



SALES + MARKETING

# The Evolution of Point-of-Care Marketing in Pharma

By Hensley Evans and Victoria Summers



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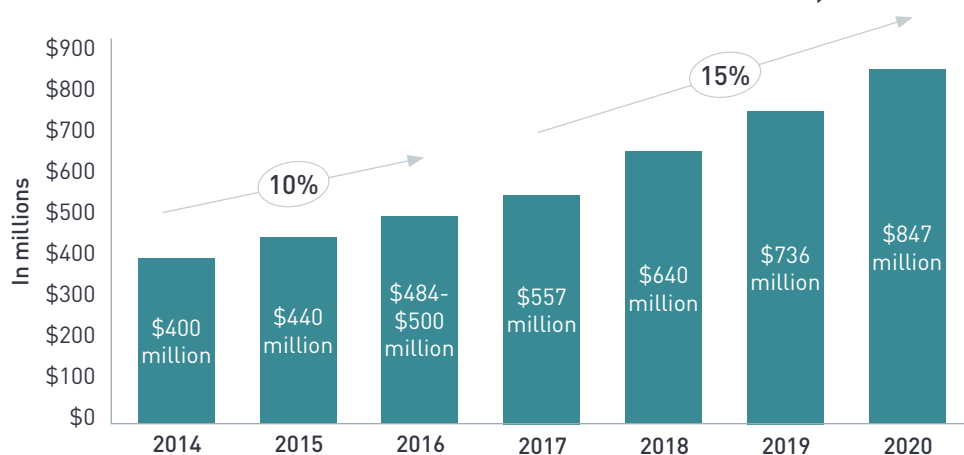


Walk into almost any physician's office today and you'll likely see posters, brochures and TV screens sharing information on pharmaceutical products. That's because waiting rooms and exam rooms remain important places to engage patients with pharmaceutical messaging. After all, patients spend a lot of time there: The Vitals 8<sup>th</sup> Annual Wait Times Report, released in March 2017, reported that average patient wait times **are about 20 minutes**. Meanwhile, a CNBC report on patient wait times, published in April 2016, found that 85% of patients **wait 10 to 30 minutes** past their scheduled appointment time to see their doctor.

However, the environment in which these patients are waiting has changed significantly. Offices that were struggling to implement electronic health records in 2014 to comply with the meaningful use deadline have now found their footing. Many offices have redecorated their waiting areas and settled into a new workflow—one that engages digital media at nearly every step. This move to a more digitally connected physician's office has been reflected in the point-of-care (POC) marketing options available. While healthcare offices still have posters and wallboards, the majority of POC marketing now takes place digitally. While printed materials are still important, digital options have evolved, offering a dynamic multimedia environment where a patient can watch medication adherence videos on an exam room wallboard, sign up for a patient support program on an in-office iPad, request information via a digital tablet at check-in, or learn about a vaccine from a TV commercial in the waiting room. As a result, POC vendors are developing more digital solutions to engage and educate patients.

In 2017, we fielded an update to our 2014 ZS Study on the Point-of-Care Consumer Market. We held interviews with brand marketers, industry vendors and media buying agencies, and led a review of media data sources. In our 2014 study, we estimated that POC marketing would make up approximately 10% of the pharma industry's total direct-to-consumer (DTC) spending and would grow at a compound annual growth rate (CAGR) of 10% (see figure 1) from 2014 to 2016. Findings from our 2017 analysis confirm that the market grew as we expected. Looking forward, we expect the growth rate to accelerate to a CAGR of 15% through 2020.

#### POC INVESTMENTS: A LOOK AT ACTUAL AND PROJECTED SPENDING, 2014-2020



The numbers from 2017 to 2020 are projected numbers.

Figure 1: Point-of-care marketing in pharma has made up about 10% of direct-to-consumer messaging through 2016, but it's poised for accelerated growth. We expect a compound annual growth rate of 15% through 2020.





The new digital solutions not only offer brands more ways to engage with patients, but also extend the reach and impact of the brand's digital assets.

There are five main factors that are driving this rapid growth:

- 1. The changing players in POC marketing:** In the past 18 months, the industry has seen a flurry of M&A activity that has reshaped the market and created a new dynamic in the point-of-care industry. Starting in June 2016 with **AccentHealth's acquisition of PageScience**, POC companies have sought opportunities to expand their offering and their network reach through acquisition. In 2016, **ContextMedia acquired AccentHealth**, merging two of the largest players in the POC digital and in-office TV space. This enhanced the reach of ContextMedia, which shortly thereafter changed its name to Outcome Health. In May 2017, Mesmerize Marketing acquired Elite Sampling & Media Group's national network of wallboards in doctors' offices, making Mesmerize the largest provider of static media in high-prescribing physicians' offices.
- 2. Expanding access to POC messaging:** In 2017, POC companies sought investment to help fund network expansion to increase their reach into doctors' offices. In May 2017, Outcome Health raised \$500 million to help meet its goal of expanding into 70% of all physicians' offices in the U.S. by 2020. In June 2017, PatientPoint raised \$140 million to accomplish **the same goal by 2019**.

This effort expands on the work that POC companies have been doing to extend their reach. In 2014, the leading vendors **offered access to approximately 24,000 physicians' offices**. In 2016, that number jumped to 40,000 offices, according to figures from both **PatientPoint** and **Outcome Health**. With PatientPoint, Outcome Health and other vendors intending to increase their coverage to more than 140,000 physicians' offices by the end of the decade, the opportunity **to reach patients in offices and outpatient centers** will increase significantly. This expanded access—nearly triple the current available POC network coverage—is expected to drive the growth curve for the POC industry.

## GROWTH OF POC SOLUTIONS AT PHYSICIAN OFFICES AND OUTPATIENT CENTERS

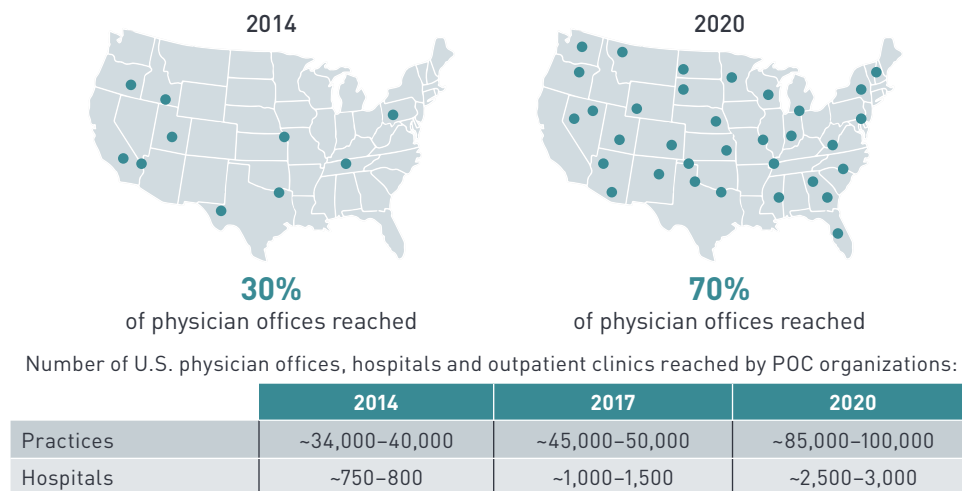


Figure 2: Expected growth of POC solutions at physician's offices and outpatient centers more than doubles from 2014 to 2020.

**3. New digital POC solutions:** The investment to rapidly expand the POC footprint in U.S. physicians' offices is being fueled by pharma's continued interest in the POC channel. According to the *Medical Marketing & Media* Healthcare Marketers 2017 Trend Report, **36% of pharma brand marketers expect to increase their POC marketing spending** in the coming year. Part of this increase may be due to the new digital channels available in offices, such as interactive exam room tablets, touchscreen wallboards, check-in tablets and sponsored Wi-Fi connections. The new digital solutions not only offer brands more ways to engage with patients, but also extend the reach and impact of the brand's digital assets. Depending on the access provided by the program, patients can access brand websites, method of administration videos, safety information, patient testimonials and other materials online from the physician's office, often right in the exam room. Many companies offer digital content pre-loaded on mobile devices to help educate and inform patients.

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### NEW POC DIGITAL OFFERINGS

Ten to 20% of the brands ZS spoke to reported moving dollars from digital media to digital POC in doctor's offices and hospitals.



Exam Room  
Tablets



Exam Room Interactive  
Wallboards



Sponsored Apps  
and Wi-Fi



Waiting Room  
Digital TV

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*Figure 3: Digital point-of-care options, including digital TV messaging in the waiting room and interactive wallboards in exam rooms, are poised to overtake pharma companies' investments in digital display advertising.*

The introduction of these digital solutions has enabled companies like Outcome Health to experience tremendous growth. The company more than quadrupled its business in recent years with the rollout of new offerings like the exam room tablet and interactive wallboards with 3-D anatomical models. "Leveraging technology during the moment of care to inform and empower patients in the minutes before, during and after their consultation has a measurable impact on the patient/doctor discussion as well as treatment adoption," Nancy Phelan, Outcome's senior vice president of commercial growth, told us via email.

PatientPoint recently announced a partnership with Reflect Media, a digital sign company. This signals the continued expansion of digital interaction in the POC channel. Mike Collette, PatientPoint's founder and CEO, told us, "With this new Reflect partnership, we feel confident that we will propel innovation into the market at an unrivaled speed."

**4. Shifting dollars from display to POC:** Interviews with brand marketers, POC vendors and media buying agencies indicate that some of the growth in these new digital POC channels may be coming at the expense of digital display banner advertising (see figure 3). There are several reasons that brand marketers are attracted to digital POC over digital display. “Instead of digital display look-alike targeting, digital POC is targeted at specific patient groups within a care setting. This gives it an obvious advantage over standard digital display,” Charlie Greenberg, a respected healthcare industry veteran, told us in an interview. Reaching patients in the exam room via digital POC efforts also provides a greater opportunity to impact patients at the point of choosing a treatment or prescription drug.

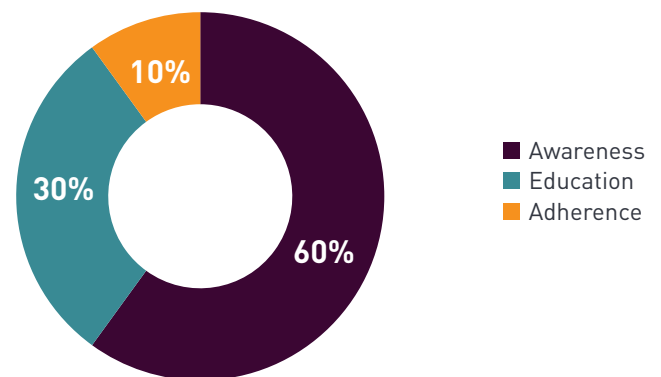
In recent years, concern about display ads’ viewability and lackluster pull-through have caused brand marketers to take a hard look at the way that they spend their digital dollars. Five years ago, POC was dominated by print and in-office TV. Now, POC offers a growing variety of digital channels, allowing marketers to make trade-offs between POC mobile and display media campaigns. In addition, many POC programs offer exclusivity within a category at the physician’s office. Brands can feel secure that their messages will appear in the appropriate setting and not before or after a competitor’s message.

While launch brands still focus the bulk of their investment on TV, print and digital display, brands tend to shift dollars from other channels to POC as they mature in an effort to connect with patients.

**5. Evolving POC strategy:** In the past, point-of-care marketing was focused on building awareness. However, the brands we spoke with cited emerging trends in using POC channels for patient education and adherence or support program registration (see figure 4).

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#### STRATEGIC ROLE OF POC



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*Figure 4: While the main strategic objective behind POC marketing is to build awareness, brands are using the channel to promote patient education and treatment adherence.*

## A Few Challenges for POC

While the POC industry is poised for rapid growth, two challenges could impact the growth rate.

### *Accurate Measurement and Attribution*

Given the recent press regarding [the data inflation allegations against Outcome Health](#), it's clear that clean, robust and third-party-validated measurement in the performance of point-of-care is critical to understanding the impact of brand investment. The brand marketers and media buyers in our study consistently expressed their concern about how best to measure the impact and return on investment of POC campaigns. While it makes intuitive sense that the channel has a positive impact on awareness and patient preference, it's often challenging to measure the effect of POC messages.

Practices targeted with POC messages usually are also the same offices targeted by the field force and other marketing efforts. This can make teasing apart the impact of POC from all other forms of promotion difficult. POC marketing has enjoyed a similar benefit as Google AdWords. Since POC marketing messages are often the “last mile” before a patient sees a physician, without a true test and control measurement methodology, the lift in prescriptions can be over-attributed to POC marketing. This over-attribution provides brands with results that are so high that brands sometimes question their validity.

Advanced multichannel attribution modeling, a statistical analysis used to determine the impact of various marketing channels, can help but is implemented sporadically. Part of the challenge is the completeness of the data coming from the point-of-care market. Data is provided in a variety of ways and at different levels of granularity, making it difficult to find a standard unit upon which to measure patient impressions. The variety of solutions also works against the industry when trying to standardize measurement. The data coming in from digital engagement is different than impression data from the in-office television programming. Offline tactics like educational posters and in-office brochures add to the complexity.

To alleviate this, POC companies are partnering with real-world evidence data vendors such as IMS and Symphony Health to evaluate their programs. Implementing test and control groups at the start of the campaign have helped some companies measure the effect of POC efforts. IMS studies on SMI Health Media programs have shown that [point-of-care marketing can generate as much as a 5 to 1 ROI](#). In addition, the industry trade group, The Point of Care Communications Council, is finalizing a standardized “best practices in auditing” document, which will support post analysis of the programs.

The effect of POC messages on patients has been studied at a high level by the industry. The [Kantar Media 2015/2016 MARS Consumer Health Study](#), commissioned by The Point of Care Communication Council, noted the continued high level of patient-reported impact from POC messaging. In the study, 68% of patients asked for a brand that they had been exposed to in POC marketing, and 65% indicated that they were more likely to switch brands after seeing POC messages. The study went on to show impact beyond the office, too. After seeing healthcare advertising at the point of care, 31% of patients were more likely to fill the prescription and 34% were more likely to take the medication as prescribed (see figure 5).



## THE IMPACT OF POC

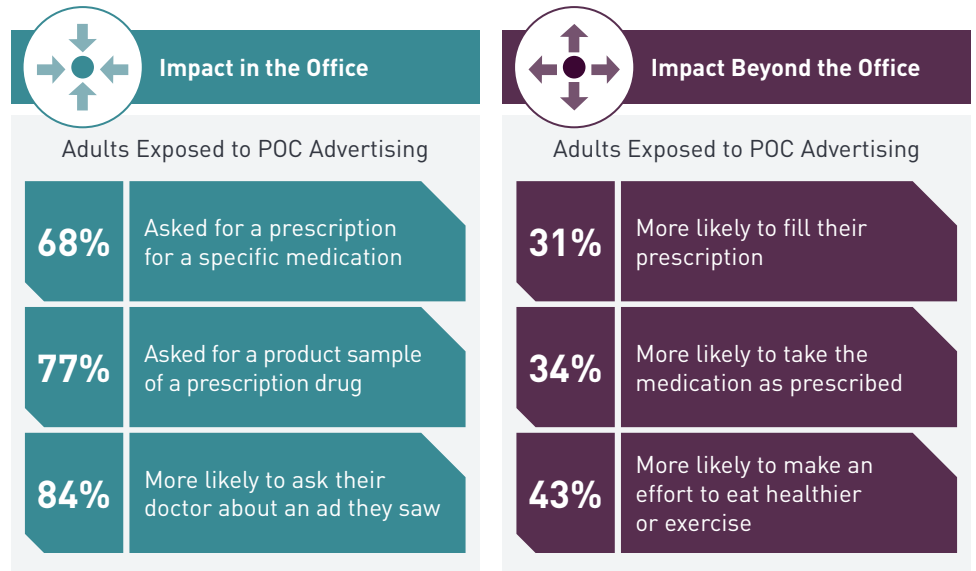


Figure 5: By partnering with data vendors, point-of-care vendors have been able to share metrics that help pharma companies understand the return on investment of their POC efforts.

### Advertising Message Relevance

Another challenge facing the industry is around the relevance of the marketing messages placed on the channel. Marketing messages created for a different channel, such as a digital display ad, often is used in a POC channel. This practice saves brands time and money in development costs but has the potential to undercut the effectiveness of the message as POC offerings are targeted to specific places in the office and outpatient centers.

“It is no longer enough to take your print ad or banner ad and place it in POC media,” Greenberg told us in an interview. “Brands need to think about the context of the office and determine if existing creative does the job or if copy needs to be refocused to the environment. Investing in added development could pay out in generating greater promotional effectiveness of the campaign.”

As POC expands beyond the waiting room—into the exam room, infusion center, lab waiting areas, etc.—the messages being created need to be more closely aligned with the context to be most effective. Content created for a YouTube channel and targeted at patients considering treatment or prior to diagnosis likely isn’t as relevant for a patient during an infusion. Brands will need to better understand the decisions that patients are making at each point within their physical and emotional journeys to develop content that’s impactful and cultivates a connection.

Knowing what patients need to understand or the decisions they make at each point during the visit will help create content that supports and informs those decisions.

## How to Succeed in POC

There's a wealth of opportunity in the POC marketing space. The increase in scale with an expansion of physicians' offices reached, increase in scope through new interactive signage and products, and increase in strategy by using POC to engage patients in adherence and support programs provide brands with more ways to impact patient decisions. There are two things that brands should be doing to prepare for success in POC:

1. **Set the foundation for developing contextual content.** Content customized for the location, situation and specific needs of the patient and caregiver will become increasingly important. To set a solid foundation for effective and efficient content development, brands and their creative agencies should have a solid understanding of the following:
  - + **Patient journey:** The patient journey is established as a tool for empathy as patients move through multiple phases, from awareness of their conditions to the options for treatment. However, most patient journey work focuses heavily on the emotional elements of the journey vs. the educational and informational needs. Patient journeys also tend to end once a patient is on therapy. The patient's continued experience isn't always included. For the POC message development, however, it's important to understand the stages in the patient's care beyond the first prescription and to capture more than the emotional factors at play.
  - + **Patient flow maps:** Since the point-of-care marketing options are aligned to the physical space of the physician's office or outpatient center, it's critical to understand how patients move through these spaces. Patient flow maps can track the steps that patients go through when they visit an office or an outpatient center and pinpoint moments where POC messages can provide impact. Knowing what patients need to understand or the decisions they make at each point during the visit will help create content that supports and informs those decisions.
  - + **Experience design:** By focusing on improving the patient experience, brands can uncover ways to differentiate themselves and provide value when patients are discussing care options with their physicians. Experience design looks at the entire process from the patient's point of view with the intention of improving the experience. From making it easier, faster, more comfortable or of higher quality, POC interventions can be used to create better point-of-care experiences. Educational videos, patient testimonials, iPad registration for patient support programs, and "how to" demonstrations for administering medicine are just a few examples of value-added POC content that's designed with the patient's needs in mind.
  - + **Barrier and impact analysis:** Often, patients experience barriers and challenges as they go through their physician or outpatient visit. Knowing what these barriers are is half the challenge. The other half is to determine which barriers can be impacted. Some challenges can be addressed by a brand, and some are critical to a patient's success on a therapy.


For example, pharma companies can make registration for support programs easier by providing a shorter in-office enrollment form, since patients may not have time to fill out a longer form.

**2. Make plans for measuring impact.** Understanding the specific impact of POC messaging on patients can be challenging. It isn't easy to know which marketing and sales effort is contributing the most to the overall brand success. Pharma companies can take a few steps to help establish an effective measurement program:

- + **Set up test and control groups.** Having a control group is challenging because it means not targeting a practice that you normally would. Yet, to have the most accurate measurement of the POC program, it's necessary to hold out a group of target practices to get an accurate measure of impact. In the planning process, identify targets to hold back from POC efforts and include them in the analytics models to create scientifically sound measurement. This is a useful step when other tactics are being targeted toward those offices (field force calls and physician emails) and the consumers (DTC TV and print ads). To more accurately determine POC impact, pharma companies should compare the results of offices with POC marketing to similar offices without it.
- + **Build marketing mix models.** Partnering with the advanced analytics team to create marketing mix models will help brands understand not only how well the POC messaging is working, but also what effect POC has on the impact of other channels, and vice versa. This step could determine if having POC marketing in place makes the DTC TV campaign more effective, or whether it's driving search activity. Knowing how the channels work together helps determine how to align investment in each channel to create optimal impact.

## Primed for Exponential Growth

As the industry invests in explosive network expansion, the POC market is expected to expand into new therapeutic areas such as oncology and immunology, bringing brands more precise ways to target patients in a variety of disease states. New digital technologies will enable the industry to engage with patients in different ways, providing richer experiences for patients and physicians to learn about treatments and programs. The continued investment in R&D will allow POC companies to meet the needs of an increasingly mobile population, one that's redefining the point of care from office-based to mobile-based, creating opportunities for engagement at each point along the patient journey.

For brands, this means a new opportunity to engage with patients in the care setting, and the opportunity to create meaningful impact by providing information, education and brand experiences within the context of the healthcare practice. For patients, this means a wider array of information and the ability to turn each visit to the physician into a contextually relevant health education experience. 

# Moving From Office-Based to Mobile-Based POC Marketing


Two emerging trends are set not only to impact the way that patients engage with information in the healthcare setting, but also to expand the definition of point of care to “wherever a patient may be.”

The first trend is a growth of proximity marketing in healthcare. Proximity marketing is the practice of distributing wireless advertising content associated with a particular place, usually through the use of beacons. Beacons are small, Bluetooth-enabled devices placed in offices and retail settings that broadcast radio signals that activate messages to appear on smartphones. While these devices have typically required patients to download a beacon-enabled mobile application, this is no longer necessary. Beacons can work with geo-targeting technology to more finely tune geo-targeted ads. This makes it possible for beacons to trigger digital display ads to appear when patients are in a particular setting.

This technology, while new, is growing quickly. ABI Research estimates the **CAGR for the beacon market to be 133% from 2016 to 2021**. *Business Insider* reports that 85% of the top 100 retailers already have beacons installed and forecasts that **3.5 million beacons will be installed** in U.S. retail spaces by 2018. As this technology becomes more prevalent in the retail space, it will establish patterns of behavior and expectations that patients will carry with them into the physician’s office. It’s estimated that \$44 billion in retail sales **will come through beacons in 2017**.

Retail pharmacies are already gearing up for this new messaging capability. In January 2016, Rite Aid partnered with inMarket **to place beacons in 4,500 locations**. In June 2016, proximity marketing platform Gimbal partnered with Health Media Network **to activate beacon programs** at all of Health Media Network’s digital displays at the 12,000-plus medical centers. The technology also is being integrated into point-of-care marketing. **Mesmerize Marketing’s acquisition of Elite** gave the company additional wallboards—now 12,000—and it intends to include Wi-Fi, geofencing and near-field communication beacons in these wallboards.

The opportunities to leverage beacons to target patients with personalized, contextually relevant messages soon will be available to pharmaceutical brands nationwide. Part of the power of beacons is that they can connect with patients in a more contextually relevant way. Instead of one message for all



practices in a network, brands will be able to tailor messages to patients based on where they are in the practice. Beacon's localized aspect gives brands more flexibility in the content and is expected to drive greater message customization. Understanding patient flow experiences in the office also will increase as brands seek to better understand patients' needs as they move through the clinics and medical centers.

Another trend affecting POC marketing is the continued increase in telehealth that helps patients stay out of the physician's office or medical center. According to a 2017 study by Frost & Sullivan, the U.S. telehealth market **will grow at a CAGR of 29.3%** from 2016 to 2021. The Healthcare Information and Management Systems Society reports that **71% of U.S. physicians' offices use telehealth or telemedicine** tools. More than **15 million Americans received some kind of medical care remotely** in 2015, according to the American Telemedicine Association, which expects those numbers to continue to grow.

In addition to seeking more convenient, shorter wait times through telemedicine, consumers also are increasing their use of retail clinics and urgent care centers. While the number of clinics has remained constant since 2015 at 2,000, **the number of visits is increasing**. In 2016, total U.S. retail clinic sales have been **estimated at more than \$1.4 billion**, an increase of 20.3% per year from \$518 million in 2010, according to Kalorama Information's study, "Retail Clinics 2017: The Game-Changer in Healthcare." Through 2020, sales are expected to continue expanding. Most of the 10.5 million patients who used retail clinics in 2016 **cited convenience as the reason that they chose the clinic**, and 56% percent of these patients chose retail clinics specifically for the walk-in appointments, according to the Robert Wood Johnson Foundation study, "Building a Culture of Health: The Value Proposition of Retail Clinics."

It's worth noting that the majority of the retail clinic visits (58%) are new utilization and not used as a substitution for primary care visits or ER visits, according to the Robert Wood Johnson study. If the network expansion by POC vendors extends to retail clinics, then the industry could see an increase in the total patient population reached by POC messages.



## About the Authors



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## About ZS

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