

AnswersOn...

Cancer diagnoses accounted for approximately 29.7M office visits to healthcare providers in the United States in 2018.

Cancer, also called malignancy, is characterized by the development of abnormal cells that divide uncontrollably and have the ability to spread throughout the body and destroy normal body tissue. There are more than **100 types of cancer**, including breast cancer, lung cancer, colon cancer, skin cancer, prostate cancer and lymphoma. According to the American Cancer Society, in 2019 alone, there will be an estimated **1,762,450 new cancer cases** and **606,880 cancer deaths**.

In 2018, **oncologists** reported the following regarding office visits with their cancer patient population:



MALIGNANT NEOPLASM IS PREVALENT

Patients with a malignant neoplasm represented **6.7M** office visits in the 12-month period



BREAST CANCER IS THE HIGHEST REPORTED TYPE

1.5M or **23.2%** of visits had an associated breast cancer diagnosis, which is their highest reported cancer type



TYPICALLY TREATED WITH A PRESCRIPTION

70.9% of visits resulted in a drug being prescribed



ARE SEEN BY A SPECIALIST OFTEN

On average, cancer patients were seen by the specialist **7.9 times a year**

BIOPHARMACEUTICAL COMPANIES

IN THE ONCOLOGY MARKET

In 2018, biopharmaceutical companies...

SPENT APPROXIMATELY **\$1.4 BILLION**

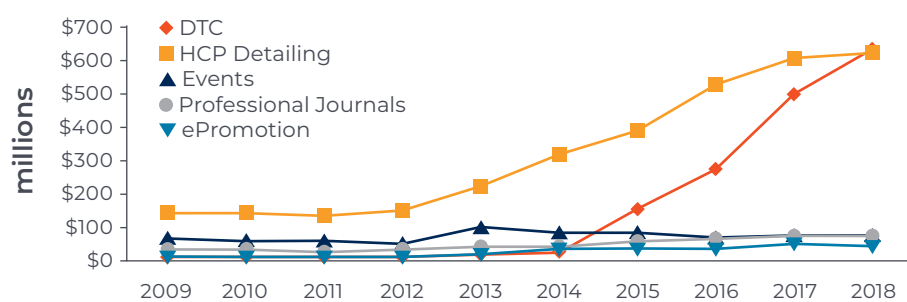
on the promotion of over 300 brands and awareness campaigns. Promotion included HCP detailing, professional events, journal advertising, e-promotion and DTC.

The Biopharmaceutical industry has shifted focus in recent years, with more resources allocated

TOWARD THE CONSUMER WITH DTC ADVERTISING.

Note: Cancer diagnosis was defined as ICD-10 C00-C97.

Oncology Market Promotional Spend 10-Year Trend

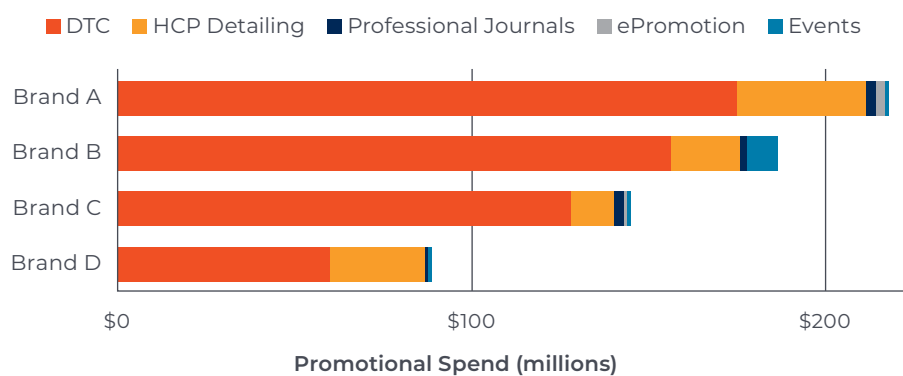


Source: Syneos Health Promotional AnswerSuite™/Kantar Media

The top four cancer drugs accounted for **45%** of the oncology market's promotional spend in 2018.

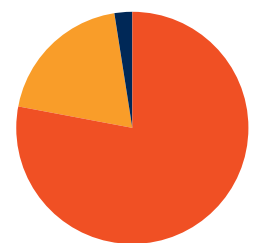
DTC spend has been on a consistent upward trend since 2015, as a result of numerous new product launches and focus on consumer marketing.

Top 4 Spending Brands



Source: Syneos Health Promotional AnswerSuite™/Kantar Media

Brand A DTC Mix (\$)



TV: **77.9%**
Magazines: **19.7%**
Internet: **2.4%**

Source: Syneos Health ConsumerAnswers™/Kantar Media

Syneos Health AnswerSuite™

Syneos Health Syndicated Market Research & Insights utilizes a physician panel of more than 10,000 healthcare providers and close to 30 years of ongoing data collection. The AnswerSuite from Syneos Health offers one of the most robust medical and promotional audits in the industry.

TreatmentAnswers is a monthly survey of 3,200 physicians, across 30 specialties, monitoring patient diagnoses and physician-intended drug and non-drug therapy. This audit offers unique insight into physician and NP/PA diagnosis visits, prescribing habits and associated physician and patient demographic metrics.

PromotionalAnswers is a comprehensive syndicated data resource covering personal (detailing, events, ePromotion and sampling) and non-personal (HCP journal and consumer DTC) promotion activities across the pharmaceutical industry. Personal promotion is based on monthly surveys with healthcare providers, across 32 specialties, while non-personal promotion is provided through a partnership with Kantar Media. This relationship also powers the Ad Browser from Syneos Health, a full library of print and video ads.



To learn more about our Syndicated Market Research & Insights services, please contact Angelica Girone at angelica.girone@syneoshealth.com.