Market Research Summary Sheet



{DATE \@ "M/d/yy H:mm AM/PM" * }

Therapeutic Area: CNS	IO#: 9501445
Project Name : Diabetes Msg Evolution – Diagnose,	PO#: 4500016994
Monitor, and Treat education piece	
Methodology: Qualitative	Brand Group: Marketplace Management
Data Collection Methodology: Focus Groups	Player Setting: Psychiatrist
Project Completion Date: 3/7/02	Project Owner: Tom Reck

Marketing Objective:

Determine how to evolve the Zyprexa Diabetes Message in the psychiatrist marketplace

Research Objectives:

- ❖ Determine attitudes & practices toward diagnosing, monitoring and treating diabetes
- Determine if the "Diagnose, Monitor, & Treat" (DMT) message would enhance or, possibly, conflict with the intent of the "Comparable Rates" message
- Evaluate the potential equity as well as possible "unintended consequences" of offering such a program
 - ➤ Should Lilly leverage its reputation as being the leader in diabetes?
 - > Can Lilly address the diabetes concern without taking further ownership of it?
- Evaluate how well prepared psychiatrists are to treating diabetes
 - ➤ Determine if some physical tools, such as blood glucose monitoring kits, would be of value to psychiatrists & support the DMT message

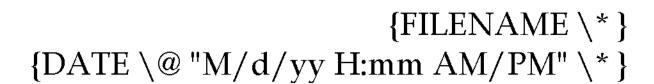
Methodology:

- ❖ 5 2-hour Focus Groups w/ a total of 17 physicians
 - ➤ 2 High Flyer groups, and 1 each of Rule Bound, Selective Treaters, & Skeptical Experts

Key Findings:

- Treating diabetes would cross a defined line in the minds of psychiatrists regarding standard of care
 - > None are interested in treating it; some are legally bound by insurers not to treat medical illnesses
 - > All indicated that they would refer such patients out as soon as they suspected a problem
- By directly addressing diabetes, Lilly is owning up to the issue in MDs' minds this contradicts the intent of the Comparable Rates msg, despite the fact that MDs view DMT as an educational piece
- ❖ Providing objective education materials to physicians like the DMT piece is seen favorably
 - > Sincere efforts by pharma co's to treat patients are perceived to be rare, but would build equity
 - > Some MDs expressed that this piece must represent a bigger problem w/ Zyprexa and diabetes
- ❖ MDs see Lilly as the brutish aggressor due to our QTc campaign, not the underdog we'd like to be
 - ➤ MDs resent the amount of money and time Lilly spent on the QTc campaign; some seemed to feel sorry for Pfizer

Lilly





Competitors' msgs about Zyprexa are being heard in marketplace, but are not recognized as attacks

Physician Segment Observations

- High Flyers: most important segment in terms of Zyprexa scripts written; have heard the most competitive messaging around diabetes; more likely to attribute diabetes as being caused by Zyprexa; most concerned about PT satisfaction and interested in services to help improve patient wellness
- Rule Bound: second most important segment in terms of scripts written; least likely to attribute diabetes as being caused by Zyprexa; only segment that wanted more data in DMT piece, but not likely to use it
- Selective Treaters: not a big segment for Zyprexa; least likely to treat medical illness not caused by meds
- Skeptical Experts: important segment and highly detailed very aware of the Lilly Janssen battles; like other groups, SEs were confused about the audience of DMT it was above patients and beneath MDs

Recommendations/Actions:

- If used, alter the language in the DMT piece
 - > Best if focused on patient as the audience would be a reminder for MD, but not insult them
 - Consider offering similar educational material pieces about other medical issues to build additional equity and not appear to be solely focused on one medical issue (substance abuse, CV, etc.)
- Utilize multiple marketing tools, such as competitive case reports, CDE, NTTP, and journal ads, in addition to the sales rep message, to more effectively communicate Zyprexa's diabetes msg
- Use DTP forums to communicate the Comparable Rates data and educate physicians on diabetes
- ❖ Build effective tools to address weight gain
 - > Association to diabetes is mixed, but the association to weight gain is 100%
 - Zyprexa is seen as the most efficacious and having the best outcomes, except for the weight gain
 - ➤ Weight gain solutions would help alleviate concerns about diabetes and other medical issues

Remaining Questions:

The Comparable Rates message was designed and tested before the existing physician segmentation was created; a more targeted and segmented approach may be more effective than the existing plan

Vendor: Harper	Vendor Contact: Tonya Harper	Lilly Contact: Tom Reck
Cost: \$27,000	Vendor Status: Preferred	Vendor Evaluation: Good

To: CN=Eric L Prouty/OU=AM/O=LLY@Lilly; CN=Eric H Schultz/OU=AM/O=LLY@Lilly; CN=John R

Richards/OU=AM/O=LLY@Lilly; CN=Michael D Yost/OU=AM/O=LLY@Lilly; CN=David E

Biloon/OU=AM/O=LLY@Lilly; CN=Katherine A Armington/OU=AM/O=LLY@Lilly; CN=James S

Singell/OU=AM/O=LLY@Lilly; CN=Diana T Caldwell/OU=AM/O=LLY@Lilly; CN=Kelly

Copes-Anderson/OU=AM/O=LLY@Lilly; CN=Zohar Porat/OU=AM/O=LLY@Lilly; CN=Elizabeth Lehr

Ridenour/OU=AM/O=LLY@Lilly; CN=Olin Barnett/OU=AM/O=LLY@Lilly; CN=Thomas L Reck/OU=AM/O=LLY@Lilly; CN=Orsa L Britton/OU=AM/O=LLY@Lilly; CN=Darren Keith

Roach/OU=AM/O=LLY@Lilly; CN=W Keith Fenton/OU=AM/O=LLY@Lilly; CN=Jill R

Welch/OU=AM/O=LLY@Lilly; CN=Vincent P Truax III/OU=AM/O=LLY@Lilly; CN=Jack E

Jordan/OU=AM/O=LLY@Lilly

CC: tonya@morefromus.com; david@morefromus.com

Date: 01/15/2002 03:12:41 PM

From: CN=Mary K Orton/OU=AM/O=LLY
Subject: Institution Round 3 Executive Summary

Attachments: Inst Mess Dev 3 ExecSum.doc

Please let me know if you have additional questions or concerns. Thanks!



Inst Mess Dev 3 ExecSum.doc

Kacie Orton U.S. Market Research - Zyprexa

VMX: 317-651-2301 redacted

Page: 1 of 1