

Oncologists' Digital Engagement in the HR+/HER2- Breast Cancer Space in 2023

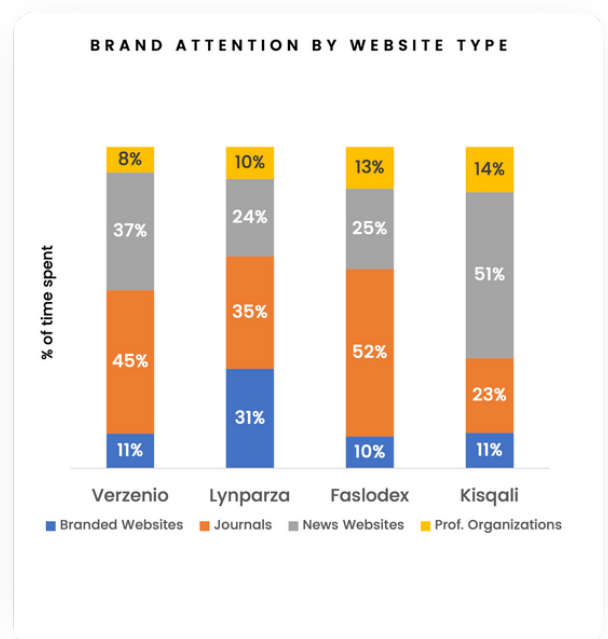
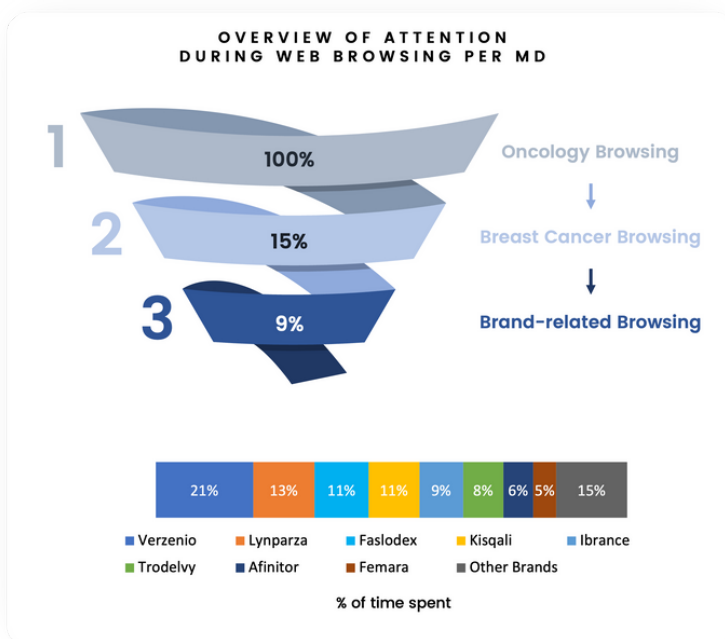
Oncologists encountered an average of 177 different brands of drugs while engaging with content on healthcare websites and display ads across various online platforms in 2023. This significant volume highlights a saturated market, emphasizing the critical need for brands to stand out strategically.

In this paper, we analyzed data from 170 oncologists over the entire year, from January '23 to December '23 to understand -

1. How brands in the HR+/HER2- Breast Cancer (BC) space attracted online attention
2. How these brands fared against each other across key digital channels, and
3. The differences in strategies and messaging they used in their digital campaigns

The data used in this study is gathered through Perxcept, an omnichannel tracking tool by ZoomRx that observes the online activity of healthcare professionals (HCPs). The study examined HCP online behavior, their exposure, and interactions with certain key channels - product websites, display ads, and emails during these twelve months. Twelve brands from the HR+/HER2- BC space were included in the study - Lynparza, Afinitor, Ibrance, Kisqali, Piqray, Trodelvy, Verzenio, Talzena, Femara, Arimidex, Aromasin and Faslodex.

BRAND ATTENTION WHILE BROWSING



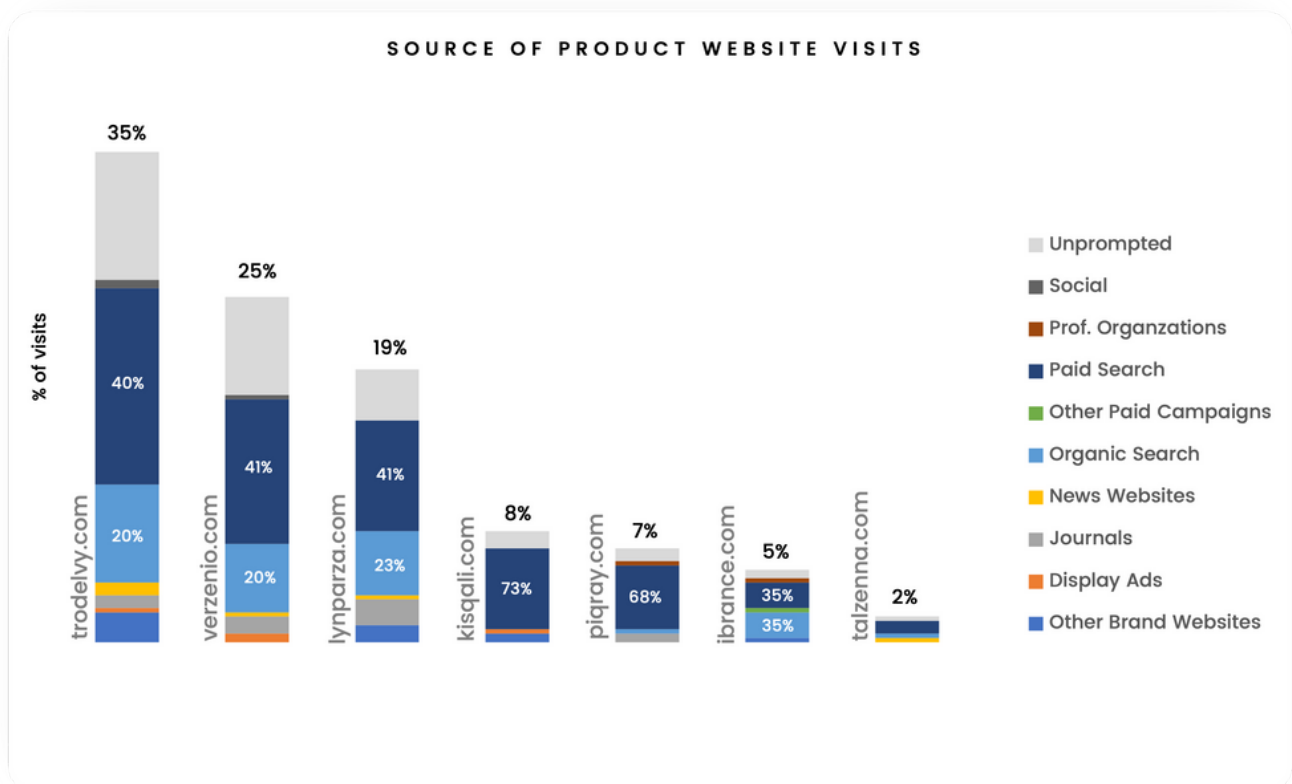
Of the time spent browsing healthcare-relevant content, oncologists spent 15% of the time exploring content related to breast cancer, the most extensively read-about therapy area. This was followed by lung cancer and prostate cancer content which each claimed 12% and 10% of their browsing time, respectively. Brands targeting HR+/HER2- breast cancer comprised 43% of all breast cancer brand-related browsing. This aligns with the prevalence of HR+/HER2- breast cancer among breast cancer subtypes, as it stands as the most common type, accounting for nearly 70% of all new breast cancer cases each year. TNBC-related and HER2+ BC-related content accounted for 25% of browsing time each, while the remaining 7% stemmed from drugs approved for ER+ BC and other chemotherapy drugs.

Oncologists spent the most time online reading about Verzenio (21% of attention), followed by Lynparza (13%), Faslodex (11%), and Kisqali (11%).

38% of the time spent browsing Verzenio occurred on news websites, driven by its approval for node-positive high-risk early breast cancer in March of this year. Kisqali secured its presence in the news through the release of data from the stage 3 NATALEE trial for adjuvant treatment in patients with HR+/HER2- early breast cancer. 50% of Kisqali's total engagement time originated from new websites, with 70% of this concentrated during May and June, coinciding with the ASCO 2023 timeframe.

Oncologists read about Lynparza and Faslodex primarily through online medical journals like uptodate.com and nccn.org for treatment protocols and information about effectiveness.

PRODUCT WEBSITE VISITS

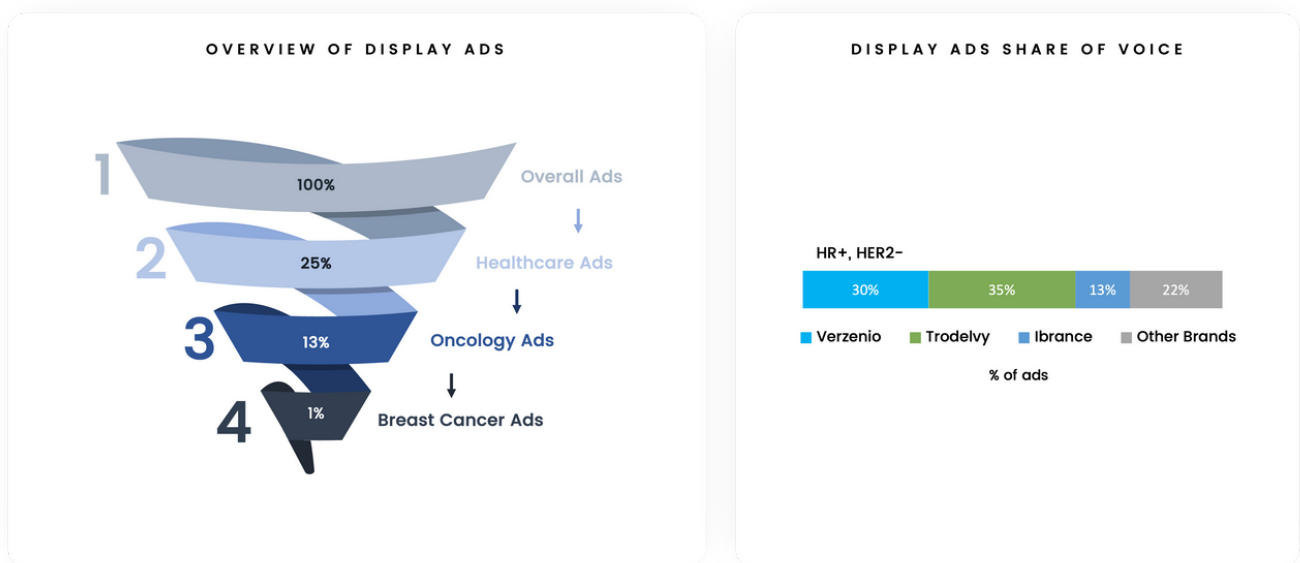


Oncologists visited trodelvy.com the most across all breast cancer types by oncologists. The top three brands in this regard – trodelvy.com, lynparza.com, and verzenio.com comprised 79% of all visits in the market. Each of the top three brands that had the most visits garnered a considerable share of visits from both paid search ads and organic search results. All three brands had around 40% of their visits directed from paid search. All three brands also had 20% of their visits from a click on organic search results. This underscores the importance of a well-structured SEO strategy in driving traffic.

More than 80% of the sessions involved visits to the home page of these three websites, and within this group, 33% also explored other sections of the website, with the efficacy section being the most popular choice.

A mere 1% of visits within the entire HR+/HER2- space resulted from clicking on a display. This suggests that display advertising has a limited impact or reach in attracting engagement within this specific context. Other sources like paid search were more influential in driving visits or interactions.

DISPLAY ADS



Of the ads that oncologists were exposed to, only 4% were centered around breast cancer, with 90% of the BC-related ads featured a brand. BC was the top therapy area followed by Multiple Myeloma (3%) and Non-Small Cell Lung Cancer (3%).

In the HR+/HER2- market, Trodelvy led the pack with a 35% share, followed by Verzenio at 30%, Kisqali at 13% and Ibrance at 10%. Trodelvy adopted a diverse advertising approach, appearing on over ten healthcare websites and a lot more non-healthcare websites, ensuring widespread reach and share. Interestingly, ~50% of Verzenio's ads were encountered on onclive.com. Oncologists however encountered 85% of Ibrance ads on asco.org, with the remaining 15% on breastcancer.org and healio.com.

TRODELVY[®]
sacituzumab govitecan-hziy
180 mg for injection

NOW APPROVED...

See full [Prescribing Information](#), including **BOXED WARNING**.

TRODELVY[®]
sacituzumab govitecan-hziy
180 mg for injection

TRODELVY[®] is now FDA approved in pretreated HR+/HER2- mBC¹

HER2=human epidermal growth factor receptor 2-negative; HR+=hormone receptor-positive; mBC=metastatic breast cancer

See full [Prescribing Information](#), including **BOXED WARNING**.

IMPORTANT SAFETY INFORMATION
BOXED WARNING: NEUTROPENIA AND DIARRHEA

- Severe or life-threatening neutropenia may

Over the past year, **MORE THAN 1,000 DOCTORS HAVE DONE MORE FOR THEIR PATIENTS** with HR+, HER2-, high-risk* early breast cancer by prescribing Verzenio + endocrine therapy**

*High risk was defined as patients who had 4+ positive nodes or 1-3 positive nodes and tumors that were ≥5 cm or Grade 3 and a Ki-67 score ≥20%.^{1,†}

†OVIA prescription data as of May 2022; HCP count (n=1,016).[‡]

[SEE THE DATA](#)

Full Prescribing Information

Important Safety Information
Severe diarrhea associated with dehydration and infection occurred in patients treated with

Verzenio[®]
abemaciclib
50/100/150mg tablets

Have questions about Verzenio?
Verzenio Continuous Care™ is here for you.

*Verzenio Continuous Care is not made up of medical professionals. Your doctor is your source for medical advice.

[GET SUPPORT NOW](#)

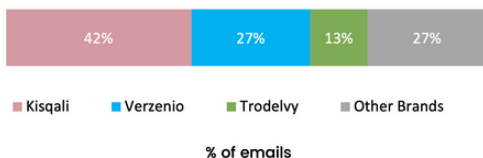
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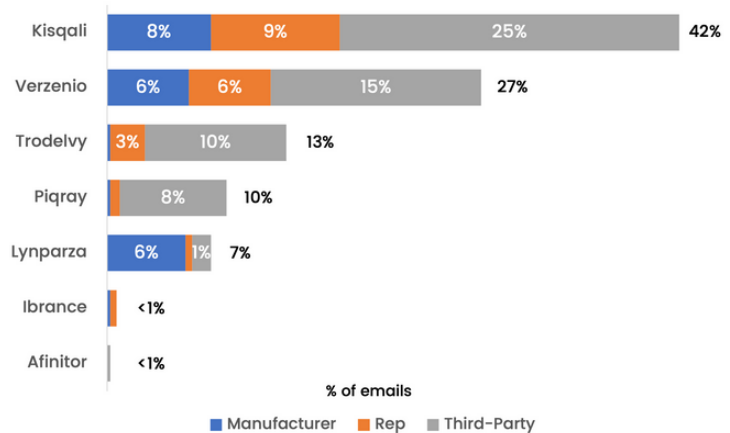
Verzenio's display ads highlighted efficacy in patient treatment, its recent phase 3 data release, and HCP support through its 'Verzenio Continuous Care' program. Trodelvy's ads focused on its approval for pretreated HR+/HER2- metastatic breast cancer, with some being indication-agnostic, urging exploration of its approval for various indications.

EMAILS

SHARE OF EMAILS



SHARE OF EMAILS BY SENDER



Within the spectrum of healthcare-related emails received by oncologists, 9% of these emails spoke about BC, and 72% of these were identified as branded sponsored emails used as promotional material to convey information. As a benchmark, 10% of the emails pertained to NSCLC, with 65% of them being branded sponsored emails.

Breast cancer emails targeting the HR+/HER2- market comprised 42% of all branded emails. Kisqali led with 42%, followed by Verzenio (27%), and Trodelvy (13%). Kisqali and Verzenio employed a balanced approach, using both direct and third-party sources to enhance reach and credibility, averaging 42% direct communication. In contrast, other brands either relied solely on third-party sources or exclusively sent direct emails. Emails sent by ClinAlert and WebMD had the highest reach among oncologists in the study.

BREAKING NEWS

NCCN CATEGORY 1 UPDATE National Comprehensive Cancer Network® (NCCN®) now differentiates ribociclib (KISQALI) as the only Category 1 Preferred first-line treatment option in combination with an AI for patients with HR+/HER2- mBC.¹

On January 27, 2023, the NCCN revised its guidelines—now ribociclib (KISQALI) is the only CDK4/6 inhibitor in combination with an AI designated as a Category 1 Preferred regimen in first-line HR+/HER2- mBC.^{1,2}

See the data that set KISQALI apart ▶

KISQALI—the first and only CDK4/6 inhibitor to demonstrate superiority vs chemotherapy in 1L patients with HR+/HER2- mBC who have aggressive disease

Access the digital brochure ▶

VERZENIO has the broadest coverage of ANY CDK 4/6

WITH COVERAGE FOR **95%** OF COMMERCIALLY INSURED PATIENTS^{2+†}

5% of patients taking Verzenio + ET discontinued treatment due to diarrhea. Among patients with diarrhea, 23% required a dose interruption and 21% required a dose reduction.^{1,3}

ALTHOUGH SOME CASES MAY BE SEVERE, THE MAJORITY OF CASES WERE EARLY AND TRANSIENT*

8 days median onset of most diarrhea cases²

5-6 days median time to resolution of Grades 2 and 3 diarrhea*

Verzenio's emails highlighted side effect management and resources for patients and HCPs, emphasizing coverage for 95% of commercially insured patients. Like Verzenio's ads, their emails also highlighted the 'Verzenio Continuous Care' Program for HCPs. Kisqali's emails focused on NCCN Category 1 updates, positioning it as the preferred first-line treatment for HR+/HER2- metastatic breast cancer. Additionally, Kisqali emphasized its recent phase 3 trial data, its status as the first CDK46 inhibitor superior to chemotherapy, and the availability of patient support resources. Like the messaging on its ads, Trodelvy's emails focused on its recent approval for pretreated HR+/HER2- metastatic breast cancer.

CONCLUSION

Effective strategies in each channel need to be employed by brands to stand out. Brands need to target HCPs through display ads on diverse websites to ensure extensive reach, with a focus on platforms with lower competition. They'll have to adopt a balanced approach, using trusted third-party senders for emails, enhancing credibility, and leveraging paid search to optimize engagement with product websites. This multi-faceted strategy positions these pharmaceutical brands for sustained success in the evolving HR+/HER2- breast cancer market.

With many pivotal events expected in 2024, including the impending entry of Keytruda and the anticipated NATALEE trial results from Novartis, it could lead to promising opportunities. Keytruda's third-phase trial indicates potential market expansion, while the NATALEE trial outcomes may influence strategies for brands in this space next year.