

The Impact of Digital Promotion on Oncologists

2022 – A Year in Review



Dear Pharma Marketing Community,

We, the Perxcept team at ZoomRx, put together this report to provide insights into the 2022 digital promotional landscape. Though there is much data on how individual brands fare in terms of their own promotional activity, there is little understanding on how this promotional activity impacts HCPs, particularly within the broader context of competing brands vying for the same customer attention.

This report aims to shed some light on the subject by tracking the online activity of 100+ oncologists through their PC and mobile devices, providing unique insights from the perspective of the customer. Among other findings, we discovered that:

- The average oncologist spends ~4 minutes a day on their personal device browsing healthcare-related content
- Only 8% of the display ads they are exposed to are relevant to healthcare
- A substantial proportion of branded website traffic comes from healthcare news articles
- And much more...

I invite you to take a closer look at the report and look forward to hearing from you with any thoughts and/or comments you might have.

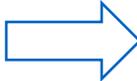
Best,
Mario Fernando, Product Manager @ Perxcept
mario.ashwin@zoomrx.com



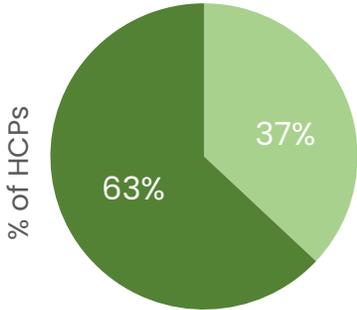
Oncologists on the PERxCEPT Panel

(Jan '22 - Dec '22)

108

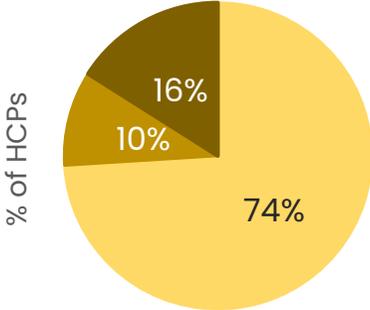


Practice Setting



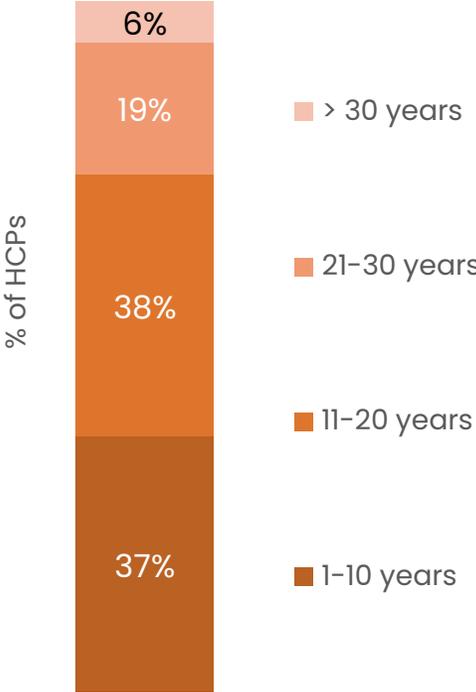
- Academic
- Community

Specialty



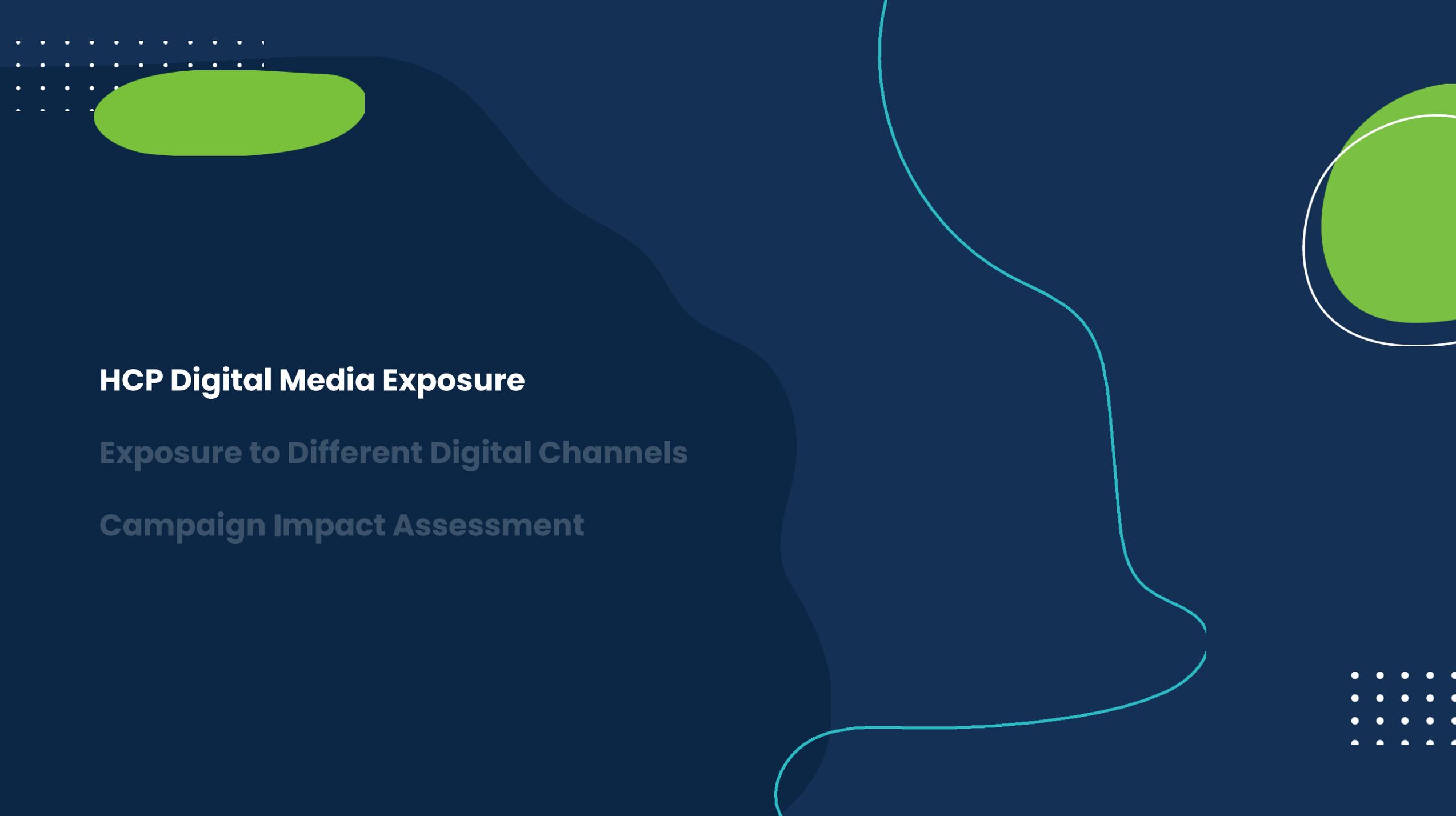
- Hematology Oncology
- Medical Oncology
- Others*

Years of Experience



- > 30 years
- 21-30 years
- 11-20 years
- 1-10 years

* Other speciality includes Radiation oncologists, Surgical oncologists and Pediatric oncologists

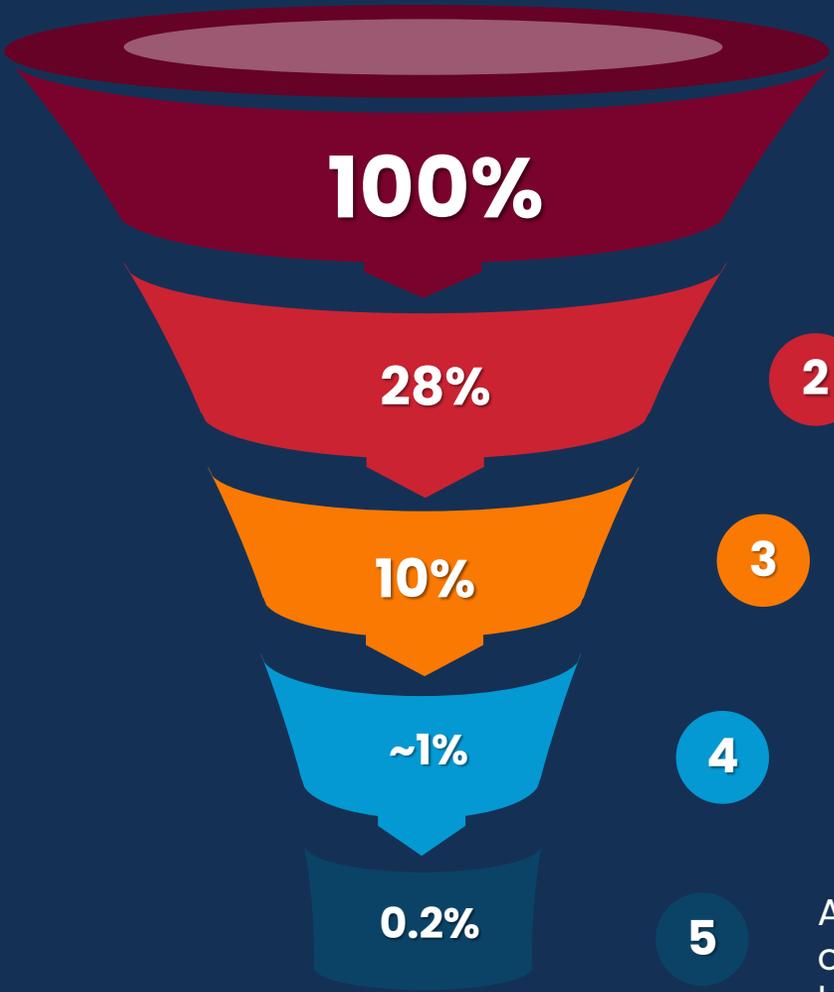


HCP Digital Media Exposure

Exposure to Different Digital Channels

Campaign Impact Assessment

Though the average oncologist is exposed to 150+ display ads per month, only a small proportion of them are relevant to oncology



1

The average oncologist is exposed to **152** display ads per month through their personal devices*

2

28% of display ads are healthcare-relevant

3

And just 10% all display ads are relevant to oncology

4

No more than 1% of ads are relevant to a single indication

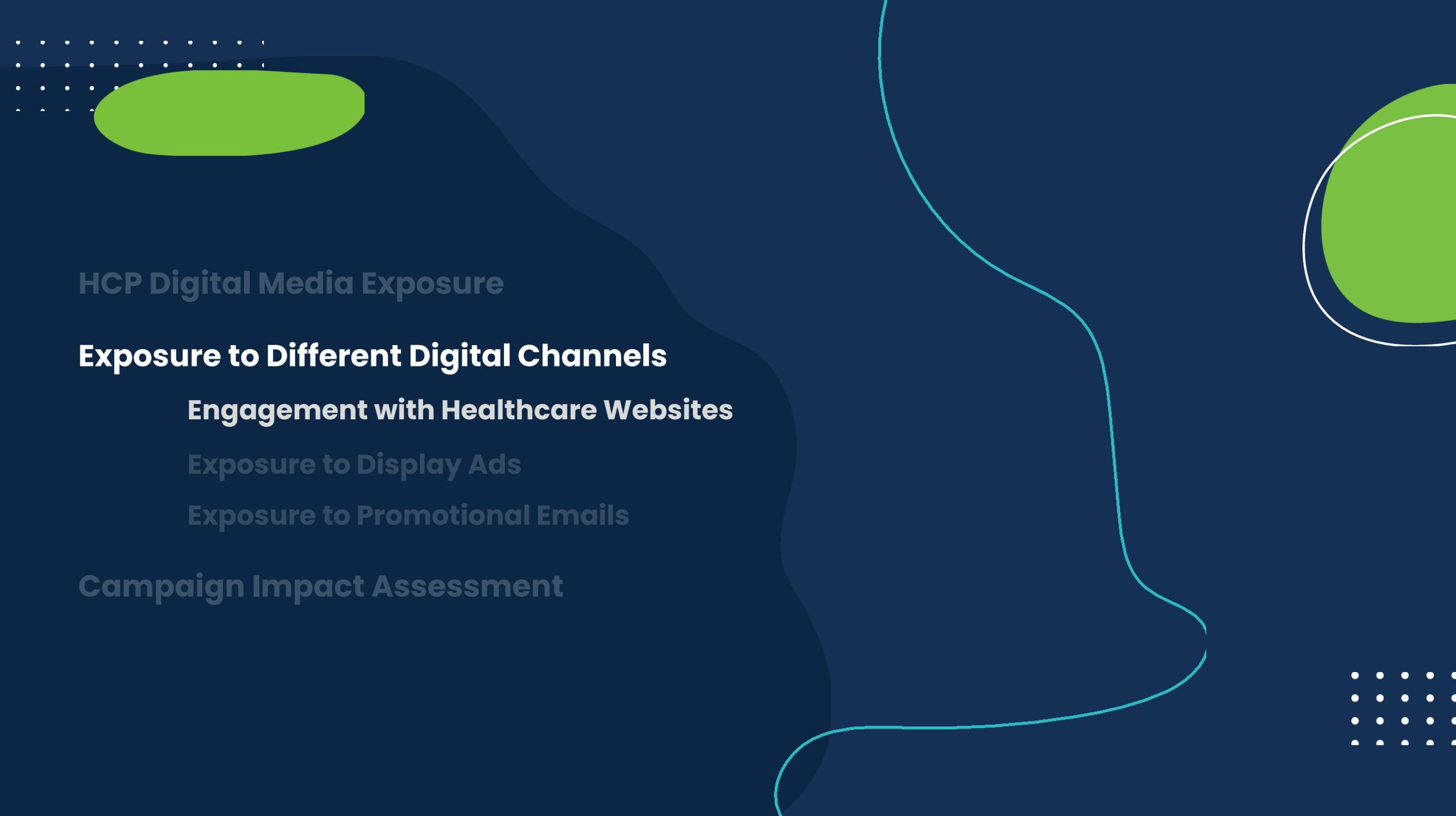
5

And no more than 0.2% of ads are from a single brand

% of Display Ads, by Treatment Area



- Breast Cancer
- Multiple Myeloma
- Non-Small Cell Lung Cancer
- Ovarian Cancer
- Prostate Cancer
- Other / No indication shown*



HCP Digital Media Exposure

Exposure to Different Digital Channels

Engagement with Healthcare Websites

Exposure to Display Ads

Exposure to Promotional Emails

Campaign Impact Assessment



Academic HCPs spend ~35% more time online than Community HCPs, but attention is limited across the board



36 seconds

Median time spent per webpage
(Mean: 43 seconds)

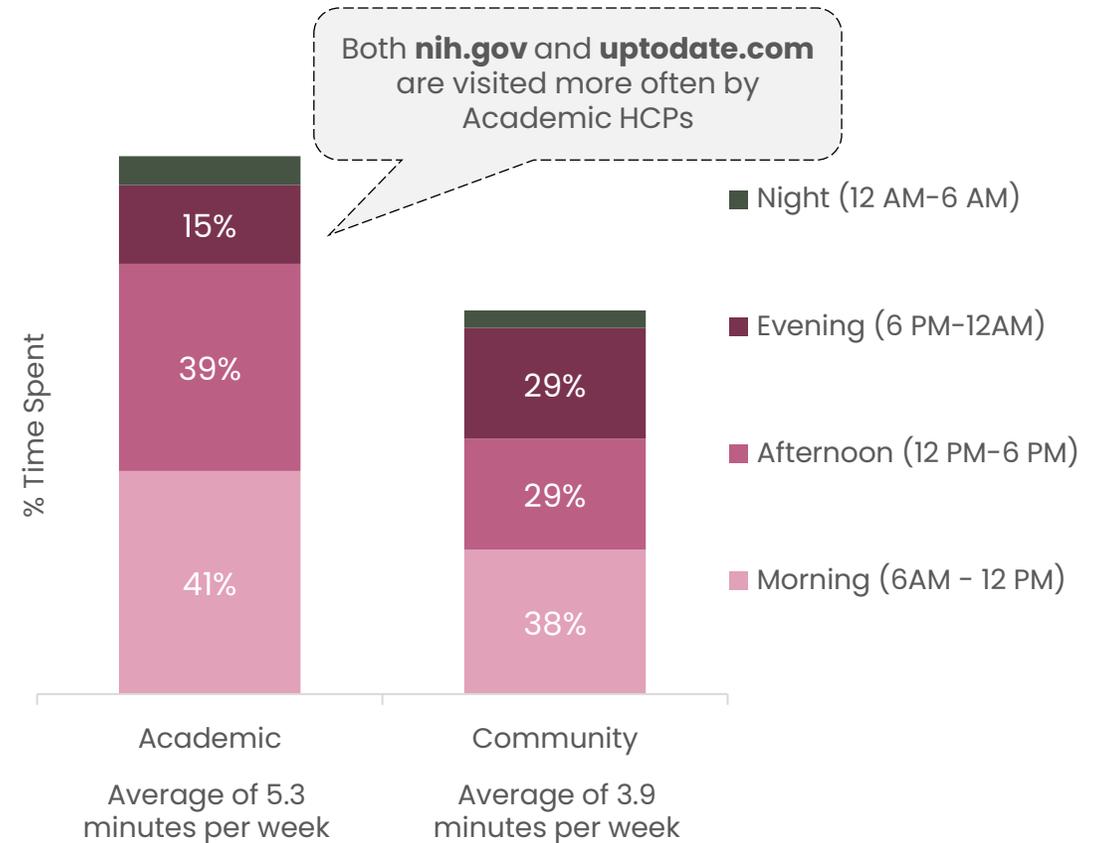


~7

Average no. of healthcare-relevant
webpages browsed per day

Web Engagement – Practice Setting vs Time Of Day

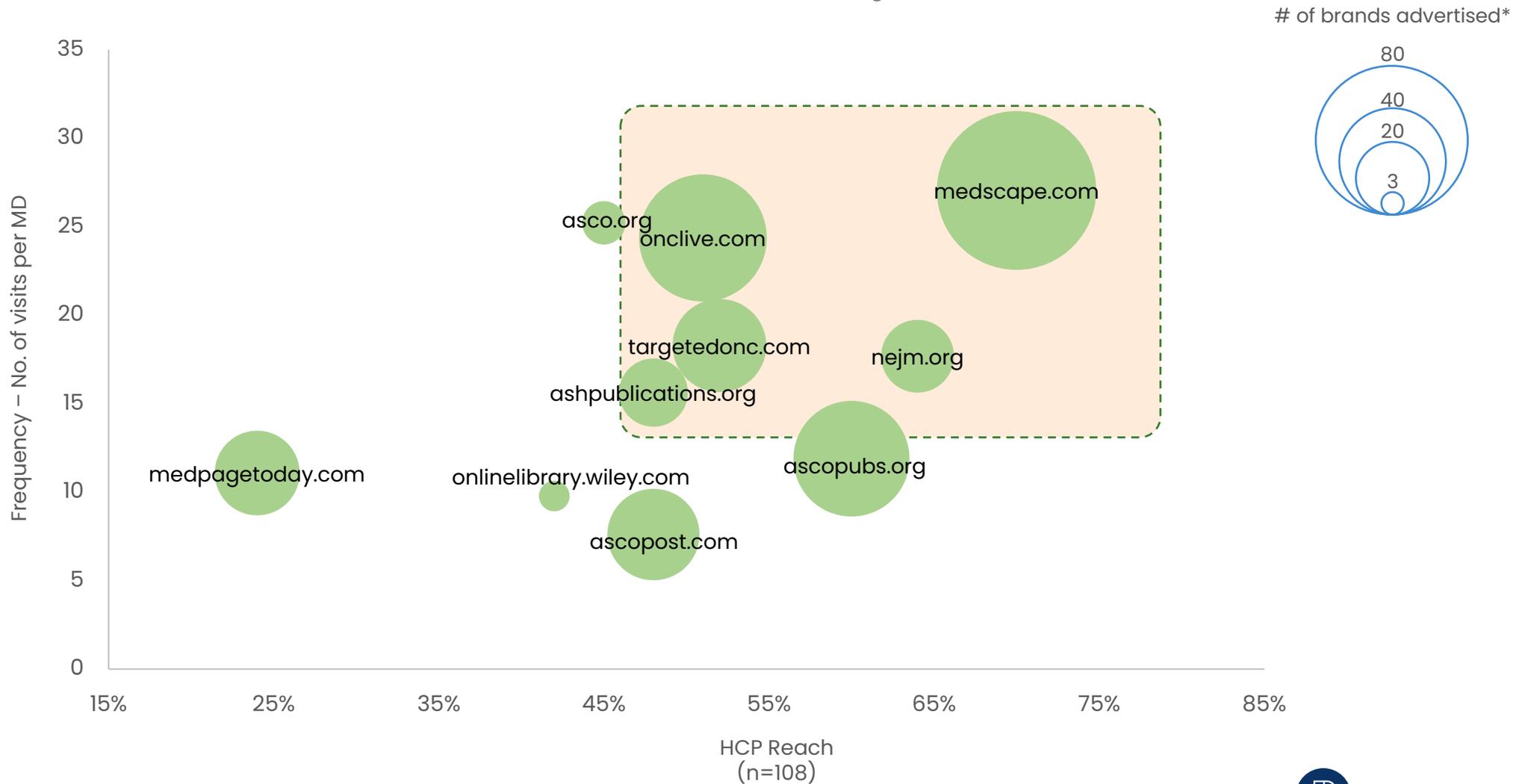
(Jan '22 – Dec '22; 40 Academic and 68 Community HCPs)



While there is comparable engagement across medscape.com and nejm.org, Medscape has far more brands competing for ad space than NEJM

Top 10 Websites hosting 3rd Party Ads

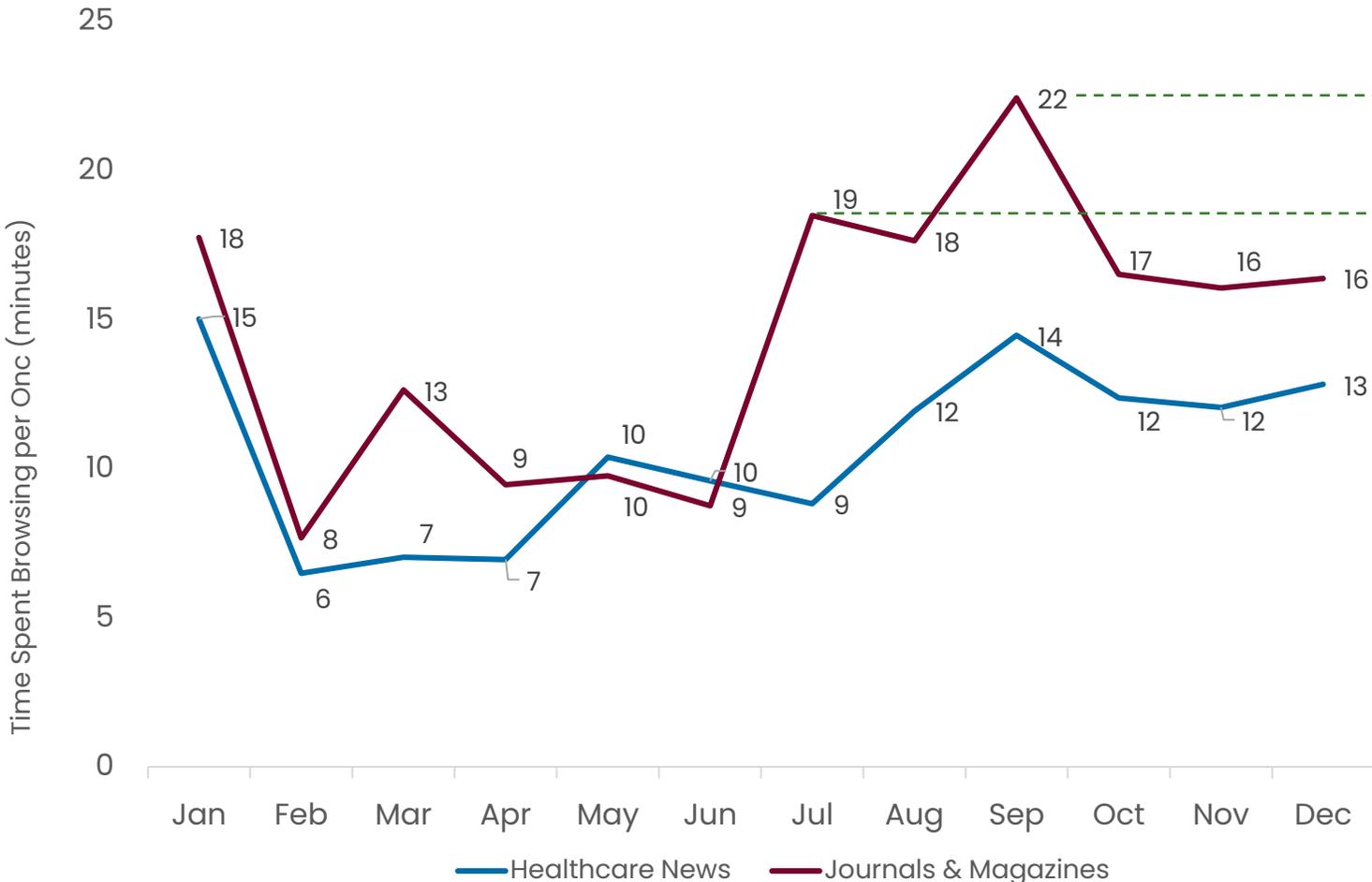
(Jan '22 – Dec '22; 411 hours of browsing from 108 HCPs)



There are large spikes in journal-related web browsing during and after key oncology conferences

Engagement per Oncologist – Journals & Magazines, Healthcare News

(Jan '22 – Dec '22; # of HCPs = 108)



24% of the time browsing journals in Sep was spent on **ESMO-related webpages** – an increase from **14%** in Aug

cdc.gov, ce.mayo.edu and **esmo.org** saw a **9x** increase in browsing time in Aug (i.e., during ESMO) compared to Sep

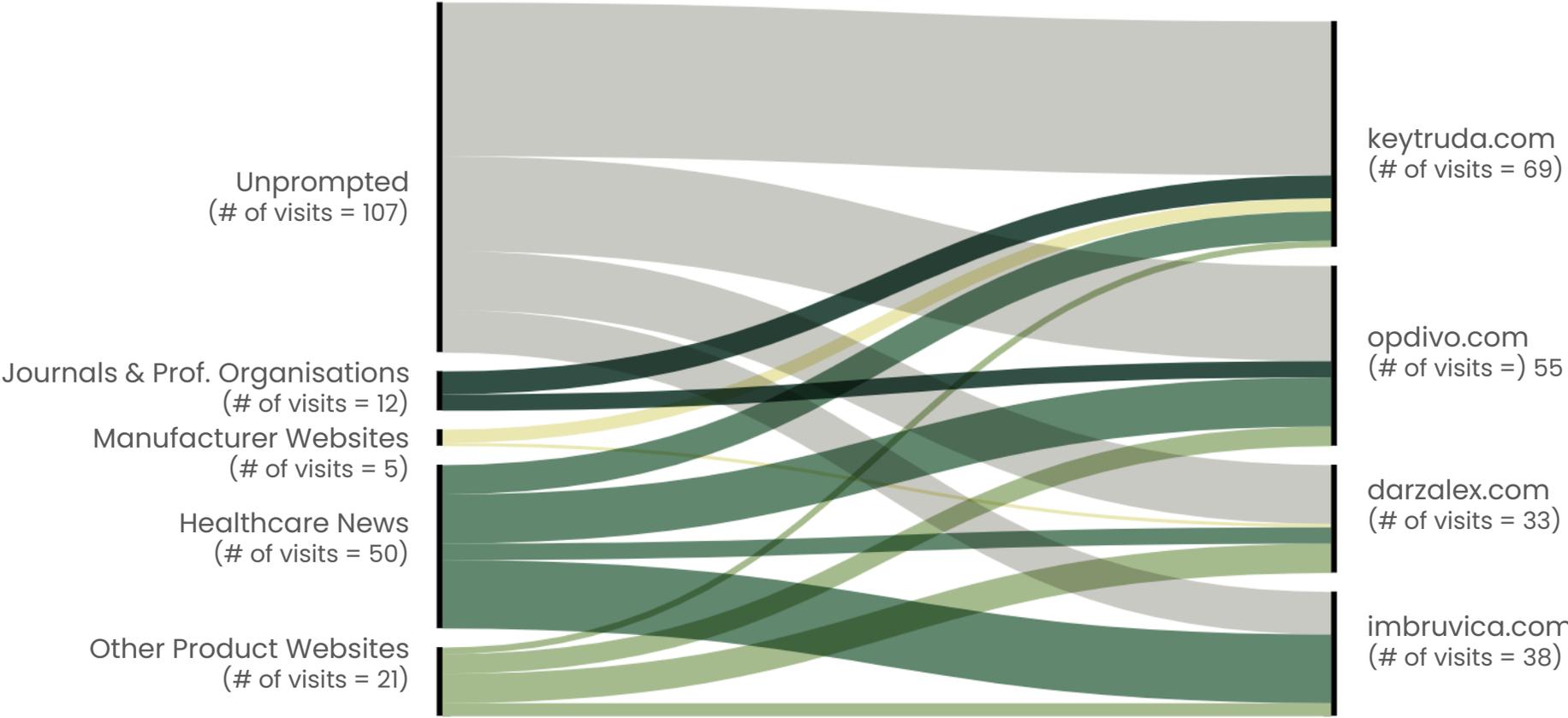
Oncologists browsed **70% more ASCO-related content** in July compared to June

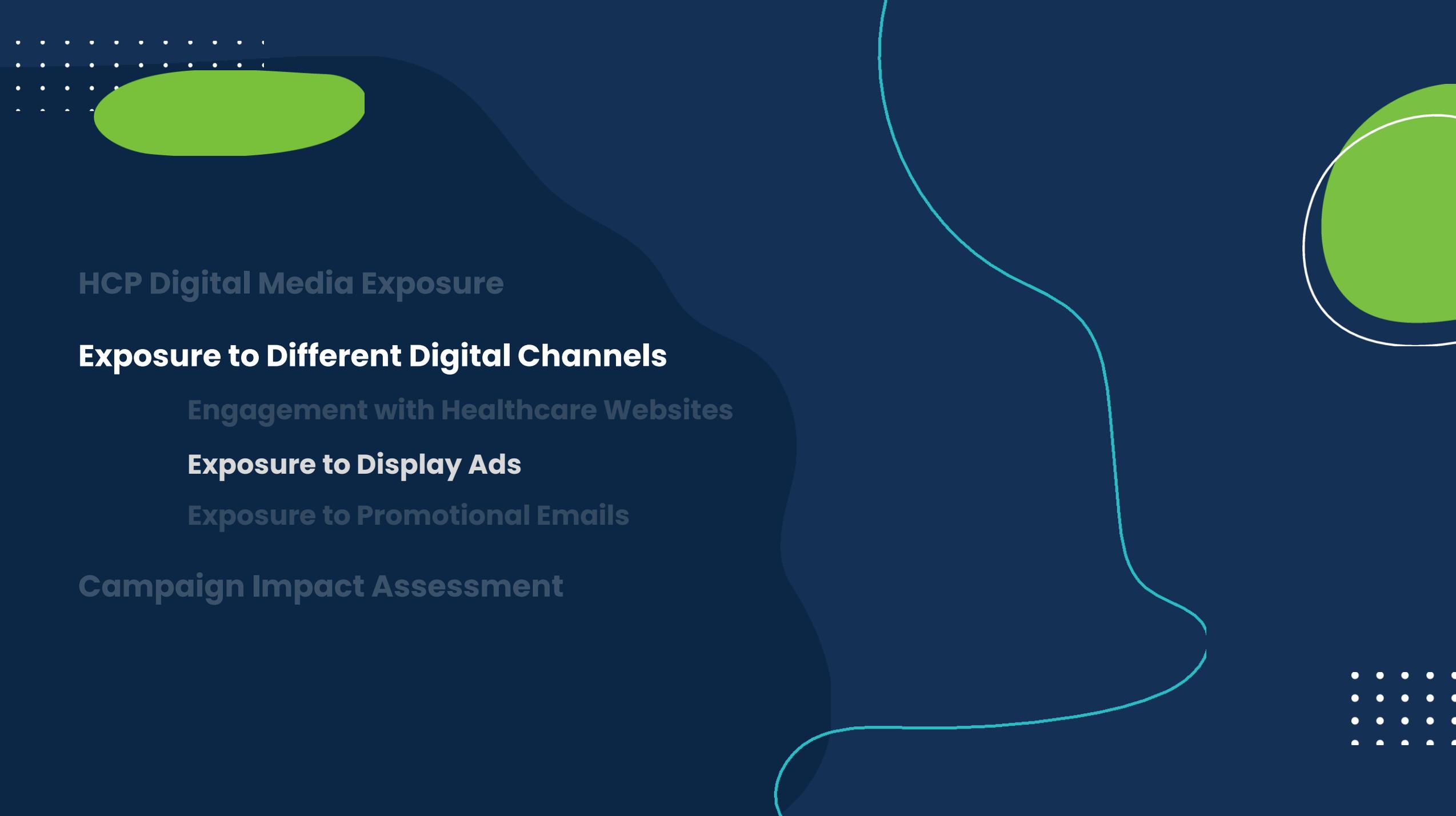
ce.mayo.edu, ascopost.com and **gotoper.com** saw a **10x** increase in browsing time during this period

Most HCPs arrive at product websites without any online prompt; however, a substantial proportion of branded website visits occur right after reading healthcare-related news articles

Source of Product Website Visits

(Jan '22 - Dec '22; # of visits = 542)





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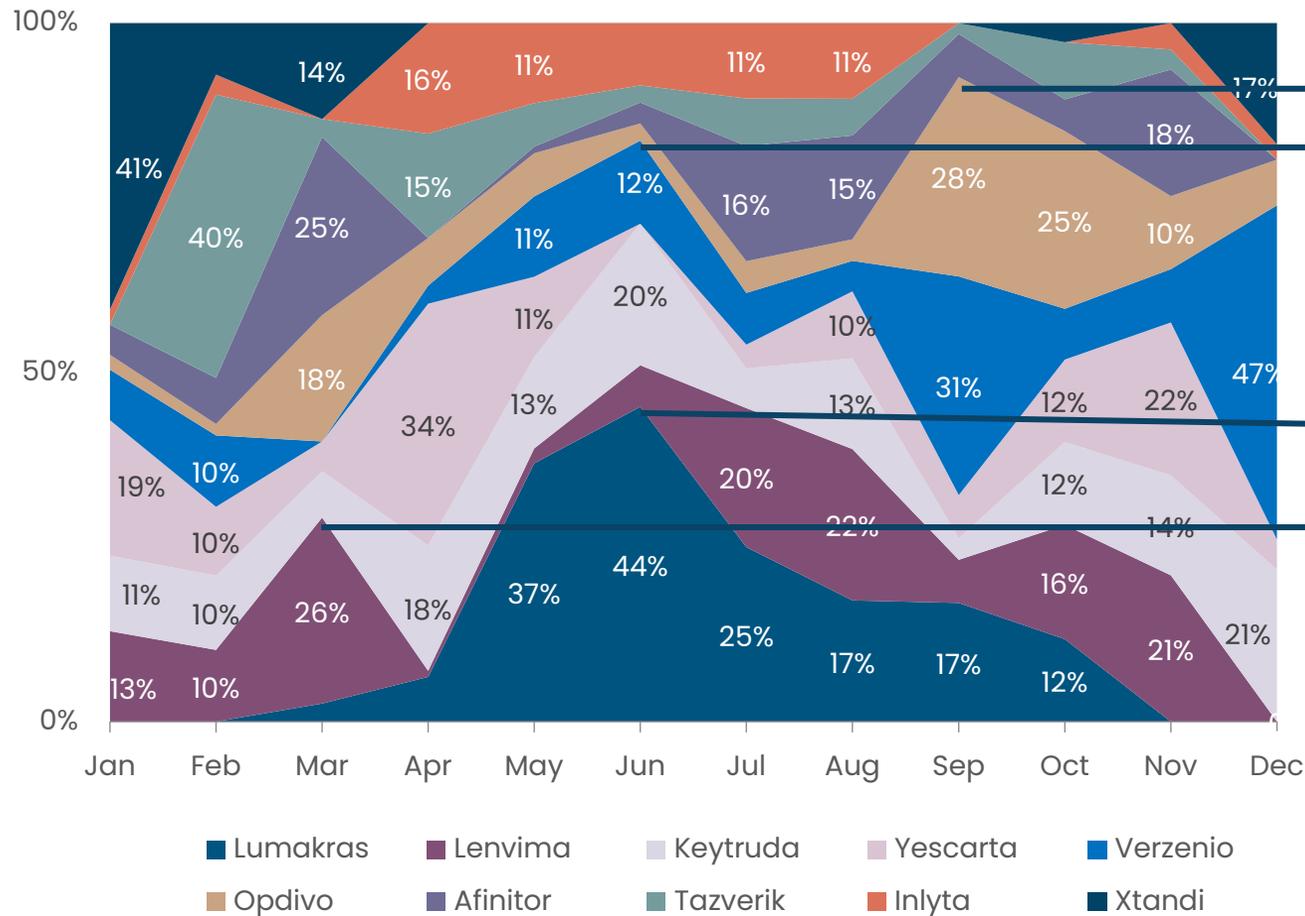
Campaign Impact Assessment



Lumakras had the greatest display ad SOV amongst oncologists in 2022; Keytruda ads were encountered consistently over the year

Share of Display Ads - Top 10 Brands

(Jan '22 - Dec '22, # of Panelists = 94)



Top Campaigns Driving Major MoM changes

(Jan '22 - Dec '22)

CABOMETYX (cabozantinib) tablets + **OPDIVO** (nivolumab) **2 ESTABLISHED TREATMENTS**

IMPORTANT SAFETY INFORMATION
WARNINGS AND PRECAUTIONS
Hemorrhage: Severe and fatal hemorrhages occurred with CABOMETYX. The incidence of Grade 3 to 5 hemorrhagic events was 5% in CABOMETYX patients in RCC, HCC, and

Verzenio
FOR HR+, HER2- POSITIVE EARLY BREAST CANCER (EBC) AT HIGH RISK OF RECURRENCE AND A Ki-67 SCORE $\leq 20\%$

LUMAKRAS
Discover the latest data from CodeBreak 100

LENVIMA is the only FDA approved TKI in combination with everolimus for 2L aRCC that targets **FGFR1-4¹**

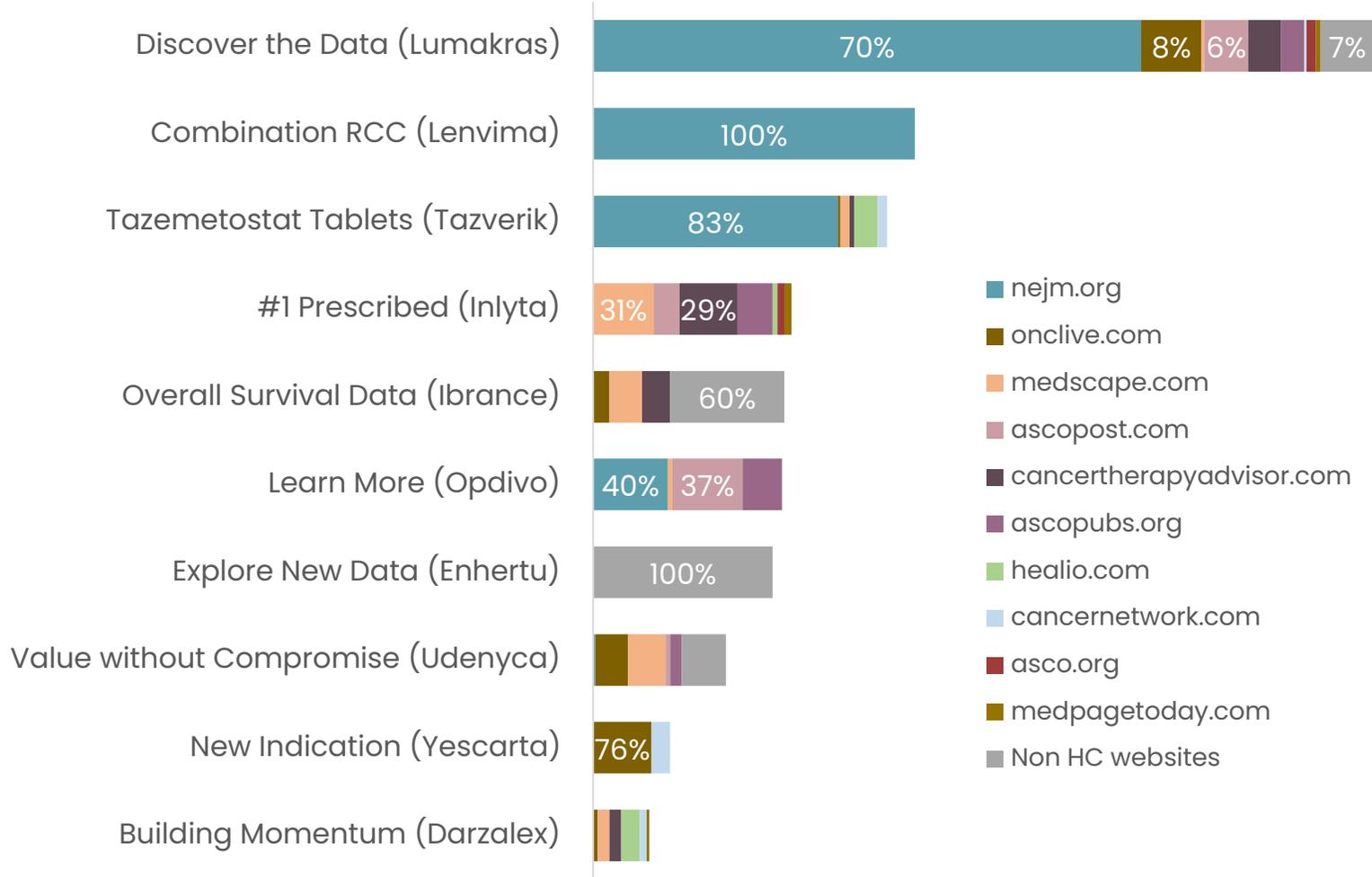
INDICATION
 LENVIMA is indicated in combination with everolimus, for the treatment of adult patients with advanced renal cell carcinoma (RCC) following one prior anti-

Three of the Top 10 campaigns were encountered primarily on nejm.org – one of the most frequently visited (and least competitive) websites when it comes to display ads

Top Campaigns

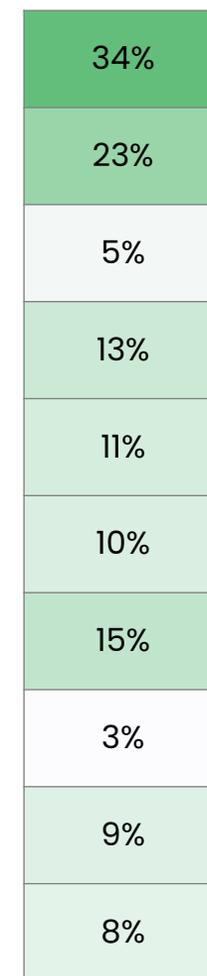


Website Placement – Top Campaigns by Impressions



Campaign Reach %

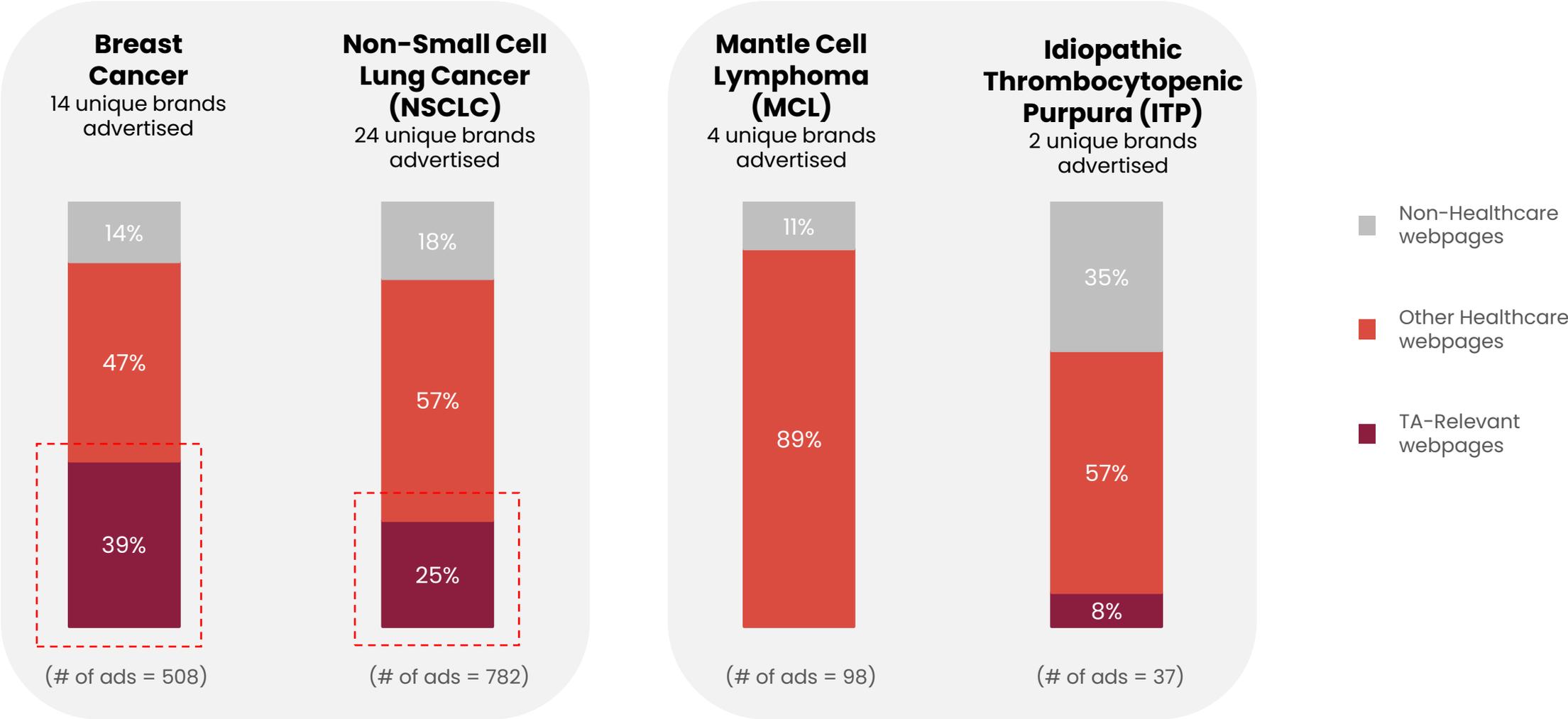
(Jan '22 – Dec '22; # of Oncologists = 94)

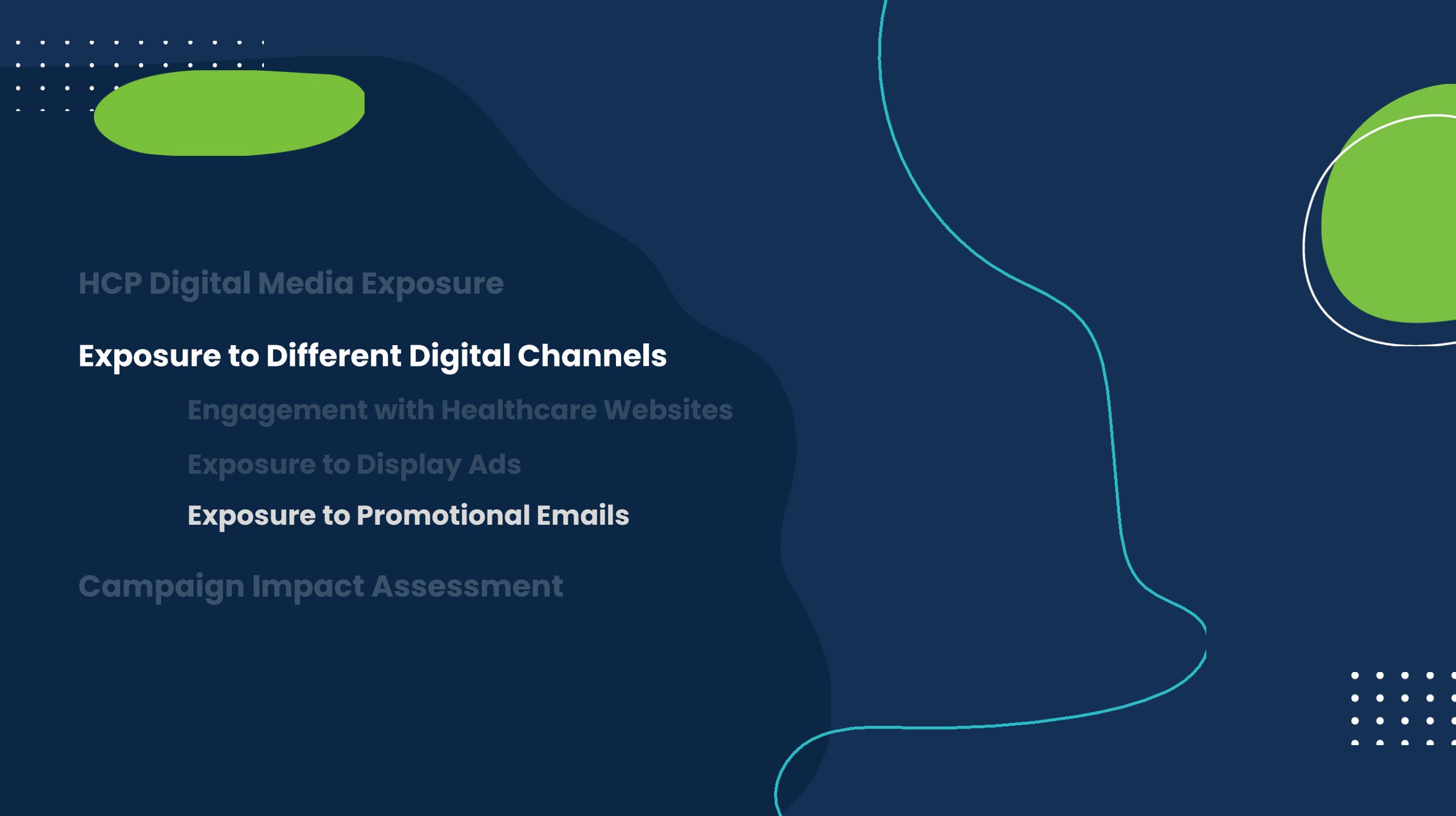


of ad impressions

MDs frequent treatment-area specific webpages for more prevalent diseases, thus encountering more targeted ads; other TAs rely on MDs encountering ads outside of TA-specific webpages

Webpages Where Display Ads Were Encountered





HCP Digital Media Exposure

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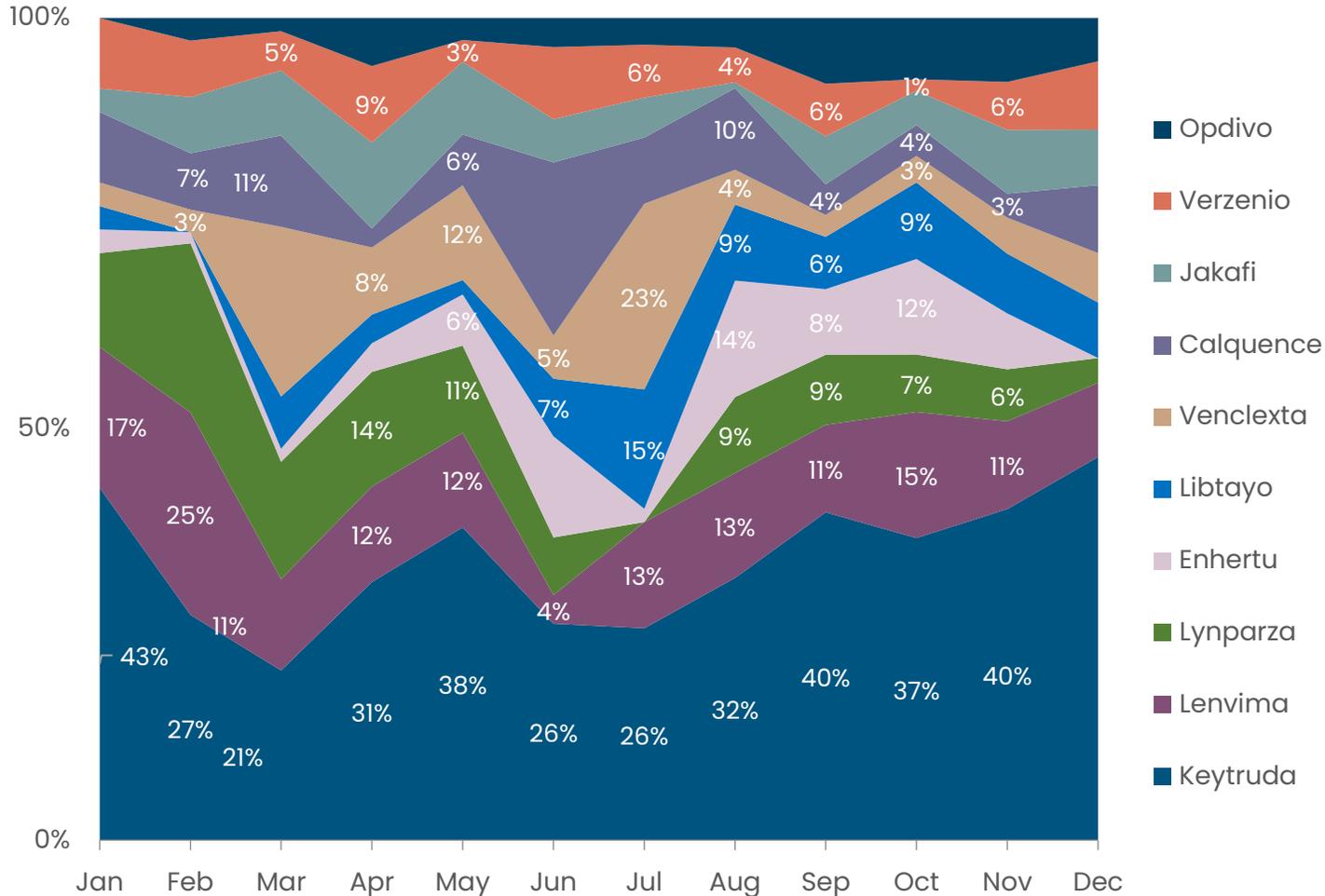
Campaign Impact Assessment



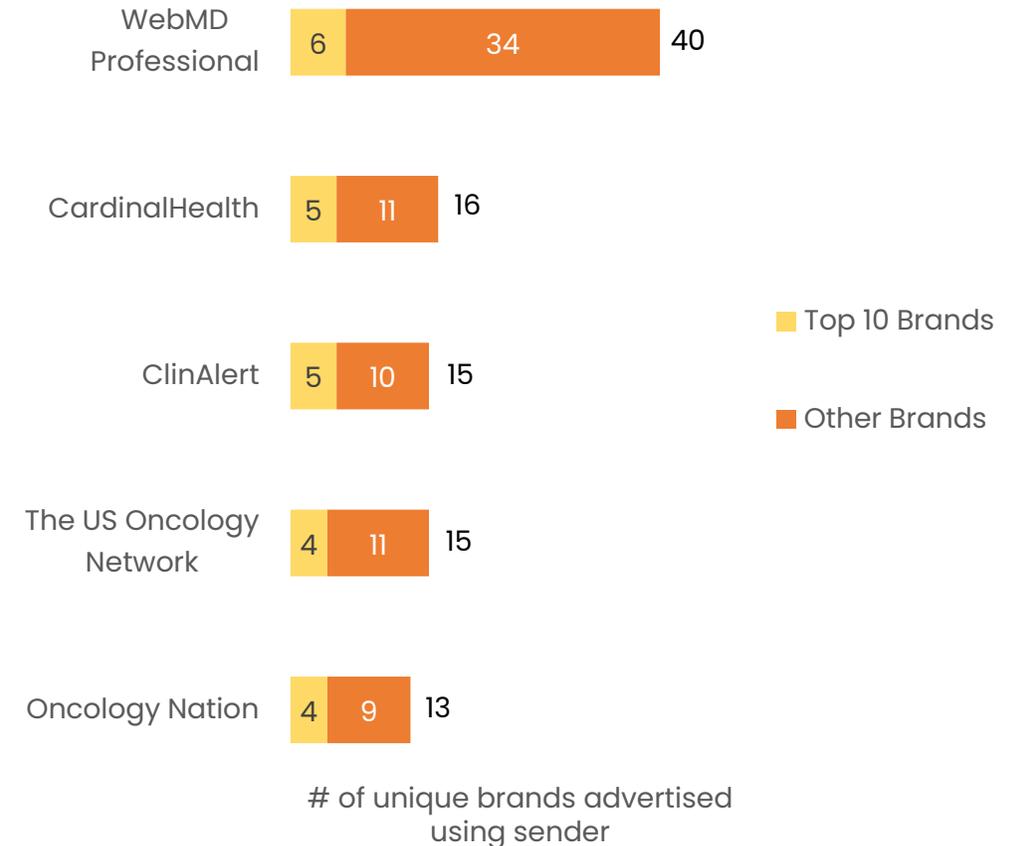
MDs encountered the most diverse paid brand promotion in newsletter emails sent from WebMD; Keytruda was the most consistently encountered brand

Paid Brand Promotion Encountered in Emails – Top 10 Brands

(Jan '22 – Dec '22; # of Emails = 1,372)



Top Third-Party Websites Sending Emails





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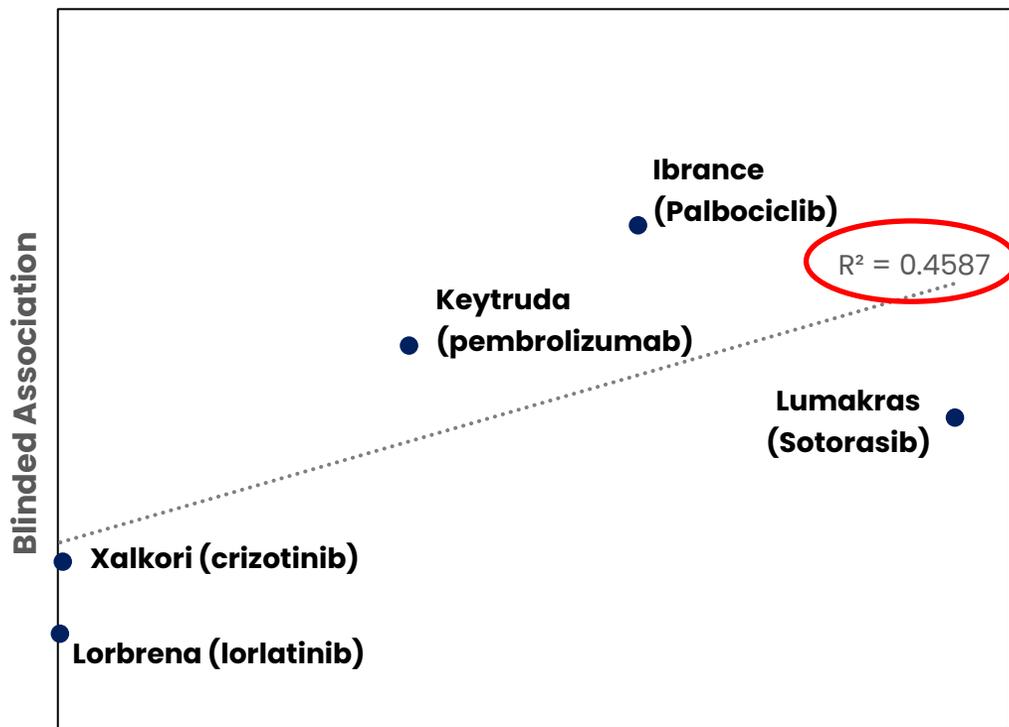


The Campaign Impact Assessment Module combines PERxCEPT digital tracking technology with primary market research to quantify the true impact and effectiveness of digital campaigns

KEY METRICS	WHAT DOES IT MEAN?
Brand's Blinded Association	Understanding how well a campaign is associated to the brand
Effectiveness Score	Learn about likelihood to attract, the relevance of the information to create an impact on HCP
Understand Campaign Effectiveness	Inform if the campaign is effective, what works vs. not. Clear actions on what needs to be changed to make it work
Actionability Score	Capture actions performed. Eg: Read about a product, Discuss with patients/colleagues, Talk to a rep etc.,
Custom Questions	Clients can also add any custom questions pertaining to digital ads, like recall etc., as brands demand

The perception of a campaign's effectiveness had no relationship to the number of impressions it received

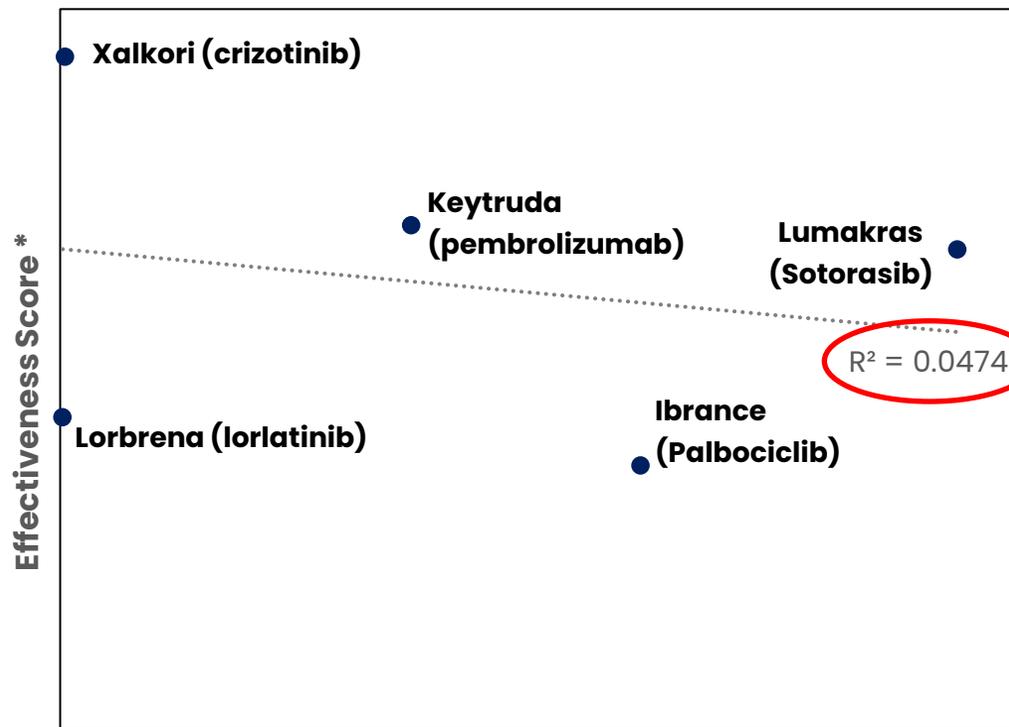
of Impressions vs Blinded Association



of Impressions

High Correlation Between Impressions and Association

of Impressions vs Effectiveness Score *



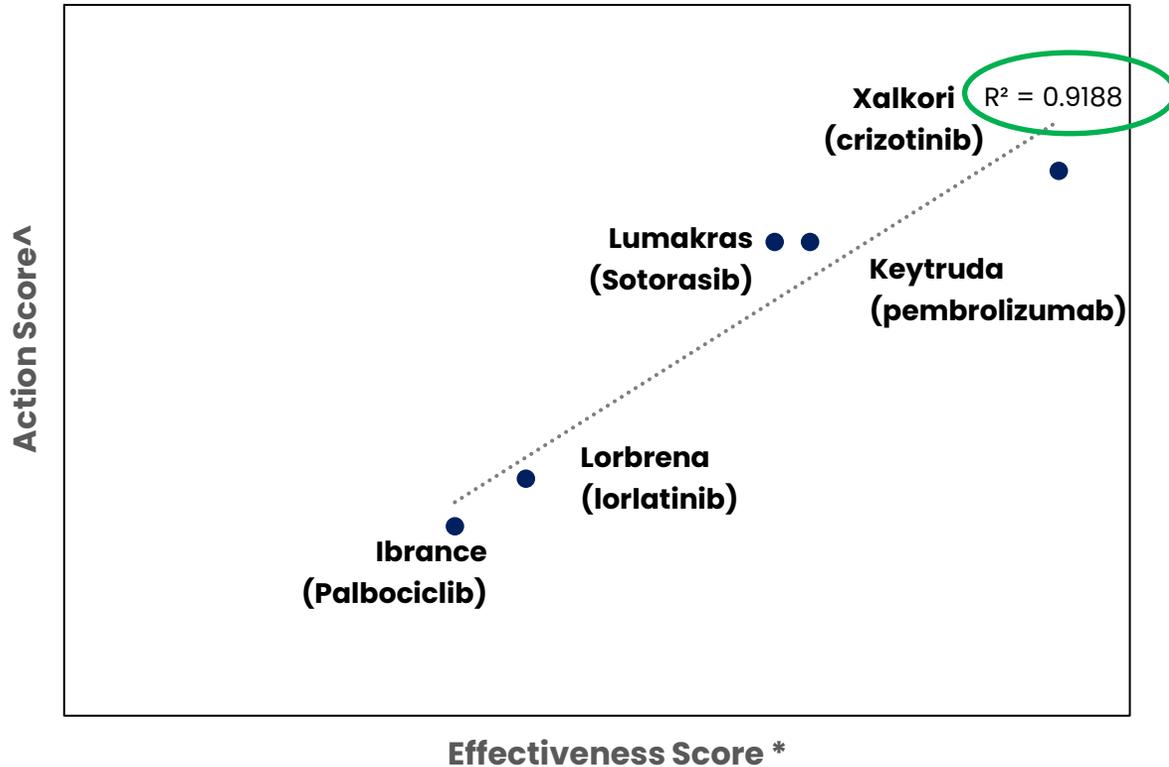
of Impressions

No Correlation Between Impressions and Effectiveness

*Effectiveness Score = Geometric mean of high likelihood of attracting attention, relevance of information and improvement in perception

However, the effectiveness of a campaign directly translates to real-world action

Effectiveness vs. Actionability



Effective campaigns drive real-world actions, including seeking more product information and discussing the product with colleagues and patients



Optimizing Campaign Effectiveness is imperative to driving real-world actions & experience

High Correlation Between Effectiveness and Action

*Effectiveness Score = Geometric mean of high likelihood of attracting attention, relevance of information and improvement in perception

^Action Score = Geometric mean of high likelihood to seek more product info, discuss product with colleagues and patients



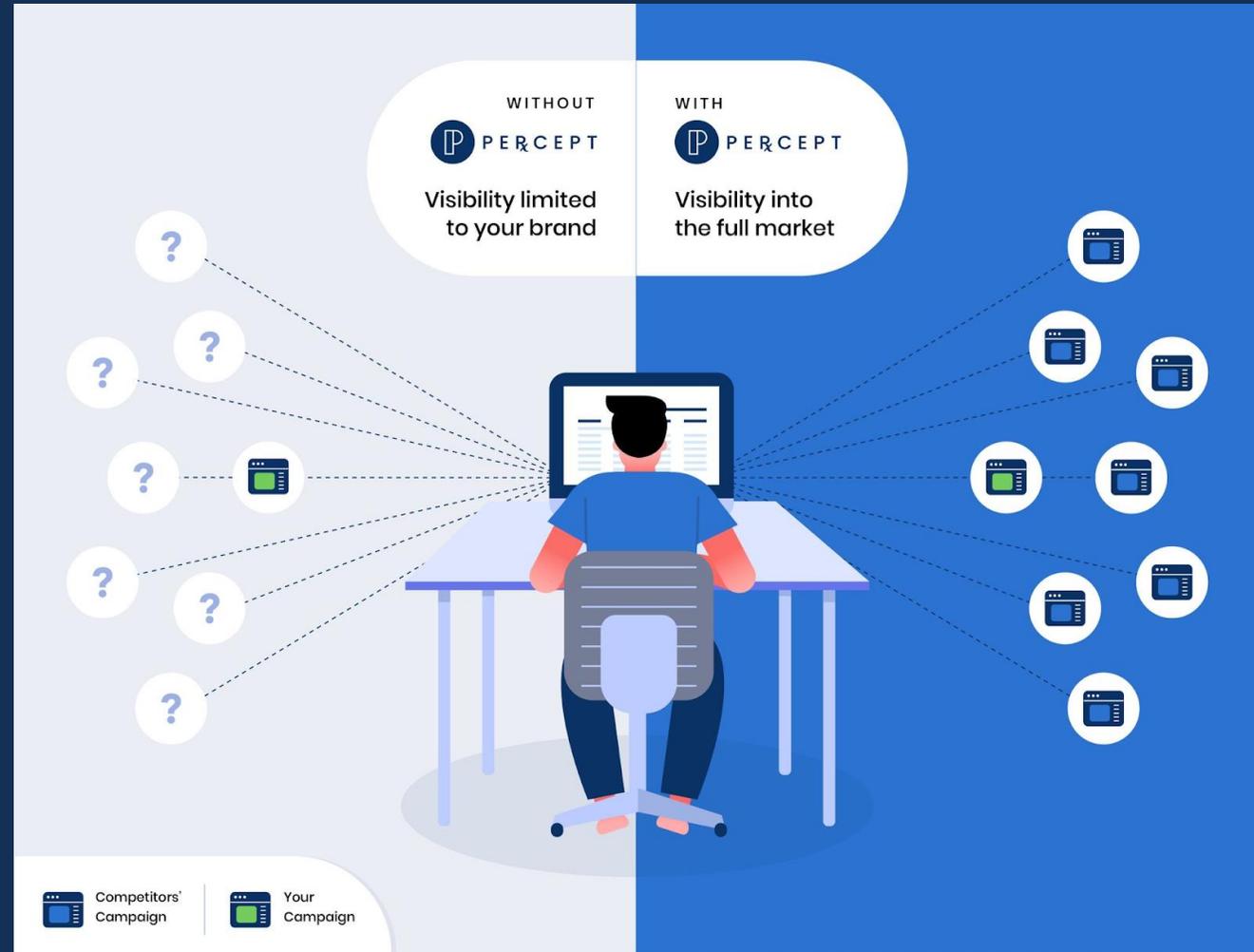
PERCEPT

A PRODUCT OF ZOOMRX

Methodology

PERxCEPT collects and catalogues every campaign, across every channel, for every brand in in an automated, AI-driven manner

PERxCEPT integrates your omnichannel performance with deep voice-of-customer insights to quantify impact



How does PERxCEPT work?

PERxCEPT = Google for Pharma + Nielsen Box



PERxCEPT goes **broad** via profile driven web-scraping

- **Google like crawling of the life sciences web**
- **Enables significantly greater breadth at scale**
- **Comprehensiveness is made possible**



PERxCEPT goes **deep** via Web Browser Extension

- **Nielsen Box approach for HCPs and Patients**
- **Fully opt-in; compensated**
- **See what your target audience sees**
- **Targeted as per your targets**



Real-time assessment of the top digital campaigns in the market

Real-Time Campaign Identification

powered by PERxCEPT



Profile-Driven Web Scraping



'Digital Nielson Box'

Campaign Collection



Ferma.AI
Campaign Classification



Most-Viewed Digital Campaigns ID'ed for a market

Campaign Impact Assessment

collected directly from target customers



Assessed within existing PET survey architecture

- Do you recall this campaign?
- What information did you take away?
- What actions did you take next?
- How clear, relevant, and motivating is the campaign?
- How would you improve this campaign?



**Want to Learn More?
Get in touch**

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