

Exactly how patient centric is your brand?

Measuring patient centricity across
6 disease states and **40+ brands** using social
listening and machine learning algorithms



Framework for measuring patient centricity

How we talk to patients in our messaging?

STATED

INSIDE-OUT

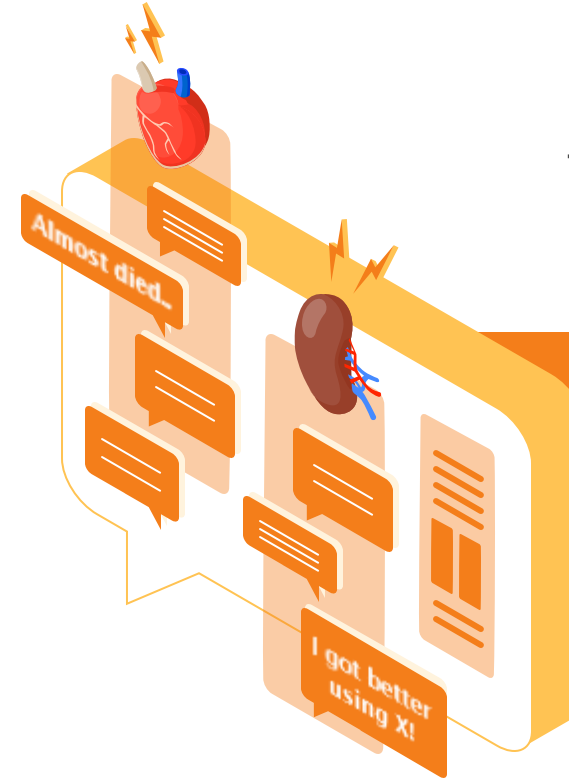


Does **our messaging** reflect patient centricity?

How patients talk about us on social media?

DERIVED

OUTSIDE-IN



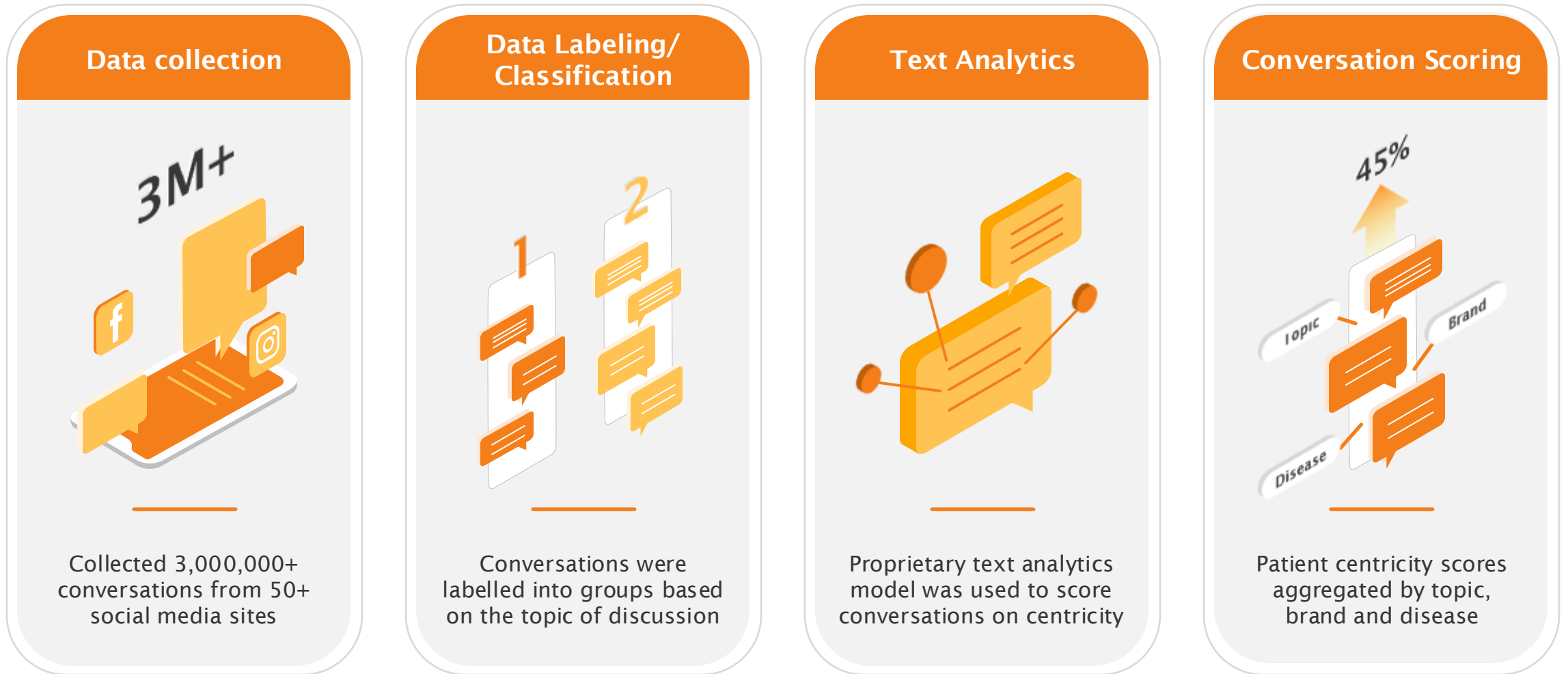
Do **patient conversations** recognize our patient centricity?

&

Measuring Patient Centricity in Brand Messaging



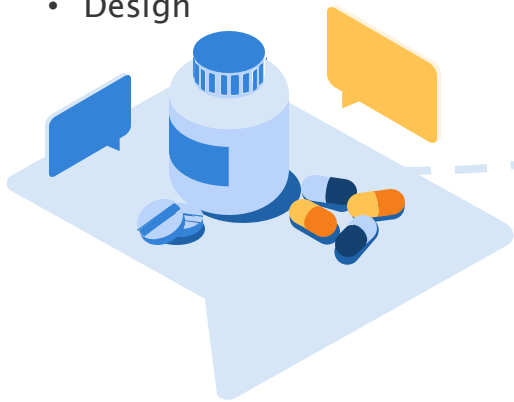
Measuring Centricity in Patient Conversations



Labelling Patient Conversations based on Topic of Discussion

Product Related

- Efficacy
- Safety
- Dosing
- Design



Clinical Trial Related

- Trial information
- Trial registration
- Trial experience



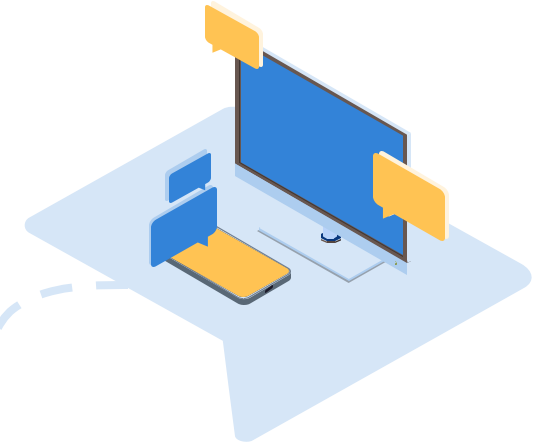
Support Related

- Financial
- Nurse Hotline
- Shipping/Delivery



Communications Related

- TV
- Website
- Social Media
- All other



Disease States and Brands Included in the Analysis



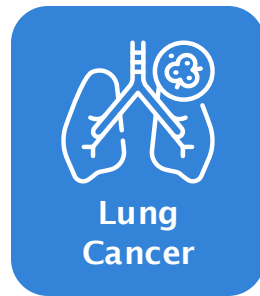
- Ozempic
- Rybelsus
- Mounjaro
- Farxiga
- Jardiance
- Invokana
- Wegovy
- Zepbound



- Cimzia
- Rinvoq
- Xeljanz
- Kevzara
- Orencia
- Actemra



- Skyrizi
- Taltz
- Tremfya
- Cosentyx
- Bimzelx
- Cimzia



- Keytruda
- Opdivo
- Tecentriq
- Tagrisso
- Alecensa
- Xalkori
- Imfinzi



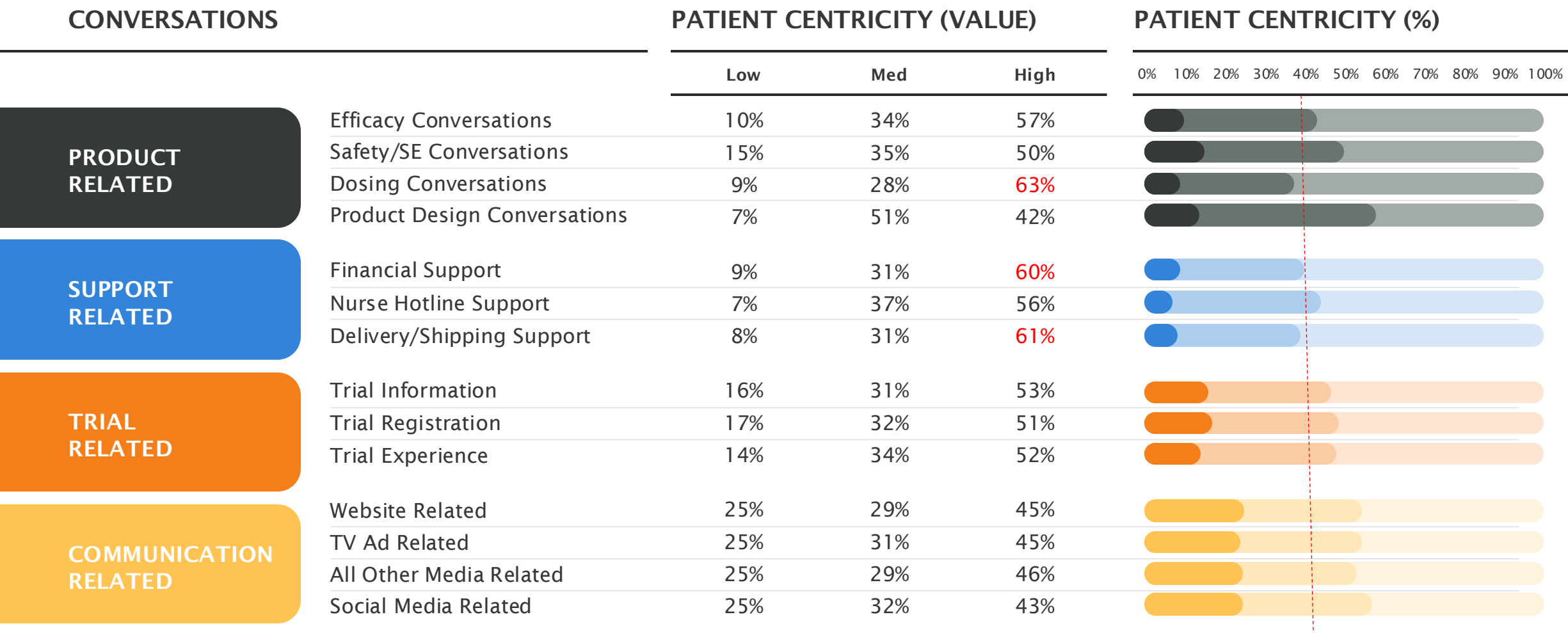
- Ibrance
- Kisqali
- Verzenio
- Lynparza
- Enhertu
- Tukysa
- Trodelvy



- Aimovig
- Qulipta
- Zavzpret
- Nurtec
- Emgality
- Vyepti
- Ubrelvy
- Ajovy

Diabetes/Obesity – Disease Level Patient Centricity

Diabetes/obesity conversations show highest patient centricity on the topics of Dosing, Financial Support, and Delivery/Shipping



Diabetes – Brand Level Patient Centricity

Among diabetes brands, Jardiance has the most consistent performance on patient centricity in both social media conversations and brand messaging

CENTRICITY IN BRAND CONVERSATIONS

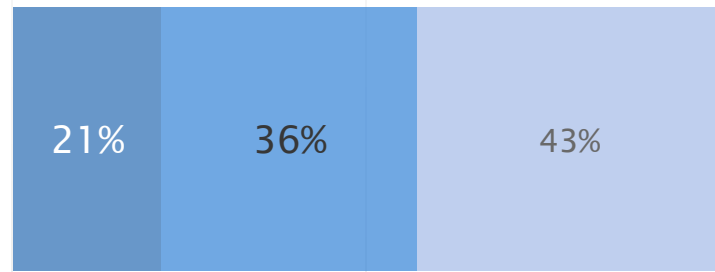
CENTRICITY IN BRAND MESSAGING



Obesity – Brand Level Patient Centricity

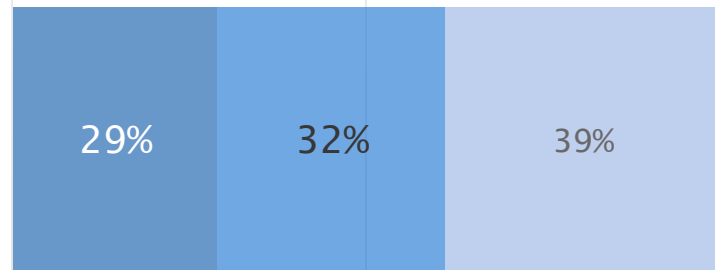
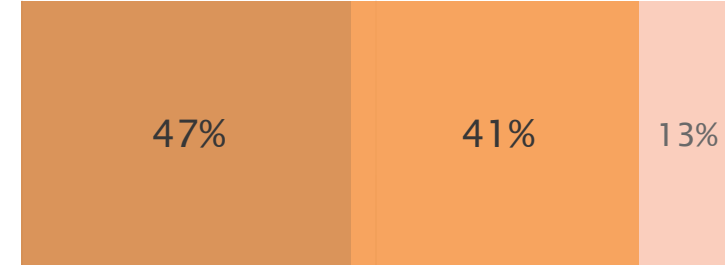
Among obesity brands, Wegovy is currently leading the category on patient centricity in both conversations and messaging

CENTRICITY IN BRAND CONVERSATIONS

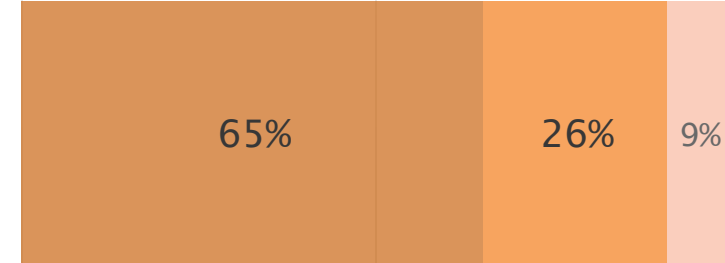


wegovy®

CENTRICITY IN BRAND MESSAGING



zepbound™

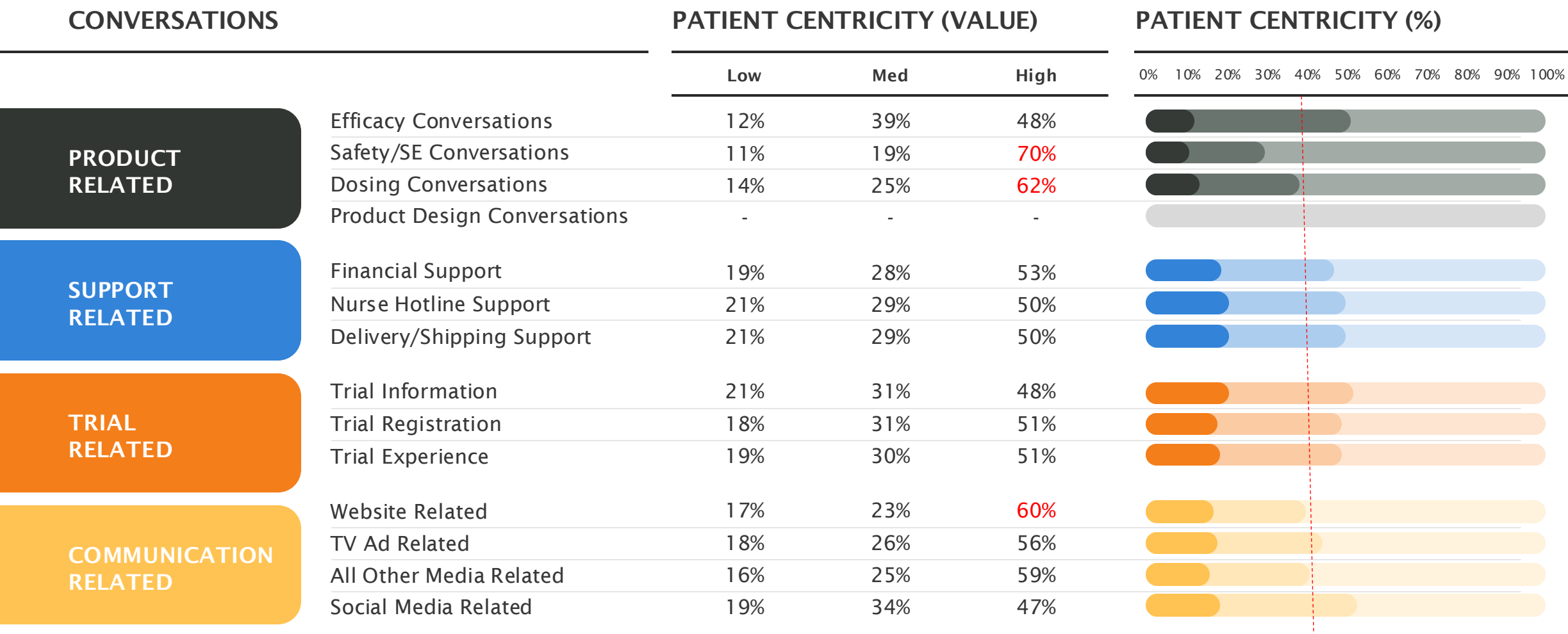


■ % Low ■ % Medium ■ % High

■ % Low ■ % Medium ■ % High

Rheumatoid Arthritis – Disease Level Patient Centricity

RA conversations show highest patient centricity on the topics of Safety, Dosing, and Website



Rheumatoid Arthritis – Brand Level Patient Centricity

Rinvoq is the most consistent performer in RA with comparable patient centricity in conversations and messaging.

CENTRICITY IN BRAND CONVERSATIONS

CENTRICITY IN BRAND MESSAGING



Psoriatic Arthritis – Centricity in Patient Conversations

Compared to rheumatoid arthritis, PsA conversations show lower centricity across all topics and no topic meets the 60% High Centricity threshold.

CONVERSATIONS

PATIENT CENTRICITY (VALUE)

PATIENT CENTRICITY (%)

		Low	Med	High	
PRODUCT RELATED	Efficacy Conversations	29%	28%	42%	
	Safety/SE Conversations	30%	32%	38%	
	Dosing Conversations	38%	21%	42%	
	Product Design Conversations	29%	37%	34%	
SUPPORT RELATED	Financial Support	10%	34%	56%	
	Nurse Hotline Support	19%	37%	44%	
	Delivery/Shipping Support	15%	35%	49%	
TRIAL RELATED	Trial Information	21%	38%	42%	
	Trial Registration	3%	38%	59%	
	Trial Experience	19%	33%	48%	
COMMUNICATION RELATED	Website Related	20%	38%	43%	
	TV Ad Related	18%	38%	44%	
	All Other Media Related	7%	44%	49%	
	Social Media Related	16%	40%	44%	

Psoriatic Arthritis – Patient Centricity by Brand

PsA is the only disease state with perfect alignment patient centricity expressed in social conversations and brand messaging across all brands

CENTRICITY IN BRAND CONVERSATIONS

CENTRICITY IN BRAND MESSAGING



Breast Cancer – Disease Level Patient Centricity

Conversations in breast cancer reflect particularly lower patient centricity with barely two topics even getting up to 50% High Centricity scores and none meeting the 60% High Centricity threshold.

CONVERSATIONS

PATIENT CENTRICITY (VALUE)

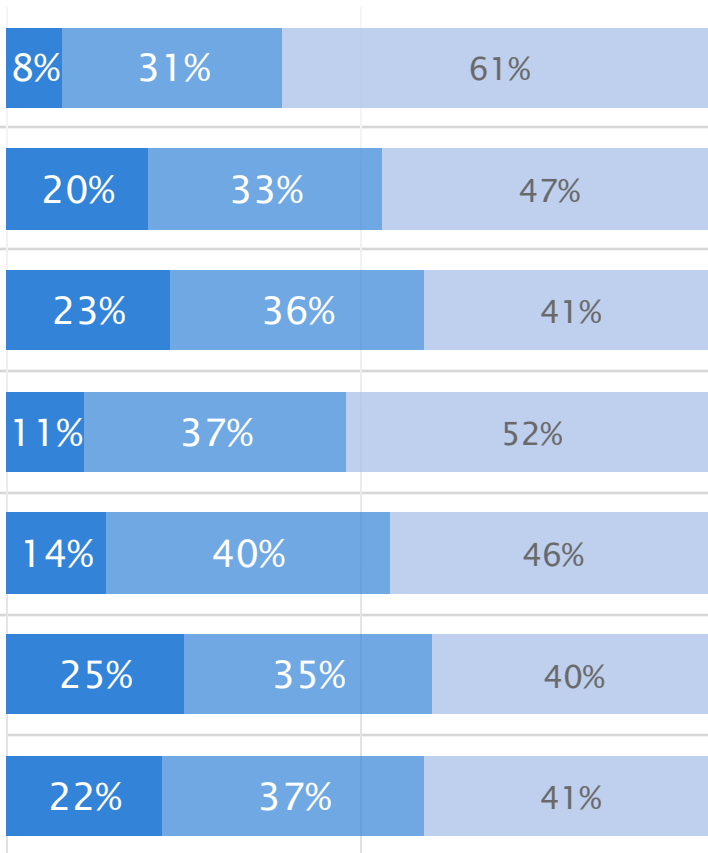
PATIENT CENTRICITY (%)

		Low	Med	High	
PRODUCT RELATED	Efficacy Conversations	25%	34%	41%	
	Safety/SE Conversations	35%	31%	33%	
	Dosing Conversations	23%	31%	46%	
	Product Design Conversations	17%	53%	30%	
SUPPORT RELATED	Financial Support	15%	38%	47%	
	Nurse Hotline Support	12%	44%	44%	
	Delivery/Shipping Support	14%	36%	50%	
TRIAL RELATED	Trial Information	18%	33%	50%	
	Trial Registration	18%	34%	48%	
	Trial Experience	15%	35%	49%	
COMMUNICATION RELATED	Website Related	18%	36%	46%	
	TV Ad Related	17%	37%	46%	
	All Other Media Related	18%	36%	47%	
	Social Media Related	18%	39%	43%	

Breast Cancer – Brand Level Patient Centricity

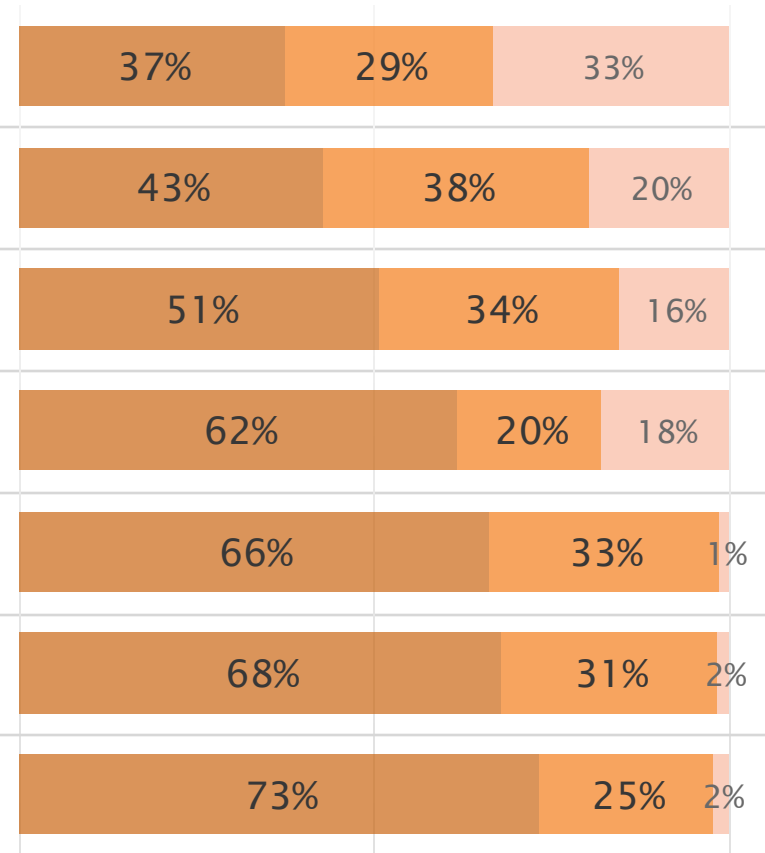
Ibrance leads the market in breast cancer with #1 position in patient centricity across both social conversations and brand messaging

CENTRICITY IN BRAND CONVERSATIONS



■ % Low ■ % Medium ■ % High

CENTRICITY IN BRAND MESSAGING



■ % Low ■ % Medium ■ % High

Lung Cancer – Disease Level Patient Centricity

Conversations in lung cancer reflect a little higher patient centricity than breast cancer, but no topic meets the 60% High Centricity threshold in lung cancer either.

CONVERSATIONS

PATIENT CENTRICITY (VALUE)

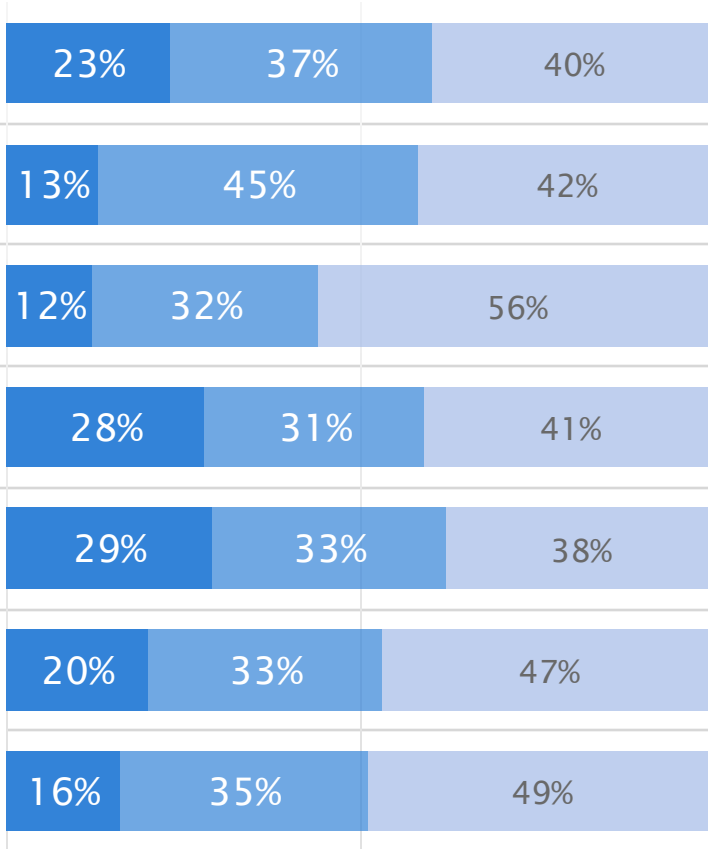
PATIENT CENTRICITY (%)

	PATIENT CENTRICITY (VALUE)			PATIENT CENTRICITY (%)											
	Low	Med	High	0%	10%	20%	30%	40%	50%	60%	70%	80%	90%	100%	
PRODUCT RELATED	Efficacy Conversations	25%	30%	45%											
	Safety/SE Conversations	35%	28%	37%											
	Dosing Conversations	23%	27%	50%											
	Product Design Conversations	17%	49%	34%											
SUPPORT RELATED	Financial Support	19%	30%	51%											
	Nurse Hotline Support	16%	35%	49%											
	Delivery/Shipping Support	18%	30%	52%											
TRIAL RELATED	Trial Information	17%	31%	52%											
	Trial Registration	17%	32%	50%											
	Trial Experience	15%	34%	51%											
COMMUNICATION RELATED	Website Related	17%	32%	50%											
	TV Ad Related	17%	34%	50%											
	All Other Media Related	17%	33%	51%											
	Social Media Related	17%	35%	48%											

Lung Cancer – Brand Level Patient Centricity

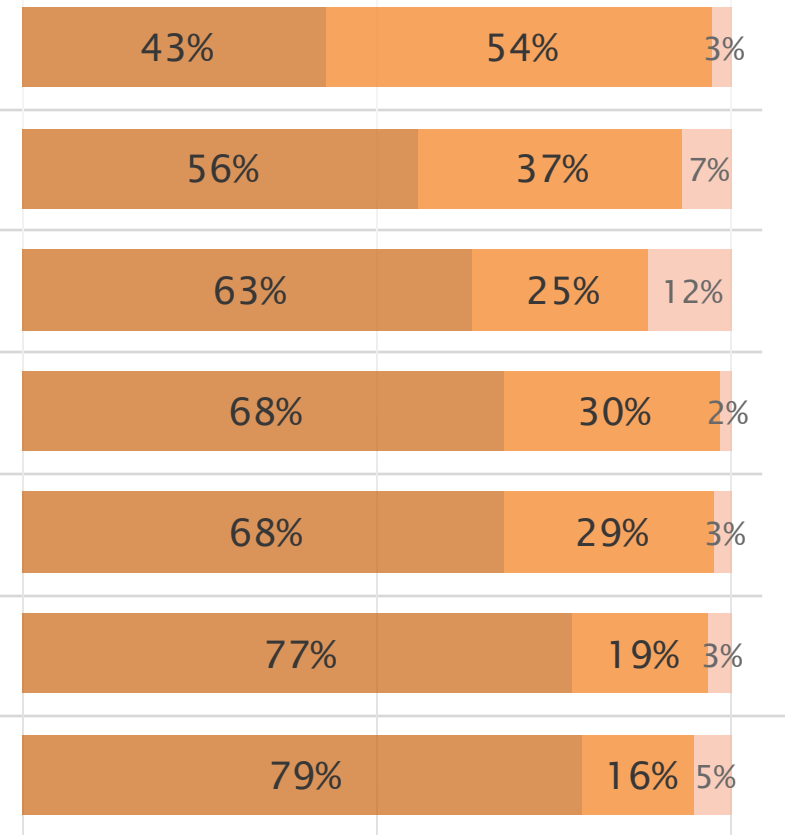
Xalkori and Keytruda have more consistent performance on patient centricity in both conversations and messaging compared to other brands.

CENTRICITY IN BRAND CONVERSATIONS



■ % Low ■ % Med ■ % High

CENTRICITY IN BRAND MESSAGING



■ % Low ■ % Medium ■ % High

5



1

2



2

1



3

6



4

7



5

4



6

3



7

Migraine – Disease Level Patient Centricity

Despite all the new therapies in migraine, social media conversations don't reflect high centricity and only Dosing conversations get close to the 60% High Centricity threshold.

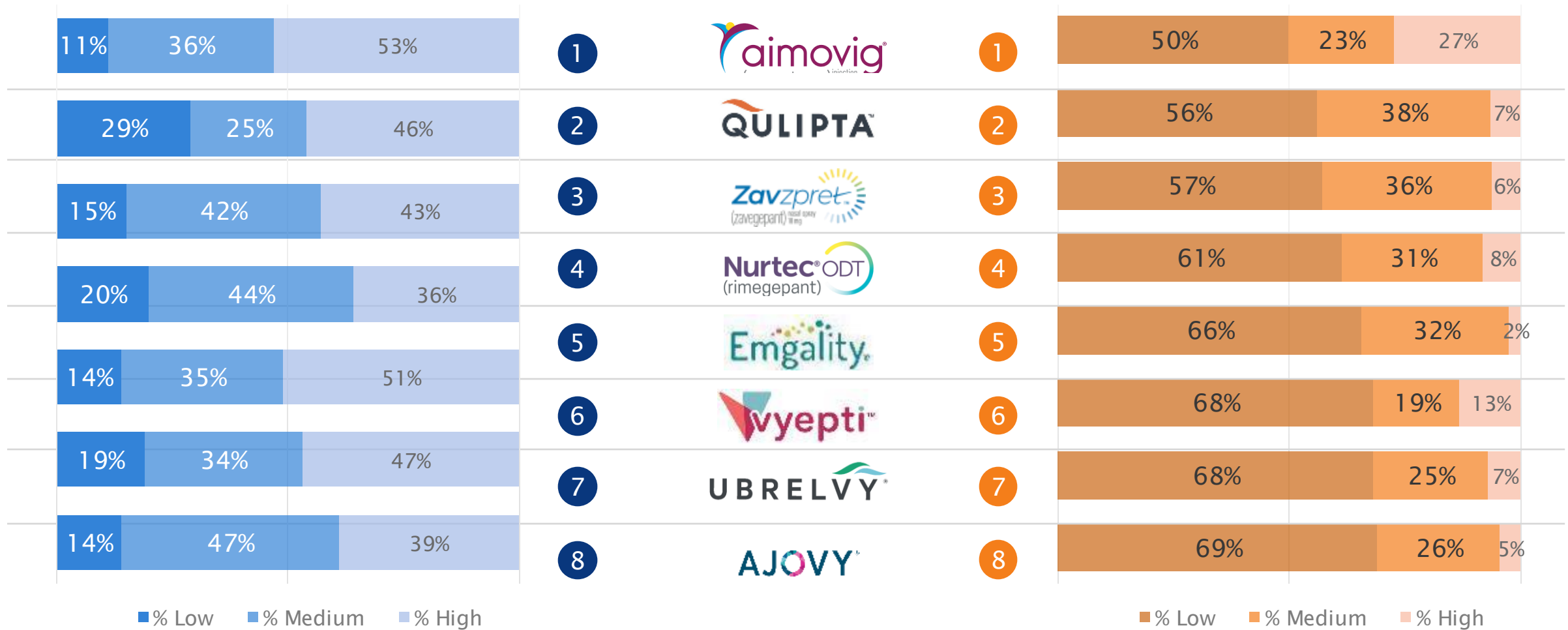
CONVERSATIONS

PATIENT CENTRICITY (VALUE)

PATIENT CENTRICITY (%)

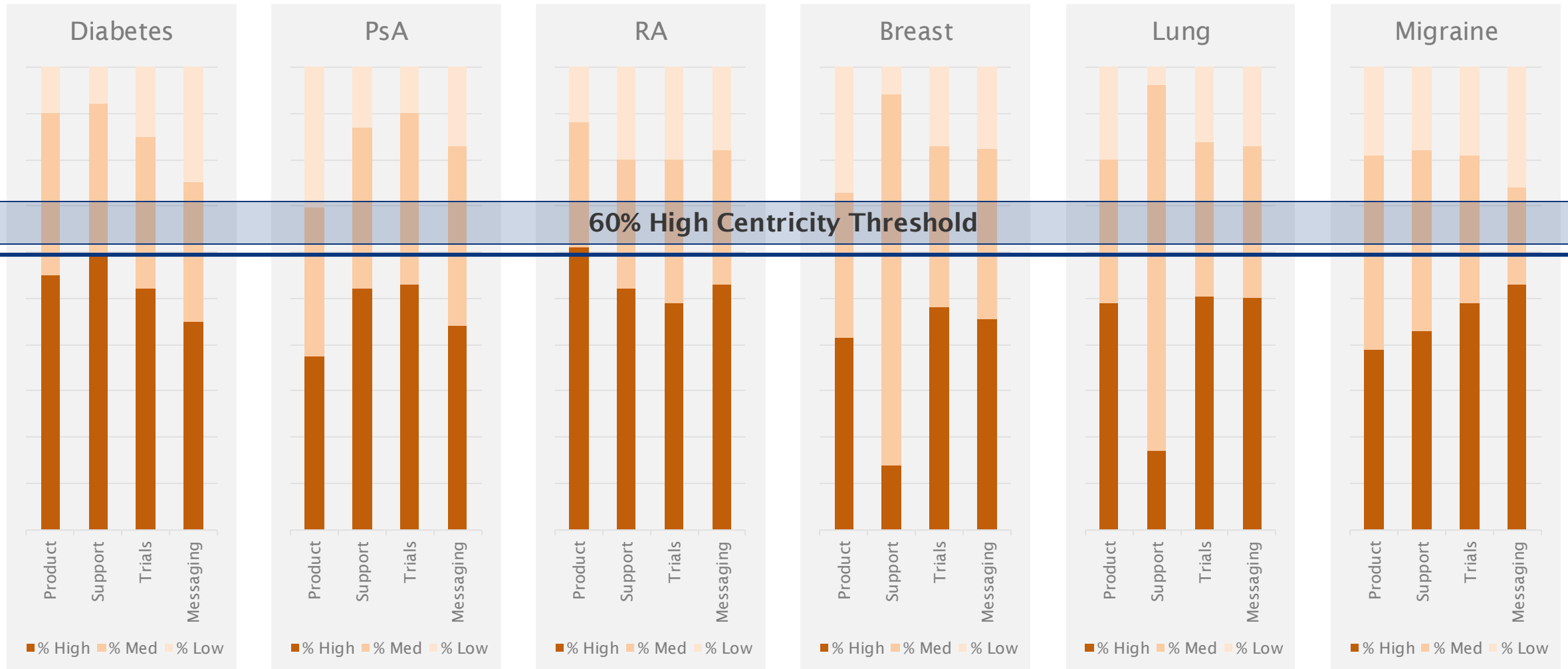
	PATIENT CENTRICITY (VALUE)			PATIENT CENTRICITY (%)											
	Low	Med	High	0%	10%	20%	30%	40%	50%	60%	70%	80%	90%	100%	
PRODUCT RELATED	Efficacy Conversations	20%	27%	53%											
	Safety/SE Conversations	25%	32%	43%											
	Dosing Conversations	22%	19%	59%											
	Product Design Conversations	33%	27%	40%											
SUPPORT RELATED	Financial Support	32%	33%	35%											
	Nurse Hotline Support	27%	32%	41%											
	Delivery/Shipping Support	28%	33%	39%											
TRIAL RELATED	Trial Information	23%	35%	42%											
	Trial Registration	18%	34%	48%											
	Trial Experience	17%	31%	52%											
COMMUNICATION RELATED	Website Related	26%	34%	40%											
	TV Ad Related	31%	32%	37%											
	All Other Media Related	29%	30%	41%											
	Social Media Related	18%	37%	45%											

Migraine – Brand Level Patient Centricity



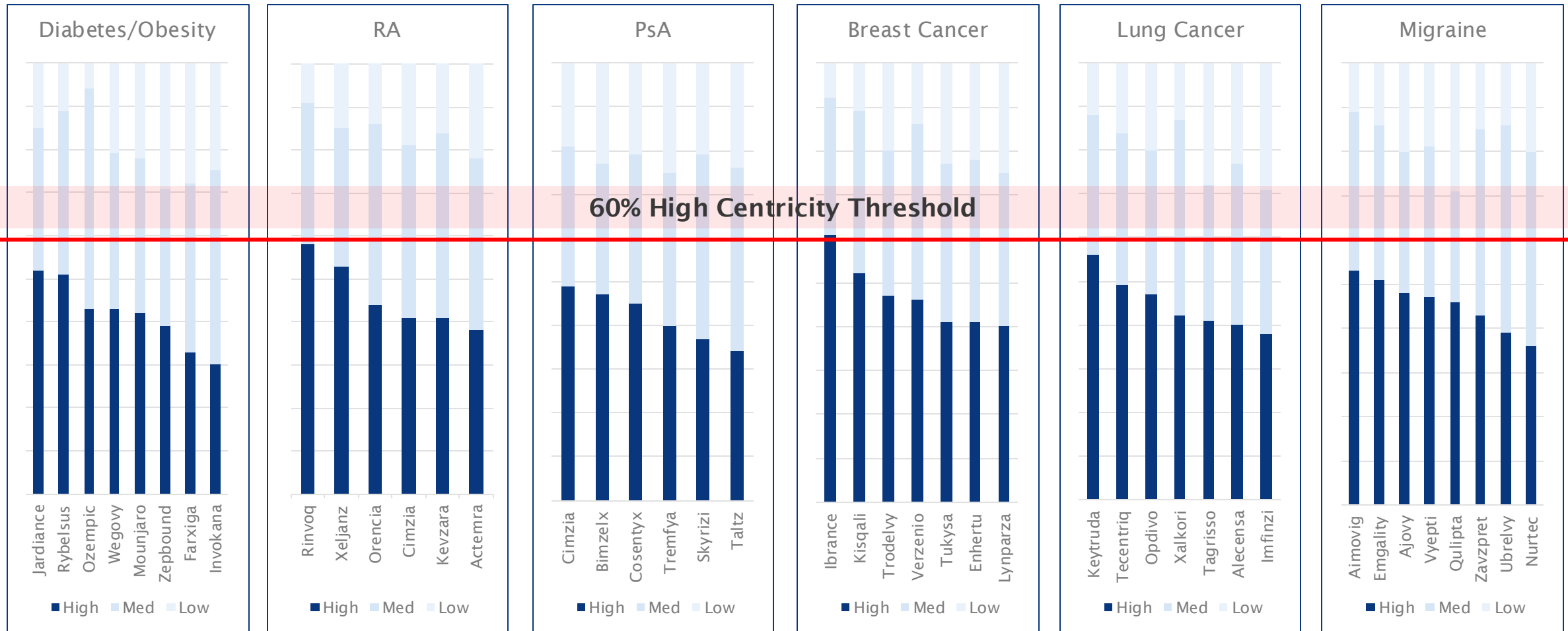
Summary – Centricity in Patient Conversations

Patient centricity varies significantly by topic of patient conversation, both within a disease state and across disease states. Improving patient centricity scores will require more than taking control of social media narratives.



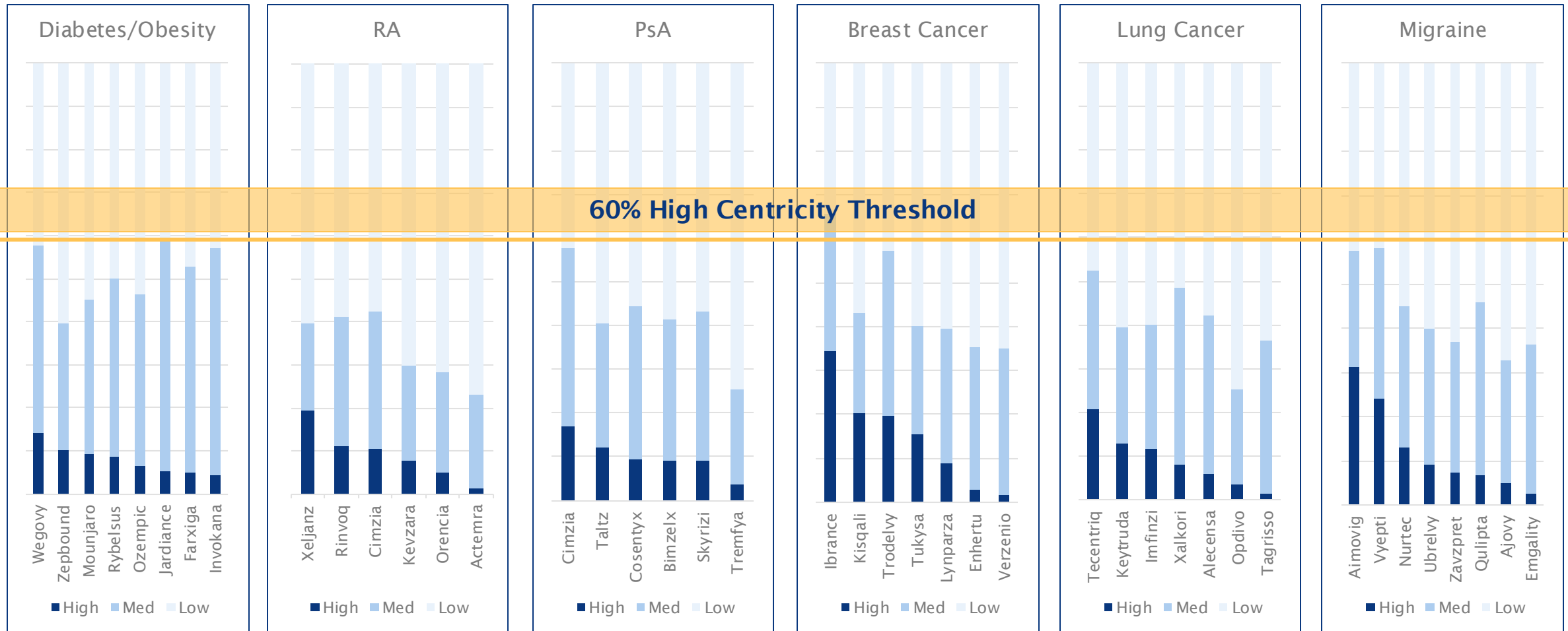
Summary – Patient Centricity in Brand Discussions

Patient centricity in brand conversations in a disease state also varies significantly across brands. Very few brands are currently close to achieving the 60% High Centricity threshold in patient conversations and there is significant room for improvement.



Summary – Patient Centricity in Brand Messaging

Patient centricity in brand messaging is low across all disease states and very few brands can reach threshold levels of high centricity in their messaging.



Learn more about patient centricity in your disease state



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Exactly how patient centric is your brand?

Measuring patient centricity across
6 disease states and 40+ brands using social
listening and machine learning algorithms

Contact us today

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