

Patient Assistance Programs

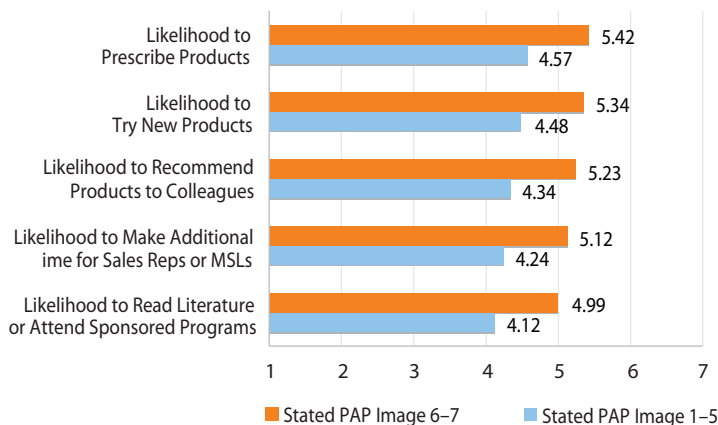
Oncology PAPs: Opportunities for Leadership

An OBR Exclusive Market Research Survey by Peter Carlin and Don Stark of Market Strategies International

With the convergence of the number of un- and under-insured Americans, the continued existence of health disparities, CMS payment cuts to providers, the rising cost of prescription medications, and the political scrutiny of pharmaceutical drug pricing, Patient Assistance Programs (PAPs) are playing a more prominent role in how pharmaceutical and biopharmaceutical companies are responding to the needs of patients. These issues are taking on an even greater importance in the oncology marketplace as patient access issues and oncology practices needs propel PAPs into a critical, and sometimes life-saving, role.

Market Strategies International recently completed an Internet survey for OBR of 50 community-based oncologists to further explore the importance of PAPs to community oncologists.

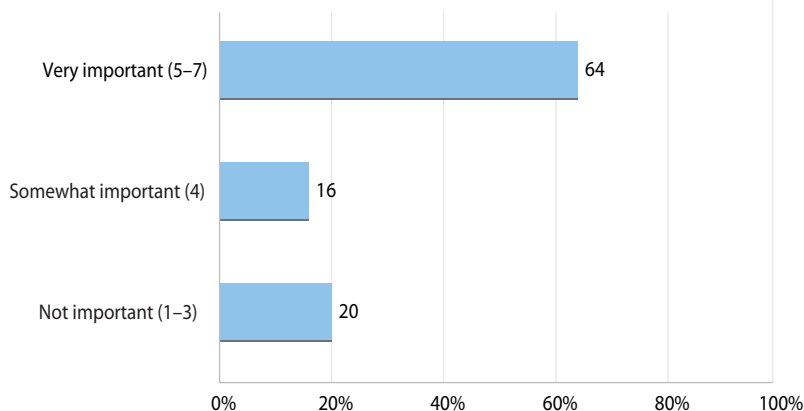
Comparison of Behaviors Between High and Low Image



Comparison of Behaviors Between High and Low Image (Primary Care Physicians)

As shown in the table, primary care physicians who have a high image of a company's PAP were more likely to prescribe that company's products; recommend that company's products to colleagues; and, make additional time to see that company's sales reps or MSLs (Source: 2008 MSImage PAP Syndicated Study). Among PCPs, perceptions of a company's PAP contribute 20% of the variance of overall corporate image.

Importance of a PAP to Oncologists' Relationships with Pharmaceutical Companies

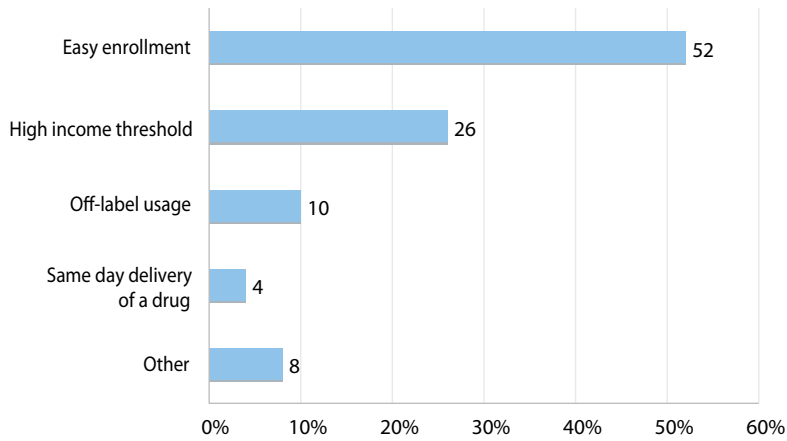


Importance of a PAP to Oncologists' Relationships with Pharmaceutical Companies

PAPs are perceived as integral to the relationship an oncologist has with a company. This is consistent with our research done on primary care physicians.



Most Important PAP Feature



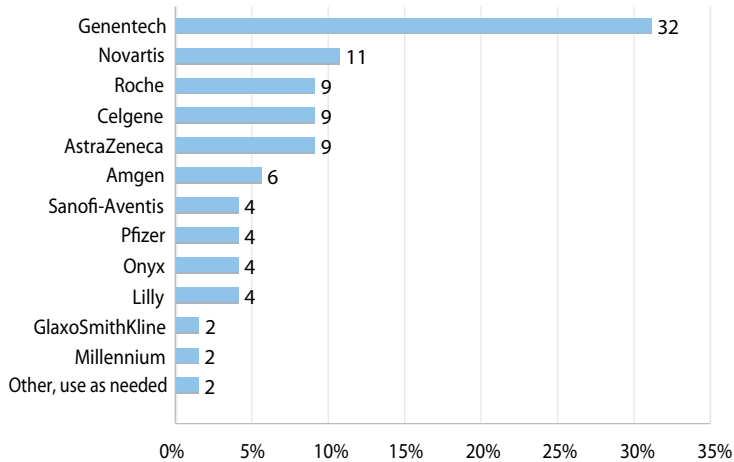
Most Important PAP Feature

The most important feature that over half the oncologists surveyed said they want to see in a company's PAP is an easy enrollment process. Oncologists want to see PAPs that don't have complicated paperwork or require too much paperwork. The second key feature is an income threshold that makes the program accessible to a larger proportion of the oncologist's patient population.

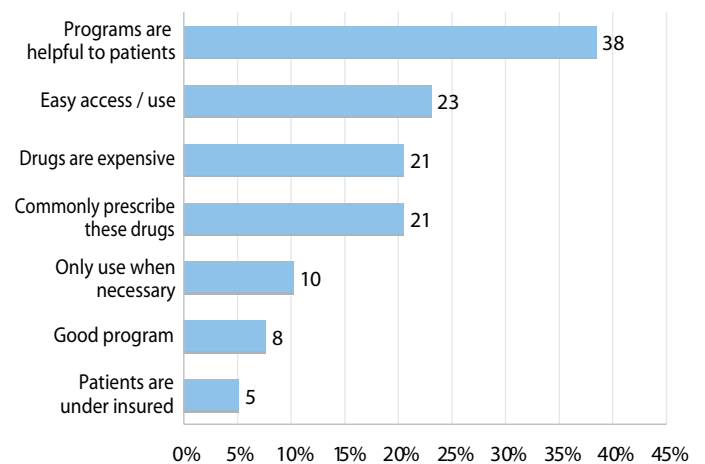
Most Used PAPs by Company & Reasons for Usage

Genentech by far has the most commonly used PAP which is probably not surprising given the frequency of use of the company's products. Novartis, Roche, Celgene and AstraZeneca PAPs are also commonly used probably due to the predominance of oral drugs in their marketed product portfolio. But as the Reasons chart shows, "frequent use" is not the only contributing factor. Programs that are perceived to be helpful to patients and easy to use top the list above Frequent Use suggesting that there is more value to a company's PAP in the minds of oncologists than just free drug.

Most Used PAPs by Company



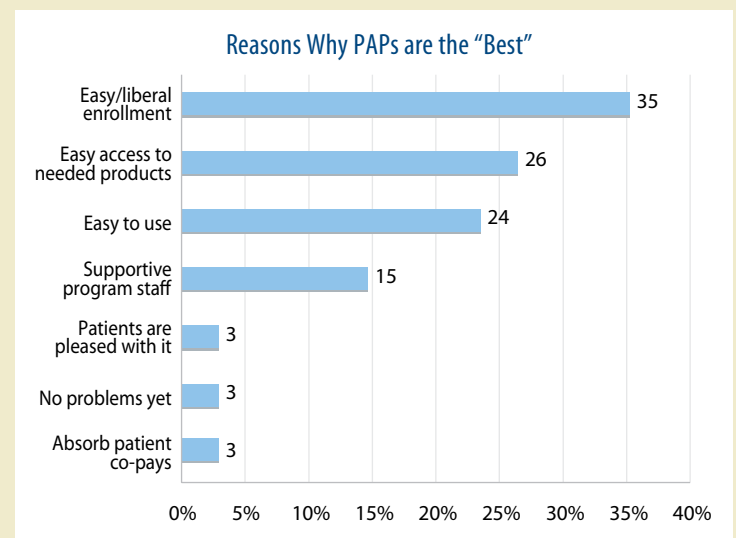
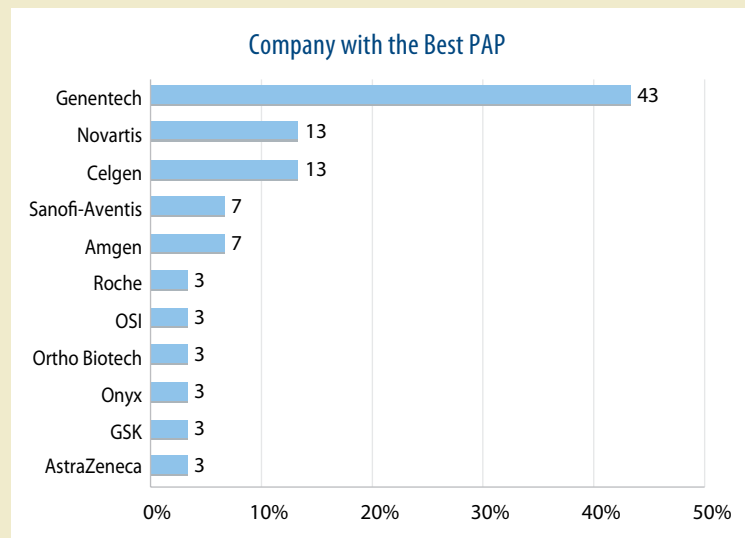
Reasons For Usage



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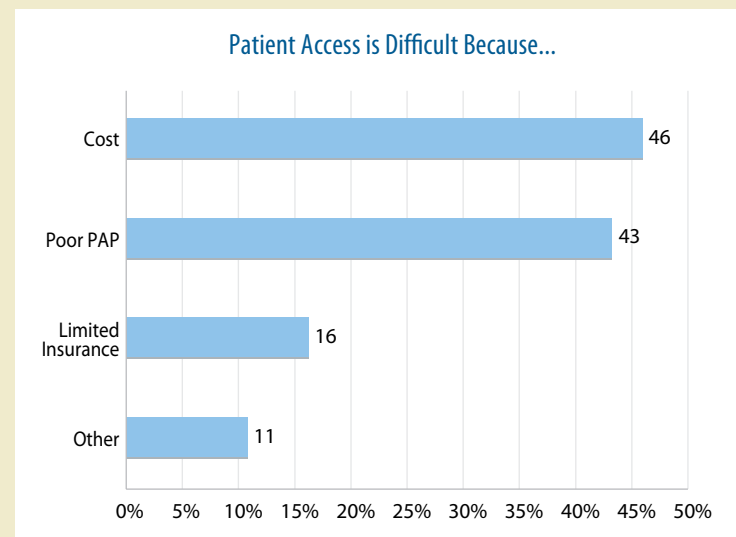
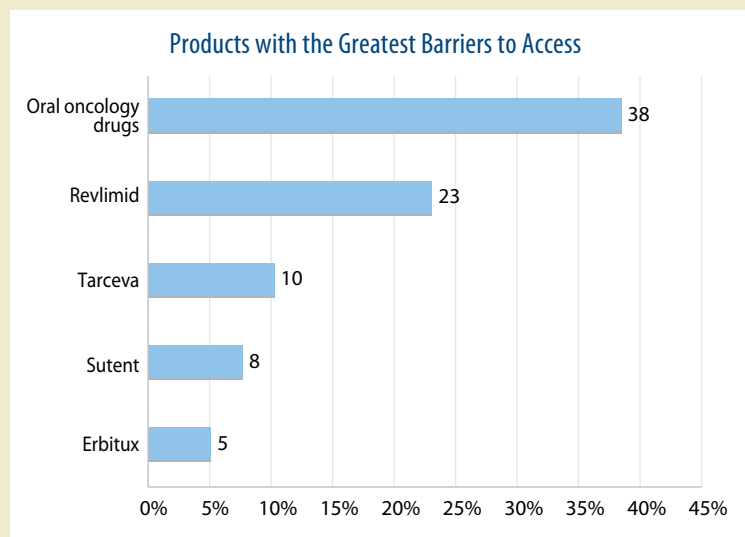
Company with the Best PAP & Reasons Why PAPs are the "Best"

When oncologists were asked to identify the best PAP, over 40% said Genentech, followed by Novartis, Celgene, Sanofi-Aventis and Amgen. Driving these best ratings are ease of enrolling patients and the liberal enrollment criteria for entry, as well as providing access to needed drugs. The companies with the worst PAPs generally had paperwork that was overly burdensome or complicated, did not deliver as promised, or had too restrictive enrollment criteria.



Products with the Greatest Barriers to Access & Patient Access is Difficult Because...

We asked community oncologists to identify those products that have the most significant barriers to access and, not surprisingly, oral oncology drugs either as a general category or with specific drug mentions accounted for nearly all the responses. This is not overly surprising because insurance coverage for injectable oncology drugs has improved over the years while oral drugs have only recently begun to emerge as commonly prescribed products. It appears that company PAPs have not helped fill the gap for many patients treated with oral drugs making this a potential area for improvement and leadership for oncology companies marketing oral cancer drugs.





Summary / Closing Remarks

So, how can a company leverage its PAP to improve its image with community oncologists? The answer may be by focusing their efforts on a different audience when discussing their PAP programs. Half of the community oncologists said that their nurse was the person responsible for assisting patients with PAP programs; another 30% said it was the office or practice manager. Only 14% said they were directly involved. So, the route to improving a company's PAP perception with community oncologists is likely an indirect one and not by focusing on the oncologist directly. Pharmaceutical and biopharmaceutical companies have another reason to operate a well-executed and generous PAP program: PAPs have the capacity to influence stakeholder perceptions of a company. Market research conducted recently with primary care physicians (PCPs) suggests that not only do PAPs have the capacity to influence stakeholder perceptions of a company's image, but they also can translate into positive behaviors on the part of physician. We would like to acknowledge and thank Ellen Gordon and Shannon Clancy for their assistance in the preparation of this article. [PC](#) [DS](#)

About The Contributors Of This Survey

MARKET STRATEGIES INTERNATIONAL

Market Strategies International is a full-service market research and consulting firm with extensive experience in the communications, energy, financial services, healthcare, and technology sectors. Market Strategies employs more than 250 senior consultants, researchers, statisticians, and project managers and specializes in the areas of customer satisfaction and loyalty, market opportunity assessment, market segmentation, message and communications testing, usability evaluation, and brand assessment and management. Founded in 1989, Market Strategies is headquartered in Livonia, MI, with regional offices in: Portland, OR; Atlanta, GA; New Providence, NJ; Little Rock, AK; Hong Kong, PRC. **Please visit www.marketstrategies.com for more information.**