



*How do other pharmaceutical companies do "it"?®*

**2009 Confidence Indices**  
**The Annual State of Commercial Operations**

**December 2008**

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# Methodology



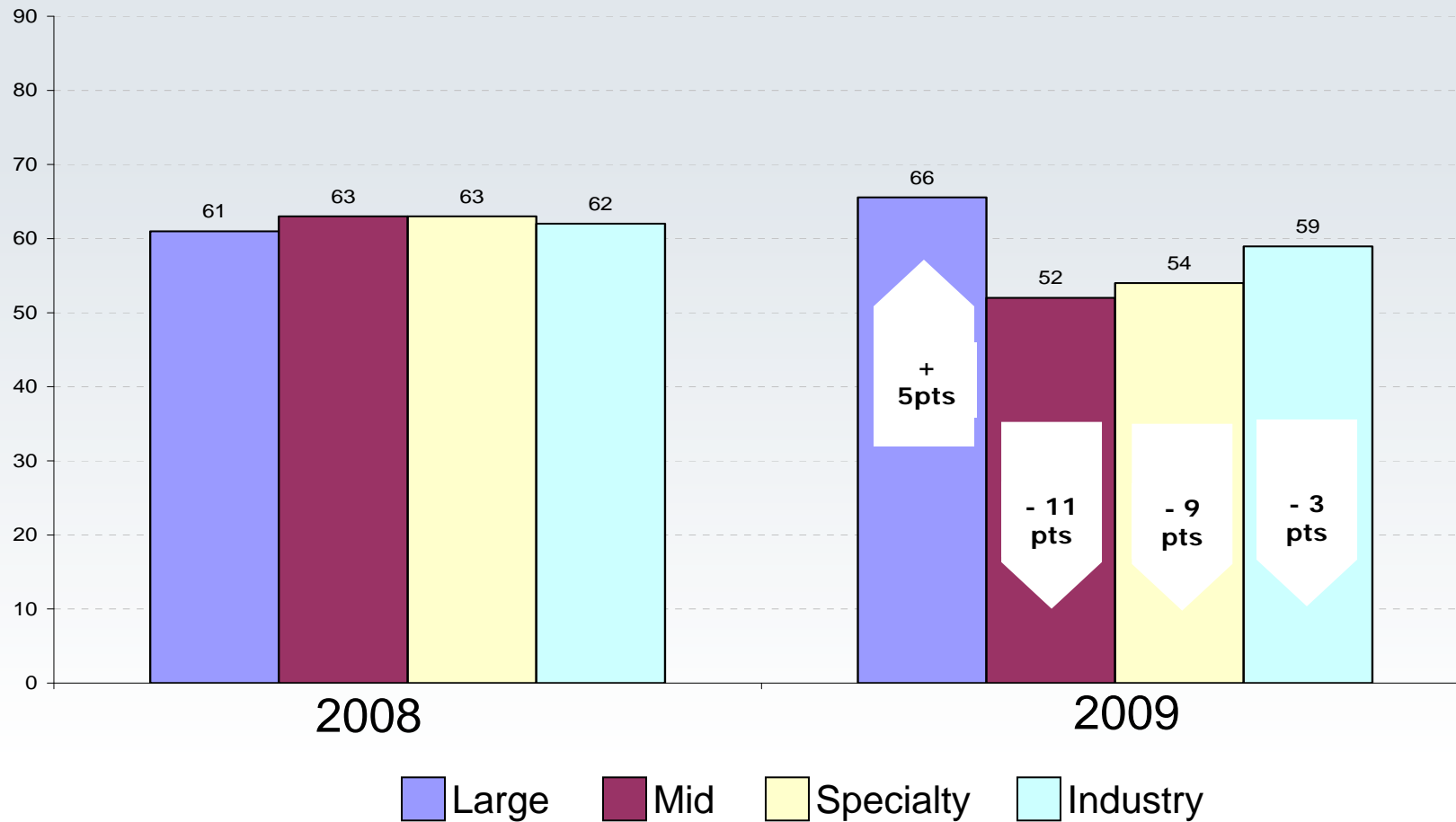
- TGaS Advisors performed a benchmark with 20 Industry Executives in December 2008 and compared it to a similar benchmark from December 2007
- TASCOPs is a qualitative and quantitative benchmark (45 questions) pertaining to the impressions of Industry Executives about the future
  - The Confidence Indices here-in are 2 of those benchmarks
- The results of the benchmark are analyzed in four general categories (overall Industry and 3 segments)
  - Large-tier (Companies with > 3,000 sales people)
  - Mid-tier (Companies with 500 – 3,000 sales people)
  - Specialty (Companies operating in highly specialized markets)
- All data is confidential and non-company identified

## TGaS Advisors Benchmarks – Industry Indices

- Industry Confidence Index (ICI)
  - The ICI is a benchmark of Industry Executives confidence in the future of the Industry
- Company Confidence Index (CCI)
  - The CCI is a benchmark of Industry Executives confidence in the future of their Company

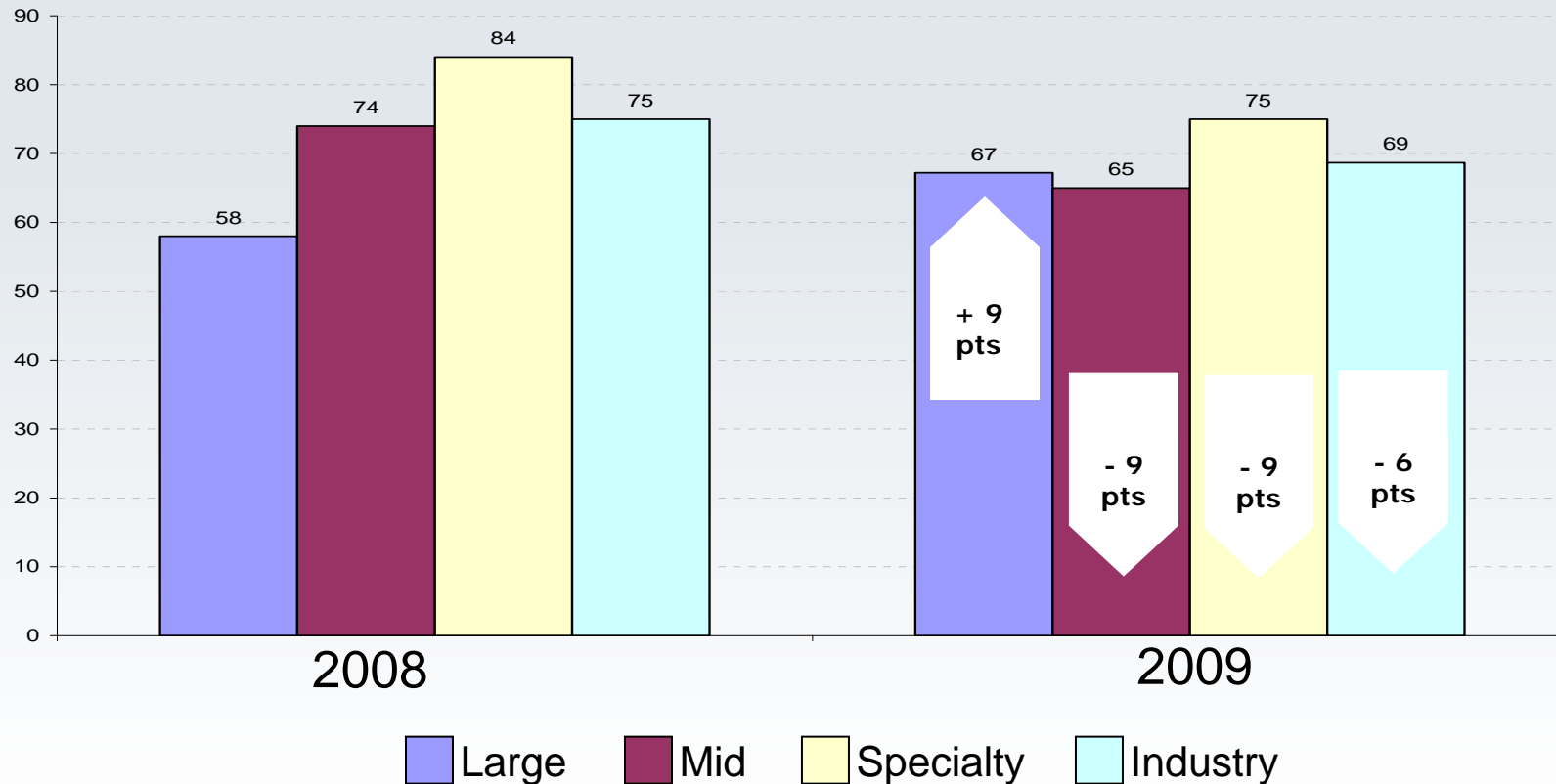
(\*) 100 point scale (0 = extremely pessimistic to 100 = extremely optimistic)

# Industry Confidence Index (ICI)



**Overall, industry confidence is down from last year, but it is up within just large-tier**

# Company Confidence Index (CCI)



**Overall, company confidence is also down from last year, but it is up within just large-tier**

# Industry Confidence Index

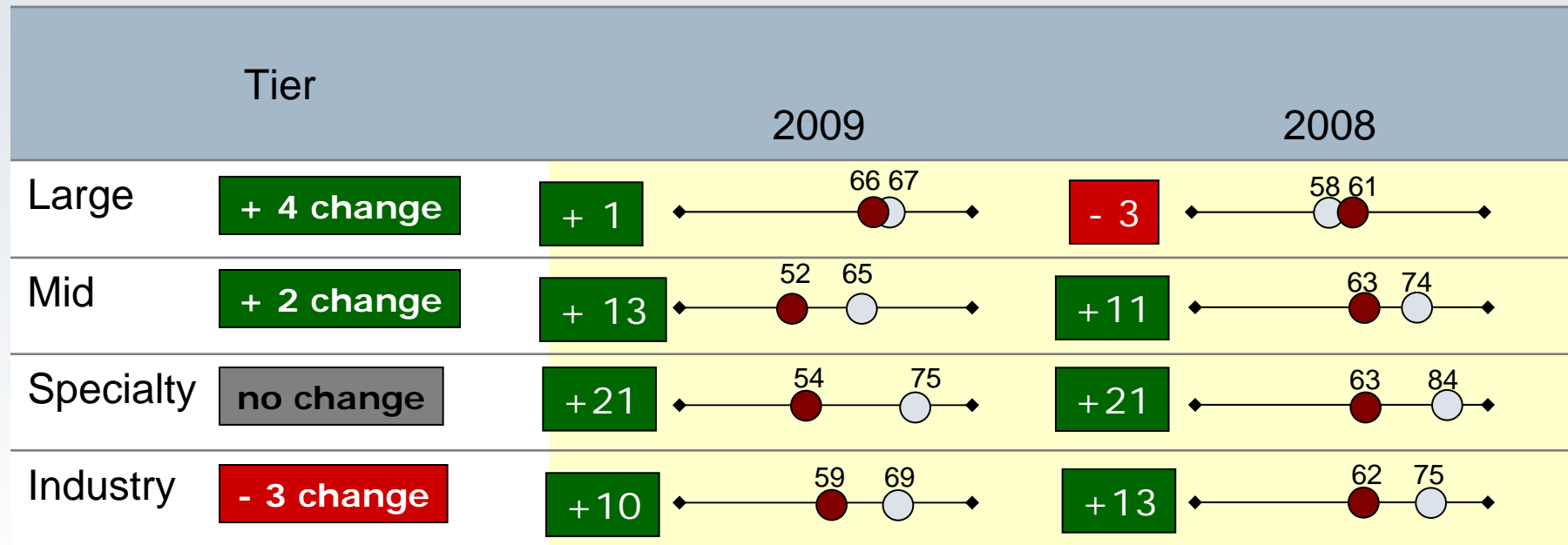


	Tiers	Average Rating
		 0 Pessimistic 50 100 Optimistic
What are your feelings about the future of the <b>entire Pharmaceutical Industry</b> given a 3 year time horizon?	Large Mid Specialty	 Large 66 Mid 52 Specialty 54
What are your feelings about the future of <b>your Company</b> given a 3 year time horizon?	Large Mid Specialty	 Large 67 Mid 65 Specialty 75
0 = Do not Join    100 = Do Join		 0 Do not Join 50 100 Do Join
If you were advising people who were looking to join the pharmaceutical industry, how <b>strongly</b> would you <u>advise them to join</u> ?	Large Mid Specialty	 Large 74 Mid 60 Specialty 78

# Industry Confidence Index – 2008 to 2009



What are your feelings about the future of the Industry (●) and your Company (○) given a 3 year time horizon?



● Industry

○ My Company

Pessimistic

Optimistic

0

100

# Summary



- Overall Industry Confidence Index (ICI) is down from last year (-3 points), while large-tier Pharma is actually up (+ 5 points)  
**Headline: Has Big Pharma confidence turned the corner after the last few 'tough' years?**
- Overall Company Confidence Index (CCI) is down from last year (-6 points), while large-tier Pharma is actually up (+9 points)  
**Headline: While optimism in Specialty Pharma Companies remains higher than Industry average, it is down (-9 points) from last year.**