

## NPS+ (EU5) [RA]

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### Abstracts

How is brand health being impacted by new RA market entrants?

The battle is on. Anti-TNF Biosimilars for rheumatoid arthritis (RA) are making their mark across Europe and we can now start to see a shift in perception amongst doctors. 'Old faithful' choices are considered against the newcomers and for some, the jury is still out. How well are established RA brands faring in the loyalty and satisfaction stakes? Which messages are resonating with doctors? And what comments are made about individual drugs by their Promoters and their Detractors?

150 rheumatologists were surveyed on key issues including brand messaging, prescribing behaviour and satisfaction levels for 12 leading RA treatments available in France, Spain, Germany, Italy and the UK. NPS+ Rheumatoid Arthritis (EU5) provides clear insight into the results, giving marketers an at-a-glance perspective on their current brand health.

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### Top Takeaways

Leaders threatened: For overall brand health, two drugs top the table in Europe. But how big is the lead and how much longer before others bridge the gap?

Allegiance is an issue: Loyalty scores reveal that doctors are likely to switch between brands. Which individual drugs are more vulnerable than the rest?

Satisfaction has a downside: The majority of doctors are satisfied with the RA

drugs on offer – but with a wide range of choices, standing out from the rest is proving difficult for some.

The biosimilar effect: What difference has the arrival of new RA biosimilars had on the rest of the market? See how Inflectra, Benepali and Remsima compare for all key measures.

A strong second: Promoters of nine brands name one other as their most common second choice – in some cases 100% of the time. Which drug is cited as a strong contender?

Loud and clear: For some drugs, specific brand messages are resonating more with doctors, even amongst Passives and Detractors. Find out what doctors are hearing or missing.

## Insight into 12 Rheumatoid Arthritis Treatments

Enbrel (etanercept; Pfizer)

Humira (adalimumab; AbbVie)

Simponi (golimumab; Merck Sharp Dohme)

Cimzia (certolizumab pegol; UCB)

MabThera (rituximab; Roche)

RoActemra (tocilizumab; Roche)

Orencia (abatacept; BMS)

Xeljanz (tofacitinib; Pfizer)

Remicade (infliximab; Merck Sharp Dohme)

Benepali (etanercept; Samsung Bioepis/Biogen)

Inflectra (infliximab; Hospira)

Remsima (infliximab; Celltrion)

## A Report Based on Expert Knowledge

We surveyed 150 rheumatologists across the EU5 (France, Italy, Germany, Spain, UK) chosen from the largest community of validated physicians in the world.

We conducted the survey between August 1st and 11th, 2017.

## Explore Important Brand Loyalty Issues

NPS+ Rheumatoid Arthritis (EU5) gives you clear and independent insight into RA brand loyalty from the doctors' perspective. You'll discover:

How satisfied doctors are with available treatments.

How loyal doctors are to your brand.

How many other brands your Promoters recommend.

Which other brands your Promoters and Detractors recommend.

How much market share your brand has among Promoters and Detractors.

How much market share you stand to gain by converting Detractors into Promoters.

Which messages Promoters, Passives and Detractors associate with your brand.

Your brand DNA: what doctors really think of your brand—in their own words.

## What is Net Promoter Score?

NPS is a customer loyalty metric developed by (and a registered trademark of) Fred Reichheld, Bain & Company, and Satmetrix. It was introduced by Reichheld in his 2003

Harvard Business Review article One Number You Need to Grow.

How does NPS work?

NPS measures overall brand satisfaction and loyalty by asking one simple question:

'How likely are you to recommend this brand to a colleague?'

Responses - given on a scale of 0 (not at all likely) to 10 (extremely likely)—are used to classify respondents into 3 categories:

Detractors are those who answer 0 – 6.

Passives are those who answer 7 – 8.

Promoters are those who answer 9 - 10.

How is NPS calculated?

The percentage of detractors - the percentage of promoters = NPS.

For example, 25% Promoters, 55% Passives and 20% Detractors give you an NPS of +5.

NPS can range from -100 (everybody is a Detractor) to +100 (everybody is a Promoter). The higher the score the healthier the brand.

What is FirstView NPS+?

NPS+ turns your Net Promoter Score into actionable information by answering key questions about brand loyalty.

Each NPS+ report examines doctors' relationships with the brands used to treat a major disease area—measuring brand loyalty and showing you how it affects your market share. NPS+ also examines “brand DNA”, revealing in doctors' own words what brands mean to them.

Instead of one simple metric, NPS+ gives you a detailed picture of brand health that

highlights areas for improvement, and helps you see exactly what steps you need to take next.

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