



Advertising and Promotion Regulatory Affairs Conference

March 8-10 | Virtual

R.J. Lewis

The Future of HCP Marketing
eHealthcare Solutions | Tap Native



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AGENDA HCP Digital Marketing Trends for 2021

- ▶ Accelerated **Digital Transformation** underway at pharma
- ▶ **Physician-Level Data (PLD)** & Campaign data for “Next Best Action”
- ▶ **Telehealth** – unprecedented rapid adoption
- ▶ **Privacy** laws, by state and a national privacy laws
- ▶ **Advertising & Marketing Trends**
 - Display Advertising
 - Native advertising
 - Digital Video advertising (HCP is next)
 - Programmatic

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COVID Accelerated Catapulted Digital Transformation

Digital Transformation

Telehealth

Physician-Level Data (PLD)

Privacy

Advertising Trends



Pharma Guy
@pharmaguy

...

Who led the digital transformation at your company?



“Our 5-year digital transformation strategy just got reprioritized into a 5-month strategy”
- Pharma Client in April 2020

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Enter the “Digital Launch”

Digital Transformation

Telehealth

Physician-Level Data (PLD)

Privacy

Advertising Trends

- ▶ **Delayed Launch: BMS’s Zeposia (MS)**
 - Approved late March 2020, “delayed launch”
 - “We’re putting some of our promotional messages into the digital space.” - Tina Deignan, VP of immunology at BMS
- ▶ **Altered Launch: Clarus Therapeutics Jatenzo (testosterone)**
 - February 2020 launch
 - “We literally pivoted within three days,” said Frank Jaeger, chief commercial officer at Clarus. “We pulled our reps on a Thursday and by Monday all materials were approved through MLR and submitted to FDA for first use. On Tuesday, our reps were out there able to virtually educate doctors. Three days after pulling them from the field.”

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<https://www.mmm-online.com/home/channel/a-tale-of-two-drug-launches-during-coronavirus/>

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Enter the “Digital Launch”

Digital Transformation

Telehealth

Physician-Level Data (PLD)

Privacy

Advertising Trends

IQVIA

🏠 - Solutions - Commercialization - Healthcare Professional Engagement — Select a Topic ▾



Engaging with HCPs digitally is an integral part of the success of a brand. In fact, the most successful launches in the world's top 7 countries had a digital share of promotion that was 64% higher than all others.

CHANNELDYNAMICS Q3 2017;
MIDAS Q3 2017.

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<https://www.iqvia.com/solutions/commercialization/healthcare-professional-engagement>

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Pre-COVID Pharma Struggled With Public Reputation

Digital
Transformation

Telehealth

Physician-Level
Data (PLD)

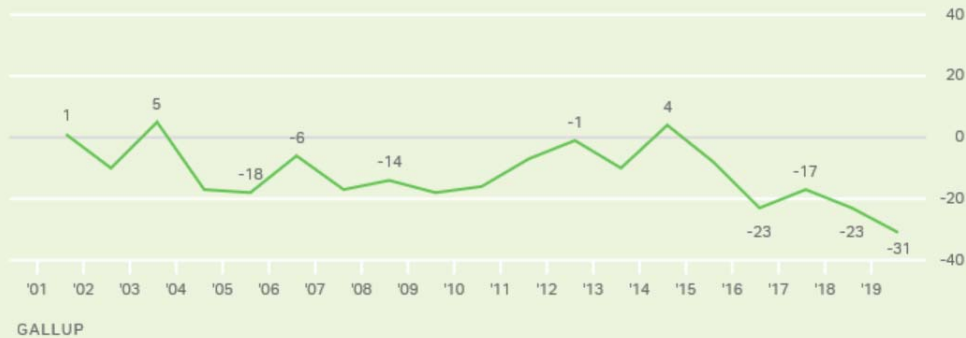
Privacy

Advertising
Trends

Americans' Views of the Pharmaceutical Industry, 2001-2019

Net positive = % holding a positive view of the industry minus % holding a negative view

Net positive



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<https://www.iqvia.com/solutions/commercialization/healthcare-professional-engagement>

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Pharma Has A Target On Its Back From Politicians On All Sides

Digital
Transformation

Telehealth

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Data (PLD)

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Trends



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How long can Pharma carry a salesforce?

Digital Transformation

Telehealth

Physician-Level Data (PLD)

Privacy

Advertising Trends

Michael Bloomberg

"If Michael Bloomberg ran again for Mayor of New York, he wouldn't get 10% of the vote – they would run him out of town! #NeverHillary" —@realDonaldTrump

Glenfiddich (William Grant & Sons)

Goldman Sachs

"Was there another loan that Ted Cruz FORGOT to file. Goldman Sachs owns him, he will do anything they demand. Not much of a reformer!" —@realDonaldTrump

of all Glenfiddich garbage alcohol from Trump properties." —@realDonaldTrump

HP (Carly Fiorina, former CEO)

"Carly Fiorina did such a horrible job at Lucent and HP, virtually destroying both companies, that she never got another CEO job offer! Pres." —@realDonaldTrump

look are burying the FBI criminal investigation of —@realDonaldTrump

Fox News (News Corp)

"Wow, you are all correct about @FoxNews – totally biased and" —@realDonaldTrump

GM

"General Motors is sending Mexican made model of Chevy Cruze to U.S. car dealers- in the U.S. & Canada. The reason is..." —@realDonaldTrump

H&R Block

Retweet: "@Sattendoll: @realDonaldTrump – I do not in business."

JP Morgan

"If JP Morgan took their case through the courts for 15 years, nobody would be suing them—easy target." —@realDonaldTrump

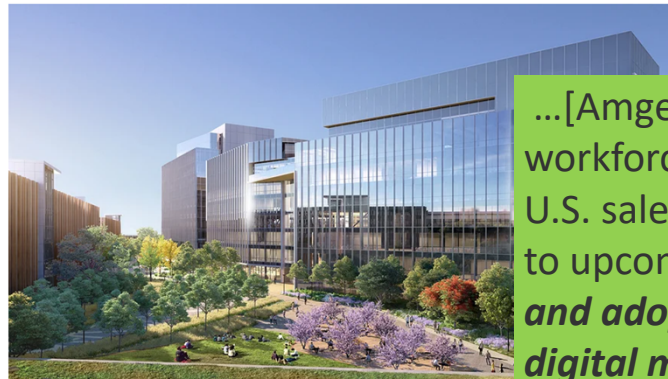
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Amgen cuts 500 U.S. jobs, primarily sales reps, as COVID-19 speeds a shift to digital

by Beth Snyder Bulik | Feb 3, 2021 2:26pm



Amgen laid off about 500 U.S. employees, mostly sales reps, in a reorg that includes moves to more digital engagement.



Amgen is cutting 500 jobs, and its U.S. sales teams are bearing the brunt of it.

The California-based drugmaker confirmed Wednesday that it is shrinking its workforce, "primarily in the U.S. sales force," as it pivots to upcoming drug launches and adopts pandemic-time digital marketing tools for the long run. A spokesperson confirmed the total number of jobs is approximately 500.

...[Amgen] is shrinking its workforce, "primarily in the U.S. sales force," as it pivots to upcoming drug launches and adopts pandemic-time digital marketing tools for the long run.

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<https://www.fiercepharma.com/marketing/amgen-cuts-several-hundred-u-s-jobs-primarily-sales-reps-as-covid-19-speeds-a-shift-to-digital>

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HCPs are not known for “Rapid Adoption” of any technology.... ...but then came Telehealth

Digital
Transformation

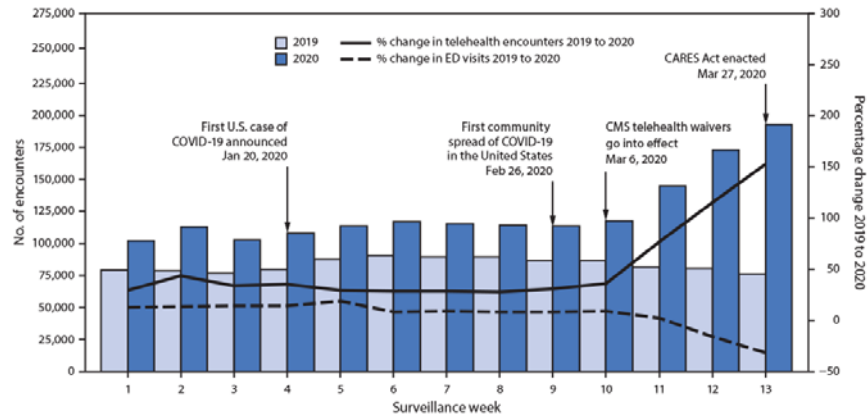
Telehealth

Physician-Level
Data (PLD)

Privacy

Advertising
Trends

FIGURE 1. Number of telehealth patient encounters reported by four telehealth providers that offer services in all states and percentage change in telehealth encounters and emergency department (ED) visits — United States, January 1–March 30, 2019 (comparison period) and January 1–March 28, 2020 (early pandemic period)*



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Triggered by Coronavirus, Telehealth Quickly Captured Share Elsewhere

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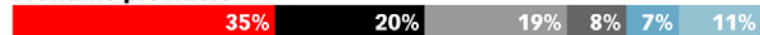
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Advertising
Trends

Coronavirus Impact: Share of Time Spent with Telehealth According to US Frontline Providers* vs. Primary Care Physicians**, by Activity, April 2020

% of respondents in each group

Frontline providers*



Primary care physicians**



■ Coronavirus urgent care ■ New consultations
■ Noncoronavirus urgent care ■ Provider to provider
■ Routine follow-ups ■ Other

Note: frontline healthcare providers n=182; primary care physicians n=122; *includes emergency, ICU, infectious diseases and hospitalists; **and other specialists

Source: Bain & Company, "Frontline of US Healthcare Survey" as cited by company blog; eMarketer calculations, April 17, 2020

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Turns out patients like it too...

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Telehealth

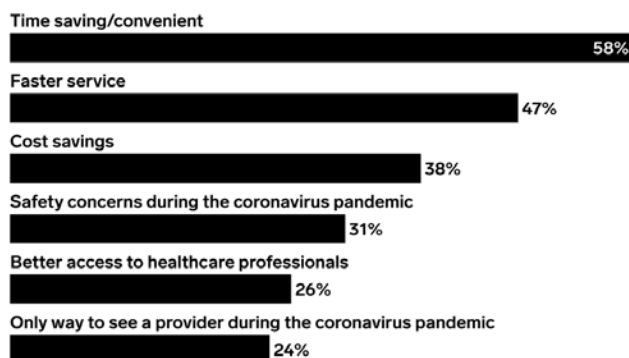
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Data (PLD)

Privacy

Advertising
Trends

Why Would US Adults Be Willing to Have a Video Visit with a Doctor?

% of respondents, June 2020



Note: n=655 ages 18+ who have not had a video visit but are willing to
Source: Amwell, "2020 Amwell Physician and Consumer Survey" conducted by Dynata and M3 Global Consulting, Oct 6, 2020

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eMarketer | InsiderIntelligence.com

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"WE NEED DIGITAL DATA!"

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► WWAD? (What would Amazon do?)

► Next Best Action

- a sub-class of artificial intelligence (AI) technology, is increasingly being used by businesses to improve customer engagement, respond to target audience needs and interests and advance corporate objectives.
- Five Key Components:
 - Data (structured and unstructured)
 - Analytics
 - Customer Triggered Personalization
 - Real-time (inbound and outbound)
 - Verification (feedback loop)

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<https://insights.conduent.com/conduent-blog/applying-next-best-action-technology-in-pharmaceutical-services>

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HCP Marketing Today = Physician Level Data (PLD)

Digital
Transformation

Telehealth

Physician-Level
Data (PLD)

Privacy

Advertising
Trends

- ▶ Target list is not enough
 - Who?
 - Where?
 - When?
 - How?
 - Why?
- ▶ Identifiable actionable insights to inform our “Next Best Action”
- ▶ PaaS – Pharma as a Service: Information on Demand

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State-by-State National Patchwork of Privacy Emerging

Digital
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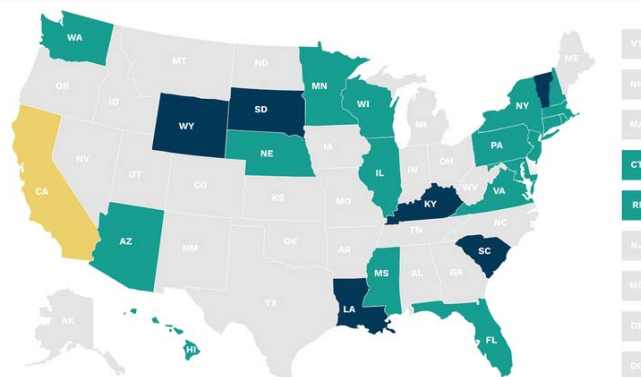
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Advertising
Trends

State Privacy Legislation in 2020

States with privacy legislation this session

Introduced comprehensive bill Introduced limited bill Legislation enacted



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Source: MultiState Associates. Data as of March 3, 2020.

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Big Tech Calls For Simplicity in a National Law (or builds a moat)

Digital Transformation

Telehealth

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Privacy

Advertising Trends

CONGRESS

As Congress stalls on data privacy, Big Tech tangles with states

California Consumer Privacy Act has become a catalyst for states that are considering similar measures

Technology

Apple preaches privacy. Lawmakers want the talk to turn to action.

As states introduce privacy legislation, the tech giant is either absent from those efforts or backs industry groups that actively lobby against them.

Google releases framework to guide data privacy legislation

BY HARPER NEIDIG - 09/24/18 03:52 PM EDT 85 COMMENTS

TECH

Mark Zuckerberg says he wants stricter European-style privacy laws — but some experts are questioning his motives

PUBLISHED MON, APR 1 2019 7:25 AM EDT | UPDATED MON, APR 1 2019 7:23 AM EDT

Elizabeth Schultz @ESCHULTZ

Salesforce CEO Marc Benioff Calls for National Privacy Law

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Taking Action: Earthquake Shakes the Foundation of Programmatic

Digital Transformation

Telehealth

Physician-Level Data (PLD)

Privacy

Advertising Trends

BREAKING Senate passes bill to give businesses flexibility in spending coronavirus aid, sends it to Trump

MARKETS BUSINESS INVESTING TECH POLITICS CNBC TV

Google plans to kill support for third-party cookies that track you all over the internet


PUBLISHED TUE, JAN 14 2020 12:13 PM EST | UPDATED TUE, JAN 14 2020 4:35 PM EST

Megan Graham @MEGANGRAHAM


KEY POINTS

- In a blog post, Google said it plans to phase out support for third-party cookies in the Chrome web browser within two years.
- Third-party cookies can be used to track users, target ads and see how they perform.
- Apple's Safari browser and Mozilla's Firefox browser have made similar moves to limit cookies.

RELATED



How to use Apple Pay: the ultimate guide to paying with your iPhone, Apple Watch, Mac or iPad



How singles are meeting up on dating apps like Tinder, Bumble, Hinge during coronavirus pandemic

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Turns out consumers like it... National Privacy Law Likely

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Attitudes Toward Government Control of Select Company Practices According to US Adults, March 2020

% of respondents

Would like to see the government reform how companies treat my data



Would like to see the government reform monopolistic practices of companies



Would like to see the government increase regulation of companies online



■ Agree ■ Neutral ■ Disagree

Note: n=1,500 ages 18-70

Source: Performics' and Northwestern University's Intent Lab, "Digital Satisfaction Index: Brand Trust Spotlight," Aug 20, 2020

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Accelerating Growth Rate: Total Digital Ad Spending in Healthcare & Pharma

Digital
Transformation

Telehealth

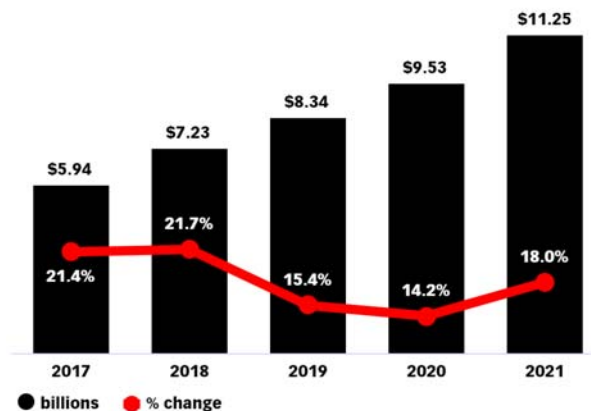
Physician-Level
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Trends

Healthcare & Pharma Industry Digital Ad Spending

US, 2017-2021



Source: eMarketer, July 2020

www.eMarketer.com

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Accelerating Growth Rate: Digital *Display* Ad Spending in Healthcare & Pharma

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Telehealth

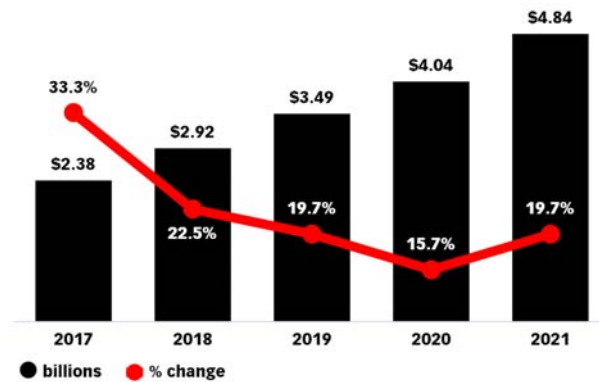
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Healthcare & Pharma Industry Display Ad Spending

US, 2017-2021



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Source: eMarketer, July 2020

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2020 Has Changed Long-Term Forecasts for Digital Ad Spend

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Transformation

Telehealth

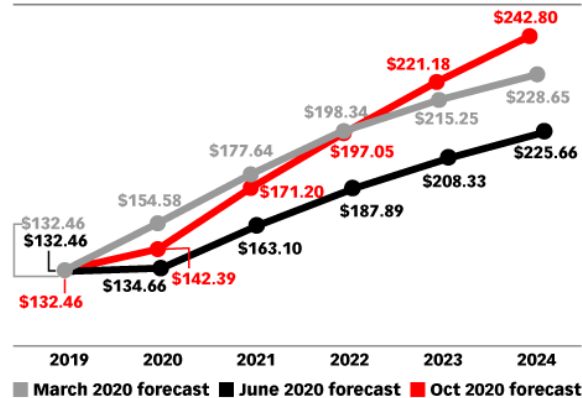
Physician-Level
Data (PLD)

Privacy

Advertising
Trends

How Has the Forecast for Digital Ad Spending in the US Changed? 2019-2024

billions, March vs. June vs. Oct 2020



Note: includes advertising that appears on desktop and laptop computers as well as mobile phones, tablets, and other internet-connected devices, and includes all the various formats of advertising on those platforms

Source: eMarketer, Oct 2020

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Q d w y n # D g y h u w i b j # O r m n v # D h h # r q w h q w

The diagram illustrates the integration of various digital health topics into a BMJ Journals article abstract and a TREND MD widget. On the left, a vertical stack of green boxes lists the topics: Digital Transformation, Telehealth, Physician-Level Data (PLD), Privacy, and Advertising Trends. These topics are linked by brackets to two components: 'Article abstract' and 'TREND MD widget'. The 'Article abstract' is represented by a screenshot of a BMJ Journals article page, showing the title, authors, and a summary. The 'TREND MD widget' is represented by a screenshot of a widget displaying multiple horizontal bars, likely representing different data points or trends. The entire diagram is set against a green background with a white border.

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U h f r p p h o g h g # s r q v r u n g # D h n v # # Q r q v s r q v r u n g

The diagram illustrates the integration of various digital health topics into a BMJ Journals article abstract and a TREND MD widget, with a focus on sponsored and non-sponsored content. On the left, a vertical stack of green boxes lists the topics: Digital Transformation, Telehealth, Physician-Level Data (PLD), Privacy, and Advertising Trends. These topics are linked by brackets to two components: 'Article abstract' and 'TREND MD widget'. The 'Article abstract' is represented by a screenshot of a BMJ Journals article page, showing the title, authors, and a summary. The 'TREND MD widget' is represented by a screenshot of a widget displaying multiple horizontal bars, likely representing different data points or trends. The entire diagram is set against a green background with a white border.

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Q dwyh#Dgyhuwlbj #Ormv#Dhh#F rqrhwq

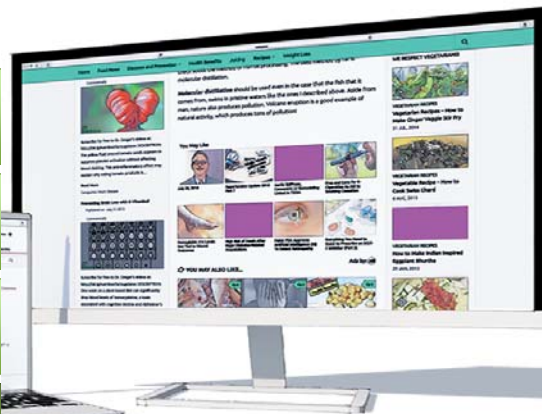
Digital
Transformation

Telehealth

Physician-Level
Data (PLD)

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Advertising
Trends



↑74%

Native time on site (TOS)
consistently outperforms the
industry benchmark
by 74% on average.*

*Source: EHS Campaign Data

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Cord Cutters To Surpass “Pay TV” Customers

Digital
Transformation

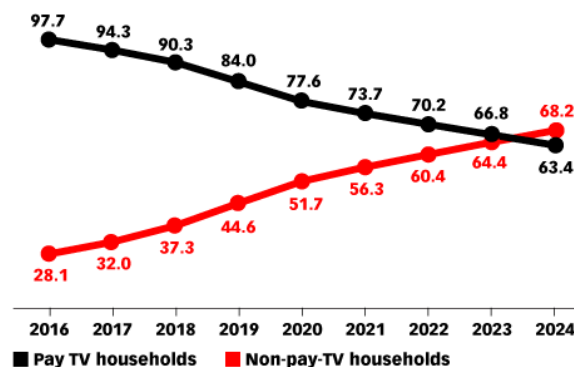
Telehealth

Physician-Level
Data (PLD)

Privacy

Advertising
Trends

US Pay TV vs. Non-Pay-TV Households, 2016-2024
millions



Note: pay TV households are those with a subscription to traditional pay TV services; excludes IPTV and pure-play online video services (e.g., Hulu, Netflix, YouTube, Sling TV); non-pay-TV households are those that have canceled their subscription or have never had traditional pay TV services
Source: eMarketer, Sep 2020

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Digital Video Now Exceeds Analog Video

Digital Transformation

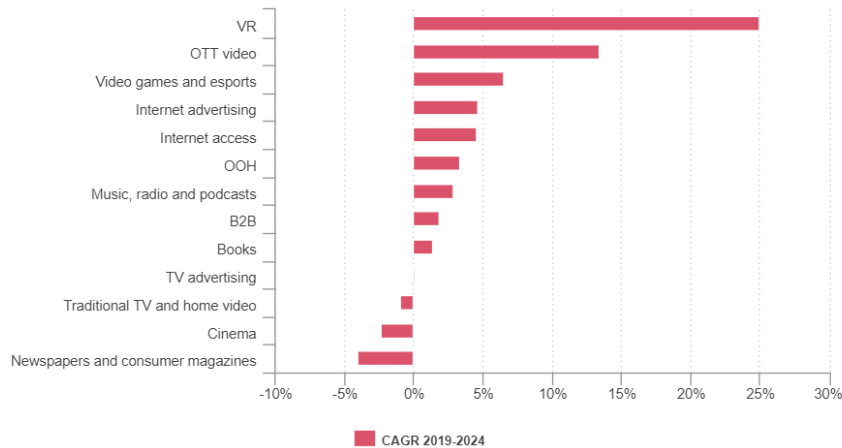
Telehealth

Physician-Level Data (PLD)

Privacy

Advertising Trends

Segment compound annual growth rate for next five years



Source: PwC Global Entertainment & Media Outlook 2020-2024 (Data consumption is not included in this chart)

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Digital Video Now Exceeds Analog Video

Digital Transformation

Telehealth

Physician-Level Data (PLD)

Privacy

Advertising Trends

Which Segments Are Driving US Digital Display Ad Spending Growth in 2020?

billions and % change

| | Incremental digital display ad spending | % change |
|---------------------------|---|-------------|
| Format | | |
| Video | \$3.59 | 11.3% |
| Native* | \$2.18 | 4.8% |
| Banners and other | \$0.26 | 0.8% |
| Nonvideo rich media | \$0.11 | 2.0% |
| Sponsorship | -\$0.06 | -2.0% |
| Device | | |
| Mobile | \$3.39 | 6.8% |
| Connected TV | \$1.61 | 25.2% |
| Desktop/laptop | -\$1.10 | -7.5% |
| Transaction method | | |
| Programmatic | \$3.72 | 6.2% |
| Nonprogrammatic | \$0.18 | 1.6% |
| Total | \$3.90 | 5.5% |

Note: category breakouts may overlap; read as sponsorship ad spending will decrease by \$0.06 billion and digital video ad spending will increase by \$3.59 billion in 2020; *includes various native formats, including video and nonvideo ads

Source: eMarketer, Aug 2020

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Expected Shifts in Programmatic B2B Ad Budgets

Digital
Transformation

Telehealth

Physician-Level
Data (PLD)

Privacy

Advertising
Trends

How Do B2B Marketing Professionals Worldwide Expect Their Programmatic Advertising Budget to Change?

% of respondents, May 2020

| | |
|----------------------|-----|
| Increase by 25%+ | 21% |
| Increase 11%-24% | 10% |
| Increase 10% or less | 38% |
| Decrease 10% or less | 13% |
| Decrease 11%-24% | 12% |
| Decrease by 25%+ | 6% |

Note: in the next 6 months

Source: Ascend2, "The State of Programmatic Advertising: Strategies, Tactics & Trends," May 27, 2020

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Targeting Audiences is the Most Effective B2B Programmatic Tactic

Digital
Transformation

Telehealth

Physician-Level
Data (PLD)

Privacy

Advertising
Trends

Most Effective Tactics for Their Programmatic Advertising Program According to B2B Marketing Professionals Worldwide, May 2020

% of respondents

| | |
|------------------------------|------------|
| Audience targeting | 63% |
| Keyword targeting | 39% |
| Contextual targeting | 35% |
| Increasing automation | 33% |
| Retargeting | 32% |
| Testing creative | 24% |
| Geotargeting | 19% |
| Other | 8% |

Note: respondents could choose up to 3

Source: Ascend2, "The State of Programmatic Advertising: Strategies, Tactics & Trends," May 27, 2020

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But it is Also the Biggest Challenge for Marketers

Digital
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Telehealth

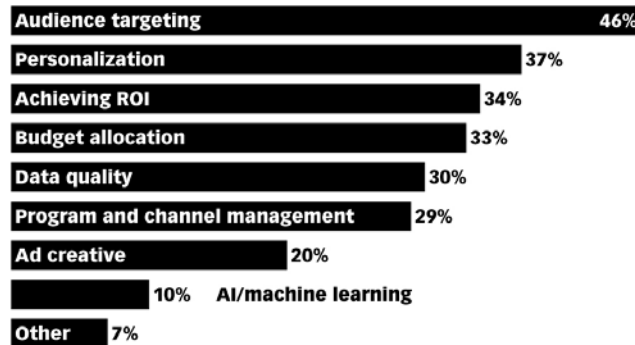
Physician-Level
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Trends

What Are the Leading Challenges for B2B Marketing Professionals Worldwide When Executing a Programmatic Advertising Strategy?

% of respondents, May 2020



Note: respondents could choose up to 3
Source: Ascend2, "The State of Programmatic Advertising: Strategies, Tactics & Trends," May 27, 2020

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...And That's Just How the Cookie Crumbles...

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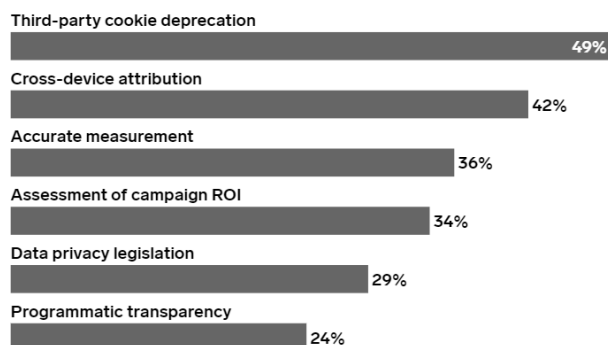
Physician-Level
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Digital Media Challenges According to US Digital Media Professionals, Oct 2020

% of respondents



Note: top 3 responses; in the next 12 months
Source: Integral Ad Science (IAS), "The 2021 Industry Pulse Report: US Edition," Dec 8, 2020

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