

A WHITEPAPER ON

Physicians' View of the Industry Giants: Ranking the Top Pharmaceutical Companies

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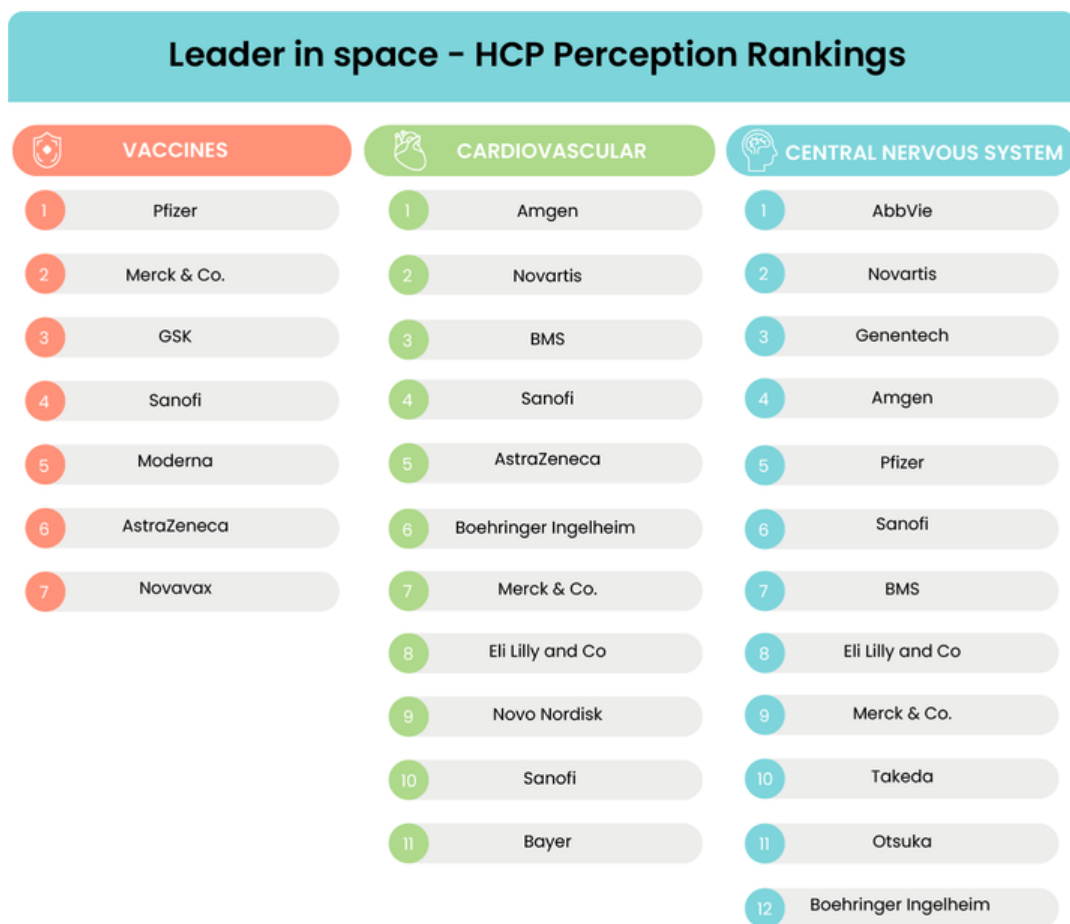


Methodology

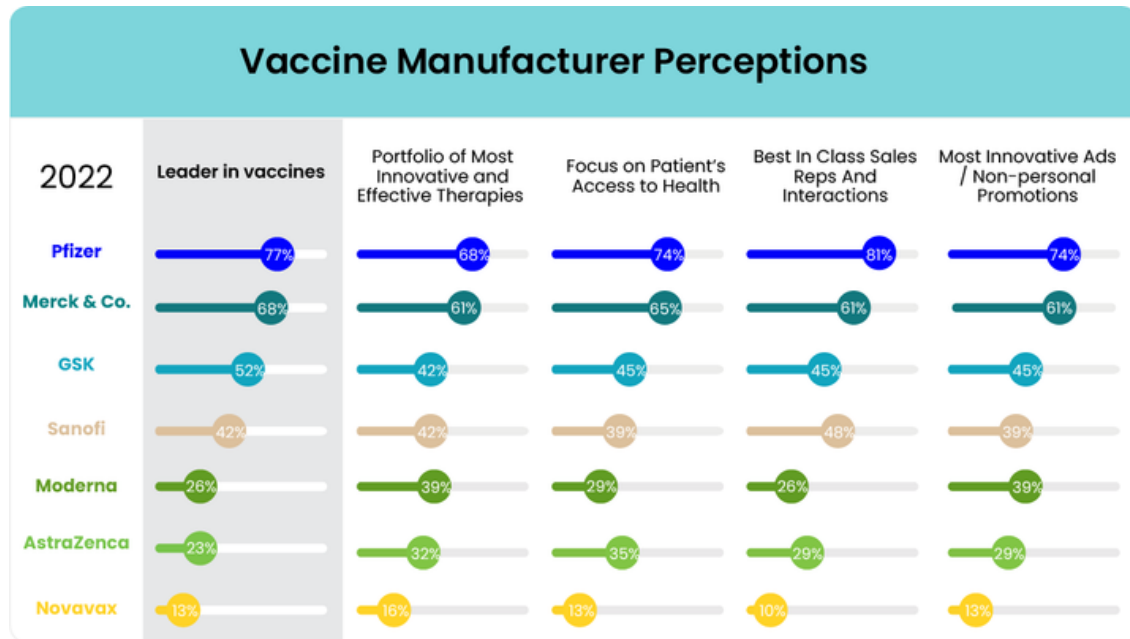
The ZoomRx Manufacturer Perception Report surveyed ~100 HCPs – including cardiologists, neurologists, and PCPs – about how they perceive the key manufacturers in each of the three therapeutic areas.

This report helps understand,

1. Who is perceived as the leader in a space?
2. Whose portfolio is considered to be most innovative and effective?
3. Which manufacturer has the highest quality of promotions (sales rep and non-personal)?
4. What can be done to improve leadership perceptions?



Vaccines



% of HCPs (Ranked COMPANY in Top 3)

HCPs play a critical role in promoting vaccines, and their perceptions can determine the level of trust and acceptance among patients and the public. Positive perceptions of a vaccine manufacturer can lead to higher vaccination rates, as HCPs are more likely to recommend and administer their vaccines. This can also influence the public's awareness and perception of the vaccine and increase willingness to receive it. Here are the top 3 manufacturers the HCPs consider to be the leaders in the vaccine space.

1. Pfizer

Pfizer emerged as the undisputed leader in the vaccine space across all dimensions. Their strong perceptions are driven by their positive association, innovative product lines, frequent physician interactions, and ample patient and staff support as key factors driving positive attitudes. The COVID vaccine Comirnaty has solidified Pfizer's position as a leader in the industry, building upon the already established trust and positive perceptions from their drug Prevnar 20 and cementing their reputation as a provider of innovative and effective solutions. HCPs also mention Pfizer's wide distribution system as a positive aspect

2. Merck

Merck is the second-best following Pfizer across all the attributes.

Doctors mentioned how impressively Merck has handled the stigma around the Gardasil vaccine for HPV and promoted it efficiently. They have been able to effectively communicate the importance and safety of the vaccine, which has led to increased uptake and awareness. Additionally, Merck's promotion and distribution efforts have ensured that the vaccine is widely available and accessible to those who need it. Overall, doctors see Merck's handling of the Gardasil vaccine as a positive example of how a company can effectively promote and distribute a vaccine.

3. GSK

A majority of physicians have ranked GlaxoSmithKline (GSK) among their top three preferred vaccine manufacturers. Their pipeline includes a phase 3 candidate for RSV for older adults, and they are also investing in the mRNA and MAPS platforms. They made a \$3.3B acquisition of clinical-stage firm - Affinivax - for their next-generation pneumococcal vaccine. The knowledge and experience of sales representatives and the patient education materials from GSK are also highly regarded by doctors.

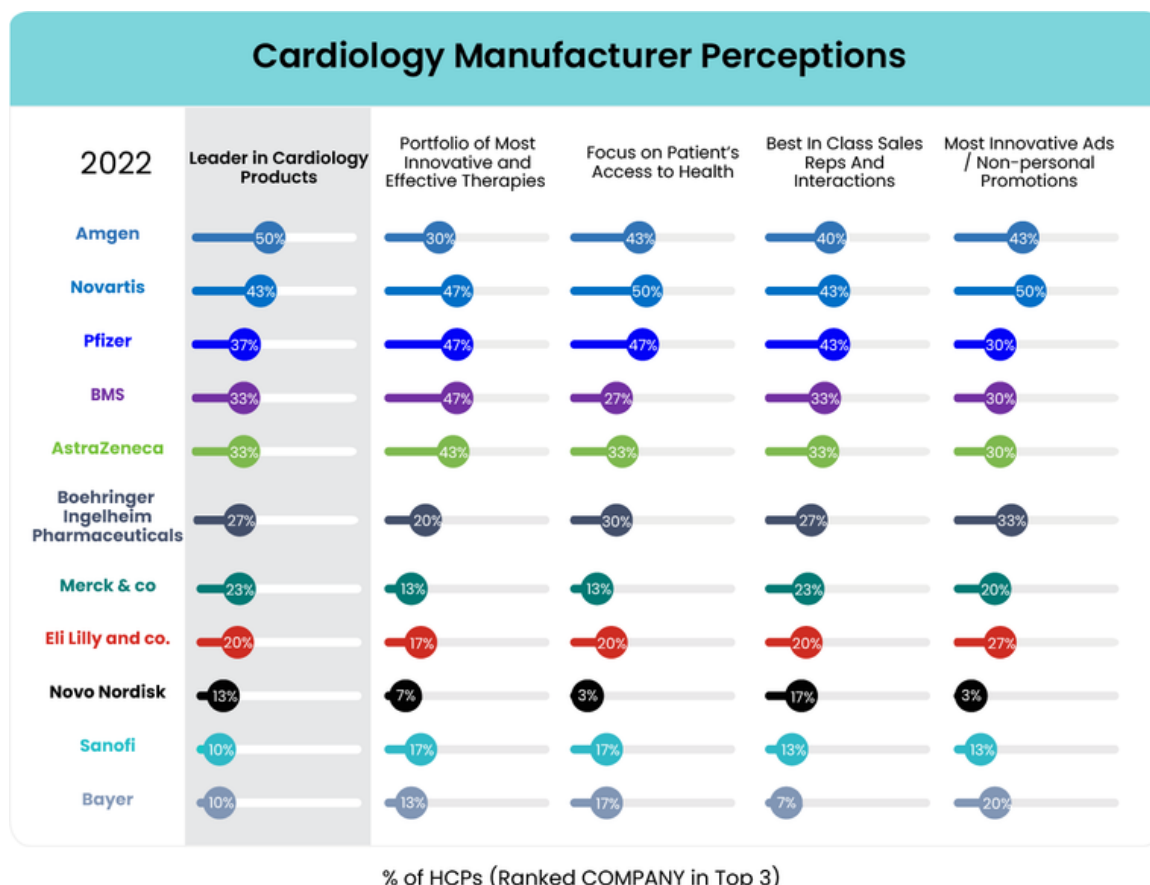
Cardiovascular

Cardiovascular disease still ranks as the leading cause of death, both in the U.S. and globally. This space, which has been muted in the past decade or so, is undergoing changes with multiple approvals for drugs in the past couple of years, including BMS's Camzyos, Novartis's Leqvio, Merck's Verquvo

1. Novartis

Novartis is a top choice among healthcare professionals in the cardiovascular manufacturer space. They cite the company's quality products and commitment to innovative developments as well as excellent customer support and solid clinical research as the key drivers. HCPs also appreciate Novartis' emphasis on personalized communication and their sales reps' understanding of disease states, as well as their efforts to improve patient

quality of life and longevity with their products. The company also uses modern communication methods such as iPads to present their products effectively. Novartis has a diverse portfolio in cardiology, which includes products to treat hypertension, heart failures, and atrial fibrillation, such as Entresto which already has more than a million prescriptions a quarter, Rasilez and its biosimilars, and it is also well positioned with pipeline assets in Iptacopan and Pelacarsen fast moving through the research and is likely to be made available over the next 5 years.



2. Amgen

Though Amgen is widely recognized as a leader in the cardiovascular space, cardiologists opine that the company lacks a strong pipeline of innovative new therapies, which could pose a challenge for their leadership in 2023. Despite this, cardiologists praise Amgen's reps for their knowledge, caring attitude, and responsiveness to their needs, as well as their availability for communication and assistance. They also acknowledge Amgen's LDL cholesterol through its

product Repatha, a PCSK9 inhibitor, And their investigational products in the cardiovascular area. Additionally, cardiologists find Amgen's non-personal promotions such as their app, and their advertisements to be informative, engaging, and tailored to specific patient groups.

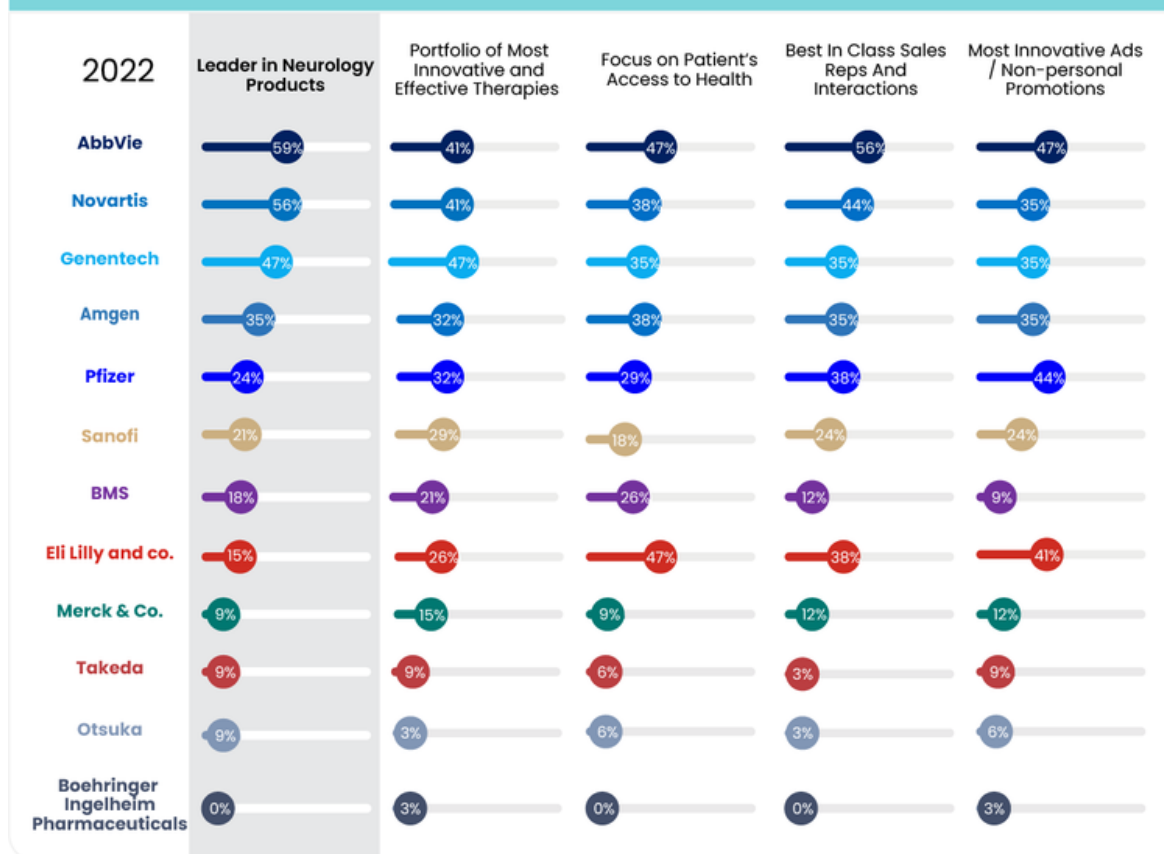
3. Pfizer

Pfizer has a decent product portfolio of cardiology products with a number of other investigational products. It was ranked as the third choice among cardiologists in the cardiovascular manufacturer space, with lower rankings specifically on the attribute of "innovative ads / non-personal promotions". However, cardiologists praised Pfizer's reps for being professional, well-prepared, and respectful of their time. They also noted the quality and reputation of Pfizer's products, as well as their best-in-class customer service. Specifically, a few cardiologists called out Pfizer's amyloidosis medication Vyndamax to be intriguing and appreciated the company's novel messaging of this drug with convincing data. They were also considered to be helping to improve outcomes for large numbers of patients.

Neurology

The neurology drug space is evolving with a focus on developing new and more effective treatments for neurological disorders such as Alzheimer's disease, Parkinson's disease, multiple sclerosis, and others. This is important because these disorders can have a significant impact on a person's quality of life and there is currently a high unmet need for effective treatments. Additionally, the aging population is increasing the prevalence of neurological disorders, making the development of new treatments even more crucial. Companies are now focusing on developing drugs that target specific mechanisms in the brain and are also exploring the use of gene therapy and stem cells in the treatment of these disorders. The disruption is evident with smaller biotechs like Marinus & TG Therapeutics winning approvals for Ztalmy & Briumvi, respectively, in 2022.

Neurology Manufacturer Perceptions



% of HCPs (Ranked COMPANY in Top 3)

1. Abbvie

Abbvie is a top choice among neurologists in the neurology drug space. The company is recognized for the breadth of its medication offerings, as well as the expertise and availability of its representatives. Neurologists appreciate Abbvie's professional, respectful, and time-conscious approach when interacting with them. Abbvie's representatives are considered highly knowledgeable, prepared, efficient, and quick to respond to questions. They also provide samples and help connect patients to the appropriate products. Neurologists also recognized Abbvie's innovative, science-focused marketing including some celebrity TV Ads (Duopa promotions were specifically called out). They also appreciated informative and personalized e-mails, including real-world clinical data from the company. Abbvie is expecting approval for ABBV-951 in Parkinson's disease in early 2023 and more expansions for Vryalar in near future. They acquired Syndesi Therapeutics in 2022 adding first-in-class modulators.

2. Novartis

Neurologists appreciated Novartis's consistent promotional efforts through creative patient brochures, journal advertisements, and direct-to-consumer ads. They also indicated that Novartis's sales representatives and Medical Science Liaisons as highly knowledgeable and credible, and the company's patient and physician support programs are among the best in the industry. Novartis has a sleuth of products for multiple sclerosis in Gilenya, Kesimpta, and Mayzent. They also have a disease-altering product in Zolgensma for Spinal Muscular Atrophy. Though their pipeline is strong with assets for MS (Remibrutinib), and Huntington's disease (Branaplam), they are not expected to be approved before 2026.

3. Genentech

The company's representatives are experienced and have established relationships with practices, known for being informative without being pushy. These reps are easily available and knowledgeable about the products they represent. Additionally, Genentech's Ocrevus ads are noted for being catchy and appealing. Genentech is a strong player in the neurology space, with a blockbuster drug, Ocrevus, for multiple sclerosis (MS) and a new drug, Evrysdi, targeting an unmet need in the highly competitive spinal muscular atrophy (SMA) space. Despite its strong portfolio, the negative results of Gantenerumab in late 2022 is expected to affect the portfolio. Neurologists rank the company third for their effective, safe, and innovative products, as well as their strong research efforts.

The top of the HCP perception ranking list - How to get there and stay there

1. Have a Long-Term Portfolio Orientation

Consistency is the key. Manufacturers who are consistently innovating and meeting unmet needs build stronger HCP perceptions like that of Pfizer in the vaccines space.

2. Customize HCP Interactions

The message is clear from the HCPs. They value knowledge about their practice and responsiveness to their questions and needs as key factors in improving perceptions of a manufacturer. The know-how of the product and indication is considered table stakes in the conversation

3. Innovate in Non-Personal Communications

HCPs opine that novel & eye-catching communications that focus on disease specificity and clinical data help manufacturers to stay memorable.

In conclusion, the pharmaceutical industry is constantly evolving, and the perceptions of healthcare professionals (HCPs) play a critical role in shaping the public's trust and acceptance of drugs. In each of these areas, HCPs have cited several leading manufacturers, such as Pfizer, Merck, Novartis, and Amgen, who are recognized for their innovative products, customer support, and effective communication efforts. These perceptions can greatly impact the level of acceptance and uptake of treatments, and it is essential that pharmaceutical companies continue to strive for excellence and prioritize the needs of HCPs and patients alike.

ZoomRx's Promotional Effectiveness Tracking

ZoomRx Promotional Effectiveness Tracking (PET) tracks Rep effectiveness, Message Performance, and Channel Performance, helping 100+ Pharma brands stay ahead of the competition.

ZoomRx PET offers customized tracking for each brand, ensuring that the results are tailored to their unique needs. With Omnichannel tracking for both their brands and competitors, companies can get a comprehensive view of the market. The 30,000-plus ZoomRx physician panel provides valuable insights and access to benchmarks of 10 million data points giving brands the information they need to make informed decisions.

**To understand the perception of your brands, competitors,
and promotions**

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