

TREATMENTTRENDS®: HEPATITIS C IN THE US 2012

TreatmentTrends® Hepatitis C (HCV) is a report that covers the use of agents for the treatment of HCV. This bi-annual report focuses on current and future use of leading interferon and development products, patient market share, perceived strengths and weaknesses of the key brands, barriers to broader usage, sales force performance and perceived value of manufacturers' patient assistance programs. In addition, assessment of the impact of newer agents such as boceprevir and telaprevir is included. TreatmentTrends® are syndicated report series that provide longitudinal information on market dynamics. They provide insight into practice patterns, attitudes and perceptions, and current and projected use of various products. They evaluate perceived product advantages and disadvantages, as well as sales and messaging efforts of key market players.

SAMPLE FRAME AND METHODOLOGY

Each report will include responses from a random sample of:

- 50 gastroenterologists, 25 hepatologists and 25 infectious disease specialists

The survey is quantitative in nature with open-ended questions for qualitative feedback

To qualify for participation, physicians have to meet the following criteria:

- Board Certified in their specialty
- In practice between 2 and 30 years
- Managing a minimum of 25 patients with HCV
- Not on a national advisory board for any of the profile companies

RELATED REPORTS

- TreatmentTrends®: Hepatitis C (EU)
- ChartTrends®: Hepatitis C
- LaunchTrends®: Victrelis and In-civek
- PatientTrends®: Hepatitis C

PRICE

\$49,500

PROJECT OBJECTIVES

- Quantify the HCV case load by patient type/severity, source of patient origination, the non-responder patient population, and the prevalence of anti-viral treatment
- Quantify the non-treated, "warehouse" Hep C population and changes in the number of HCV patients treated following introduction of the protease inhibitors
- Quantify current and anticipated future patient share of the pegylated interferons and protease inhibitors; understand perceived differences and preferences in HCV for: pegylated interferon-alpha-2a vs 2b (Pegasys vs Pegintron) and the protease inhibitors (telaprevir and boceprevir)
- Evaluate physicians' attitudes and perceptions regarding: the importance of product attributes and the performance of existing therapies against these attributes
- Understand how and why interferon use is expected to shift among physicians in the next six months for HCV; identify drivers and barriers to product adoption and broader usage
- Evaluate the importance and performance of manufacturers' patient co-pay assistance programs, company support of physicians' practices, and promotional detailing effort
- Evaluate the interest in new products in development (PSI-7977, BMS-790052 and TMC435 etc.) and assess how these products may impact the market

DELIVERABLES

- The complete report, including key findings in PowerPoint format
- Statistically significant differences of the results, where appropriate, will be highlighted
- A complete set of frequency tables, summary statistics, and cross-tabulations
- Onsite or webcast presentations are available upon request at no additional charge
- Clients purchasing prior to fielding will have the opportunity to include up to three proprietary questions in each quantitative wave of research

REPORT DATES

Report	Date comments/proprietary questions are due	Field date	Publication date
Wave 1	April 13, 2012	April 30, 2012	May 31, 2012
Wave 2	September 24, 2012	October 8, 2012	November 7, 2012

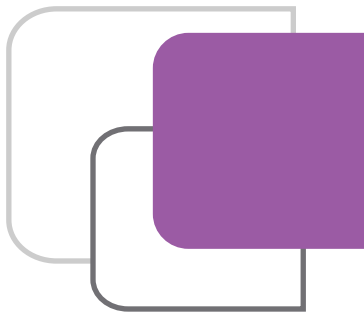


TABLE OF CONTENTS

Background, Methods, Objectives.....	4
Background on Hepatitis C	
Recent News	
Products Approved for the Treatment of Hepatitis C	
Products in Development for Hepatitis C	
Methodology	
Research Objectives	
Executive Summary.....	12
Respondent Demographics.....	20
Respondent Demographics	
Meeting Attendance and Major Takeaways	
Areas of Special Interest	
Current Medical Practice.....	25
Patient Load: Number of Hepatitis C Patients	
Presence of Co-morbidities	
Patient Demographics	
Source of Referrals for Hepatitis C	
Diagnosis of Hepatitis C	
Patients by Genotype	
Treated vs Untreated Hepatitis C Patients	
Treatment Naïve and Untreated Prior Treatment Failures	
Reasons for Not Treating Treatment Naïve Patients	
Reasons for Not Treating Prior Treatment Failures	
Patients who are Postponing Therapy Until New Options Available	
Thought Leaders	
Current Treatment of Hepatitis C.....	45
Statement Agreement	
Recent Changes in Treatment of Hepatitis C	
Current Brand Share	
Hepatitis C Patients Undergoing Treatment with Pegasys	
Hepatitis C Patients Undergoing Treatment with Pegintron	
Recent Changes in the Use of Pegasys and Pegintron	
Discontinuation from Treatment	
Brand Perceptions.....	55
Brand Overall Satisfaction	
Attribute Importance	
Stated and Derived	
Brand Performance	
Promotional Messages.....	67
Representative Contact: Pegasys and Pegintron	
Pegasys Representative Messages	
Pegintron Representative Messages	
Sales Representative Performance	
Best Sale Representative	
Best Co-Pay Program for Hepatitis C Patients	
Sources of Information	
Support Programs	

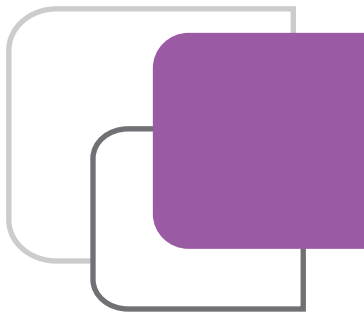


TABLE OF CONTENTS

New Treatments for Hepatitis C.....	77
Desirable Attributes in a New Agent for Hepatitis C	
Awareness of New Agents in Development	
Familiarity and Interest with Victrelis	
Source of Awareness of Victrelis	
Familiarity and Interest with Incivek	
Source of Awareness of Incivek	
Familiarity: Phase II Products	
Interest: Phase II Products	
Source of Awareness of Other Agents	
New Protease Inhibitors for Hepatitis C.....	88
Boceprevir Product Profile	
Initial Reaction and Interest Level in Boceprevir	
Brand Name Association: Boceprevir	
Perceived Advantages of Boceprevir	
Perceived Disadvantages of Boceprevir	
Attribute Performance: Boceprevir	
Telaprevir Product Profile	
Initial Reaction and Interest Level in Telaprevir	
Brand Name Association: Telaprevir	
Perceived Advantages of Telaprevir	
Perceived Disadvantages of Telaprevir	
Attribute Performance: Telaprevir	
Attribute Performance: Boceprevir vs Telaprevir	
Future Use and Market Impact of the New Protease Inhibitors.....	104
Current Warehouse Patients who are Likely Candidates for Protease Inhibitors	
Timeline for Prescribing the Protease Inhibitors	
Approach to Utilizing the Peginterferons with Protease Inhibitors	
Current and Future Share	
Pegasys High vs Low User Profiles	
Protease Inhibitor Impact on Number of Hepatitis C Patients	
Capacity to Treat Hepatitis C Patients	
Anticipated Changes to Practice to Meet Capacity Demand	
IL2B Host Genotype Testing	
IL2B Host Genotype Testing: Future Decision-Making	