
Lilly

Answers That Matter.

Zyprexa Market Research

**Zyprexa Side Effect
Perceptual Tracking Study
Comparison Across Waves 1-3**

The Lilly logo is written in a black, cursive script font.

Answers That Matter.

Overview

- Background of Marketplace Mgt
- Study Objectives & Methodology
- Key Learnings across Waves
- Next Steps

Overview of Zyprexa Marketplace Mgt

Purpose: to identify and effectively manage Zyprexa's competitive issues, threats and opportunities in the marketplace to ensure optimum competitive positioning for Zyprexa

Brand Team: Kathy Armington, Cassie Mehlman, ReJana Garon

Issues:

- Weight Gain & Hyperglycemia/Diabetes

Threats:

- Risperdal Depot, Aripiprazole Launch, Lipids/CV/IR

Opportunities:

- EPS/TD

Tracking Study - Objectives

Track changes in physicians' perceptions of the relationship between taking psychotropic medications and the occurrence of weight gain, diabetes & lipids.

Specifically:

- Which agents are most commonly associated with weight gain, diabetes & lipids?
- How do these associations influence prescribing behavior (capturing and retaining patients)?
- What types of patients are considered good/not good candidates for specific psychotropic agents?
- What are physicians' attitudes toward weight management with patients taking psychotropic medications?
- How are physicians' currently dealing with the issues above?

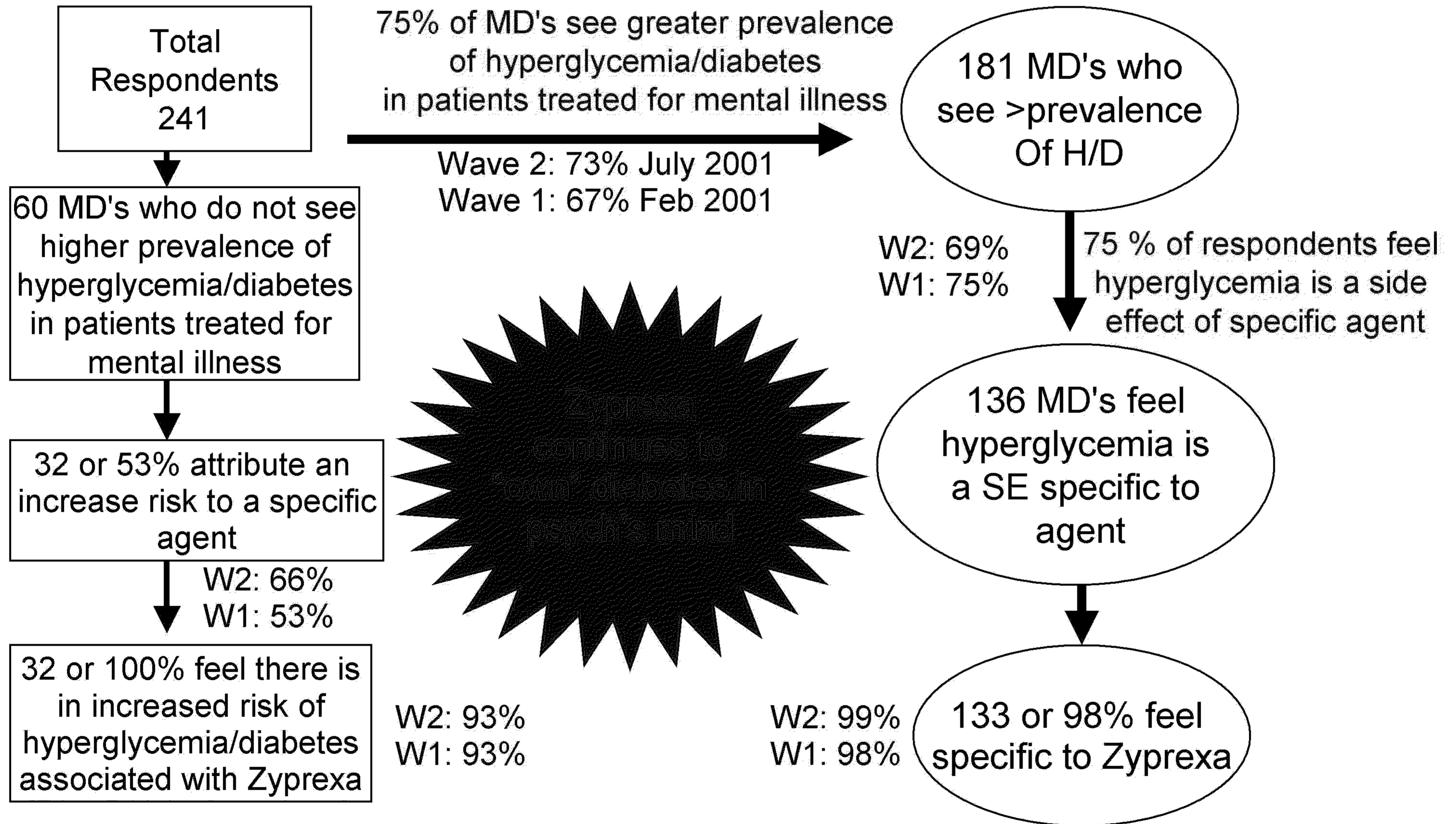
Methodology

- Internet based survey
- Study fielding:
 - Wave 1: Feb. 2001
 - Wave 2: Jul. 2001
 - Wave 3: Jan. 2002
- Participants
 - 100 PCPs each wave
 - 240 Psychs each wave
 - 80 each from private practice, CMHC and institution

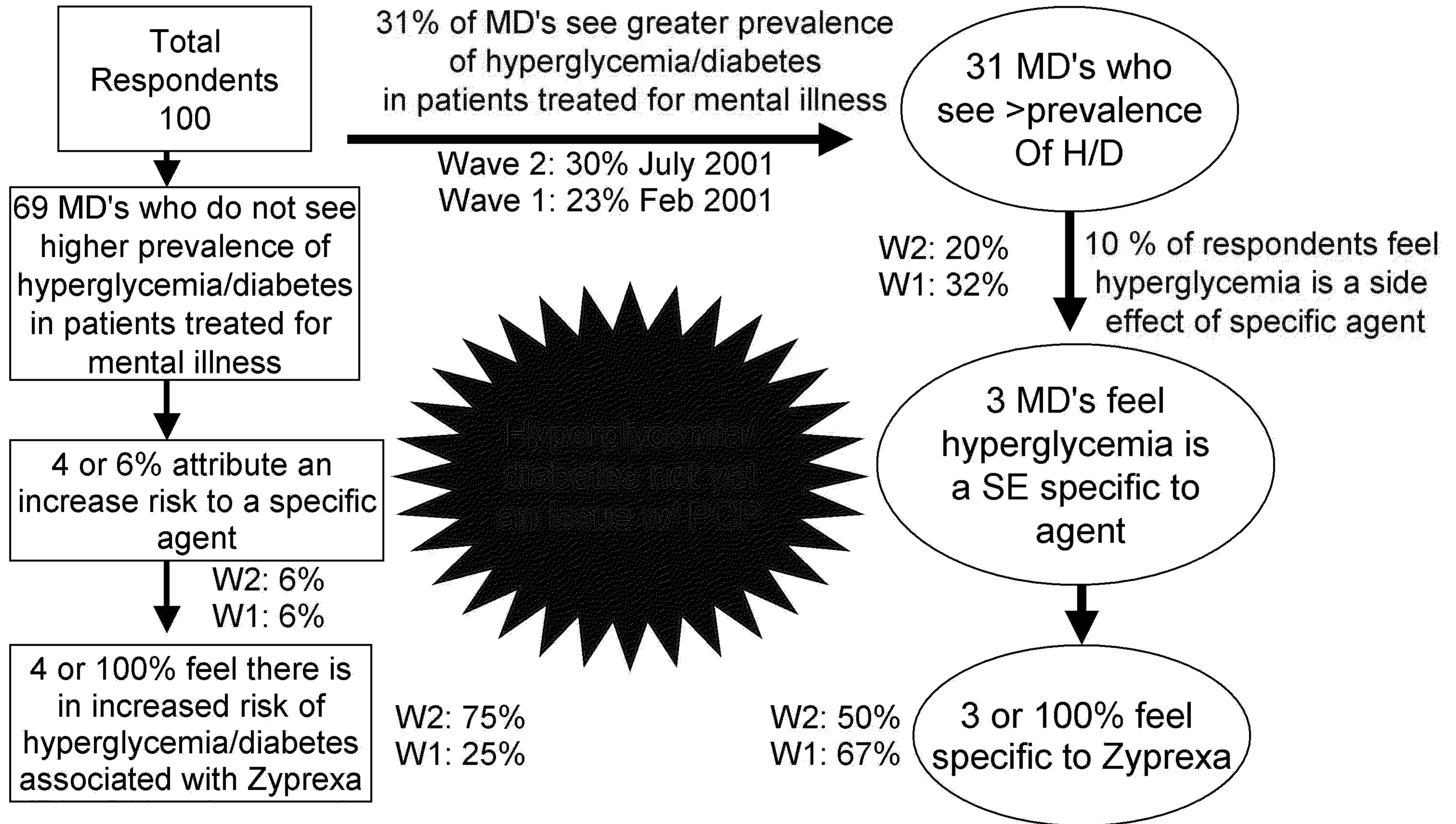
Key Learnings - Diabetes

- Perceptions of prevalence in mentally ill on the rise
 - Psychs see it more and more often
 - PCPs still are not concerned
- Comparable rates are not perceived in marketplace
- Impact on prescribing: fewer starts and more discontinuations due concerns for diabetes
- DKA is a concern for using Zyprexa with psychs but not for PCPs

Flow Chart of Psychiatrist Responses



Flow Chart of PCP Responses

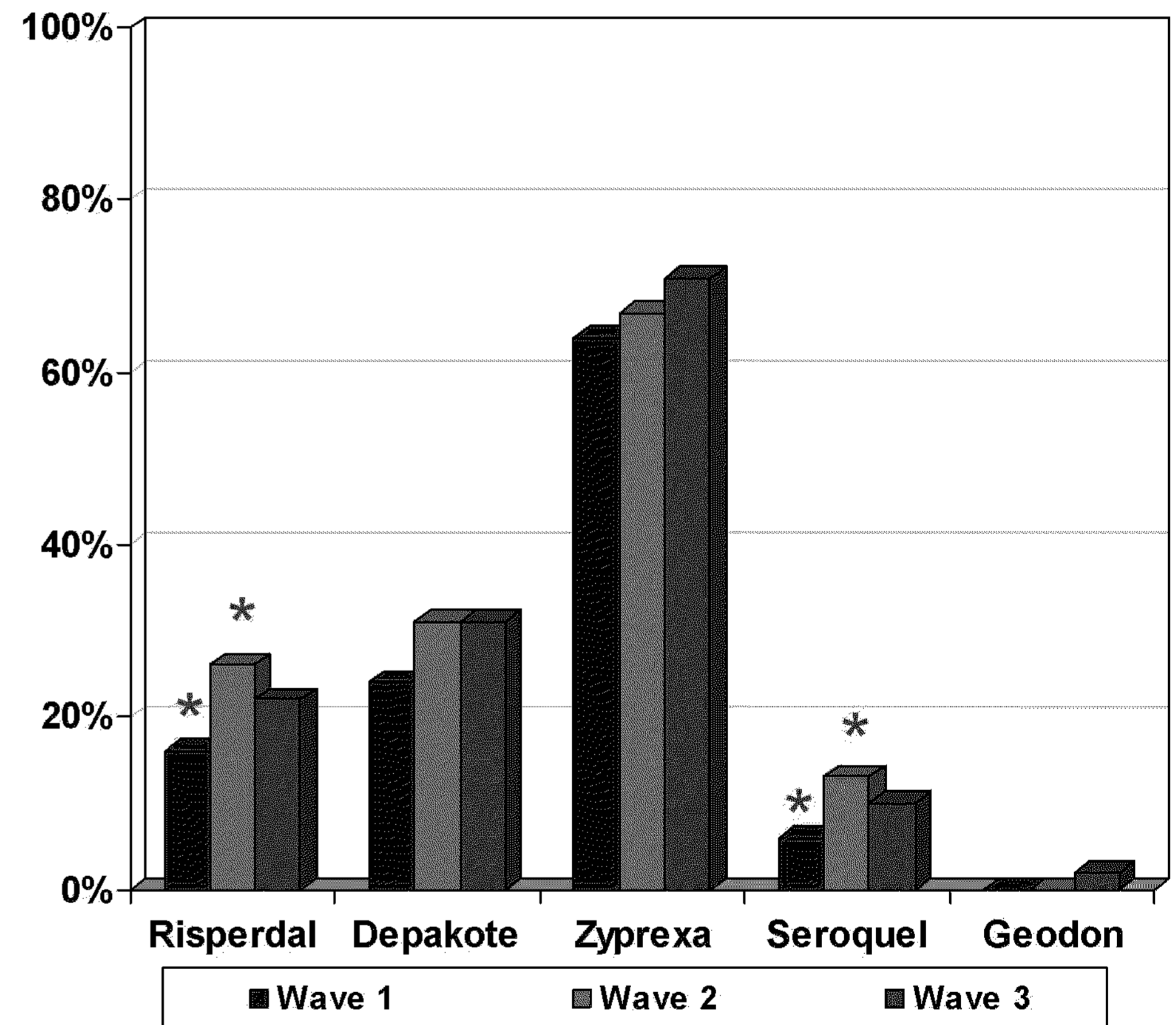
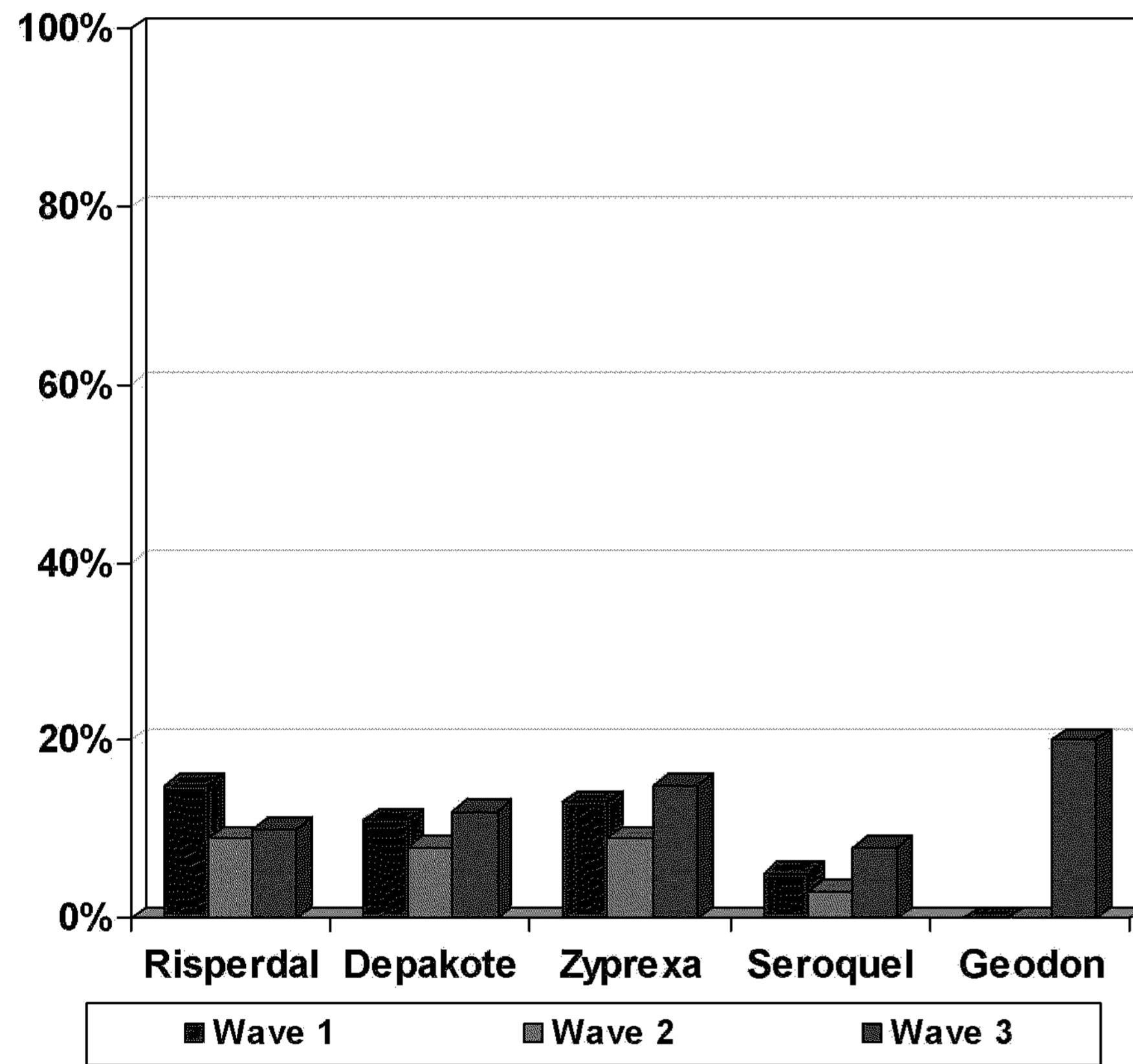


Comparable Rates the perception of MDs

Patients developing hyperglycemia/diabetes by medication

PCP

PSY

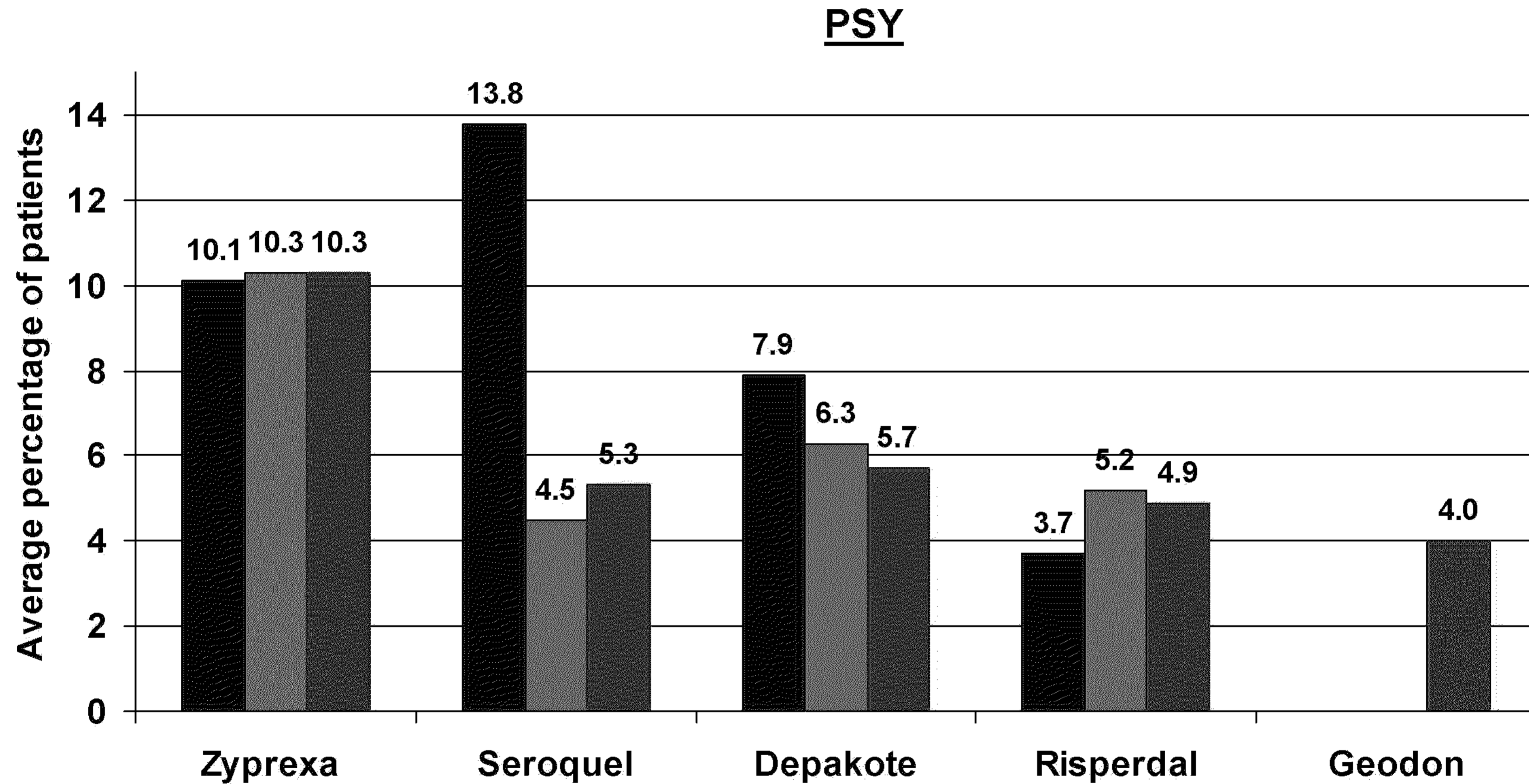


Base: Prescribes medication

Q630 Have any of your patients taking... developed hyperglycemia and/or diabetes?

Overall percentage of patients is constant

Percentage of [target medication] patients with hyperglycemia/diabetes



Note: PCPs not reported due to sample size

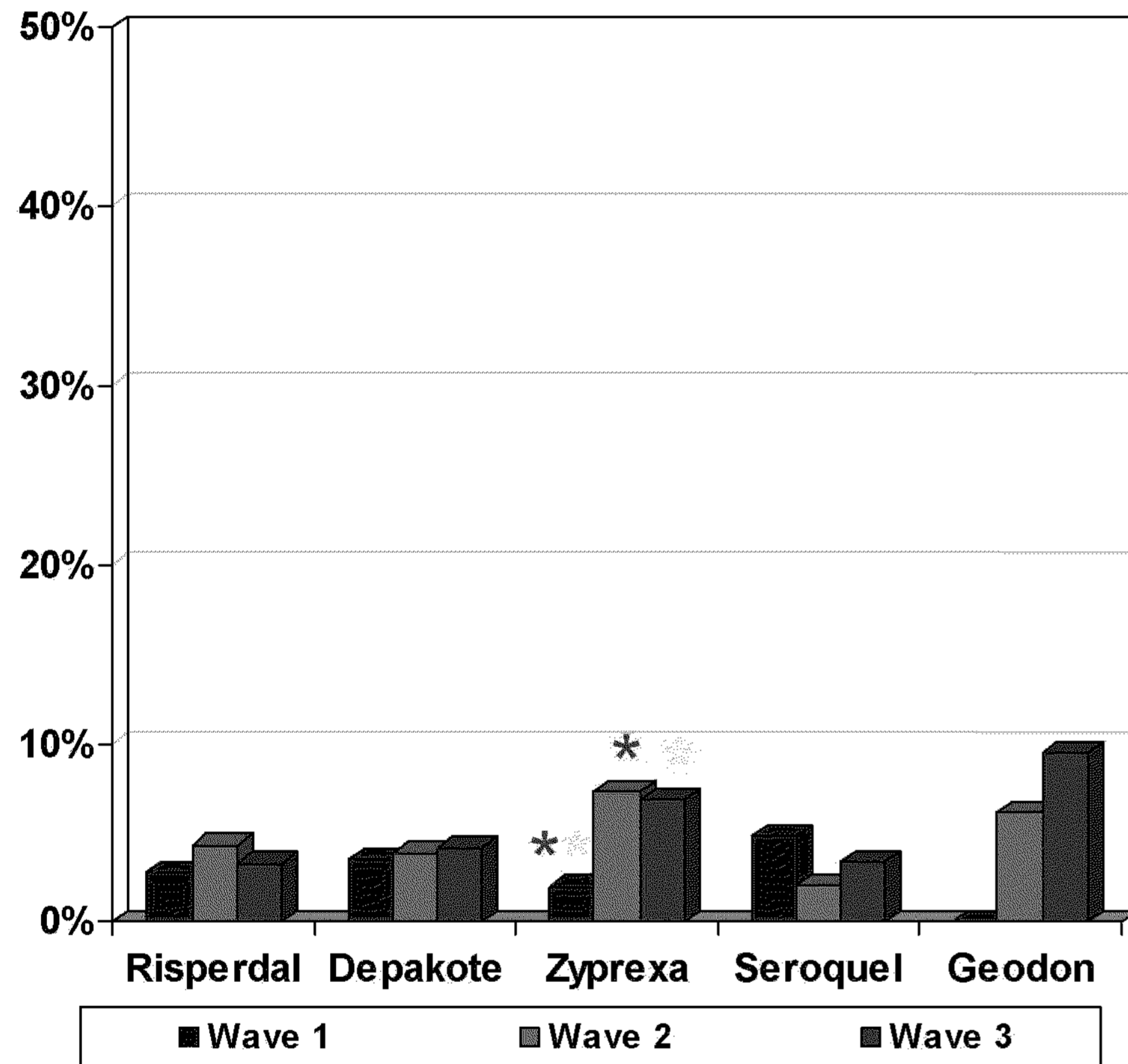
■ Wave 1 ■ Wave 2 ■ Wave 3

Base: Have patients taking... develop hyperglycemia/diabetes
Q645 What percentage of your... treated patients does this represent?

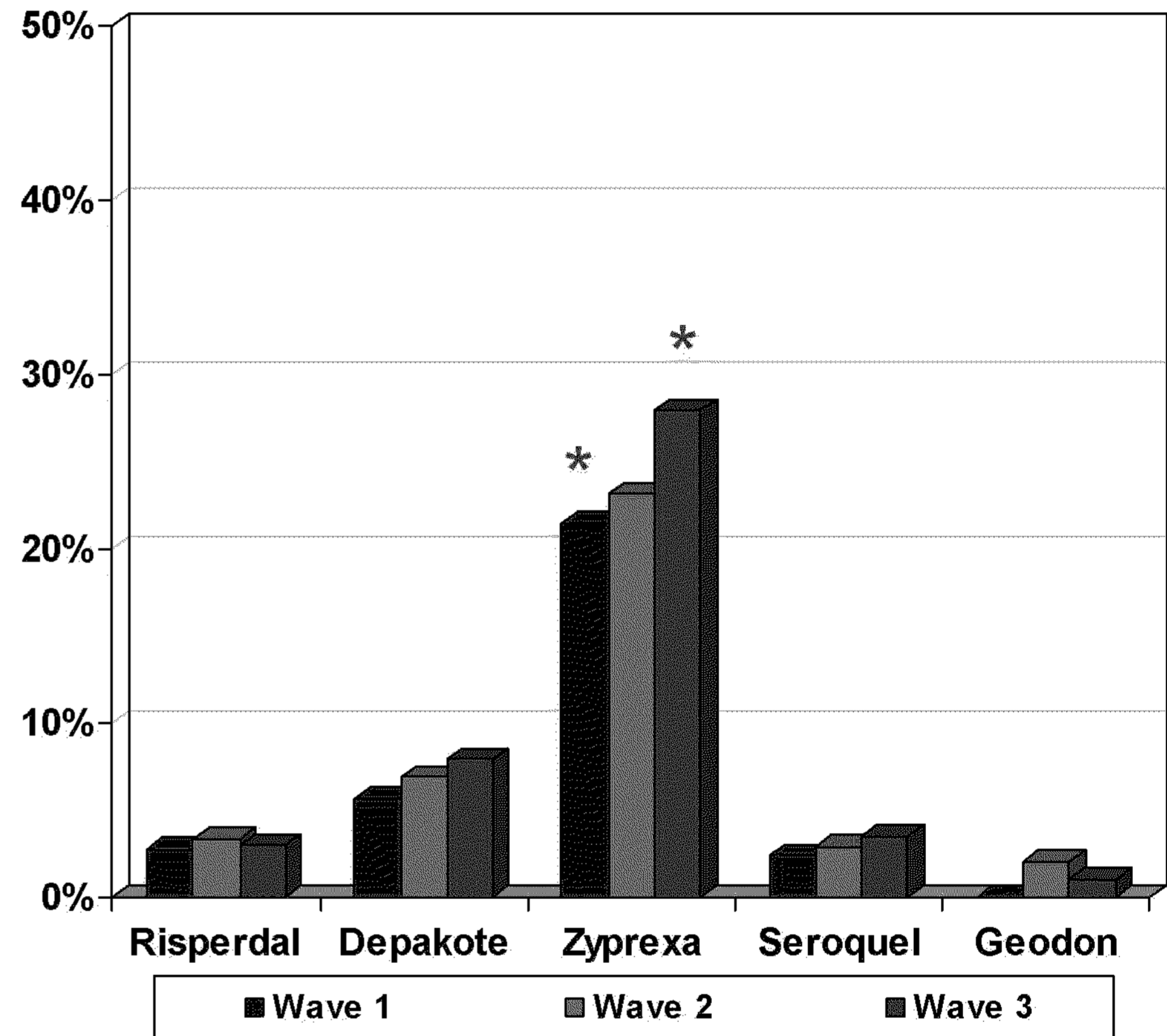
Impact on prescribing is worsening for psychs

Concerns about hyperglycemia/diabetes prevents prescription

PCP



PSY



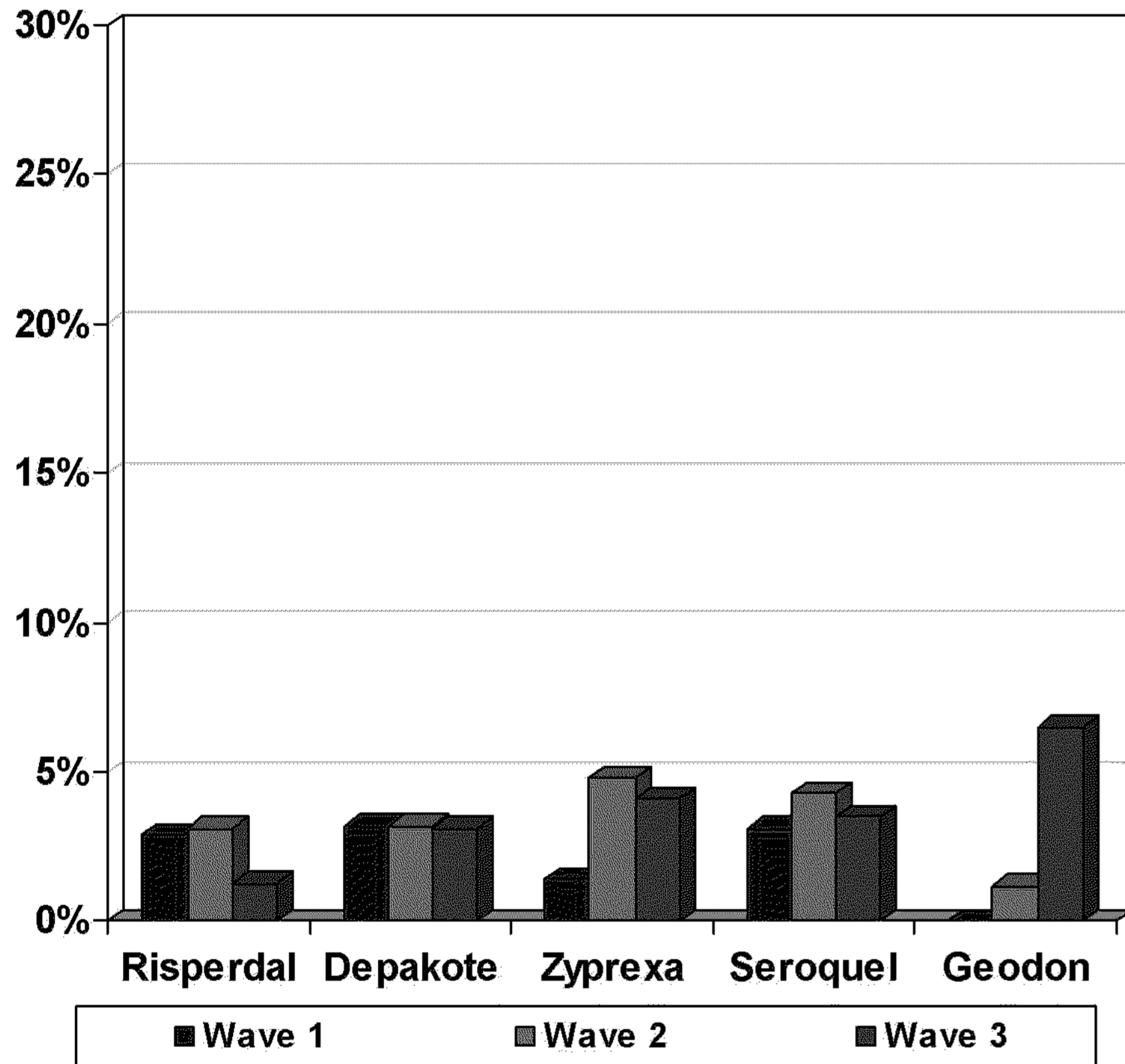
Base: Prescribes Medication

Q650 When you consider prescribing..., what percentage of the time do you make a conscious decision not to prescribe it due to concerns about hyperglycemia and/or diabetes?

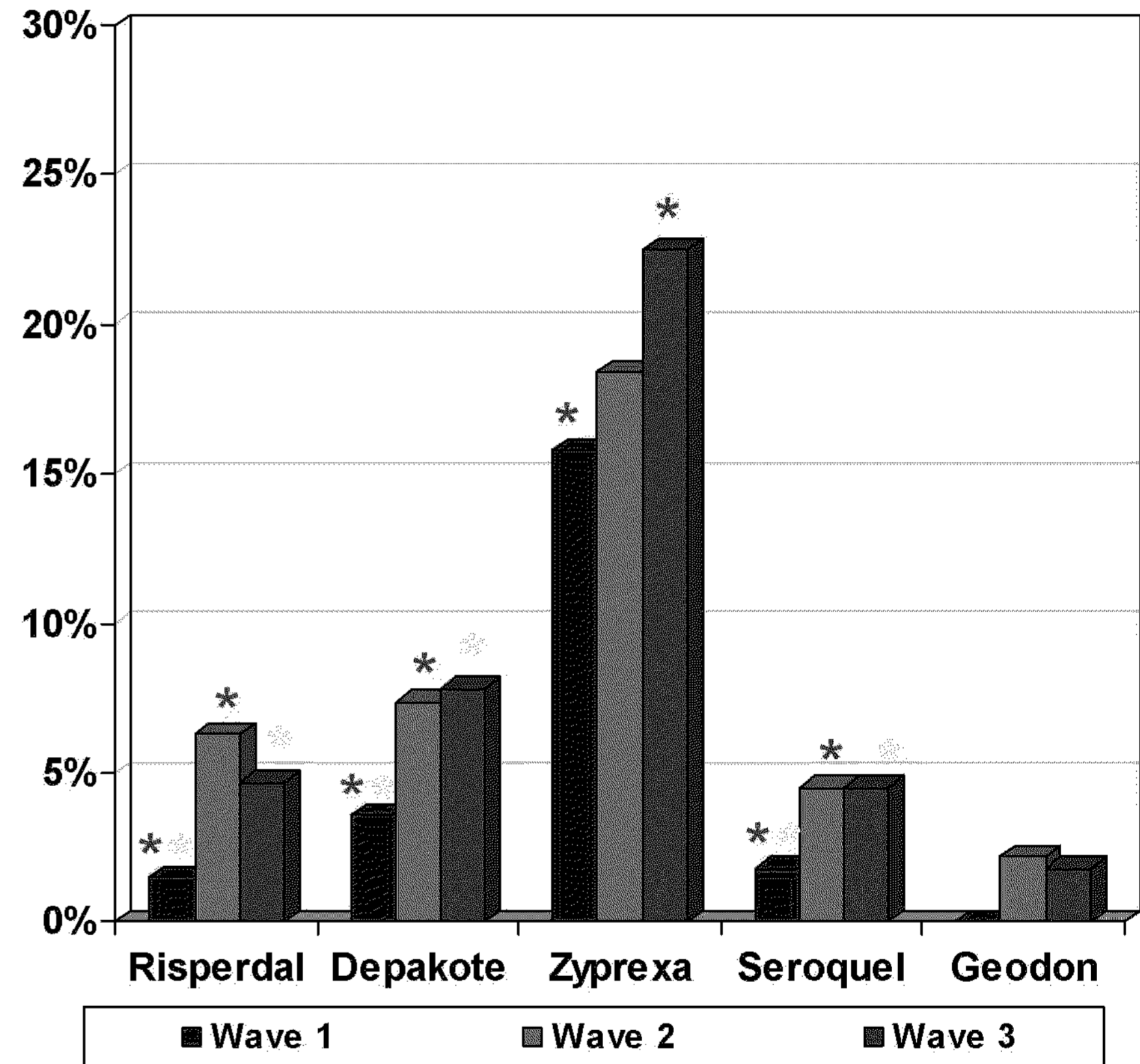
Discontinuations also continue to rise

Discontinues medication due to hyperglycemia/diabetes

PCP



PSY



Base: Prescribes medication

Q660 What percentage of the time do you discontinue use of... due to hyperglycemia and/or diabetes?

DKA is a concern for psychs, not for PCPs

Diabetic Ketoacidosis

	PCP (n=100)		PSY (n=241)	
	Average	Do not prescribe %	Average	Do not prescribe %
Seroquel	1.7 *	41 * *	1.8	1
Risperdal	1.7 *	2 *	1.9	0
Depakote	1.8	4 *	2.0	1
Zyprexa	1.8	8 *	2.9 ∞	0
Geodon	2.0 *	69 ∞	1.6 ⊗	8 ∞

Scale: 1 to 5 where 1 is Never and 5 is Always

∞ : Significantly higher than all other entries in column

⊗ : Significantly lower than all other entries in column

Base: Prescribes medication

Q1046 When you prescribe each of the following drugs, how often are you concerned about DKA (diabetic ketoacidosis)?

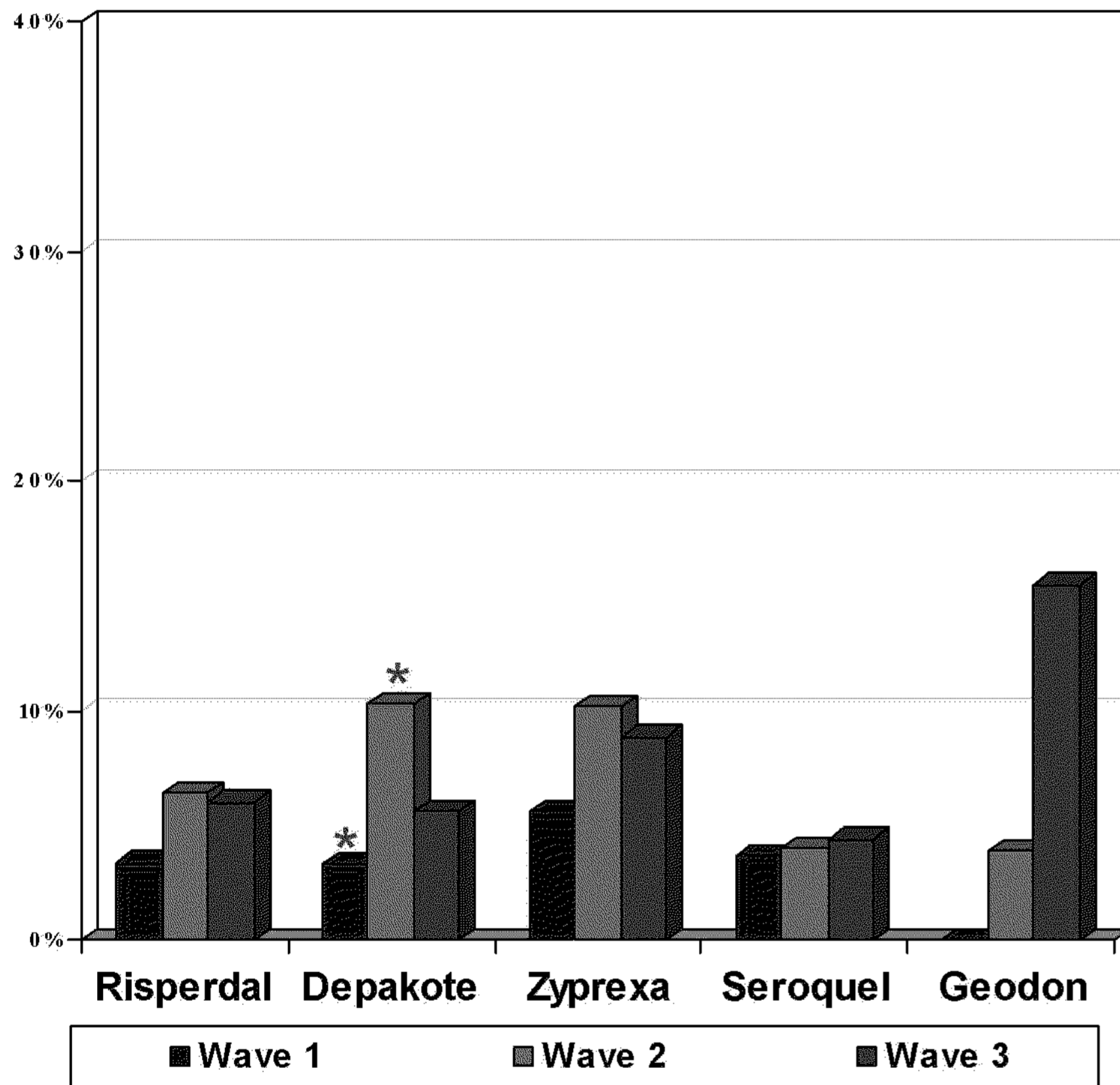
Key Learnings - Weight Gain

- Impact on prescribing starts and discontinuations
 - Concerns about WG appear to be flat or rising
 - Depakote and Seroquel gaining association w/ WG
 - PCPs are seeing more WG w/ all AP drugs – avoiding Zyprexa w/ overweight patients more often than last year
- Weight manageability
 - Psychs are looking for new solutions & help in addressing issue

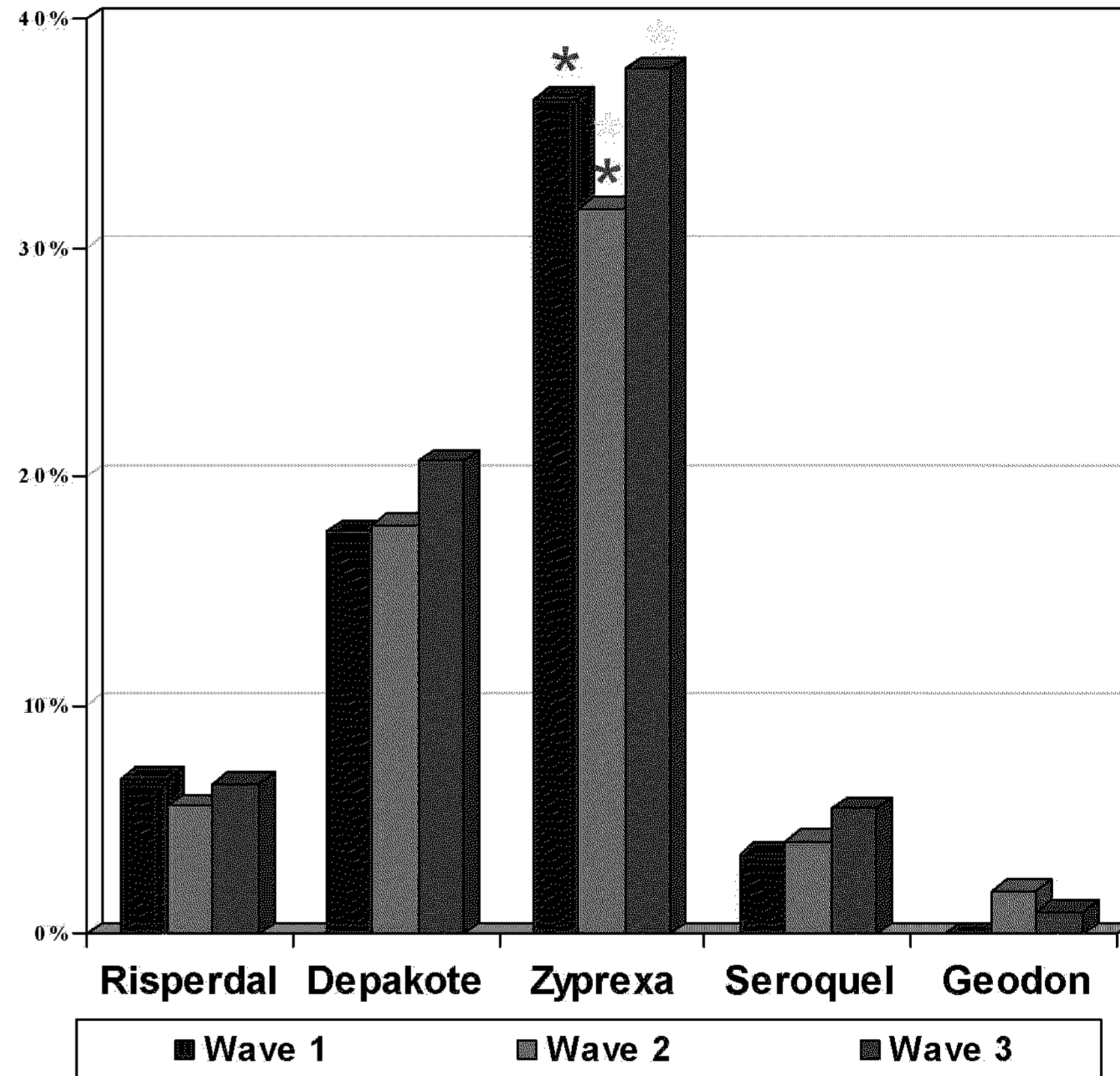
WG still a major deterrent to psych use, not PCP

Concerns about weight gain prevents prescription

PCP



PSY

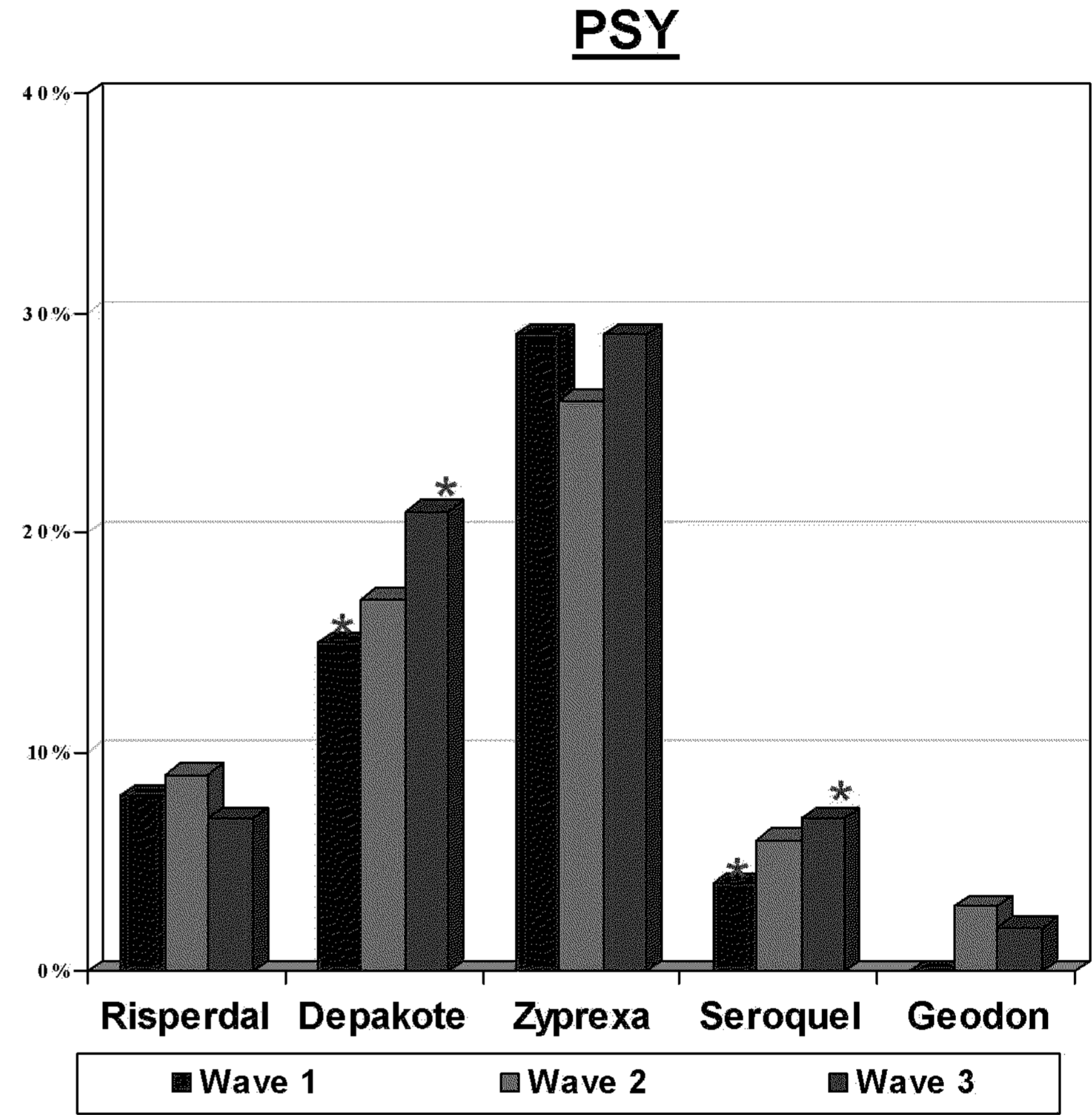
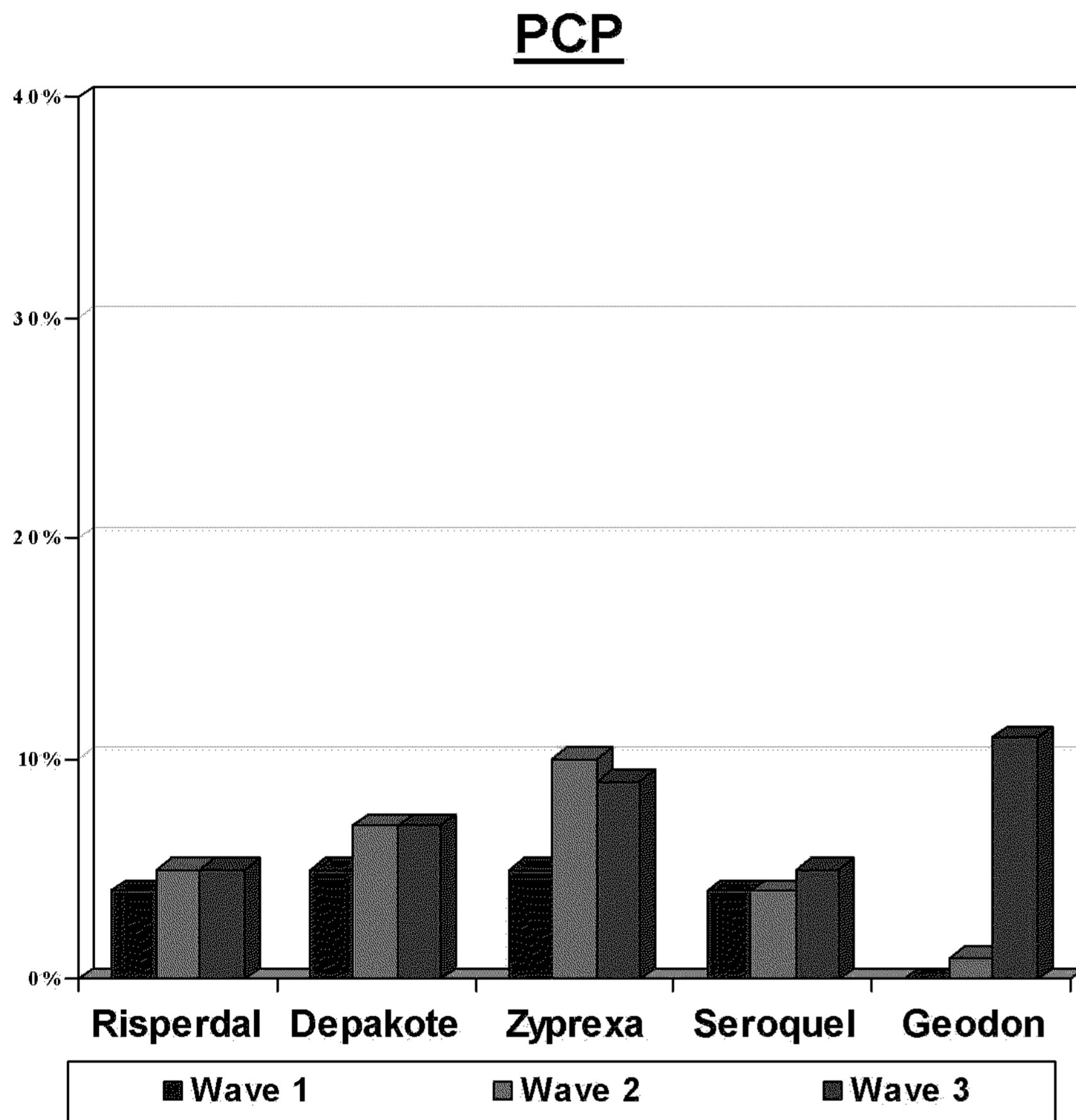


Base: Prescribes medication

Q700 When you consider prescribing..., what percentage of the time do you make a conscious decision not to prescribe it due to concerns about weight gain?

Psych discontinuations rose for Dpk and Seroquel

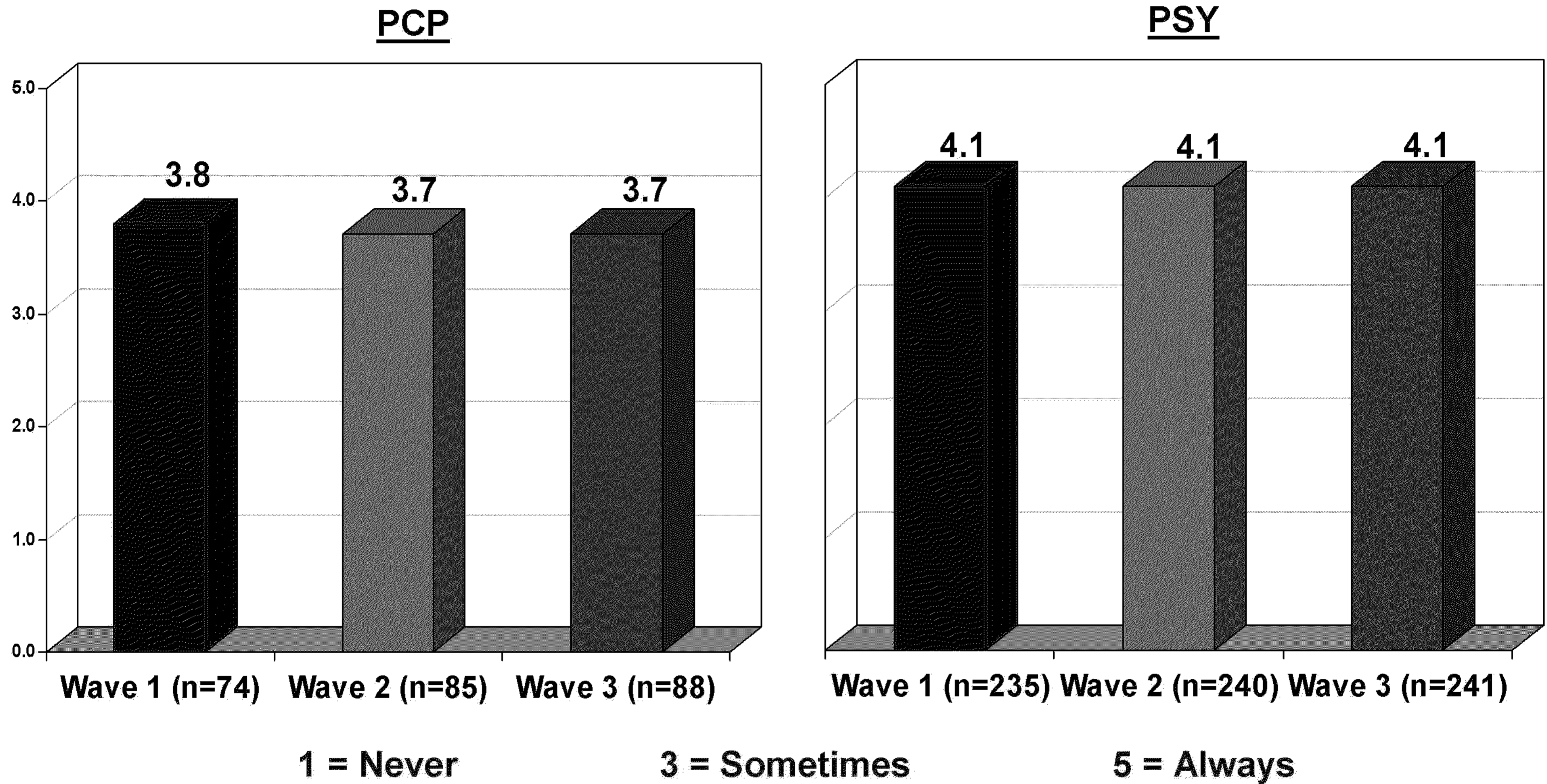
Discontinues medication due to weight gain



Base: Prescribes medication
 Q710 What percentage of the time do you discontinue use of... due to weight gain?

Discussing weight gain is standard of care

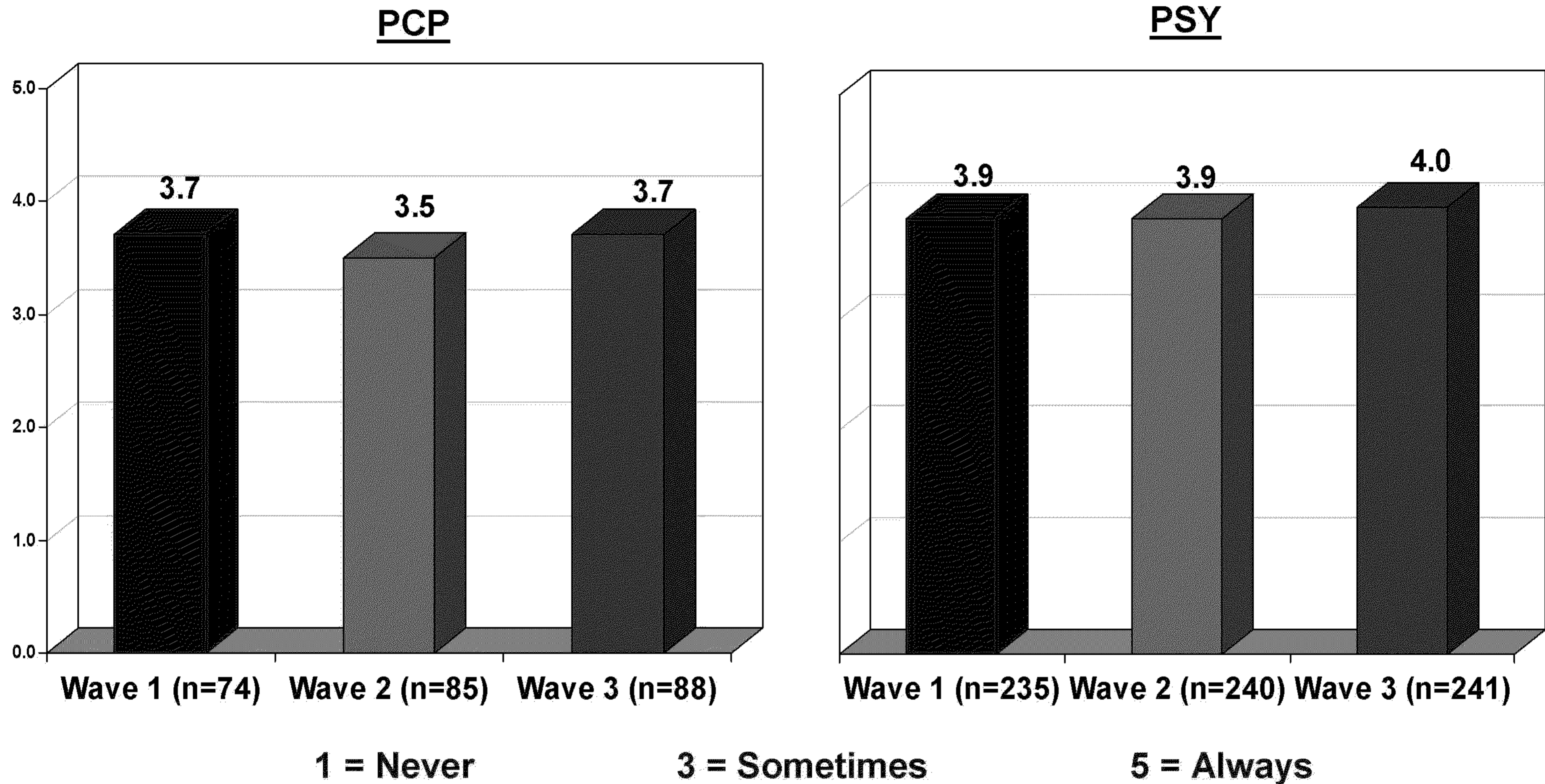
Discussions about weight gain management



Base: Concerned about weight gain in patients that are treated with psychotropic agents
Q520 How often do you discuss the management of weight gain with your patients?

Discussing healthy living is nearly as common

Counseling about healthy living

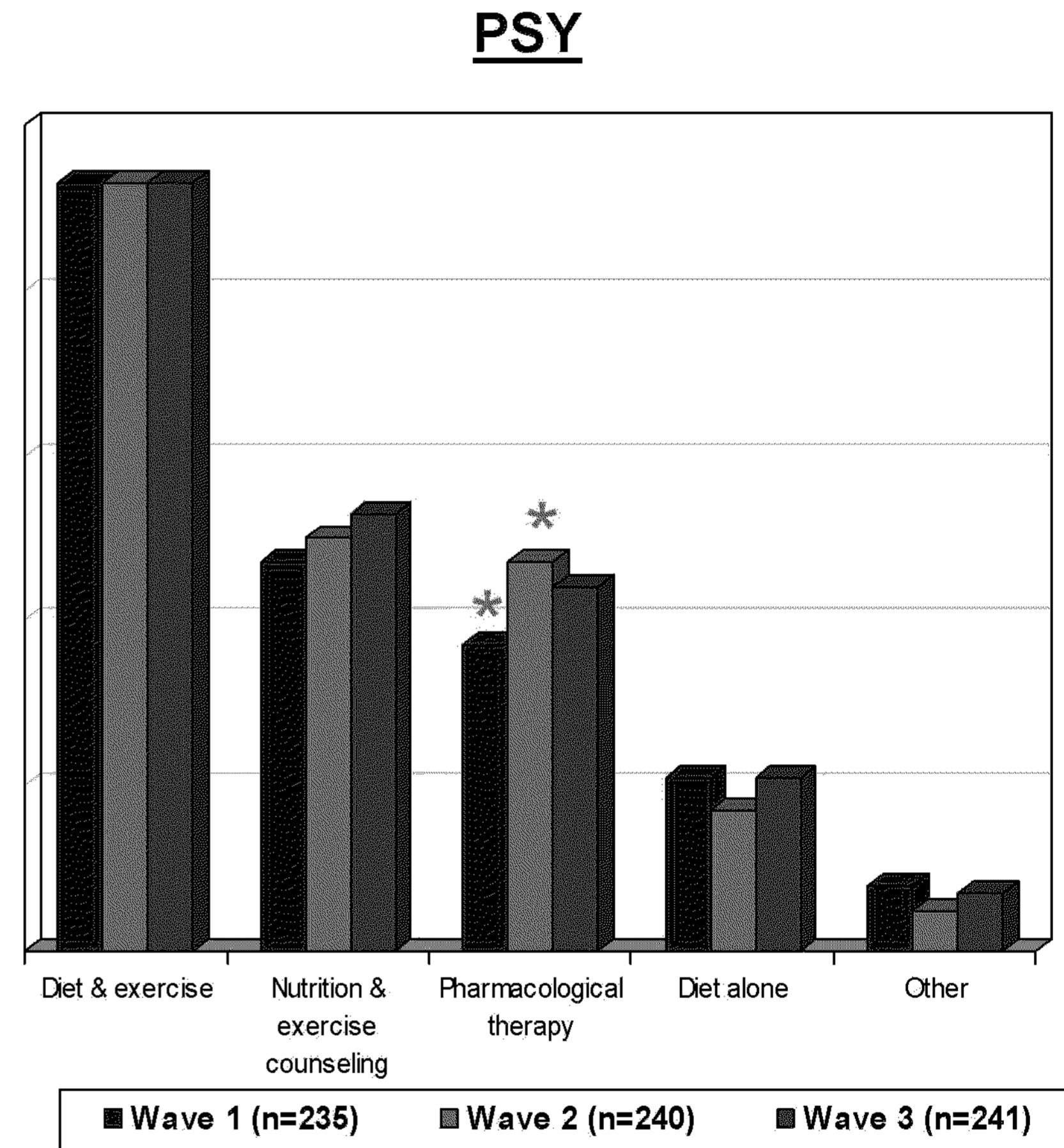
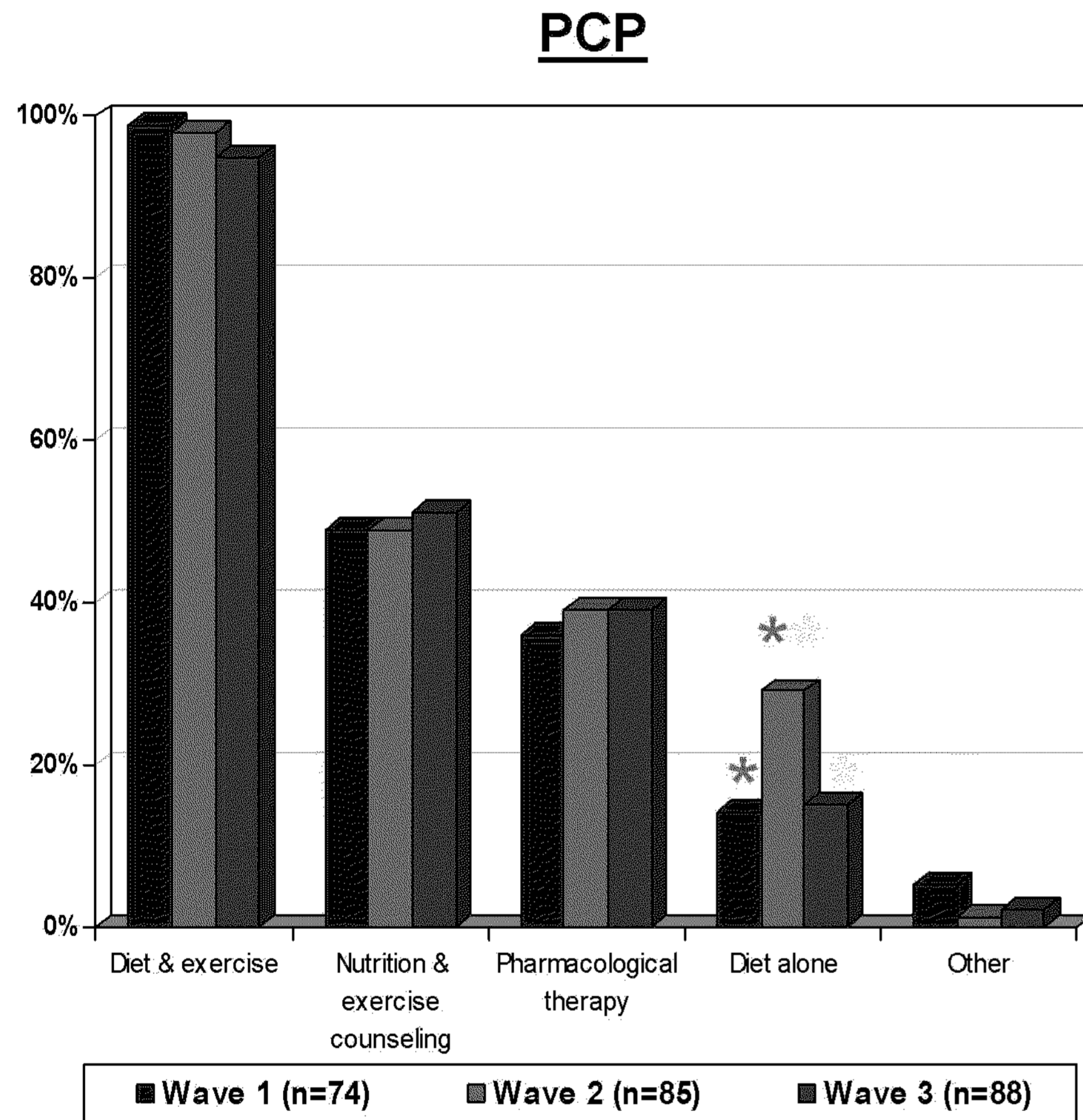


Base: Concerned about weight gain in patients that are treated with psychotropic agents

Q530 How often do you offer counseling to your patients starting psychotropic medications about healthy living, exercise, etc.?

Psychs are looking for new WG solutions

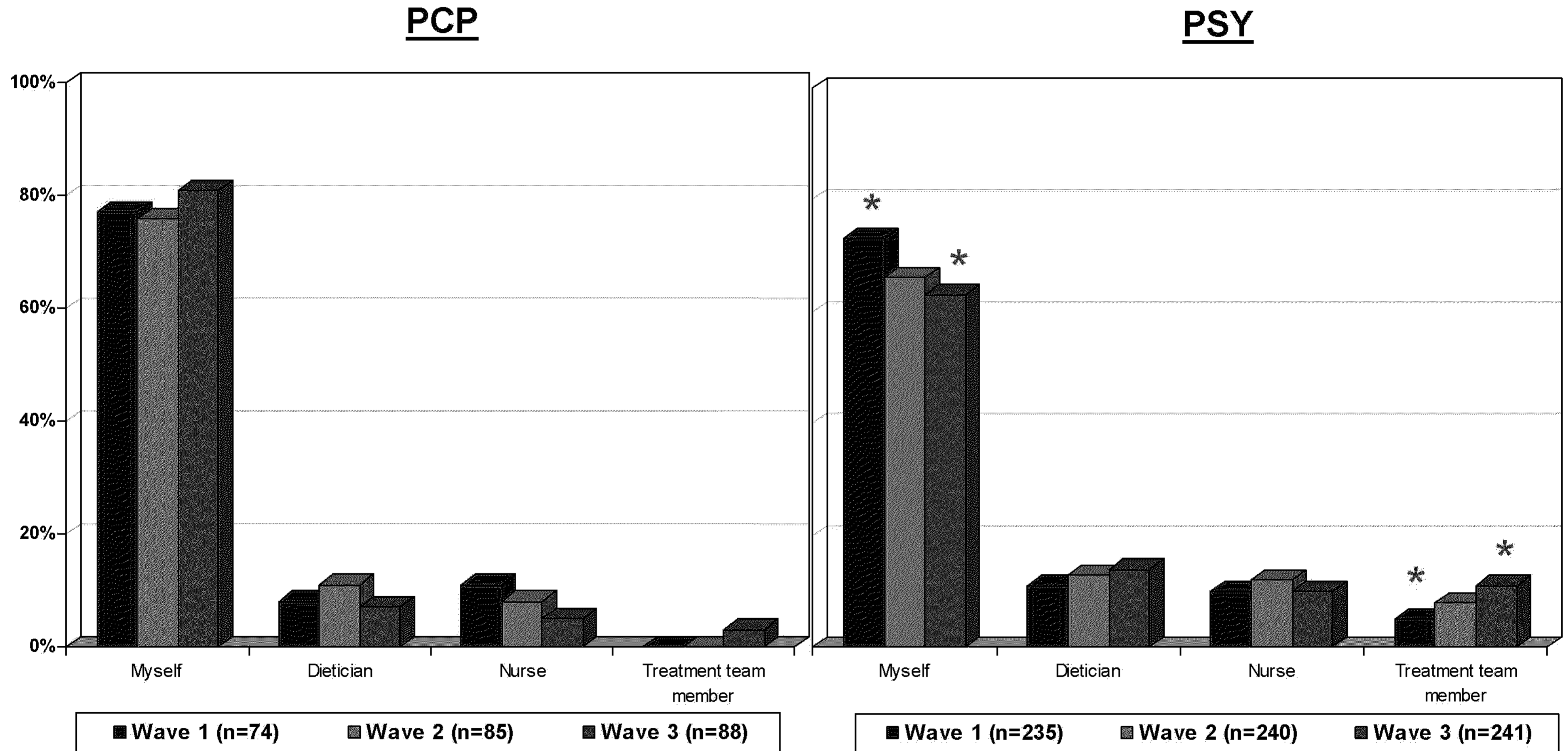
Preferred counseling or management techniques



Base: Discuss the management of weight gain with patients or offer counseling to patients starting on psychotropic medications
 Q540 What counseling or management techniques are most likely to be used in your practice setting?

Significant change in who does weight counseling

Discussion and implementation of weight gain management

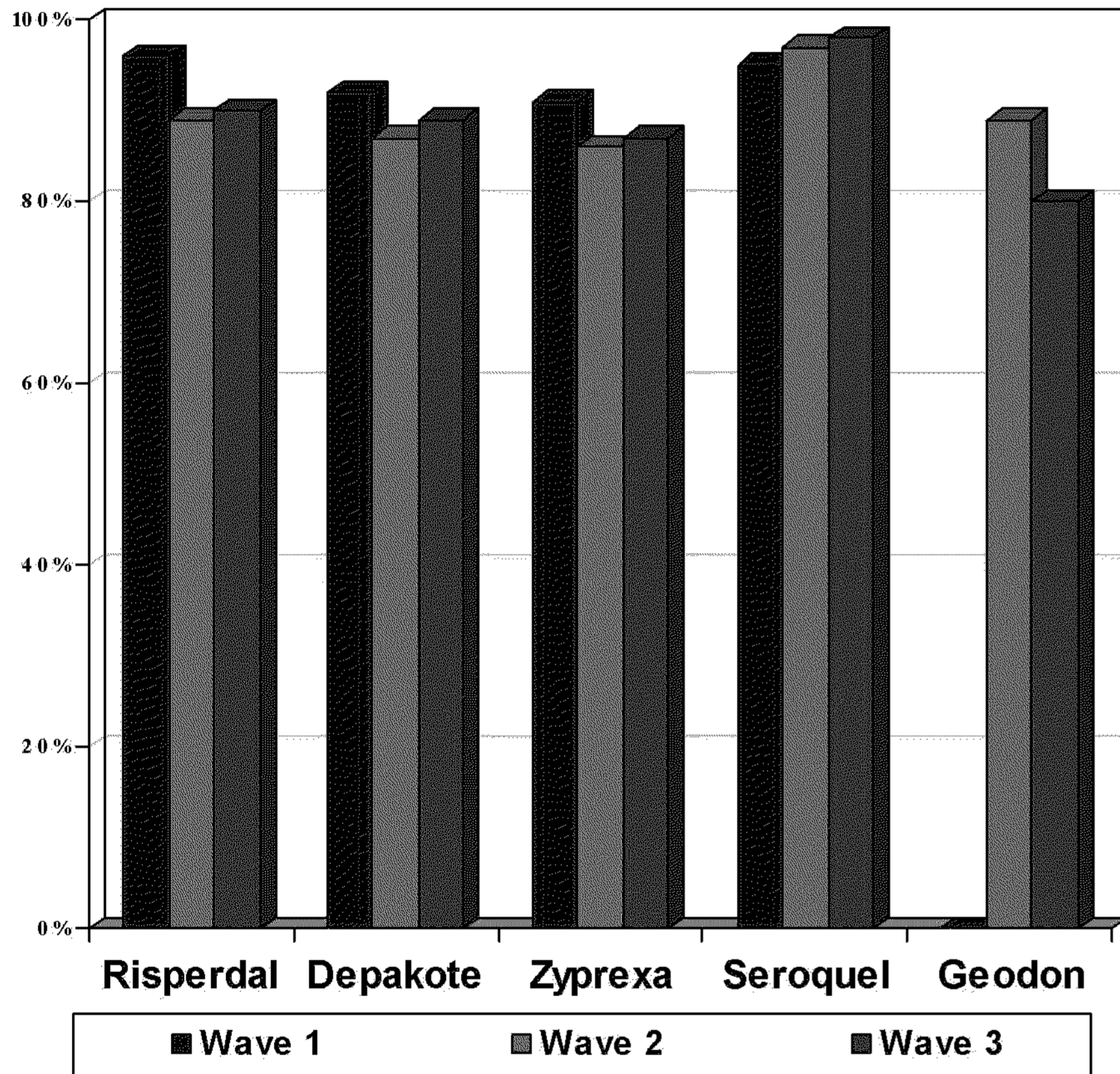


Base: Discuss the management of weight gain with patients or offer counseling to patients starting on psychotropic medications
 Q550 Within your practice setting, who is most likely to discuss and implement non-medical solutions (e.g., diet, exercise) to help manage weight gain?

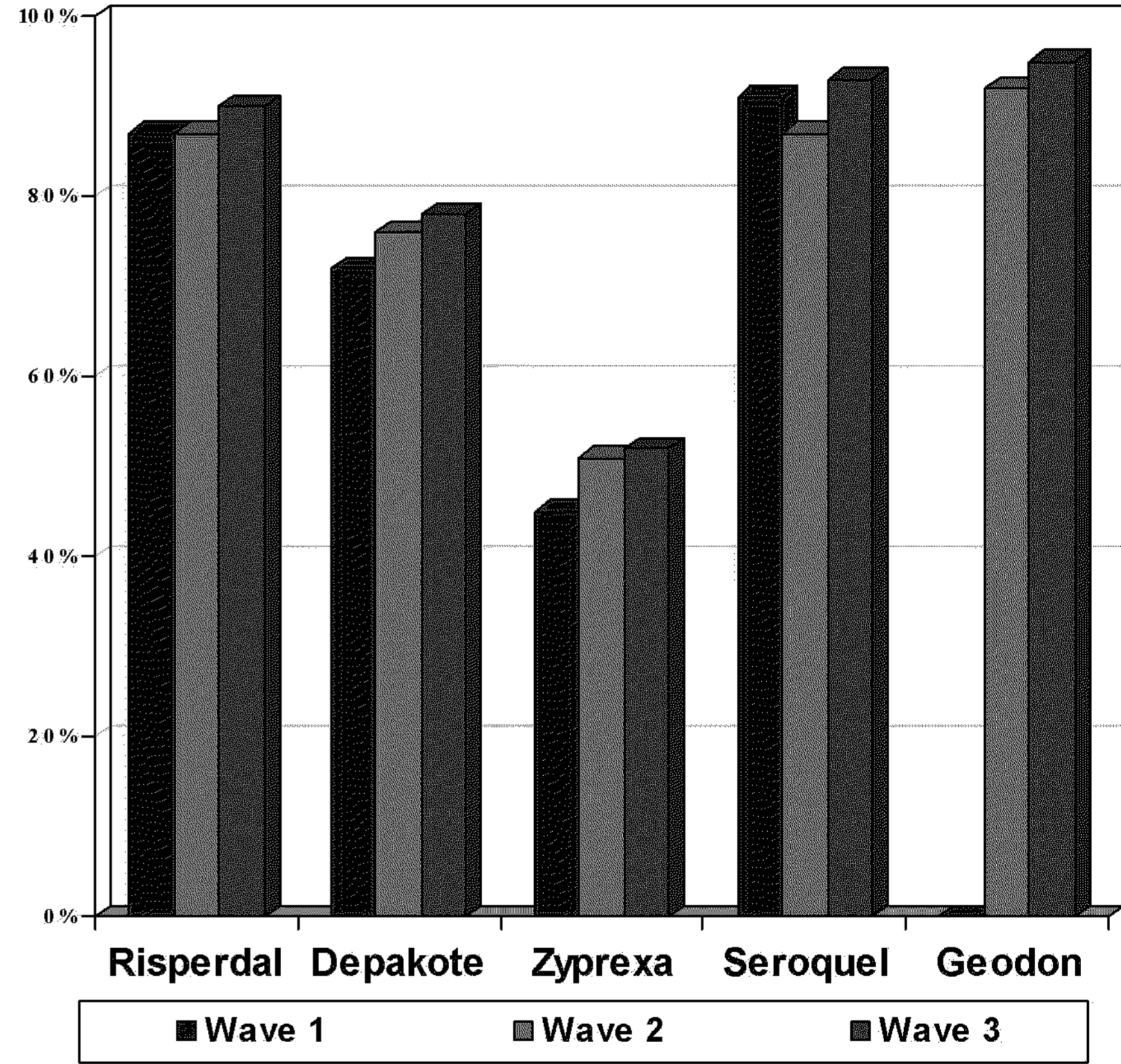
Perception of WG manageability is relatively flat

Manageability of weight gain

PCP



PSY



BASE: Prescribes medication

Q730 If a patient treated with...gains weight, is it manageable?

Next Steps

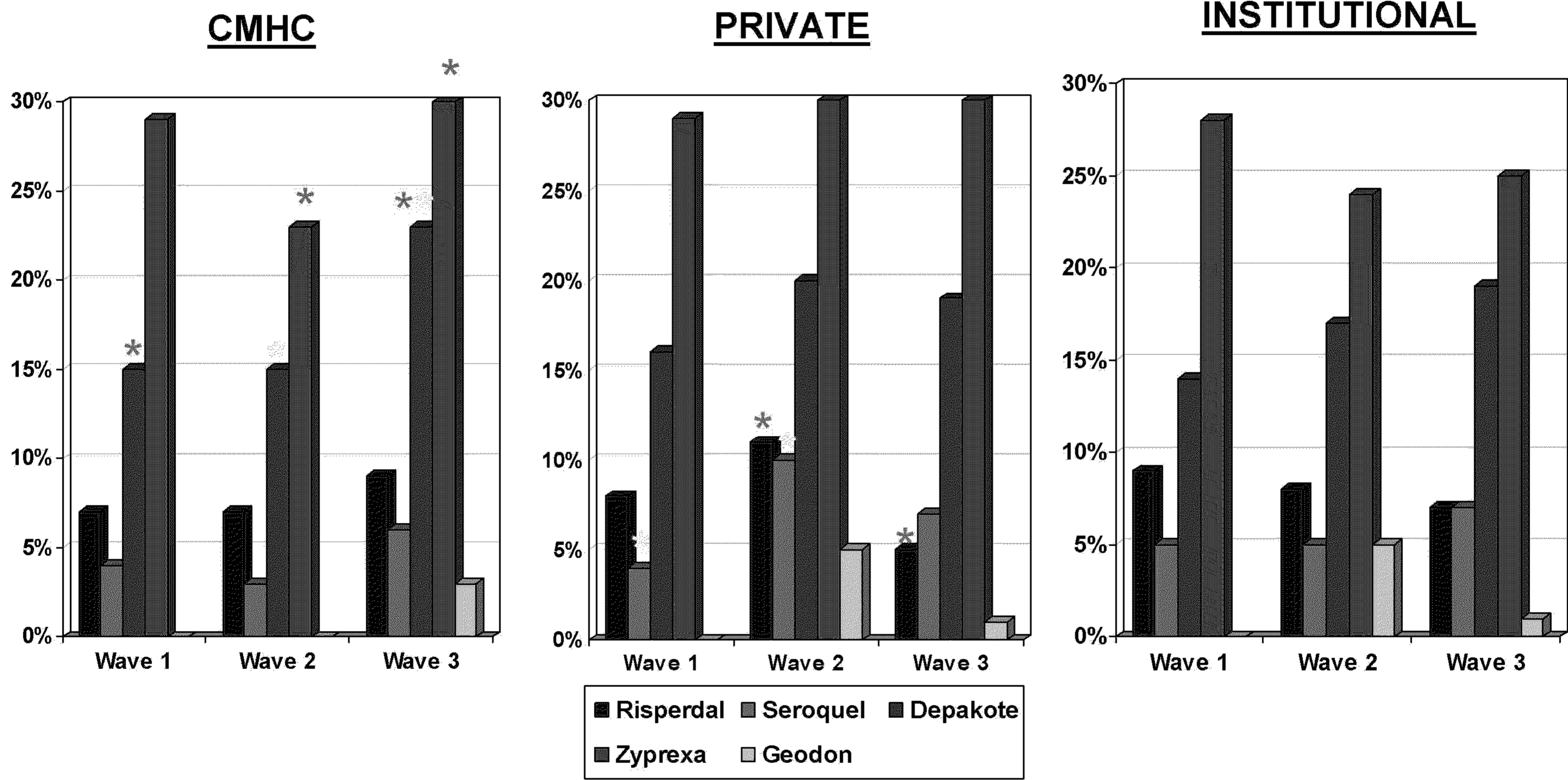
- ***Project Sagan's Fitness and Nutrition Component***
 - First wave focused on Private Practice & CMHC setting
 - Critical for enabling psychiatrists in managing patient's weight
- ***Own the weight gain issue and continue to provide our customers with solutions that matter***
 - Across all waves, the majority of respondents state they will prescribe more Zyprexa if weight gain can be managed
 - Provide MDs with better solutions – Answers That Matter
- ***Embrace our opportunity to impact MDs based upon our market segments***
 - Use learnings from linguistics study to address physicians fears and anxieties towards Zyprexa
 - Create fears for competitors' products in both psych and PCP markets

Backup Slides

Physician Setting

CMHC discontinuations are up for Zyp. & Ser.

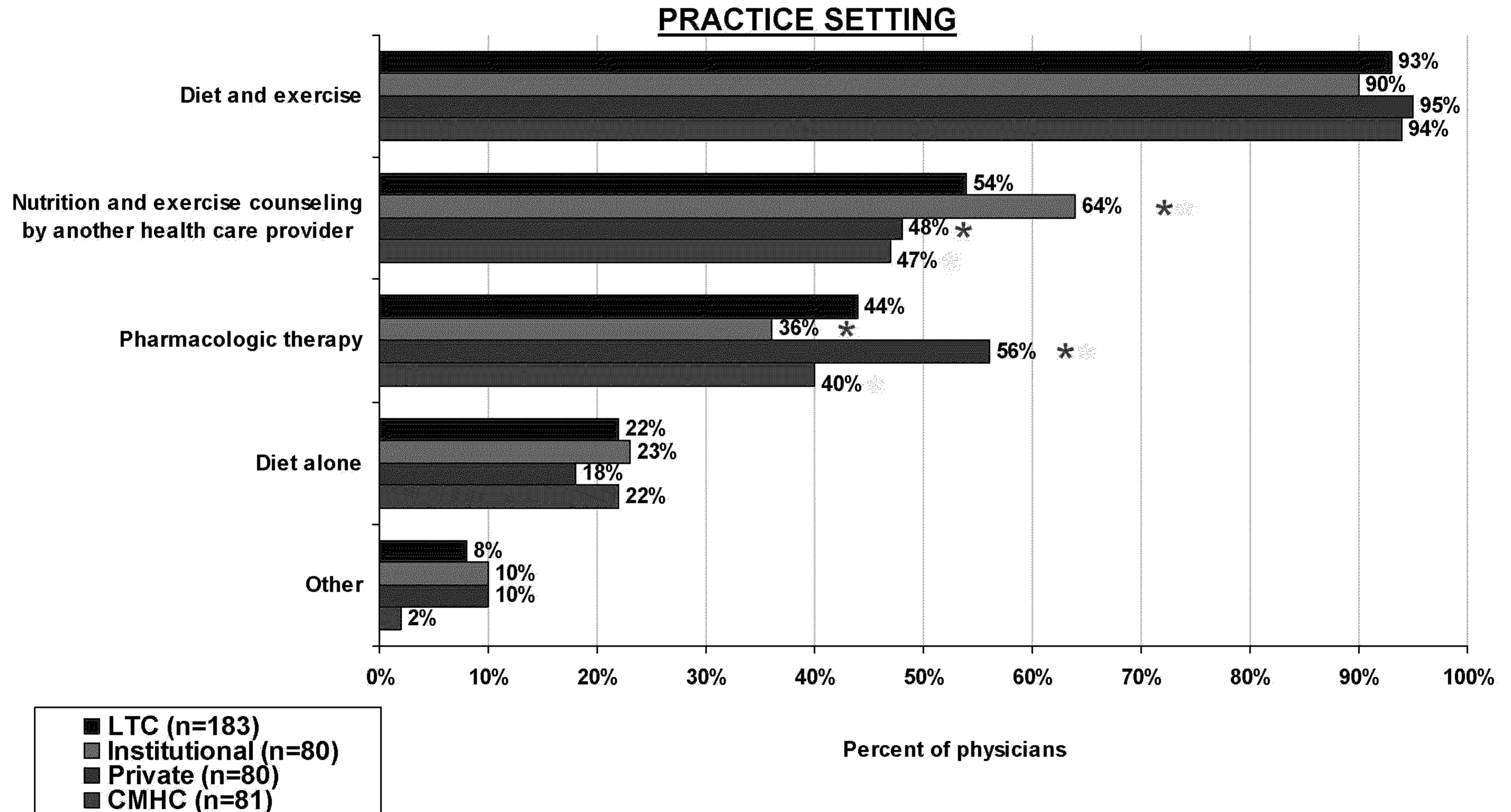
Discontinues medication due to weight gain



Base: Prescribes medication
 Q710 What percentage of the time do you discontinue use of... due to weight gain?

Various settings manage WG differently

Preferred counseling or management techniques

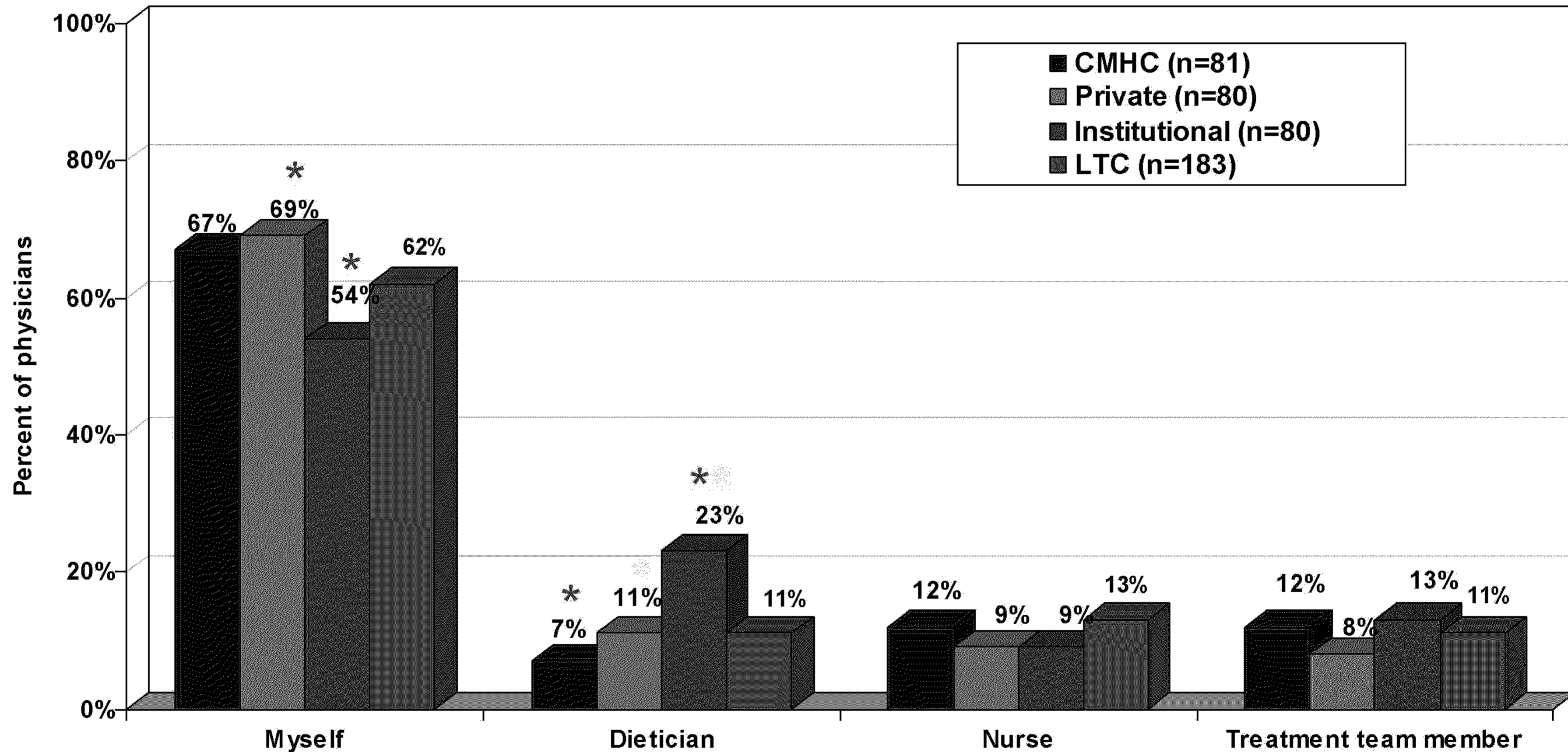


Base: Discuss the management of weight gain with patients or offer counseling to patients starting on psychotropic medications
 Q540 What counseling or management techniques are most likely to be used in your practice setting?

Institutions are using dieticians more than others

Discussion and implementation of weight gain management

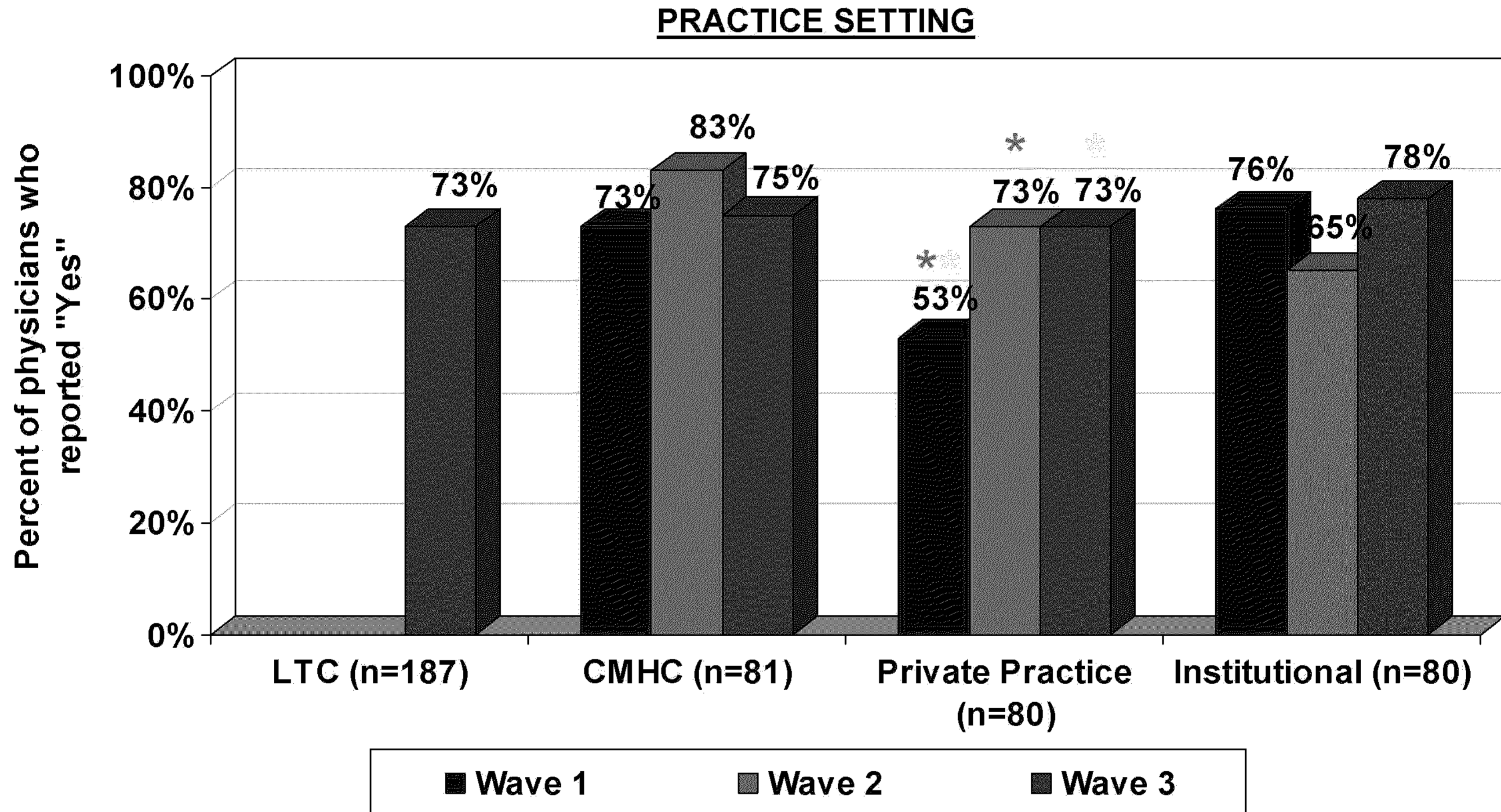
PRACTICE SETTING



Base: Discuss the management of weight gain with patients or offer counseling to patients starting on psychotropic medications
 Q550 Within your practice setting, who is most likely to discuss and implement non-medical solutions (e.g., diet, exercise) to help manage weight gain?

Hyperglycemia and Diabetes

Prevalence among the mentally ill



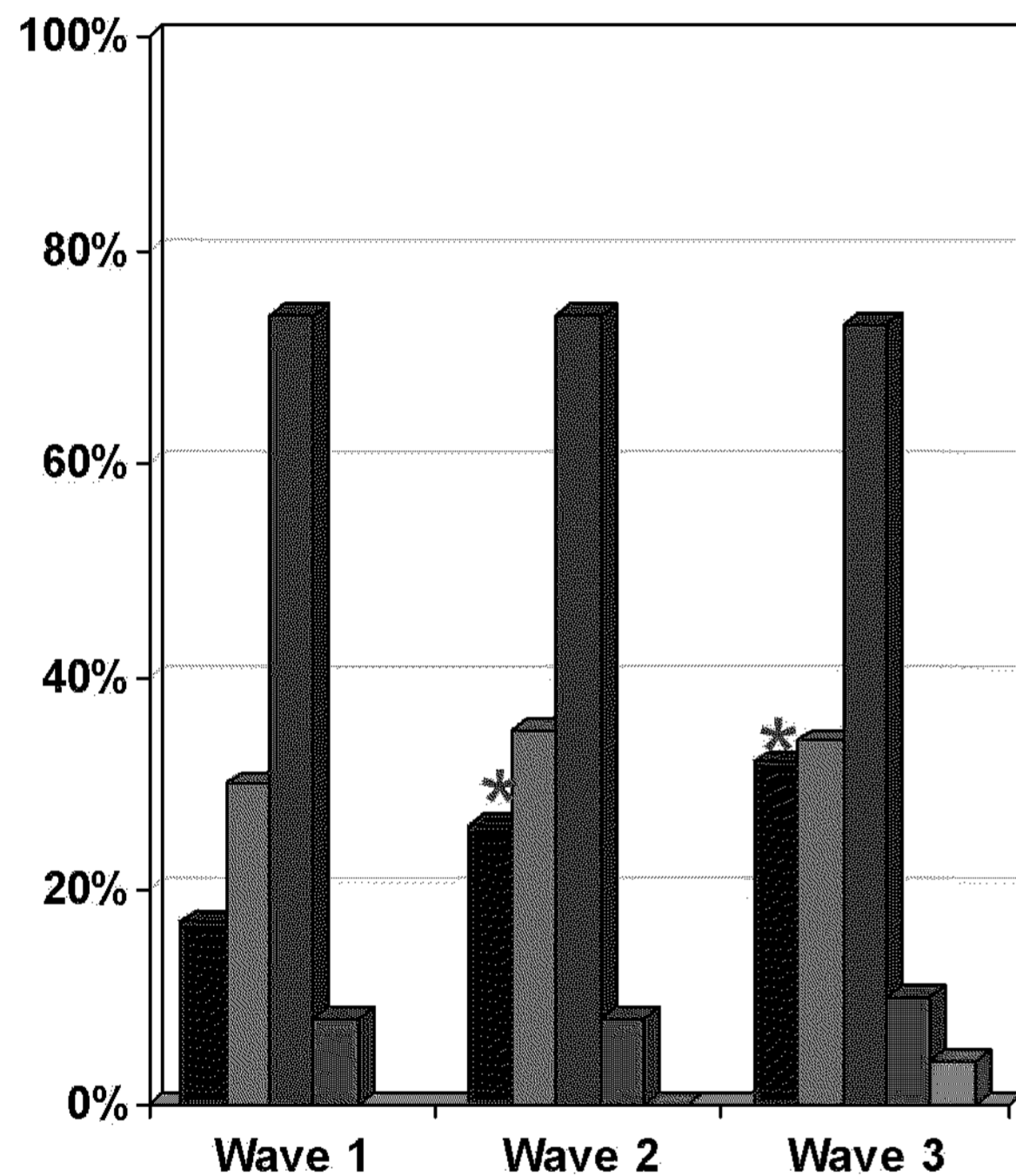
BASE: All Physicians

Q300 Do you think hyperglycemia and/or diabetes is more prevalent in patients receiving treatment for mental illness as compared to the general population?

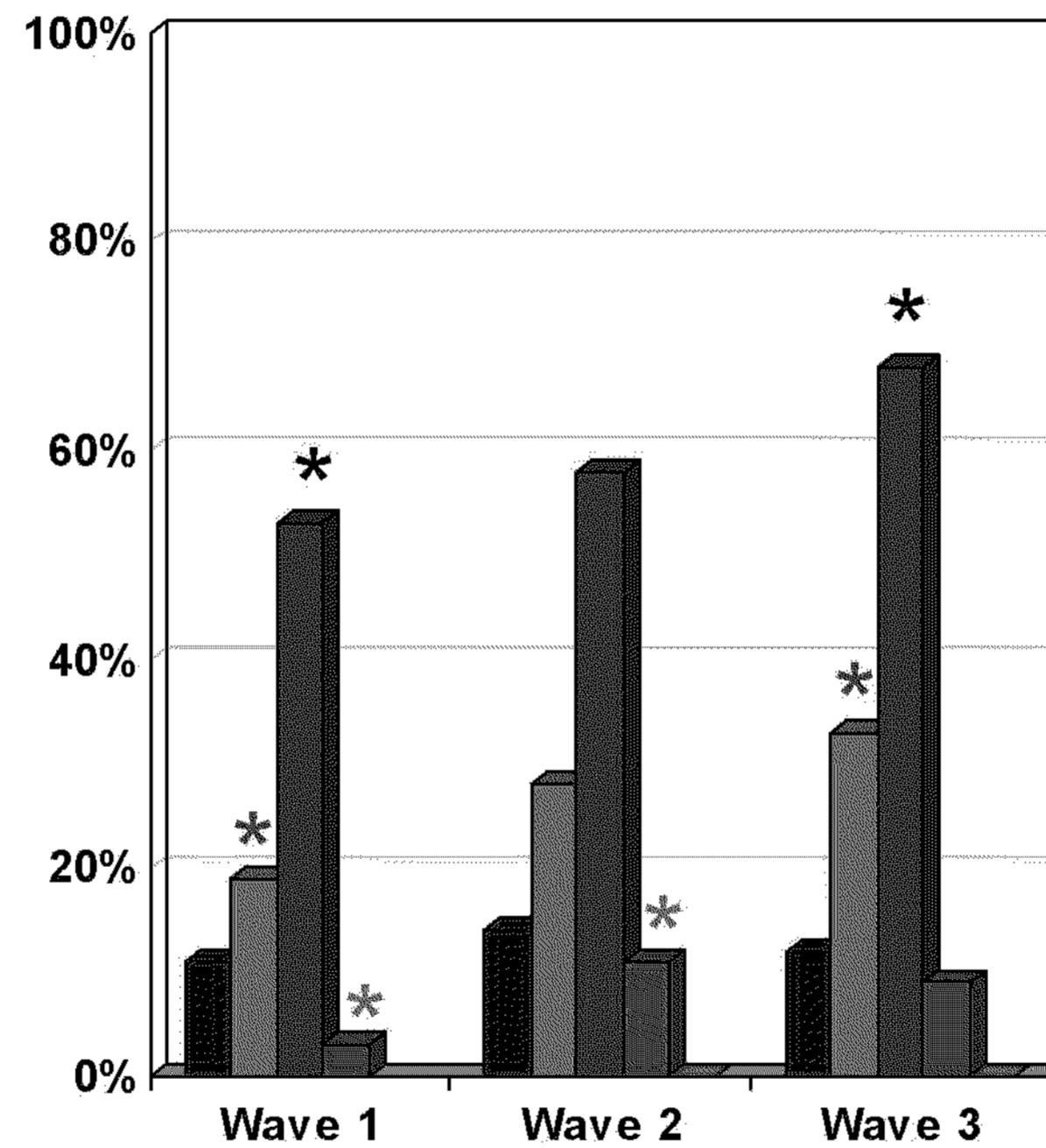
Diabetes issue worsening in private practice

Patients developing hyperglycemia/diabetes by medication

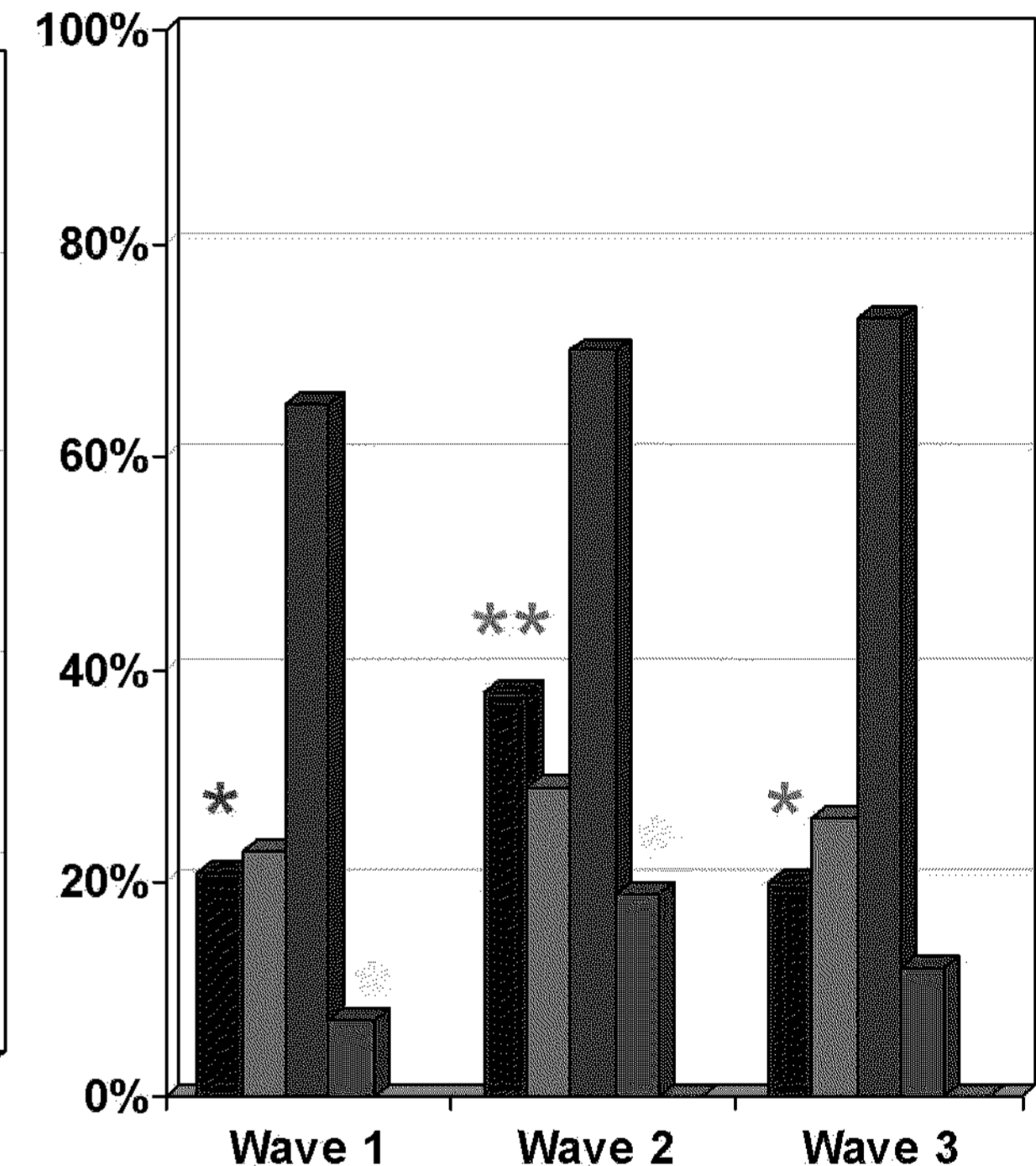
CMHC



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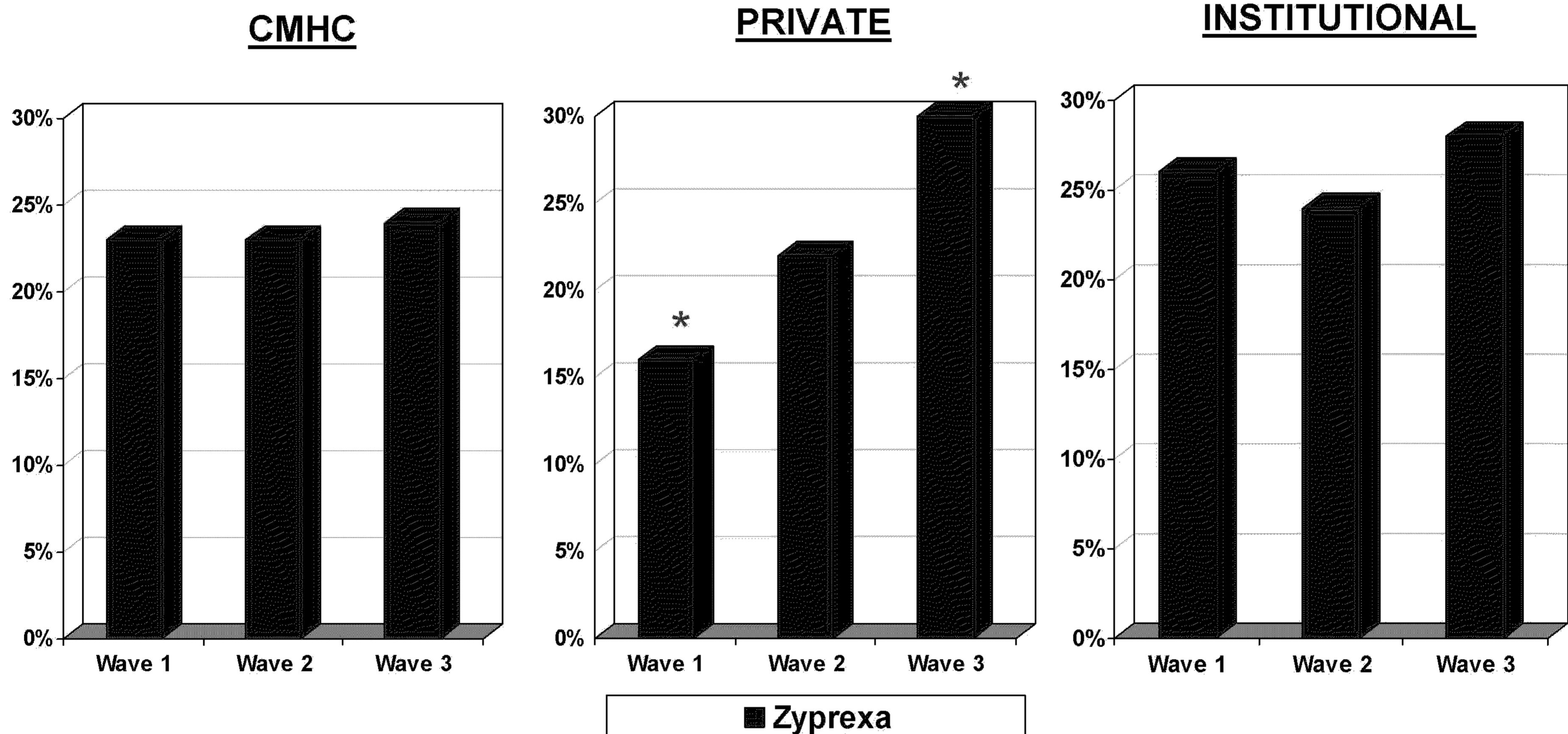


Base: Prescribes medication

Q630 Have any of your patients taking... developed hyperglycemia and/or diabetes?

Diabetes impact most dramatic in private practice

Concerns about hyperglycemia/diabetes prevents prescription



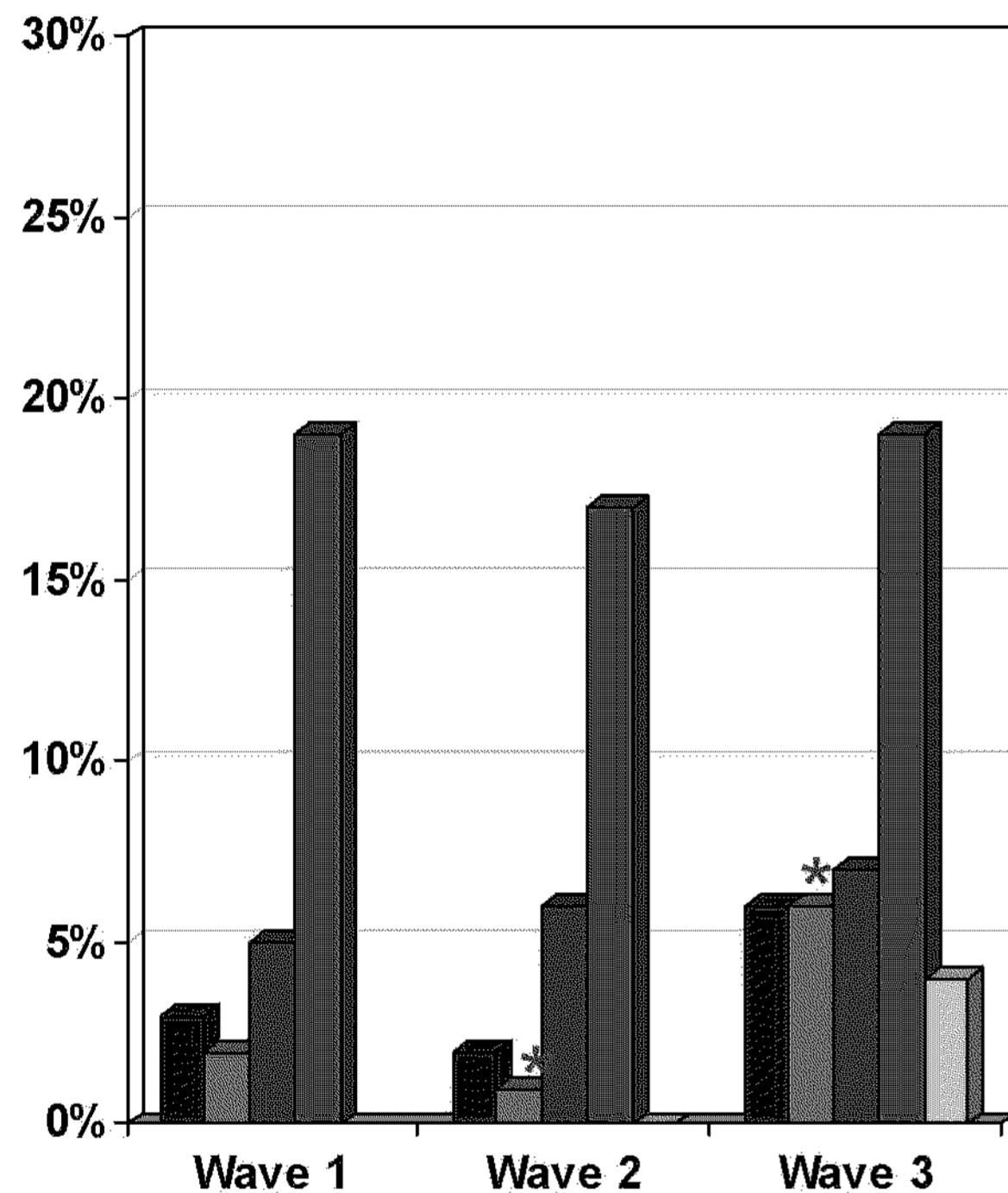
Base: Prescribes Medication

Q650 When you consider prescribing Zyprexa, what percentage of the time do you make a conscious decision not to prescribe it due to concerns about hyperglycemia and/or diabetes?

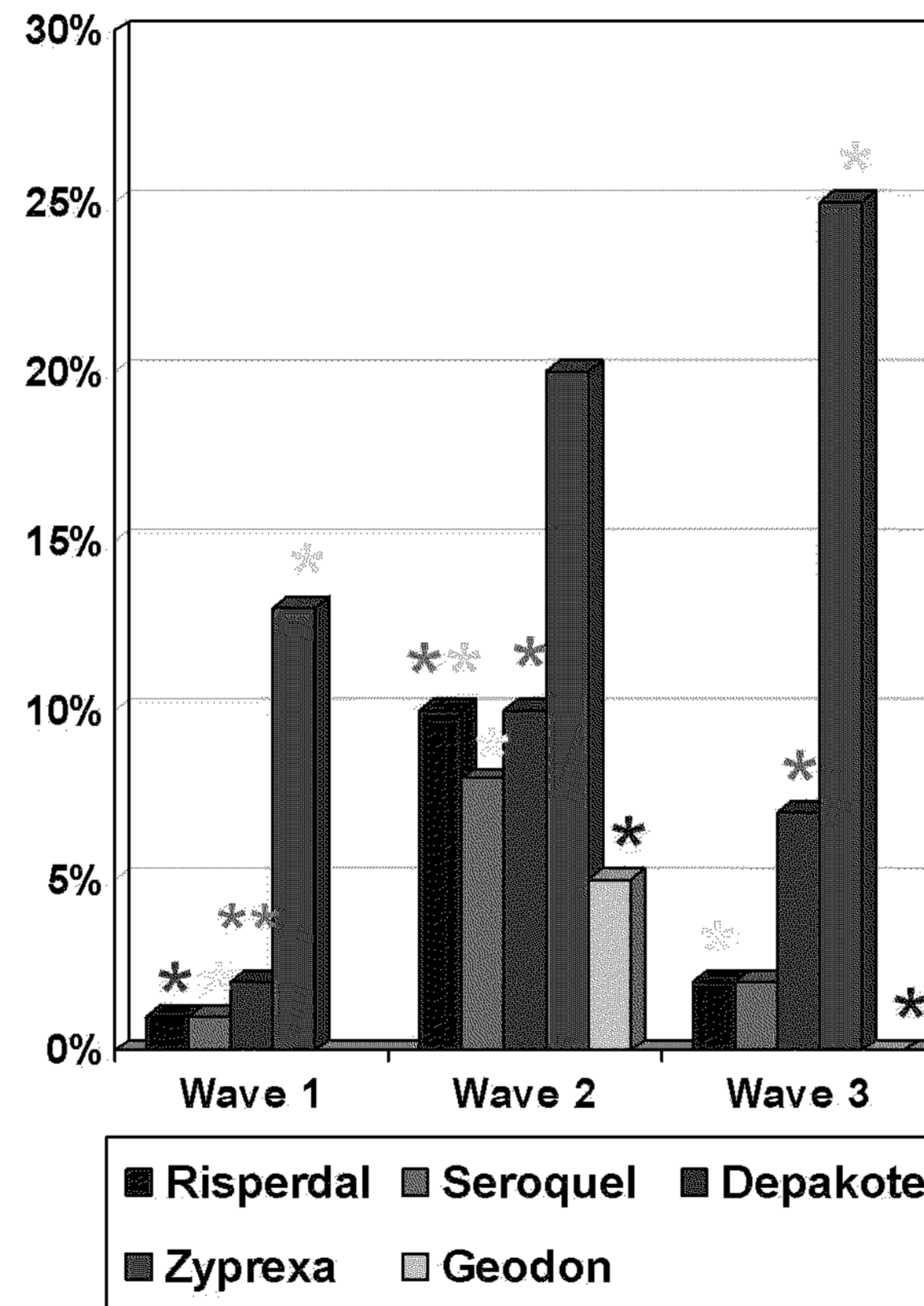
Again, private practice has the biggest change

Discontinues medication due to hyperglycemia/diabetes

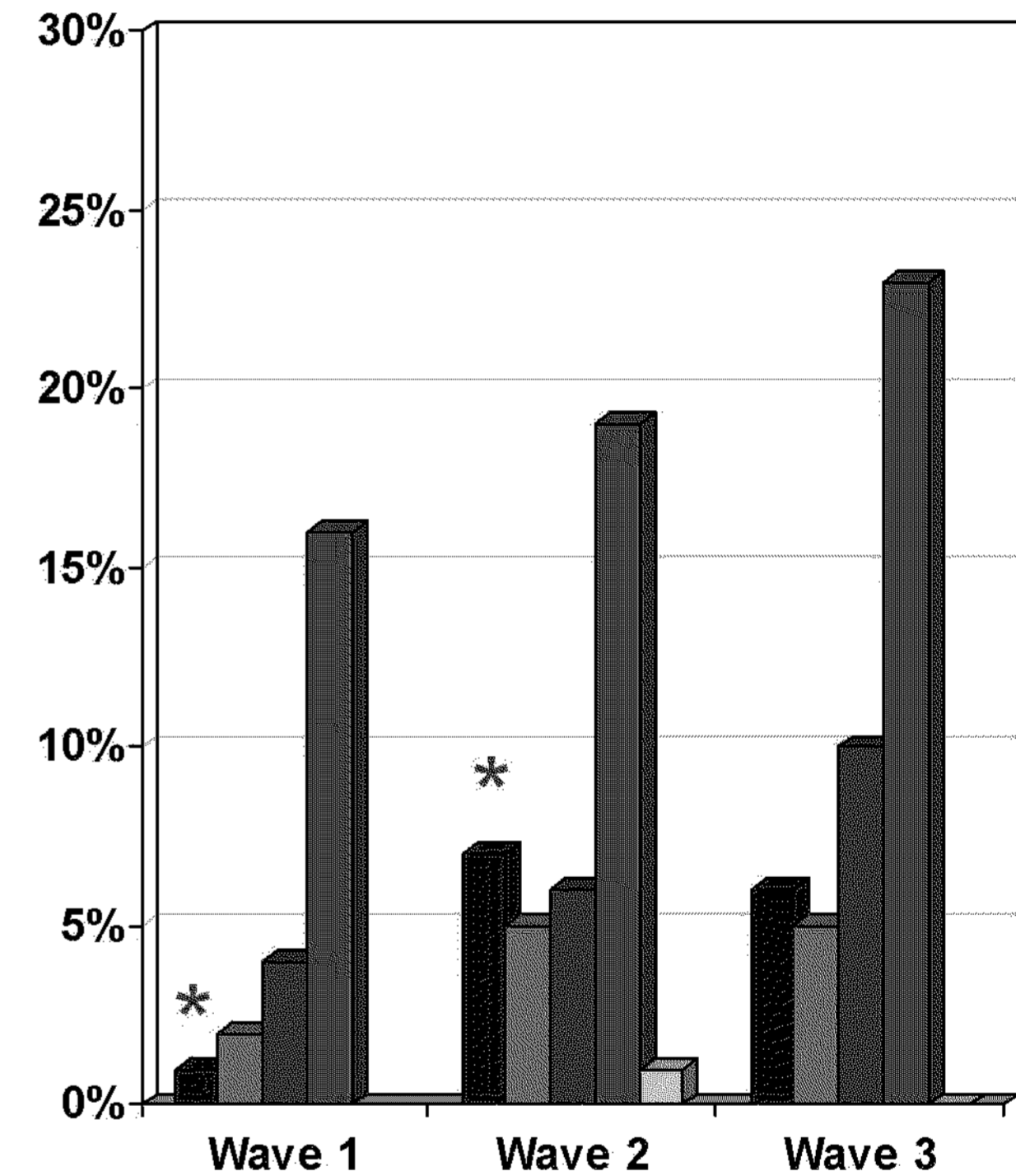
CMHC



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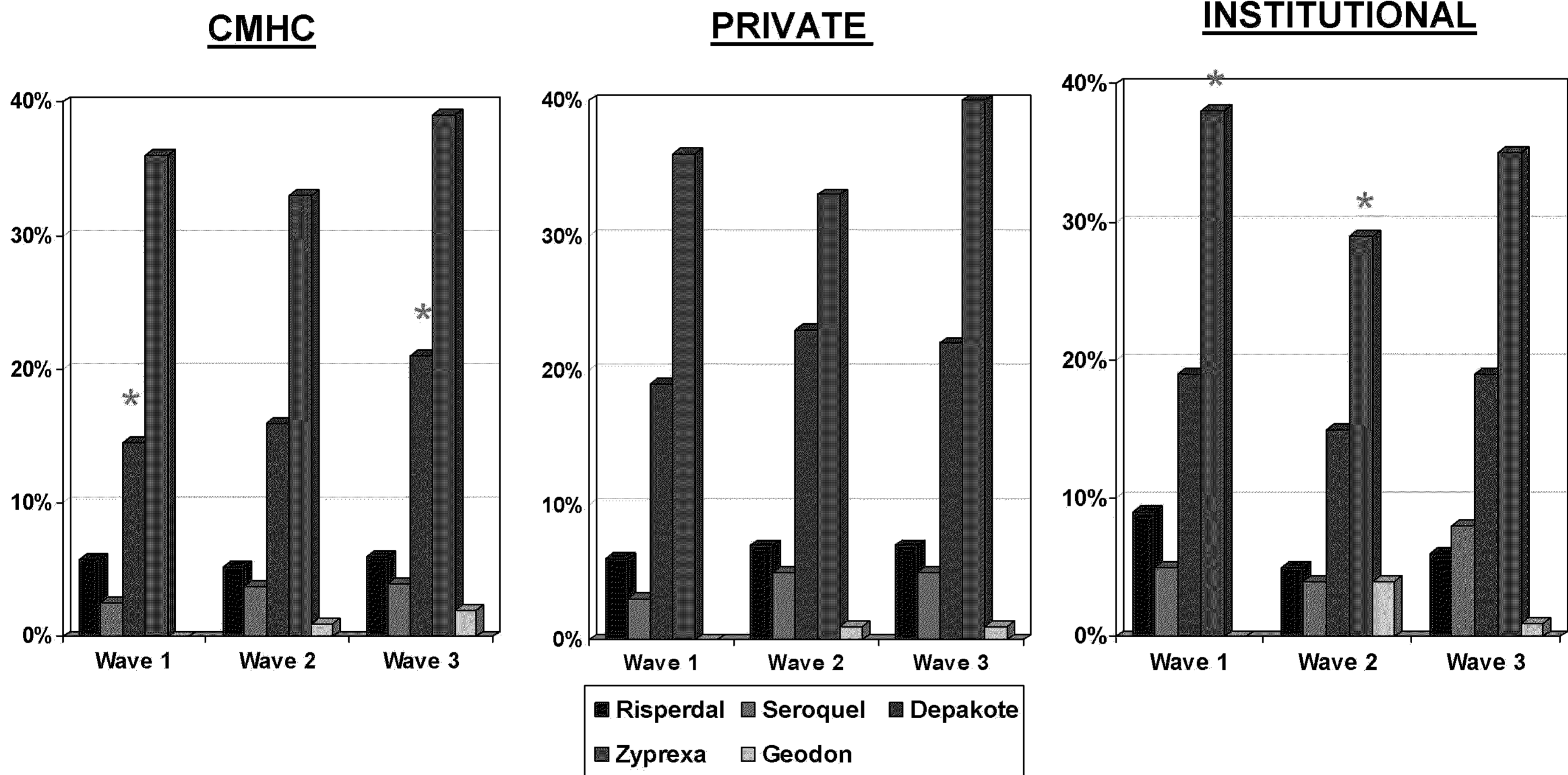


Base: Prescribes medication

Q660 What percentage of the time do you discontinue use of... due to hyperglycemia and/or diabetes?

Setting differences not as clear as with diabetes

Concerns about weight gain prevents prescription



Base: Prescribes medication

Q700 When you consider prescribing..., what percentage of the time do you make a conscious decision not to prescribe it due to concerns about weight gain?

PCPs & Psychs avoid overweight patients more often

Patient types to avoid - Overweight

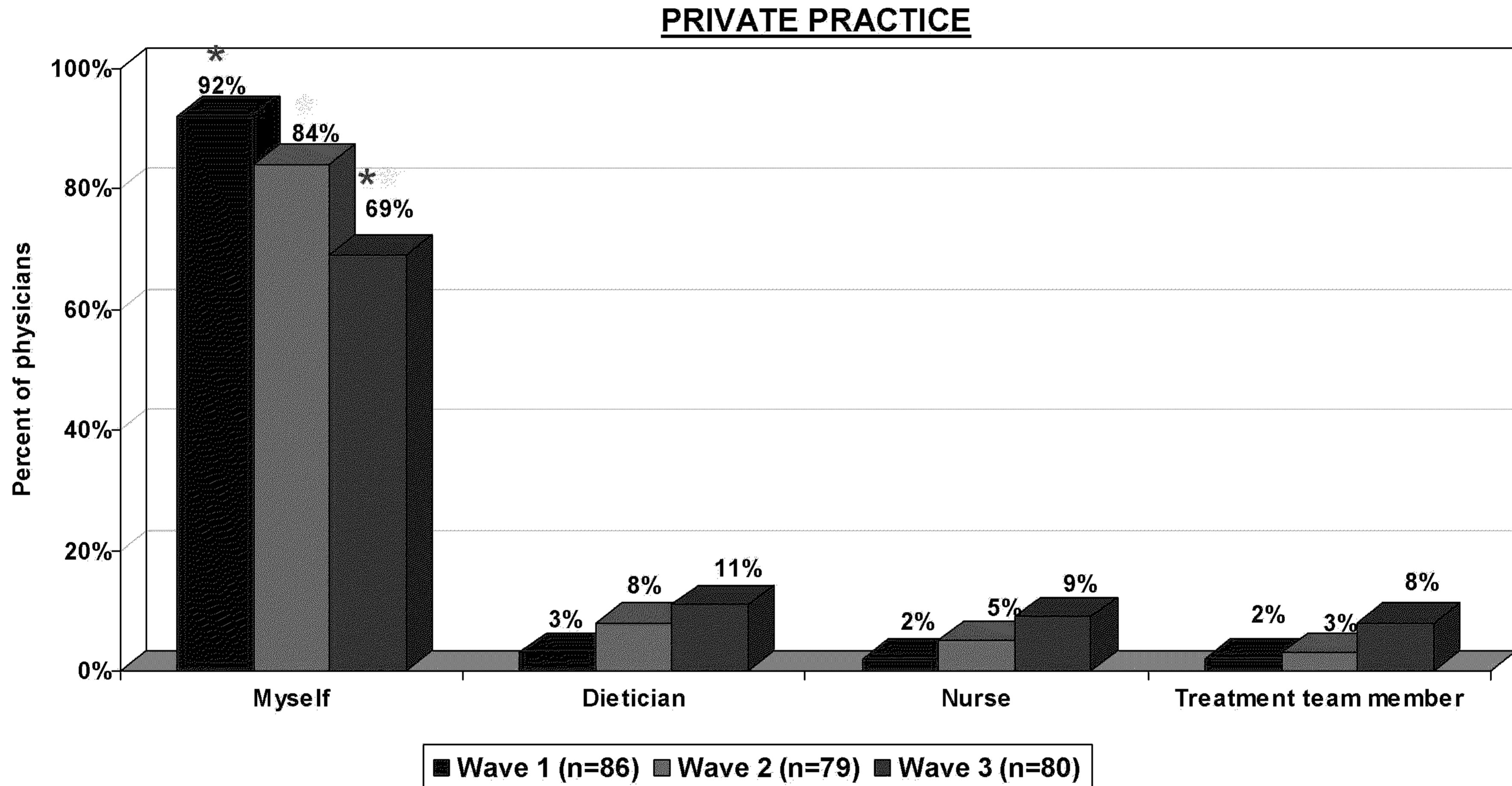
	PCP			PSY		
	Wave 1	Wave 2	Wave 3	Wave 1	Wave 2	Wave 3
	Overweight					
Risperdal	(n=71) 18%	(n=87) 16%	(n=93) 23%	(n=232) 12%*	(n=240) 15%	(n=237) 19%*
Seroquel	(n=21) 5%	(n=29) 14%	(n=40) 25%	(n=222) 9%	(n=223) 11%	(n=236) 14%
Depakote	(n=73) 11%	(n=86) 20%	(n=89) 16%	(n=232) 48%	(n=238) 41%*	(n=234) 54%*
Zyprexa	(n=64) 14%*	(n=74) 24%	(n=87) 31%*	(n=234) 75%	(n=238) 70%*	(n=240) 80%*
Geodon	(n=0)	(n=9) 11%	(n=10) 40%	(n=0)	(n=165) 5%	(n=197) 4%

Base: Prescribes medication

Q720 When choosing to prescribe..., which of the following patient types are you most likely to avoid?

Private practice using other resources more often

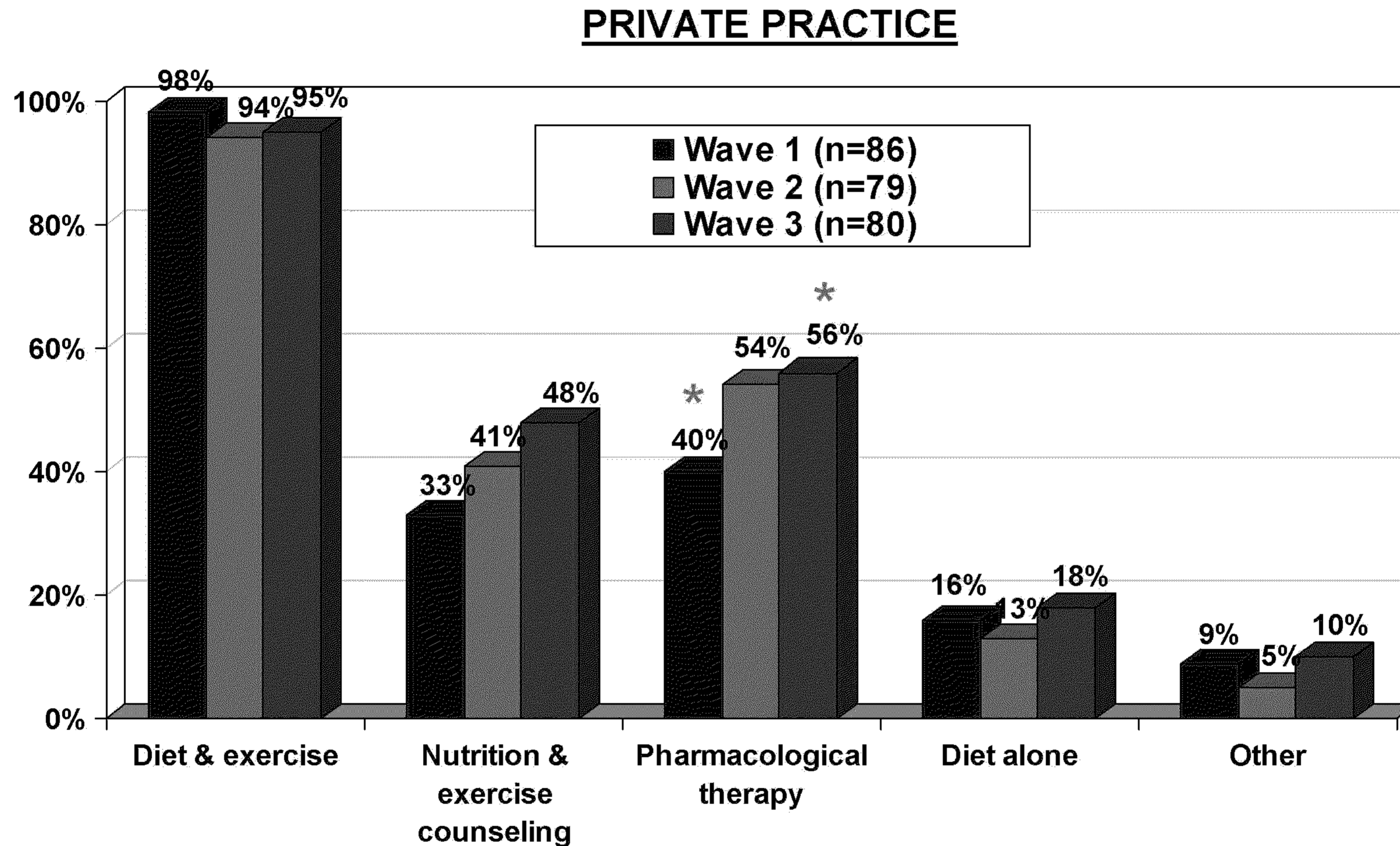
Discussion and implementation of weight gain management



Base: Discuss the management of weight gain with patients or offer counseling to patients starting on psychotropic medications
 Q550 Within your practice setting, who is most likely to discuss and implement non-medical solutions (e.g., diet, exercise) to help manage weight gain?

Private practice psychs look for new WG solutions

Preferred counseling or management techniques - Private Practice



Base: Discuss the management of weight gain with patients or offer counseling to patients starting on psychotropic medications
 Q540 What counseling or management techniques are most likely to be used in your practice setting?

PCPs see more WG overall – Zyprexa most significantly

Target medications and weight fluctuations (continued)

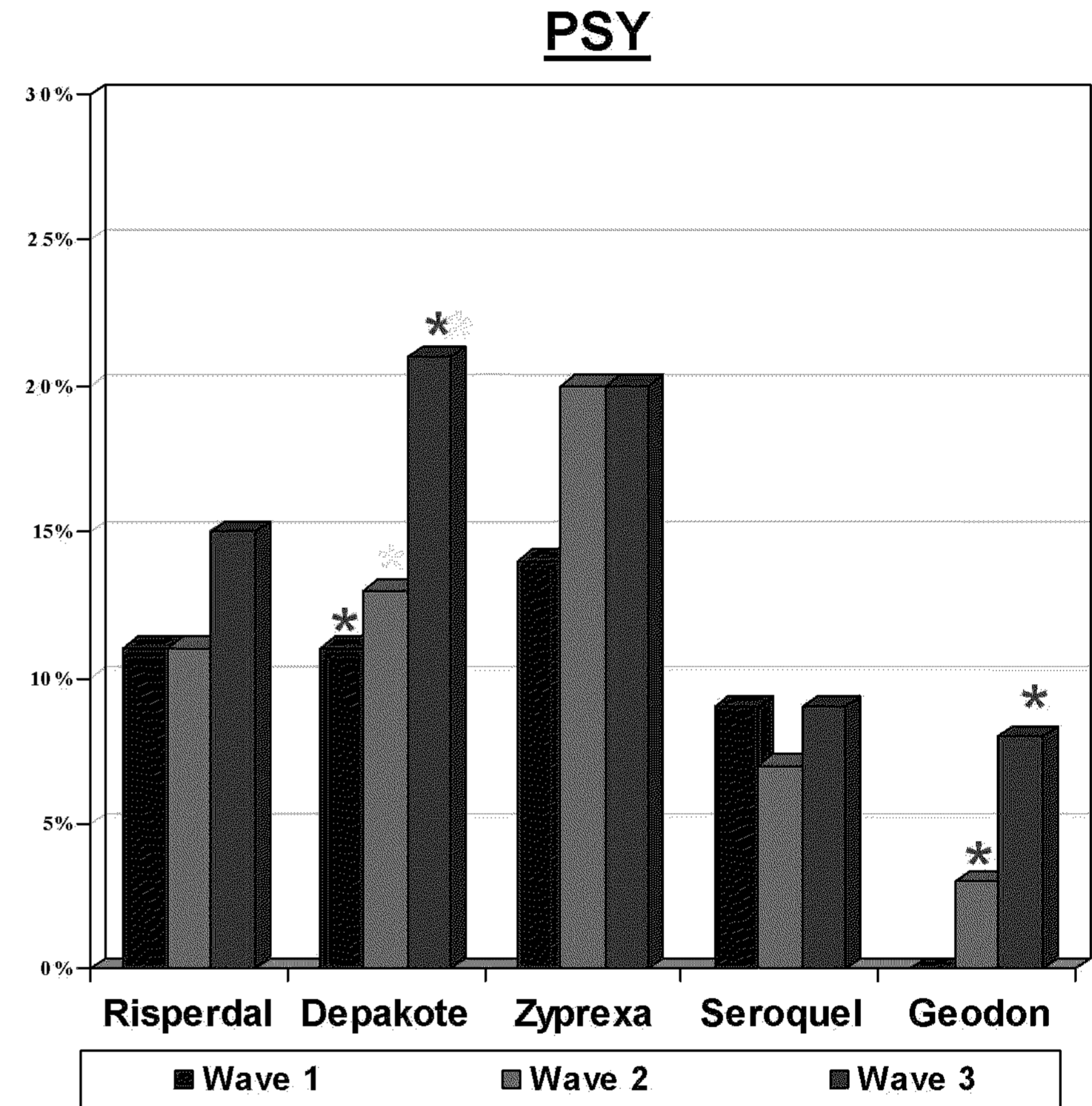
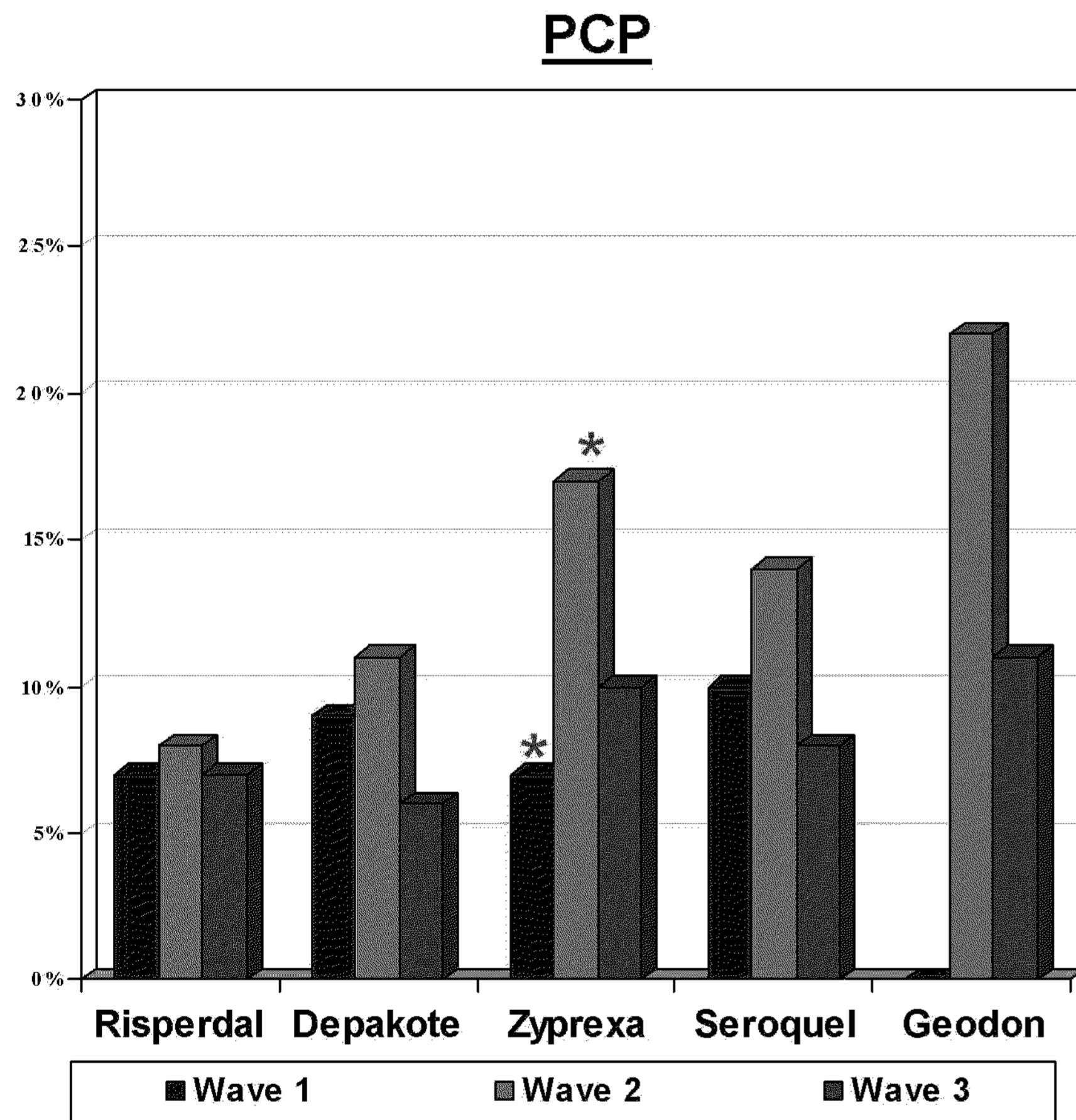
	PCP			PSY		
	Wave 1	Wave 2	Wave 3	Wave 1	Wave 2	Wave 3
<i>Gain weight</i>						
Risperdal	(n=71) 25.8%	(n=87) 27.5%	(n=93) 33.1%	(n=232) 37.8%	(n=240) 37.1%	(n=237) 34.1%
Seroquel	(n=21) 21.2%	(n=29) 25.3%	(n=40) 25.7%	(n=222) 25.9%	(n=223) 26.8%	(n=236) 24.1%
Depakote	(n=73) 26.3%	(n=86) 30.9%	(n=89) 34.2%	(n=232) 54.5%	(n=238) 53.8%	(n=234) 54.5%
Zyprexa	(n=64) 25.9%*	(n=74) 33.9%	(n=87) 36.8%*	(n=234) 70.4%	(n=238) 68.8%	(n=240) 67.4%
Geodon	(n=0)	(n=9) 6.7%	(n=10) 25.2%	(n=0)	(n=165) 10.4%	(n=197) 9.2%

Base: Prescribes medication

Q671 What percentage of your patients receiving... lose weight, have no change in weight, gain weight?

Increased usage of Dpk & Geodon weight loss drugs

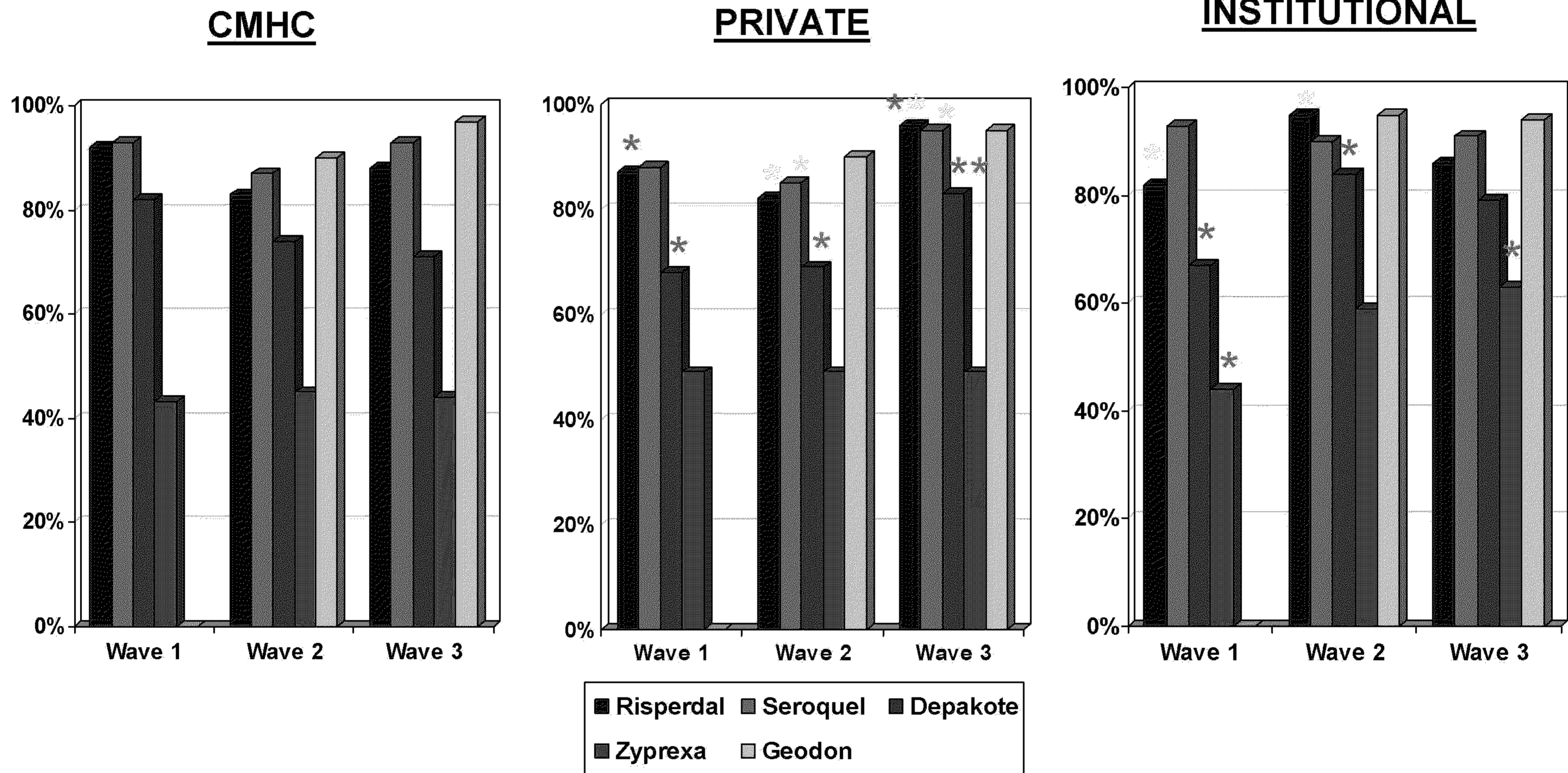
Other medications to manage weight gain



Base: Weight gain is manageable for patients treated with medication
 Q750 Do you currently use additional medications to manage weight gain occurring with...?

Zyprexa improving in institution – others up in PP

Manageability of weight gain



BASE: Prescribes medication

Q730 If a patient treated with...gains weight, is it manageable?

More switching in institution for Risp., Ser., & Dpk.

Weight gain management

	CMHC			Private			Institutional		
	Wave 1	Wave 2	Wave 3	Wave 1	Wave 2	Wave 3	Wave 1	Wave 2	Wave 3
RISPERDAL	(n=70)	(n=67)	(n=71)	(n=74)	(n=65)	(n=73)	(n=58)	(n=76)	(n=69)
Diet/exercise/nutritional counseling	86%	94%	92%	80%	86%	77%	93%*	83%	78%*
Changes in medication	19%	15%	10%	22%	18%	25%	9%	18%	20%
Weight gain a non-issue	4%	0%	1%	8%	5%	1%	9%	5%	3%
SEROQUEL	(n=69)	(n=67)	(n=75)	(n=70)	(n=62)	(n=73)	(n=63)	(n=66)	(n=71)
Diet/exercise/nutritional counseling	83%	82%	83%	74%	84%	77%	90%**	74%*	68%*
Changes in medication	13%	10%	12%	14%	13%	16%	10%	12%	15%
Weight gain a non-issue	12%	4%	11%	14%	6%	12%	10%	14%	7%
DEPAKOTE	(n=63)	(n=60)	(n=57)	(n=58)	(n=54)	(n=63)	(n=47)	(n=66)	(n=62)
Diet/exercise/nutritional counseling	86%	90%	89%	84%	91%	81%	94%*	88%	81%*
Changes in medication	19%	27%	28%	34%	28%	27%	11%*	20%*	37%**
Counseling on behavioral/lifestyle changes	3%	2%	0%	3%	4%	2%	13%	5%	5%

Base: Weight gain is manageable for patients treated with specified medication.
Q740 How do you currently manage weight gain with ...?

Less Zyprexa switching in CMHC

Weight gain management

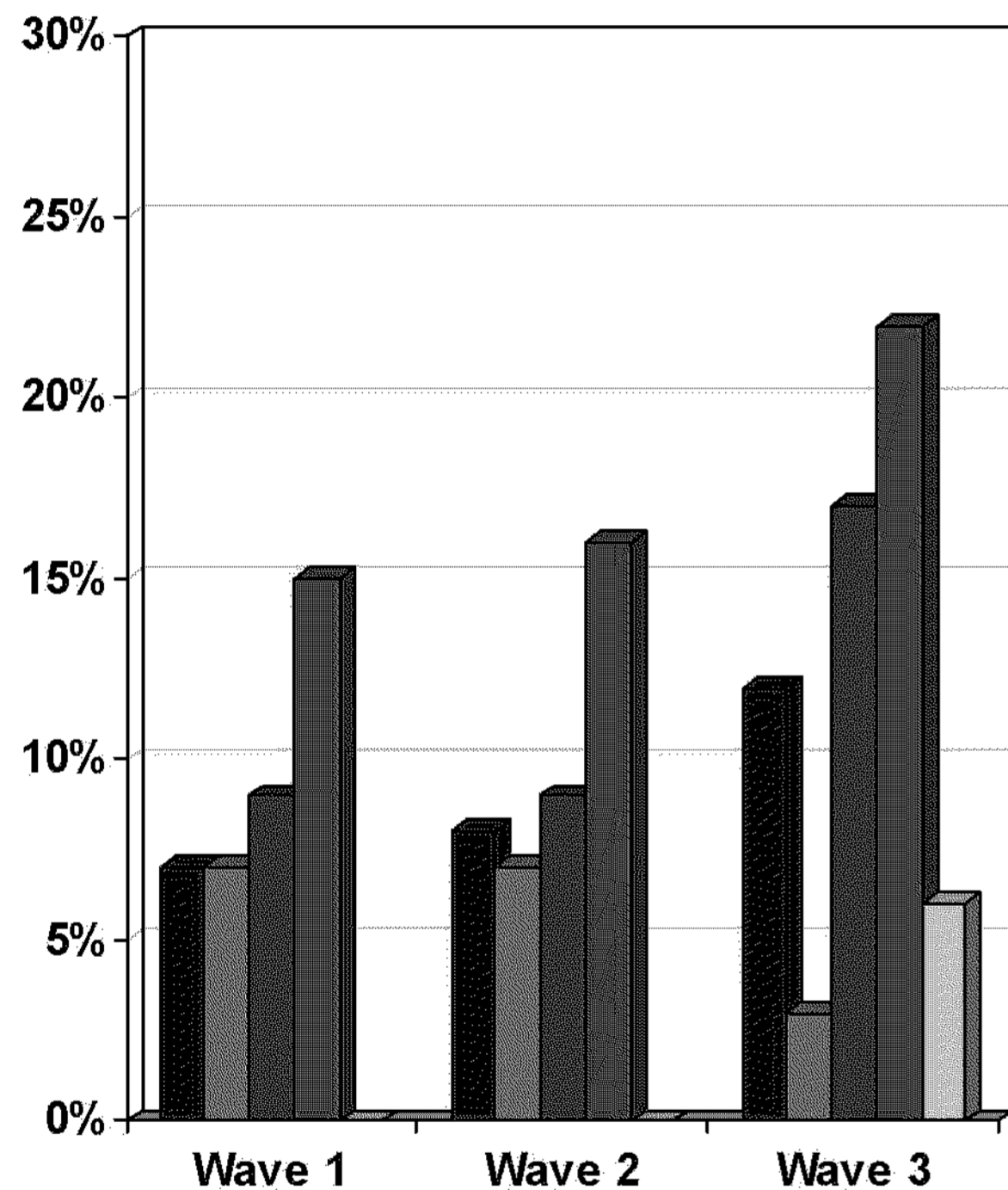
	CMHC			Private			Institutional		
	Wave 1	Wave 2	Wave 3	Wave 1	Wave 2	Wave 3	Wave 1	Wave 2	Wave 3
ZYPREXA	(n=33)	(n=36)	(n=36)	(n=42)	(n=39)	(n=39)	(n=31)	(n=47)	(n=50)
Diet/exercise/nutritional counseling	88%	94%	89%	86%	92%	79%	94%	83%	84%
Changes in medication	36%	47%*	25%*	36%	28%	31%	19%*	43%*	34%
Counseling on Behavioral/lifestyle changes	6%	3%	3%	10%	5%	3%	19%	4%	2%
GEODON	(n=0)	(n=46)	(n=72)	(n=0)	(n=52)	(n=58)	(n=0)	(n=53)	(n=58)
Diet/exercise/nutritional counseling	N/A	61%	75%	N/A	65%	74%	N/A	64%	62%
Weight gain a non-issue	N/A	22%	18%	N/A	19%	16%	N/A	26%	17%
Changes in medication	N/A	7%	6%	N/A	6%	12%	N/A	2%	12%

Base: Weight gain is manageable for patients treated with specified medication.
Q740 How do you currently manage weight gain with ...?

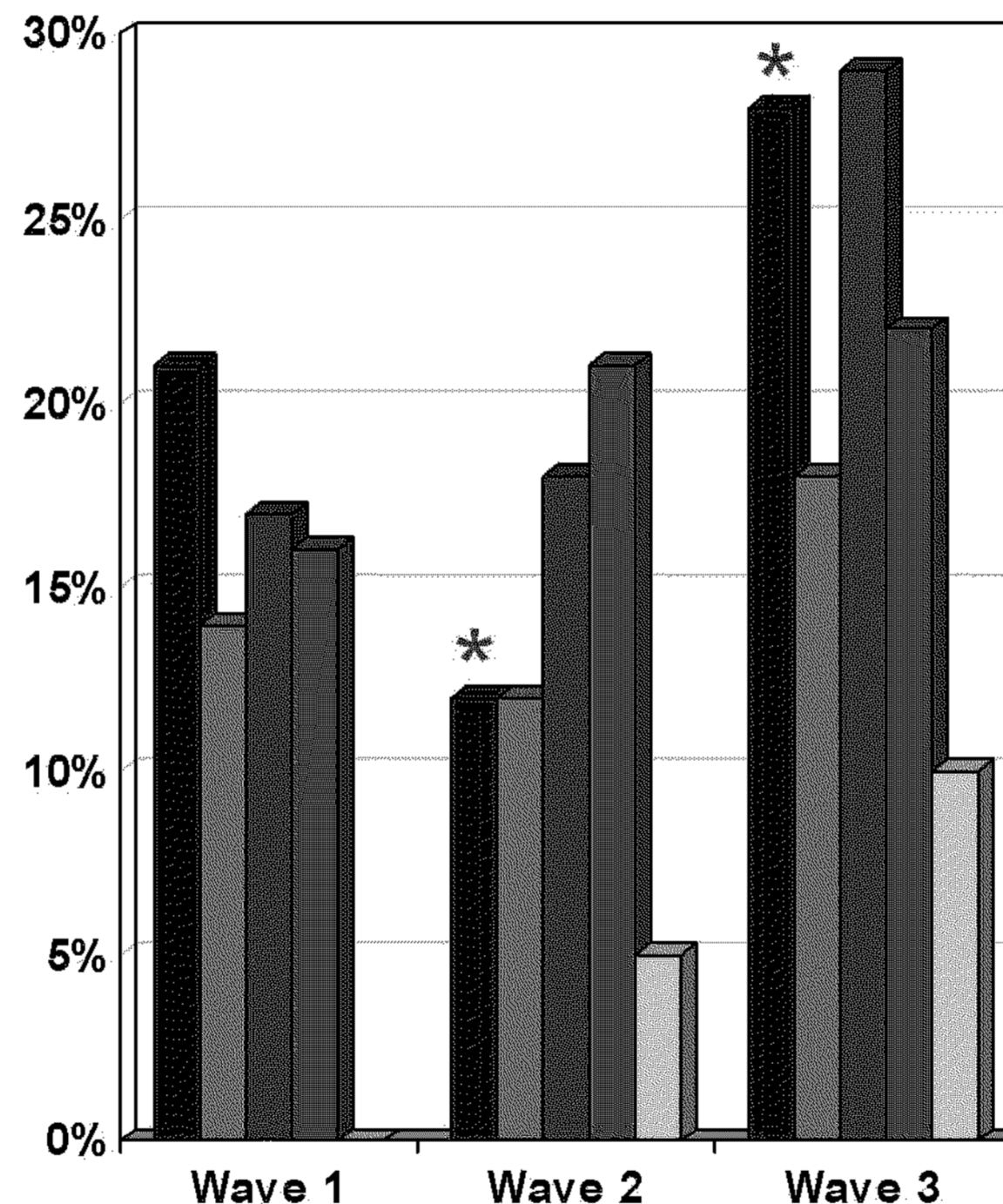
PP sees largest increase in weight loss drug usage

Other medications to manage weight gain

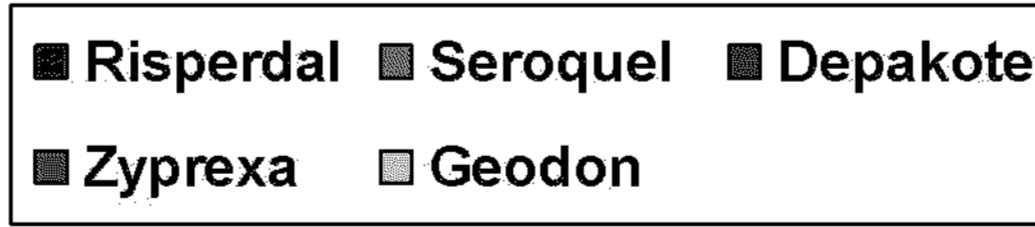
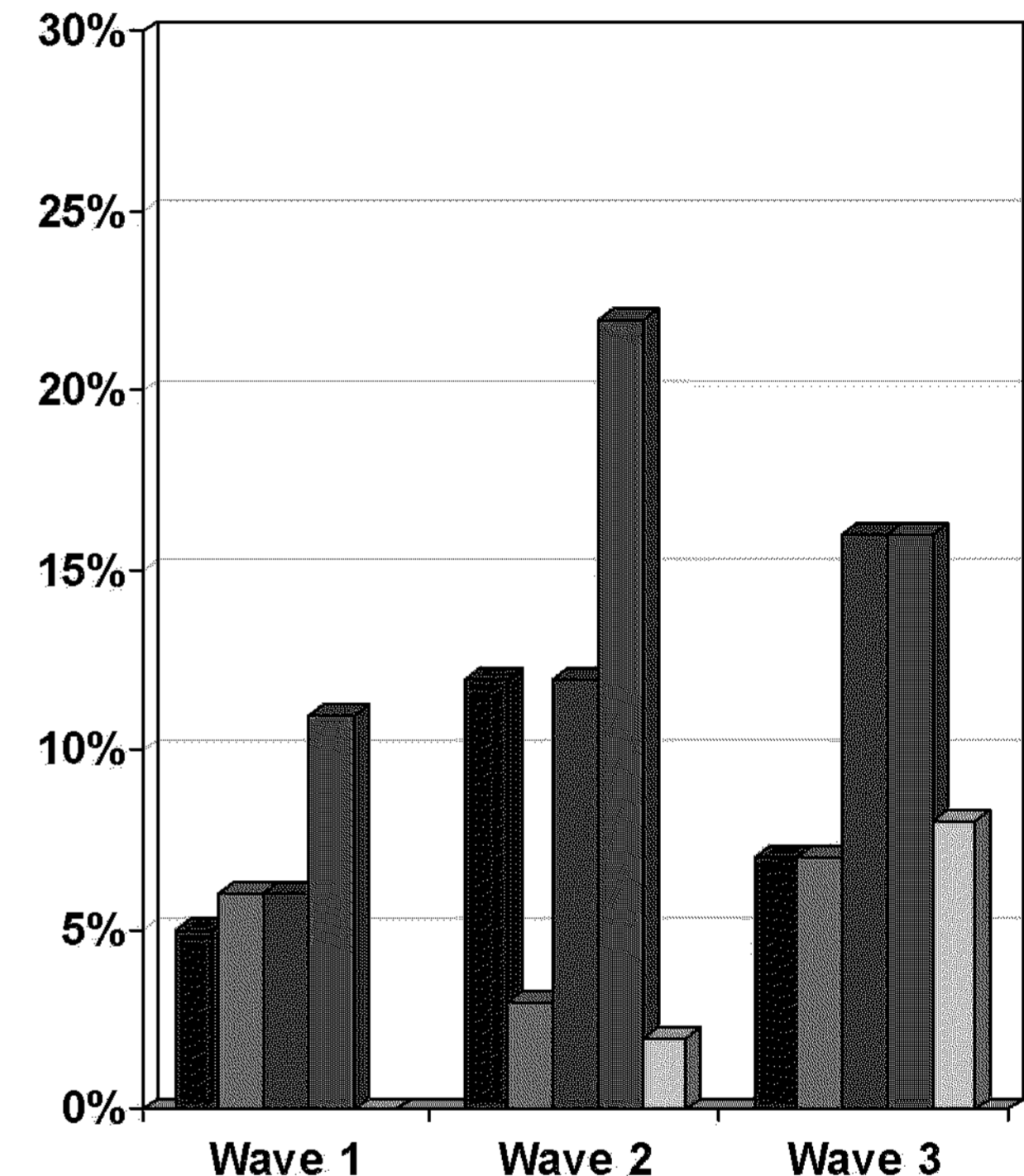
CMHC



PRIVATE



INSTITUTIONAL

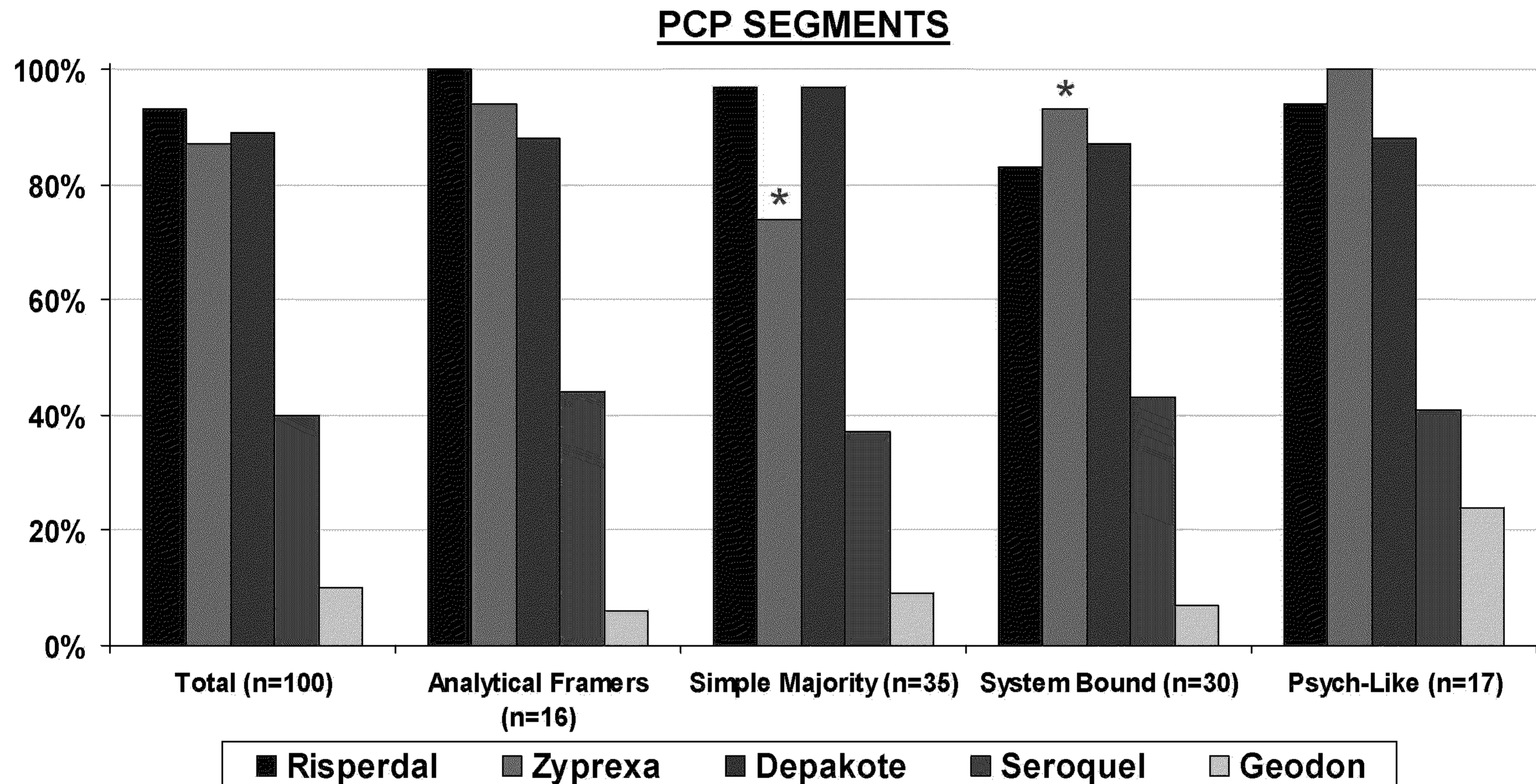


Base: Weight gain is manageable for patients treated with medication
 Q750 Do you currently use additional medications to manage weight gain occurring with...?

Physician Segmentation

Results: Specific Agents

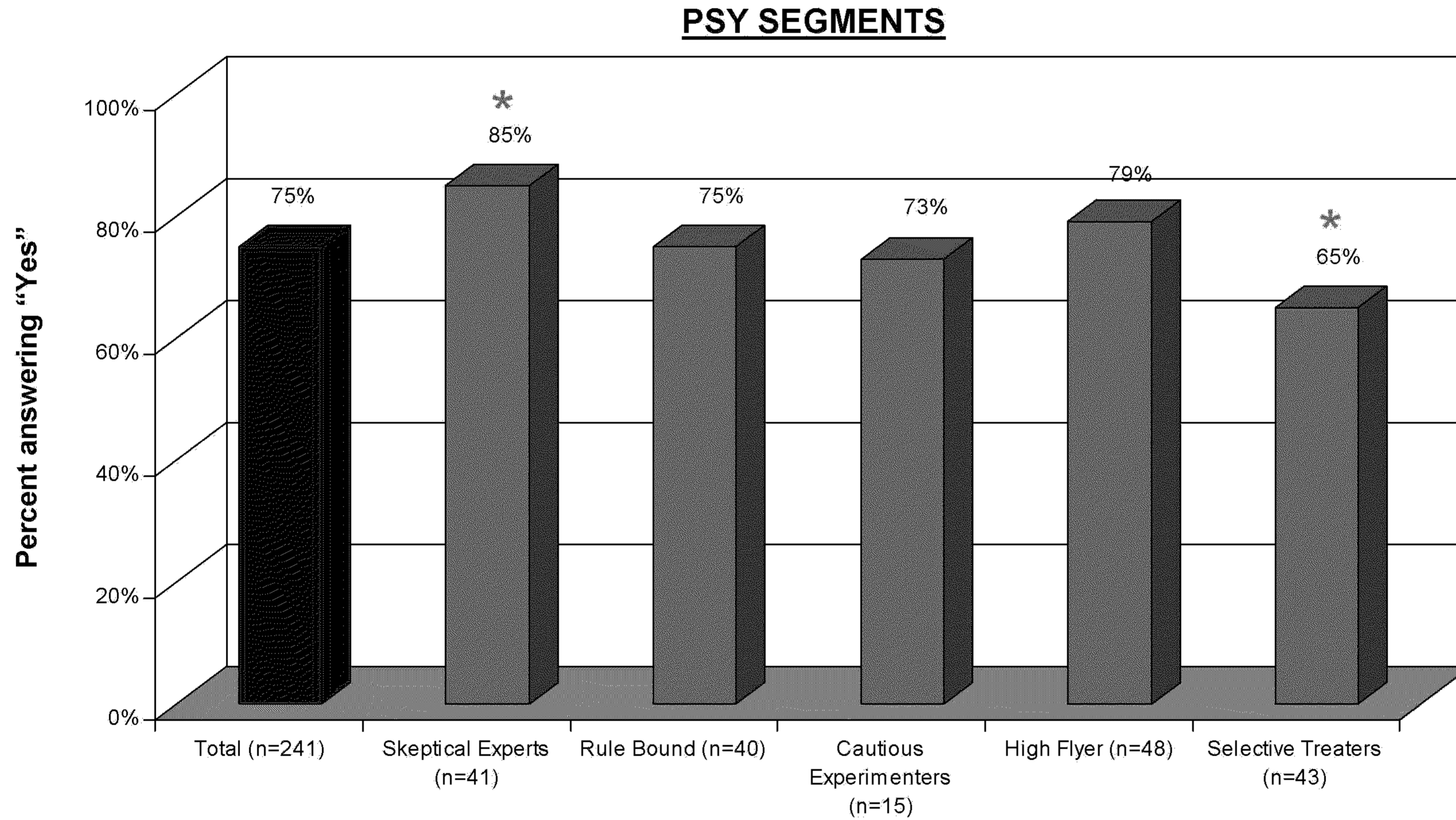
Prescribed in last 6 months



BASE: Qualified Physicians

Q220 Please select the following medications that you have prescribed within the last 6 months.

Results: Hyperglycemia and Diabetes Prevalence among the mentally ill



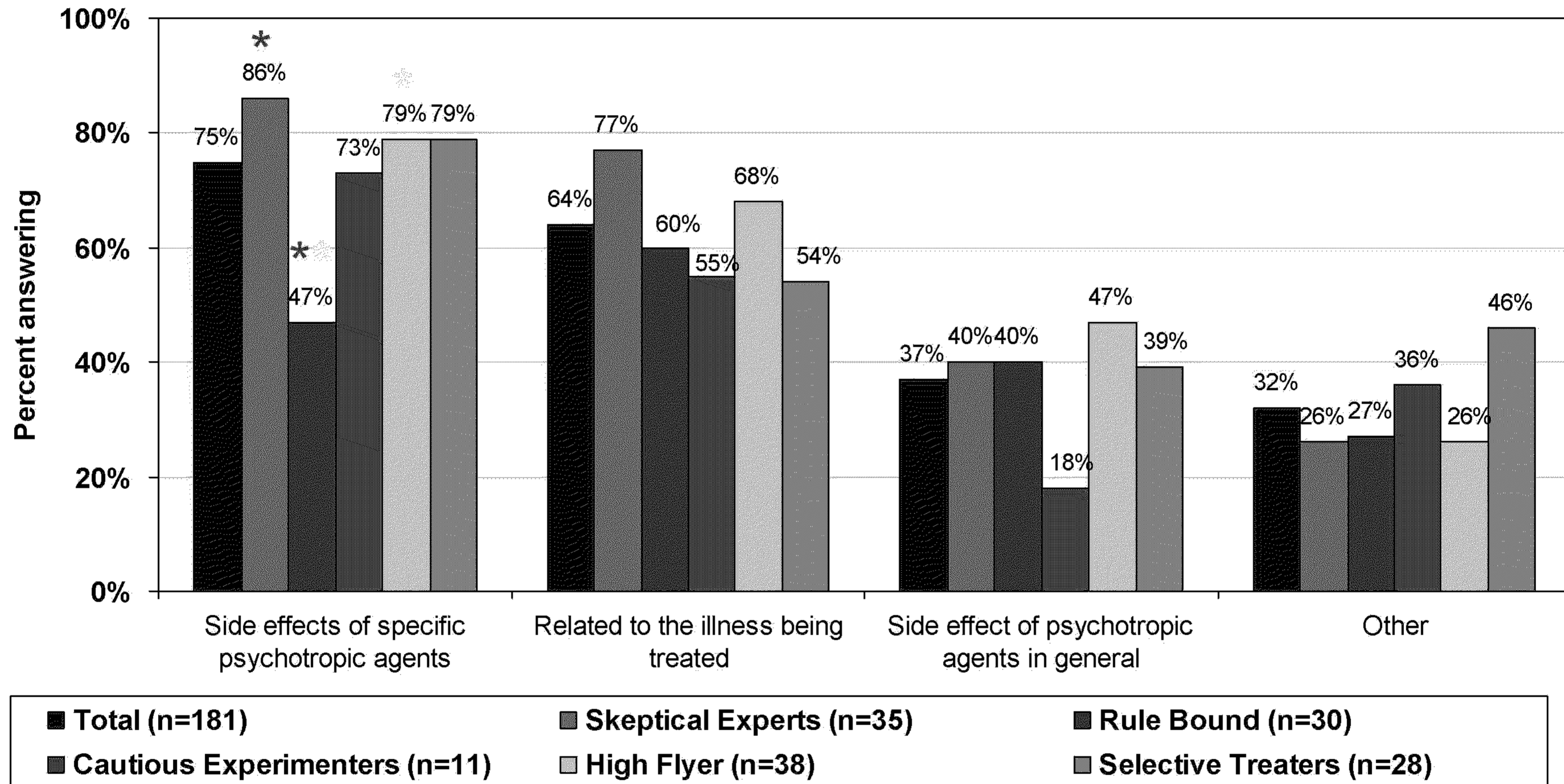
BASE: All Physicians

Q300 Do you think hyperglycemia and/or diabetes is more prevalent in patients receiving treatment for mental illness as compared to the general population?

Results: Hyperglycemia and Diabetes

Risk-factors among the mentally ill

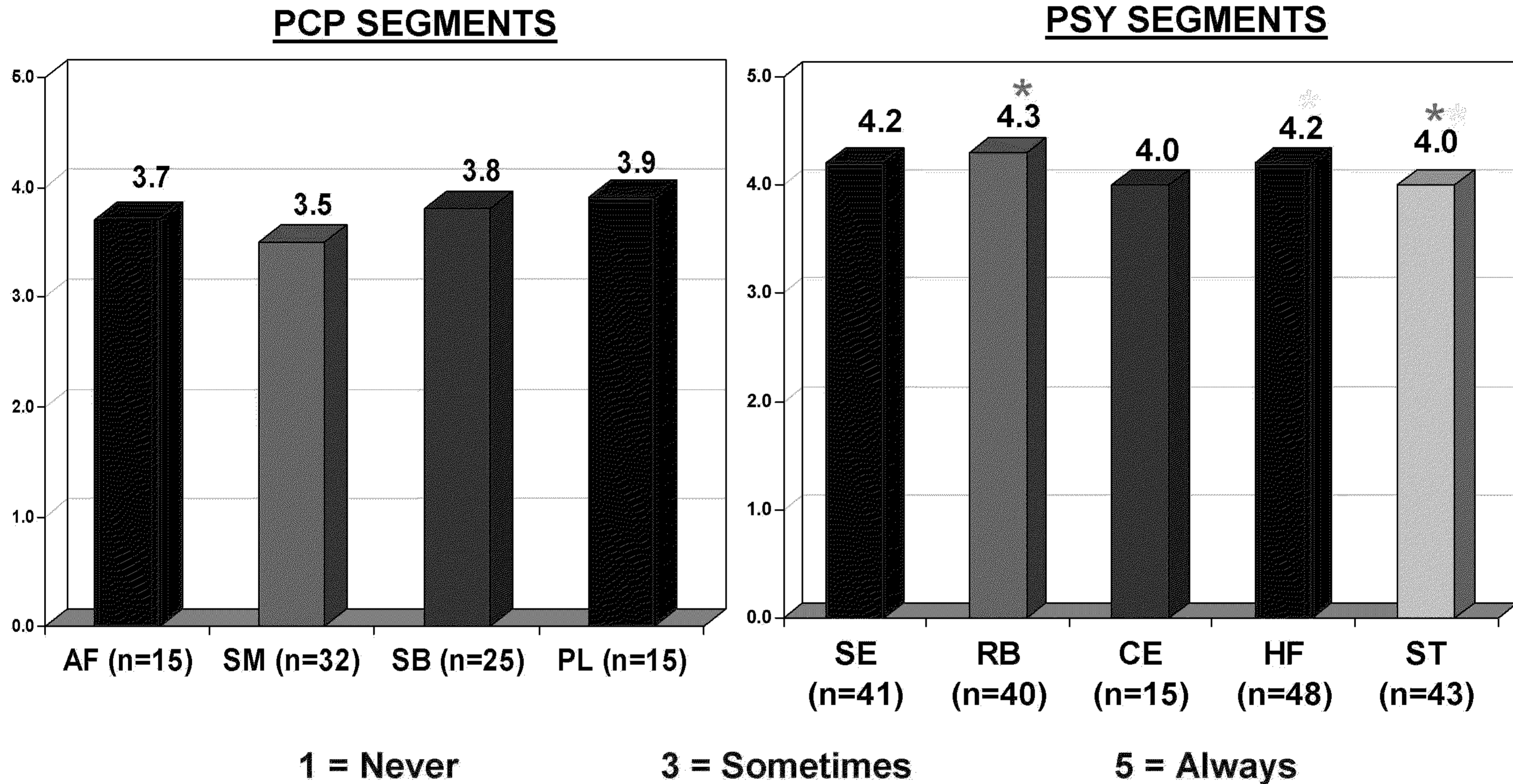
PSY SEGMENTS



Base: Think hyperglycemia/diabetes is more prevalent among patients receiving treatment for mental illness
 Q305 To what do you attribute this higher level of hyperglycemia and/or diabetes?

Results: Weight Gain

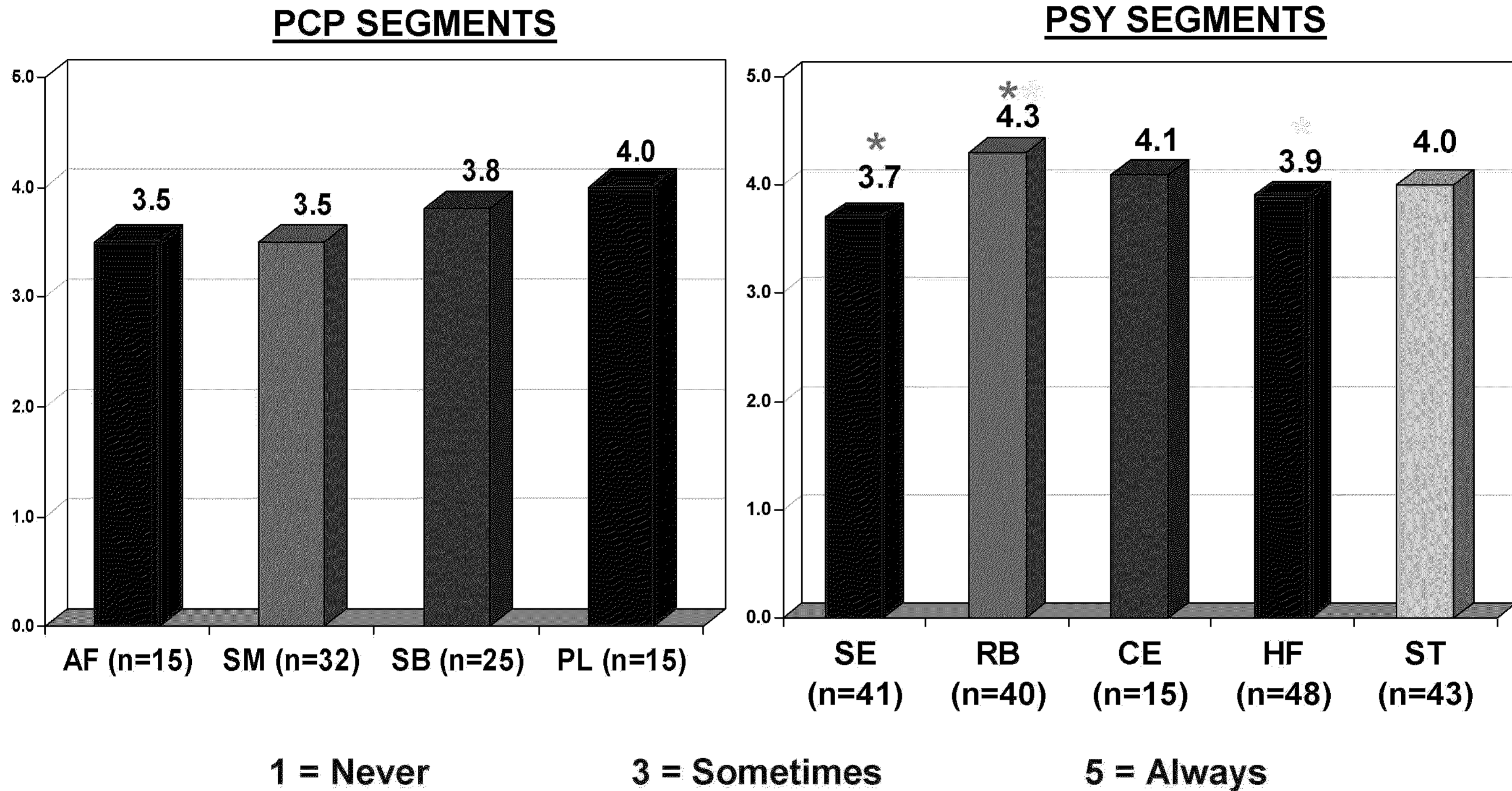
Discussions about weight gain management



Base: Concerned about weight gain in patients that are treated with psychotropic agents
Q520 How often do you discuss the management of weight gain with your patients?

Results: Weight Gain

Counseling about healthy living - Private Practice Psychiatrists



Base: Concerned about weight gain in patients that are treated with psychotropic agents

Q530 How often do you offer counseling to your patients starting psychotropic medications about healthy living, exercise, etc.?

Results: Weight Gain

Preferred counseling or management techniques

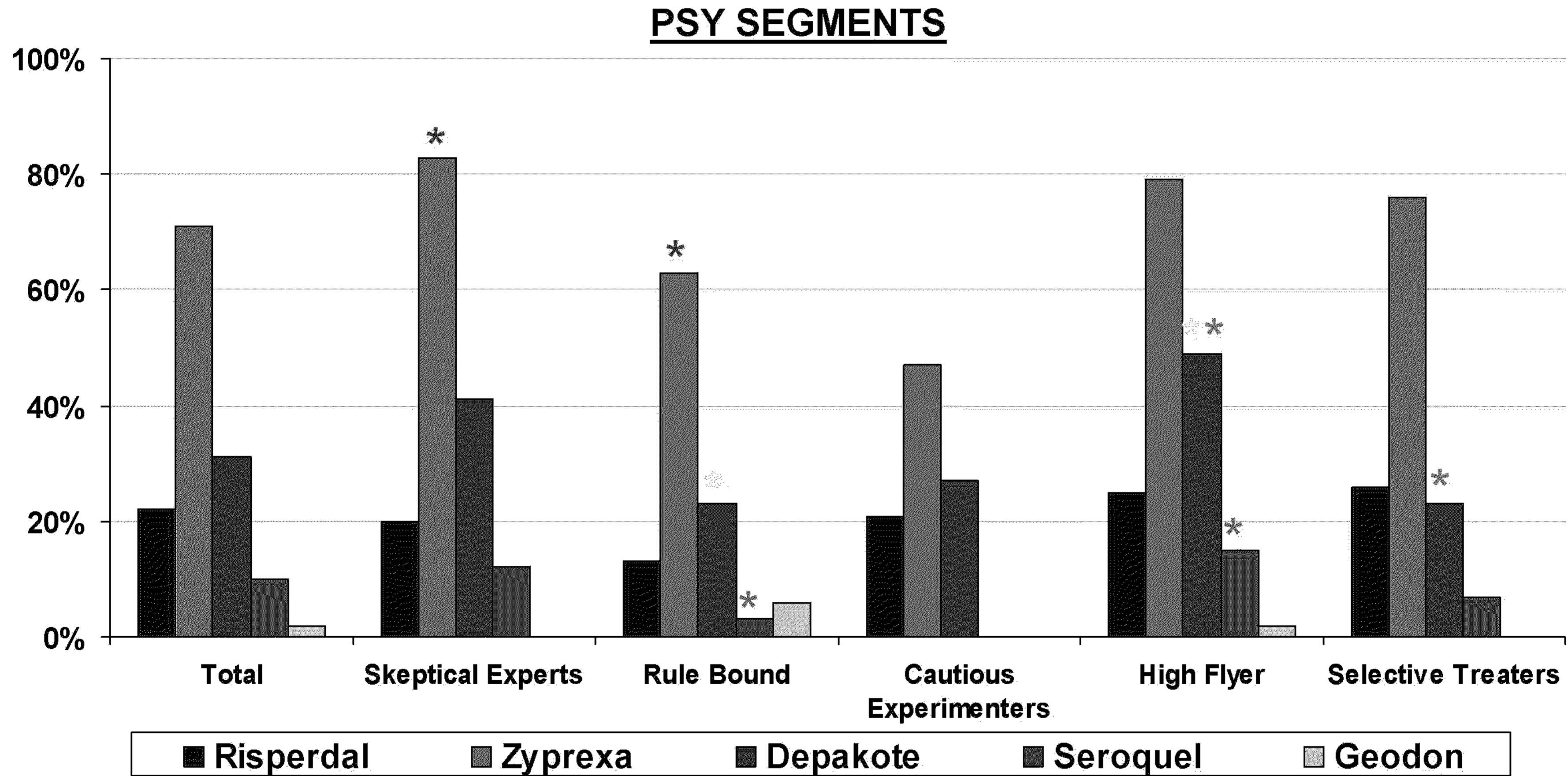
PSY SEGMENTS

Counseling/Management Techniques	Total (n=241)	SE (n=41)	RB (n=40)	CE (n=15)	HF (n=48)	ST (n=43)
Diet and exercise	93%	90%	95%	100%	96%	88%
Nutrition and exercise counseling by another health care provider	53%	56%	48%	27%	46%	60%
Pharmacologic therapy	44%	59% *	40%	47%	56%	33% *
Diet alone	21%	22%	23%	7%	23%	19%
Other methods	7%	10%	3%	7%	8%	7%

Base: Discuss the management of weight gain with patients or offer counseling to patients starting on psychotropic medications
 Q540 What counseling or management techniques are most likely to be used in your practice setting?

Results: Specific Agents

Patients developing hyperglycemia/diabetes by medication

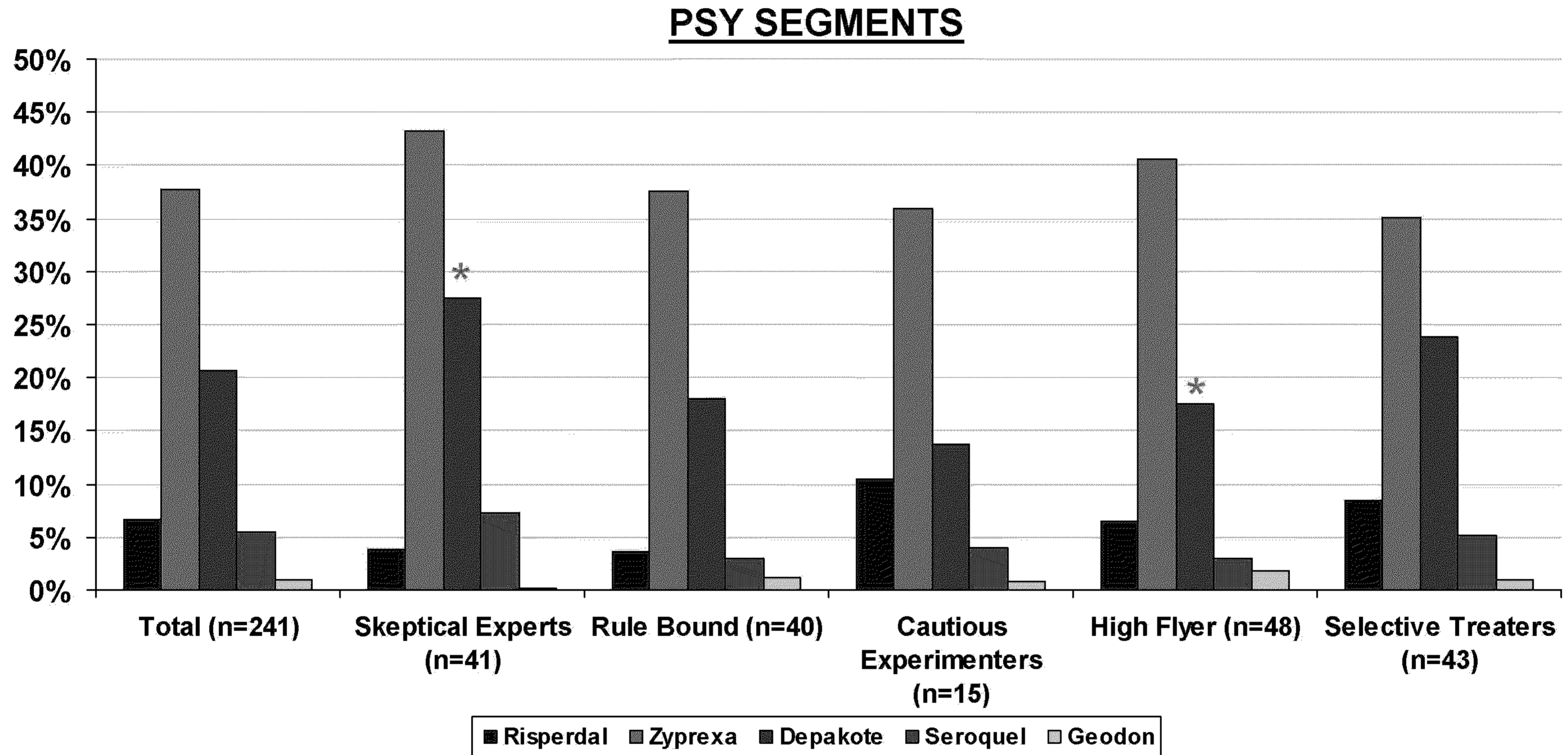


Base: Prescribes medication

Q630 Have any of your patients taking... developed hyperglycemia and/or diabetes?

Results: Specific Agents

Concerns about weight gain prevents prescription

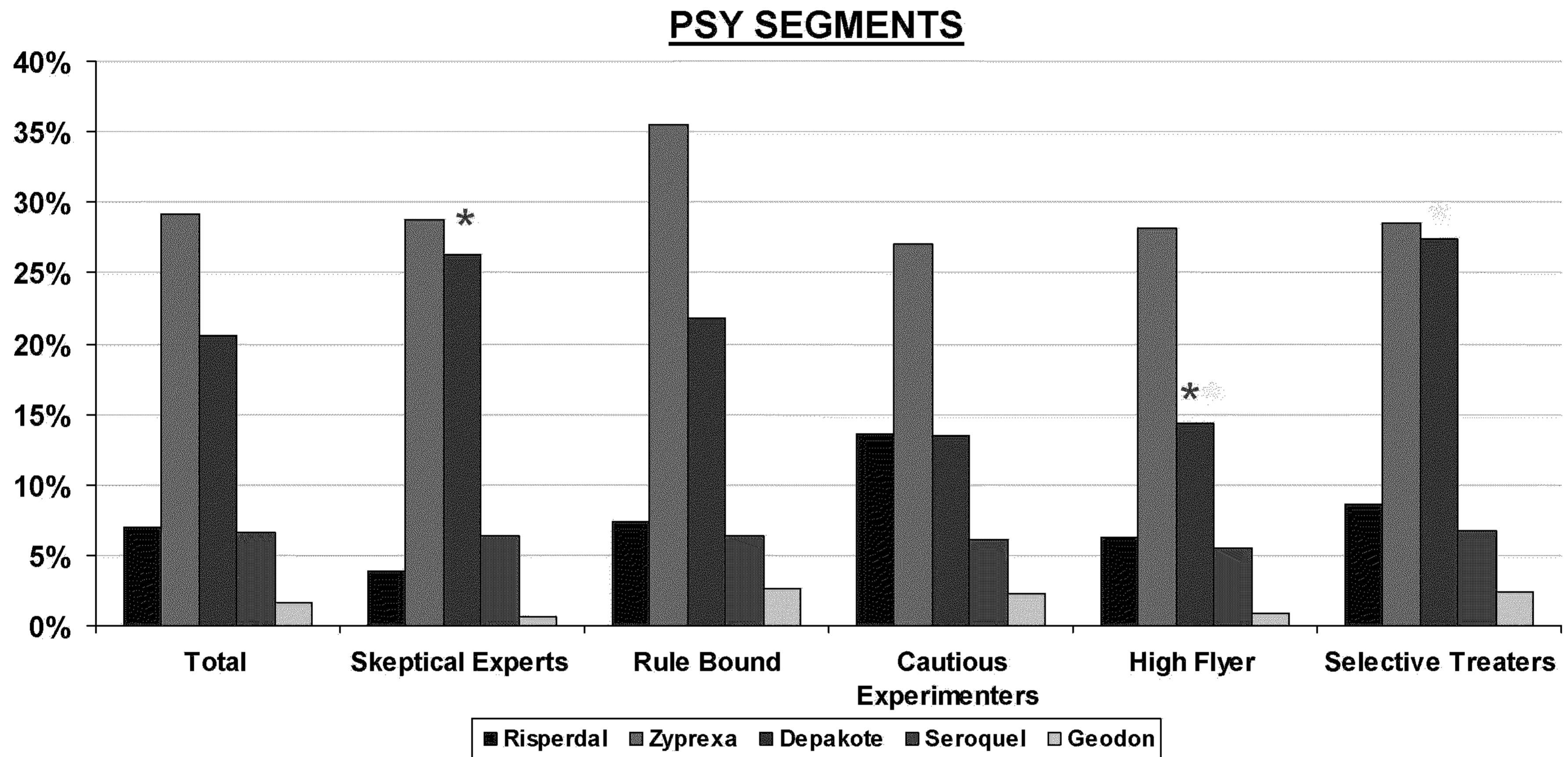


Base: Prescribes medication

Q700 When you consider prescribing..., what percentage of the time do you make a conscious decision not to prescribe it due to concerns about weight gain?

Results: Specific Agents

Discontinues medication due to weight gain

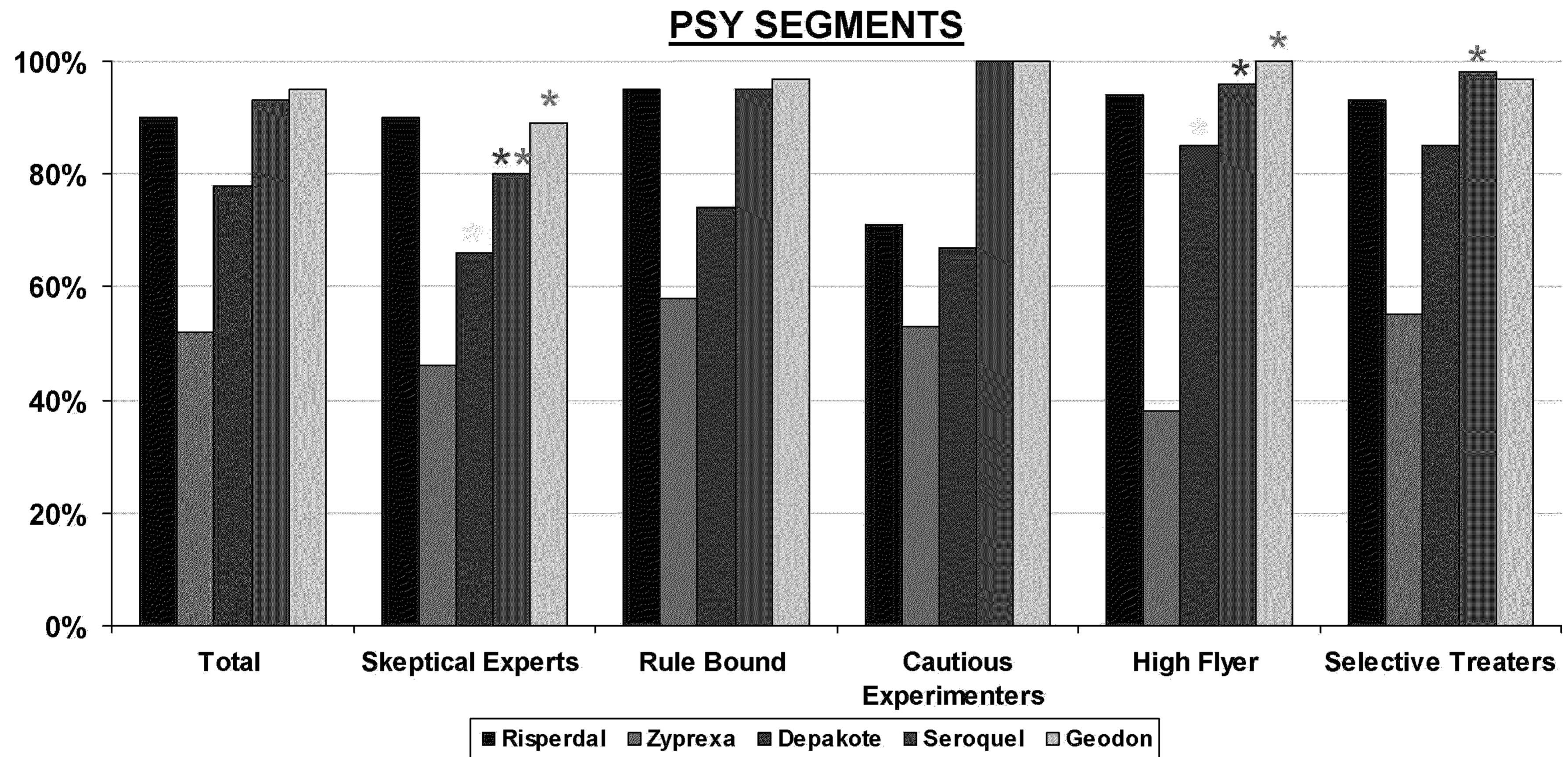


Base: Prescribes medication

Q710 What percentage of the time do you discontinue use of... due to weight gain?

Results: Specific Agents

Manageability of weight gain

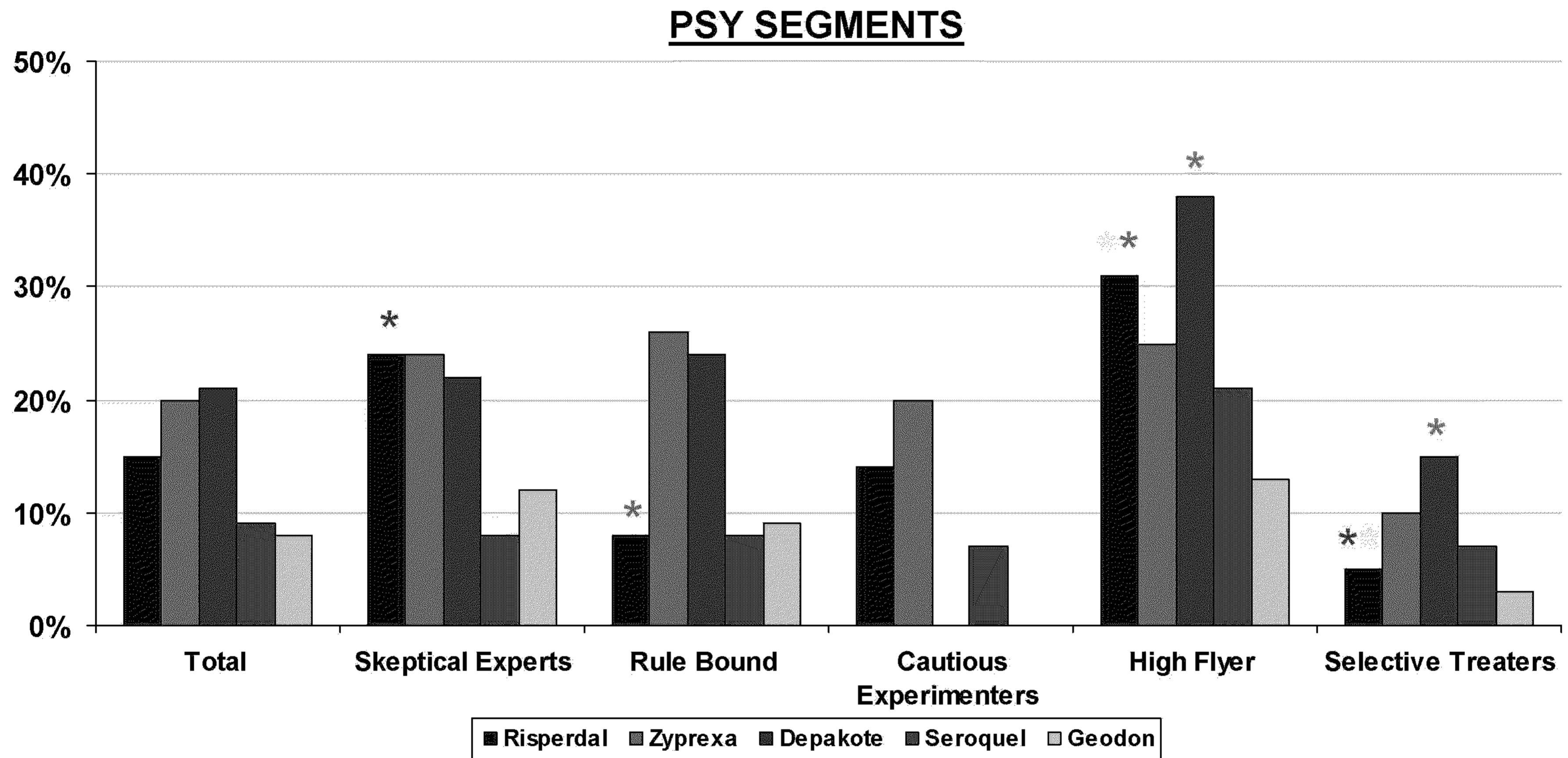


BASE: Prescribes medication

Q730 If a patient treated with...gains weight, is it manageable?

Results: Specific Agents

Other medications to manage weight gain

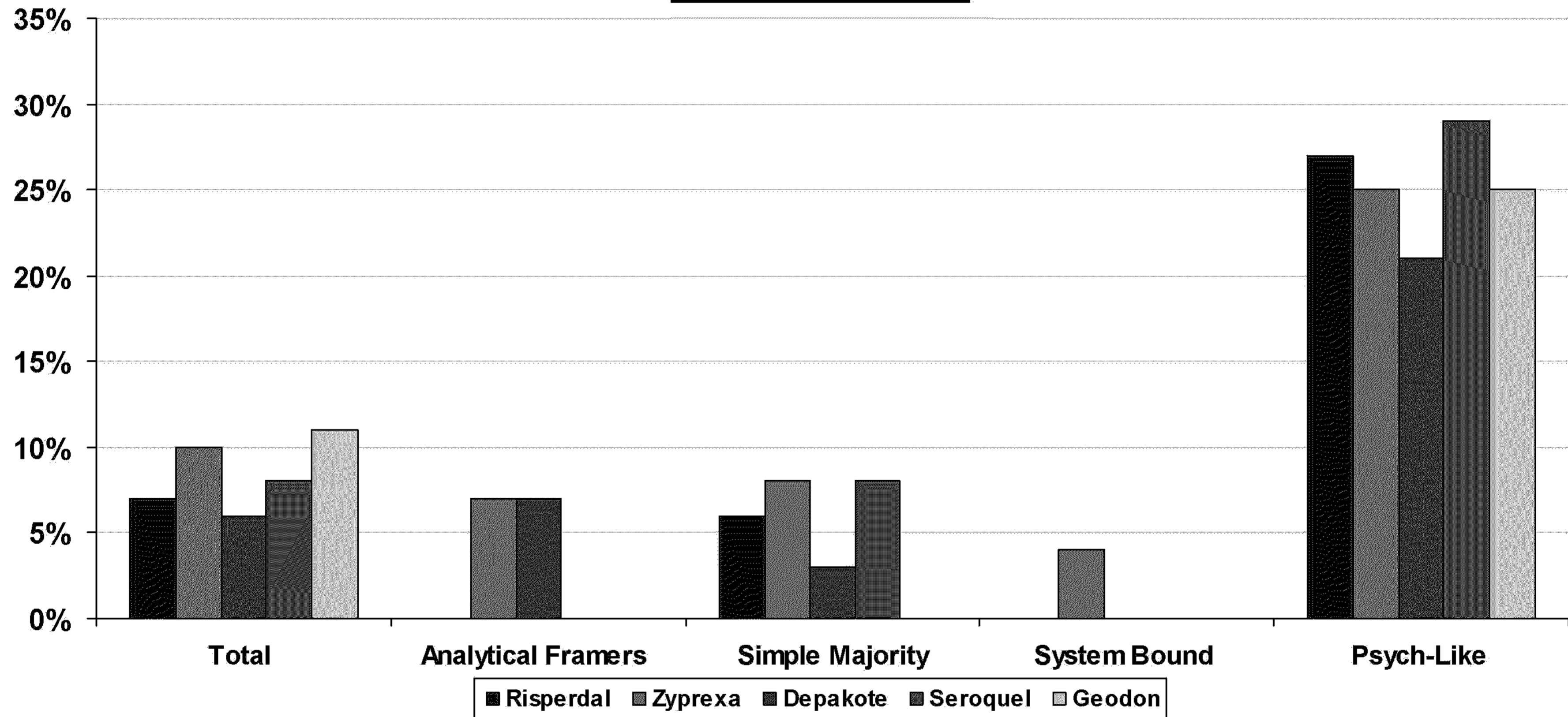


Base: Weight gain is manageable for patients treated with medication
 Q750 Do you currently use additional medications to manage weight gain occurring with...?

Results: Specific Agents

Other medications to manage weight gain

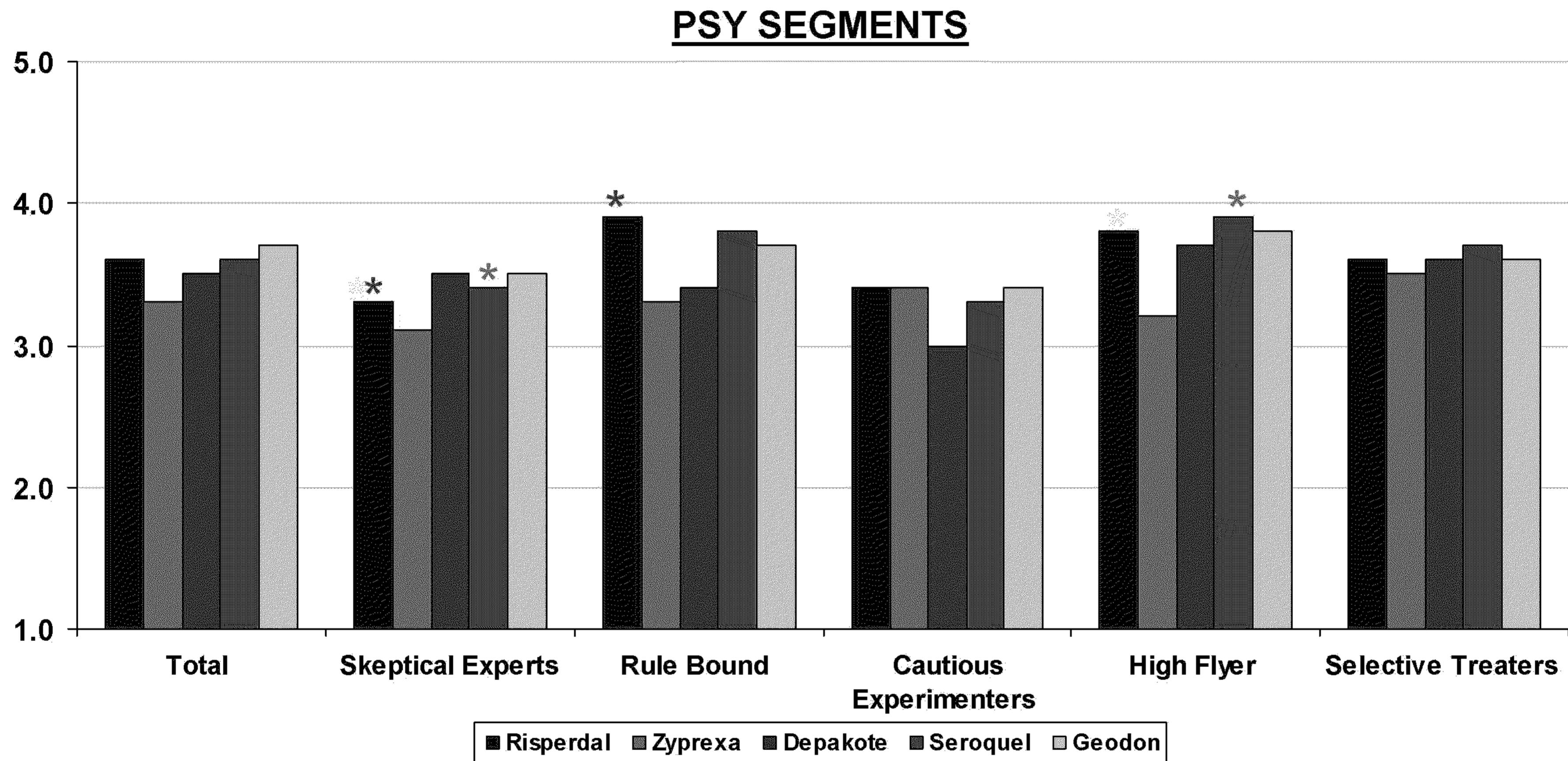
PCP SEGMENTS



Base: Weight gain is manageable for patients treated with medication
 Q750 Do you currently use additional medications to manage weight gain occurring with...?

Results: Specific Agents

Credibility of representatives

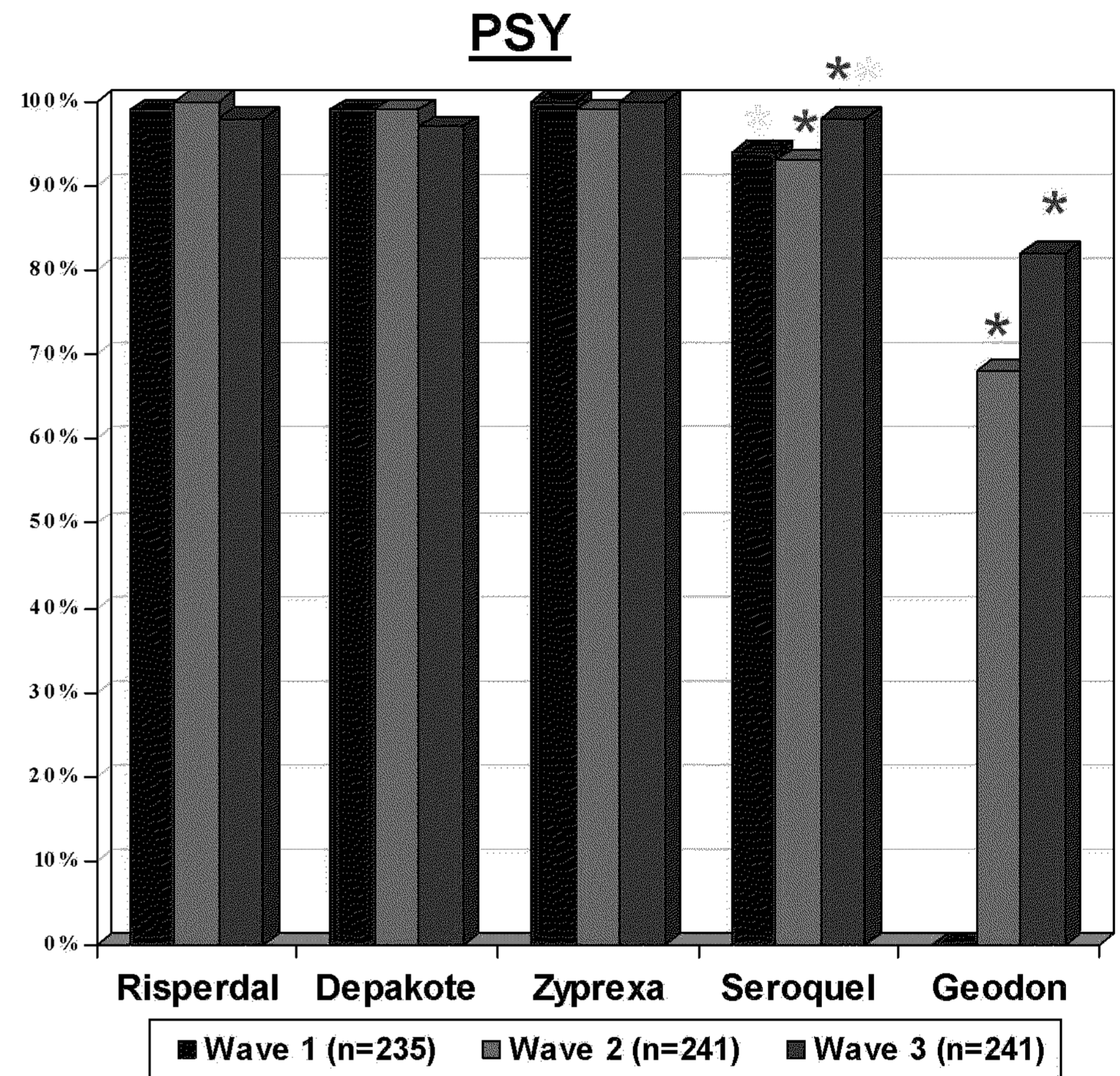
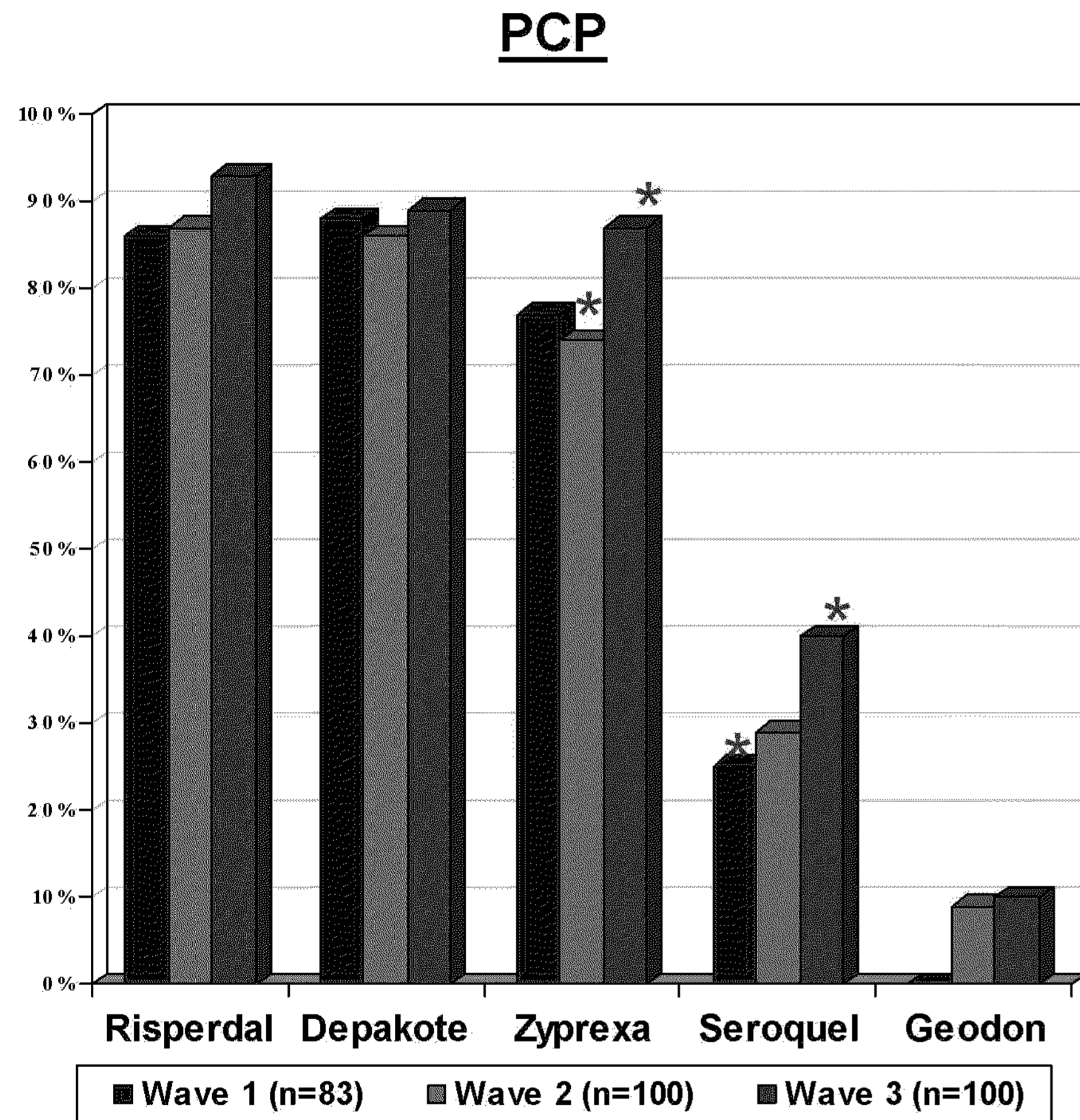


Base: Prescribes Medication

Q790 How credible do you consider the... representative to be when discussing the side effects of the competing psychotropic agents? (1 = Not at all credible, 5 = Highly credible)

Physician Demographics

Usage of Specific Agents Prescribed in last 6 months

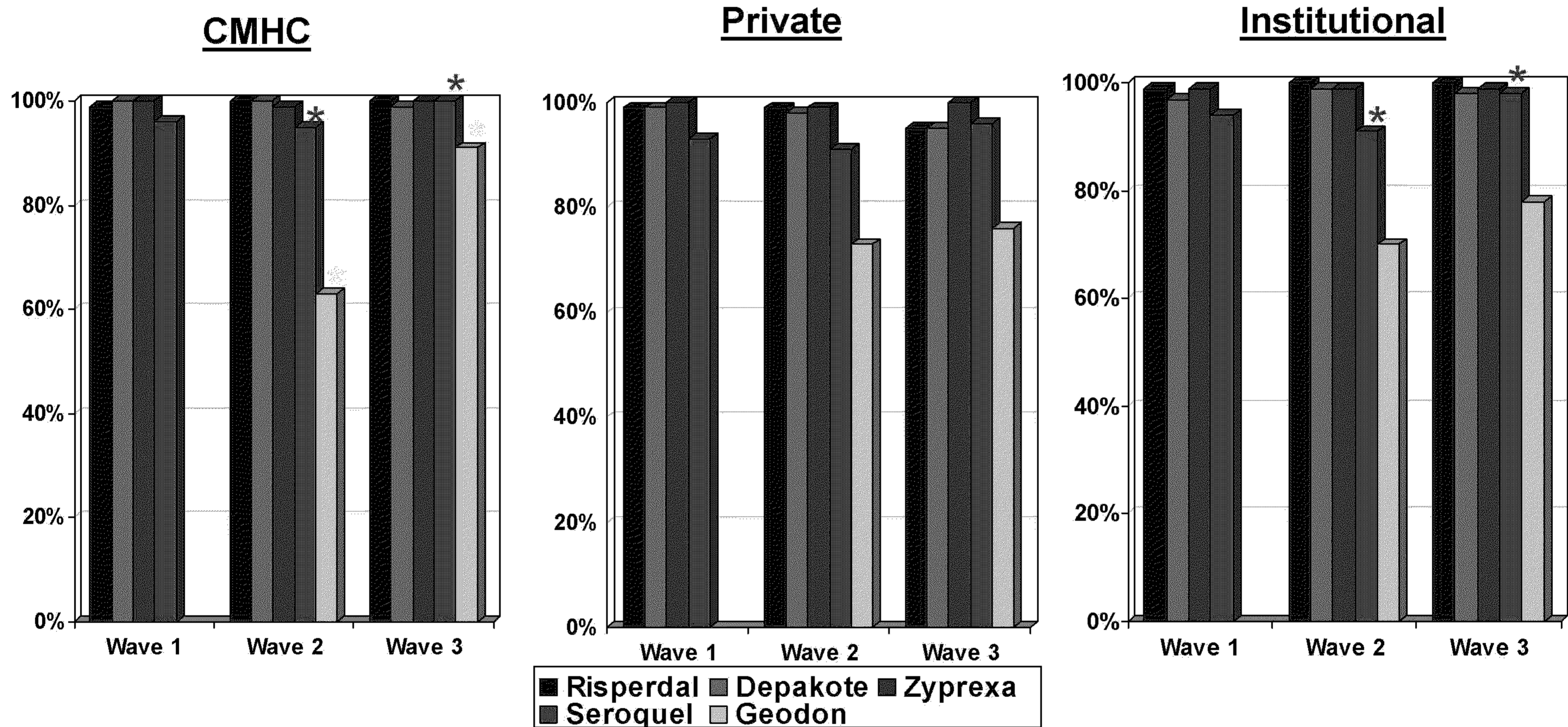


BASE: Qualified Physicians

Q220 Please select the following medications that you have prescribed within the last 6 months.

Usage of Specific Agents

Prescribed in last 6 months



BASE: Qualified Physicians

Q220 Please select the following medications that you have prescribed within the last 6 months.

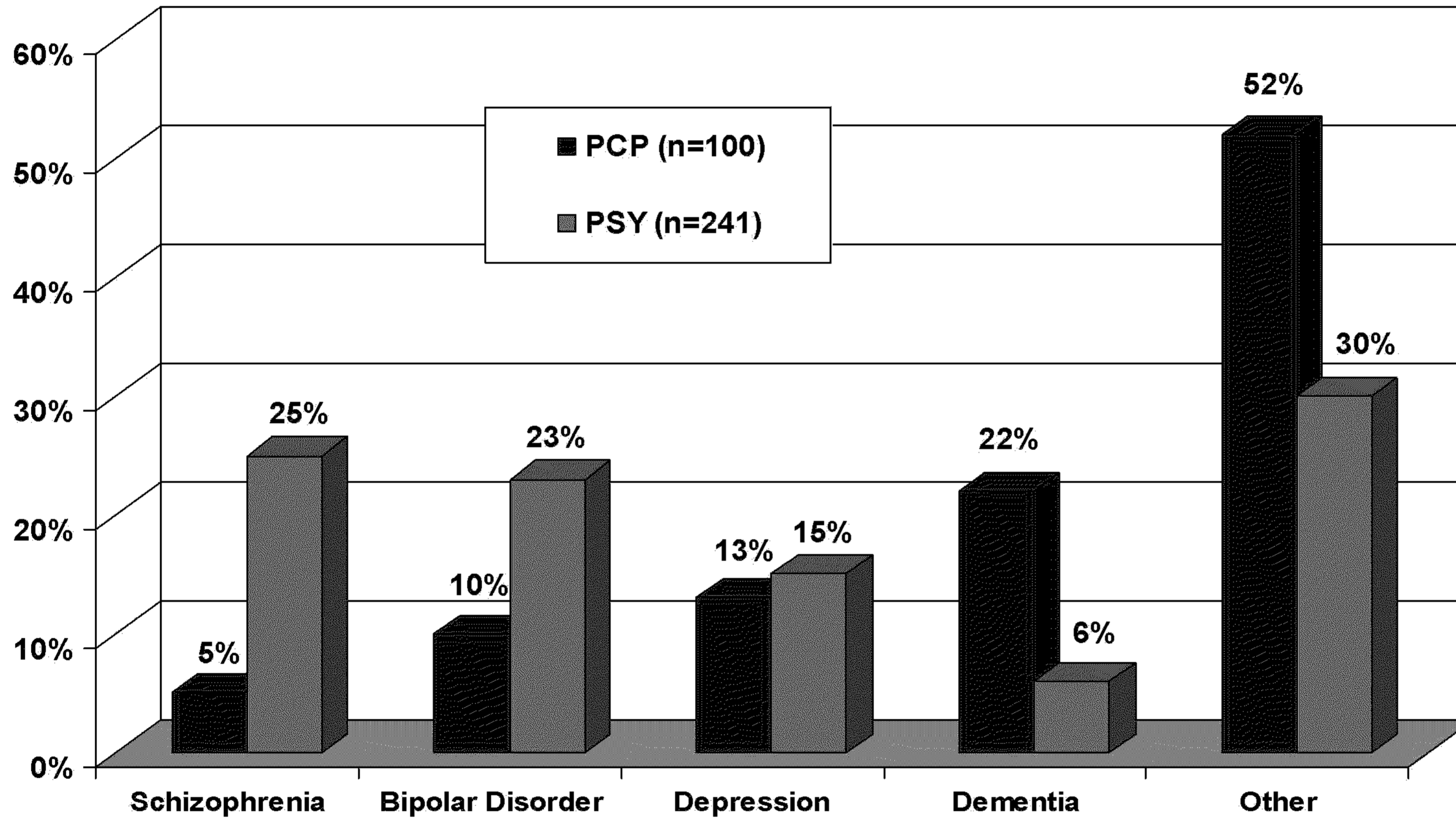
Demographics

Practice profile

		PCP (N=100)			PSY (N=241)		
		n	%	Mean	n	%	Mean
Number of years practicing				16.6			16.4
	1-10	18	18		81	34	
	11-20	56	56		85	35	
	21-30	25	25		60	25	
	31-40	1	1		12	5	
	41 or more	0	0		3	1	
Number of patients per month				476.5			204.2
	1-100	1	1		66	27	
	101-200	9	9		88	37	
	201 or more	90	90		87	36	
Primary type of practice							
	Solo/Private	26	26		86	36	
	Partnership/Group	71	71		34	14	
	CMHC	0	0		103	43	
	Clinic	8	8		47	20	
	State hospital	0	0		26	11	
	Gov't hospital	0	0		18	7	
	HMO	4	4		4	2	
	Other	0	0		46	19	

Demographics

Patient population

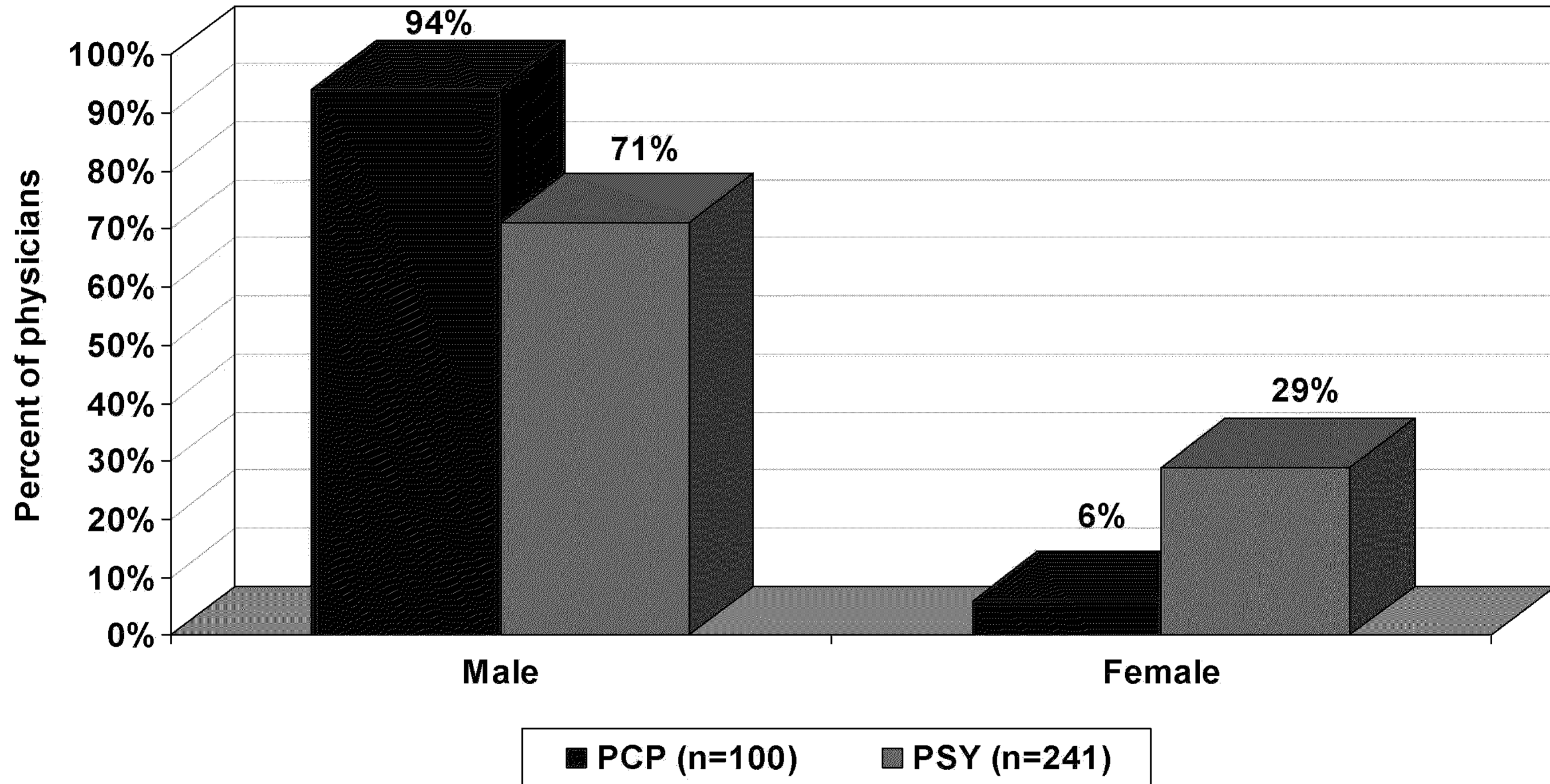


BASE: Qualified physicians

Q121 What percentage of your patients are treated for the following?

Demographics

Gender



BASE: Qualified physicians

Q103 Are you...?