Proving the Point: The Effectiveness of POC

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Assess POC messaging effectiveness across disease states

Objectives

- **Capture** quantitative metrics on the effectiveness of POC messaging in the DTC channel mix across therapy areas and diseases
- **Assess** qualitative impact POC messaging has on patients and physicians to inform quantitative attitudinal study (to come in 2025)

Methodology

Campaign Focus:

- Analysis of **~90 different marketing impact analyses across 5 therapy areas**

Physician Focus:

- **Interviewed 15 physicians** with POC messaging in their offices across 4 therapy areas

Patient Focus:

- Conducted a **15-patient focus group** exposed to POC messages in 4 disease areas

POC Improves Campaign Effectiveness

Therapy Area	Without POC	With POC
Diabetes	9	5
Gastroenterology	1	1
Immunology	10	1
Oncology	28	3
Primary Care	15	4
Respiratory	5	6
Totals	68	20

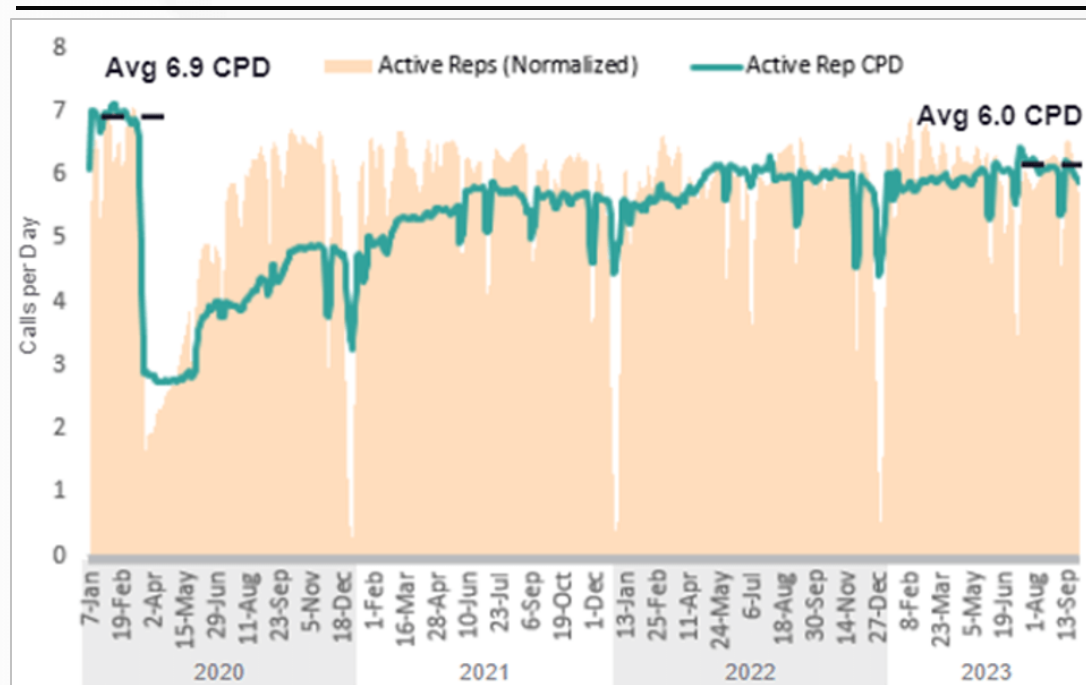*An analysis of ~90 campaigns over the past five years*

% Increase in TRX

TV, Digital + POC

Increased overall effectiveness of campaign 6% - 8% over TV and digital

POC is More Critical than Ever:
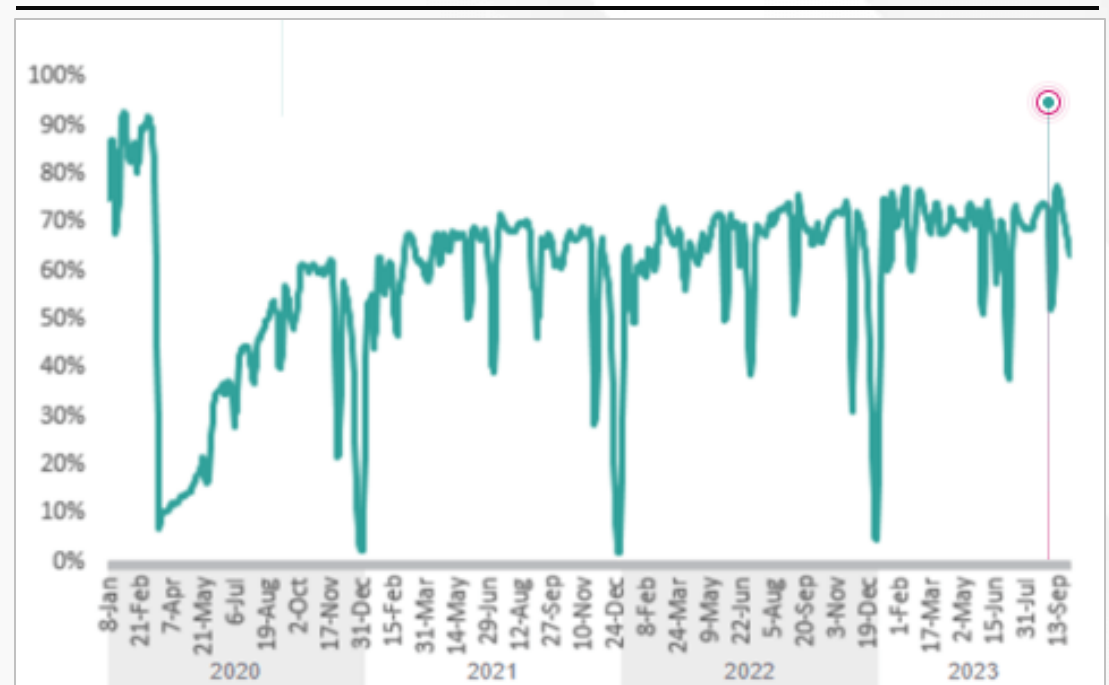# Decreased Access for Pharmaceutical Reps

Face-to-Face and Remote Calls Per Day(CPD)
With count of active[2] reps

Face-to-Face and Remote Calls Activity
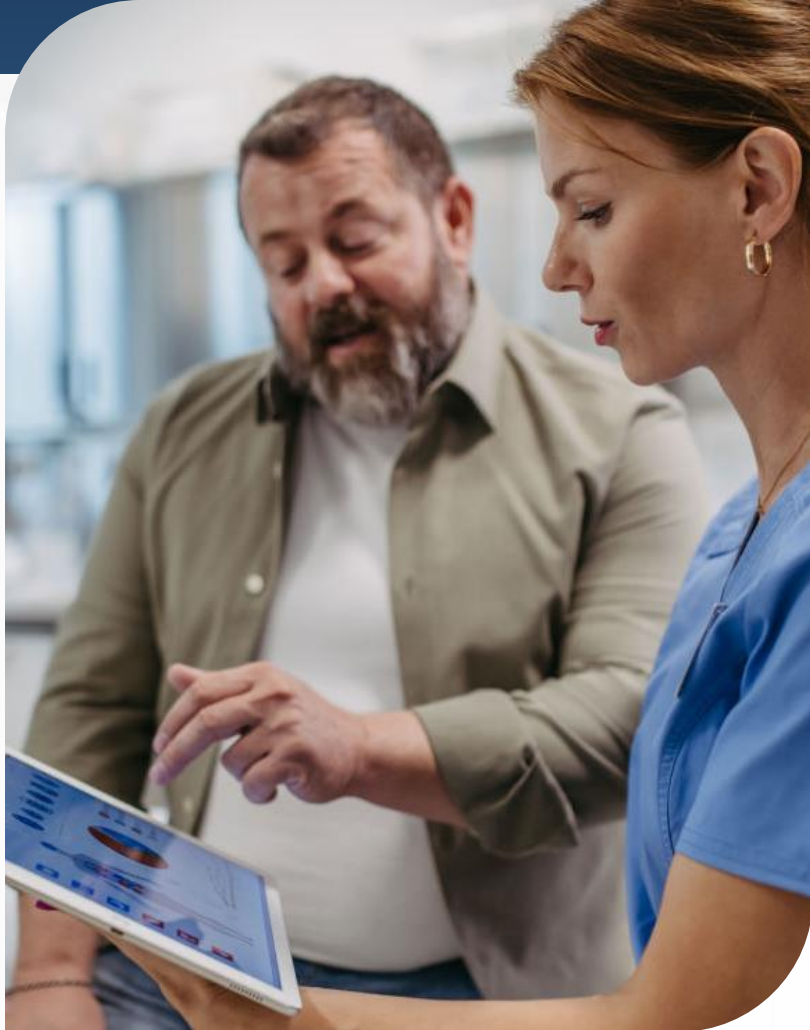(Normalized to pre-COVID Levels)

1. Showing a 5-day moving average: based on data from subset of AccessMonitor subscribers
2. Reps making at least one HCP all (face-to-face or remote) that day

Daily activity for f2F and Remote calls by pharma reps remain low as of Q3'23, resulting in ~1 call daily in call volume recovery of 82%

Physician Responses To POC Is Positive

"If they see a poster about something – like a treatment or a device – it makes them more receptive when I bring it up." – *Endocrinologist*

"It offers patient education and information in a way that is auto-updated – my staff doesn't have to do anything." – *Primary care*

"They can get more information on screens, in printed materials, posters, on TV. They can even have things sent to themselves through email." - *Gastroenterologist*

Physician Impact:
POC Content Supports Health Journeys

Informs and Educates

- Educates on diseases and treatments
- Reinforces physician messages
- Improve health literacy

Supports Patient – Physician Interactions

- Initiates conversations about conditions
- Invites discussion about treatments and devices
- Encourages patient acceptance of physician recommendations

Diversifies ways to interact and engage

- Different channels in the office provide options
- Patients engage in ways that fit their interest and needs
- Multi-channel reinforcement aids patient recall

HCPs are eager for **increases** in POC solutions

Generational Engagement

- Younger patients readily adopt new digital channels

- Simpler interfaces or print may improve patient engagement as older patients have difficulty with screens and wallboards

- Optimizing content readability would enhance accessibility for mature patients

"My older patients have a hard time using the tablets. They are less likely to look up information, while younger patients and staff members embrace them."

– Neurology

Continual Refreshment

- Physicians desire more regularly updated and higher diversity of patient messaging from pharma

- Healthcare providers and staff seek fresh, relevant content across print and digital platforms

"I wish they changed the messages and information more often. Patients like to click on the information and learn, but sometimes it is the same as it was the last time they were in."

– Primary Care

Patient Responses to POC Indicate Trust and Impact

"I learn a lot of health information from what I see on the TV in the office. iPads, too. There is always something new and I like to stay up-to-date." – Primary Care Patient

"When they hand you something or it's right there in the office, I know I can trust that." – MS Patient

"I saw something on the wall, and I asked my doctor, and he switched me to the new medicine." – CKD Patient

Patient Impact:
POC Content Supports Health Journeys

Informative

- Patients prioritize learning about their condition

- Value educational materials from their physician

- Often report using point of care messaging as a resource to learn about new medications

Trustworthy

- In-office and POC messaging is seen as "doctor-approved"

- Believe physicians put the message there for them

- See the messages at point of care as more reliable than what they find online or from friends and family

Impactful

- Patients discuss new treatments with physicians due to POC exposure

- Point of care messages help reinforce information given to patients in the exam – which patients often don't remember

Patients want **plain speak,** increased diversity and **relevancy** of medical information at the POC

Confusing Content

Want to easily understood content from pharmaceutical companies, asking for simpler language vs. scientific and more complex terms Increase readability with bigger font size and bullet points vs. long sentences

"Some of those [brochures] were **confusing,** they were on the pharmaceutical level. I barely understood what kidneys actually do, let alone all the medical speak."

– CKD Patient

Limited Scope

Patients are eager for information about new treatments but don't always find what they are looking for in the office.

"Have more information for the patient. Explain their illness. It is so **hard to find information** that is complete and accurate."

– MS Patient

Affordability and Access

Want more information about affordability, formulary coverage, and approvals in-office and across POC resources.

"I had to switch medications twice because my insurance wouldn't cover the ones my doctor prescribed. I ask questions and look for info, but **nothing seems to be available**."

– CKD Patient

Multiple opportunities exist to support HCPs

POC Physician Support

- Increase health and wellness content to support patients' quality of life

- Provide information on clinical trials and future treatments

- Educate on insurance policy navigation for office staff

- Develop support materials for patient consultations on conditions and treatments

- Offer post-consultation digital content and videos for patients

Unmet needs for Patients

Patient Enablement

- Provide **realistic guidance and support** on resuming normal activities – "get back to normal"

- Offer **easy access to information** via QR codes for mobile delivery

- Include **transparent and comprehensive side effect data**, including prevalence of side effects and drug comparisons

- Share **details on patient support programs** for medications and transportation

- Create **instructional videos** on proper drug administration

- Feature **patient stories** highlighting disease management and treatment experiences

- Develop **sharable materials for patients** to coordinate care across healthcare providers and raise awareness about their condition

Key Takeaways

- Adding POC to the DTC media mix of TV and Digital **increased effectiveness** among campaigns analyzed

- Patients and physicians....

  o **trust** the content they find at the POC

  o are **eager for more** educational content at the POC

  o want **more diverse** and **frequently updated** POC content

  o **seek resources** to better understand conditions and treatment options, especially with multi-specialty care plans

- Increase engagement by

  o **optimizing formats** and **interfaces** to meet the needs of aging populations

  o utilizing plain speech to **increase comprehension** of material

FOR MORE INFORMATION:

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Thank you