THE ONCOLOGY SPACE

1

AstraZeneca is the ***leader*** in oncology's tightly fought race to the top

AstraZeneca has solidified its leadership in oncology by developing a diverse drug portfolio centered on a single-minded goal to transform cancer survival by providing early treatment options and combating metastatic and resistant diseases.

PORTFOLIO

Over the past 12 months, AstraZeneca has expanded into new cancer types, with key approvals such as Truqap, Enhertu (tumor agnostic), Tagrisso (inoperable Stage III NSCLC), and Imfinzi (biliary tract and endometrial cancers). AstraZeneca also showcased breakthrough Phase 3 data (including Dato-DXd's) at ASCO and ESMO 2024, cementing its position as an innovator in oncology.

Strategically, AstraZeneca's 2024 acquisitions underscore its commitment to tackling cancer from multiple angles, enhancing its cell therapy pipeline, advancing radioconjugate and gene-editing, and boosting its manufacturing capabilities. These moves demonstrate AstraZeneca's ambition to deliver at least 20 NMEs by 2030.

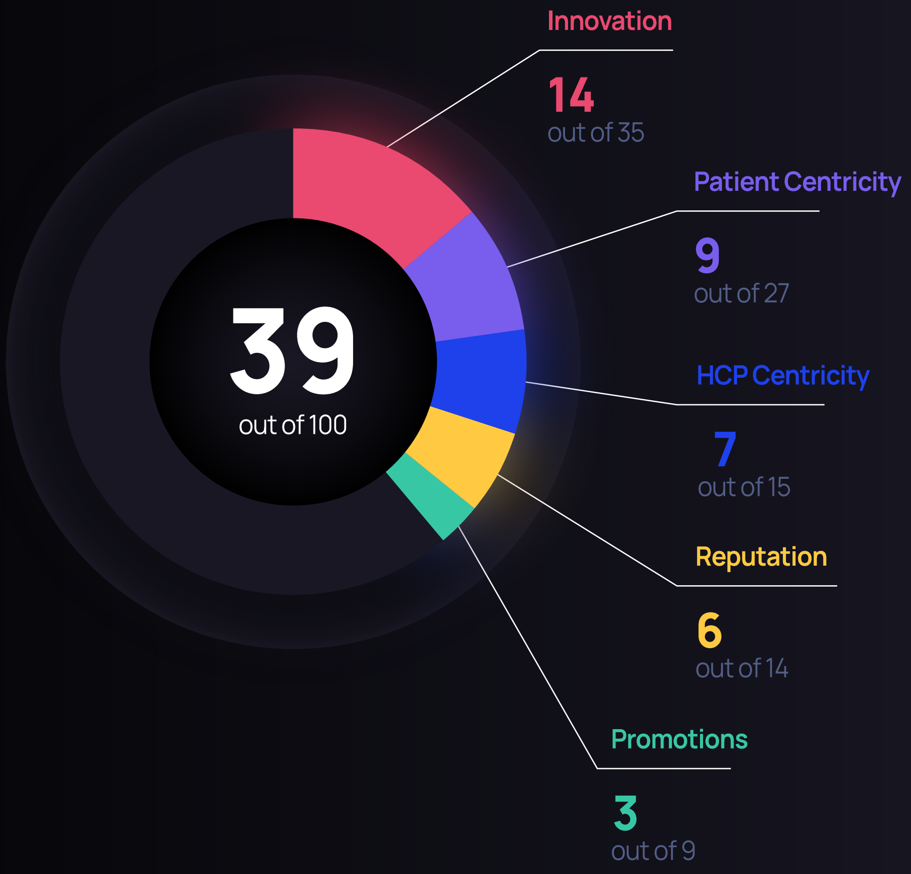
PERCEPTION

Despite its global leadership, AstraZeneca faces intense competition from Roche, which has higher reputation scores outside of the U.S., particularly in the UK and Germany. This advantage is largely due to Roche's established market presence and expansive oncology portfolio.

BOTTOM LINE

AstraZeneca's portfolio expansion and recent acquisitions highlight its drive to strengthen its position. However, to maintain its leadership, AstraZeneca must also focus on patient-centricity and reputation. The competition is close behind.

#1 PERCEPTION SCORE
ASTRAZENECA



PERCEPTION RANK ACROSS GEOGRAPHIES

US	1	39
UK	2	35
France	1	40
Germany	6	27
Spain	1	52
Italy	1	39

> *At the forefront of numerous therapies that have revolutionized the treatment of cancers such as immunotherapy (durvalumab) and targeted therapies such as osimertinib.*

> *They are very involved with the medical team in the practical field, and follow all the details regarding safety, dosing and indications. They have a big team of oncologists, MSLs and medical directors and medical monitors that makes communication very easy.*

Roche & BMS vie for the *second place*

Roche and BMS follow closely on AstraZeneca’s heels. Each has its own strengths; each has a global blockbuster product; each is eager to move into first place.

2

PORTFOLIO

Roche has a long history of oncology leadership, backed by a strong drug portfolio and pipeline—a combination of past, present, and future strengths. Its portfolio including drugs like Tecentriq, Alecensa, Phesgo, and Venclexta is expected to drive growth in the near-to-mid-term. In 2024, Roche expanded Alecensa's indications in both the U.S. and EU and gained approval for Itovebi in breast cancer. Additionally, Roche has two new molecules for non-small cell lung cancer (NSCLC) with key data expected by late 2024 or early 2025.

Roche has also strengthened its pipeline through partnerships with firms like MediLink Therapeurics (for ADCs in solid tumor), Orionis Biosciences & Monte Rosa therapeutics (for molecular glue degraders).

PERCEPTION

While Roche is competitive in Europe, it lags other manufacturers like Bristol Myers Squibb, Merck, and Pfizer among HCPs in the U.S. In fact, Roche's net promoter score (NPS) dropped from 28 to 16, and it falls slightly short in other perception dimensions, particularly innovation and HCP-centricity.

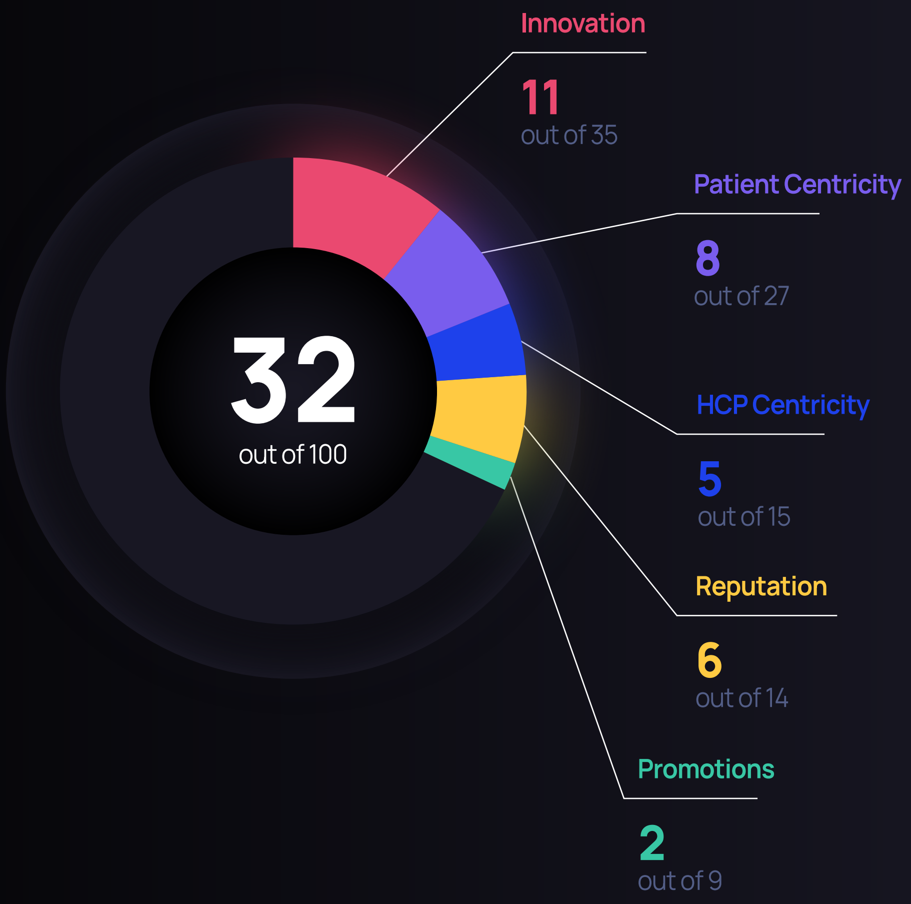
BOTTOM LINE

To better compete with AstraZeneca, Roche needs a newer oncology drug to enhance its perception. While patient-centric innovations like Tecentriq Hybreza, the first subcutaneous anti-PD-L1 immunotherapy, are positive steps, more such innovation & strategic engagement with HCPs are crucial to improving its standing across the globe.

2

PERCEPTION SCORE

ROCHE



PERCEPTION RANK ACROSS GEOGRAPHIES

6	US	20
1	UK	45
2	France	35
2	Germany	32
2	Spain	43
2	Italy	37

> *Roche has developed several breakthrough drugs with more efficacy and lesser side effects. They are continuously working on advanced research and new treatments. Also, they cover broad range of types of cancer. Their treatments are widely available all-round the globe so making it beneficial for patients.*

3

Bristol Myers Squibb™

PORTFOLIO

BMS has a well-rounded portfolio of drugs in Opdivo, Yervoy, Revlimid, Pomalyst and more. In the past year, BMS has gained key approvals from both the FDA and EMA for Augtyro, and Krazati. BMS has also submitted several indication expansions for Opdivo with the tentative approval date for subcutaneous Opdivo set for December 2024. This comes in direct competition with Roche's subcutaneous immune-oncology (IO) therapy, Tecentriq Hybreza, the first ever subQ IO, which was approved in September 2024.

BMS has been active in acquisitions including its purchase of Mirati, and its addition of a differentiated actinium-based radiopharma platform. It has also partnered with SystImmune to develop and commercialize a bispecific for metastatic NSCLC.

PERCEPTION

Globally, BMS trails Roche in smallest of margins in terms of reputation, largely due to Roche's well-established oncology portfolio. However, BMS's current pipeline is rated better than Roche's. Overall, BMS leads in the U.S. and Germany, although it falls short in other major EU markets.

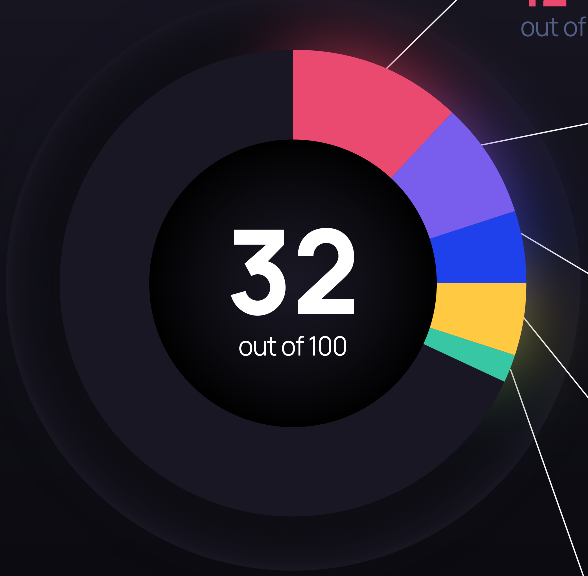
BOTTOM LINE

While BMS's oncology strategy has focused on expanding and diversifying beyond IO, it must strengthen its presence across Europe to surpass Roche and AstraZeneca. Recent EMA submissions help, but boosting its reputation will require better patient support and deeper HCP engagement.

> *Because they have a lot of research and a lot of work with immunotherapy, especially Opdivo.*

3

PERCEPTION SCORE
BMS



Innovation
12
out of 35

Patient Centricity
8
out of 27

HCP Centricity
5
out of 15

Reputation
5
out of 14

Promotions
2
out of 9

PERCEPTION RANK ACROSS GEOGRAPHIES

2	US	37
5	UK	22
4	France	30
1	Germany	41
3	Spain	28
5	Italy	23

> *Active in oncology for decades, always with decisive innovations, competent pharmaceutical representatives, good studies.*

Merck, Pfizer & Novartis *seem similar,* but are not

Although Merck, Pfizer and Novartis have similar rankings, there is a stark difference in how they are perceived across regions. Still, each has distinct strengths, making them equally strong players on a global scale.

MSD

4

PORTFOLIO

Merck's oncology portfolio rests primarily on one blockbuster drug: Keytruda. Merck has been capitalizing by harnessing Keytruda's power through numerous indication expansions. Despite multiple collaborations with leading firms on drugs like opevesostat for prostate cancer and patritumab deruxtecan for pretreated EGFR+ NSCLC, Merck's new molecular pipeline lacks a highly anticipated drug. Moreover, it has suffered setbacks, such as patritumab deruxtecan receiving a CRL from the FDA.

PERCEPTION

Powered by Keytruda, Merck's reputation score is consistently higher than Novartis and Pfizer across most geographies—and is even higher than AstraZeneca in the U.S. However, relying on Keytruda alone is not enough for Merck to secure a top 3 global position. The company lags on other key perception metrics such as innovation and promotions.

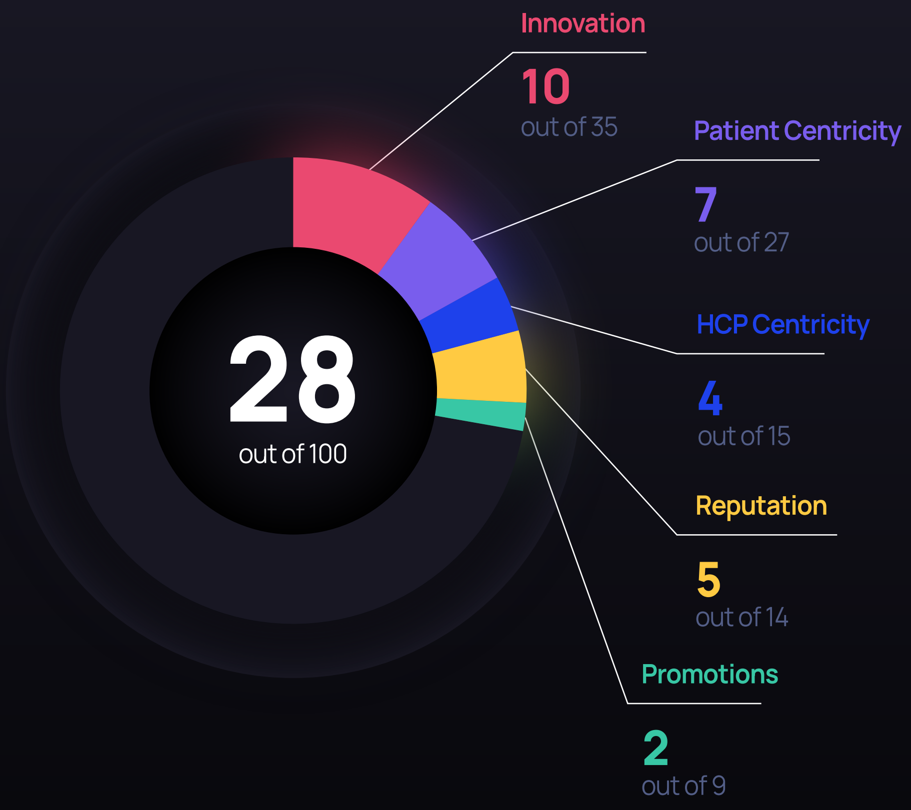
BOTTOM LINE

Merck needs to make a stronger attempt to pivot away from its 2021 oncology strategy of using Keytruda as a foundation for pipeline growth and diversification. With an approaching patent cliff for Keytruda in 2028, the need for a stronger pipeline /portfolio is crucial. Setbacks like patritumab deruxtecan's FDA CRL and Summit Therapeutic's Ivonescimab showing superior results to Keytruda in 1L advanced NSCLC at conferences are also not helping their cause. To strengthen its standing, Merck needs expanding its portfolio, enhancing patient support programs, and delivering more value to HCPs through impactful promotions, which have proven successful in the past.

> *Their creation of Keytruda has been life changing for many patients and I anticipate that they will continue to make new drugs.*

4

PERCEPTION SCORE
MSD



PERCEPTION RANK ACROSS GEOGRAPHIES

US	3	37
UK	6	21
France	7	16
Germany	4	29
Spain	5	23
Italy	6	19

> *The manufacturer clearly has leadership in the area of immuno-oncology and has continued to play an important role in this field with multiple PARP lines available and the company has an excellent reputation.*

5

PORTFOLIO

Pfizer has made significant strides expanding its portfolio; the acquisition of Seagen alone has doubled its late stage oncology pipeline. The company has achieved notable successes, including FDA approval for Tivdak, EMA approval for Talzenna and Xtandi, and positive data for Padcev, Braftovi, and Mektovi, along with positive phase 3 readouts for Lorbrena, Adcetris, and HD21 studies.

PERCEPTION

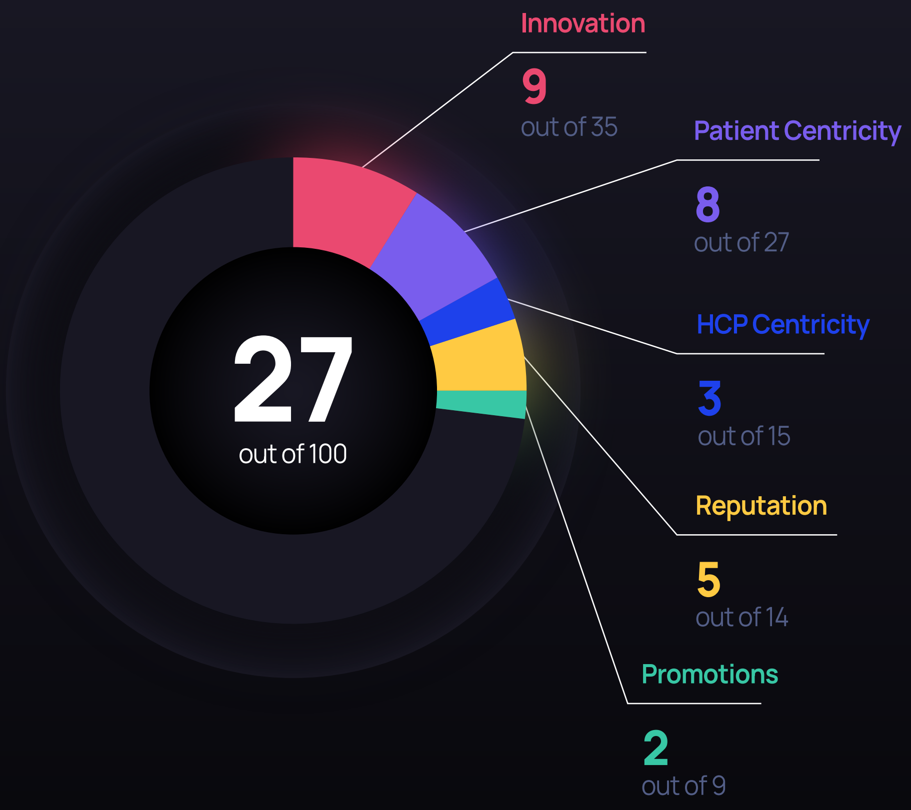
Compared to Novartis and Merck, Pfizer holds an advantage in the U.S. market, bolstered by stronger innovation and reputation scores. However, it falls short in HCP-centricity globally, including in the U.S., despite outperforming Novartis in other metrics.

BOTTOM LINE

To solidify its stated goal of achieving world-class oncology leadership, Pfizer must improve its perception in the EU region. This requires not only a focus on innovation but also a commitment to enhancing patient- and HCP-centric strategies. Pfizer's recent presentation at ESMO, covering an oncology portfolio of over 10 approved and investigational oral and mini-oral therapies, is a step in the right direction.

5

PERCEPTION SCORE
PFIZER



PERCEPTION RANK ACROSS GEOGRAPHIES

4	US	28
4	UK	26
3	France	32
5	Germany	27
7	Spain	22
4	Italy	25

> *Has revolutionized the field of oncology and haematology with its innovative drugs that positively impact patient survival and with good tolerance and manageable side effects.*

6

NOVARTIS

PORTFOLIO

Novartis has made strides in the U.S. market, with growing sales for its oncology drugs, Kisqali and Pluvicto. The company is working on supplementary indications for several of its existing oncology products, including Lutathera (limited to the EU), Pluvicto, Scemblix, and Rydapt, which are expected to be released in the near future. But currently, Novartis has only one new molecule submission, ianalumab for Immune Thrombocytopenia, expected to be approved in 2026.

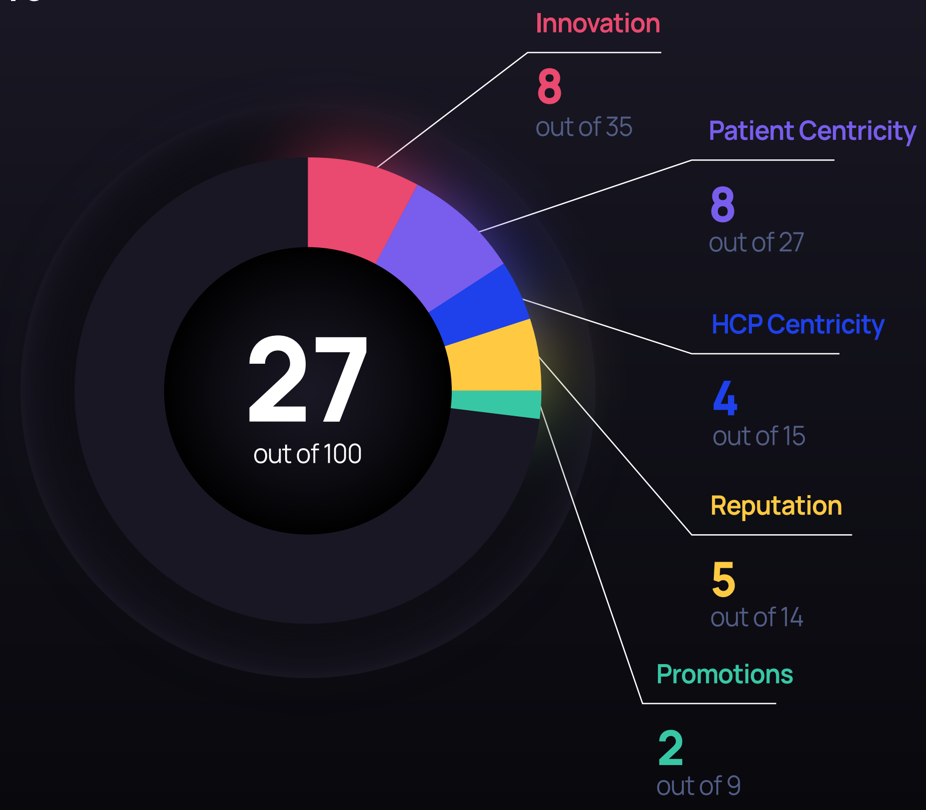
PERCEPTION

Among Merck, Pfizer and Novartis, Switzerland-based Novartis leads in most EU regions, with superior scores in patient-centricity and HCP-centricity. However, in the U.S. it lags competitors.

BOTTOM LINE

Novartis is actively working towards future growth. The company has announced plans to increase promotional efforts in US for Pluvicto and with Kisqali's recent approval for early breast cancer, nearly 7,000 US HCPs now prescribe the brand, reflecting a strong guideline position. However, the company's lack of new therapies could hinder its ability to compete with Pfizer's more robust and innovative pipeline.

6 PERCEPTION SCORE
NOVARTIS



PERCEPTION RANK ACROSS GEOGRAPHIES

US	UK	France	Germany	Spain	Italy
23	31	21	32	25	33
5	3	5	3	4	3

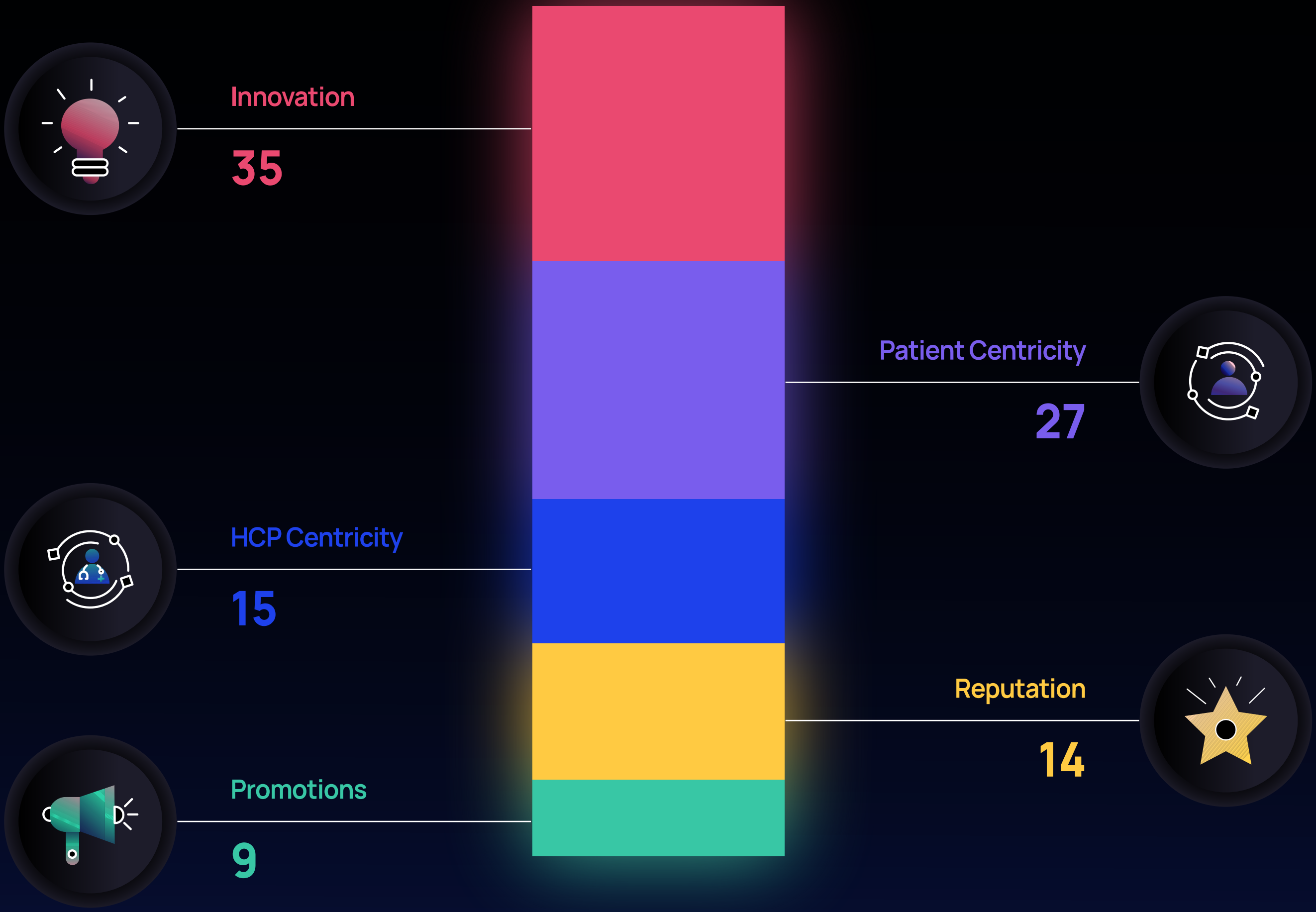
> *Innovation, well-constructed studies from a statistical point of view and centered on patient care. Respect for the patient and the healthcare professionals involved in the treatment.*

What *sways* the mind of HCPs?

With HCPs' prescribing decisions as the driver for pharmaceutical uptake, it is crucial to understand not only which attributes they rank as most important—and which they actually weight most heavily.

When we asked physicians which factors most influenced their perception of a manufacturer, they consistently ranked innovation and patient-centricity as the top priorities, with innovation corelating with the product portfolio. Reputation and HCP-centricity follow, with promotional efforts being the least important.

HCP'S STATED IMPORTANCE



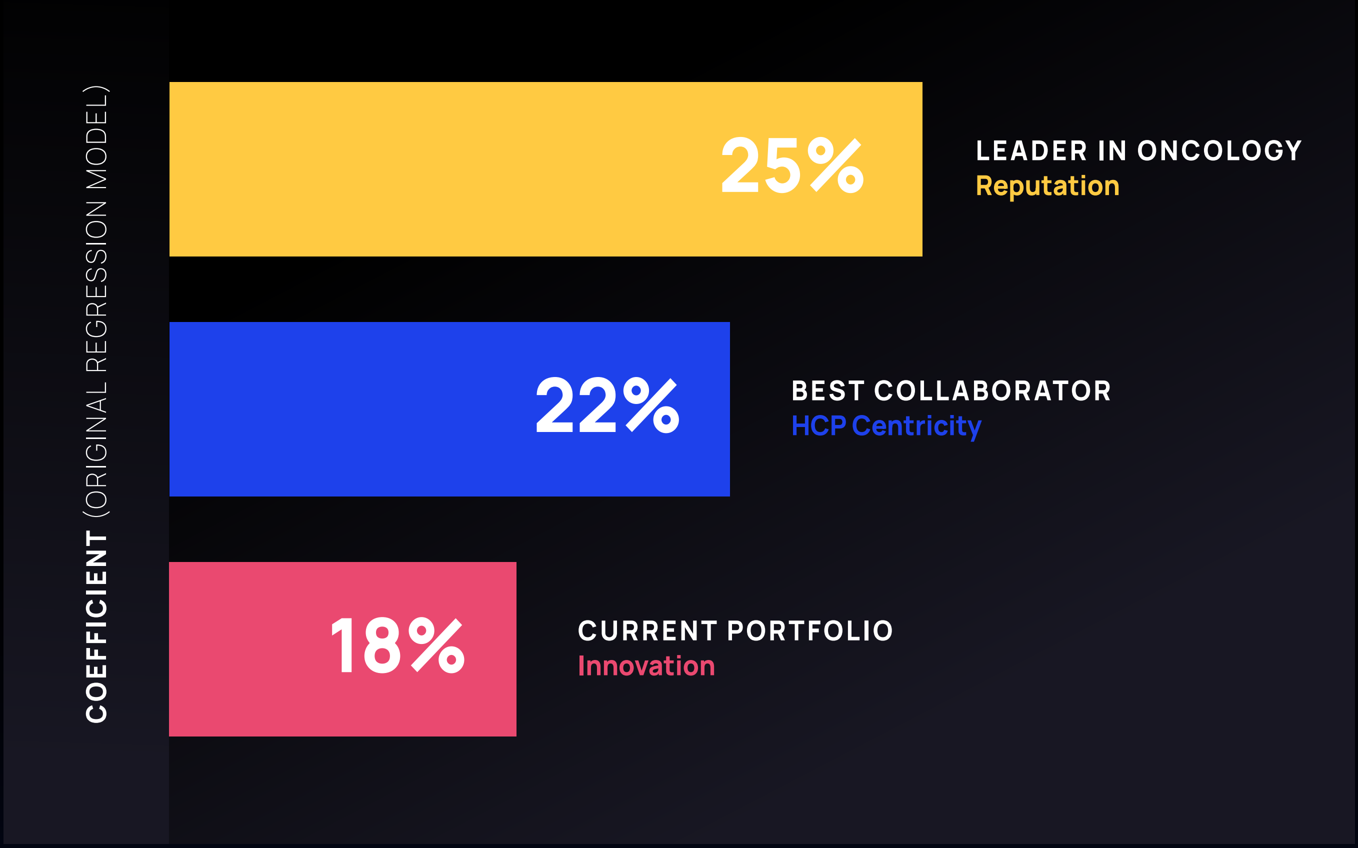
Yet, when we analyzed what truly impacted a physician's NPS score, the story shifted. Reputation rose to the fore, with HCP-centricity and innovation as the second and third strongest drivers.

Oncology drug manufacturers will be wise to pay as close attention to HCPs as to their reputations and their pipelines.

Upon further investigation, we found that for leaders to maintain and strengthen their positions, they must prioritize the following:

- Being perceived as the leading authority in oncology
- Collaborating effectively with HCPs
- Enhancing the quality of rep interactions

IMPACT OF ATTRIBUTE ON NPS



What to *focus* on the coming Year?

The battleground of oncology is expected to get fiercer in 2025. To win the perception battle, manufacturers need to focus expanding on their innovative portfolio with transformative clinical results and craft educational programs to empower patients and healthcare providers with knowledge. Effective collaboration with HCPs & their practice through enhanced rep interaction quality will help boost HCP perceptions in medium to long term.

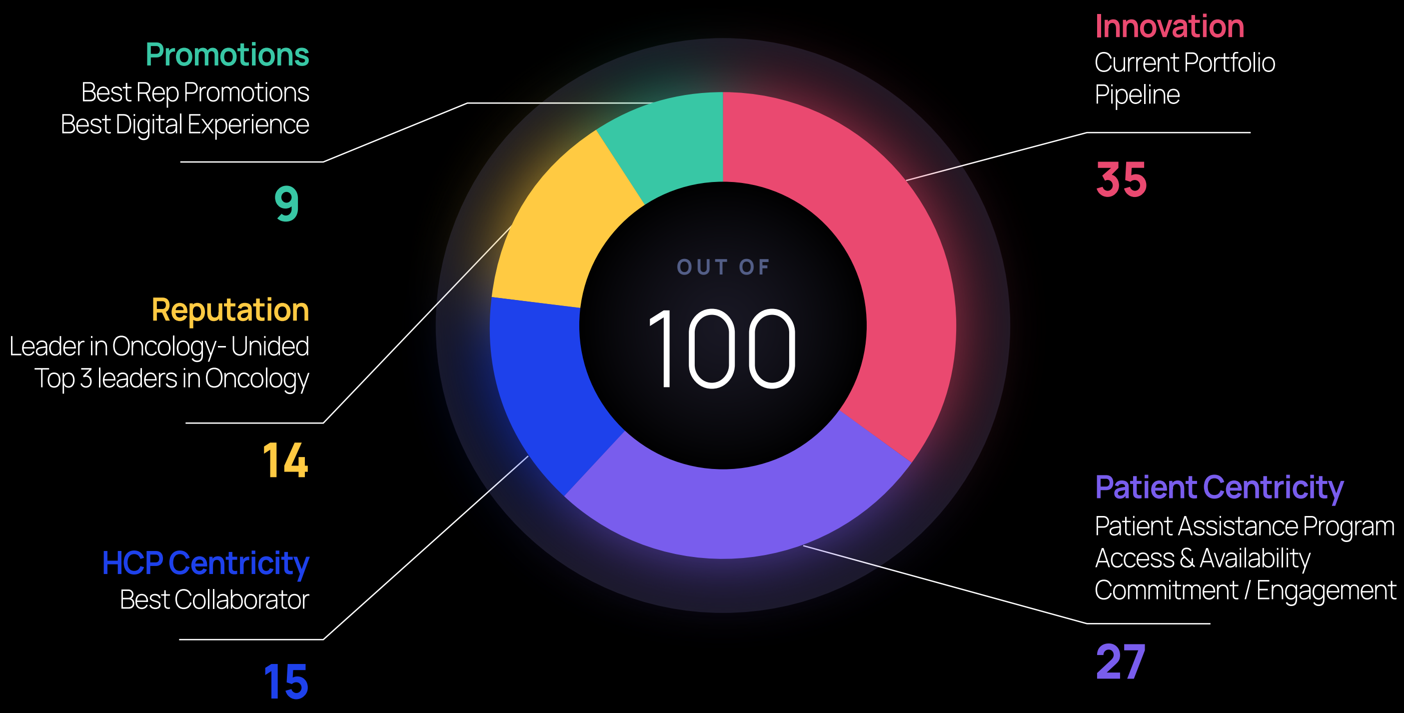
Methodology

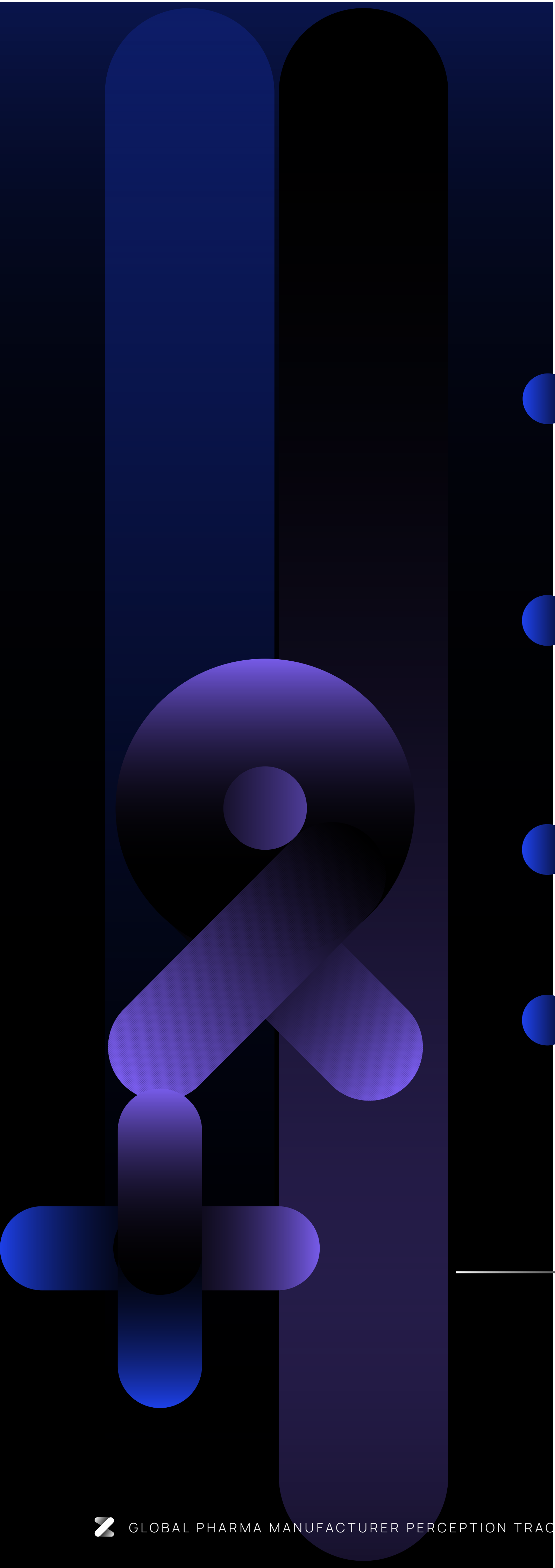
To gain a comprehensive understanding of HCP's perception of leaders in the vaccine space, ZoomRx conducted a quant-qual survey with more than 300 HCPs across 6 countries, including the United States, the United Kingdom, Germany, France, Spain, and Italy.

At ZoomRx, we believe that perception is shaped by both current and future viewpoints, as well as interactions with various touchpoints. We assessed HCP's perception of each manufacturer across five dimensions, including:

- **Innovation**
- **Patient Centricity**
- **Reputation**
- **HCP Centricity**
- **Promotions**

By computing a score on a scale of 1 to 100 across these dimensions and applying weightage to each country based on its population-to-survey sample composition, we then ranked each manufacturer.





ZoomRx's annual Global Pharma Manufacturer Perception Report paints a comprehensive picture, detailing the ways HCPs view leading oncology manufacturers. The full report answers key questions such as:

- Which manufacturers do HCPS see as the market leader?
- Which manufacturers have the most innovative and effective portfolios?
- Which manufacturers stand out for promotional quality?
- What can be done to enhance leadership perceptions?

FOR MORE INFORMATION,
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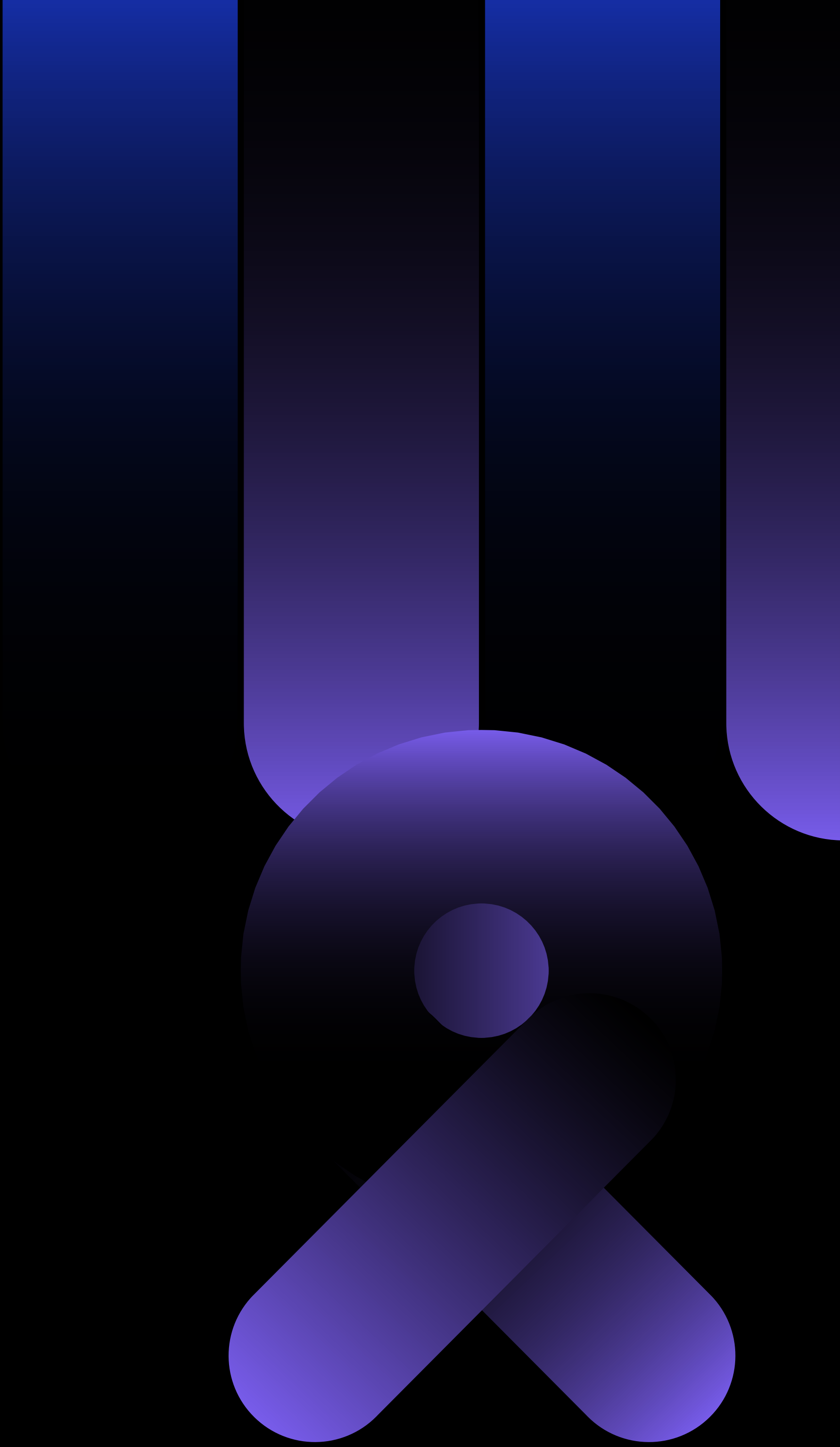

ZOOMRX

ABOUT ZOOMRX

ZoomRx is a global life science consulting firm. We provide strategic value across the product life cycle. Over 100 of the world's leading life science companies trust our approach, counting on insights from ZoomRx to guide their product strategies.

ABOUT ZOOMRX'S TRACKERS

Customized **ZoomRx Trackers** provide the “so what” and “now what” for a brand, tailoring studies to meet specific brand needs, then weaving together actionable insights.

From promotional tracking to brand performance and chart audits, both pre- and post-launch, our global studies offer strategic recommendations that drive informed decisions and optimize brand performance.