A WHITEPAPER ON

Comparing Point-Of-Care Share-Of-Voice with Marketing Share of Voice

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Pull vs Push: Quantifying the Impact of Marketing Campaigns on Treatment Conversations

Pharmaceutical marketing is resource-heavy and it has been notoriously difficult to measure the effectiveness of various initiatives.
New prescriptions are the ultimate measure of success but the preceding steps, the clinical discussions between patients and doctors leading to treatment decisions, are often a mystery behind closed doors.

Thanks to unique proprietary datasets, ZoomRx has visibility into both the in-office treatment discussions and exposure to promotional activity on digital channels and TV to evaluate their impact.

This presents a unique opportunity to answer the ultimate question of how marketing campaigns influence treatment decisions.

By aligning these datasets, we can directly compare the share of voice across marketing channels against the resulting Point-of-Care Share-of-Voice (PoC SOV), to understand their impact on which products are being discussed during patient appointments.

Approach

This white paper leverages proprietary ZoomRx data sources to run a pilot across immune/inflammatory indications:

ZoomRx's HCP-Pt Conversation Research provides an unbiased look into what's being discussed by gathering and analyzing audio recordings of key clinical appointments throughout the patient journey. We derive the Point-of-Care Share-of-Voice (PoC SOV) based on the relative frequency of product mentions during these in-office treatment discussions between HCPs and patients.

Perxcept tracks activity across web-based marketing channels through a variety of methodologies to capture marketing emails, display ads, and relevant web traffic. Data is cookie-independent and obtained directly by tracking HCPs and patients who volunteer to participate.

ZoomRx TV gives a share-of-screen-time look into various TV and streaming channels, allowing us to integrate off-line media consumption for specific demographics.

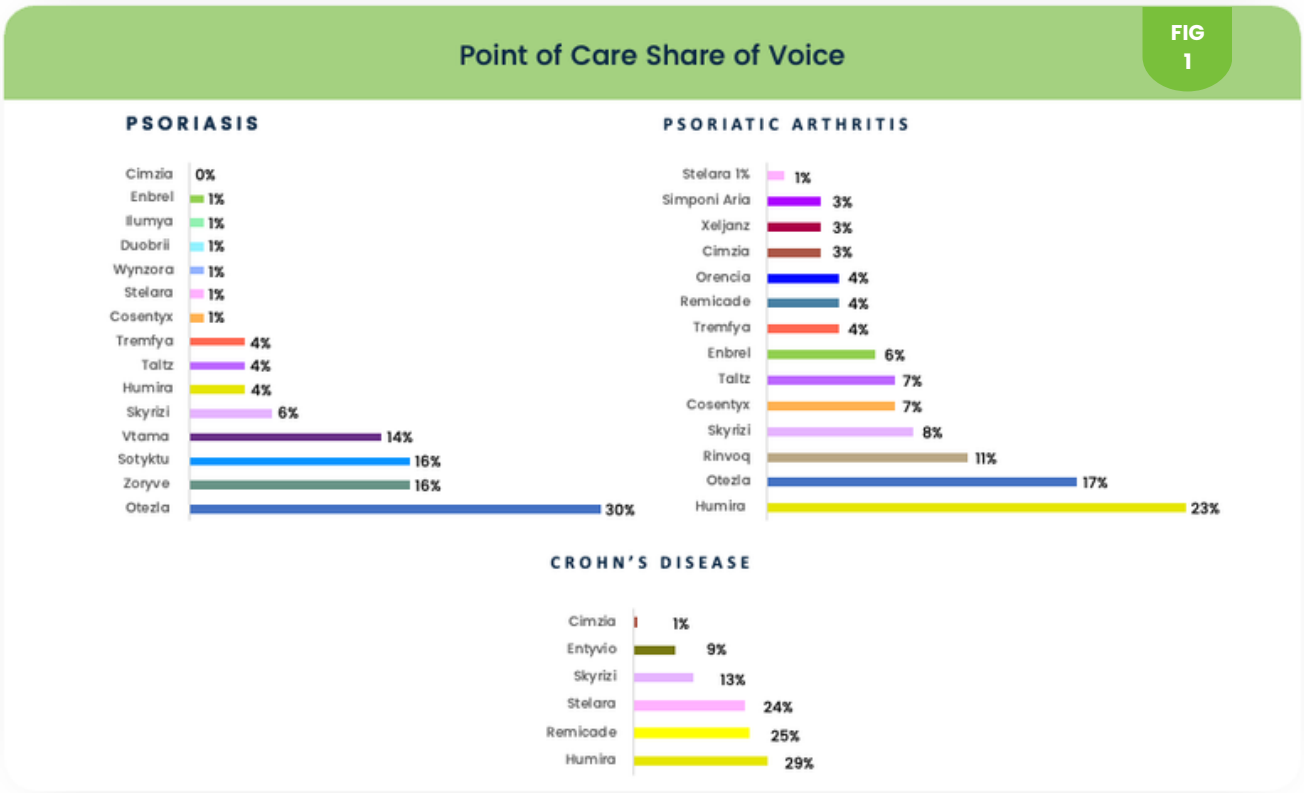
These data sources have been aligned to look at Psoriasis, Psoriatic Arthritis, and Crohn's Disease. These all have relatively large patient populations and a high volume of marketing activity to pull from.

Combining our data sources in these indications generates an omnichannel view of the brand exposure to doctors and the resulting share of their clinical discussions.

Results

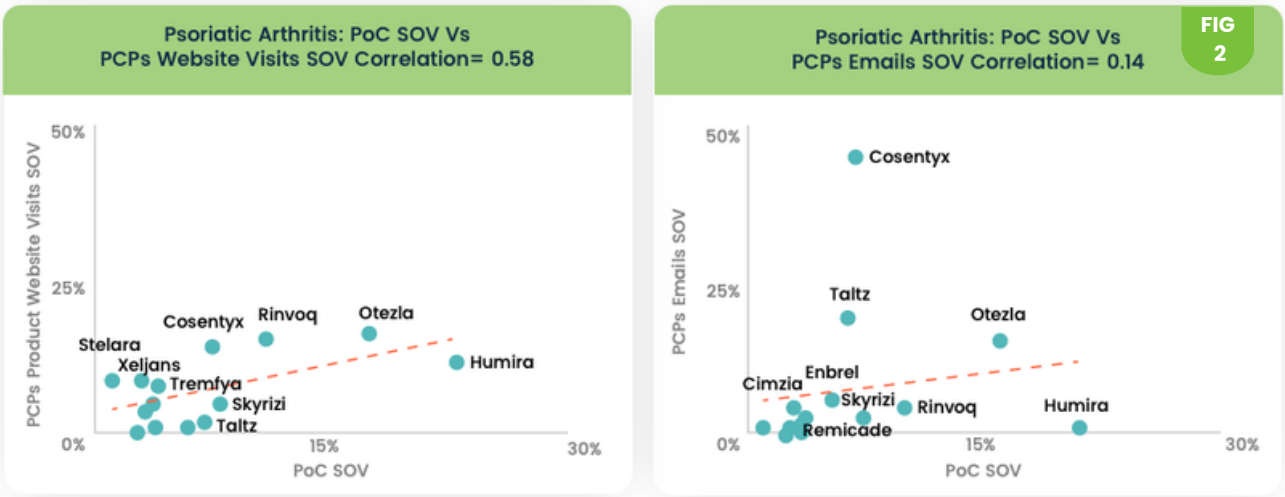
To start, we look at which brands are being discussed and we see that the product share of voice is not always intuitive and varies across indications.

In some cases, such as in Crohn's Disease, older, established brands are a central topic across conversations, while in other instances, such as Psoriasis, the discussions are crowded by recent launches.
These varied observations suggest that there are factors beyond the time since launch which influence how front of mind a brand is and its resulting clinical share of voice (PoC SOV).



To understand the effect of different marketing mixes, we ran a linear Pearson correlation between the PoC SOV and that brand's SOV across marketing channels.

The below charts in Fig 2 visualize some sample correlations across channels for the PsA market to illustrate this approach.



Product website visits on the left is universally higher for brands with the highest PoC SOV, especially when compared to the correlation with email campaigns.

Fig 2. PoC SOV correlations across channels for the PsA market
The right chart shows that PCP email campaign activity is dominated by Cosentyx and Talz, and overall has a very weak correlation with PoC SOV.

Table 1 below shows SOV by Psoriasis brand at the point of care in the first column along with SOV for each marketing channel in the following columns.

Marketing Works

The brands are sorted with the highest PoC SOV on top. Brands without any marketing presence in the lower half of the table aren't being discussed, it is truly out of mind, out of sight for them. The PoC SOV is concentrated among brands who have a nominal Share of Voice across marketing channels.

Within the brands who do have a marketing presence, we can see commonalities but varied strategies in place with different amounts of investment across channels.

Psoriasis SOV across marketing channels — TABLE 1

Psoriasis Brands	PoC SOV	Product Website	Sales Reps	Paid Search	Facebook	Web Brand Encounters	Email	TV	Web Ads
Otezla	30%	30%	9%	10%	12%	13%	29%	7%	12%
Zoryve	16%	0%	12%	23%	12%	0%	0%	0%	1%
Sotyktu	16%	10%	13%	13%	53%	23%	0%	31%	15%
Vtama	14%	6%	14%	0%	0%	1%	0%	0%	2%
Skyrizi	6%	10%	11%	10%	0%	15%	5%	45%	8%
Humira	4%	14%	5%	10%	0%	8%	0%	0%	1%
Taltz	4%	2%	12%	10%	0%	3%	30%	0%	30%
Tremfya	4%	5%	11%	13%	24%	2%	3%	9%	16%
Cosentyx	1%	24%	10%	10%	0%	19%	24%	9%	14%
Stelara	1%	0%	4%	0%	0%	0%	0%	0%	0%
Wynzora	1%	0%	0%	0%	0%	0%	0%	0%	0%
Duobrii	1%	0%	0%	0%	0%	0%	0%	0%	0%
Ilumya	1%	0%	0%	0%	0%	0%	0%	0%	0%
Enbrel	1%	0%	0%	0%	0%	16%	9%	0%	0%
Cimzia	0%	0%	0%	0%	0%	0%	0%	0%	0%
Correlation to PoC SOV	1.00	0.57	0.56	0.48	0.45	0.29	0.29	0.22	0.22

Looking at some individual examples from table 1, we can look how the brands share of voice for each channel fits into this model.
The columns are sorted left to right by the marketing channels most closely correlated with PoC SOV. Brands with investment concentrated on left side of table have higher PoC SOV which indicates that these are more impactful channels that effectively drive brand mentions during treatment conversation.

Otezla, Zoryve, Sotyktu, which each account for >15% of the PoC SOV, all emphasized product websites, paid search, and/or social media in their marketing strategies.

Skyrizi, Taltz, Cosentyx, each with <7% PoC SOV, all emphasized TV or email in their marketing strategies, indicating that these channels do NOT effectively drive brand mentions during treatment conversations.

PoC SOV Correlation with Marketing SOV

TABLE 2

Channel	I/I Average	Crohn's Disease	Plaque Psoriasis	Psoriatic Arthritis
Product Website Visits	0.6	0.63	0.57	0.58
Web Browsing Encounters	0.39	0.75	0.29	0.12
Paid Search	0.34	0.15	0.48	0.38
Sales Reps	0.33	0.04	0.57	0.4
Facebook	0.31		0.45	0.17
TV Ads	0.11	-0.04	0.22	0.15
Web Ads	0.09	0.03	0.22	0.02
Emails	-0.08	-0.68	0.29	0.14

Looking wider and applying this correlation approach across indications, shown in Table 2, we see similar correlations holding up, suggesting that some marketing channels drive PoC SOV more effectively than others.

- Customer behaviors (website visits, brand encounters across web) are most closely correlated with brand mentions during treatment conversations
- Pull advertising is next (paid search, social media)
- Push advertising is last, with digital (web ads, emails) trailing TV for the least correlated with exam room brand mentions

This suggests a hierarchy of utility across marketing channels which pharma brands can use to prioritize investment and inform their approach.

The 'So What?'

What can we learn from this? What does this mean for brand teams?
This exercise has demonstrated that PoC SOV is a valuable leading indicator to predicting market share and should be tracked by brand teams. Coupled with the in-depth insights that come from hearing authentic examples from key moments makes HCP-Pt conversation research an invaluable real-time asset for brand teams.

This has also demonstrated that there are clear differences in the impact of marketing channels which can be leveraged to optimize marketing mix strategies.

Exposure to marketing channels that are more under control of customers or require an initial customer action ("pull" channels - e.g., product website visits, paid search) are closely correlated with the frequency of brand mentions during treatment conversations.

This suggests that pull advertising can be especially effective and that digital behavior monitoring can be a useful tool to predict which drugs will be discussed most within actual treatment conversations.

Marketing channels that are less targeted and do not require an initial customer action (“push” channels - e.g., emails, web ads, TV) are less tightly coupled (or may be even negatively correlated) to PoC SOV

Push advertising, if not well executed, may not contribute to a brand's success. Learn to improve its effectiveness through Perxcept insights.

Conclusions

PoC SOV is a powerful metric to understand how treatment decisions are playing out in the real world as getting discussed in the exam room is a critical step to getting prescribed

This PoC SOV correlates directly with customer information-seeking (pull) behavior and can be predicted by actively measuring customer digital behavior.

There is tangible value here in taking a holistic approach to measuring both exposure and impact across marketing channels and critically, comparing it to benchmark data from direct competitors.

The data required by this approach are very difficult to measure with traditional techniques, but ZoomRx has built the unique capability with access to quality data for all brands across all channels.

These findings imply that there are big opportunities to improve marketing spend. This can be done in a few key ways:

- Actively track and understand customer digital behavior as leading indicator
- Monitor what your competitors are doing and which channels are effective within your market

- Generally, prioritize on pull over push marketing to lead the market SOV in high-impact, targeted channels (e.g., paid search, website) over high-reach channels (e.g., TV, email)

To read more about our omnichannel capabilities at ZoomRx and how we're tackling the marketing mix challenge for our clients

CLICK HERE

ZoomRx embraced AI in 2023

To read more about how we've integrated these large language models to make Point of Care dialogues more accessible through applications of LLMs and our proprietary pharmaceutical industry Ferma.ai engine,

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Reach out to learn more at

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