

Message Recall Tracking Study

*Q1 '12 Brand Presentation
May 23rd, 2012*



ZS Associates
609.419.3800 Tel
www.zsassociates.com



PLAINTIFFS TRIAL
EXHIBIT

P-25379_00001

Confidential

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The message recall study aims to answer the following key business questions

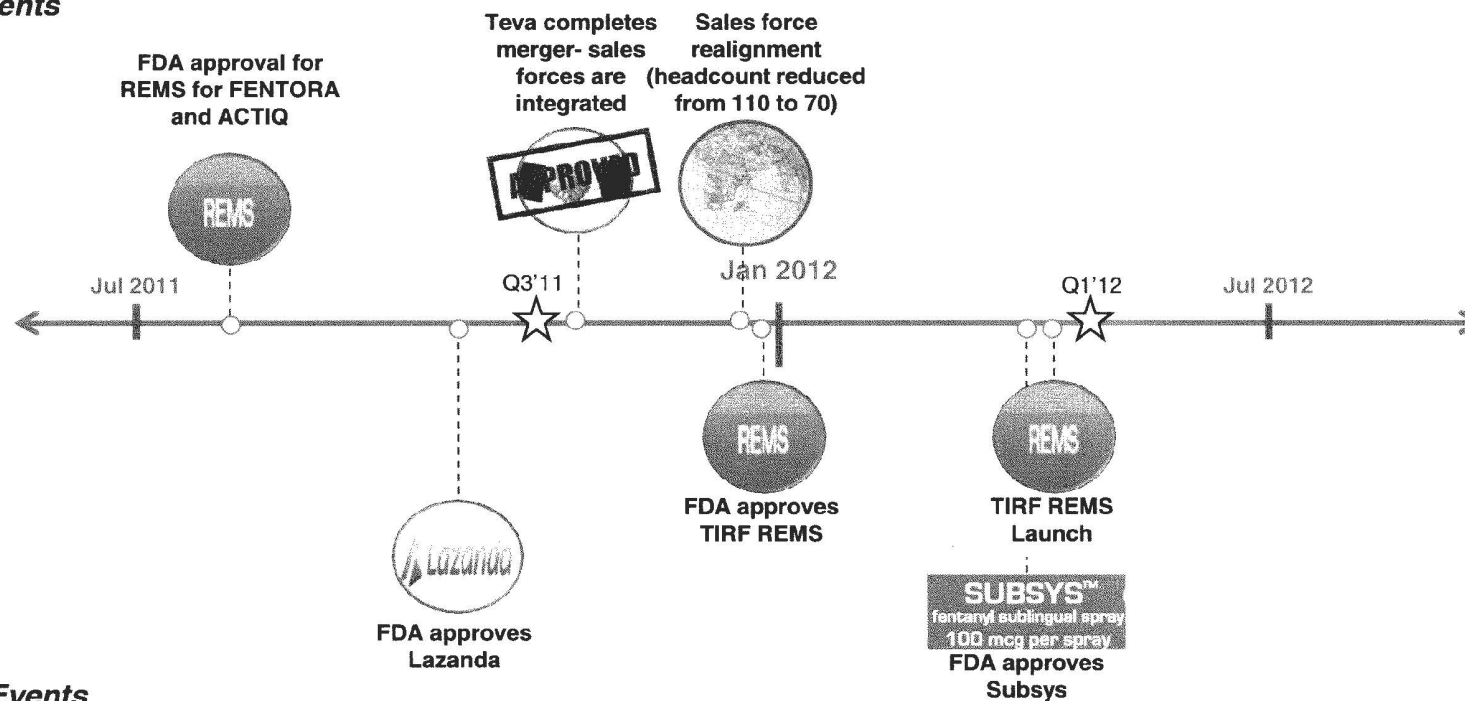


- How has physician recall of FENTORA key messages changed over time?
 - What are physician perceptions of message relevance, believability, persuasiveness and uniqueness and how have they changed over time?
 - What impact does message recall have on FENTORA perceptions?
- What impact do recently launched TIRF products (Abstral, Lazanda, and Subsys) have on FENTORA?
 - In which sales activities are competitors concentrating?
 - What are physician perceptions of the new competitors?
- What are physician perceptions of the new TIRF REMS program?
 - Are there differences between physicians who have enrolled and who have yet to enroll?
- What activities / topics are physicians recalling their FENTORA rep performing and how has this changed over time?
 - What is physician awareness / perceptions of the new FENTORA Prescription Savings Program?

Recent Teva events and changes in the pain market may have impacted FENTORA performance when comparing results over time

Recent Events and Changes

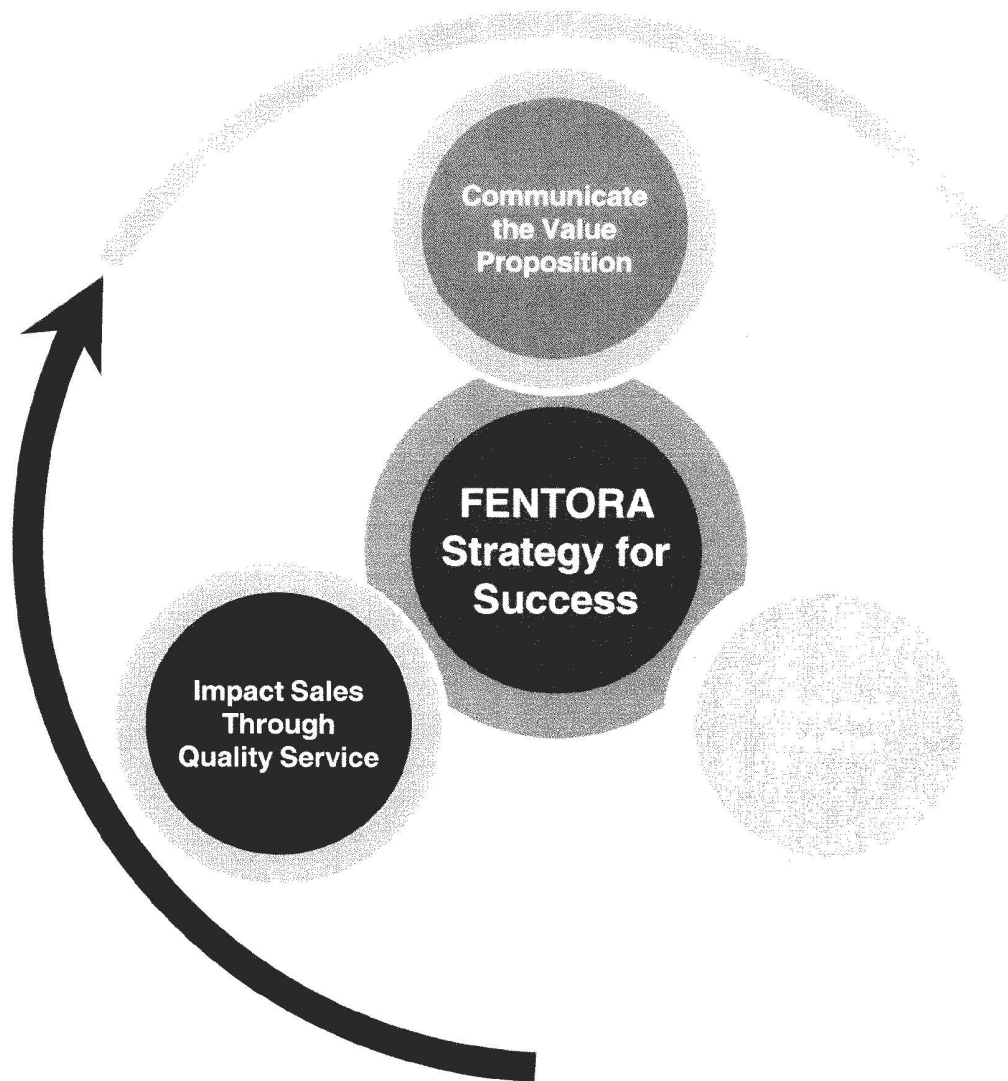
Teva Events



Market Events

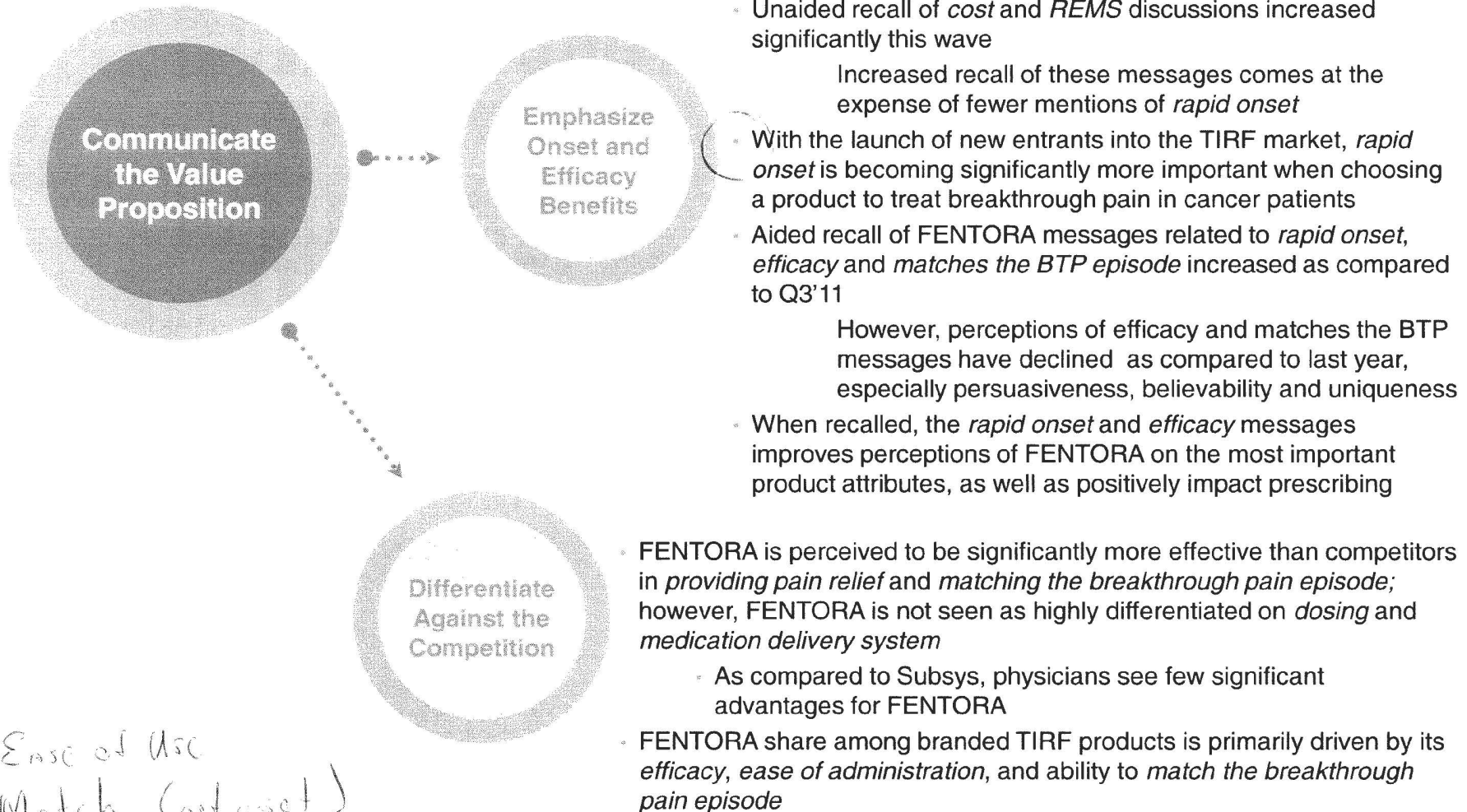
★ Indicates the analysis period for the Message Recall Study

FENTORA success hinges on three areas: saying the right messages, doing the right activities and doing it the right way



100

Key Findings



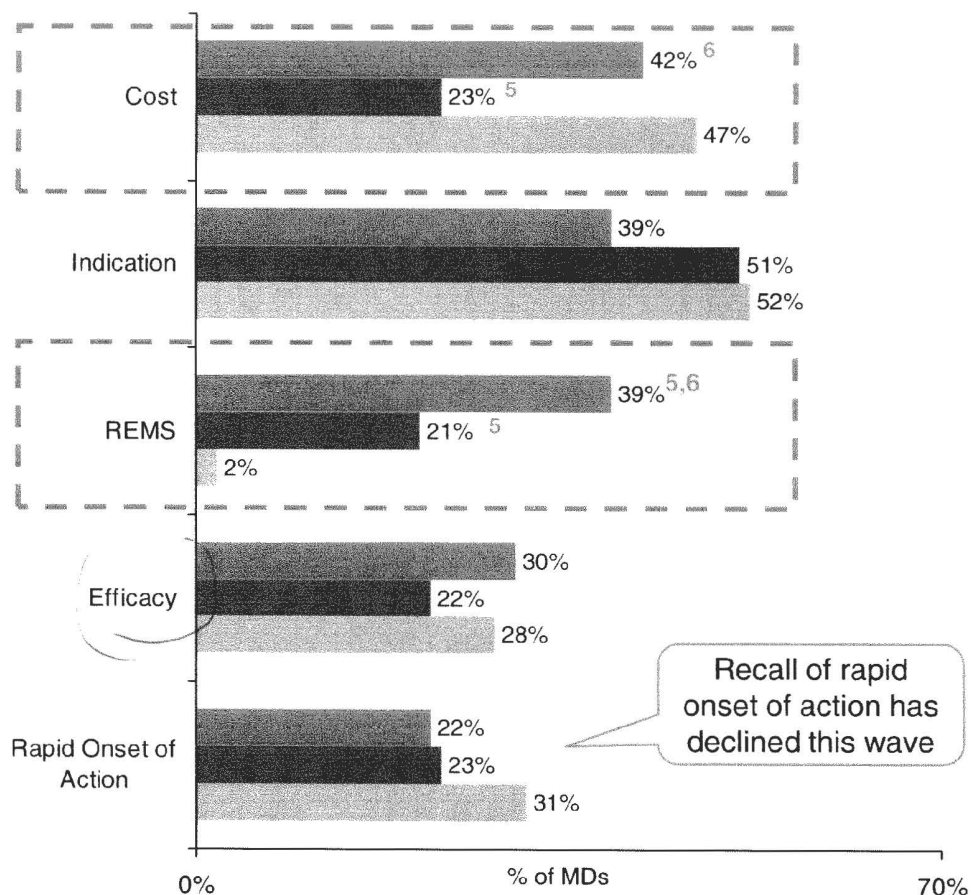
- Ease of Use
- Match (not onset)
- Efficacy

Physician top-of-mind recall of *cost* and *REMS* enrollment discussions have significantly increased this wave

Communicate
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Unaided Recall of FENTORA Messages

■ Mar '12 (7) (n=100) ■ Sep '11 (6) (n=100) ■ Mar '11 (5) (n=100)



	Mar '11 (5)	Sep '11 (6)	Mar '12 (7)
Cost			
• Formulary/insurance coverage	25%	8% ⁵	14%
• Prescription Savings Program	0%	0%	13% ^{5,6}
Indication			
• Use in breakthrough pain	23%	25%	23%
• Patient types	14%	21%	11%
REMS			
• REMS (unspecified)	0%	0%	14% ^{5,6}
• REMS enrollment	0%	0%	13% ^{5,6}
• TIRF REMS	0%	0%	6% ^{5,6}
Efficacy			
• Effective for breakthrough pain	4%	4%	15% ^{5,6}
• Effective drug	17%	11%	6% ⁵

Significant difference across waves as 5=Mar'11, 6=Sep'11

B1. During your most recent sales call for FENTORA, what exact message did the sales representative convey?

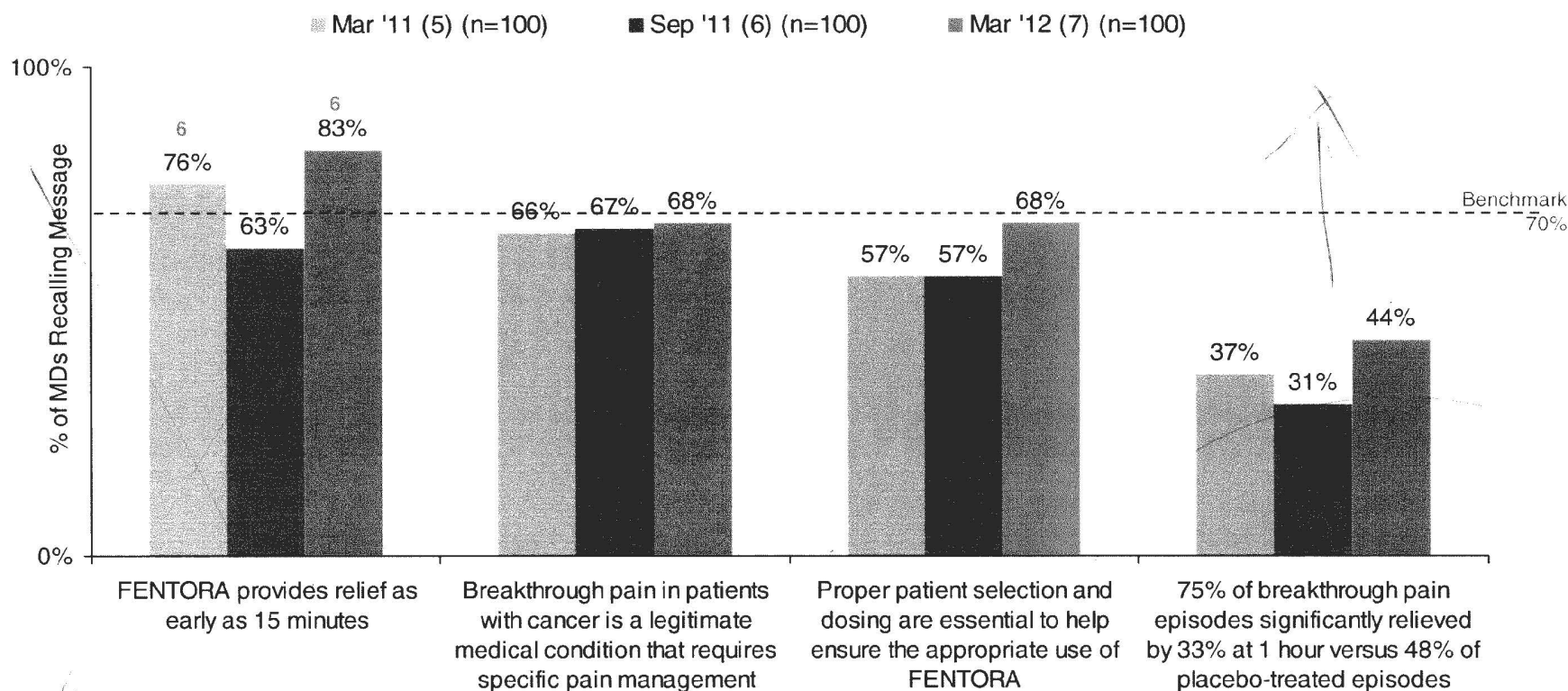
B2. During your most recent sales call for FENTORA, what other messages were brought up by the sales representative?

6

Aided recall of core FENTORA messages related to *rapid onset, patient selection and efficacy* increased as compared to Q3'11

Communicate the Value Proposition

Aided Recall of FENTORA Main Messages



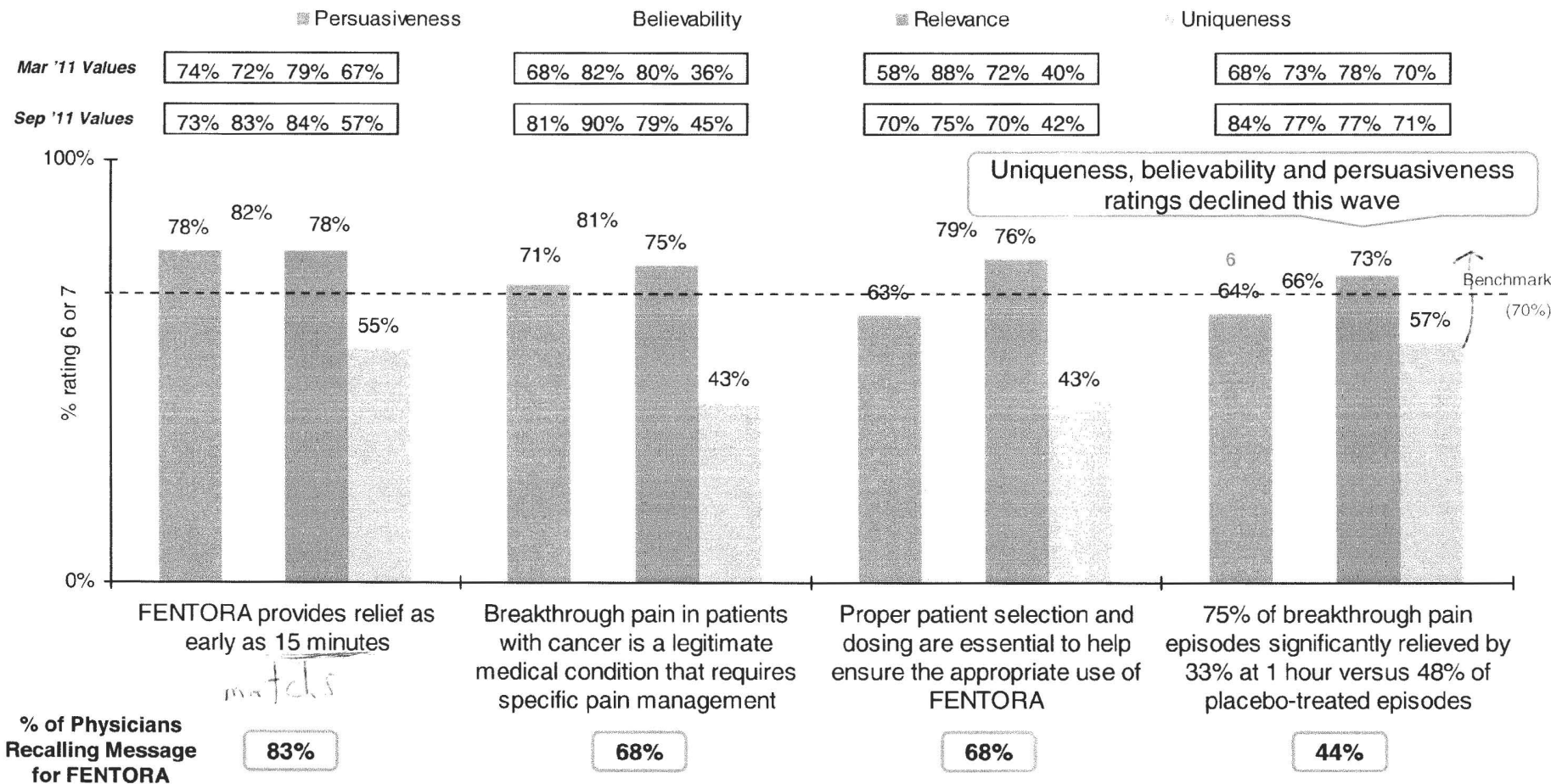
Significant difference across waves as 5=Mar'11, 6=Sep'11

D1a. During your most recent sales call with your FENTORA sales representative, which of the following messages did the sales representative specifically communicate about FENTORA? Please select all that apply.

Physicians continue to rate the FENTORA main messages as highly believable and relevant

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FENTORA Main Messages – Diagnostics (Top 2 Box) (Among MDs Recalling Message)



Significant difference ($p < 0.05$) across waves as 5=Mar'11, 6=Sep'11

D2-D5. On a scale of 1 to 7, where 1 is "not at all" and 7 is "very," how persuasive/relevant/unique/believable are each of the following messages? (n-size varies from 31-83 based on response to D1).

Recall of FENTORA's *onset* and *efficacy* messages improves perceptions of FENTORA on key product attributes

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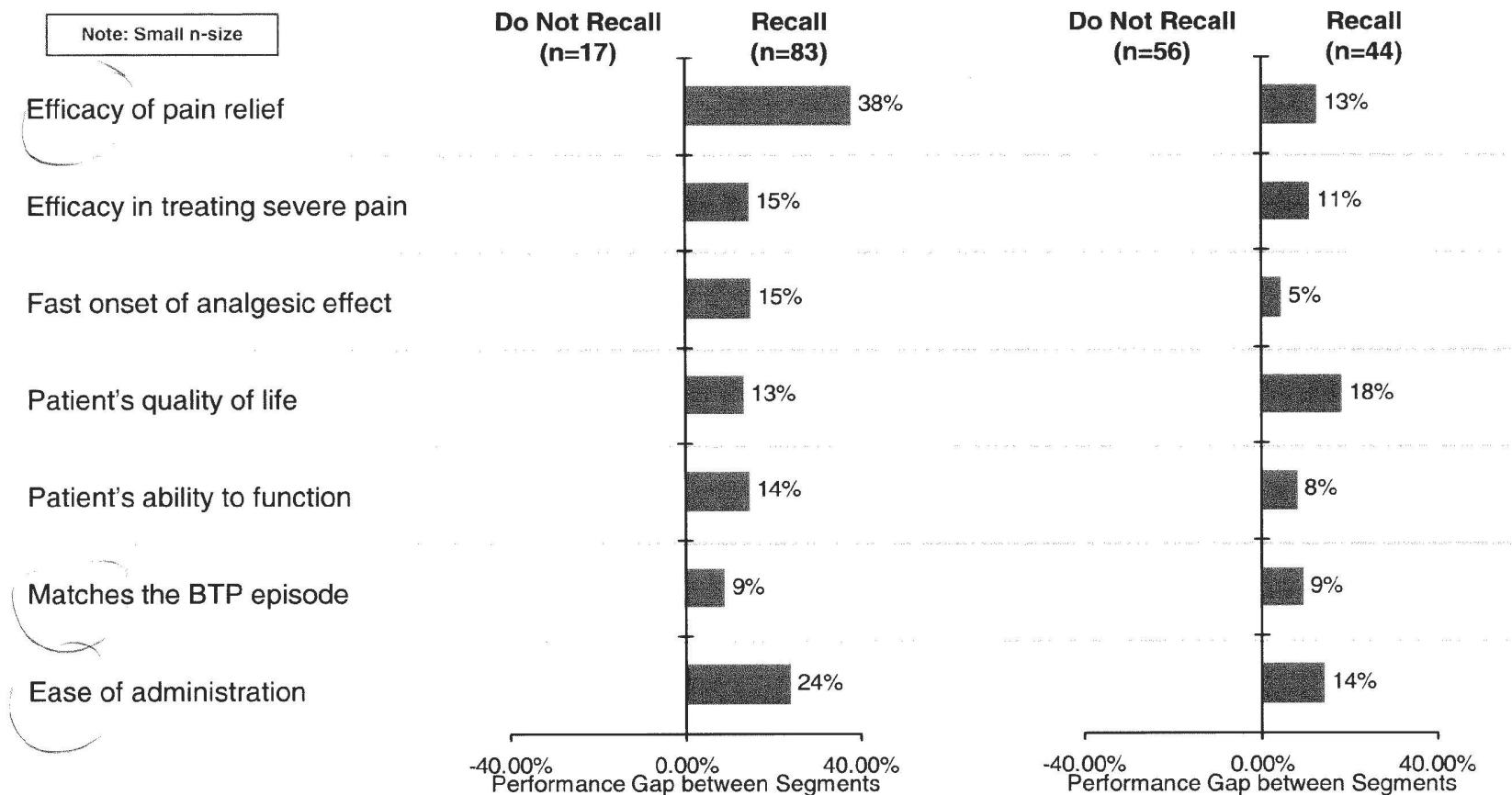
Product Perceptions - By Aided Message Recall

Product Attributes
(sorted by attribute importance)

Note: Small n-size

*FENTORA provides relief
as early as 15 minutes*

*75% of breakthrough pain episodes
significantly relieved by 33% at 1 hour
versus 48% of placebo-treated episodes*



Significant difference (p-value < 0.05) between those who recall vs. do not recall is represented by an asterisk. E5. Please rate how satisfied you are with each product's performance on the following attribute when treating breakthrough pain. D1. During your most recent sales call with your FENTORA sales representative, which of the following messages did the sales representative specifically communicate about FENTORA? Please select all that apply.

FENTORA's *patient selection* message has a positive impact on efficacy and onset perceptions

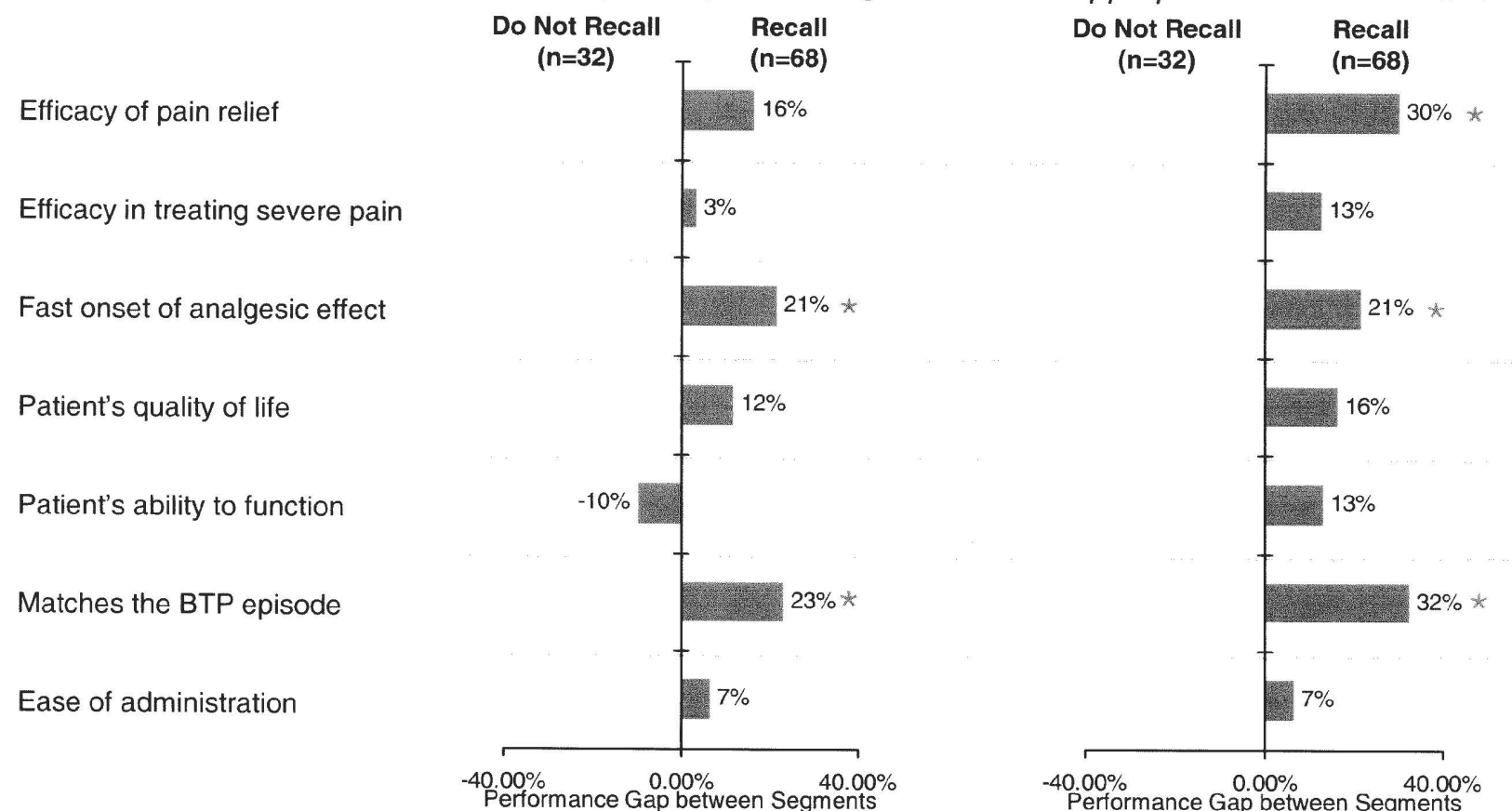
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Product Perceptions - By Aided Message Recall

*Product Attributes
(sorted by attribute importance)*

*Breakthrough pain in patients with
cancer is a legitimate medical condition
that requires specific pain management*

*Proper patient selection and dosing
are essential to help ensure the
appropriate use of FENTORA*



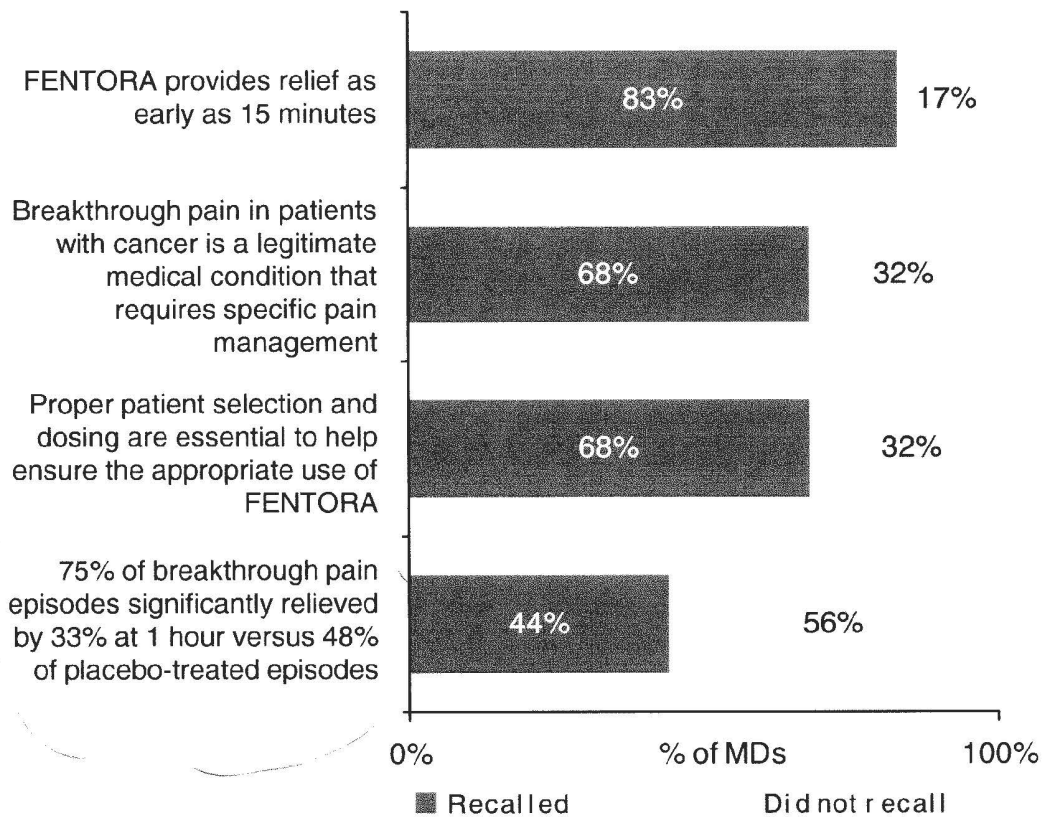
Significant difference (p-value < 0.05) between those who recall vs. do not recall is represented by an asterisk. E5. Please rate how satisfied you are with each product's performance on the following attribute when treating breakthrough pain. D1. During your most recent sales call with your FENTORA sales representative, which of the following messages did the sales representative specifically communicate about FENTORA? Please select all that apply.

10

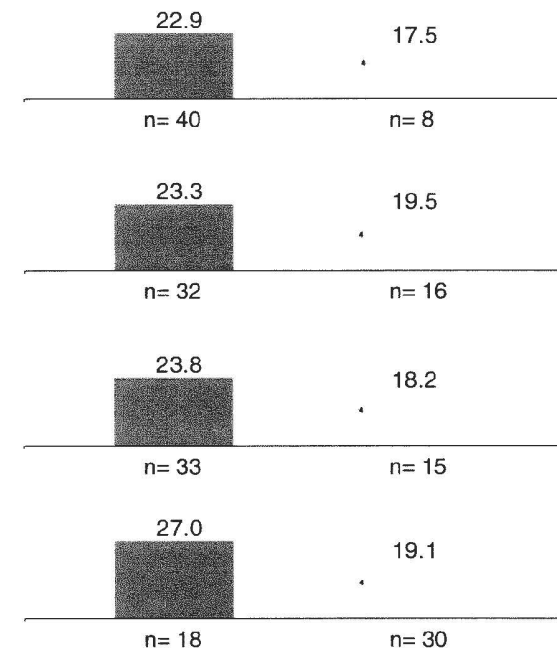
Recall of FENTORA main messages positively impacts physicians' prescribing

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FENTORA Main Messages



Corresponding Avg. FENTORA TRx (Among physicians prescribing FENTORA between Sep'11 - Feb'12)



Note: Small n-size

Statistical testing not done for n<30. Source: IMS Data (Sep'11 - Feb'12).

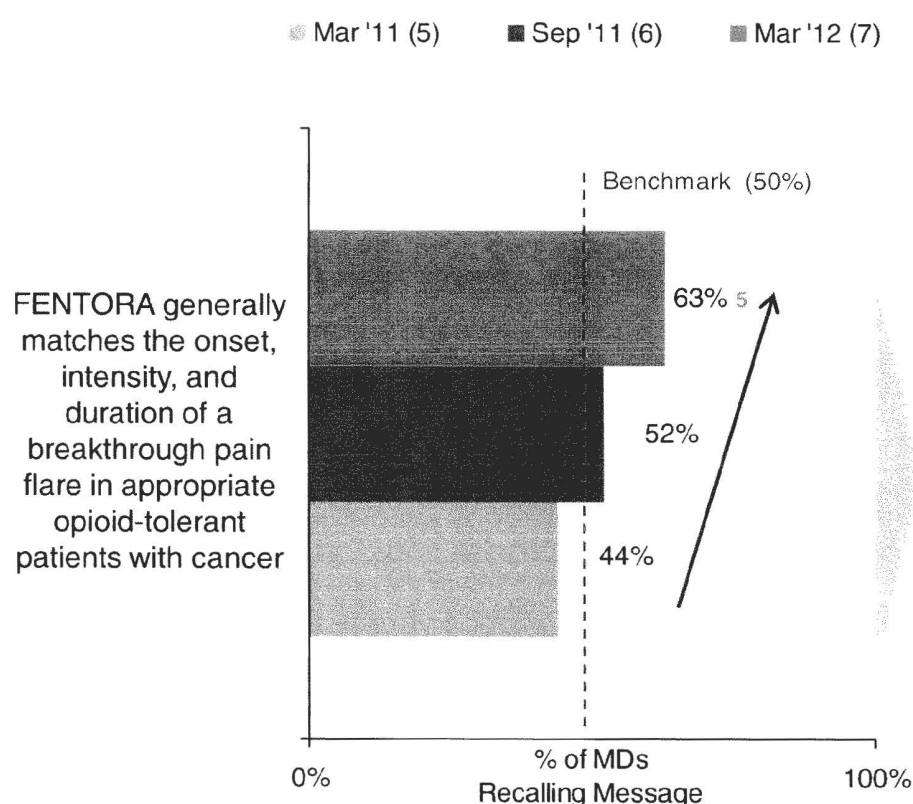
D1a. During your most recent sales call with your FENTORA sales representative, which of the following messages did the sales representative specifically communicate about FENTORA? Please select all that apply.(n=100)

Recall of the *matches the BTP episode* supporting message increased significantly as compared to one year ago; however, message diagnostics have decreased

Communicate the Value Proposition

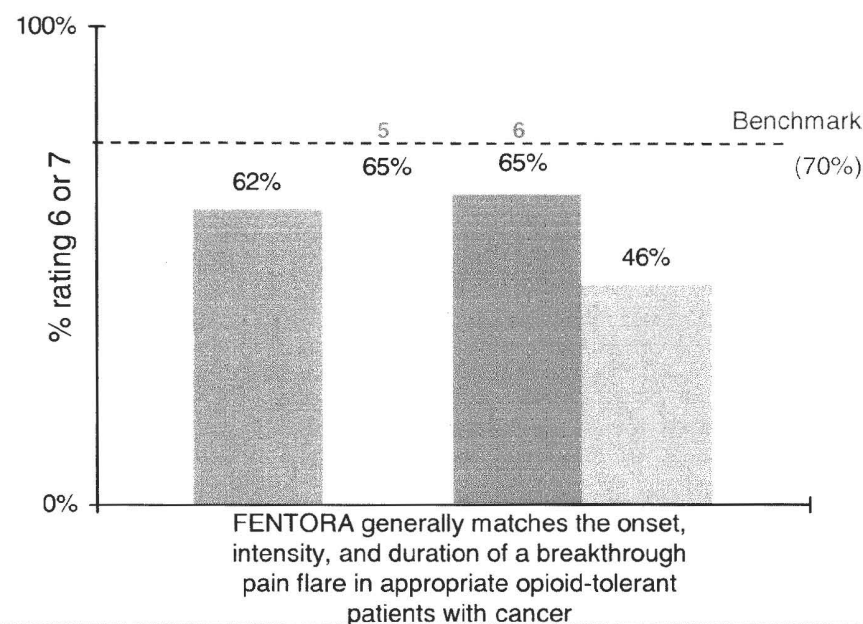
Aided Recall of the FENTORA Matches the Onset Message

FENTORA Matches the Onset Message Diagnostics (Among MDs Recalling Message)



Legend: Persuasiveness Believability Relevance Uniqueness

Mar '11 Values	75%	86%	77%	55%
Sep '11 Values	67%	75%	83%	58%



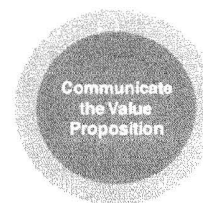
MDs recalling the *matches the onset* message have higher FENTORA TRx (24 vs. 19) as compared to those who do not recall

Significant difference ($p < 0.05$) across waves as 5=Mar'11, 6=Sep'11. Source: IMS Data (Sep'11 – Feb'12)

D1. During your most recent sales call with your FENTORA sales representative, which of the following messages did the sales representative specifically communicate about FENTORA? Please select all that apply. (n=100)

D2-D5. On a scale of 1 to 7, where 1 is "not at all" and 7 is "very," how persuasive/ relevant/ unique/ believable are each of the following messages? (n=63)

FENTORA receives significantly higher ratings on *efficacy* and *matches the breakthrough pain episode* as compared to competitors



Perception of FENTORA Compared to Competitors



FENTORA performs similarly to competitors



FENTORA significantly outperforms competitors

Product Attributes (sorted by stated importance)	Abstral (n=46)	Lazanda (n=39)	Onsolis (n=45)	Subsys (n=49)
Efficacy of pain relief	▲	▲	▲	▲
Efficacy in treating severe pain	▲	▲	▲	▲
Fast onset of analgesic effect	▲	▲	◄►	◄►
Patient's quality of life (social & emotional)	▲	◄►	▲	◄►
Patient's ability to function	▲	▲	▲	◄►
Matches the breakthrough pain episode	▲	▲	▲	▲
Ease of administration	▲	▲	▲	◄►
Dosing instructions	▲	◄►	◄►	◄►
Medication delivery system	▲	▲	◄►	◄►
Short duration of action of analgesic effect	◄►	◄►	◄►	◄►

FENTORA is not seen as highly differentiated on *dosing and medication delivery system*

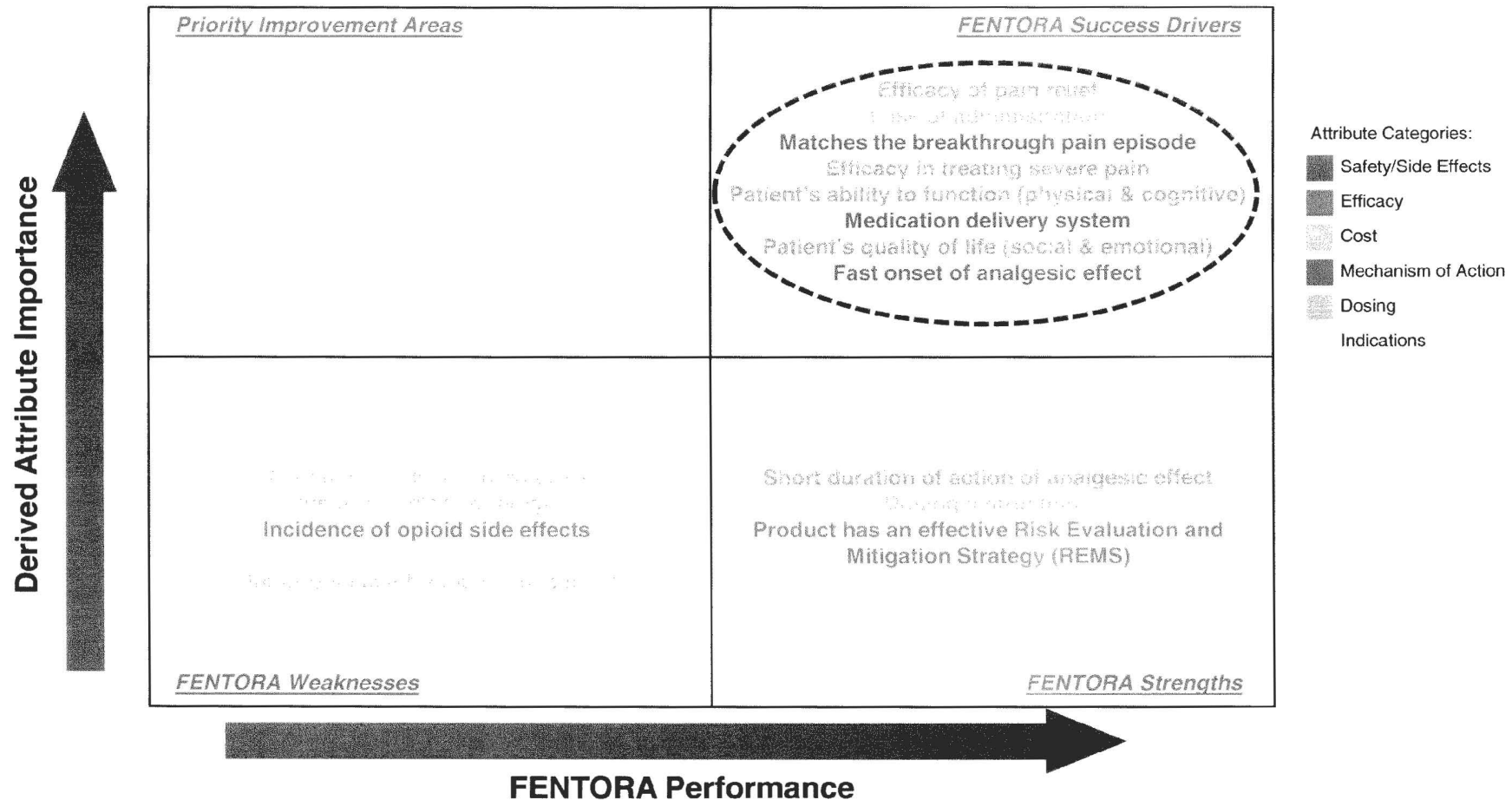
Significant difference (p-value < 0.05) with respect to FENTORA is represented by symbols. There are no attributes in which FENTORA significantly underperforms competitors. Responses are based on physicians called on by FENTORA sales reps who are part of the FENTORA target list.
E5. Please rate how satisfied you are with each product's performance on the following attribute when treating breakthrough pain.

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Efficacy, ease of administration, and ability to match the breakthrough pain episode are key drivers of share in the branded TIRF market



Drivers of FENTORA Share Among Branded TIRF Products



Axes intersect at X=50% and Y=0.20

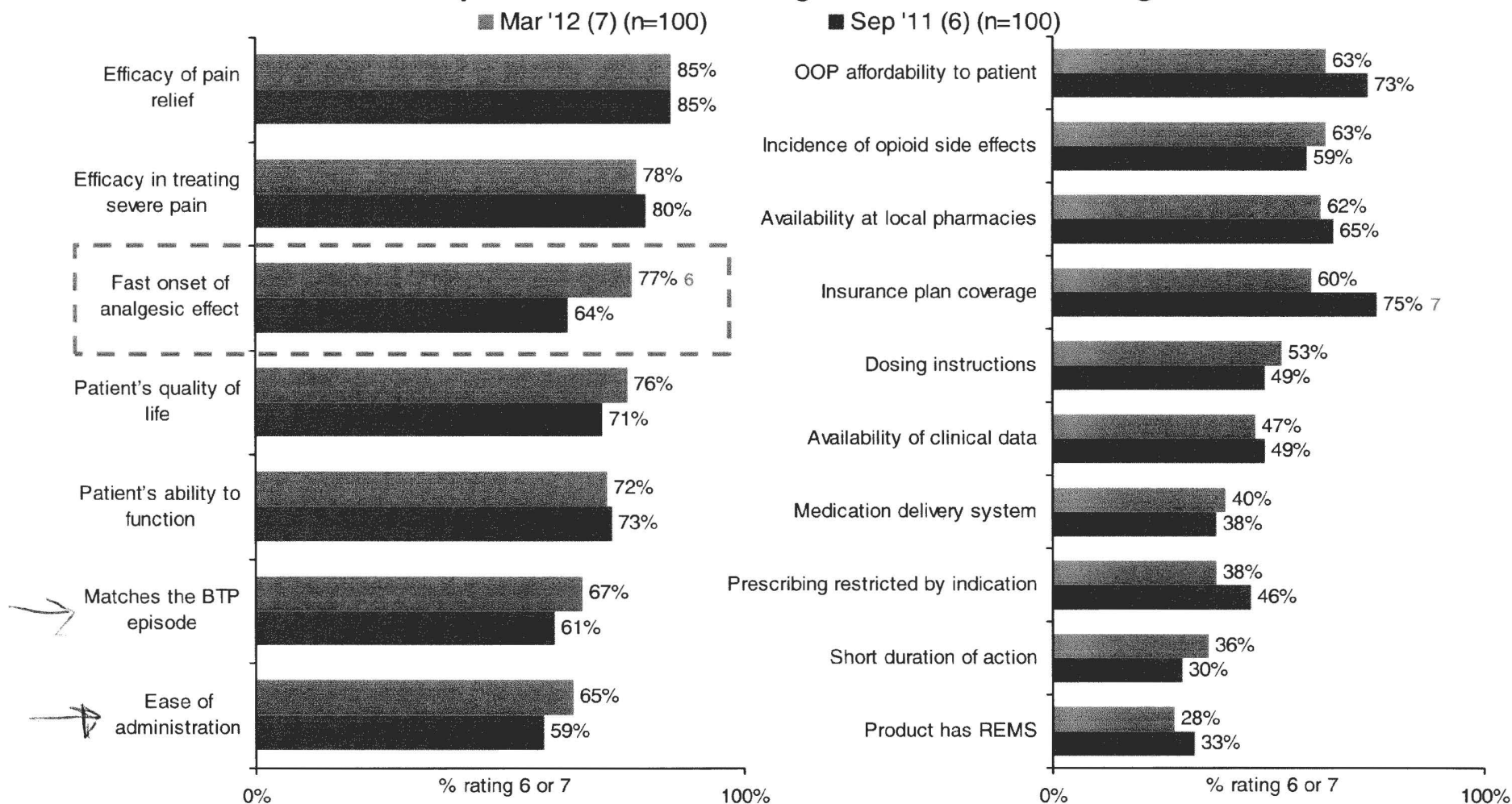
Derived Importance is based on stated FENTORA share in the last month in the branded TIRF market (FENTORA, Actiq, Abstral, Onsolis, Lazanda, and Subsys).

E5. Please rate how satisfied you are with each product's performance on the following attribute when treating breakthrough pain.(n=100)

Efficacy remains the top driver of product selection to treat breakthrough pain in cancer; with the launch of new entrants, *rapid onset* is becoming more important

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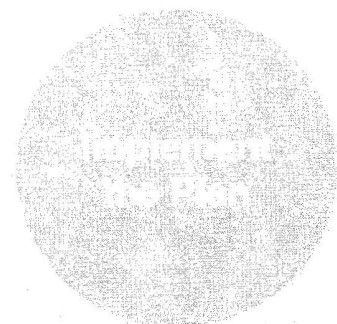
Stated Attribute Importance When Selecting Product for Breakthrough Pain in Cancer



Significant difference ($p < 0.05$) across waves as 6=Sep'11, 7=Mar'12

E4. For each attribute listed below, please indicate the importance of the attribute in your selection of a particular product to treat breakthrough pain. Please use a scale of 1 to 7, where "1" is Not at all important and "7" is Extremely important (n=100)

Key Findings



Effectively Utilize Materials

- *Interacting with office staff* remains the activity recalled most often, followed by providing materials
- Recall of materials being shared during the FENTORA detail significantly increased this wave; materials related to REMS are recalled most often
 - Physicians are more likely to recall their FENTORA rep sharing materials than competitor reps
- The use of *patient education materials* has also directionally increased this wave

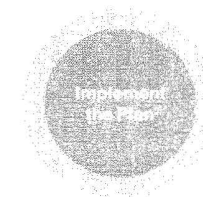
Emphasize Benefits of Prescription Savings Program

- Physicians indicate prescribing barriers for FENTORA for nearly half of their patients; *insurance coverage* remains the largest barrier, followed by *out-of-pocket cost*
 - Compared to last wave, fewer physicians recall their FENTORA rep providing cost savings materials to address out of pocket cost concerns
- Aided recall of the new FENTORA Prescription Savings Program is high; reduced cost is seen as the top benefit
 - However, approximately two-thirds of physicians are unaware of the cost to the patient for the first prescription (\$0)
- Physicians who recall the Prescription Savings Program have better cost perceptions of FENTORA and greater prescribing

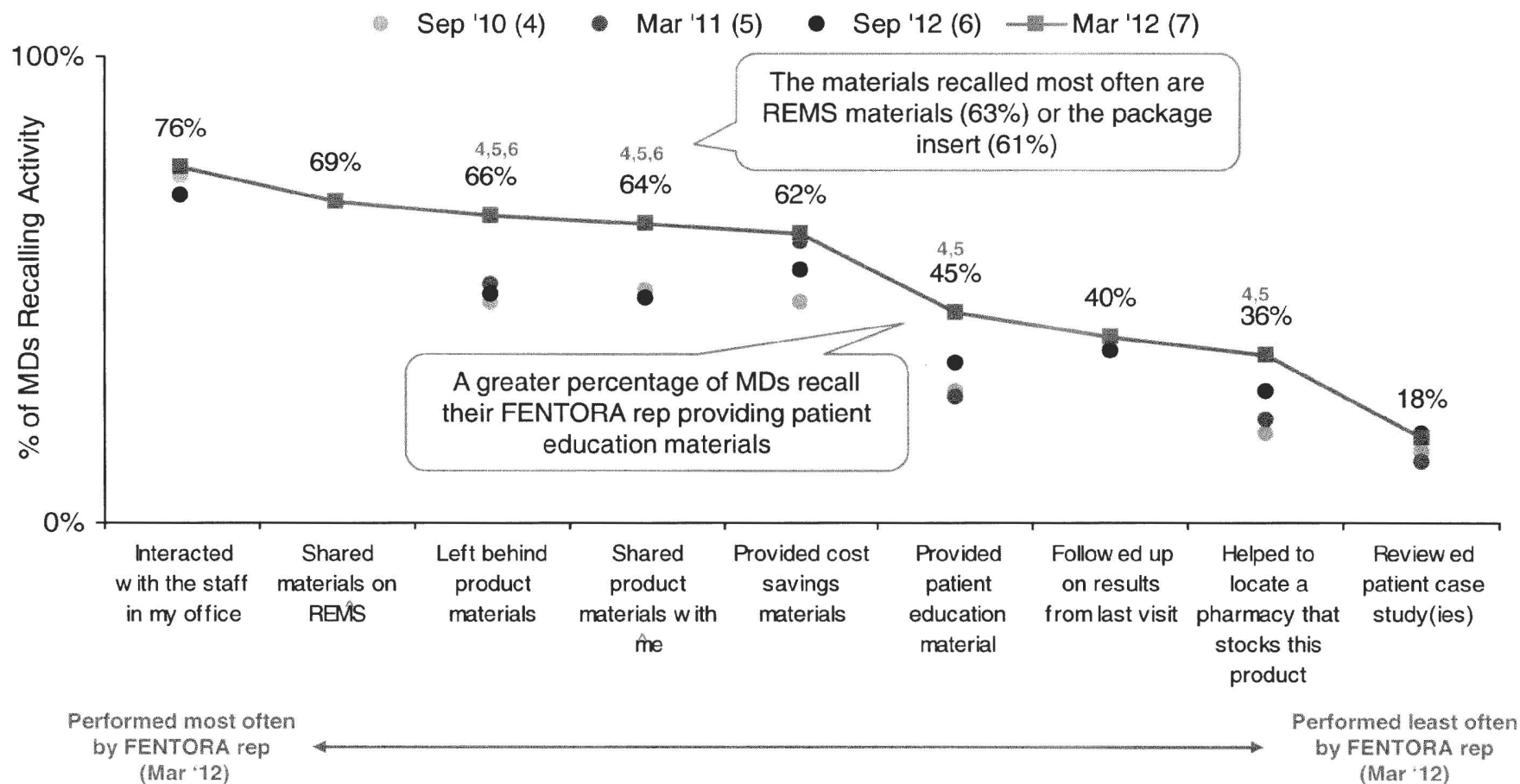
Close Any Remaining REMS Knowledge Gaps

- The majority of physicians are aware of TIRF REMS; however, PCPs tend to be less knowledgeable
 - FENTORA reps discuss REMS significantly more often than competitors, leveraging *enrollment forms* to aid the discussion
- Physicians who have already enrolled in TIRF REMS tend to have more frequent FENTORA details, write more FENTORA, and place greater emphasis on patient benefits

Use of materials during FENTORA details has significantly increased this wave, with REMS materials being recalled most often



% of MDs Recalling FENTORA Reps Performing Sales Call Activity



^ indicates option newly added in Mar'12.

Significant difference ($p < 0.05$) across waves denoted as 4=Sep'10, 5=Mar'11, 6=Sep'11 relative to the current wave.

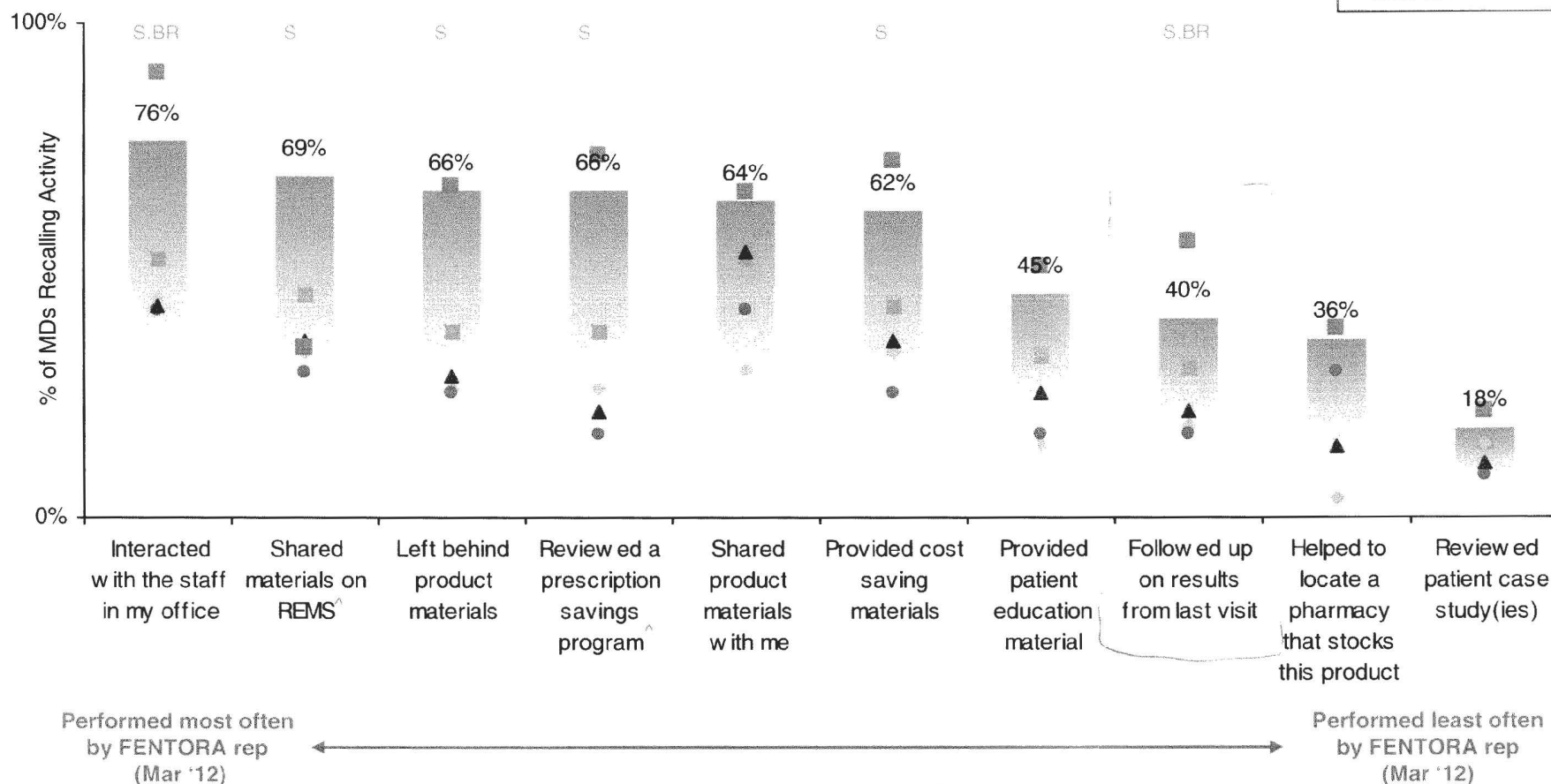
A12. During the most recent sales call for each of the following products, which of the following activities did the sales representative do during the sales calls? (n=100)

FENTORA reps outperform the competition across all key sales activities

% of MDs Recalling FENTORA Reps Performing Sales Call Activity – Current Wave

FENTORA (n=100) Subsys (n=40) Lazanda (n=27) Onsolis (n=24) Abstral (n=28) Overall Best Rep (n=79)

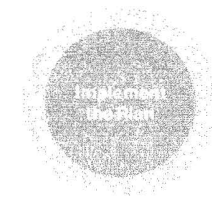
Note: Small n-size



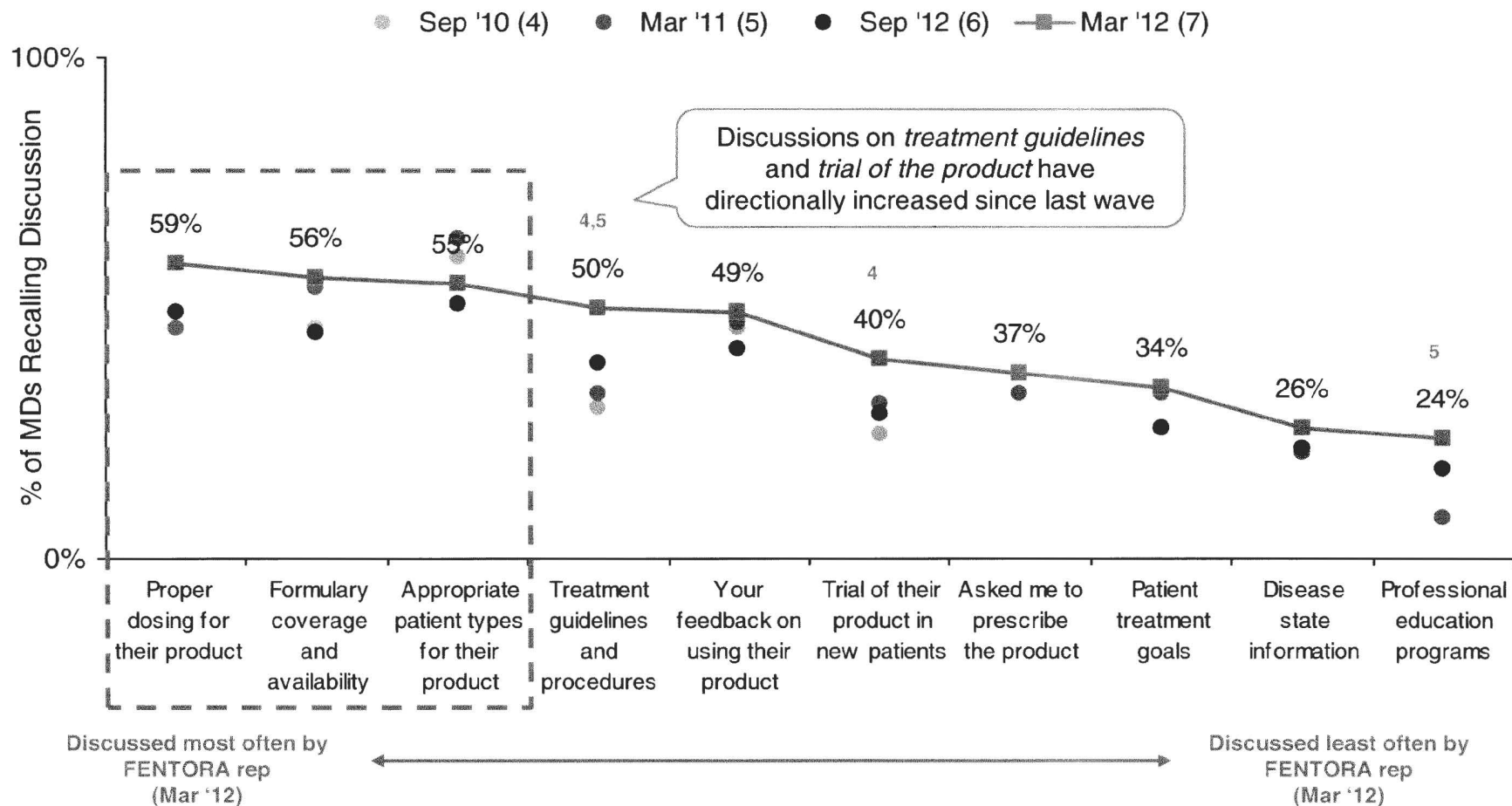
^ indicates option newly added in Mar'12. Data labels shown only for FENTORA.

Significant difference in recalled activities with FENTORA represented as S - Subsys, BR = Best Rep.. Statistical testing not conducted for products with N-size <30. A12. During the most recent sales call for each of the following products, which of the following activities did the sales representative do during the sales calls?

FENTORA discussions primarily focus on *proper dosing*, *formulary coverage*, and *appropriate patient types*, in addition to REMS



% of MDs Recalling FENTORA Reps Discussing Product Topics

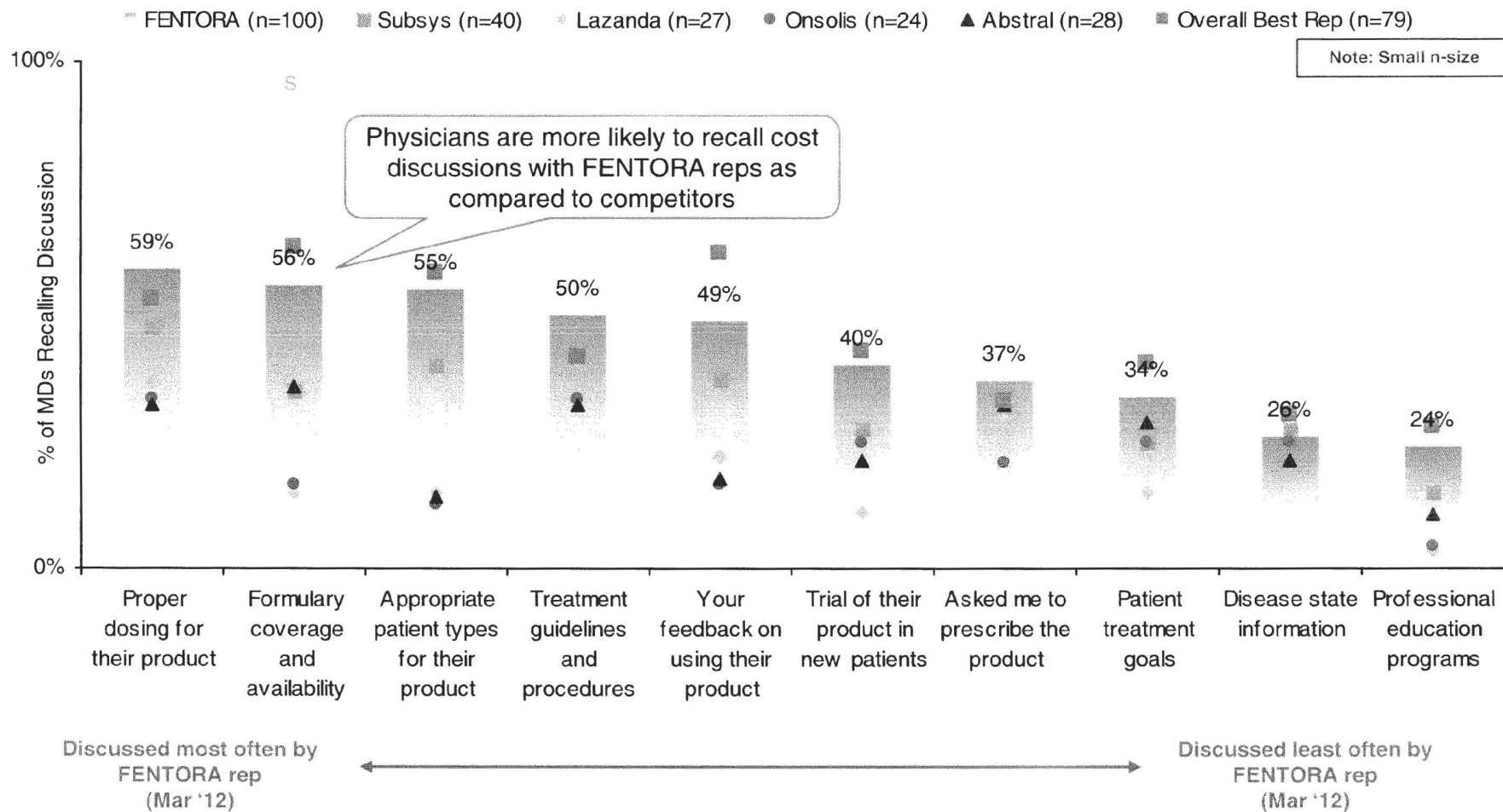


Significant difference ($p < 0.05$) across waves denoted as 4=Sep'10, 5=Mar'11, 6=Sep'11 relative to the current wave.

B3. During the MOST RECENT sales call for each of the following products, which of the following topics did the sales representative discuss during the sales call? (n=100)

Similar to FENTORA, Subsys discussions tend to focus on *proper dosing, appropriate patient types and treatment guidelines*

% of MDs Recalling Breakthrough Pain Reps Discussing Product Topics

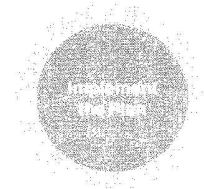


Data labels shown only for FENTORA.

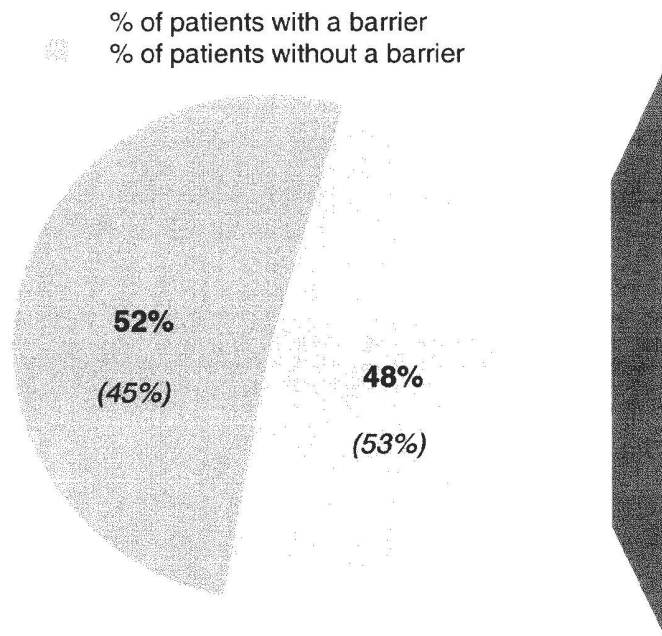
Significant difference in recalled activities with FENTORA represented as S - Subsys. Statistical testing not conducted for products with N-size <30.

B3. During the MOST RECENT sales call for each of the following products, which of the following topics did the sales representative discuss during the sales call?

Insurance coverage remains the top barrier faced by physicians when prescribing FENTORA



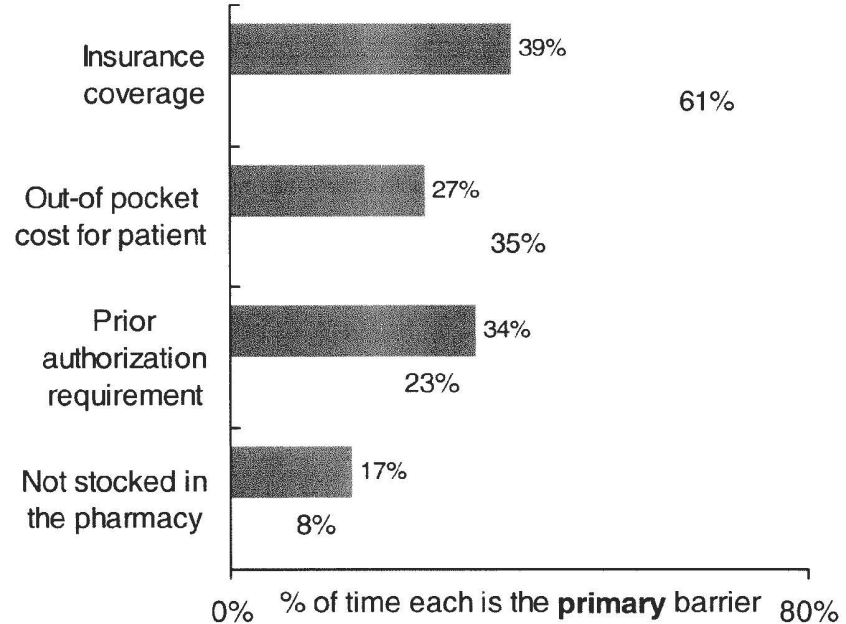
Percentage of Patients with Barriers



Primary Barriers to FENTORA Prescribing

(Among patients who face issues)

Unaided Barriers ■ Aided Barriers



Physicians experience similar barriers when prescribing other TIRF products

F5a. For what percentage of the patients that you consider prescribing each of the following products, do you experience an obstacle / issue that needs to be overcome when prescribing the product? (n=100) F5a_1. What obstacles / issues have you experienced when you considered prescribing [PRODUCT] to your patients? Please be as specific as possible. (n = 77) F5b. For the patients for whom you experience an obstacle / issue when prescribing each of the following products, how often are each of the following the primary barrier to prescribing? Please note that the values for each product should sum to at least 100%. (n = 77) F6. What did the FENTORA sales representative do during the most recent sales call to address [INSERT ANSWER TO F5b] as a barrier to your prescribing FENTORA?

Compared to last wave, fewer physicians recall their FENTORA rep providing cost savings materials to address out of pocket cost concerns

FENTORA Sales Representatives' Response to Barriers

FENTORA Sales Reps' Actions in Response to Barriers											
		Provided coupons/debit cards/vouchers (% MDs)		Reviewed formulary/insurance coverage (% MDs)		Discussed reimbursement hotline (% MDs)		Discussed the prior authorization process (% MDs)		Failed to address concern (% MDs)	
		Sep'11	Mar '12	Sep'11	Mar'12	Sep'11	Mar'12	Sep'11	Mar'12	Sep'11	Mar'12
Barrier	Insurance coverage <i>Sep '11 (n=42)</i> <i>Mar'12 (n=35)</i>	20%	20%	24%	31%	10%	6%	10%	0%	17%	23%
	Prior authorization requirement <i>Sep '11 (n=26)</i> <i>Mar'12 (n=27)</i>	4%	4%	0%	7%	19%	7% ↓	8%	15%	23%	44% ↑
	Out of pocket cost for patient <i>Sep '11 (n=24)</i> <i>Mar'12 (n=18)</i>	80%	55% ↓	0%	6%	0%	0%	0%	6%	8%	22% ↑

Note: Small n-size

Statistical testing not conducted for segments with N-size <30.

F5b. For the patients for whom you experience an obstacle / issue when prescribing each of the following products, how often is each of the following the primary barrier to prescribing?

Please note that the answers should sum to at least 100%. F6. What did the FENTORA sales representative do during the most recent sales call to address [INSERT ANSWER TO F5b] as a barrier to your prescribing FENTORA?

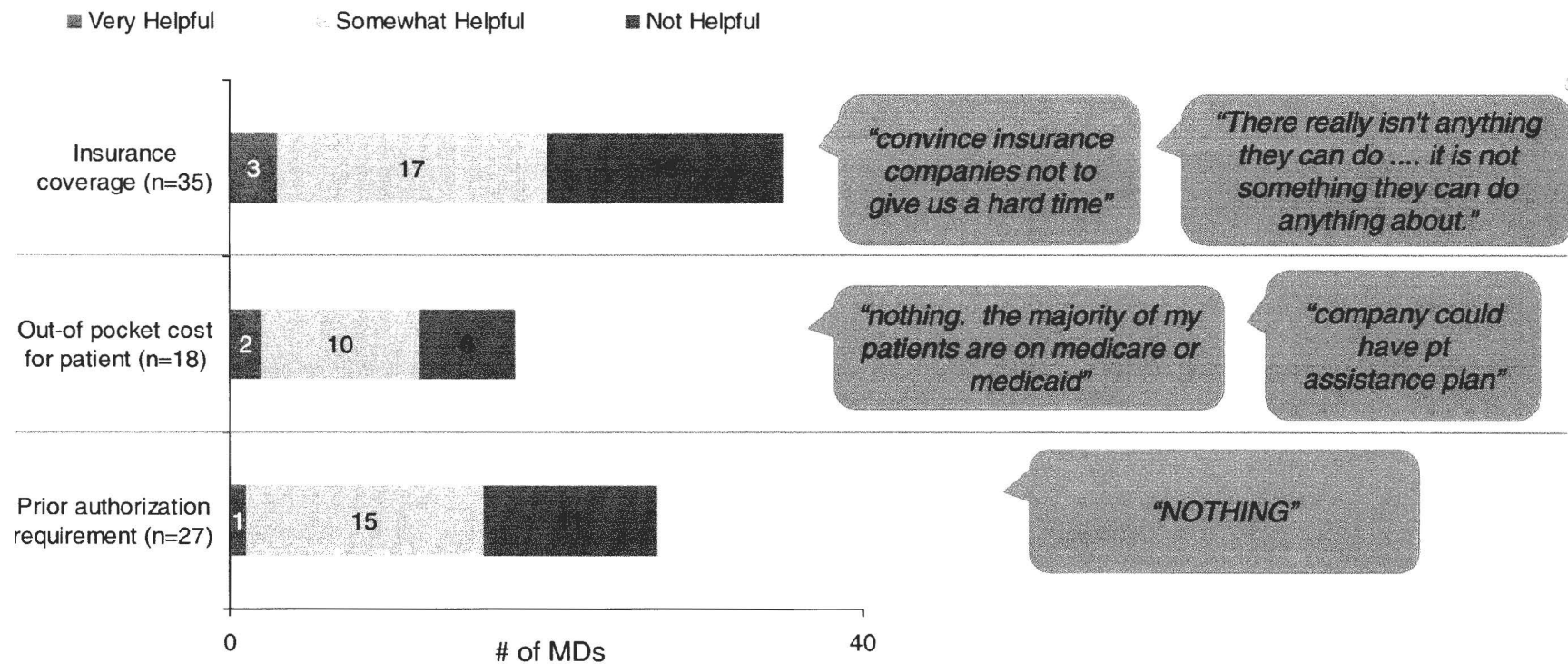
22

Physicians rating the FENTORA rep as not helpful in addressing their cost barriers also report that nothing can be done to help them



FENTORA Reps Helpfulness In Overcoming Top Prescribing Barriers

MD Recommendations to Overcome Barriers (Among those rating the rep action Not Helpful)



Note: Small n-size

Statistical testing not conducted for segments with N-size <30.

F6a. To what extent, do you think that the **FENTORA** sales representative's action helped you overcome [INSERT ANSWER TO F5b] as a prescribing barrier for **FENTORA**? Please select the most appropriate option.

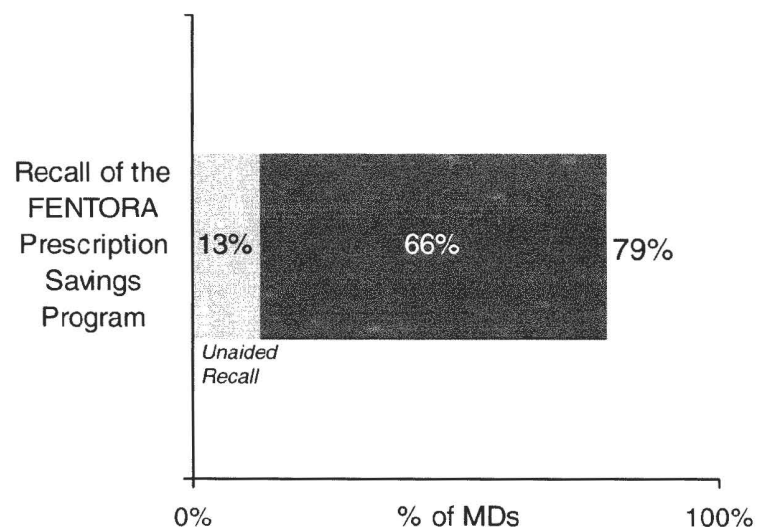
F6b. What do you think the **FENTORA** sales representative could do to help you completely overcome [INSERT ANSWER TO F5b] as a prescribing barrier?

MDs who recall the FENTORA Prescription Savings Program are directionally more likely to prescribe FENTORA

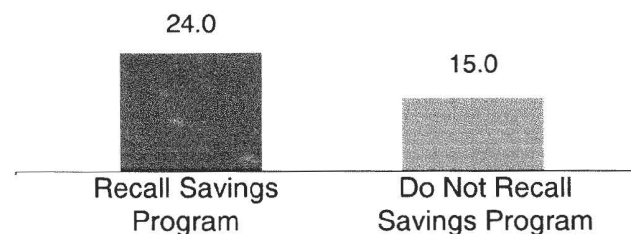


New Question

Recall of the FENTORA Prescription Savings Program



Corresponding Avg. FENTORA TRx (Sep'11 - Feb'12)



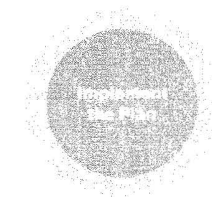
Statistical testing not conducted when n-size<30.

B1. During your most recent sales call for FENTORA, what exact message did the sales representative convey? B2. During your most recent sales call for FENTORA, what other messages were brought up by the sales representative? (n=100)

A37. Doctor, to your knowledge, which of the following rapid onset opioids are TIRF products? A39. Doctor, during your most recent sales call for FENTORA, do you recall the sales rep discussing the FENTORA Prescription Savings Program (which is the voucher/co-pay combination program)? (n=100)

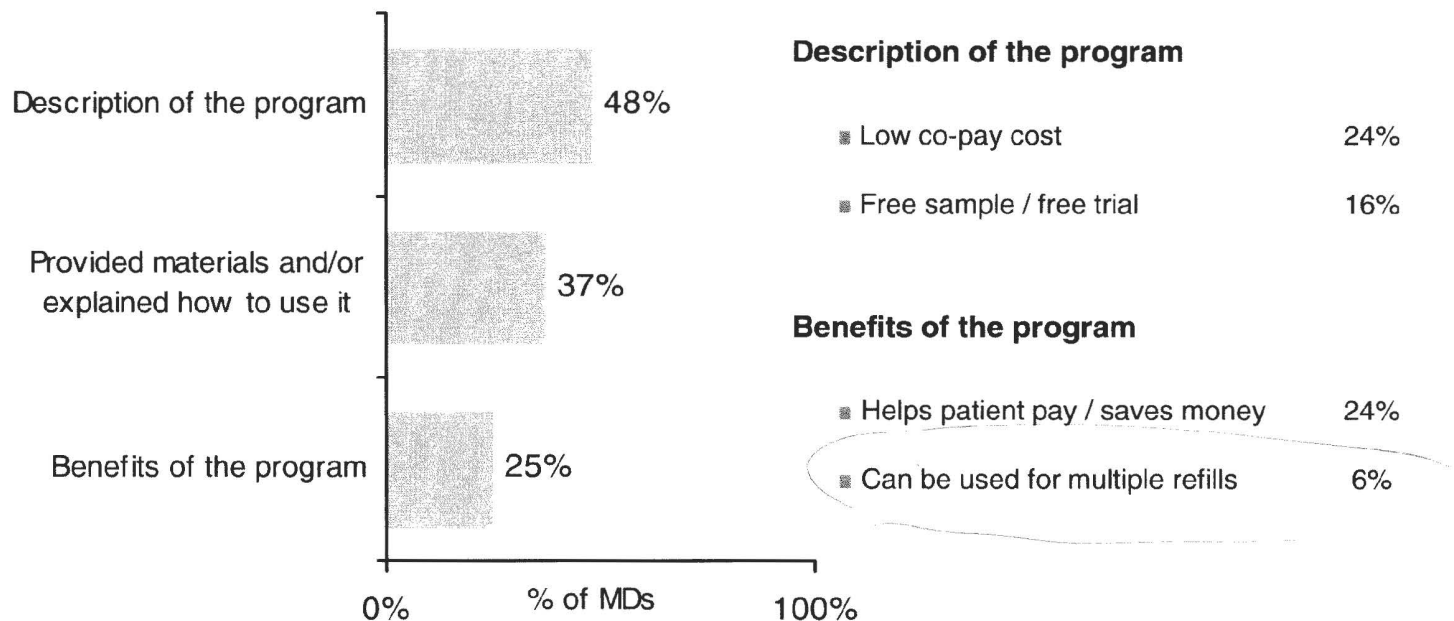
24

When recalling discussions with their FENTORA rep, MDs are most often being provided a description of the program



New Question

Unaided Recall of FENTORA Prescription Savings Program Discussion
(Among those recalling the program)



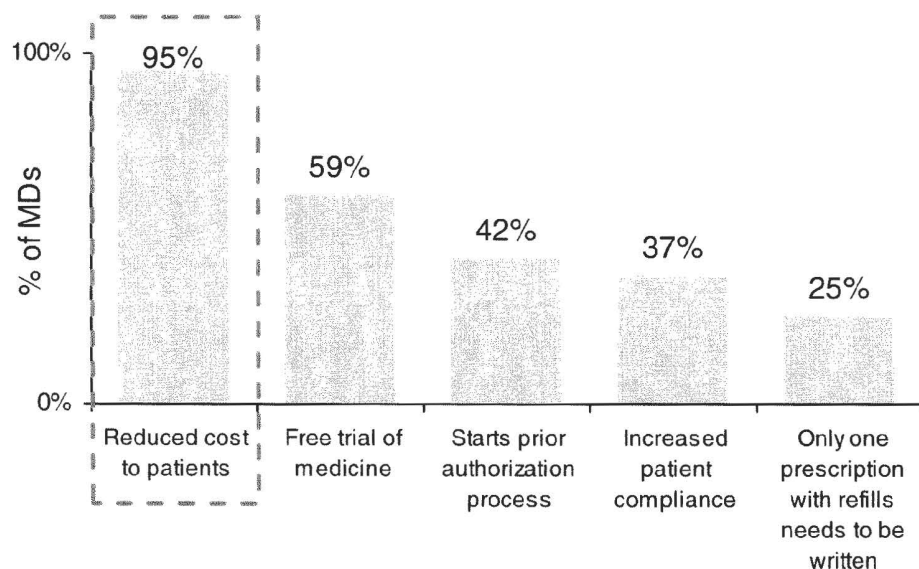
A40. Doctor, what do you recall your FENTORA sales representative discussing regarding the FENTORA Prescription Savings Program? Please be as specific as possible. (n=79)
F6. What did the FENTORA sales representative do during the most recent sales call to address [INSERT ANSWER TO F5b] as a barrier to your prescribing FENTORA?

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Nearly all consider *reduced cost to patients* to be the top benefit of the FENTORA Prescription Savings Program

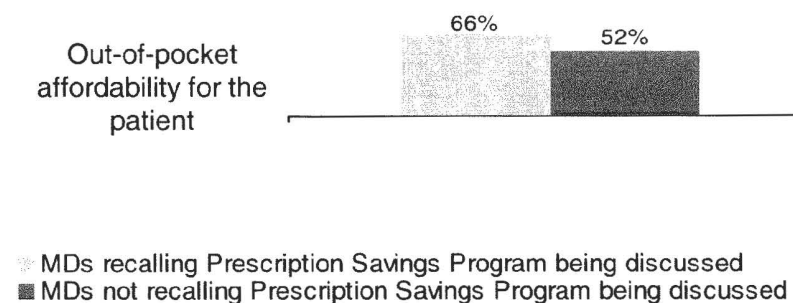
New Question

Benefits of the FENTORA Prescription Savings Program



FENTORA Cost Perceptions (% of MDs rating 6 or 7)

Out-of-pocket
affordability for the
patient



30% of physicians rated the Prescription Savings Program highly motivating in impacting them to increase their use of FENTORA when appropriate

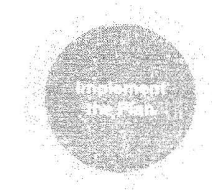
Statistical testing not conducted when n-size < 30.

A41. What do you consider to be the benefits of the FENTORA Prescription Savings Program? (n=79) A42. Doctor, how impactful is the FENTORA Prescription Savings Program in motivating you to increase use of FENTORA when appropriate? Please use a scale of 1 to 7 where "1" is Not At All Motivating and "7" is Extremely Motivating. (n=79)

E5. Please rate how satisfied you are with each product's performance on the following attribute when treating breakthrough pain in cancer patients. Please use a scale of 1 to 7, where "1" means Not at all satisfied and "7" means Very satisfied. (n=79 Recalled; n=21 Did not recall)

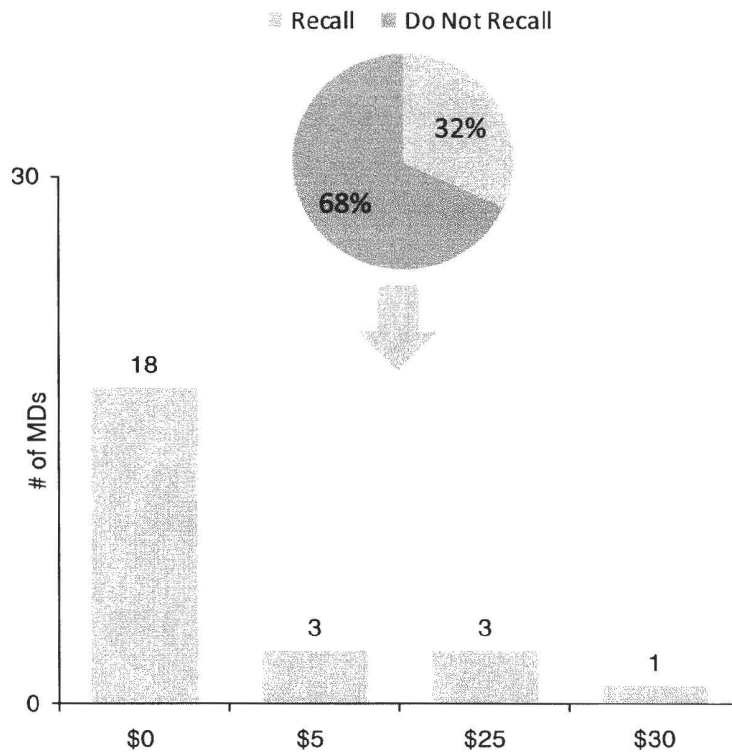
26

Less than a third of MDs are able to recall the correct dollar amount of the first prescription under the Prescription Savings Program

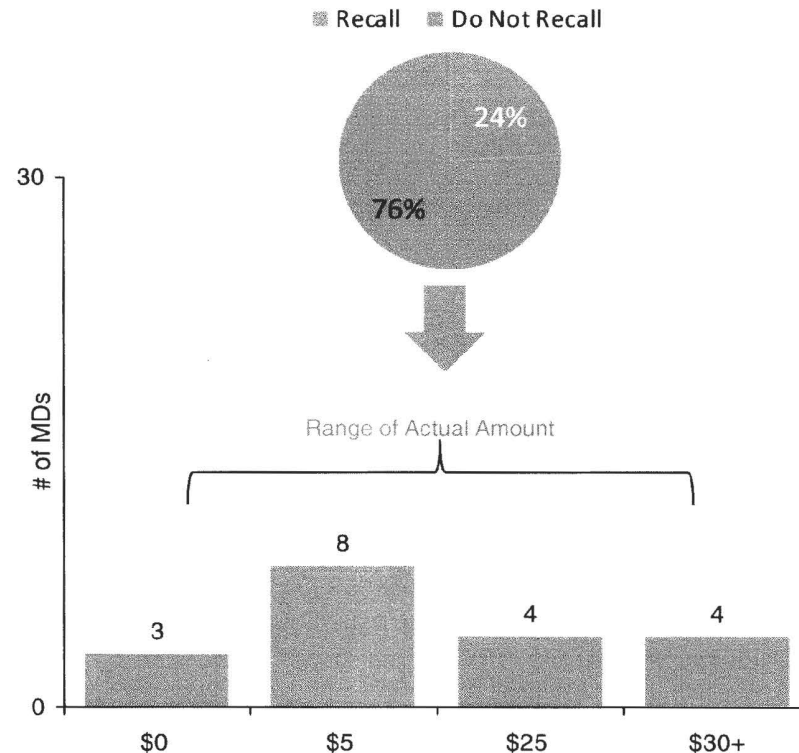


New Question

MD Recall – Cost of *First Rx* Under the FENTORA Prescription Savings Program
(Among those recalling the program)



MD Recall – Cost of *Refills* Under the FENTORA Prescription Savings Program
(Among those recalling the program)



A43. Doctor, with the FENTORA Prescription Savings Program, how much does the FENTORA prescription cost the patient? (n=79 for those who saw this question)

27

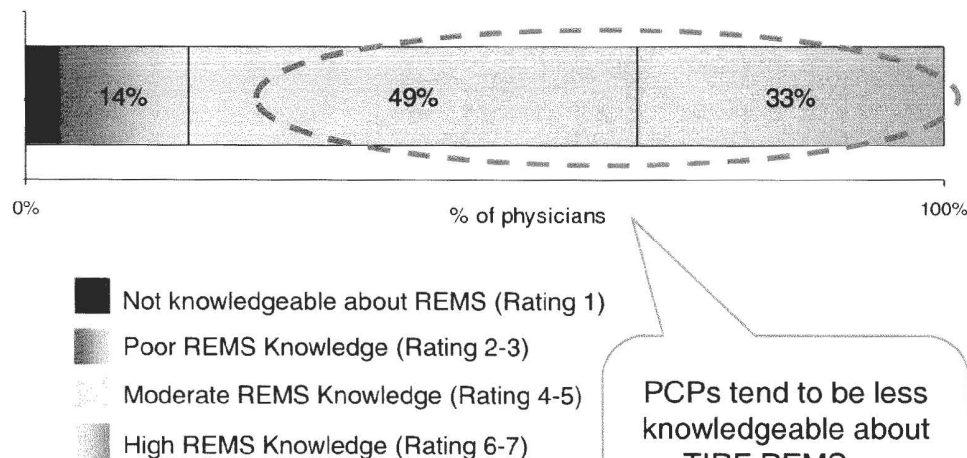
Awareness of the TIRF REMS program is high; nearly all physicians associate FENTORA with TIRF REMS



New Question

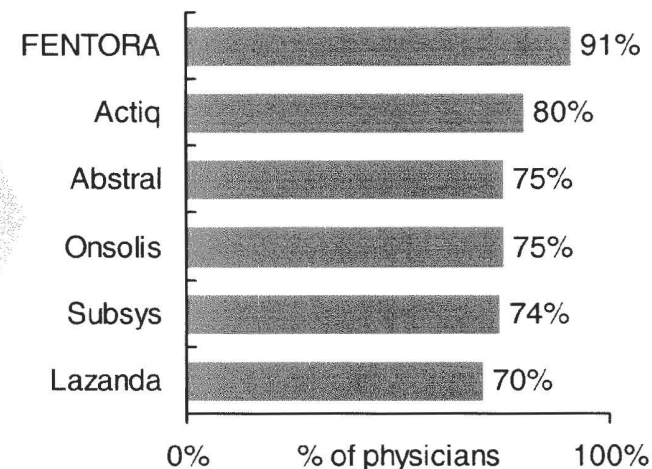
84% of physicians are aware of the TIRF REMS Access Program

Overall Knowledge of TIRF REMS Access Program (Among those physician who are aware, n=84)



PCPs tend to be less knowledgeable about TIRF REMS as compared to Specialists

Aided Physician Association with TIRF REMS

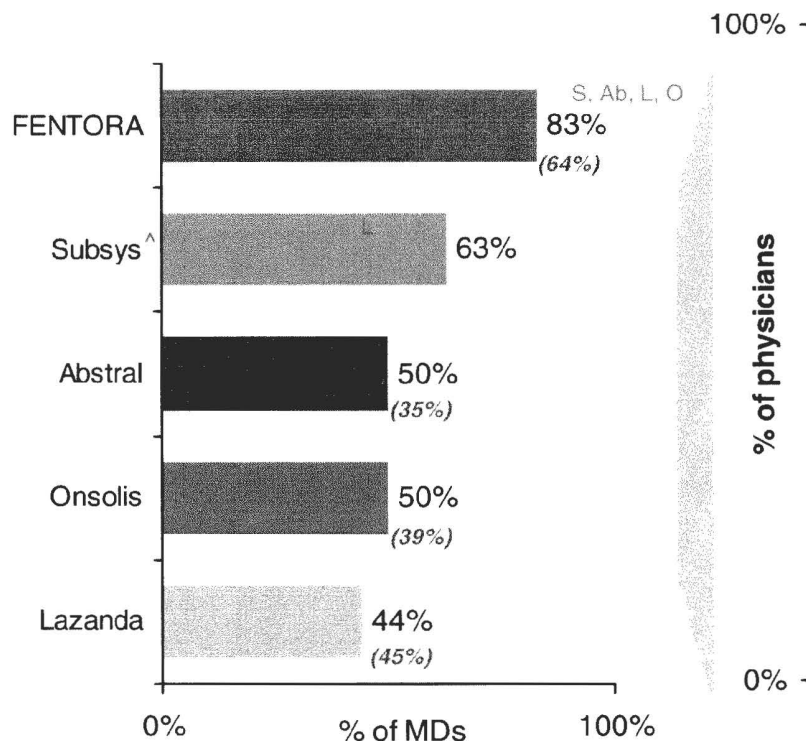


A35. Doctor, are you aware of the recently approved TIRF REMS access program? A34d. On a scale of 1 to 7, how would you describe your overall knowledge of TIRF REMS access program? Please use a scale where "1" equals Not at all knowledgeable about TIRF REMS and "7" equals I am extremely knowledgeable about TIRF REMS. A37. Doctor, to your knowledge, which of the following rapid onset opioids are TIRF (Transmucosal Immediate-Release Fentanyl) products? (n=100)

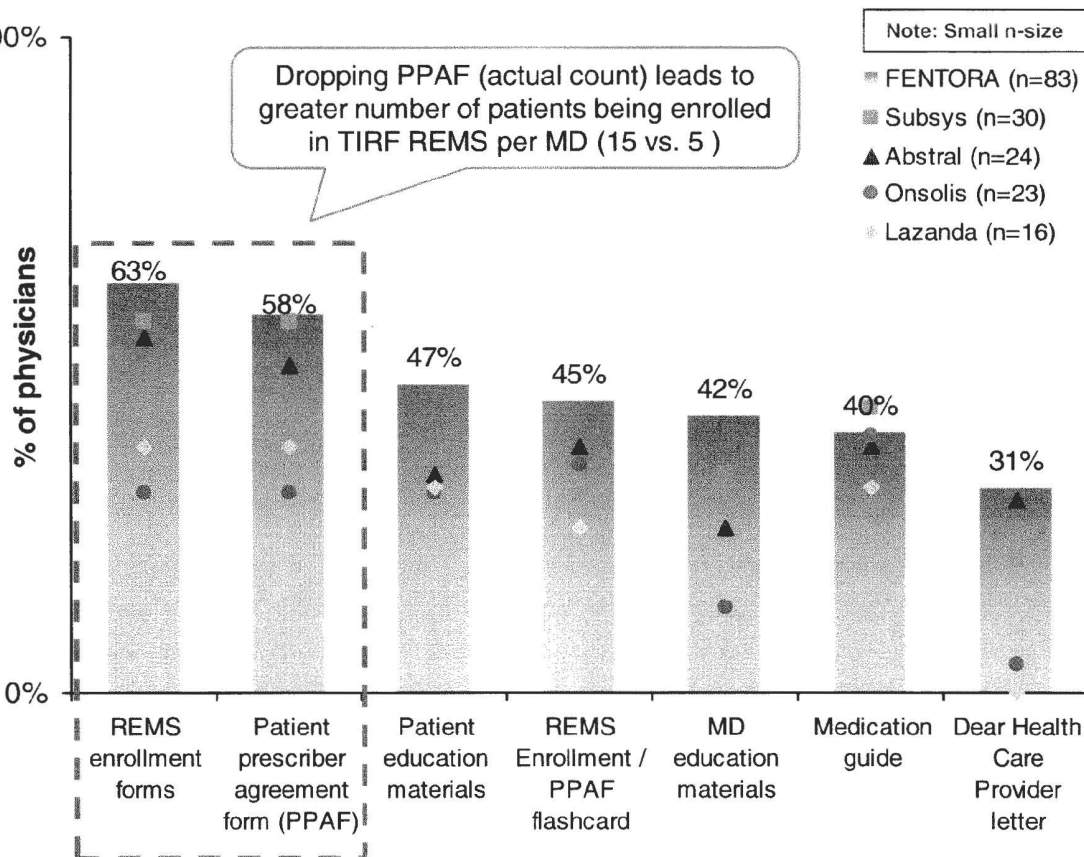
FENTORA reps discuss REMS significantly more often than the competition; *REMS enrollment forms* and *patient prescriber agreement forms* are used to aid the discussion



Physicians Recalling REMS Discussions



Materials Used to Aid REMS Discussions



[^] indicates new product added for Mar'12. Values shown in parenthesis below data labels represent Sep'11. Significant difference (p-value < 0.05) between products is represented by symbols F=FENTORA, S = Subsys, Ab=Abstral L=Lazanda O=Onsolis. A34e. Doctor, during your most recent sales call for each of the following products, did the sales representative discuss the product's REMS program?(n=100) A13a. You mentioned that during your most recent sales call for each of the following products, the sales representative discussed REMS with you. Which, if any, of the following materials did the sales representative use to aid the REMS discussion?

Physicians enrolled in TIRF REMS are more productive



Impact of TIRF REMS Enrollment

	Physicians enrolled in TIRF REMS access program (n=68)	Physicians not enrolled in TIRF REMS access program (n=32)
FENTORA Rep Actual Call Frequency (avg. per month)	3.9 *	1.9
% MDs recalling REMS Materials Shared	75%	56%
% of MDs with high REMS Knowledge	35% *	12%
% of TIRF Prescribers (Last 6 months)	72% *	31%
Avg. TRx among prescribers Note: Small n-size	46.0	6.2
% of MDs rating Patient Benefits attribute highly		
Patient's ability to function (physical & cognitive)	78%	59%
Patient's quality of life (social & emotional)	81%	66%

**REMS sales call activities &
longer frequent details**

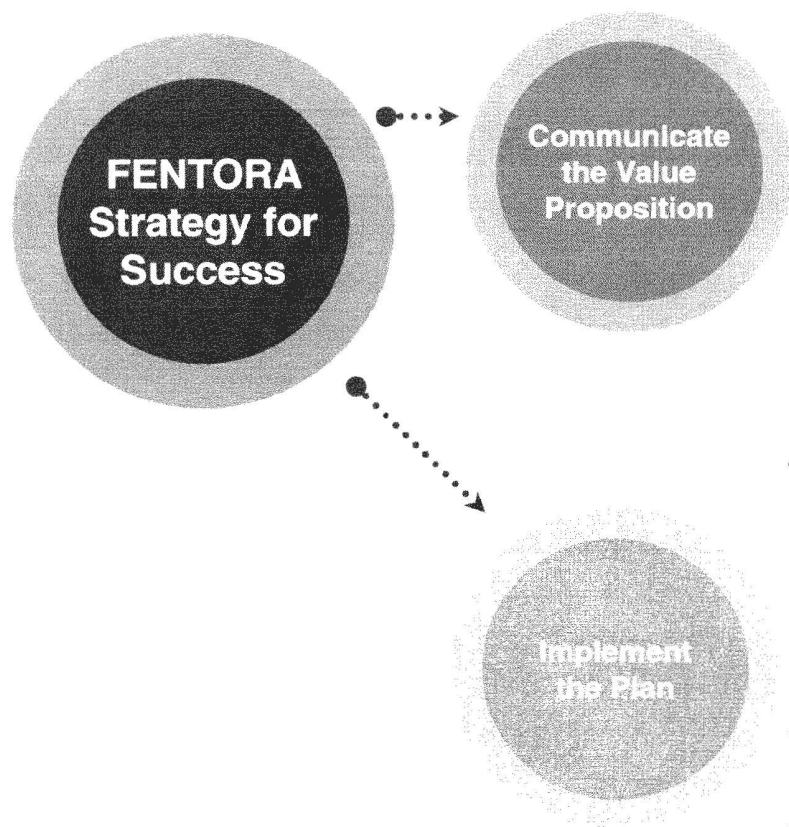
High REMS knowledge

REMS Enrollment

Significant difference (p-value < 0.05) between segments is represented by an asterisk. Significance testing not done for segments with n-size < 30. A12. During the most recent sales call for each of the following products, which of the following activities did the sales representative do during the sales call? A34d. On a scale of 1 to 7, how would you describe your overall knowledge of TIRF REMS access program? E4. For each attribute listed below, please indicate the importance of the attribute in your selection of a particular product to treat breakthrough cancer pain. Actual Call & TRx data obtained from Teva Secondary data (Sep'11 – Feb '12)

30

Implications and Recommendations



- Emphasize *efficacy* and *rapid onset* benefits, in addition to discussing *indications* and *REMs*, as these are key drivers of branded TIRF share
- Continue to monitor Subsys performance, as it appears to be the greatest threat to FENTORA given similar performance on product attributes and the level of activity by the sales force

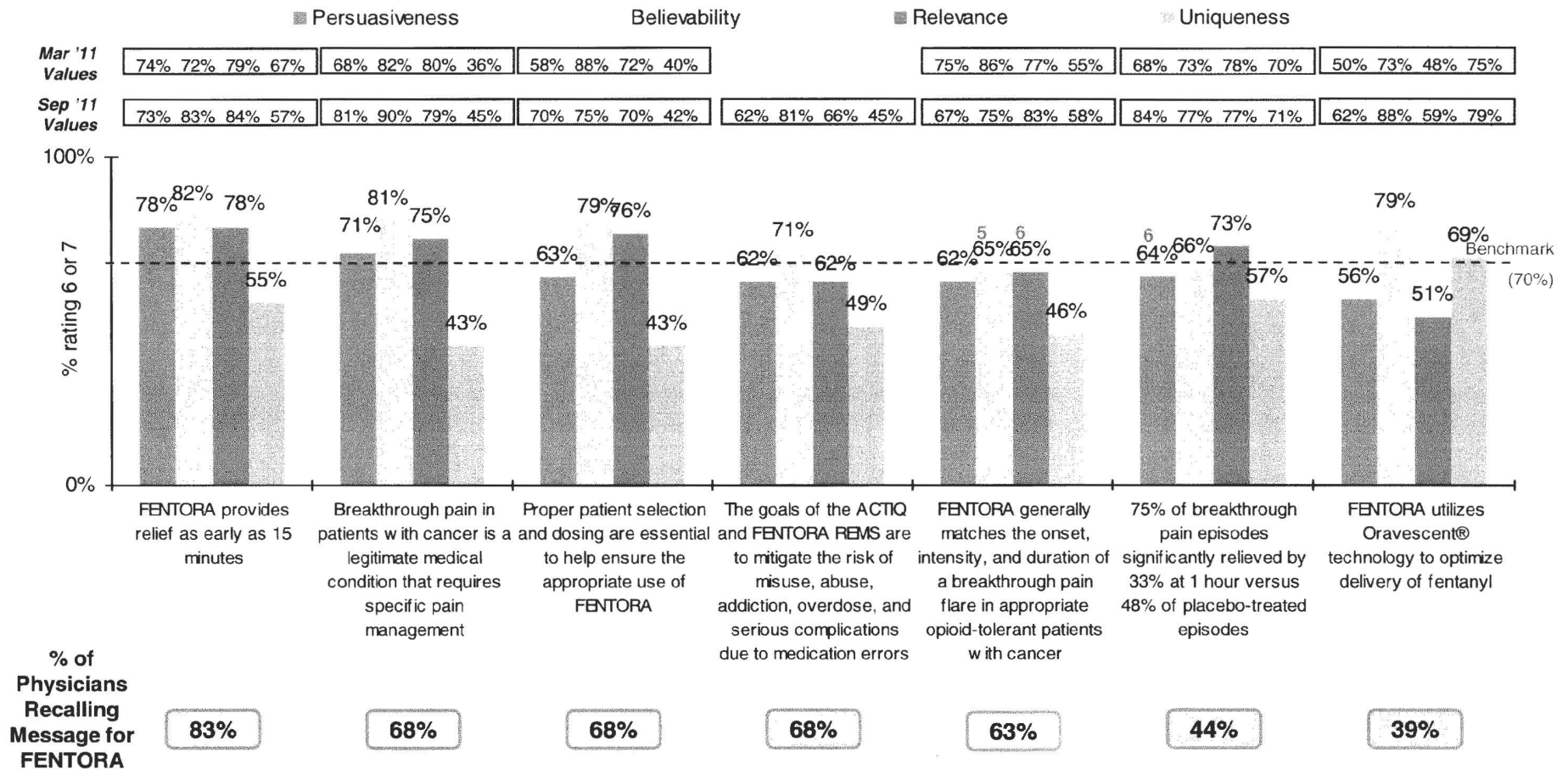
- Ensure FENTORA sales reps are highlighting the benefits of the Prescription Savings Program, including that it starts the prior authorization process, in discussions with physicians
 - Leverage the new savings program to continue to improve physician perceptions of FENTORA affordability to the patient
- Encourage reps to utilize the available resources to address the out-of-pocket cost barrier
- Further investigate any potential knowledge gaps related to REMS across key specialties of interest (i.e. PCPs) and ensure that FENTORA sales reps are providing necessary information to these physicians to drive enrollment



Additional Findings

Messages continue to be perceived as highly believable and relevant by physicians

FENTORA Message Diagnostics – Top 2 Box (Among MDs Recalling Message)

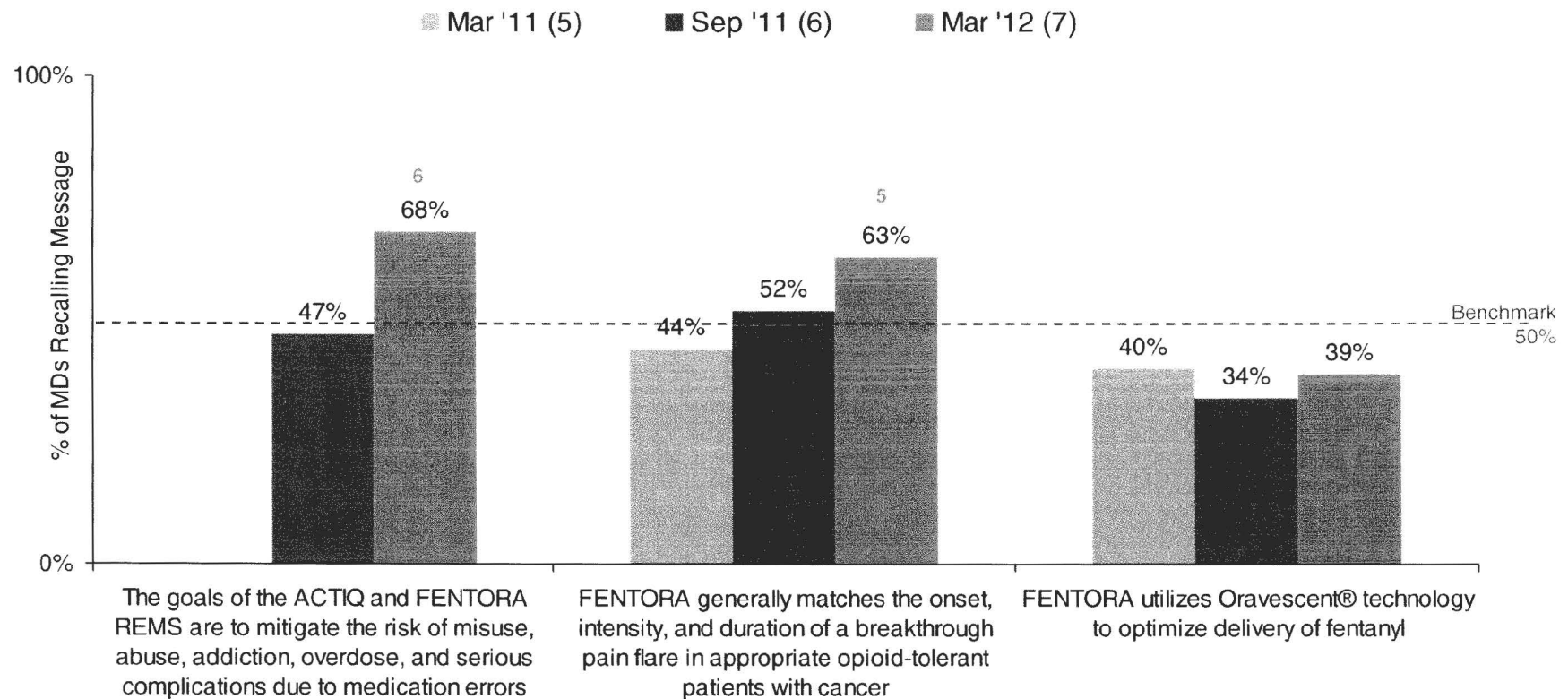


Significant difference ($p < 0.05$) across waves as 5=Mar'11, 6=Sep'11

D2-D5. On a scale of 1 to 7, where 1 is "not at all" and 7 is "very," how persuasive/relevant/unique/believable are each of the following messages? (n-size varies from 31-67 based on response to D1).

Recall of the REMS supporting message has significantly increased since last wave

Aided Recall of FENTORA Supporting Messages

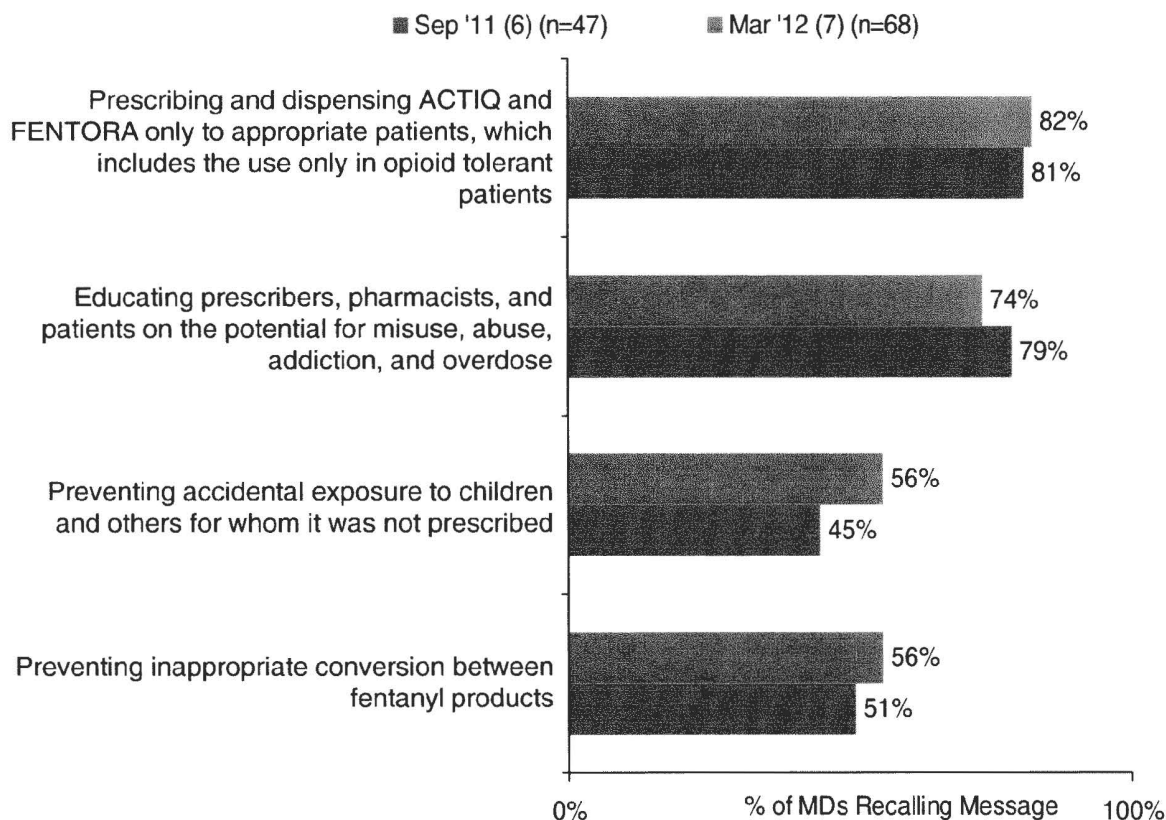


Significant difference across waves as 5=Mar'11, 6=Sep'11

D1b. Additionally, do you recall hearing any of the following messages about FENTORA from your most recent sales call with the FENTORA sales representative? Please select all that apply. (n=100)

Recall of REMS supporting messages remains similar to last wave

FENTORA REMS Message – Supporting Details (Among physicians who recall the REMS message)



No statistically significant results across waves.

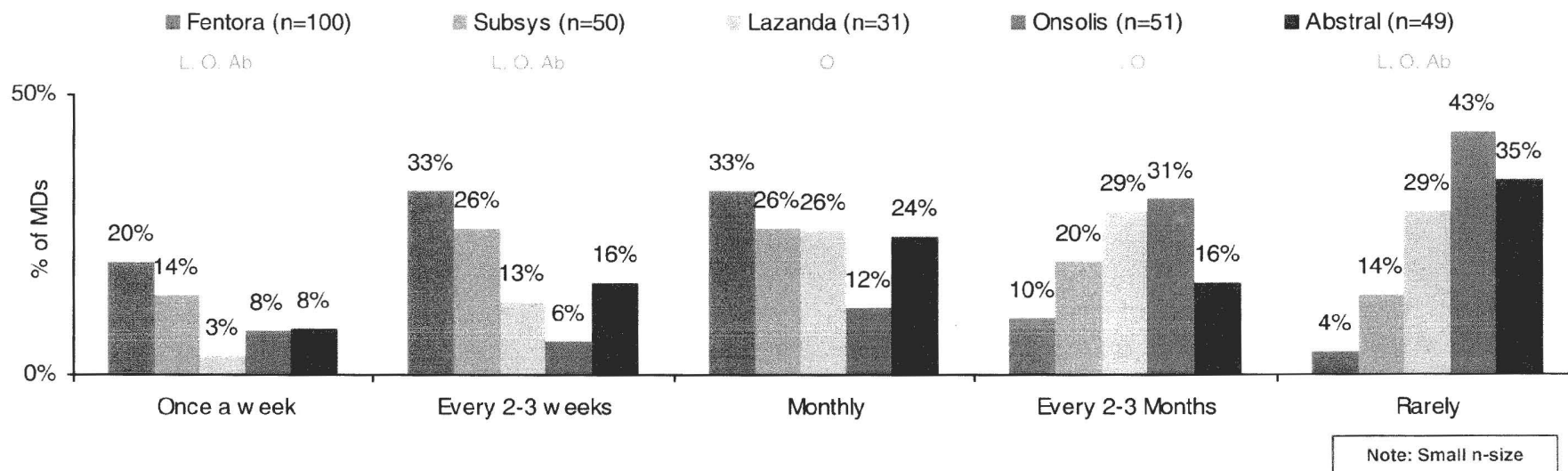
D11. Which of the following supporting details do you recall the FENTORA rep discussing in the context of presenting the goals of the ACTIQ and FENTORA REMS program?

35

Subsys sales reps call on physicians with a similar frequency as compared to FENTORA, however FENTORA details tend to be longer

Additional Findings

TIRF Product Detail Frequency



	FENTORA (n=100)	Subsys (n=40)	Lazanda (n=27)	Onsolis (n=24)	Abstral (n=28)
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Rep Relationship

Average Length of Detail (in min)	11.4 ^S	10.1	8.1	7.5	7.2
Length of Relationship (in months)	19.6	6.5	9.3	11.8	10.6
Quality of Interaction (mean rating)	5.4	5.3	4.7	4.7	4.8

A9. How frequently do you see sales representatives for the following products?

A10. For how long has the following product sales representative been calling on you?

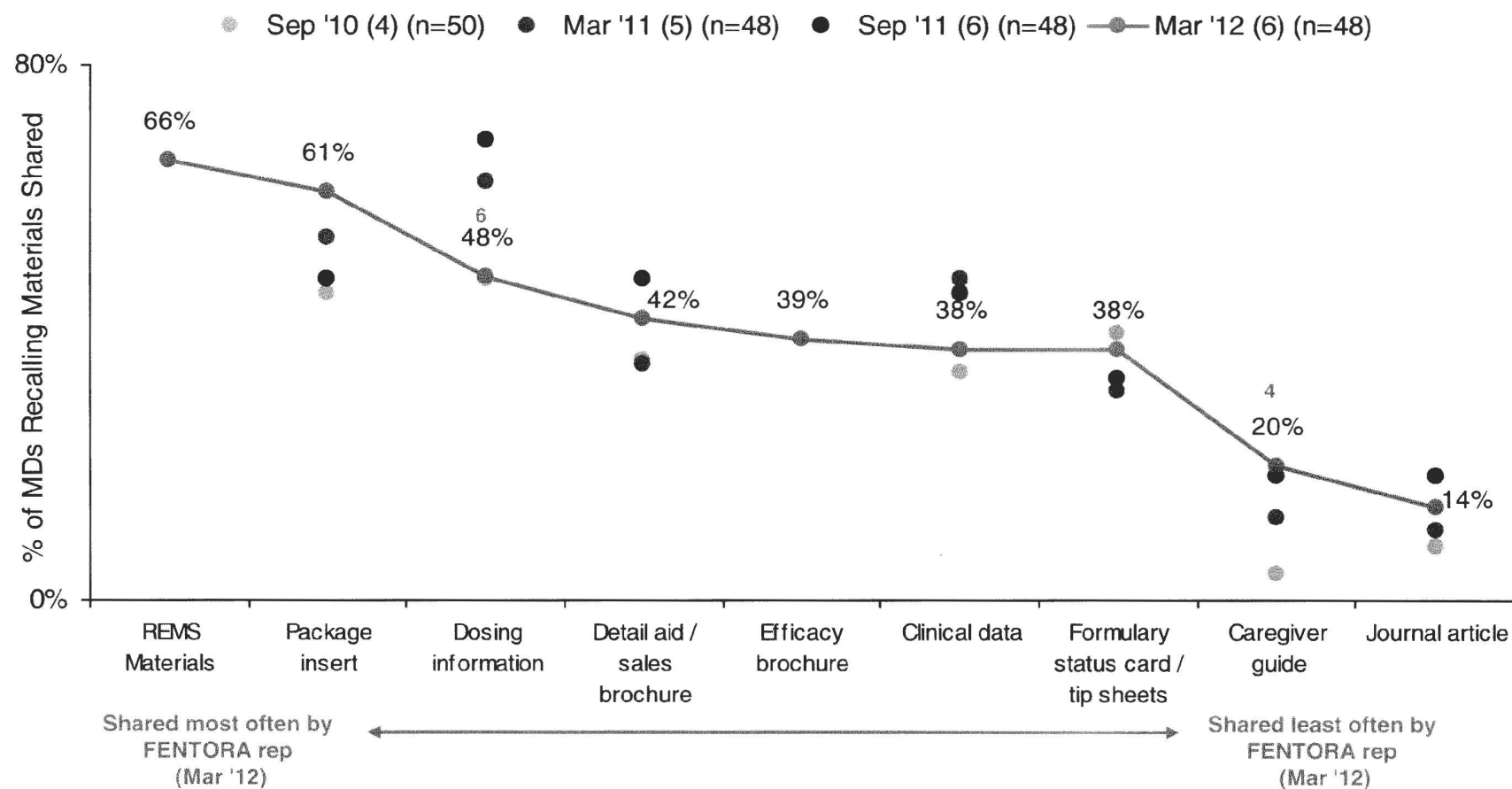
A11. Thinking about your most recent sales call for each of the following products, how much time did you spend discussing each of the following products with the sales representative?

A31. Thinking about your MOST RECENT sales call from each of the following product sales representatives, how would you rate the quality of the interaction?

36

FENTORA reps primarily share *REMS materials* and the *package insert*; use of the sales aid directionally decreased

% of MDs Recalling FENTORA Reps Sharing Product Materials



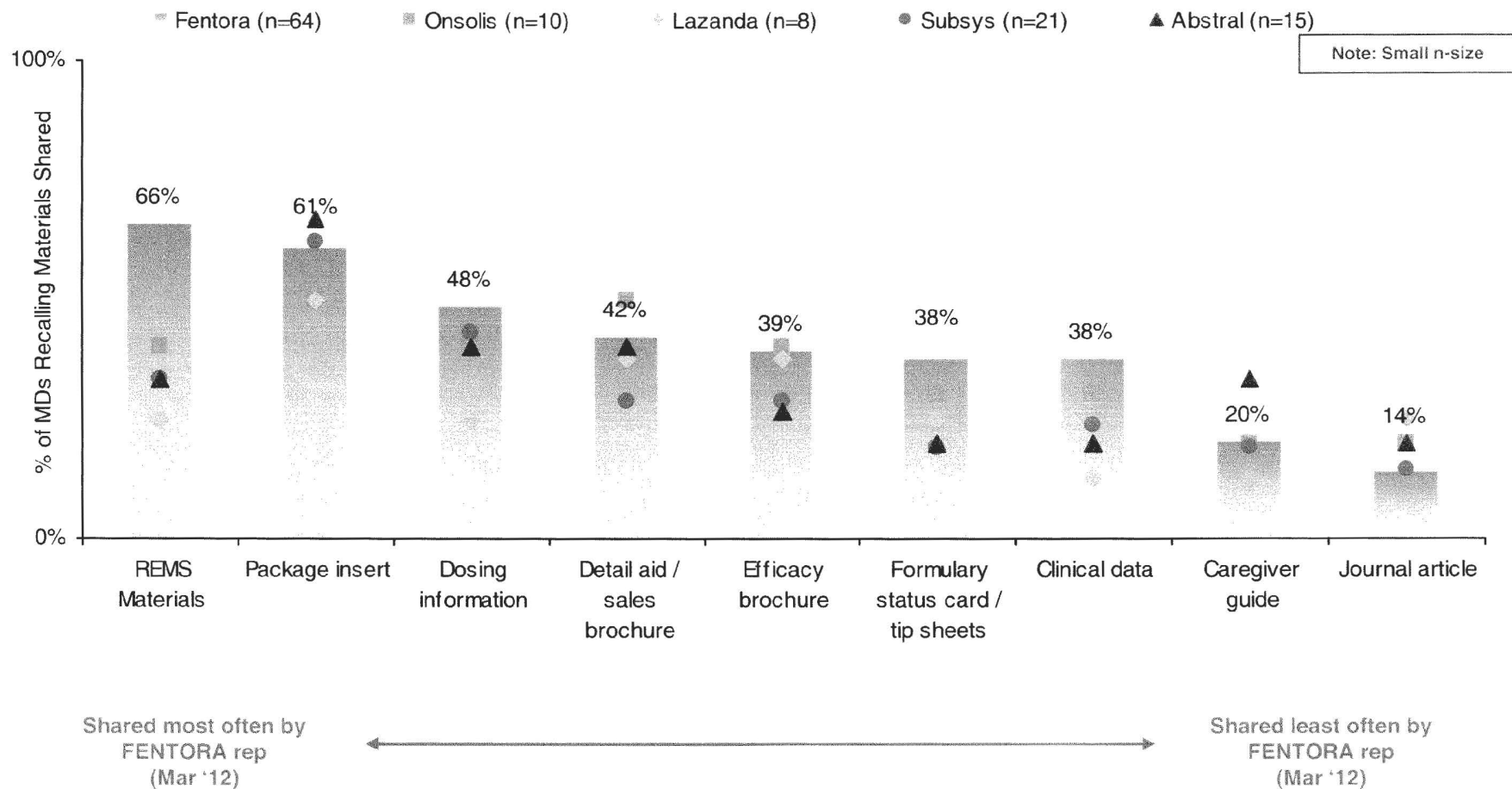
Significant difference ($p < 0.05$) across waves denoted as 4=Sep'10, 5=Mar'11, 6=Sep'11 respective to the current wave.

A13. You mentioned that during your most recent sales call for each of the following products, the sales representative shared product materials with you. Which, if any, of the following materials did the sales representative use to aid the sales call? You may select as many as apply.

FENTORA sales reps share *REMS materials* more often than the competition

Additional Findings

% of MDs Recalling Breakthrough Pain Reps Sharing Product Materials – Current Wave



Data label shown only for FENTORA. Statistical testing not conducted for n<30.

A13. You mentioned that during your most recent sales call for each of the following products, the sales representative shared product materials with you. Which, if any, of the following materials did the sales representative use to aid the sales call? You may select as many as apply.

38

Physicians remain divided over their perceptions of the TIRF REMS access program with only half of them having positive impressions about it

Overall Impression of the TIRF REMS Access Program (% of physicians, n=100)

Positive Perceptions



50%

- Positive Impressions (general) (26%)
- Helps/ protects patients (18%)
- One program covers all products (5%)
- Informative (4%)

"It will lower the risk of abuse, overuse, and diversion of these products"

"thankful that it is a sinlge program - instead of one for each drug"

Uncertain/ Mixed Perceptions

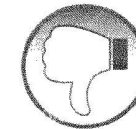


20%

- Don't Know (6%)
- Mixed Perceptions (5%)
- Others (5%)
- None (4%)

"good concept but creates more work. not sure it affects outcomes."

Negative Perceptions



30%

- Barrier / Inconvenient (26%)
- Useless (4%)
- Complicated (2%)

"needless time consuming paperwork. Long acting opioids much greater risks"

"a totally inconvenient and unnecessary addition to my practice as a pain specialist."

Awareness of the FENTORA reimbursement hotline increased significantly as compared to Q3'11

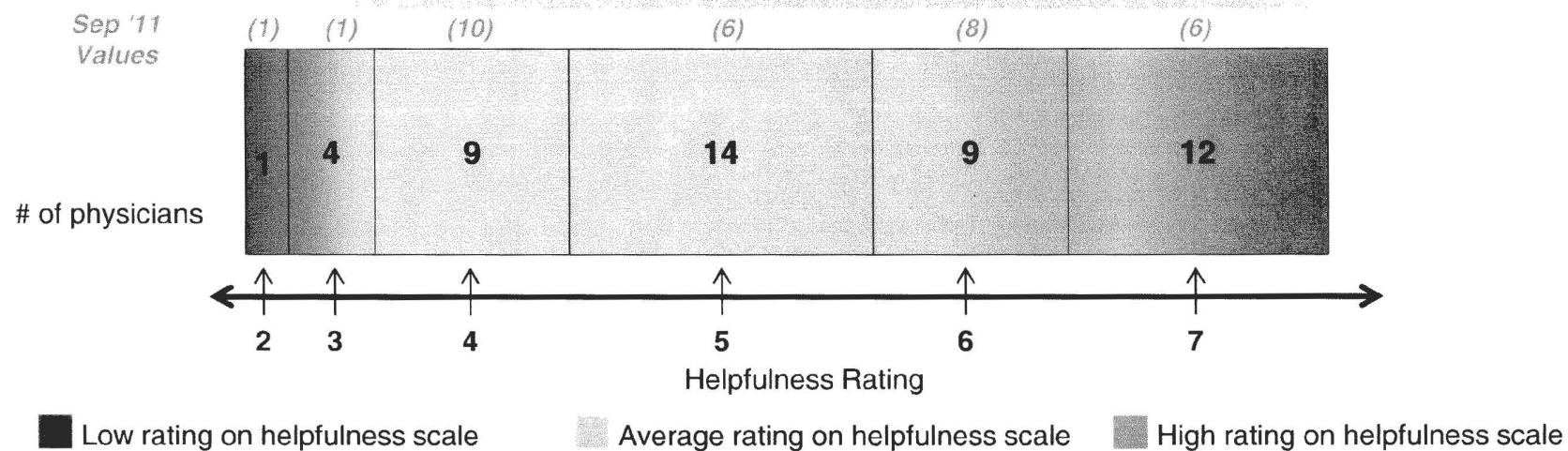
FENTORA Reimbursement Program

FENTORA Reimbursement Program

For questions about insurance coverage call toll-free

1-877-4FENTORA (1-877-433-6867)

49% of physicians are aware of the FENTORA reimbursement support hotline
(35% in Sep'11)

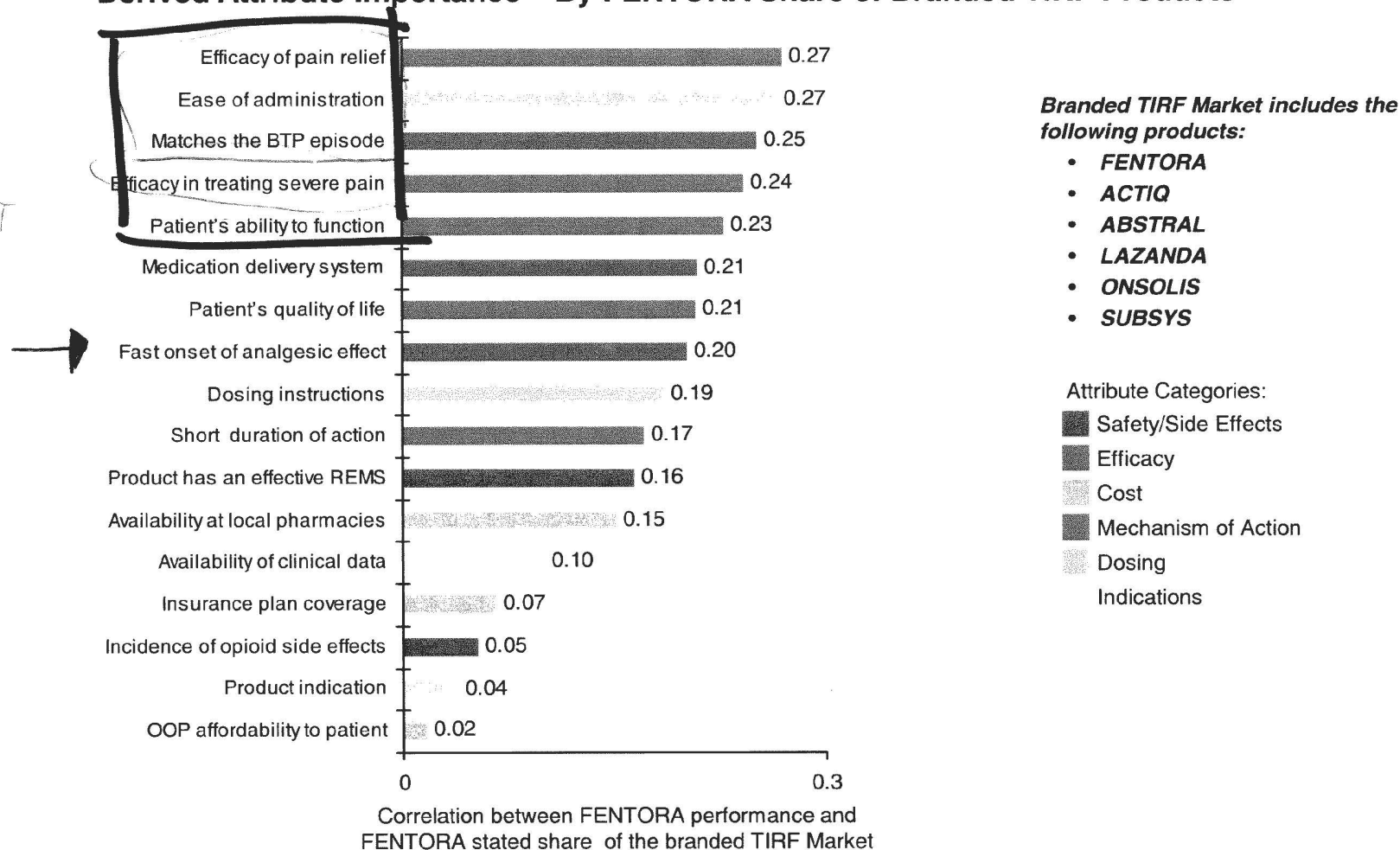


A32. Doctor, for each of the following products, are you aware of a reimbursement support hotline? (n=100) A33. Doctor, for each of the following products, how helpful is the reimbursement support helpline? Please use a scale of 1 to 7 where 1 is "Not At All Helpful" and 7 is "Extremely Helpful". (n=49) Source for image: www.fentora.com

40

Efficacy of pain relief and ease of administration are the top drivers of share

Derived Attribute Importance – By FENTORA Share of Branded TIRF Products



Derived Importance is based on FENTORA share of FENTORA prescribers in the last 6 months (Mar '11 – Aug '11) in the Rapid Onset Opioid Market (FENTORA, Actiq, Abstral) (n=49). E5. Please rate how satisfied you are with each product's performance on the following attribute when treating breakthrough pain. (N-varies between 39-96 based on product)

Source: TRx data (Mar'11 – Aug '11) provided by Cephalon Sales Operations Internal Data

41

— Got to Randy —

This study is designed to provide insights into the delivery of promotional messages and impact of activities for FENTORA

Message Recall Study Project Objectives

- **Monitor and assess the performance of FENTORA on key metrics**
 - Measure aided and unaided recall rates of FENTORA messages
 - Gauge message perceptions on relevance, believability, persuasiveness, and uniqueness components
 - Track sales call activities in support of FENTORA
 - Compare current and intended future prescribing in the Breakthrough Pain Market
 - Analyze physician perceptions of FENTORA across specific product attributes
- **Understand main drivers and diagnose the “why” behind performance by correlating sales force effectiveness measures with performance metrics**
 - Evaluate the impact of metrics on prescribing using secondary data analysis
 - Determine importance of product attributes and influence of physician behavior
- **Develop action-based recommendations for the FENTORA team**
 - Identify areas of growth opportunity among key performance drivers

Findings are based on 100 physicians recruited from TEVA's target universe during March and April 2012

Overview of Sample – Current Wave

Physician Specialty				
	Pain Management	PCPs	Other Key Specialties	Total
# of MDs	49	23	28	100

The Q1'12 sample includes 5 Oncologists

- **A 40-minute online study was fielded between March 28 2012 and April 27, 2012**
- **To qualify for the study, physicians had to:**
 - Be in practice (since residency) between 2 and 30 years
 - Personally see or treat a minimum of 100 patients in a typical month
 - Have taken the survey within two weeks of being detailed by a FENTORA sales representative
- **Secondary data provided by TEVA Sales Analysis and Planning used in this report include :**
 - TRx data (Mar '11 - Feb '12)
 - Call activity data (May '11 - Apr '12)
 - REMS Enrollment (Oct '11 - Apr '12)
 - Coupon / Voucher Drop data (May '11 - Apr '12)

"Pain Management" includes Pain MDs, Physiatrists and Anesthesiologists. "Other Key Specialties" (OKS) includes Neurologists, Oncologists, Rheumatologists and Nurse Practitioner

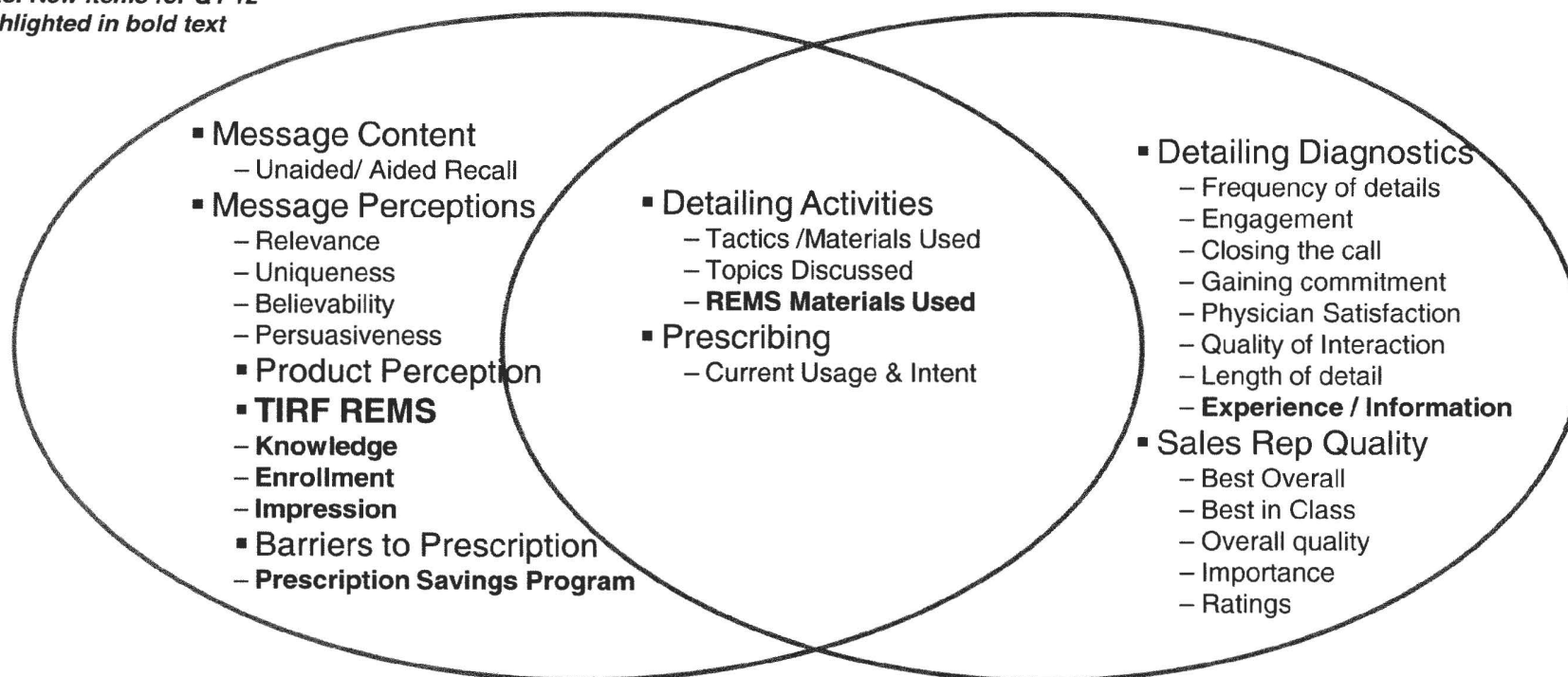
This study is designed to capture both message recall / brand issues and sales force effectiveness metrics

Study Design

Message Recall/Brand Report

SFE Report

*Note: New items for Q1'12
highlighted in bold text*



This presentation will focus on the Message Recall and Brand specific components

The FENTORA study assesses sales call activities, messages, intended prescribing and physician perceptions

FENTORA Study - 40 Minute On-line Survey

A

Detailing Activities

- I. Best Overall Rep and Best BTP Rep
- II. Frequency of details
- III. Length of relationship
- IV. Quality of Interaction
- V. Length of detail
- VI. Gaining Commitment
- VII. Physician Satisfaction
- VIII. Activities conducted during detail
- IX. Materials shared during detail
- X. REMS Knowledge and Enrollment
- XI. Speaker program attendance
- XII. FENTORA Prescription Savings Program

B

Unaided Messaging

- I. Main message discussed with rep
- II. Secondary messages discussed with rep
- III. Product topics discussed with rep
- IV. Level of engagement
- V. Quality of Experience / Information

C

Compliance Assessment

- I. Off-label discussion

D

Aided Messaging

- I. Messages recalled during detail
- II. Message perceptions

E

Product Perceptions

- I. Awareness of new products
- II. Attribute Importance
- III. Product Satisfaction

F

Product Usage

- I. Current prescribing
- II. Intended prescribing (next six months)
- III. Barriers to prescribing

G

Sales Representative Ratings

- I. Sales representative overall quality ratings
- II. Importance of rep characteristics
- III. Rep ratings for each characteristic

NOTE: Compliance (Section C) and Sales Rep Ratings (Section G) are not included in this report

Some Important Caveats

Context

- Respondents who participated in the FENTORA study were part of Teva's target lists
 - To qualify, respondents had to have participated in the study within two weeks of being detailed by their FENTORA rep
- Respondents were asked to rate their FENTORA rep and competitor reps in the chronic / breakthrough pain market

Benchmarks

- Satisfactory aided message recall rates are dependent on the number of messages for the brand
 - For brands with 1 - 4 messages, recall rates greater than **70%** are considered high
 - For brands with 5+ messages, recall rates greater than **50%** are considered high
- Messages are considered to be persuasive, unique, believable or relevant if more than **70%** of physicians rate the messages highly on the metrics
 - Physicians were asked to rate the messages on a 1 to 7 scale, where 7 means highly persuasive/unique/believable/relevant; top two box percentages (% of physicians rating 6 or 7) are shown throughout the deck

Statistical Testing

- Statistical significance was evaluated at a 95% confidence level
- Statistical significance was conducted when n-size was above 30
- Statistical testing was conducted for the following:
 - Across products → statistical testing conducted between FENTORA product and benchmark competitor products
 - Across waves → statistical testing conducted between Mar '12, Sep '11, Mar '11, and Sep'10