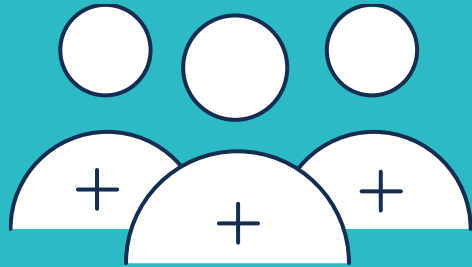


The Oncology Promotion Playbook

4 Strategies to Increase
Success in 2023





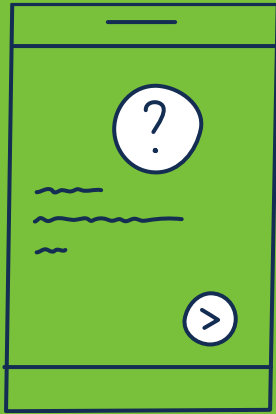
Rethinking how companies market to oncologists in 2023

It is notoriously difficult to capture Oncologists' attention today—but ZoomRx was determined to unlock the secret.

And we have the data to find out. We analyzed:

- > 80,000 interactions between pharma and oncologists
- > 14,000 tweets from oncologists
- > 380 conversations between HCPs and patients
- > 150 oncologists' digital behavior
- 10 in-depth interviews with oncologists in the trenches

We found out what makes Oncologists tick, what they want to know, where they get their information, and what they want from pharma.



What we asked

- As oncologists get busier and less available, how do effective companies optimize oncologist attention?
- How do companies better partner with oncologists in this changing environment?
- How can marketers cut through the noise and reach oncologists with impactful omnichannel messages?
- How do companies better understand and use digital influencers to enhance their messaging?



**Oncologists are
Overwhelmed**

The oncologist workforce is changing

Pharma must prepare for increasingly burned-out physicians with new terms of engagement

SNAPSHOT OF CHANGING HCP DEMOGRAPHICS

In 2021,

117,000

doctors left the work force, while fewer than

40,000

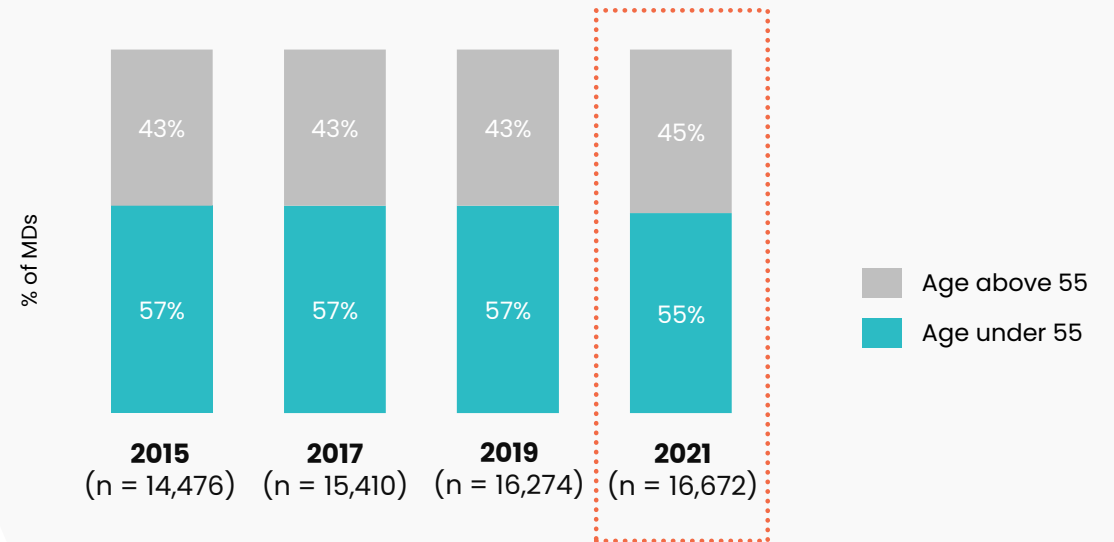
joined it

In 2022,

1 in 5

doctors said that they plans to leave their practice within the next ~3 years

ACTIVE HEMATOLOGISTS & ONCOLOGISTS BY AGE



“People **leave the healthcare field completely** because of **perceived lack of appreciation** and the **risk involved.**” – Academic Oncologist



22%

oncologists are nearing retirement (64+) in 2022

Many oncologists continue to grapple with the fallout from COVID-19

Pharma is reaching oncologists who are busier now more than ever

STAFFING CHALLENGES

“People are having to pull double shifts and then, triple shifts to extend staff availability.

You have your nurses covering in the ICU...And then, having to pay...crisis pay.”

– Academic Oncologist

“We have quite a bit of attrition after COVID.

So that was definitely a big issue.”

– Community Oncologist

“One of the biggest concerns of our practices is staffing. Nursing to, pharmacists...

to front desk staff, to medical coders.”

– Community Oncologist

IMPACT ON PATIENT CARE

“[COVID] really does [have an] impact because patients haven't returned to their regularly scheduled preventative maintenance yet.”

– Community Oncologist

“Because of delays in getting appointments, we really noticed an increase in patients presenting with locally advanced or advanced disease.”

– Academic Oncologist

“One of the major issues we've had... is the inability of patients to get back and forth to medical centers, because of concerns about COVID.”

– Academic Oncologist

Strapped for time, oncologists struggle to dialogue with patients

Oncology patients have the lowest share of voice in HCP interactions

2022 PATIENT SHARE OF VOICE AND LENGTH OF HCP-PATIENT INTERACTION

Jan – Dec '22 | 380+ interactions

Therapeutic Area	Patient SoV	Avg Length (min)
Central Nervous System	31 %	9.4
Infectious Disease	20 %	7.3
Cardiovascular	20 %	8.0
Respiratory	19 %	8.3
Gastrointestinal	19 %	6.6
Dermatology	18 %	5.1
Ophthalmology	16 %	7.6
Metabolic Disorders	15 %	5.7
Oncology	14 %	6.7

LIMITED APPOINTMENT TIME FOCUSES ON TESTING RESULTS AND TREATMENT OPTIONS

“**That's why we did that test** and the results showed that you have that MSI, Microsatellite instability, with high-level, **which makes you extremely suitable for immunotherapy**, which should work better than chemotherapy.”

– Community Oncologist (Prostate Cancer Patient)

“We found out that your leukemia has a certain mutation called FLT3-ITD. **I know, you've never heard of that, but this means that you're going to get a certain treatment in addition to the chemotherapy.**”

– Community Oncologist (AML Patient)

Treatment information overload is their main challenge

Oncologists struggle to keep pace with the speed of pharma innovation

“There’s so much **new information coming out every day and it’s really becoming very hard to keep up.**”

– Academic Oncologist

“There are a lot of options for patients, but it also requires us as doctors to know a lot. **That’s part of the burnout...This is the information overload.**”

– Academic Oncologist

“**Keeping up with the volume of information that’s coming [is a challenge].** There are just a ton of drugs on the horizon.”

– Community Oncologist

“**I feel like there’s new stuff coming out every week, multiple times a week** on some TKI or monoclonal for some indication, which has a name I’ve not heard before.”

– Community Oncologist

“**Staying current** with treatment guidelines and FDA approvals and/or new indications...**that’s all very challenging as well.**”

– Community Oncologist

“**There is more and more information out there all the time.** I mean, information always increases, it never decreases.”

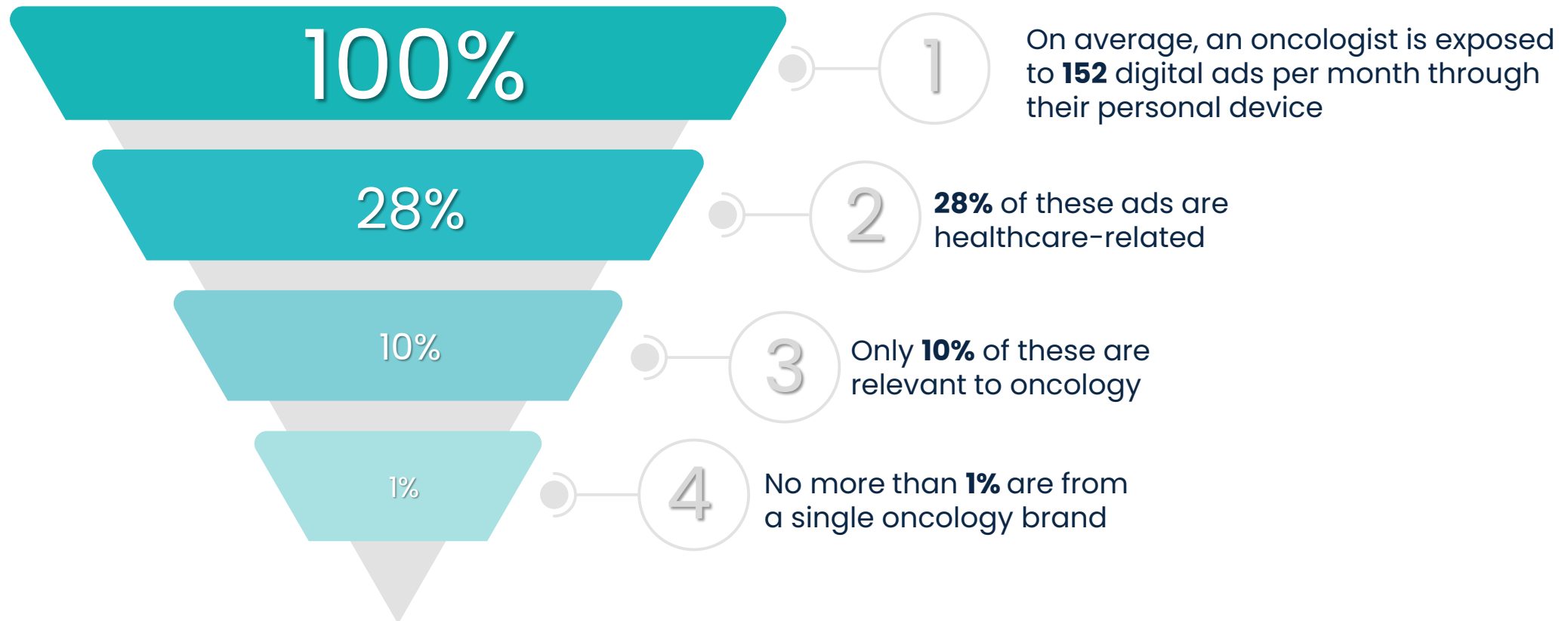
– Academic Oncologist

This information overload is exasperated by constant digital ad exposure

Pharma is fighting for oncologist's attention online as well as off

ONCOLOGIST DIGITAL AD EXPOSURE

Jan – Dec '22 | Based on digital ad exposure among 150+ Oncologists



Branded oncology ad exposure is fragmented

Pharma must think of new ways to stand out in a crowded space

ONCOLOGISTS' BRANDED ONCOLOGY DIGITAL AD EXPOSURE

Jan – Dec '22 | Based on digital ad exposure among 70+ Oncologists





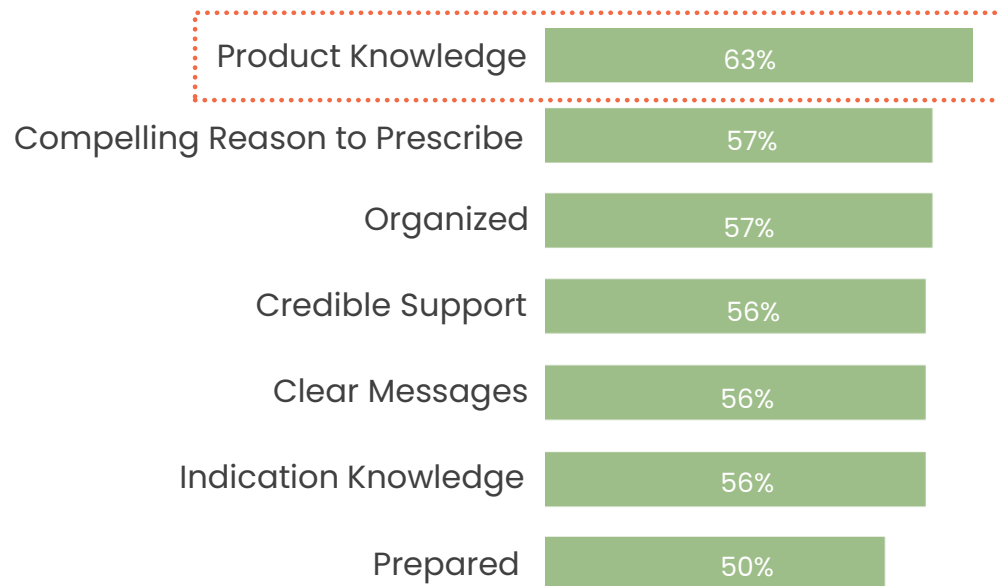
**Oncologists
Need Support
from Pharma**

Overwhelmed with information, oncologists lean on reps for product details

Prioritize robust product training and position reps as knowledge partners

IMPACT OF REP ATTRIBUTE ON ONCOLOGIST OVERALL CALL QUALITY RATINGS

Jan – Dec '22 | Based on 13,800+ rep-oncologist Interactions (% correlation*)



“The representatives are welcome...and I like to talk to them. They talk about their data, and we want to hear about that...**I would say more than 90% reps are very good.**”
– Community Oncologist

“**[The best rep is] someone who's knowledgeable and can anticipate what...you're going to be asking about,** and can provide that information in a concise, in a quick manner.”
–Academic Oncologist

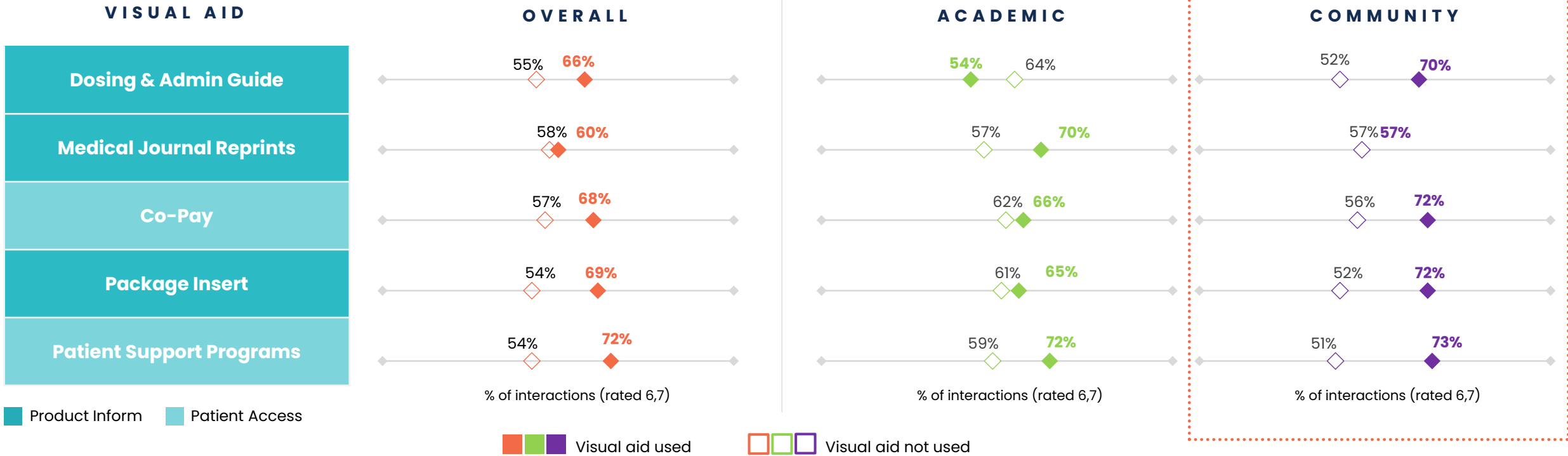
*Methodology: Kendall (Tau) correlation, a measure of the relationship between variables. The Tau correlation coefficient ranges from -1 to 1, where -1 indicates a perfect negative correlation, 1 indicates a perfect positive correlation, and 0 indicates no correlation.

Oncologists crave the right product and access support to help their patients

Especially community oncologists who seek more educational resources

LIKELIHOOD TO INCREASE PRESCRIBING AFTER VISUAL AID USAGE

Jan '22 – Dec '22 | Based on 13,000+ rep-oncologist interactions



“The majority of cancer patients in the United States are treated in a community setting... **There needs to be dedicated outreach to community practices in terms of education.**” – Community Oncologist

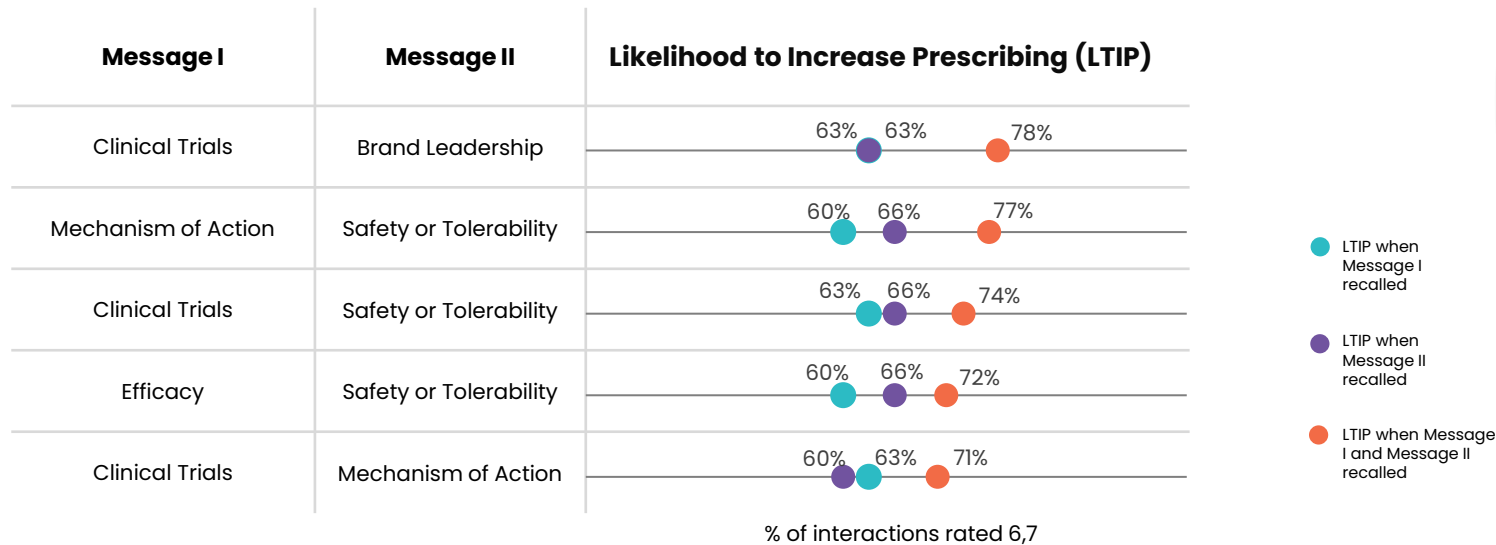
Winning messaging strategies integrate key safety and clinical trial data

Pharma can build effective messaging with clear, concise, clinical narratives

MESSAGING STRATEGY ANALYSIS

2021 – 2022 | Based on 30,000+ HCP interactions with 500+ brands

MESSAGE COMBO IMPACT



Clear

Pitches with **3-5 messages** are most likely to drive prescribing

Concise

Messages with **10-14 words** are rated as most differentiating

Clinical

Clinical information is rated as most effective



“Successful [reps] show me **new data, updates that I’m not aware of. And the rep really knows the data well and can help me understand the product better.**” –Academic Oncologist

Even when reps get it all right, they don't always close

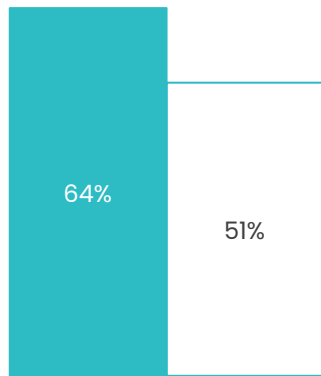
Reps leave money on the table—especially in virtual meetings

Closing is linked to positive prescribing intent...

LIKELIHOOD TO INCREASE PRESCRIBING POST-DETAIL

Jan '22 – Dec '22

% of interactions (rated 6,7)



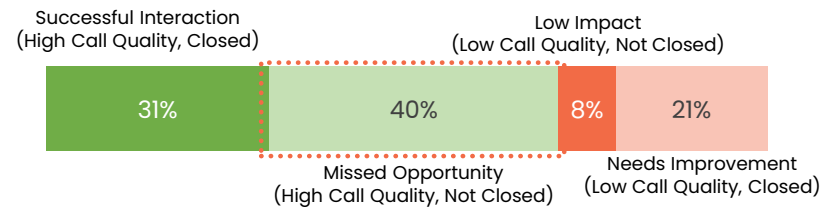
(2,400+ interactions) (3,800+ interactions)

■ Rep closed □ Rep did not close

...However, effective reps don't always close...

REP-ONCOLOGIST INTERACTIONS CLOSED

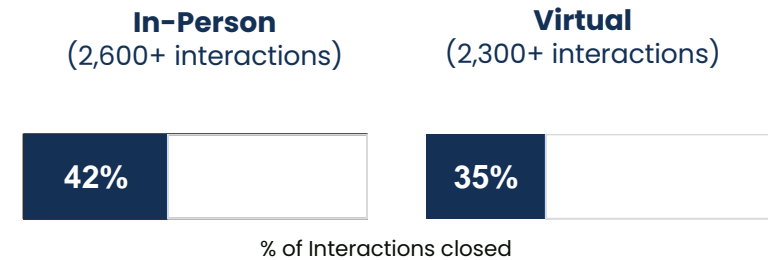
Jan '22 – Dec '22



...Especially when it comes to virtual details

REP-ONCOLOGIST INTERACTIONS CLOSED

Jan '22 – Dec '22





**Oncologists' Info
Sources are
Diverse + Digital**

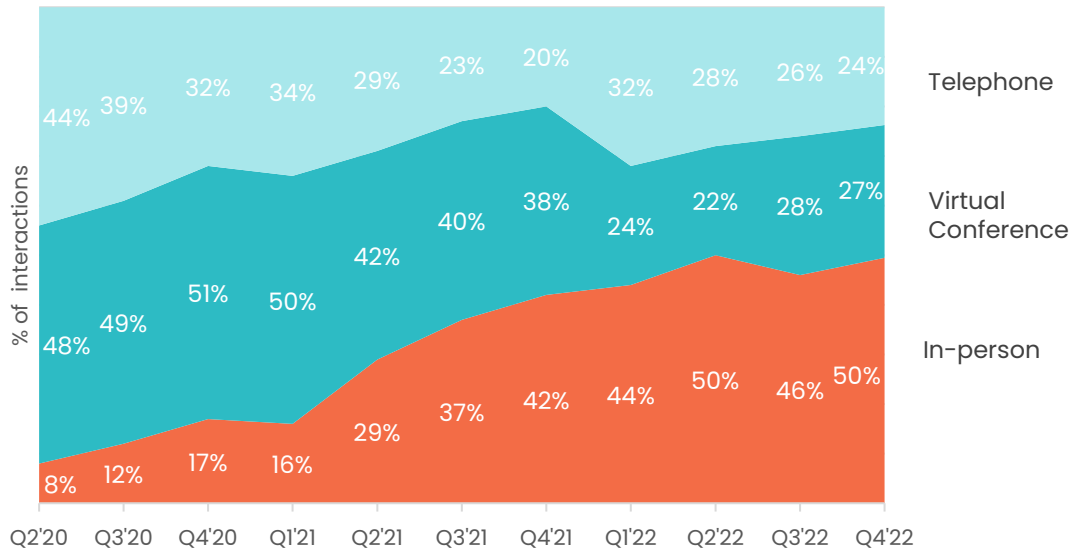
For increasingly online oncologists, virtual rep engagement is here to stay

Pharma must adapt as oncologist preferences change

Even as in-person interactions increase, virtual remains a key part of the sales model

SHARE OF SALES REP INTERACTIONS BY TYPE

Apr '20 – Dec '22



“[Rep interactions are] about 80% virtual, 20% in-person. **We still have limitations for any in-person [meetings].**”
 – Academic Oncologist

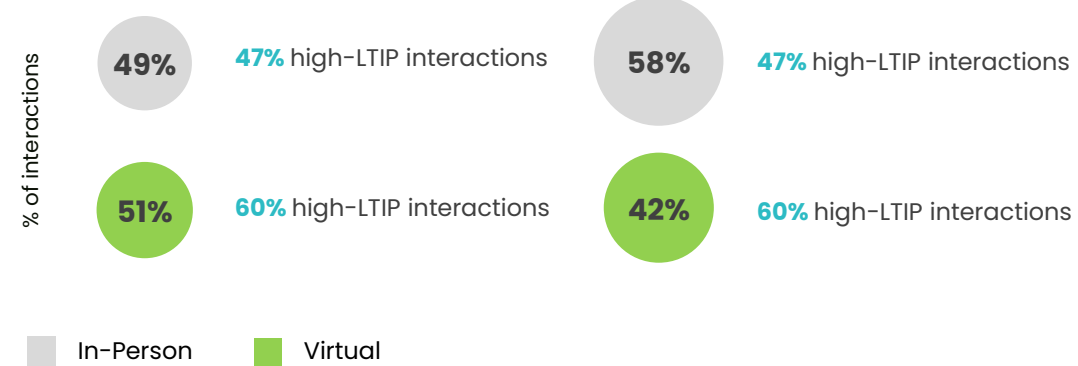
Virtual impact is higher among both settings; academics prefer virtual

LIKELIHOOD TO INCREASE PRESCRIBING POST-REP-INTERACTION

Jan '22 – Dec '22

Academic
(2,300+ interactions)

Community
(7,100+ interactions)



“Close to 80% of my interactions these days are virtual. I think the **virtual meetings really satisfy most of the needs that I have.**”
 – Academic Oncologist

Oncologists go online for easy access to credible treatment information

Pharma can optimize paid and earned strategies by prioritizing the most impactful channels

TOP NON-PERSONAL PROMOTIONAL CHANNELS BASED ON LIKELIHOOD TO INCREASE PRESCRIBING

Jan – Dec '22 | Based on 500+ Oncologist-NPP Interactions



% of interactions (rated 6,7)

Covered on subsequent slides

43%

of oncologists cite journal articles as their preferred source of treatment information, second only to the NCCN Guidelines (62%)

@ASCO, @Oncoalert & @MDAndersonNews

website handles are top-mentioned sources by oncologists on social

Email outreach

is nearly 3x more likely to drive online browsing activity than rep visits



"I use **[NCCN Guidelines]** almost every week, multiple times a week. Then another website called **HemOnc Wiki.**"

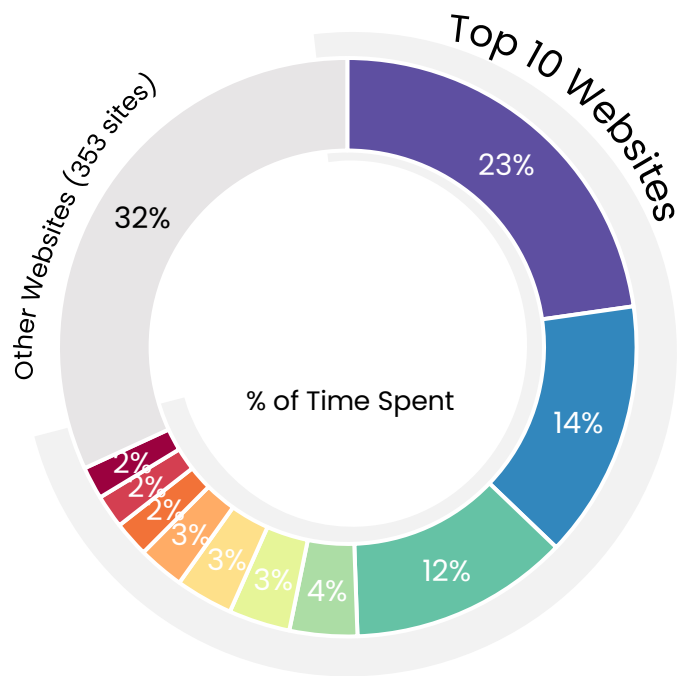
– Academic Oncologist

When oncologists go online, they tend to focus on a few key websites

Pharma digital dollars go further by meeting oncologists where they are online

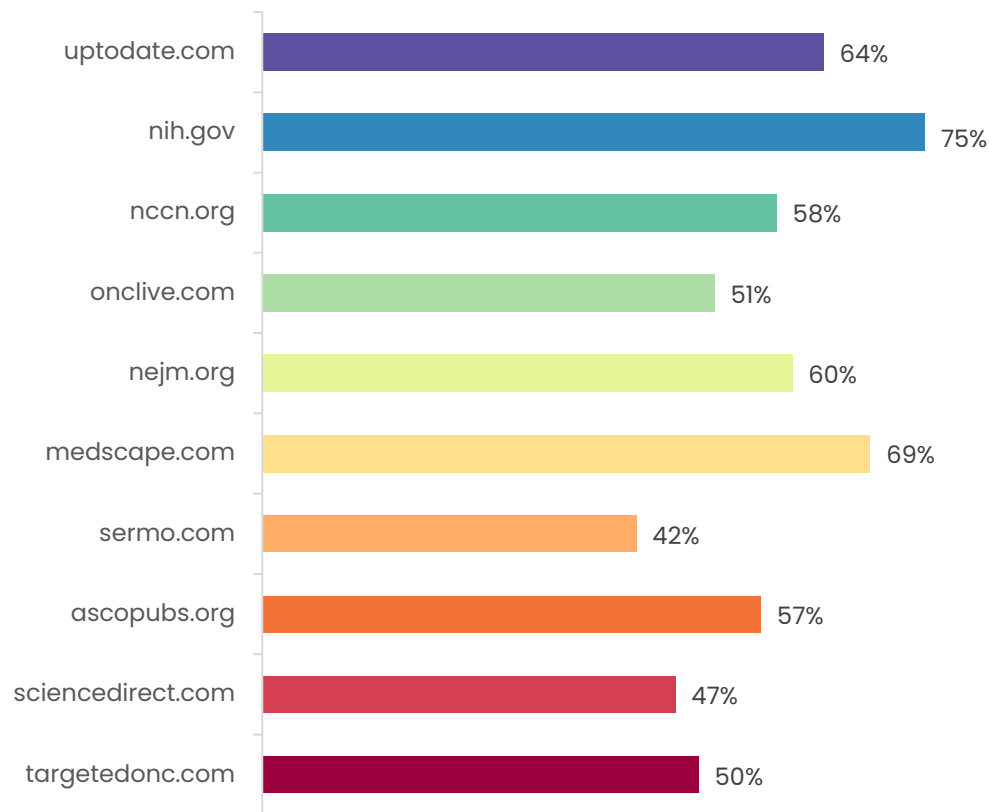
SHARE OF TIME SPENT BROWSING BY ONCOLOGISTS

Jan – Dec '22 | Based on 450+ hours of browsing by 150+ oncologists



WEBSITE REACH AMONG ONCOLOGISTS

Jan – Dec '22 | Based on impressions among 150+ oncologists



“Websites that help us to **quickly find the information that we need** often rise to the top.”

– Academic Oncologist

Oncologists are especially engaged by new info in digital ads

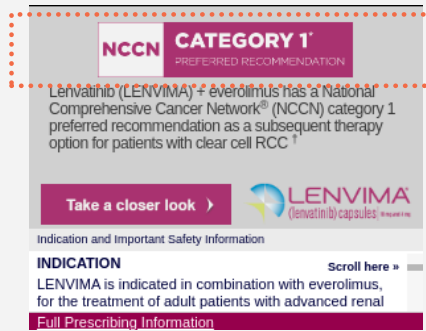
Pharma can prioritize digital spend by highlighting new data and product information

TOP CAMPAIGNS VIEWED BY ONCOLOGISTS

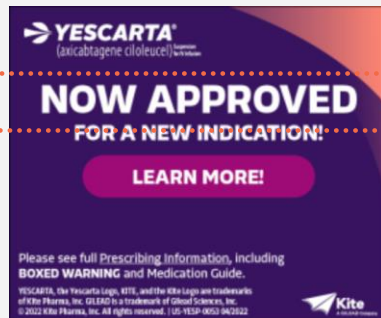
Jan '21 – Dec '22 | Based on number of impressions among 150+ oncologists



19% Oncologists Encountered
Feb '22 – Dec '22



11% Oncologists Encountered
Jan '22 – Sep '22



8% Oncologists Encountered
Apr '22 – Sep '22

"At this point, **I want to know about new drugs, new approvals, clinical trials.** I want to know the new stuff."
– Community Oncologist

"Sometimes the title of that email is attractive. **Say this is a drug, this is now approved for something** and, you know, I might not know about, **so I clicked on it.**"
– Academic Oncologist

"[The ad] was probably either a **new indication or an update on some data or something.** It probably said, 'new updated keynote trial, five-year OS' or something like that, **which made me click on it.**"
– Academic Oncologist

Omnichannel marketing drives greater engagement

Effective brands integrate multichannel promotions with oncologists at the center

CASE STUDY

Change in Browsing Behavior Following a Rep Interaction

Sales rep interactions drive more depth in Therapeutic Area (TA)-related web browsing and branded ad recall

MONTH BEFORE REP INTERACTION

HCP browsing behavior in the month preceding a sales rep interactions




MONTH AFTER REP INTERACTION

HCP browsing behavior in the month following a sales rep interaction



Dec '21 – Jun '22 (62 interactions)



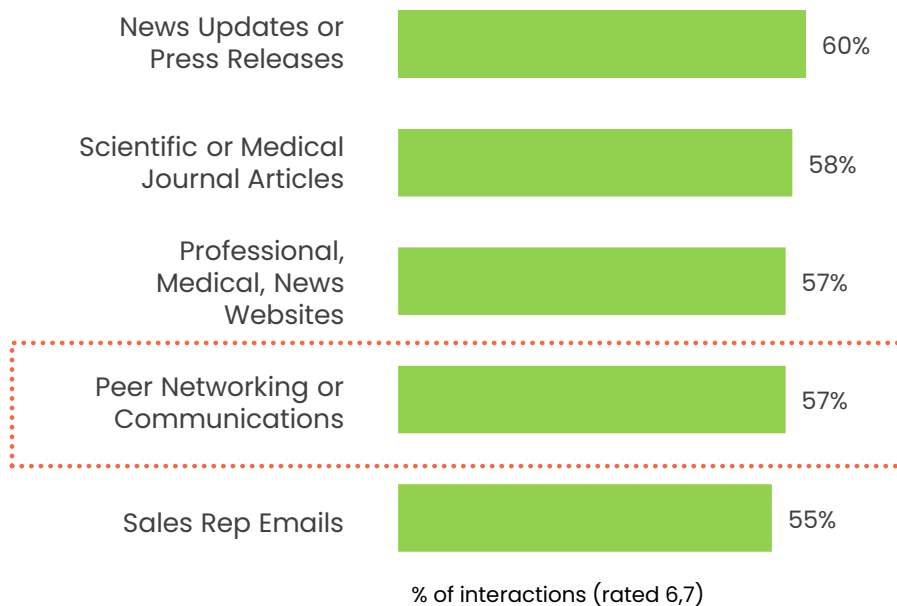
**Oncologists
Want Social
(Not Siloed)
Interactions**

Facilitating peer communication is key

Highlight KOLs in promotions and create opportunities for oncologist-to-oncologist engagement

TOP NON-PERSONAL PROMOTIONAL CHANNELS BASED ON LIKELIHOOD TO INCREASE PRESCRIBING

Jan – Dec '22 | Based on 500+ oncologist-NPP interactions



“If you have a **good, charismatic speaker**, you can really have a good back and forth and isn't just reading the slide data to you. **[One that's] able to answer...questions that come up in the clinic and things like that...reimbursement.**”
 – Academic Oncologist

“We have a **weekly meeting of all our colleagues and we do have an exchange of ideas** in this setting, which is useful.”
 – Community Oncologist

Digital influencers are becoming more and more significant

Enhance traditional KOL strategies by partnering with industry-friendly digital influencers

TOP ONCOLOGY INFLUENCERS AMONG ONCOLOGISTS

May '22 – Dec '22 | Based on followership and oncology tweet engagement among 500+ oncologists



Les Yonemoto
@protoninfo



- 70.4K followers
- 17% oncology social panel followers

Bio

Radiation Oncologist, Consultant at **Proton Therapy Center Development**

Industry Partnerships

- Celgene
- Seagen

Top Tweets

Les Yonemoto, MD MBA @protoninfo

Study: Widespread reductions in cancer screenings during the COVID-19 pandemic may be associated with delayed cancer diagnoses and increased mortality for breast, cervical and colon cancers
#Pandemic #Cancer #Medtwitter #BCSM #GynCSM #Covid19



Vivek Subbiah
@VivekSubbiah



- 25.4K followers
- 49% oncology social panel followers

Bio

Oncologist, Associate Professor, Executive Director - Research, **MD Anderson Cancer Network**, Medical Director, **Clinical Center for Targeted Therapy**

Industry Partnerships

- Eli Lilly
- Roche
- Eisai
- AstraZeneca
- Novartis
- Janssen

Top Tweets

Vivek Subbiah, MD @VivekSubbiah

First 2022 saw publication of Hallmarks of Cancer: New Dimensions @CD_AACR @AACR @ElizSMcKenna aacrjournals.org/cancerdiscover...



Naoto T Ueno
@teamoncology



- 13.7K followers
- 16% ZoomRx oncology social panel followers

Bio

Director, **University of Hawai'i Cancer Center**, Medical Oncologist. Inflammatory Breast Cancer. Tumor Micro environment

Industry Partnerships

- Chugai Pharma
- Sysmex America
- Eisai
- Daiichi Sankyo
- Takeda Pharma
- Kyowa Kirin
- Sumitomo Pharma
- Gilead

Top Tweets

Naoto T Ueno, MD, PhD @teamoncology

HER2 breast cancer theoretically has four categories with HER2-ADC trial.
1. HER2 high - DESTINY03
2. HER2 low - DESTINY04
3. HER2 ultra-low - DESTINY06
4. HER2 null - DAISY
Very interesting/exciting to know how we will practice in the near future. #bcsm #Oncoalert

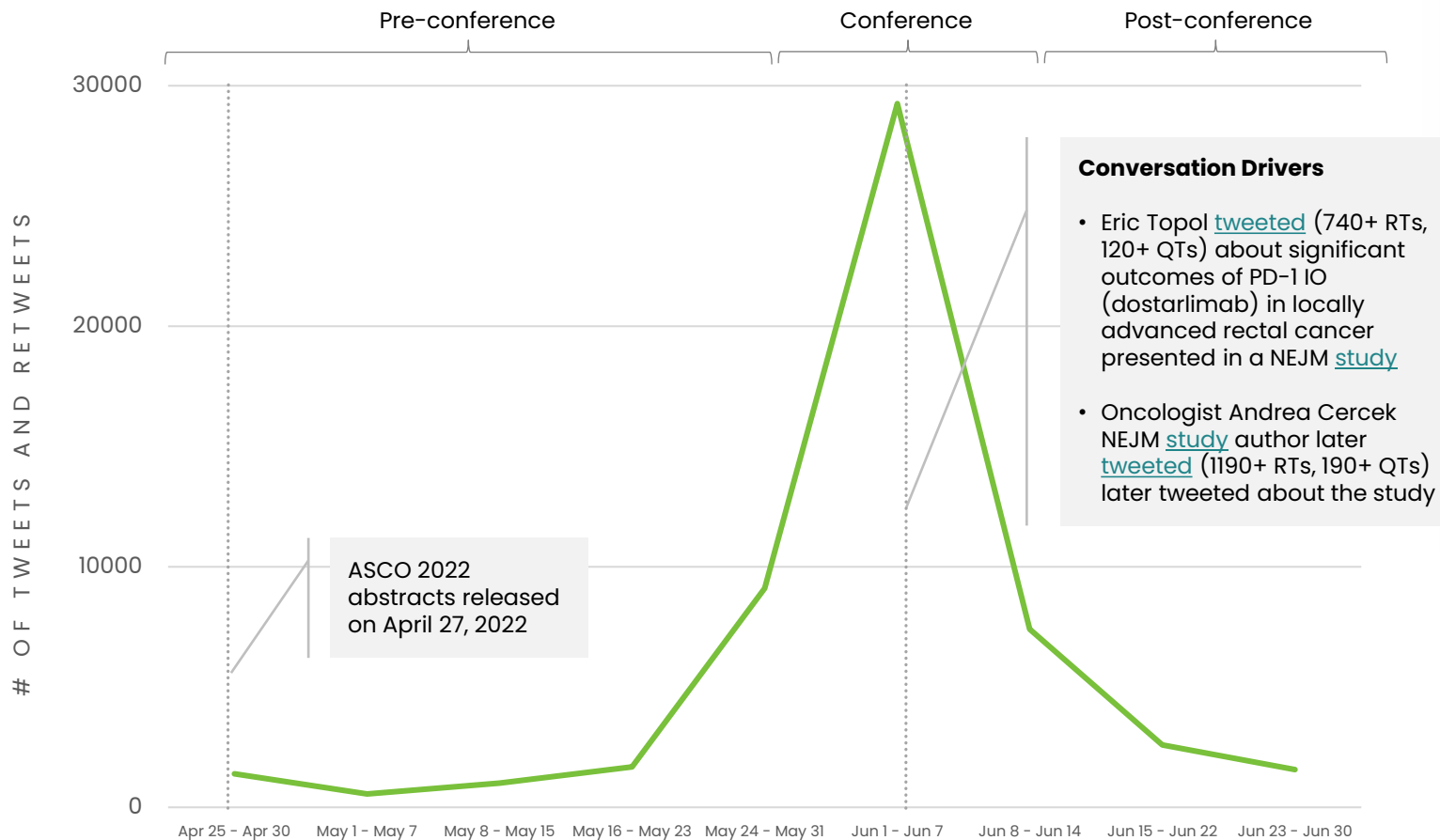


"I have a few [oncologists] that I follow...I just check them out and figure out if they're worth following or not." – Academic Oncologist

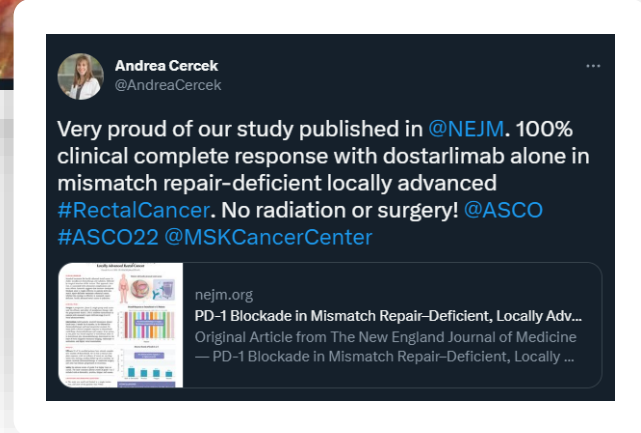
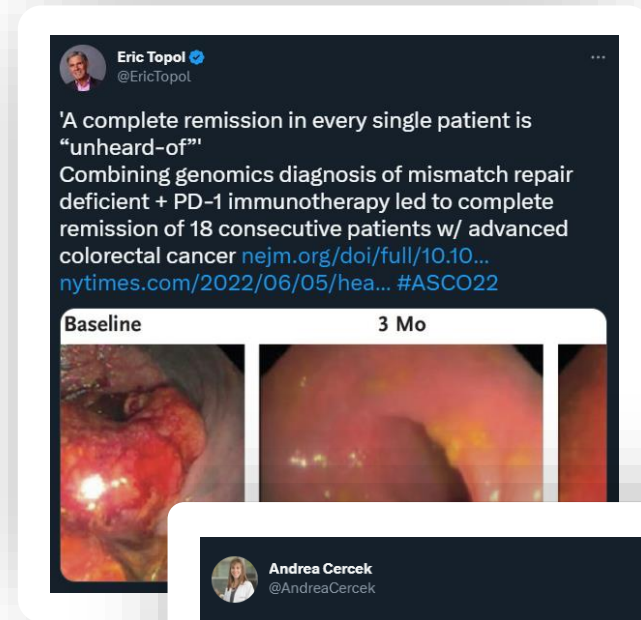
Peer and influencer content drives social engagement

Partner with digital influencers and PIs to amplify data during medical congresses

ASCO 2022 SOCIAL COVERAGE AND CONVERSATION



- Conversation Drivers**
- Eric Topol [tweeted](#) (740+ RTs, 120+ QTs) about significant outcomes of PD-1 IO (dostarlimab) in locally advanced rectal cancer presented in a NEJM [study](#)
 - Oncologist Andrea Cercek NEJM [study](#) author later [tweeted](#) (1190+ RTs, 190+ QTs) later tweeted about the study



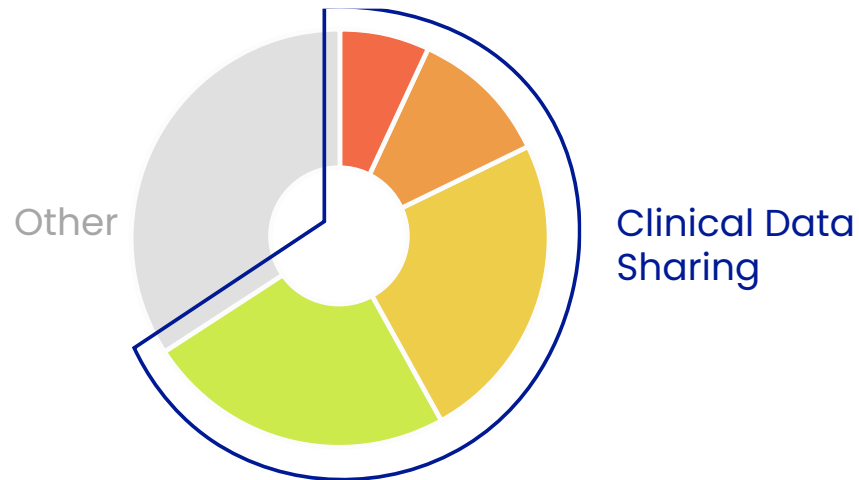
*Based on 54,597 tweets tagged with #ASCO22, #ASCO2022 from Apr 25 - Jun 30

Twitter is also a go-to source for data sharing and medical congresses

Stand out through unique digital engagements informed by social listening

ONCOLOGISTS' TOP-ENGAGED TWITTER CONTENT

May '22 – Dec '22 | Based on 13,900+ tweets by 500+ confirmed oncologists



- Scientific Publications 24%
- Conference Updates/Data 24%
- Clinical Trial Updates 11%
- Treatment Data 5%

- Treatment Approvals 2%
- Disease Awareness 7%
- Personal Anecdotes 4%
- Patient Advocacy 2%

“I would **use Twitter, particularly after conferences** because there were a couple of good accounts in there that recaps and stuff.”
– Academic Oncologist

“I did notice more engagement on social media...I do think that's a good way to engage doctors...One thing I personally like a lot is these companies have a **very clear link to the primary source.**”
– Academic Oncologist

“Now there are tons of outlets for us. We've been in the field for years, so **we clearly can identify those with credible impact on the field.** So as much as it could be very crowded, **it's still a good resource.**”
–Academic Oncologist



Summary

What to remember



Oncologists are overwhelmed. Make every minute count.

.....
Make rep and NPP communications short and impactful



Oncologists need support from pharma. Provide it.

.....
Build a compelling product story and offer patient resources



Oncologists' info sources are diverse + digital. Meet them there.

.....
Focus on virtual visits, key websites, and digital ads with fresh information



They want social (not siloed) interactions. Enlist thought leaders.

.....
Tap into the peer communities and influencers that oncologists rely on



**Questions?
Get in touch**

sara.farina@zoomrx.com
david.johnson@zoomrx.com

How ZoomRx can help evolve strategies in 2023 and beyond



Oncologists are overwhelmed. Make every minute count.

.....
Make rep and NPP communications short and impactful



**OMNICHANNEL
EFFECTIVENESS
TRACKING**

powered by 8M+ benchmarks and 30K+ HCPs to identify impact and trends



Oncologists need support from pharma. Provide it.

.....
Build a compelling product story and offer patient resources



**HCP-PATIENT
CONVERSATION
ANALYSIS**

among target HCPs to understand changing customer and consumer needs



Oncologists' info sources are diverse + digital. Meet them there.

.....
Focus on virtual visits, key websites, and digital ads with fresh information



**PERXCEPT
DIGITAL
ANALYTICS**

to understand HCP digital behavior and identify competitor trends



They want social (not siloed) interactions. Enlist thought leaders.

.....
Tap into the peer communities and influencers that oncologists rely on



**FERMA.AI
SOCIAL
LISTENING**

to identify digital influencers and monitor social conversations

Data Sources Powered by ZoomRx

DATA SOURCE	DESCRIPTION	RATIONALE	REPORT DATA SCOPE
FERMA Social Media	Social listening to monitor engagement in the evolving medical social landscape	<ul style="list-style-type: none"> Identify digital influencers Understand social campaign impact vs. competitors Identify emerging trends and perceptions among target audiences 	13,900 tweets from 537 confirmed oncologists on Twitter
HCP-Patient Conversations	HIPPA-compliant voice recordings of real-life HCP-patient conversations with recruitment tailored to brand team objectives	<ul style="list-style-type: none"> Understand treatment conversations at the point of care Analyze trends in brand message pull-through Identify HCP/patient knowledge/communication gaps 	381 HCP-patient interactions across 9 therapeutic areas from Jan '22 – Dec '22
PERxCEPT Omnichannel Tracking	Proprietary digital web crawler that allows pharma marketers to see exactly what their customers see when they browse their desktop and mobile devices	<ul style="list-style-type: none"> Competitive intelligence Omnichannel marketing intelligence Customer digital behavior analysis 	Powered by 150+ oncologists/hematologists from Feb '21 to present
Promotional Effectiveness Tracking	Quantitative HCP survey that measures a brand's promotional effectiveness against competitors/comparators	<ul style="list-style-type: none"> Analyze brand message performance against competitors/comparators Assess if the salesforce is meeting HCP needs Measure the impact of salesforce influence on market share 	43,000+ sales rep and 41,000+ non-personal promotional interactions reported by practicing HCPs in the US for Oncology from Jan '22 – Dec '22
Qualitative Interviews	45-minute in-depth telephone interviews to understand their main challenges, pharma perceptions and unmet needs	<ul style="list-style-type: none"> Identify key themes related to a core topic among a specific population Gain in-depth understanding of a core topic 	10 academic and community oncologist/hematologist interviews conducted in Jan '22