a precision value & health team

The webinar series

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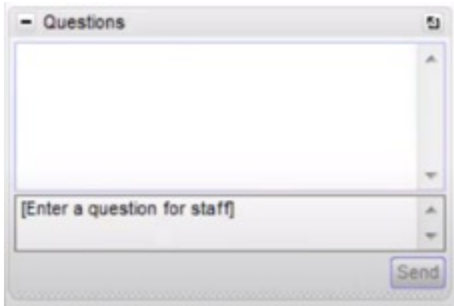
Omnichannel for Payers: A big opportunity for pharma

November 16th, 2022

Ground rules

- This webinar will take max **60 minutes**, followed by questions
- You can submit **questions** at any time via the "Questions" box



- **Please give us your feedback!**
  - Right after the webinar a short satisfaction survey will be launched. We would love to know your opinion!

- The webinar will be **recorded** and made available after the session. We will send you an email with the details

ACROSS HEALTH

Why are you here?

Quick poll question:

How comfortable are you with the concept of an omnichannel approach for payers?

Not at all	Not completely	Somewhat	Mostly	Completely

Want to know **the best** way to engage with your Payer audiences?

Let them tell you!

Poll

What percentage of US payers prefer an omnichannel approach?

- 28%
- 48%
- 68%
- 88%

The questions we will address in this webinar…

1. What are the trends impacting on Payers?
2. What are the Omnichannel opportunities for Pharma to better serve and impact Payers?
3. Which online (digital) and offline (traditional F2F) channels will support improvement of overall reach and impact within your Omnichannel plan?
4. Which services and resources do Payers want and in which way do they want it?
5. When and how do Payers want support for upcoming launches?
6. Where can you improve compared to your competitors on overall Cx as well as at channel level?

1.
What are the trends impacting on Payers?

Omnichannel for payers needs to take into account all these trends to ensure success

OMNICHANNEL VS TRADITIONAL

COVID-19

INFORMATION OVERLOAD

MULTI-STAKEHOLDER

Current challenges facing the industry

COVID-19

The impact of COVID-19

Reduced share of mind

The impact of COVID-19

Reduced share of mind

Backlog

The impact of COVID-19

Reduced share of mind

Backlog

Change in interaction preferences

Current challenges facing the industry

MULTI-STAKEHOLDER

The challenge of multiple payer stakeholders


Payer – procurement


Physicians

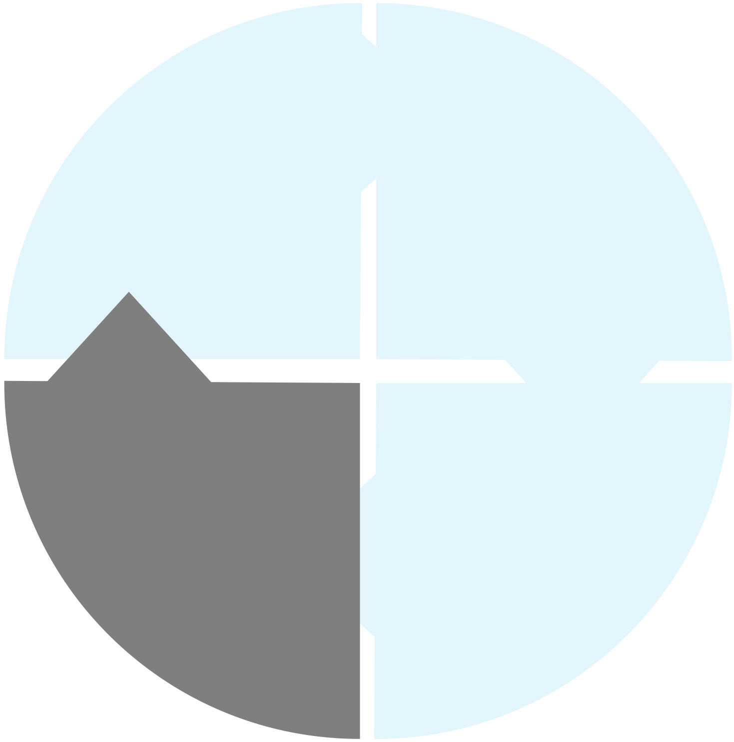

Pharmacy leads


Regional/Local decision makers


Hospital directors


Other HCPs i.e. Nurse, Laboratory

Current challenges facing the industry



INFORMATION OVERLOAD

MEDICAL DATA EXPLOSION

Medical knowledge is expanding faster than our ability to assimilate and apply it effectively

The doubling time of medical knowledge in 1960 was 50 years; in 1980: 7 years; and in 2010: 3.5 years

In 2020, it was projected to be just 73 days[1]

1. Denson et al. Trans Am Clin Climatol Assoc. 2011; 122: 48–58

DIGITAL VS TRADITIONAL

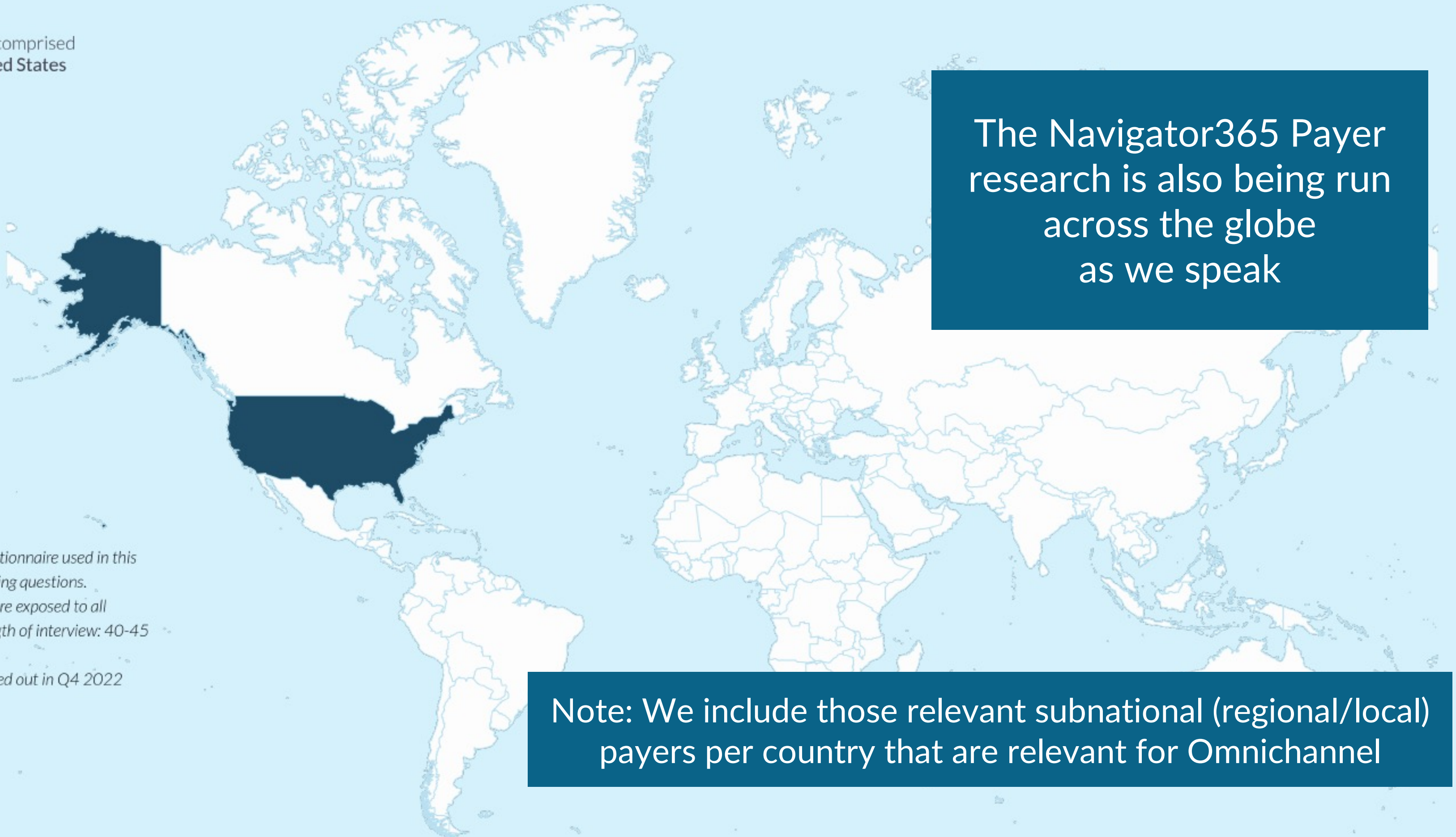
2.
What are the Omnichannel opportunities for Pharma to better serve and impact Payers?

We recently ran Navigator365 Payer research in the US to gain insights on channel reach/impact, content/services, 3rd party usage and benchmarking

MARKET – PAYER UNITED STATES

N=167

The survey sample comprised
167 Payers in United States



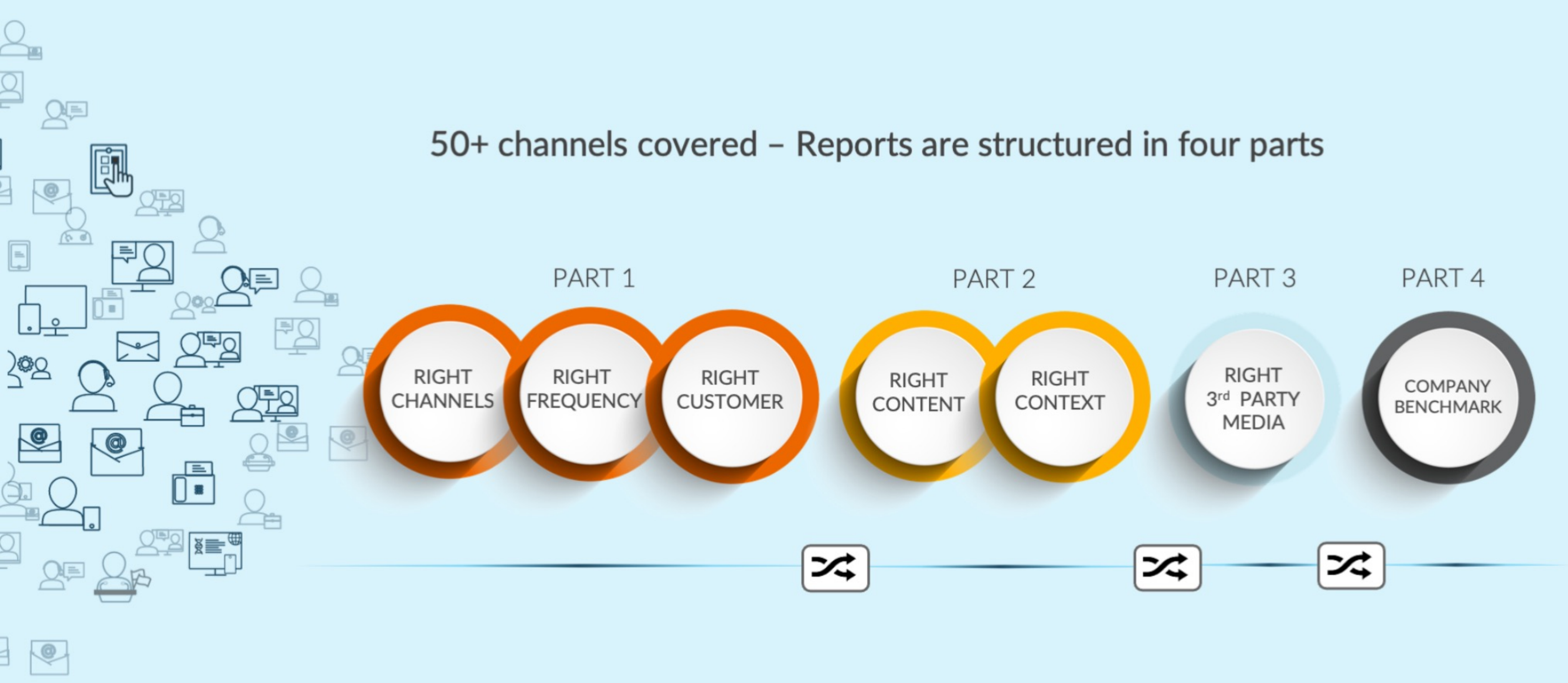
The Navigator365 Payer research is also being run across the globe as we speak

For relevance, the questionnaire used in this survey included screening questions. Not all respondents were exposed to all questions. Average length of interview: 40-45 minutes.
The research was carried out in Q4 2022

Note: We include those relevant subnational (regional/local) payers per country that are relevant for Omnichannel

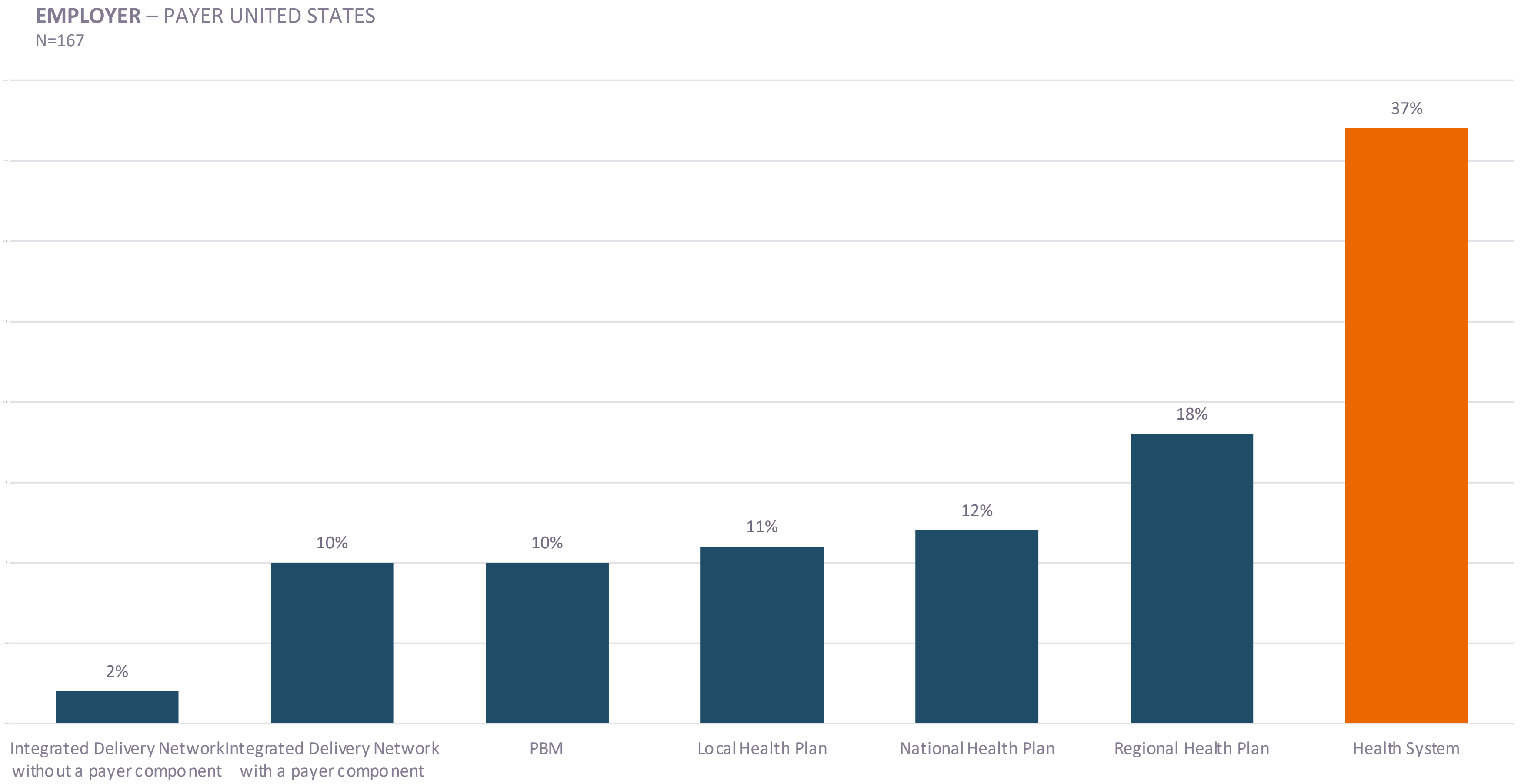
Source: Navigator365™ **Payer**

Today we will cover some highlights from the four Parts of the Navigator365 Payer insights



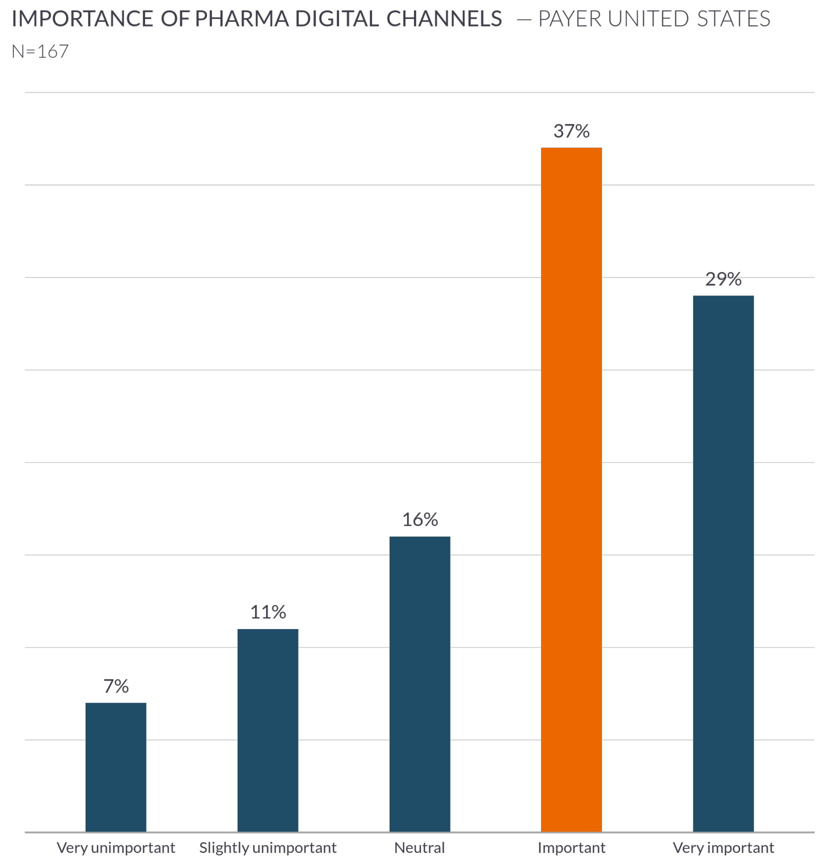
Source: Navigator365™ Payer

A representative sample of 167 US payers across employers and roles



Source: Navigator365™ Payer

Digital channels are important to Payers: 62% rate them as (very) important



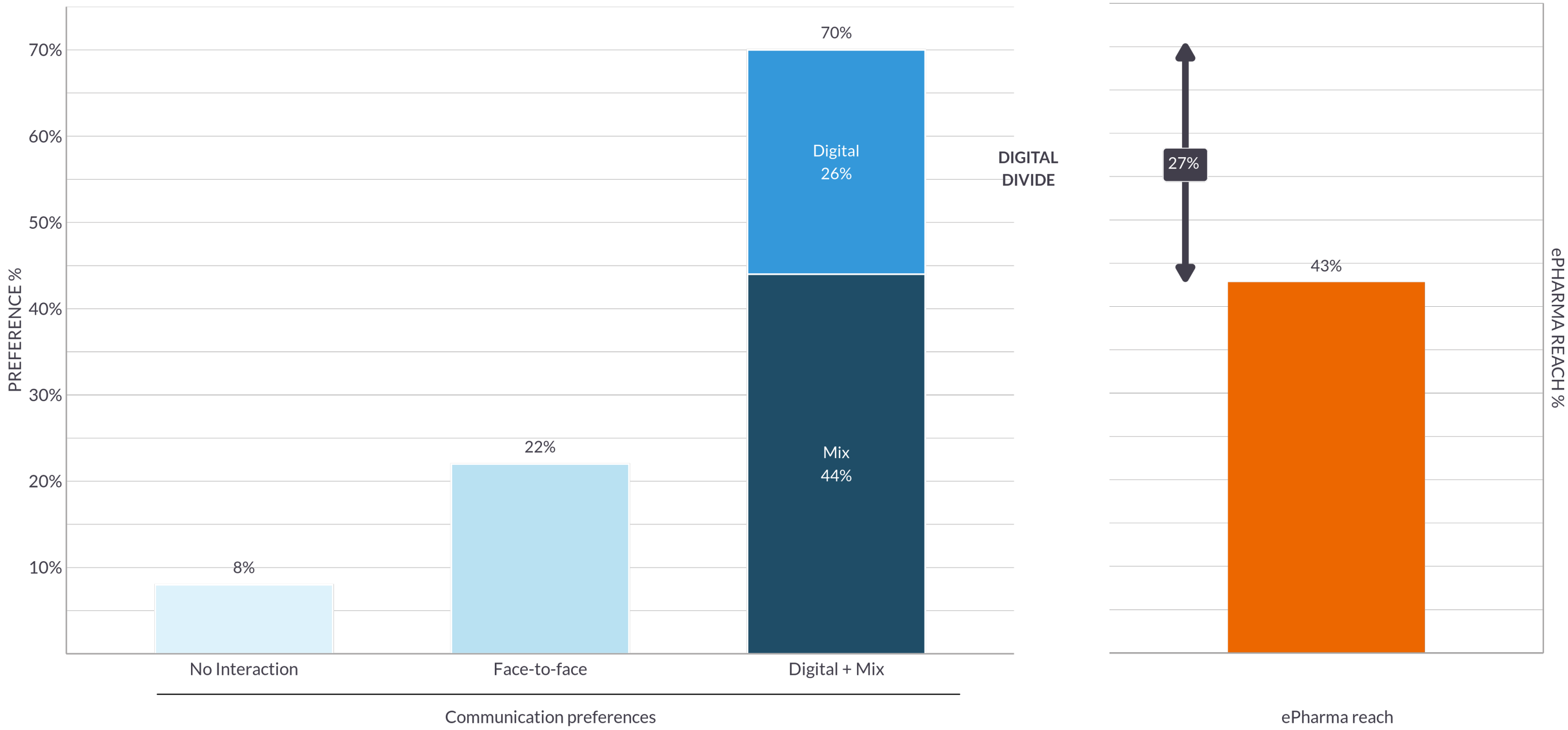
Importance of pharma digital channels to respondents on a 0-10 scale
Score grouping: Very important = 9-10; important = 7-8;
neutral = 5-6; slightly unimportant = 3-4; very unimportant = 0-2

Source: Navigator365™ Payer

While 70% of Payers want Digital-only or a mix of Digital + F2F, the reach of the top digital channels is only 43% creating a large opportunity to close the Digital Divide

DIGITAL DIVIDE — PAYER UNITED STATES

N=167

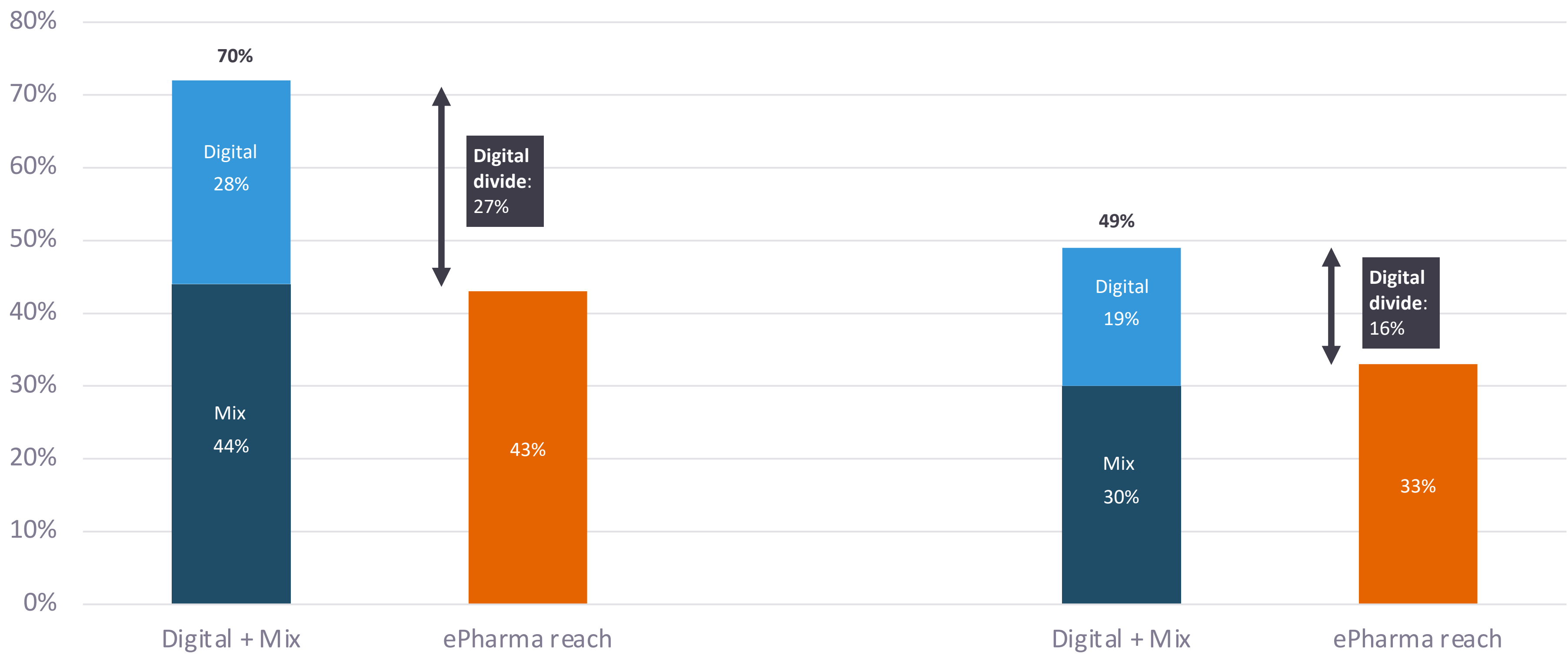


The Digital Divide is defined as the delta between the % of respondents preferring digital or mix and the average % reach of the top 3 online promo and medical channels ('epharma reach')

Source: Navigator365™ Payer

In contrast, 49% of 2,060 US specialists want Digital-only or a mix of Digital + F2F

The reach of the top digital channels is 33%. Meaning there is a greater demand and gap for promotional engagement with payers vs specialists.



PAYER – UNITED STATES
N=167

SPECIALISTS – UNITED STATES
N=2,060

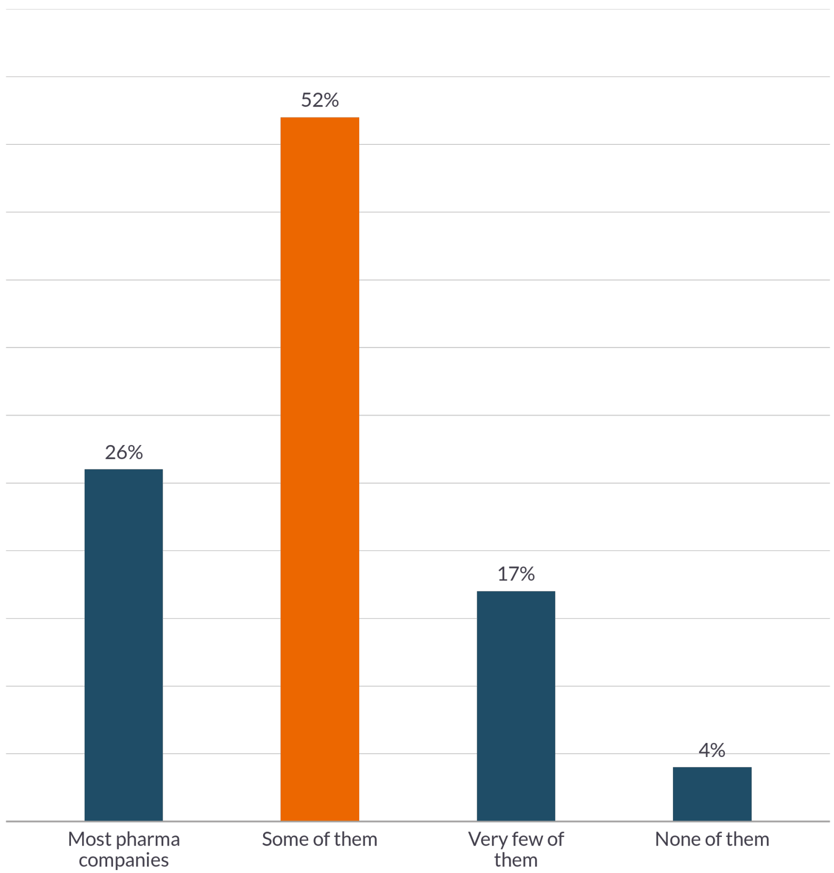
Specialist data source: Navigator365™ **Core**

Source: Navigator365™ **Payer**

And only 26% of Payers say that most Pharma companies are delivering relevant content

RELEVANT CONTENT FROM PHARMA – PAYER UNITED STATES

N=167



% among respondents

Source: Navigator365™ Payer

3.
Which online (digital) and offline (traditional F2F) channels will support improvement of overall reach and impact within your Omnichannel plan?

We cover the reach, impact and frequency of over 50 channels across Promo, Medical, Paid and Earned

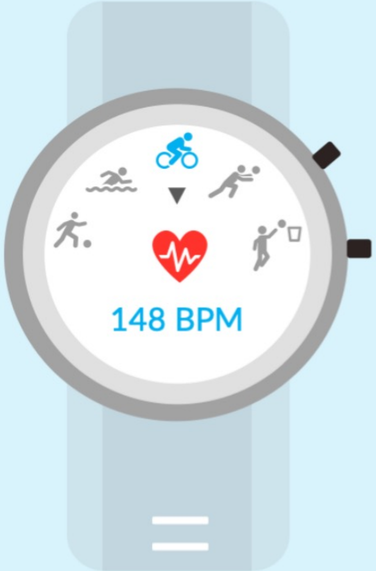
Source: Navigator365™ Payer

To compare impact- of channels, we apply the MultiChannel eQuivalent (MCQ) approach

Comparing impact

...of various sports »

Heart rate (BPM)
as single common measure



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Comparing impact

...of various marketing channels

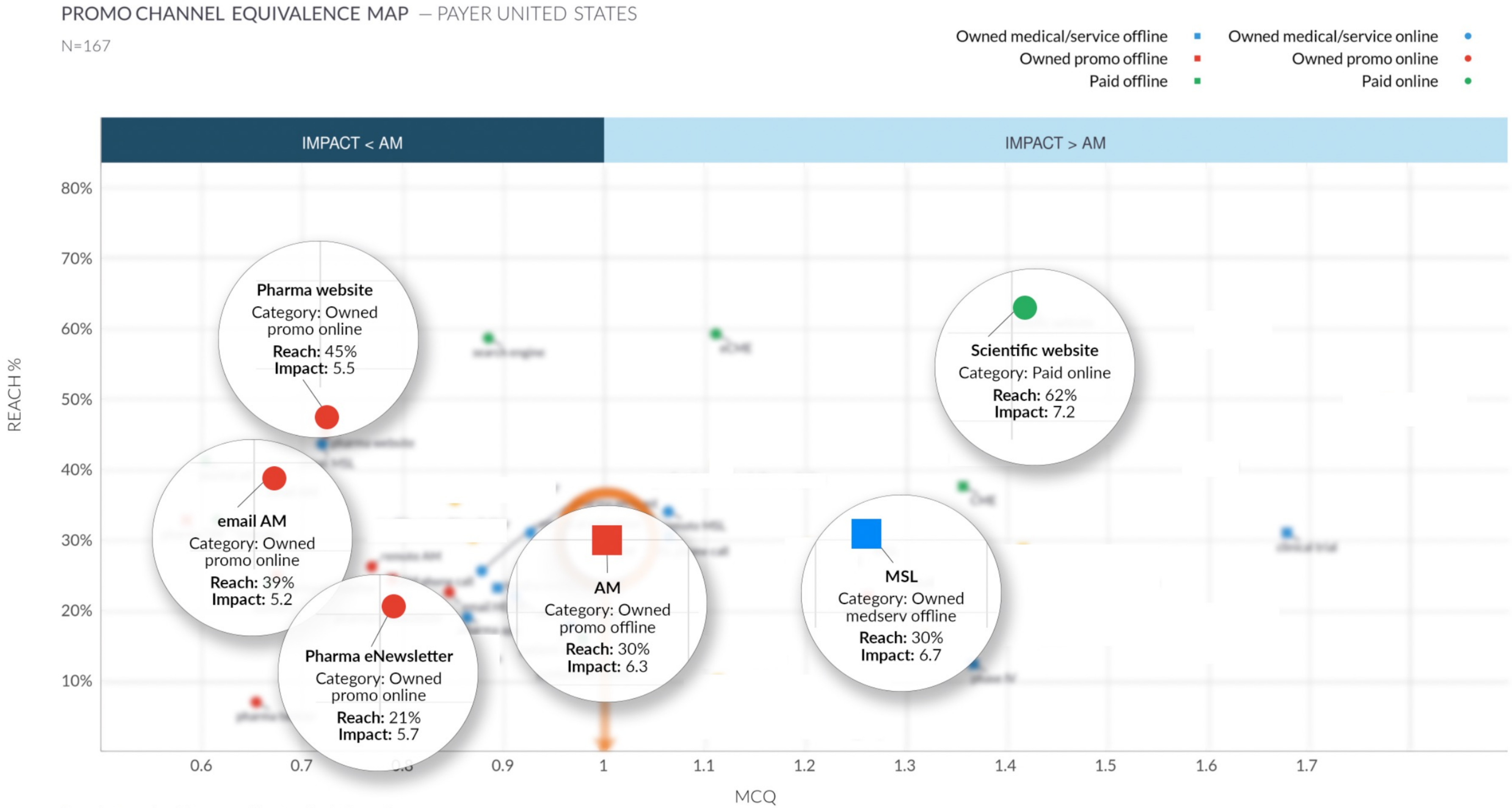
MultiChannel eQuivalent (MCQ)
as single common measure

MCQ =
the relative impact
of a channel interaction
as compared to the impact of
1 AM face-to-face visit*

* For educational channels: ...of 1 MSL face-to-face visit

Source: Navigator365™ Payer

We can see some medical channels having high impact, while other promo and medical channels offer higher reach with still decent impact



Proprietary algorithms recalibrate all relative values

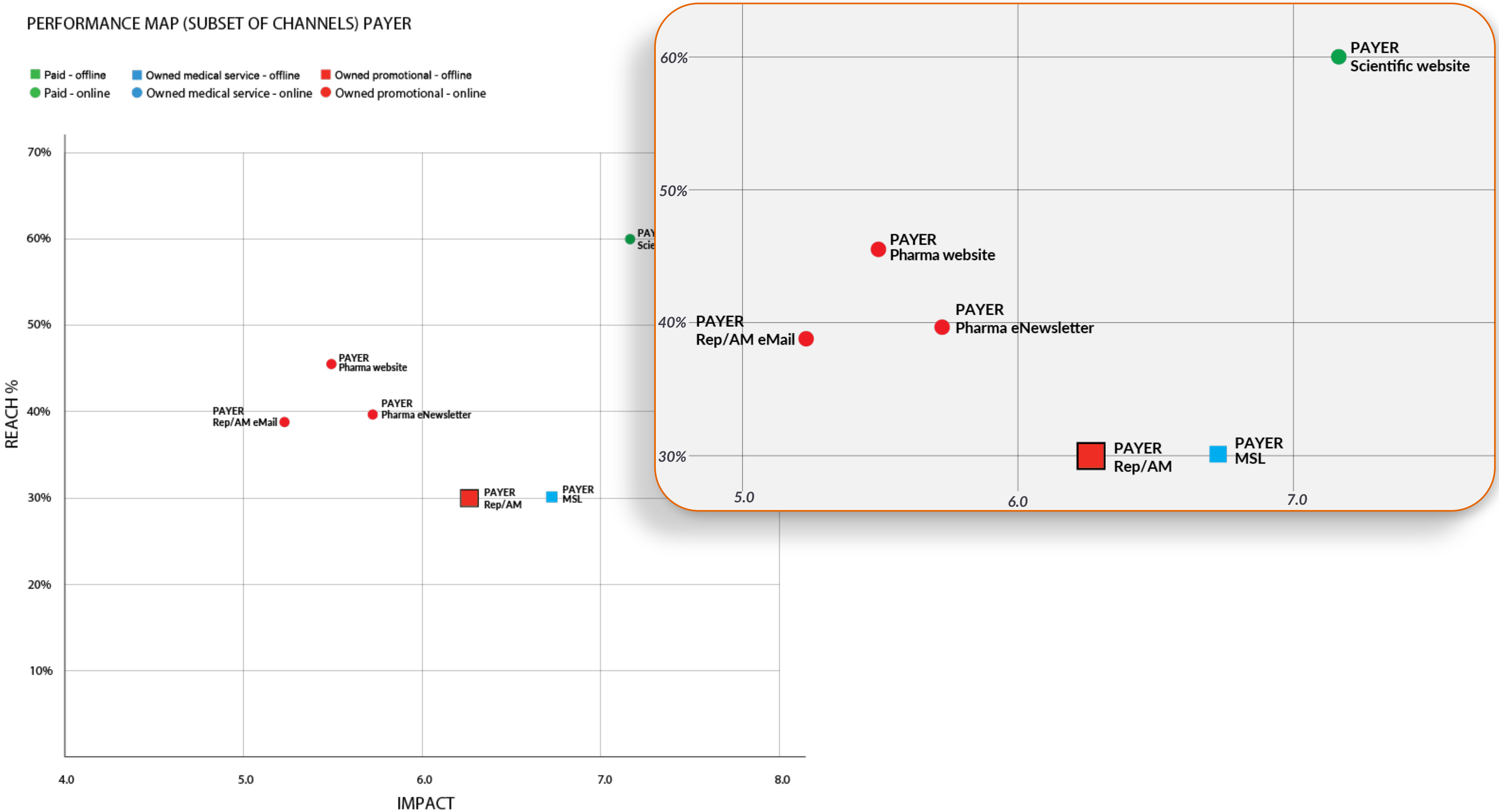
Source: Navigator365™ Payer

Poll

Do channels have a greater impact with US specialists or payers?

- Greater with specialists
- Greater with payers
- The same, depends on the channel

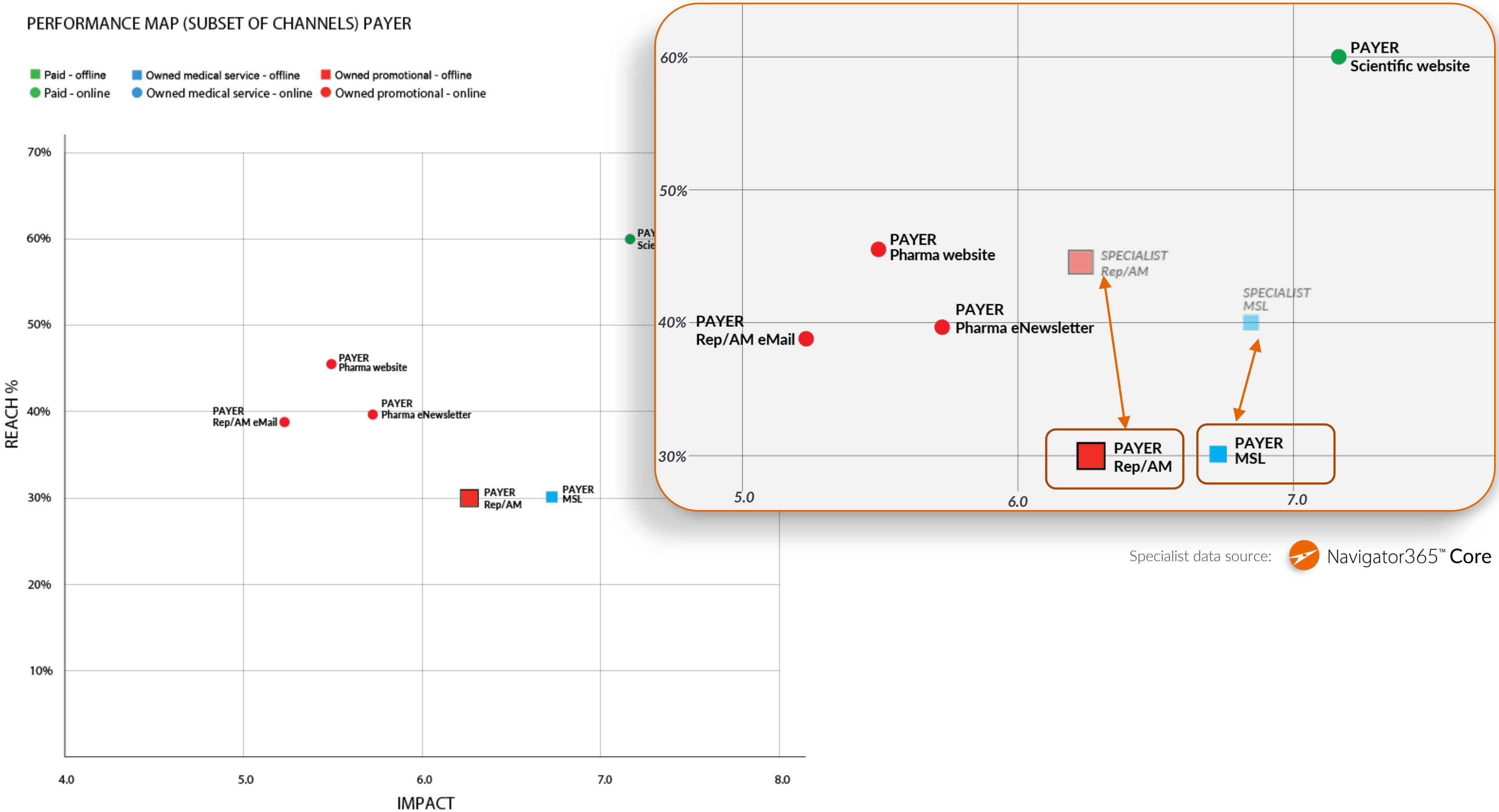
When comparing with 2,060 US specialists, it's clear some of the digital channels have a comparable impact with Payers, but there is room to increase engagement



Source: Navigator365™ Payer

When comparing with 2,060 US specialists, it's clear some of the digital channels have a comparable impact with Payers, but there is room to increase engagement

PERFORMANCE MAP (SUBSET OF CHANNELS) PAYER



Specialist data source: Navigator365™ Core

Source: Navigator365™ Payer

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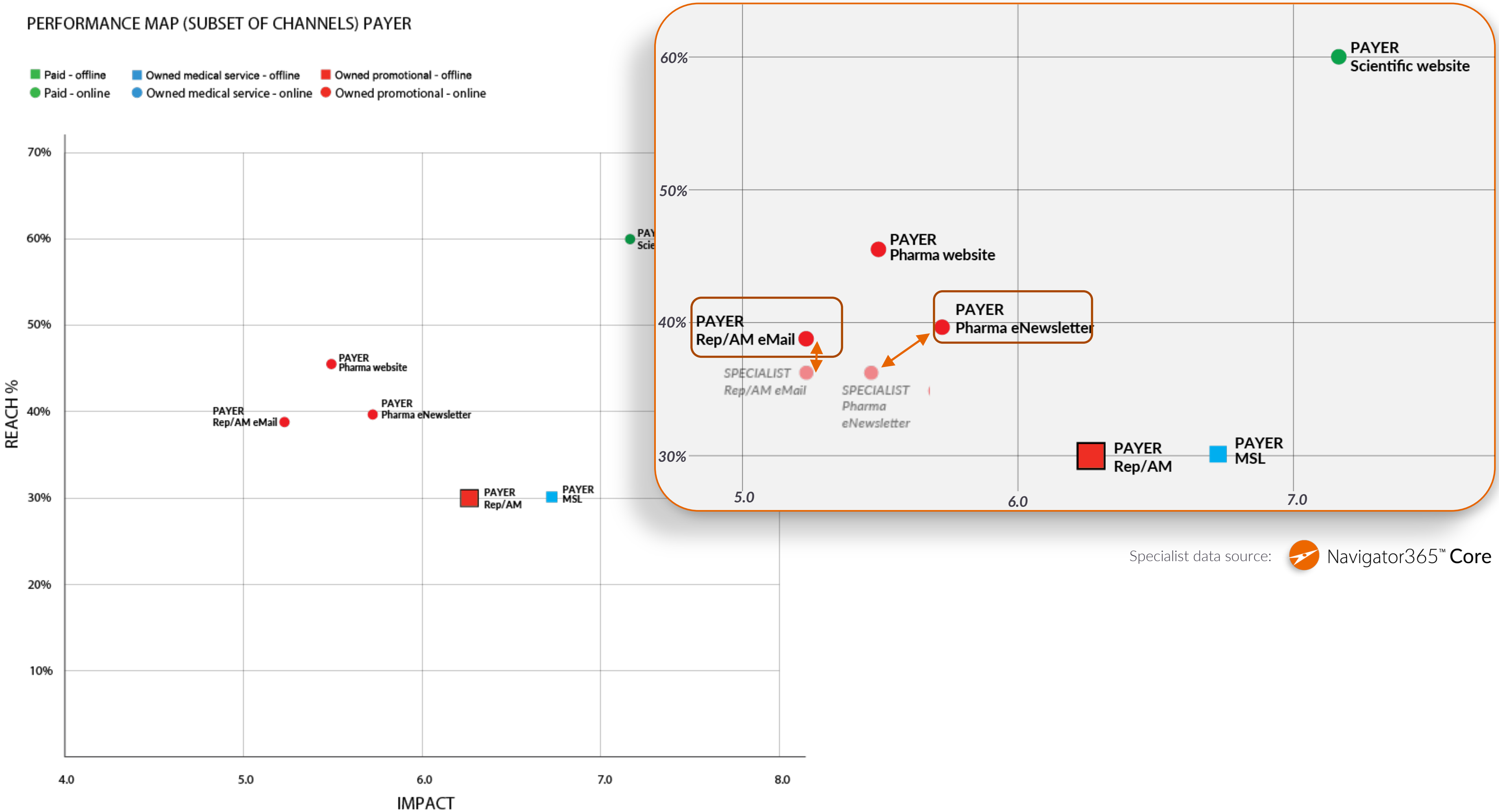

Specialist data source: Navigator365™ Core

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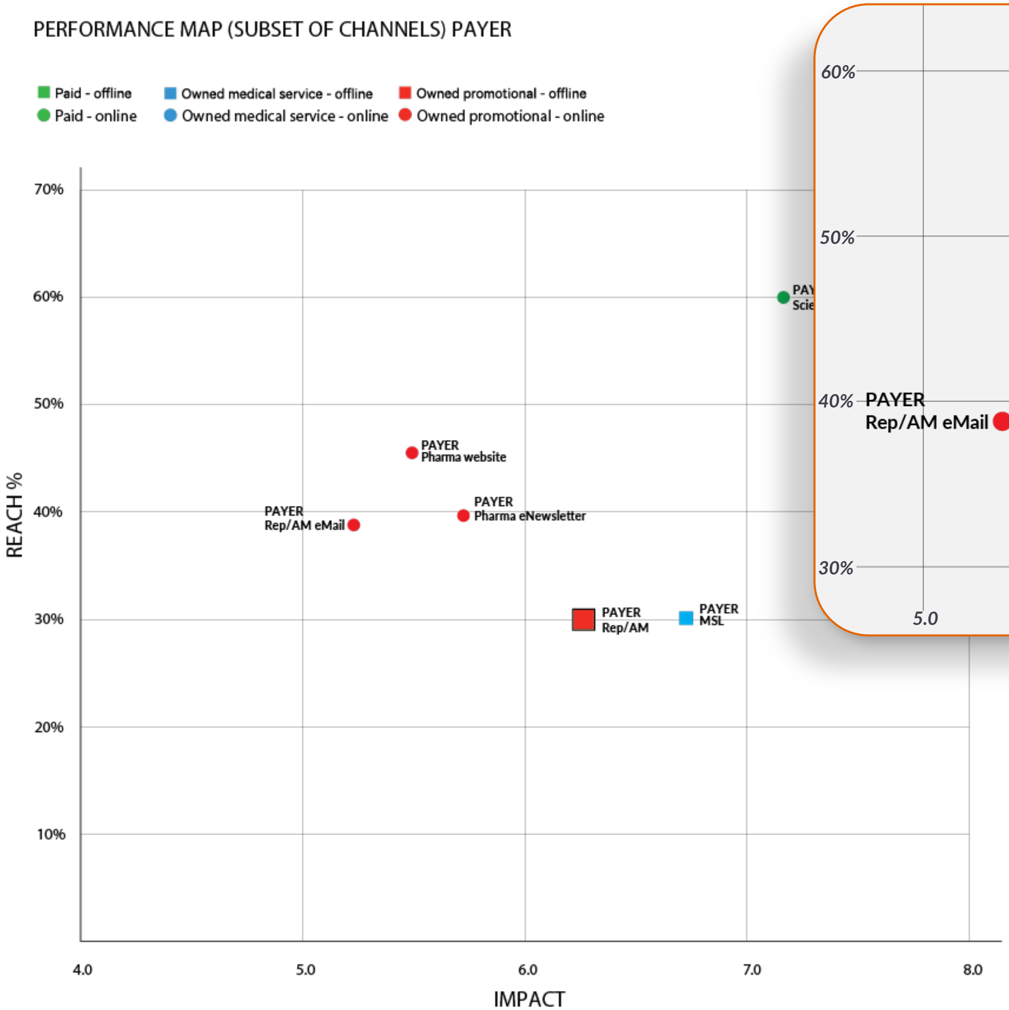
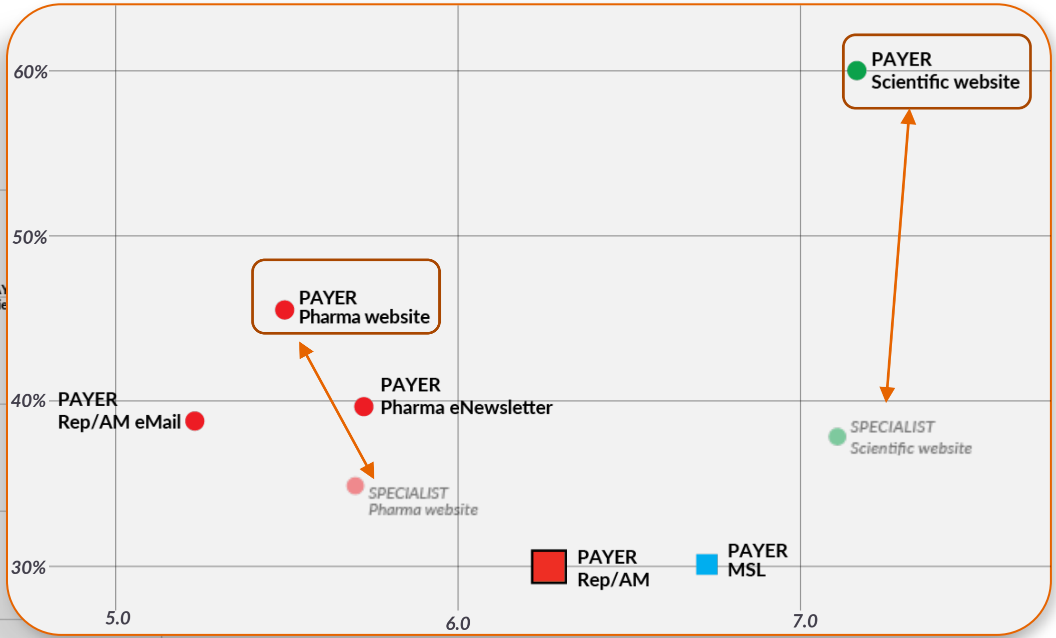


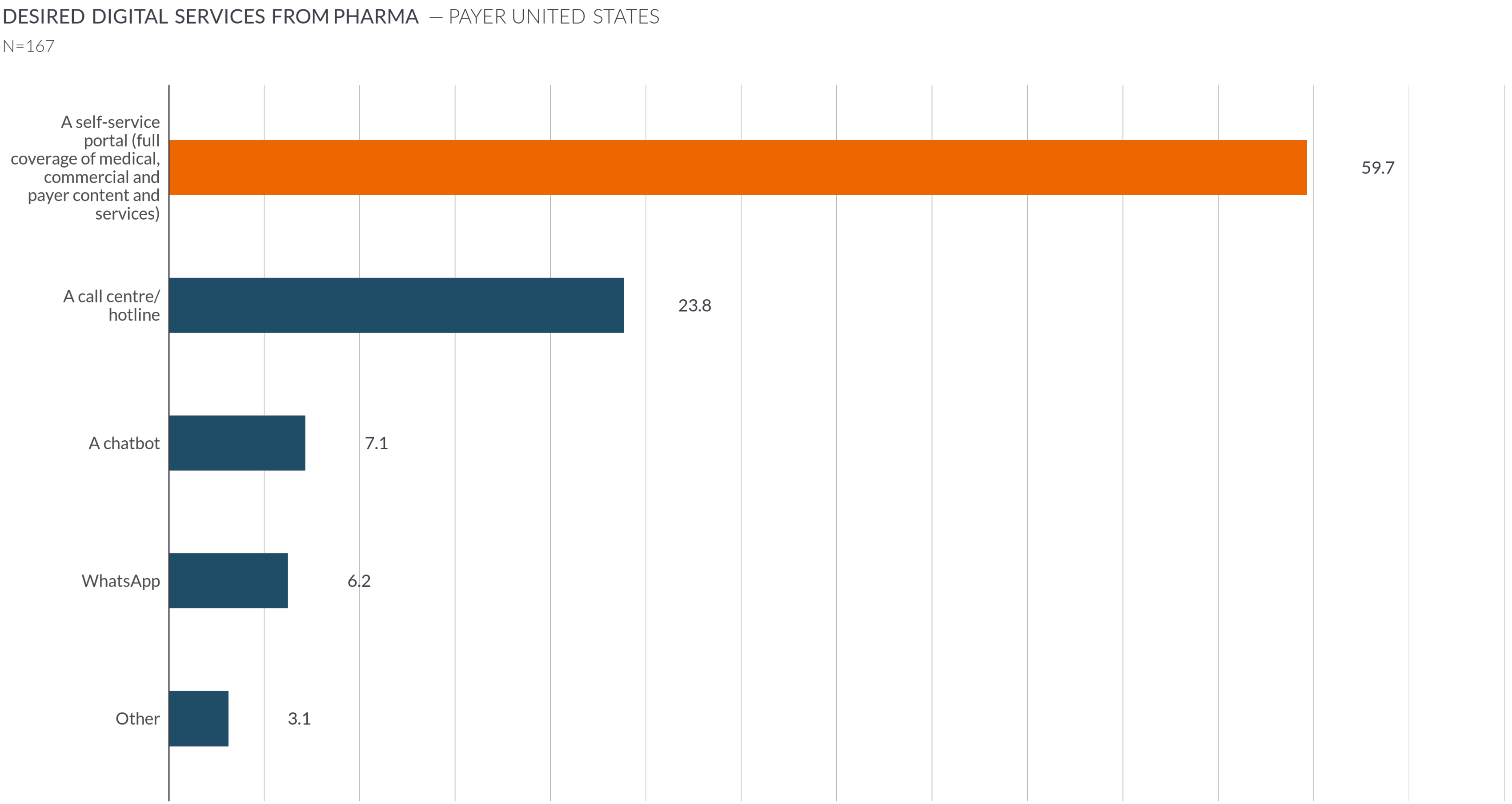


Specialist data source: Navigator365™ Core

Source: Navigator365™ Payer

4.
Which services and resources do Payers want and in which way do they want it?

Self-service portals supported by content and services rated as highest importance when it comes to digital channels



Respondents were asked to distribute 100 points to no more than 3 options
Score = sum of points averaged among respondents

Source: Navigator365™ Payer

Poll

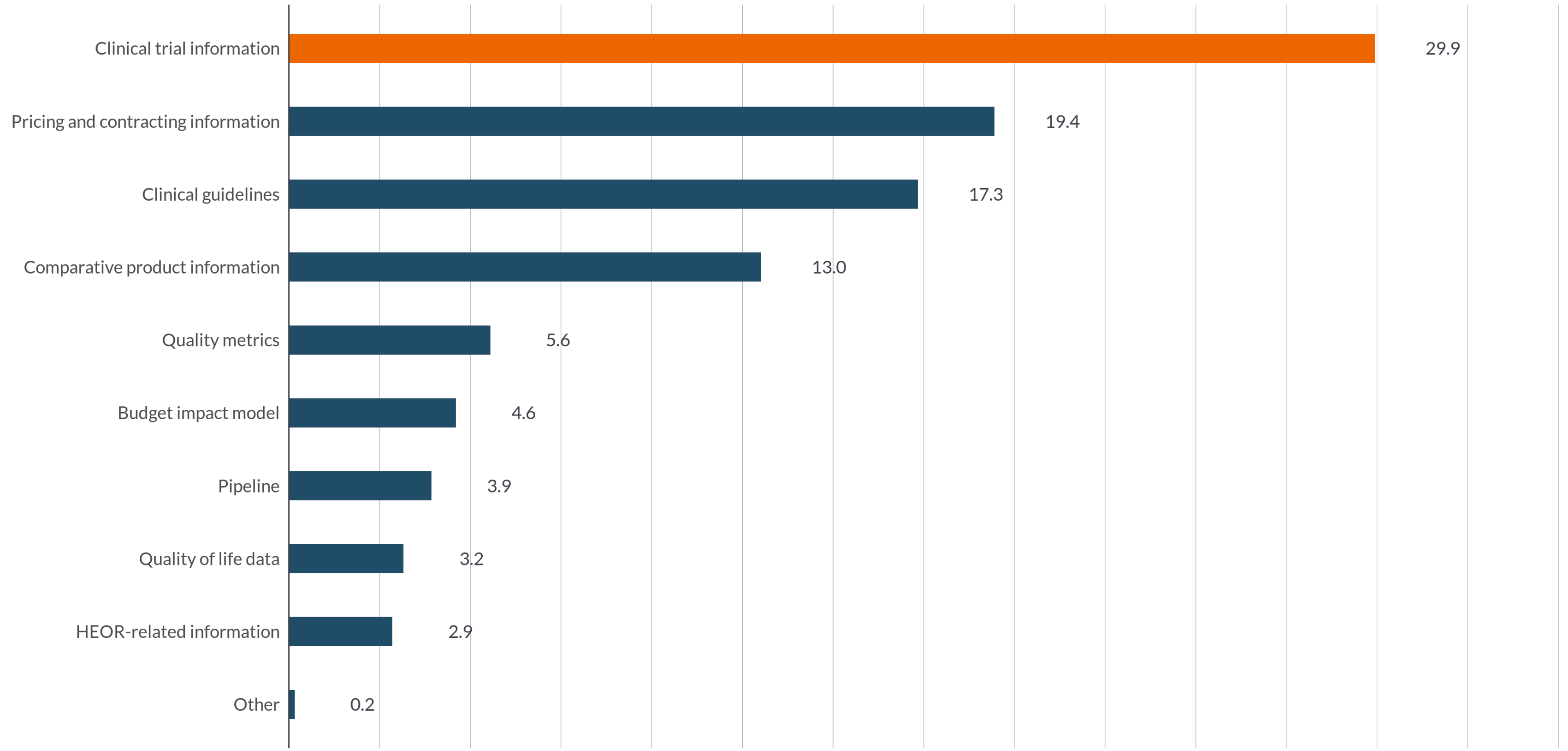
What is the most valuable resource from pharma for payers?

- Clinical trial information
- Pricing and contracting information
- Clinical guidelines
- Comparative product information

Overall from pharma, clinical trial info even more important vs. pricing/contracting

MOST VALUABLE RESOURCES FROM PHARMA — PAYER UNITED STATES

N=167



Respondents were asked to distribute 100 points to no more than 3 options

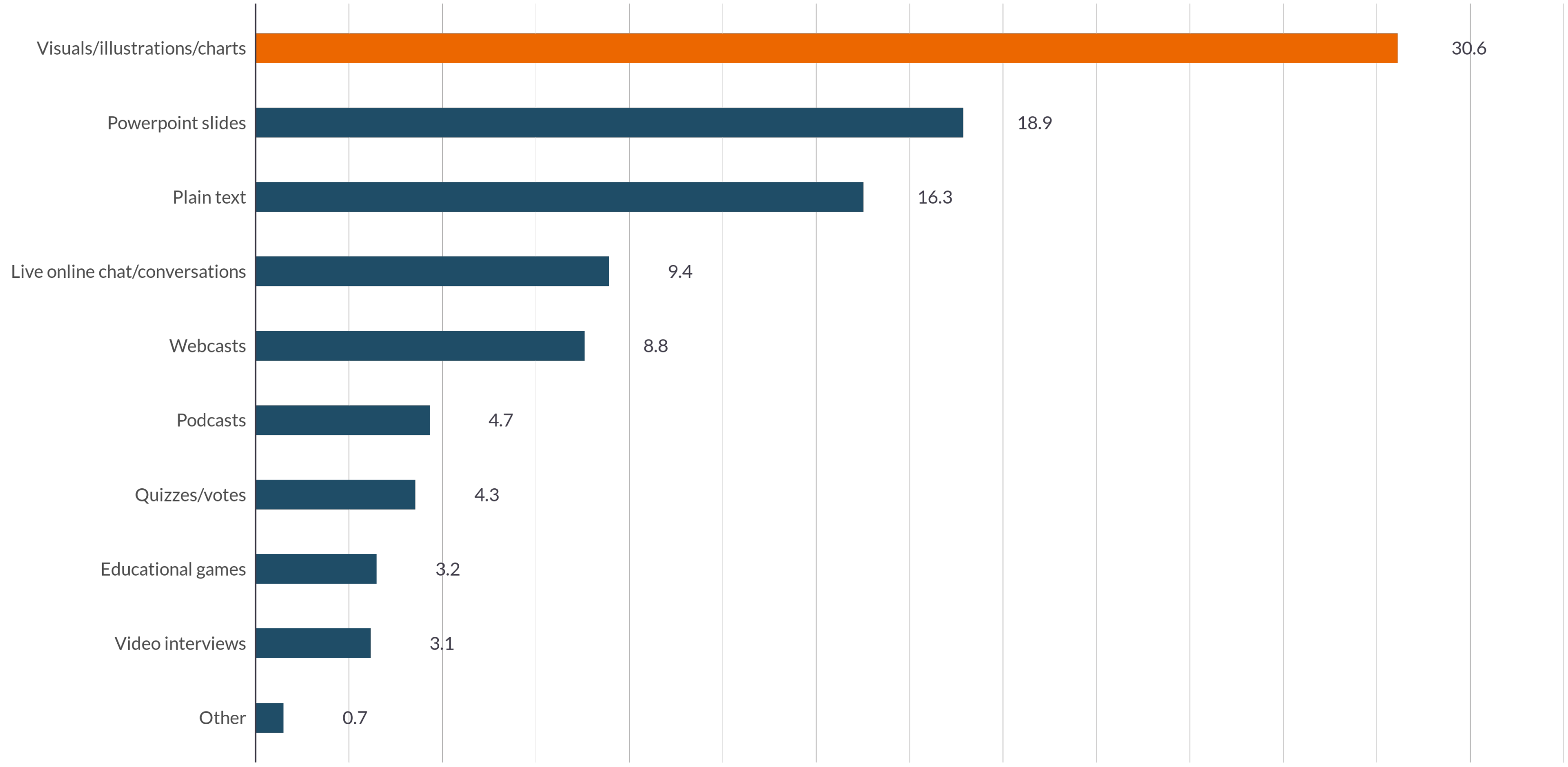
Score = sum of points averaged among respondents

Source: Navigator365™ Payer

Visuals and charts are the leading formats followed closely by textual summaries

PREFERRED DIGITAL FORMAT – PAYER UNITED STATES

N=167



Respondents were asked to distribute 100 points to no more than 3 options

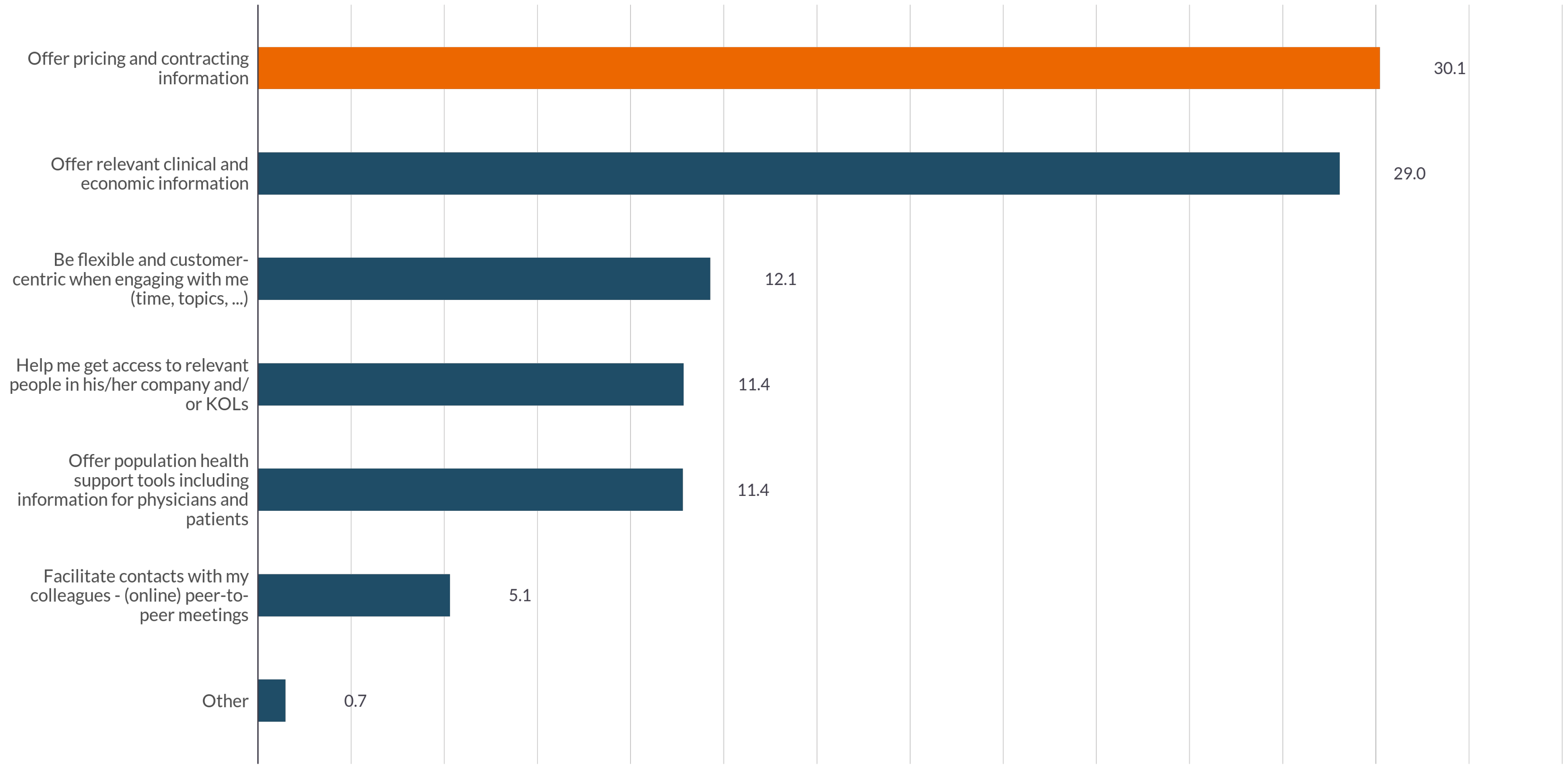
Score = sum of points averaged among respondents

Source: Navigator365™ Payer

When it comes to the market access AM specifically, pricing and clinical/economic information is the most desired

MOST VALUABLE CONTRIBUTION OF AM – PAYER UNITED STATES

N=167



Respondents were asked to distribute 100 points to no more than 3 options

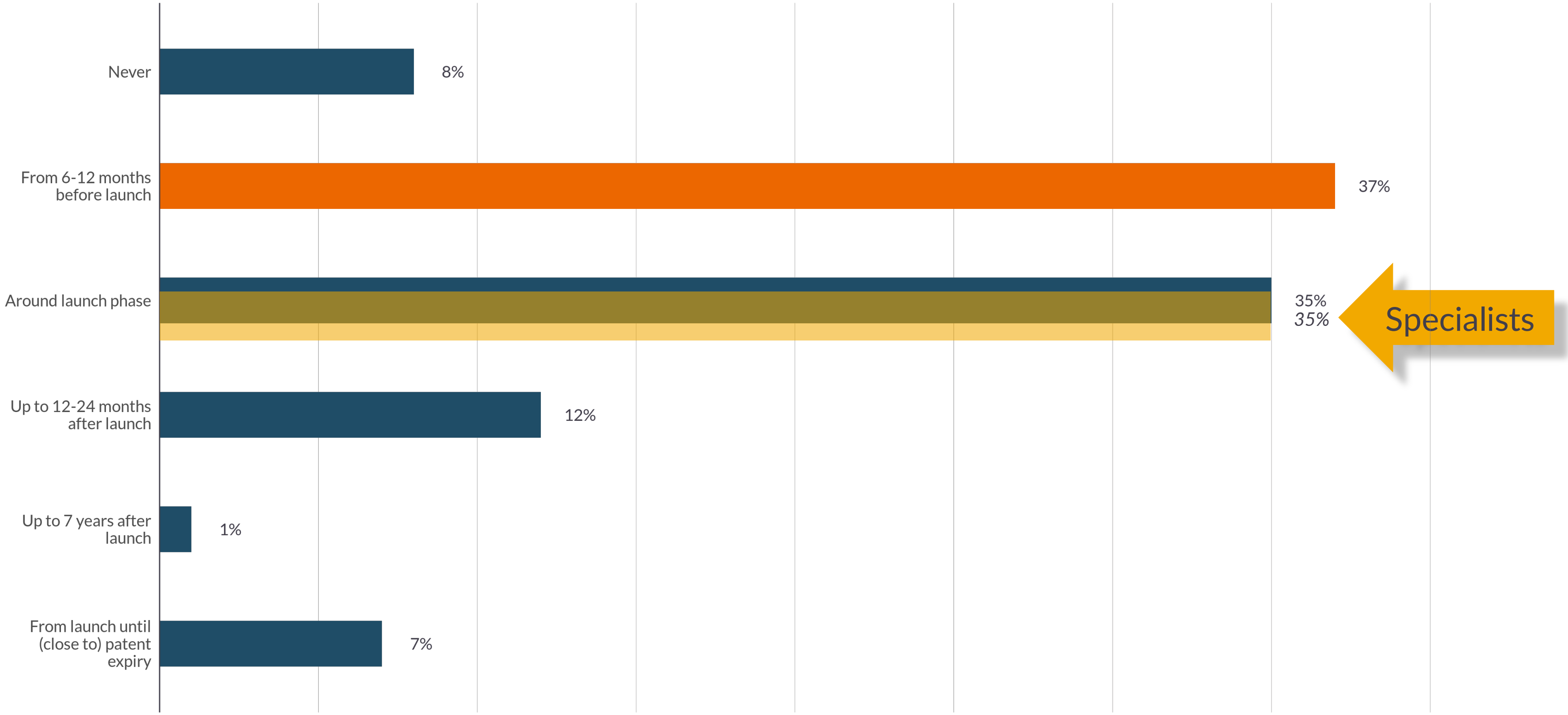
Score = sum of points averaged among respondents

Source: Navigator365™ Payer

5.
When and how do Payers want support for upcoming launches?

Payers want info before and around the time of product launch

PREFERRED PERIOD FOR PAYER-RELATED INFO FROM PHARMA — PAYER UNITED STATES
N=167

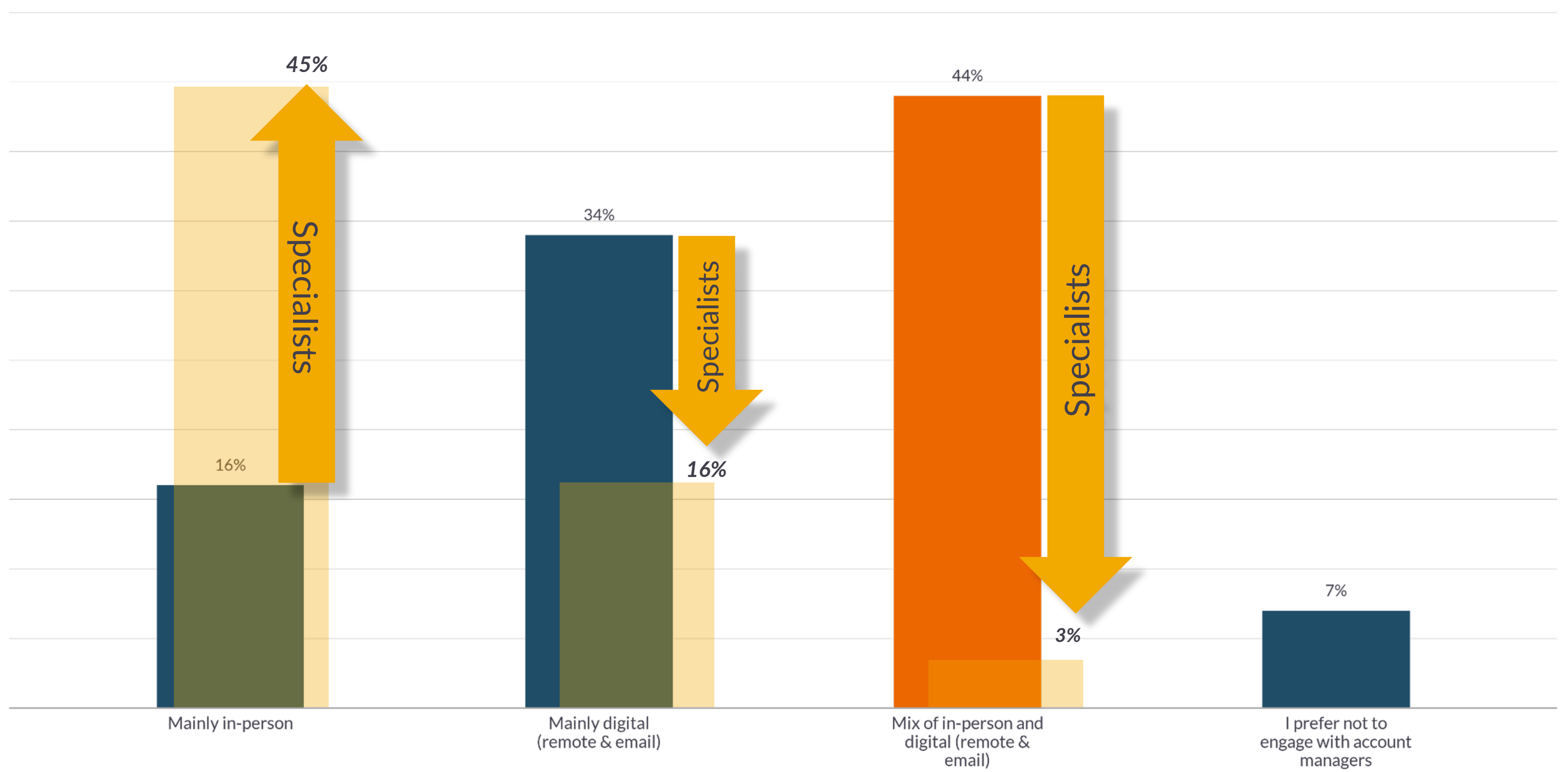


% among respondents

Source: Navigator365™ Payer

When it comes to the market access AM and launch, a mix of F2F remote and email is desired

ACCOUNT MANAGER FORMAT IN LAUNCH SETTING — PAYER UNITED STATES
N=167



% among respondents

Source: Navigator365™ Payer

6.

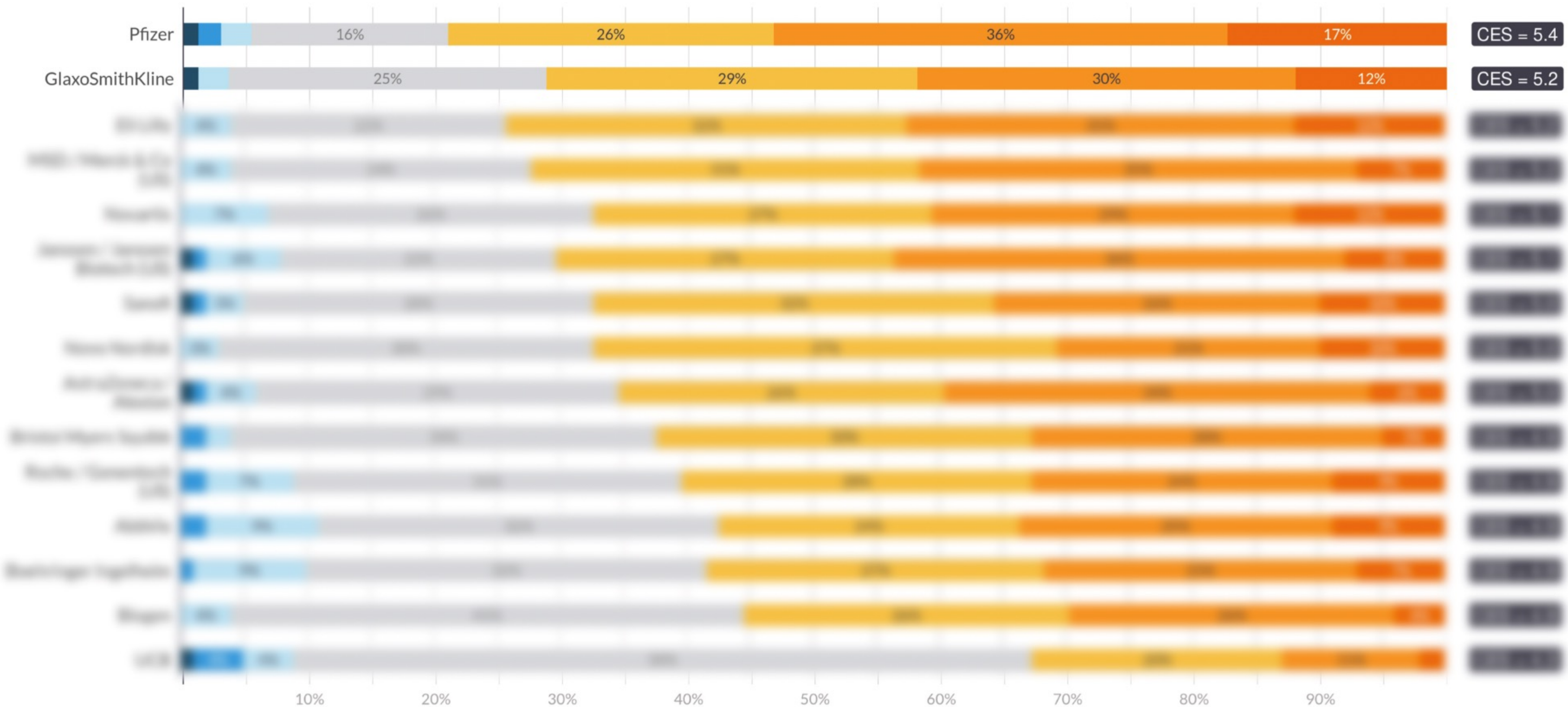
Where can you improve compared to your competitors on overall Cx as well as at channel level?

When it comes to overall Cx at company level, as measured by the Customer Effort Score (CES), Pfizer and GSK are in the lead

CUSTOMER EFFORT SCORE — PAYER UNITED STATES

Strongly disagree · Disagree · Somewhat disagree · Neither agree nor disagree · Somewhat agree · Agree · Strongly agree

N=167

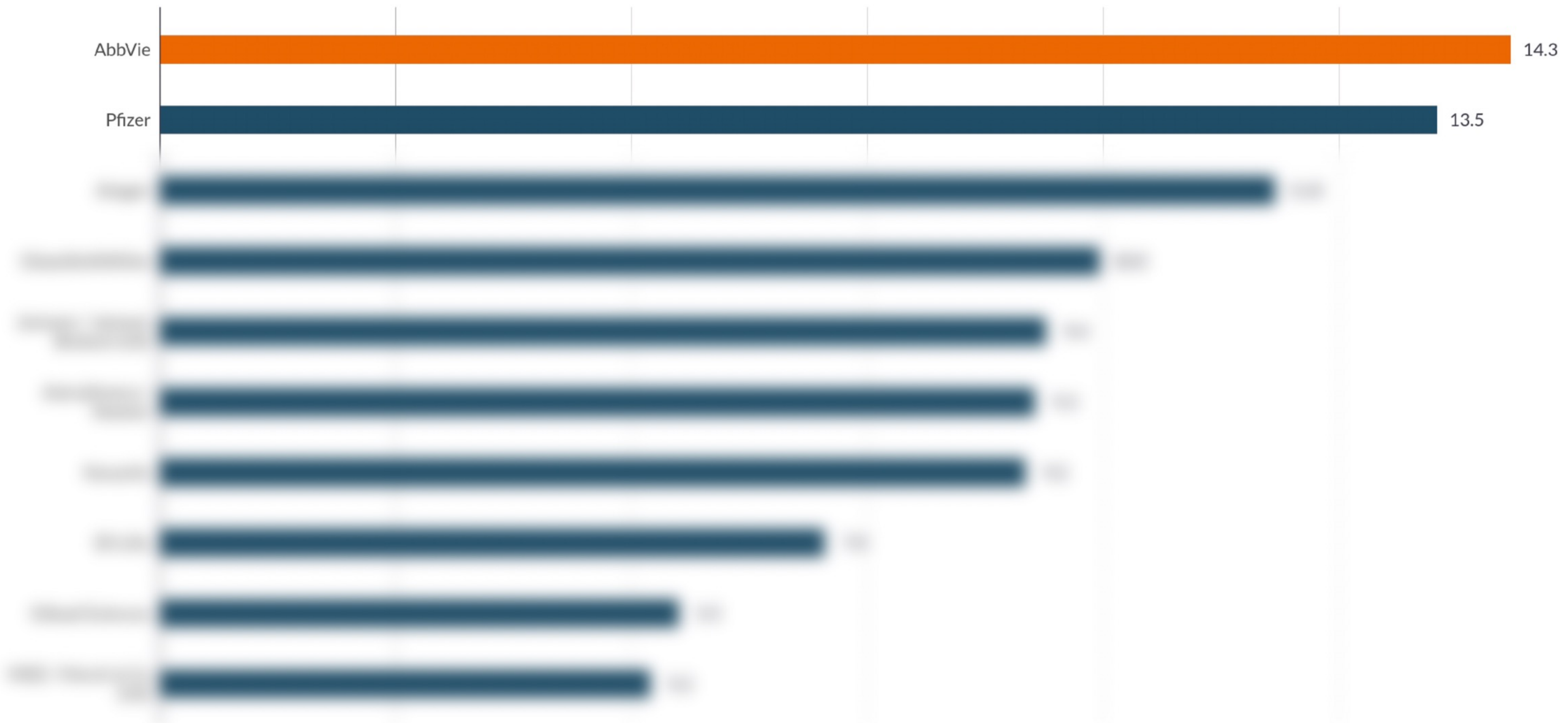


Respondents were asked to rate between 1 = strongly disagree to 7 = strongly agree
% = # of respondents who selected option out of total number of respondents
CES = average selected score

Source: Navigator365™ Payer

In contrast, when it comes to market access AMs (as an example channel), AbbVie and Pfizer are in the lead

AM LEADER SCORES – PAYER UNITED STATES
N=29



Respondents were asked to distribute 100 points to no more than 3 options
Score = sum of points averaged among respondents
Respondents who have not engaged with a AM in the last 3 months were excluded

Source: Navigator365™ **Payer**

How can we help?

"Omnichannel for payers:
an OCE payer strategy for EU4, UK & Canada"

CASE STUDY

Therapeutic area

NEURO

Funnel phase

CONVERT

Version 1.1

Reimagine customer engagement

Webinars

ACROSS HEALTH

“Omnichannel for payers:
an OCE payer strategy for EU4, UK & Canada”

CASE STUDY

Therapeutic area: NEURO

Funnel phase: CONVERT

BACKGROUND

- A global biopharma company wanted to develop an omnichannel approach for payers in EU5/Canada.
- The main challenge was that different countries had different payer types.

APPROACH

- Across Health developed omnichannel blueprints for payers at regional/local levels integrating the MAM* into the journey.
- The 6-step approach to developing an omnichannel strategy was used.
- In each country, the Payer Navigator 2.0 was used to generate key insights for channel and content affinities.
- Across Health conducted strategic workshops in each country; key outputs were used to prioritize recommendations.

**MAM : In-field Market Access Manager*

“Omnichannel for payers: an OCE payer strategy for EU4, UK & Canada”

CASE STUDY

Therapeutic area

NEURO

Funnel phase

CONVERT

CHANNELS USED

- 1-1 peer sessions
- Remote MAMs
- Personalized emails
- Webinars
- F2F field market access visits
- Phone calls
- Podcasts

"Omnichannel for payers: an OCE payer strategy for EU4, UK & Canada"

CASE STUDY

Therapeutic area	Funnel phase
NEURO	CONVERT

RESULTS

- Different types of payers in different countries were identified.
- Accordingly, for each country, recommendations on MVPs* and further execution plans were provided, based on the outputs from each country workshop.

LEARNINGS

Maximizing omnichannel payer interactions for market access outcomes can increase business impact, provide added value to and deepen relationships with payers, and differentiate the company from the competition.

**MVP : Minimum Viable Product*

Conclusions

- The payer market has changed – digital transformation was rapidly accelerated and we need to think differently about engagement
- Payers prefer an omnichannel approach to engagement
- Payer digital engagement from life sciences is not yet meeting the needs of Payers - there is an opportunity to lead this space
- There is a bigger opportunity to reach US payers through omnichannel than US Specialists

Want to understand more about payers in your market?

Want to learn more?
Pick up the phone
or drop us an email

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https://www.across.health/navigator365

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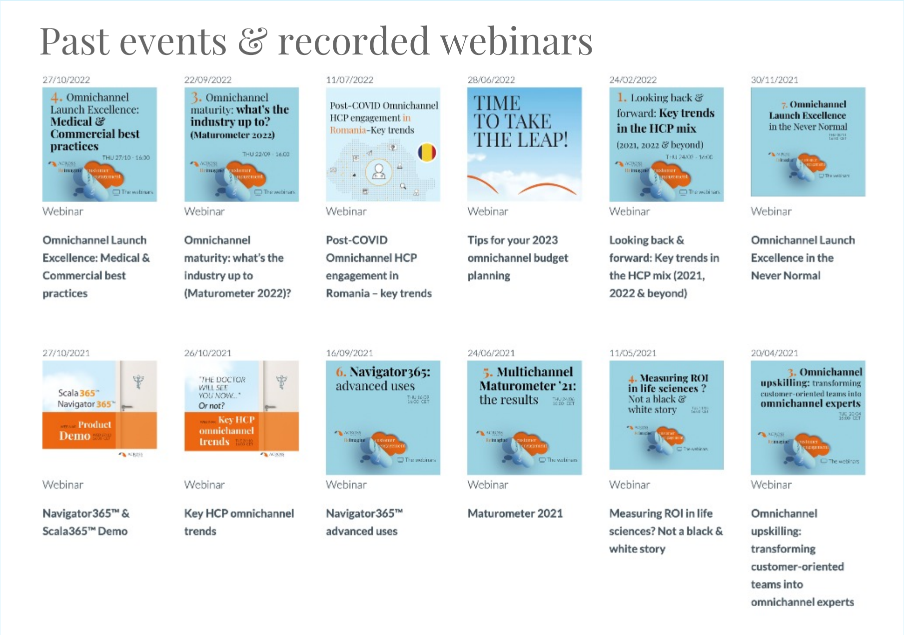

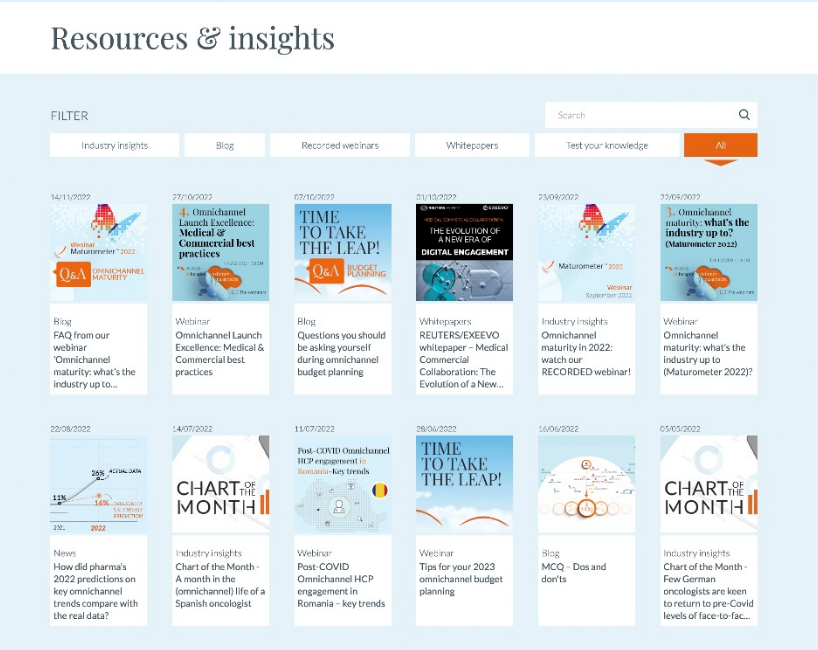

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