

Manufacturer Perception Report

Q1 2023



ZoomRx Tracks Manufacturer Perceptions Among Leaders Across 5 Therapeutic Areas in 6 Dimensions Every Quarter

THERAPEUTIC AREAS



ONCOLOGY



IMMUNOLOGY



CARDIOVASCULAR



NEUROSCIENCE



VACCINES

DIMENSIONS



PERCEPTUAL LEADERSHIP



PORTFOLIO OF INNOVATIVE MEDICINES



PATIENT ACCESS TO HEALTH



SALES REP AND THEIR INTERACTIONS



MSL INTERACTIONS



INNOVATIVE NON-PERSONAL PROMOTIONS



RESPONDENT OVERVIEW

MDS INTERVIEWED



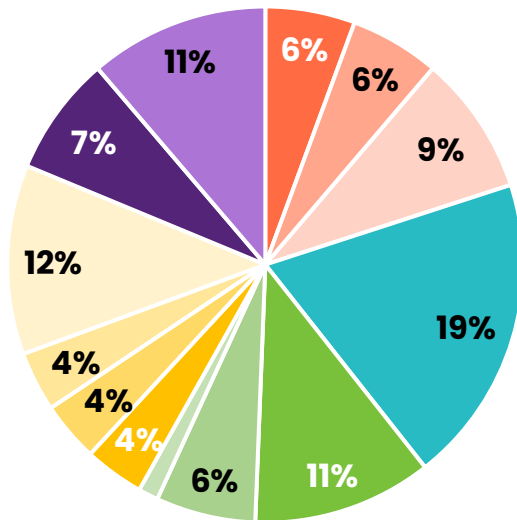
160

FIELDING PERIOD



Mar 2023

PRIMARY MEDICAL SPECIALTY
% of MDs



- Family Practice
- Internal Medicine
- PEDs
- Neurology
- Clinical cardiology
- IC
- EC
- Immunology/Allergy
- Rheumatology
- Dermatology
- Gastroenterology
- MedOncs
- HemOncs

AVERAGE YEARS OF PRACTICE



14 years

EXECUTIVE SUMMARY: PERCEPTION TRACKER

LEADERS

- **Pfizer** shines in overall HCP perception across five therapeutic areas, contributing to its \$100B revenue in 2022.
- **AbbVie** dominates in Immunology, with flagship products Humira, Rinvoq, and Skyrizi driving strong perceptions.
- **Biogen** stands out as the leader in neurological treatments, tackling ALS, Alzheimer's, and MS with innovative solutions.

KEY CHALLENGERS

- **AstraZeneca's** ranks second among oncologists and cardiologists, boasting a growing pipeline and strategic acquisitions.
- **Merck's** robust oncology and vaccine portfolio places it as a notable challenger to Pfizer in these areas.
- **Novartis** excels in neurological treatments, ranking second among neurologists and earning positive cardiologist perceptions for their CV portfolio.
- **Janssen** with presence across therapeutic areas has a podium finish only in immunology. As a challenger, they have opportunities to improve their perceptions among the HCPs
- **Sanofi** with a focus on immunology and vaccines space, finishes within the top 5 places in both areas.

PERCEPTION DRIVERS

- Manufacturers offering *diverse, innovative, and effective* treatments for challenging conditions receive high perceptions.
- *Concise, informative, and relevant* communication regarding products, clinical trials, and treatment options from manufacturers are perceived well

PERCEPTION LEADER BOARD: Q1'23

THERAPEUTIC AREAS	RANK 1	RANK 2	RANK 3
 ONCOLOGY			
 IMMUNOLOGY			
 CARDIOVASCULAR			
 NEUROSCIENCE			
 VACCINES			

*Overall rank is calculated based on the geometric mean of % of HCPs ranking company in the top 3 across attributes

Factors Associated with the Leaders

Oncology



"Because of the **outstanding products** that they have, the way the medications have helped oncology patients has made them a leader, also the **support programs** that are offered. "



"You know, honestly, I think **all these companies are really good, but AstraZeneca I think strives to achieve excellence** and does provide quite a bit of **breakthrough medications** and things like that, I believe **it can change the landscape of Oncology.** "



"**Very responsive representatives** that go out of their way to help patients and providers."

Immunology

abbvie

"Not only does AbbVie have a **diverse, efficacious product portfolio**, but its **business team ensures widespread access** to its drugs."

abbvie

"This company is at the **forefront of development of immunologic therapy, biologic therapy.** They are working on **new medications**, have **excellent clinical trials**, and they're certainly one of the **biggest leaders.**"



"**Robust studies** looking at medications that **target specific inflammatory pathways.**"

Cardiovascular



"Pfizer has some very **creative ads** and other materials that help to **increase awareness about their products** and while they may **add value for eligible patients** for their therapies."



"Novartis has a **broad portfolio** of Cardiovascular therapies covering multiple different disease states and is also **developing a pipeline** of therapies **that may change our treatment approach** to patients in particular without the risk of Cardiovascular disease."



"**New innovations** in drug therapy, including **factor 11 inhibitors.**"

Neurology



"They have a **wide array of products** for multiple neurological conditions. They have **excellent sales representatives**, and **good patient support programs.** They are **innovative.**"



"Novartis has a **lot of Neurological drugs** and they seem to be one of the first or second to come out with **new-generation drugs for MS** as well as other conditions such as **migraine.**"



"Their reps are **very professional and skilled. Do not take up too much of my time** and have been with their company for a long time."

Vaccines



"Pfizer, apart from **making COVID vaccine** (in collaboration with BionTech), they are also **involved in coming up with vaccines for some important infections** such as RSV, an important cause of morbidity and mortality in young children."



"**Multiple vaccines**, multiple **researches**, multiple guidance available online and **education through email and liaison.** **Preference from the medical community** in the conferences and leadership groups."



"They have a **wide variety of pediatric vaccines**, and do an **excellent job** with their **detailing** of products, **support** to physicians, and **innovation** for ongoing new vaccines, such as Vaxelis."



Pfizer and AstraZeneca lead perception in the Oncology space; Merck and Novartis follow closely

		Leader in Oncology	Portfolio of Innovative Therapies	Focus on Patients' Access to Health	Best In Class Sales Reps And Interactions	Most Innovative Ads / Non-personal Promotions	Best In Class MSL interactions
01		53%	57%	57%	40%	60%	40%
02		53%	43%	50%	50%	50%	53%
03		43%	33%	47%	43%	37%	43%
04		40%	37%	37%	27%	37%	40%
05		40%	40%	30%	33%	37%	33%
06		27%	37%	27%	37%	23%	30%
07		17%	23%	47%	27%	43%	20%
08		10%	17%	13%	20%	13%	17%
09		17%	13%	10%	13%	13%	13%
10		10%	17%	13%	27%	7%	10%
11		0%	10%	7%	7%	7%	7%

% of HCPs (Ranked COMPANY in Top 3)

*Overall rank is calculated based on the geometric mean of % of HCPs ranking company in the top 3 across attributes



AbbVie dominates the immunology space with Pfizer, Janssen, Sanofi and Amgen trailing behind

		Leader in Immunology	Portfolio of Innovative Therapies	Focus on Patients' Access to Health	Best In Class Sales Reps And Interactions	Most Innovative Ads / Non-personal Promotions	Best In Class MSL interactions
01		79%	78%	70%	78%	73%	71%
02		39%	38%	43%	25%	43%	35%
03		34%	32%	32%	36%	27%	38%
04		39%	32%	27%	28%	33%	24%
05		32%	30%	27%	31%	27%	35%
06		18%	22%	30%	22%	37%	26%
07		18%	24%	22%	25%	27%	24%
08		24%	22%	19%	33%	13%	24%
09		18%	22%	19%	19%	13%	24%
10		0%	0%	5%	3%	7%	3%

% of HCPs (Ranked COMPANY in Top 3)

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Pfizer, AstraZeneca top the list across most attributes; Novartis lags perceptions about portfolio and focus on patient access

		Leader in <u>CVS</u>	Portfolio of Innovative Therapies	Focus on Patients' Access to Health	Best In Class Sales Reps And Interactions	Most Innovative Ads / Non-personal Promotions	Best In Class MSL interactions	
01	↑	Pfizer	63%	43%	60%	37%	47%	53%
02	↑	AstraZeneca	40%	43%	40%	40%	43%	40%
03	↓	NOVARTIS	53%	30%	27%	43%	33%	37%
04	=	Bristol Myers Squibb	33%	30%	27%	40%	30%	43%
05		Janssen	13%	37%	43%	47%	40%	27%
06	↑	MERCK	17%	33%	27%	30%	27%	30%
07	↑	SANOFI	37%	33%	23%	13%	33%	23%
08	=	Lilly	17%	20%	17%	23%	23%	23%
09	↑	BAYER	13%	20%	23%	10%	13%	10%
10		Takeda	13%	10%	13%	17%	10%	13%

% of HCPs (Ranked COMPANY in Top 3)

↑ ↓ = denote increase/decrease/no change from Q4 '22 to Q1 '23 *Overall rank is calculated based on the geometric mean of % of HCPs ranking company in the top 3 across attributes



Biogen and Novartis Lead the Way in Perception Attributes, Outperforming Competitors

		Leader in Neurology	Portfolio of Innovative Therapies	Focus on Patients' Access to Health	Best In Class Sales Reps And Interactions	Most Innovative Ads / Non-personal Promotions	Best In Class MSL interactions
01		61%	58%	58%	61%	39%	52%
02	=	65%	55%	45%	48%	58%	48%
03	↑	45%	52%	35%	45%	48%	42%
04		26%	39%	45%	42%	48%	39%
05	↑	26%	29%	45%	29%	45%	35%
06		29%	35%	39%	39%	19%	32%
07		13%	13%	13%	19%	19%	16%
08		10%	6%	6%	6%	16%	13%
09	↑	13%	10%	3%	3%	6%	19%
10		13%	3%	10%	6%	0%	3%

% of HCPs (Ranked COMPANY in Top 3)

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Pfizer tops the list, while Sanofi is perceived a vaccine “leader”, it loses to others across the individual attributes

		Leader in Vaccines	Portfolio of Innovative Therapies	Focus on Patients' Access to Health	Best In Class Sales Reps And Interactions	Most Innovative Ads / Non-personal Promotions	Best In Class MSL interactions	
01	=		70%	80%	63%	67%	53%	60%
02	↑		47%	40%	50%	57%	53%	63%
03	↓		50%	40%	43%	60%	37%	47%
04	↑		33%	50%	37%	30%	47%	33%
05			50%	23%	27%	33%	37%	43%
06			17%	23%	23%	20%	17%	27%
07			17%	20%	30%	13%	20%	10%
08	↓		7%	7%	10%	13%	23%	10%
09			7%	7%	7%	3%	10%	7%
10	↓		3%	10%	10%	3%	3%	0%

% of HCPs (Ranked COMPANY in Top 3)

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**Get in touch for a
detailed view**

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