

LAUNCHTRENDS®: EYLEA (US) 2012

*BioTrends Research Group is pleased to announce a new syndicated report series, **LaunchTrends®: Eylea**. This four wave syndicated primary research study will follow the launch of Regeneron's Eylea. Waves 1 through 4 track the introduction of Eylea over the months following the November 2011 launch. Reports are based on data collected at one month, three months, six months, and one year post-Eylea launch. LaunchTrends® are syndicated reports that track the trial, adoption, and usage of new products from pre-launch through one year post-launch. These report series provide information on how new products fit into the treatment algorithm, impact current therapies, and change market dynamics. They provide information on awareness, familiarity, and perceived clinical advantages and disadvantages of new products. And, they capture the promotional messages and activities of key market players.*

SAMPLE FRAME AND METHODOLOGY

Waves 1 through 3 will include responses from a random sample of 75+ retinal specialists unique to each wave; Wave 4 may include a subset of previous respondents for a total of 100+ retinal specialists

A qualitative follow up arm includes telephone interviews conducted with a sub-set of 15+ survey respondents for each wave

To qualify for participation, retinal specialists must meet the following criteria:

- In practice between 2 and 30 years
- Minimum of 50 patients with wet AMD under management
- More than 75% of time spent in clinical practice

PRODUCT COVERAGE

Eylea, Avastin, Lucentis, Macugen, Visudyne

PRICE

\$75,000 for report series bundle (Waves 1-4)
\$29,000 for single wave report purchase

RELATED 2012 REPORTS

TreatmentTrends®: AMD
TreatmentTrends®: Glaucoma
TreatmentTrends®: Diabetic Macular Edema and Diabetic Retinopathy
TreatmentTrends®: Uveitis

PROJECT OBJECTIVES

- Understand awareness of and familiarity with Eylea among retinal specialists
- Understand the perceived clinical advantages and disadvantages of Eylea compared to other marketed agents used in treating wet AMD
- Understand where Eylea is expected to fit in the treatment algorithm for wet AMD patients
- Track the trial, adoption, and usage trends including anticipated future trends for the treatment of wet AMD
- Collect information on the promotional messages and activities being employed by Regeneron

DELIVERABLES

- Final report in PowerPoint format (from each wave)
- Complete set of frequency tables, summary statistics, and cross tabulations
- Copies of telephone interviews (as audio files; blinded)
- Proprietary question slide deck and frequency tables
 - Clients purchasing prior to fielding will have the opportunity to include up to three proprietary questions in each wave

REPORT DATES

Waves	Date comments/proprietary questions are due	Field date	Publication date
1	December 23, 2011	January 6, 2012	February 9, 2012
2	March 5, 2012	March 14, 2012	April 13, 2012
3	June 4, 2012	June 13, 2012	July 13, 2012
4	November 6, 2012	November 16, 2012	December 21, 2012

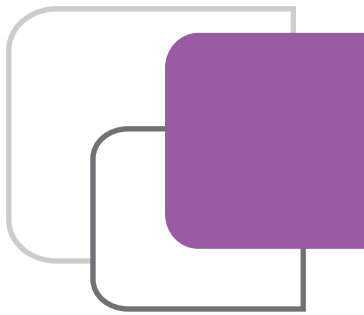


TABLE OF CONTENTS

- Background, Methods, and Objectives..... 4
- Key Findings..... 12
 - The Big Picture
 - Key Changes from Wave 1 to Wave 2
 - Differences Between Eylea Users and Non-Users
 - Benchmarking Eylea Launch Success vs. Analogs
 - Familiarity, Adoption, and Current Use
 - Current vs. Expected Future Use
 - Satisfaction with Eylea and Competitors
 - Promotional Messages
- Physician Demographics..... 20
 - Treatment Approaches for Wet AMD
- Current Treatment Algorithm..... 24
 - Limitations on Intravitreal Pharmacotherapy
- Awareness of and Familiarity with Eylea 26
 - Unaided and Aided Awareness of Products: New or in Late Clinical Development
 - Need for New Treatments in Wet AMD
 - Familiarity with Eylea and Sources of Information
 - Eylea Product Profile
 - Knowledge of Eylea Dosing, Administration, and Cost
 - Initial Reaction to and Interest Level for Eylea
 - Aspects of Eylea Profile Not Previously Known
 - Unaided Advantages of Eylea
 - Unaided Disadvantages of Eylea
 - Value of Eylea Characteristics
 - Impact of Cost and Dosing of Eylea vs. Lucentis
- Current Use of Intravitreal Therapy 38
 - Current Treatments Chosen, Total, New and Switches
 - Change in Use of Agents Prior Six Months
 - Preferred Lines of Treatment
 - Reasons for Preferred Lines of Treatment
 - Dose Schedules Currently Used
 - Typical Treatment Course

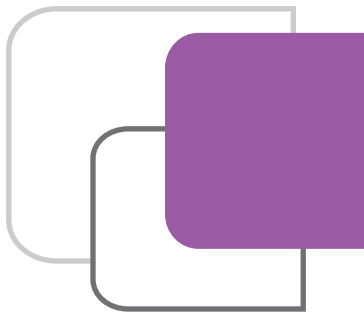


TABLE OF CONTENTS

▪ Trial and Use of Eylea	45
▪ Trial and Initial Adoption	
▪ Initial Use of Eylea by Indication	
▪ Use of Eylea in Wet AMD	
▪ Patient Requests	
▪ Switching and Adding Eylea in Wet AMD	
▪ Reasons to Use Eylea in Wet AMD	
▪ Reasons for Eylea Discontinuation	
▪ Planned Dosing Schedule for Eylea	
▪ Experience with Managed Care Approval Process	
▪ Monitoring of and Response to Treatment with Eylea	
▪ Satisfaction with Eylea Attributes	
▪ Timing of Likely use Among Non-Users	
▪ Reasons for Not Using Eylea Among Non-Users	
▪ Obstacles to Using More Eylea	
▪ Competitive Landscape in Wet AMD	60
▪ Brand Most and Least Associated with Attributes	
▪ Key Attribute Importance Rating	
▪ Eylea Performance Rating on Key Attributes	
▪ Agreement with Statements Regarding Eylea	
▪ Patient Brand Requests for Wet AMD Brands	
▪ Profit Opportunity Eylea vs. Lucentis	
▪ Promotional Messages	70
▪ Recent Sales Calls	
▪ Eylea Sales Message (Unaided and Aided)	
▪ Eylea Counter-detailing	
▪ Competitive Counter-detailing of Eylea: Frequency and Message	
▪ Advice to Regeneron Regarding Eylea Promotion	
▪ Case Studies	75
▪ Case Study #1: Patient who is treatment-resistant to Avastin	
▪ Case Study #2: Newly diagnosed patient with wet AMD in one eye	
▪ Case Study #3: Patient with good response to 1st-line Lucentis	
▪ Additional Information Desired for Eylea Prescribing Decision	
▪ Anticipated Future Treatment	86
▪ Anticipated Allocation of Treatment Approaches	
▪ Anticipated Allocation of Medical/Surgical Approaches	
▪ Anticipated Allocation of Intravitreal Pharmacotherapy Brands	
▪ Intravitreal Pharmacotherapy Brands: Eylea Users vs. Non-Users	
▪ Eylea Likely Candidates	
▪ Brands Most Likely to be Replaced by Eylea	
▪ Appendix	93