

A top-down view of a light blue desk with various items: a silver laptop with a black keyboard, a black stethoscope, a black pen, a pair of black-rimmed glasses, and a black smartphone in the bottom left corner. The laptop screen displays a webpage with blue and white graphics. The text 'COMMUNITY IN HEALTHCARE' is overlaid in white on a black rectangular background.

COMMUNITY IN HEALTHCARE

SMX GLOBAL KNOWLEDGE SHARE

MAY 2018



Healthcare Communities in UK

The healthcare landscape

Industry



Healthcare spend is expected to reach \$1,1 Trillion by 2020



Top 10 Pharma companies will account for \$371 billion in 2020



Medical devices & diagnostics are approx.: at \$375 bn and expected to growth at 5% per year.

Some Major Clients

Johnson & Johnson

NOVARTIS

Bayer

Lilly

Pfizer

Medtronic

AstraZeneca

abbvie

GILEAD

Takeda

Roche

gsk

MERCK

SANOFI

Bristol-Myers Squibb

Geographies

North America

Largest healthcare market reaching \$640bn by 2020

Europe

Healthcare spend slows down but global contribution remains at 20%

Japan

Aged care costs threatening viability of universal healthcare system

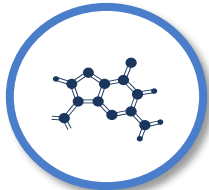
Emerging

China, Russia, India dominate with double digit growth rates

Diseases & medicines

Diseases

SPECIALITY



Oncology continues to be the largest category in developed countries, and the largest specialty area in emerging countries.

CHRONIC



Western lifestyles have led to an increased number of chronic conditions. An ageing population means affordability becomes an issue for these diseases.

RARE



Worldwide orphan drug sales forecast to total \$178bn (CAGR 2015 to 2020:+11.7%); Almost double overall prescription market growth

Medicines

RX Brands



During the first few years a new medicine becomes available, it is usually marketed as a brand under a name given by the pharmaceutical company that developed it. Companies take out patents (exclusive rights) on each new drug they discover to ensure they regain the money they spent on its development .

Generics



Once the patent protection expires, other companies can produce their own version of the medicine. Generic medicines are usually cheaper because there are fewer research and development costs, but they contain the same active ingredient as the branded products.

Branded Generics



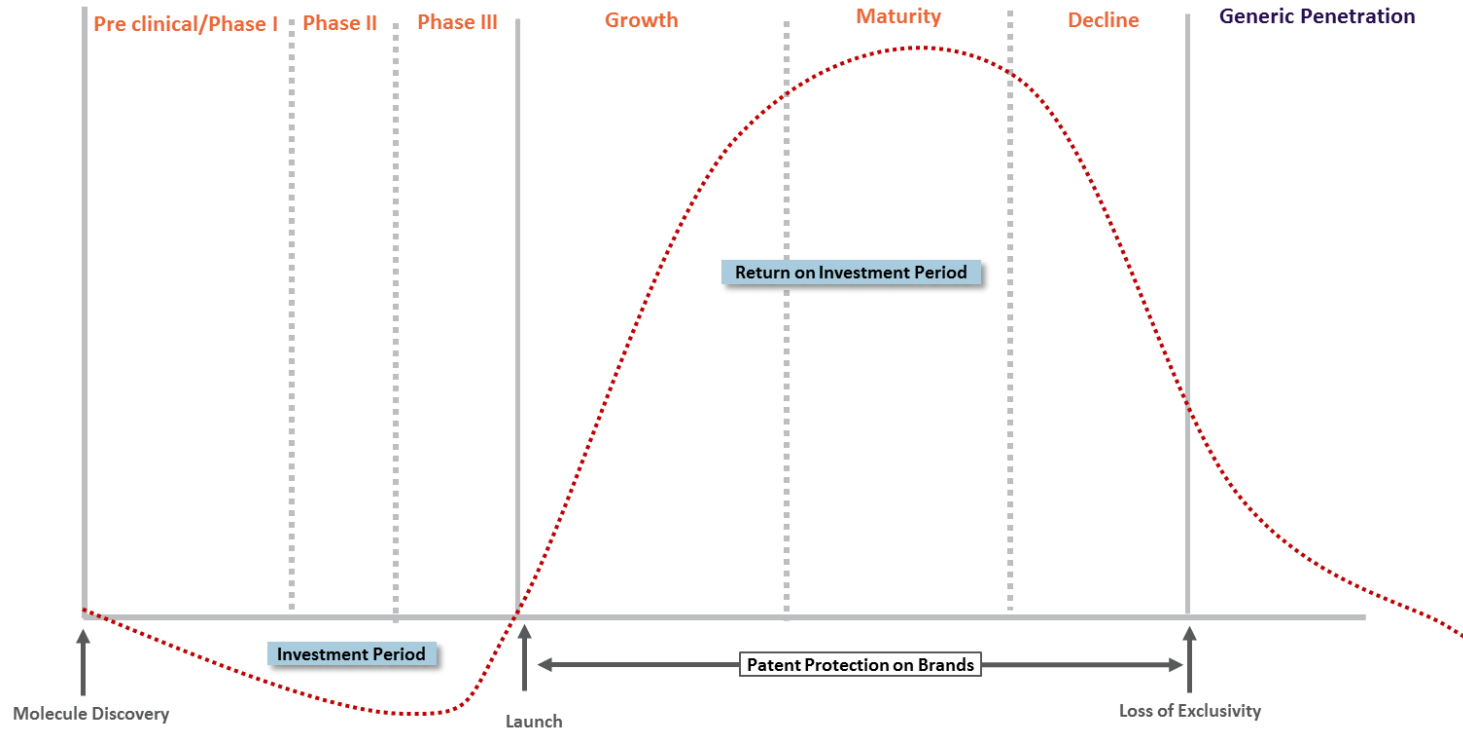
A branded generic is a drug that is bioequivalent to the original product, but is now marketed under another company's brand name.

Biologics Biosimilar



Biological medicines, including biosimilars, are derived or manufactured from a living biological system. They include hormones (e.g. insulin), enzymes (to speed up chemical reactions), blood factors (to regulate clotting), antibodies (to support the immune system), vaccines and advanced therapies (such as cell, gene and tissue therapy products).

Pharmaceutical drug life cycle



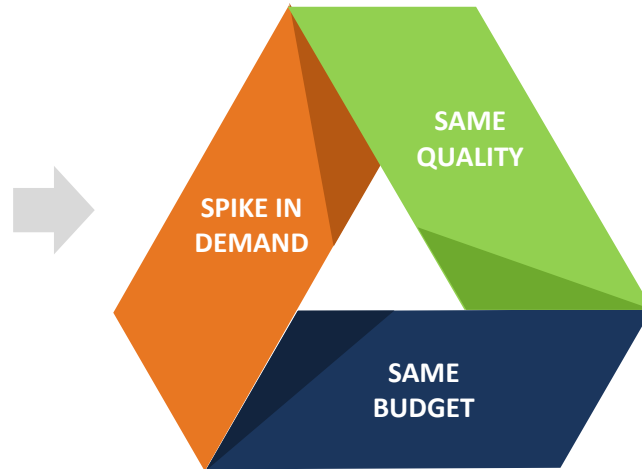
The healthcare industry's challenge

UNSUSTAINABLE DEMAND ENFORCING NEW PRIORITIES

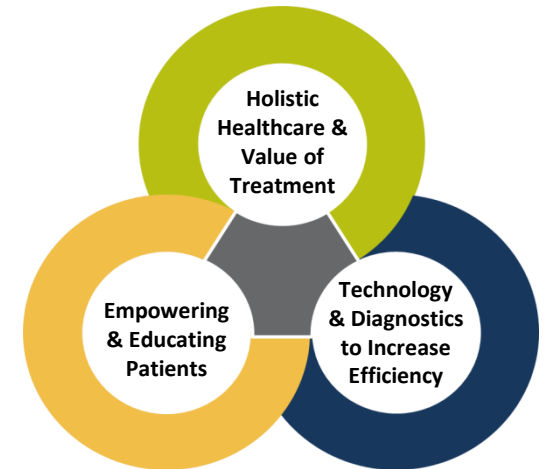
THE DEMAND DRIVERS



THE IMPOSSIBLE EQUATION



THE NEW PRIORITIES



Working in Healthcare

- Knowledge of the healthcare industry, therapy area and pharmacovigilance practices are CRITICAL
- Client are traditional by nature, we have a third of clients who have started to conduct patient research in the last 1 year only! It has (traditionally) been focussed on expert research (healthcare professionals)
- Clients want re-assurance our approaches are « tried and tested » in the therapy area e.g. have you conducted a community among oncologists? What worked? What didn't? etc.

HEAVILY REGULATED



HIGHLY TRADITIONAL



EVIDENCE DRIVEN



Our USP

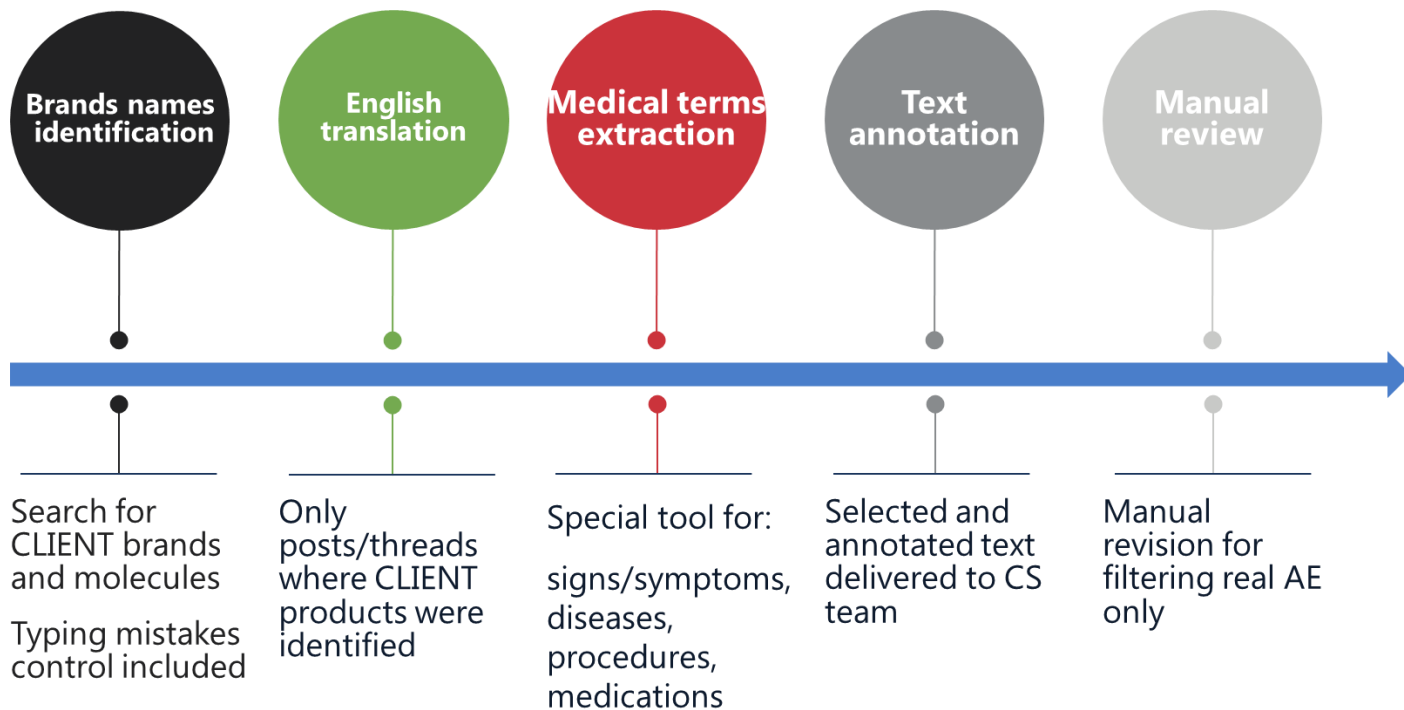
Therapy knowledge +
Healthcare expertise



AE reporting tool
(PV approved) + Compliance
practices

Community expertise

AE reporting tool



Healthcare Text Analytics <HealthcareTextAnalytics@ipsos.com>

Automated Adverse Event reporting

AE REPORTS WILL BE PULLED OUT AUTOMATICALLY, CHECKED MANUALLY AND REPORTED DAILY

The key principles of our tool are:

- **The program will search for client specific brands and molecules** – and potential AE comments associated with each of the client products.
- **All potential AE comments will be then checked manually by researchers** – this provides a 2 step qc approach to ae reporting to ensure that only real aes are reported.
- **All AE download will be fully automated and done once a day during business day, early in the morning** – this would allow us to process all data collected the previous day to be timely reported within 24 hours.
- **The forums will not be moderated over weekends or during public holidays** – therefore the weekend comments will be processed for the purpose of ae reporting the next business day, i.e. Monday morning.
- **AEs will be reported at an aggregate level, i.e. As a table, as recommended by EphMRA's guidelines for this type of data collection** – the exact layout of the table will be discussed with the client's PV team and could be adapted to meet the needs.

Please note, all teams involved in the research, including the moderator, analysts and researchers, will have undertaken specific client ae reporting training.

By accepting this proposal, client grants permission for Ipsos Healthcare to use Google automatic translation platform exclusively for the purpose of translating client data, such as open ends / verbatim, to be further used by Ipsos Healthcare to provide their text analytics and ae reporting services.

Structuring communities for success



HCP communities

- Short term communities sell (~10 days)
- Transactional in nature (unless innovative or new topic) and structured design
- Recruitment partner is critical
- Mix of individual and group tasks
- Moderator who is personable, professional and well spoken
- Limited video upload, audio popular

Structuring communities for success



Patient communities

- Short or long term
- Engagement can be high – individuals invested in learning about their illness
- Personable, engaging moderator key
- Recruitment partner important for quality
- Mix of individual/group tasks
- Space for organic conversation
- Video upload popular
- Product/connected health popular



Three Case Studies - UK

Case study: Pop-up online community with HCPs

OUR CLIENT'S NEED

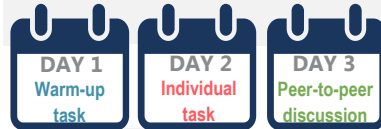
To understand the most **appropriate terminology** to use in launching their new product; a terminology that was **immediately recognisable** to prescribing physicians and in-line with the **language they use** in everyday clinical practice



IPSOS' SOLUTION

We proposed a two-step approach:

1. **1 week online community** to provide qualitative insights into the language used by HCPs. Using a mobile enabled platform with engaging activities
2. Feed online community findings into a **quantitative validation survey** to confirm optimal terminology for the new product.



BUSINESS IMPACT

The online community gave **a wealth of insight into how physicians spontaneously talked about therapy options.**

This allowed us to provide **direct recommendations** as to terminology that should be used in **launch communications** to ensure the product **immediately resonates** with physicians.

CLIENT BENEFITS

Key benefits of this approach:

- **Observer access** for client
- **Quick** and **agile** solution
- **Prompted** and **spontaneous** tasks to cover all objectives



Case study: Long term community MS patients

OUR CLIENT'S NEED

To inform the personalized medicine strategy for patients with chronic conditions (MS)

Provide the brand team regular feedback and provide a forum for “quick feedback” into brand plans



IPSOS' SOLUTION

A 2 year long community among MS patients in US and EU3 (Germany, Italy and Spain).

Bi-monthly interaction for 10 days and opportunity to participate in **ad-hoc tasks throughout the year.**

BUSINESS IMPACT

Brand plans optimized with patient feedback.

New concepts tested and validated by community.

Unexpected insights generated “beyond the scope”



CLIENT BENEFITS

“I think it is amazing that we have access to an online community for feedback but I really think we have taken it to a new level with this effort.

I feel it is my obligation to showcase it and articulate how Dev and Julie and our external partner IPSOS has enabled our effort to go above and beyond!”

Client quote



Case study: “Agile sprint” online community

OUR CLIENT’S NEED

Our client has developed a **new connected health technology** to aid medicine adherence for respiratory conditions and **wants to test the end-user reaction**

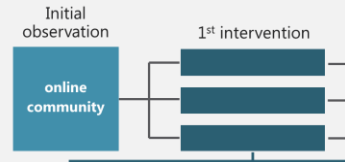
The team would also **like to understand “in-context”** why (and when) respondents stop engaging with their product



IPSOS’ SOLUTION

Our ‘Agile sprint’ product testing approach involves a **long term online community, combined with real world biometric data collection and a BeSci analysis framework** for the optimal product test

In addition, video data is collected on a weekly basis to feed into the design.



BUSINESS IMPACT

Optimization of the device – Language and technical updates recommended

Opportunity for keeping respondents on-board – based on behavioural analysis of barriers and potential interventions

Opportunity to grow the market in the product roadmap – based on behavioural analysis of drivers

CLIENT BENEFITS

BEYOND THE PILL SOLUTION

The client prepares to launch a new connected health product with differentiated (vs. competitors) end-user benefits and a clear targeting strategy for the type of patient most viable for the solution

The research provided key insight to develop new features build in the device to enhance engagement



The A1C Team - MERCK

Market Research Online Community
with Type-2 Diabetes Patients

Merck's A1C Community

The A1C Ipsos community team is a seasoned team of socialized research experts with over 15 years' experience with some of the world's largest brands. We are pioneers in the space, responsible for building and defining best practices and industry innovation for online community solutions.

For the past five years, Ipsos SMX and Healthcare have been managing patient communities for Merck focused on gathering insights from patients and their caregivers to support key product launches.

In addition to Merck, SMX has managed communities for Bayer, Baxter and Jazz Pharmaceuticals.

The screenshot displays the homepage of 'THE A1C TEAM' community. At the top is a green header with the logo and a search bar. Below the header is a large image of a family preparing food. To the right of the image is a 'NEWS & UPDATES' section with the title 'Recipes, Technology, and Your Members...' and a paragraph about a recipe exchange. Below this is an 'ACTIVITIES' section with two featured topics: 'Healthy Recipe Corner' and 'Diabetes and Technology'. On the right side, there is a profile for 'Karen', a Community Moderator, with a 'Watch Karen's Welcome Video' button and a 'NEW HERE? GET STARTED' button. At the bottom right is a 'POLLS' section with a question about recipe ingredients and a list of options.

THE A1C TEAM

Community Search

NEWS & UPDATES

Recipes, Technology, and Your Members...

Hi Team, We've got some great activities happening in the community this week! First, thanks to all of you, we know that exchanging diabetes-friendly, healthy recipes is extremely important. We'd like to announce an ongoing, permanent recipe exchange in the A1C Community starting this week! Post... [Read more](#)

[View All](#)

ACTIVITIES

Healthy Recipe Corner
Introducing the A1C Team Recipe Corner

Latest Ideas: [Turkey & Parsnip Curry](#)
Latest Post: [Re: Mexican Lasagne](#)

Posts: 26 | New: 26

Diabetes and Technology
Do you use technology to manage your diabetes?

Latest Post: [Re: Diabetes and Technology](#)

Posts: 61 | New: 61

Karen
Community Moderator
[About Me](#)

[Watch Karen's Welcome Video](#)

[NEW HERE? GET STARTED](#)

POLLS

Of the recipe items below, which one do you use the most often when cooking? *Select one*

- ☐ Whole grain wheat or barley
- ☐ Herbs like mint, cinnamon, thyme, cilantro and rosemary
- ☐ Nuts and legumes
- ☐ Citrus Fruits

Ongoing Research Objectives

Background

Merck's Diabetes team has established a patient Online Market Research Community to support the launch of the new T2D treatment ertugliflozin.



Research Objectives

The patient MROC informs many facets of the strategy and tactics for Ertu's launch, supporting the ongoing marketing activities and deeper understanding of the patients' lifestyles and their treatment needs.



Key objectives of the community

- Enhance knowledge and gain a deep understanding of the thoughts, feelings, and behaviors of targeted patients.
- Inform and evaluate patient promotional materials and patient education materials.
- Evaluate and optimize various strategic initiatives.
- Gain intelligence on Merck products, potential launch brands and competitive medications.

Business Goal

To generate patient insights to support patient strategy for Merck's ertugliflozin.

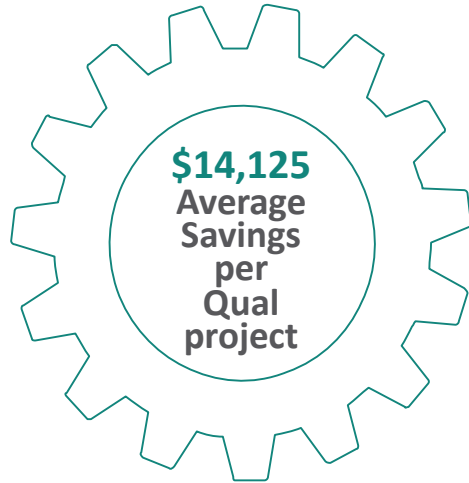


Success to date

In Year 2 of the A1C community, we executed 21 research activities, and saved \$180,000 when compared to conducting this research as standalone projects.

- **Qual Research Savings**

- 11.5 credits YTD
- Total Credit Cost of \$57,500
- Vs. \$230,000 as stand alone research



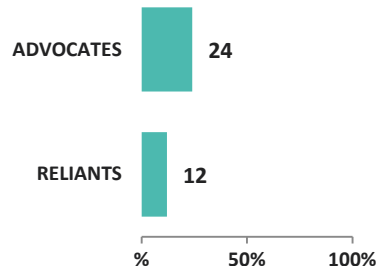
- **Quant Research Savings**

- 16.5 credits YTD
- Total Credit Cost of \$87,500
- Vs. \$425,000 as stand alone research

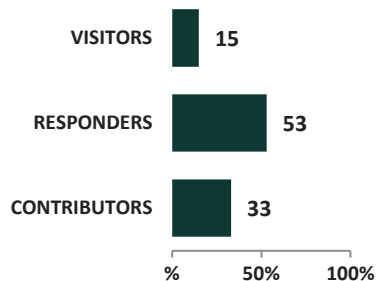


Participation Snapshot

ERTU MEMBERS



ACTIVE MEMBERS



RESPONSES

Surveys: ~200 – 300 completes
Discussions: ~ 125 – 175 Posts
Quick Polls: ~100 votes

SATISFACTION

- 76% Like/Love the community experience
- 53% check the community at least once a week
- 83% say surveys are their favorite activity

“We are individuals that suffer from an “invisible disease” like many other illnesses. We can talk to one another knowing the struggles we encounter regularly; all the while encourage each other by sharing ideas that promote better control of our diabetes so that we may live our best lives despite our disease! Therefore, I love the A1C team and this forum!” – **Female, 45-54**



Communities for Alkermes

Effectively and cost efficiently gather insights from difficult-to-reach patients

THE CHALLENGE

Client struggled to engage patients



SLOW RECRUITMENT

Finding qualified respondents took time and needed to be repeated for each project



NO SHOWS

Even once recruited, no shows were common



FEW RESPONDENTS

IN THE END, IT WAS NOT POSSIBLE TO ENGAGE WITH MANY PATIENTS

PATIENTS OF INTEREST

DIAGNOSED WITH:

- OPIOID USE DISORDER
- BI-POLAR DISORDER
- SCHIZOPHRENIA

A single project could take between 3-4 months to complete.

THE SOLUTION

Bring to life the voice of the patient for in-the-moment feedback and connection

1

Opioid Dependence LT Community

Recruiting 150 to participate in a series of activities over the course of the year.



2

Schizophrenia Patients and Caregivers Pop Up

Recruiting 150 of each audience in a 2-month engagement to deep dive into the patient journey

3

Bi-Polar Pop Up

Recruiting 150 to participate in a 2-month engagement to deep dive into the patient journey



The communities will be used to support:

MARKET PERCEPTIONS/AWARENESS

LIFECYCLE MANAGEMENT

ADHERENCE PERSISTENCY

UNMET NEEDS

PATIENT SUPPORT MATERIALS

MESSAGE COMMUNICATION

Thank you.