Answers That Matter.
Zyprexa Market Research

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

Lilly
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

Total Respondents 241

75% of MD's see greater prevalence of hyperglycemia/diabetes in patients treated for mental illness

W1: 67% Feb 2001
W2: 73% July 2001

181 MD's who see >prevalence Of H/D

W2: 69%
W1: 75%

75% of respondents feel hyperglycemia is a side effect of specific agent

136 MD's feel hyperglycemia is a SE specific to agent

W2: 99%
W1: 98%

133 or 98% feel specific to Zyprexa

32 or 100% feel there is increased risk of hyperglycemia/diabetes associated with Zyprexa

32 or 53% attribute an increase risk to a specific agent

W2: 66%
W1: 53%
Flow Chart of PCP Responses

Total Respondents 100

69 MD's who do not see higher prevalence of hyperglycemia/diabetes in patients treated for mental illness

31% of MD's see greater prevalence of hyperglycemia/diabetes in patients treated for mental illness

Wave 2: 30% July 2001
Wave 1: 23% Feb 2001

31 MD's who see >prevalence Of H/D

W2: 20%
W1: 32%

10% of respondents feel hyperglycemia is a side effect of specific agent

3 MD's feel hyperglycemia is a SE specific to agent

4 or 6% attribute an increase risk to a specific agent

W2: 6%
W1: 6%

W2: 75%
W1: 25%

4 or 100% feel there is in increased risk of hyperglycemia/diabetes associated with Zyprexa

W2: 50%
W1: 67%

3 or 100% feel specific to Zyprexa
Comparable Rates the perception of MDs
Patients developing hyperglycemia/diabetes by medication

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
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?

Tony Fiola
Tracking Study Wave 3 Report

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Discontinuations also continue to rise
Discontinues medication due to hyperglycemia/diabetes

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**

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*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

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?

1 = Never  3 = Sometimes  5 = Always
Discussing healthy living is nearly as common
Counseling about healthy living

![Bar charts](image)

**PCP**

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**PSY**

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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. 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

PRACTICE SETTING

<table>
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<th>Setting</th>
<th>Percent of Physicians</th>
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<td>Diet and exercise</td>
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<td>Nutrition and exercise counseling by another health care provider</td>
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<td>Pharmacologic therapy</td>
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<td>Diet alone</td>
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<td>Other</td>
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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

PRACTICE SETTING

Percent of physicians who reported "Yes"

LTC (n=187)  CMHC (n=81)  Private Practice (n=80)  Institutional (n=80)

Wave 1  Wave 2  Wave 3

73%  73%  75%  76%
83%  73%  53%  63%
73%  73%  73%  78%

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**

**PRIVATE**

**INSTITUTIONAL**

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

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

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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

PRIVATE PRACTICE

Percent of physicians

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<td>Myself</td>
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<tr>
<td>Treatment team member</td>
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<td>3%</td>
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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

PRIVATE PRACTICE

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<td>10%</td>
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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)

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<td>(n=9)</td>
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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

**CMHC**

**PRIVATE**

**INSTITUTIONAL**

BASE: Prescribes medication

Q730 If a patient treated with...gains weight, is it manageable?
## More switching in institution for Resp., Ser., & Dpk.

### Weight gain management

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<td>2%</td>
<td>13%</td>
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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

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<td>Changes in medication</td>
<td>36%</td>
<td>47%*</td>
<td>25%*</td>
</tr>
<tr>
<td>Counseling on Behavioral/lifestyle changes</td>
<td>6%</td>
<td>3%</td>
<td>3%</td>
</tr>
<tr>
<td>GEODON</td>
<td>(n=0)</td>
<td>(n=46)</td>
<td>(n=72)</td>
</tr>
<tr>
<td>Diet/exercise/nutritional counseling</td>
<td>N/A</td>
<td>61%</td>
<td>75%</td>
</tr>
<tr>
<td>Weight gain a non-issue</td>
<td>N/A</td>
<td>22%</td>
<td>18%</td>
</tr>
<tr>
<td>Changes in medication</td>
<td>N/A</td>
<td>7%</td>
<td>6%</td>
</tr>
</tbody>
</table>

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

PCP SEGMENTS

BASE: Qualified Physicians

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

Tony Fiola
Tracking Study Wave 3 Report

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**Results: Hyperglycemia and Diabetes**

Prevalence among the mentally ill

---

**PSY SEGMENTS**

<table>
<thead>
<tr>
<th>Segment</th>
<th>Percent answering “Yes”</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total (n=241)</td>
<td>75%</td>
</tr>
<tr>
<td>Skeptical Experts (n=41)</td>
<td>85%</td>
</tr>
<tr>
<td>Rule Bound (n=40)</td>
<td>75%</td>
</tr>
<tr>
<td>Cautious Experimenters (n=15)</td>
<td>73%</td>
</tr>
<tr>
<td>High Flyer (n=48)</td>
<td>79%</td>
</tr>
<tr>
<td>Selective Treaters (n=43)</td>
<td>65%</td>
</tr>
</tbody>
</table>

---

**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

PCP SEGMENTS

<table>
<thead>
<tr>
<th></th>
<th>PCP SEGMENTS</th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>AF (n=15)</td>
<td>3.7</td>
<td></td>
</tr>
<tr>
<td></td>
<td>SM (n=32)</td>
<td>3.5</td>
<td></td>
</tr>
<tr>
<td></td>
<td>SB (n=25)</td>
<td>3.8</td>
<td></td>
</tr>
<tr>
<td></td>
<td>PL (n=15)</td>
<td>3.9</td>
<td></td>
</tr>
</tbody>
</table>

PSY SEGMENTS

<table>
<thead>
<tr>
<th></th>
<th>PSY SEGMENTS</th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>SE (n=41)</td>
<td>4.2</td>
<td></td>
</tr>
<tr>
<td></td>
<td>RB (n=40)</td>
<td>4.3</td>
<td>*</td>
</tr>
<tr>
<td></td>
<td>CE (n=15)</td>
<td>4.0</td>
<td></td>
</tr>
<tr>
<td></td>
<td>HF (n=48)</td>
<td>4.2</td>
<td></td>
</tr>
<tr>
<td></td>
<td>ST (n=43)</td>
<td>4.0</td>
<td></td>
</tr>
</tbody>
</table>

1 = Never 3 = Sometimes 5 = Always

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

**PCP SEGMENTS**

- AF (n=15): 3.5
- SM (n=32): 3.5
- SB (n=25): 3.8
- PL (n=15): 4.0

**PSY SEGMENTS**

- SE (n=41): 3.7
- RB (n=40): 4.3
- CE (n=15): 4.1
- HF (n=48): 3.9
- ST (n=43): 4.0

1 = Never 3 = Sometimes 5 = Always

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

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

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

PSY SEGMENTS

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

PSY SEGMENTS

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

PSY 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
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

PSY SEGMENTS

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

**PCP**

- Risperdal
- Depakote
- Zyprexa
- Seroquel
- Geodon

**PSY**

- Risperdal
- Depakote
- Zyprexa
- Seroquel
- Geodon

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

<table>
<thead>
<tr>
<th>Number of years practicing</th>
<th>PCP (N=100)</th>
<th>PSY (N=241)</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>n</td>
<td>%</td>
</tr>
<tr>
<td>1-10</td>
<td>18</td>
<td>18</td>
</tr>
<tr>
<td>11-20</td>
<td>56</td>
<td>56</td>
</tr>
<tr>
<td>21-30</td>
<td>25</td>
<td>25</td>
</tr>
<tr>
<td>31-40</td>
<td>1</td>
<td>1</td>
</tr>
<tr>
<td>41 or more</td>
<td>0</td>
<td>0</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Number of patients per month</th>
<th>PCP (N=100)</th>
<th>PSY (N=241)</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>n</td>
<td>%</td>
</tr>
<tr>
<td>1-100</td>
<td>1</td>
<td>1</td>
</tr>
<tr>
<td>101-200</td>
<td>9</td>
<td>9</td>
</tr>
<tr>
<td>201 or more</td>
<td>90</td>
<td>90</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Primary type of practice</th>
<th>PCP (N=100)</th>
<th>PSY (N=241)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Solo/Private</td>
<td>26</td>
<td>26</td>
</tr>
<tr>
<td>Partnership/Group</td>
<td>71</td>
<td>71</td>
</tr>
<tr>
<td>CMHC</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>Clinic</td>
<td>8</td>
<td>8</td>
</tr>
<tr>
<td>State hospital</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>Gov’t hospital</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>HMO</td>
<td>4</td>
<td>4</td>
</tr>
<tr>
<td>Other</td>
<td>0</td>
<td>0</td>
</tr>
</tbody>
</table>
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...?

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