

NOVEMBER 2021

RETURN ON INSIGHTS

REAL WORLD EVIDENCE IN ACTION IN PHARMA MARKETING

Industry POV

Optimize Rx

 **DHCGROUP**

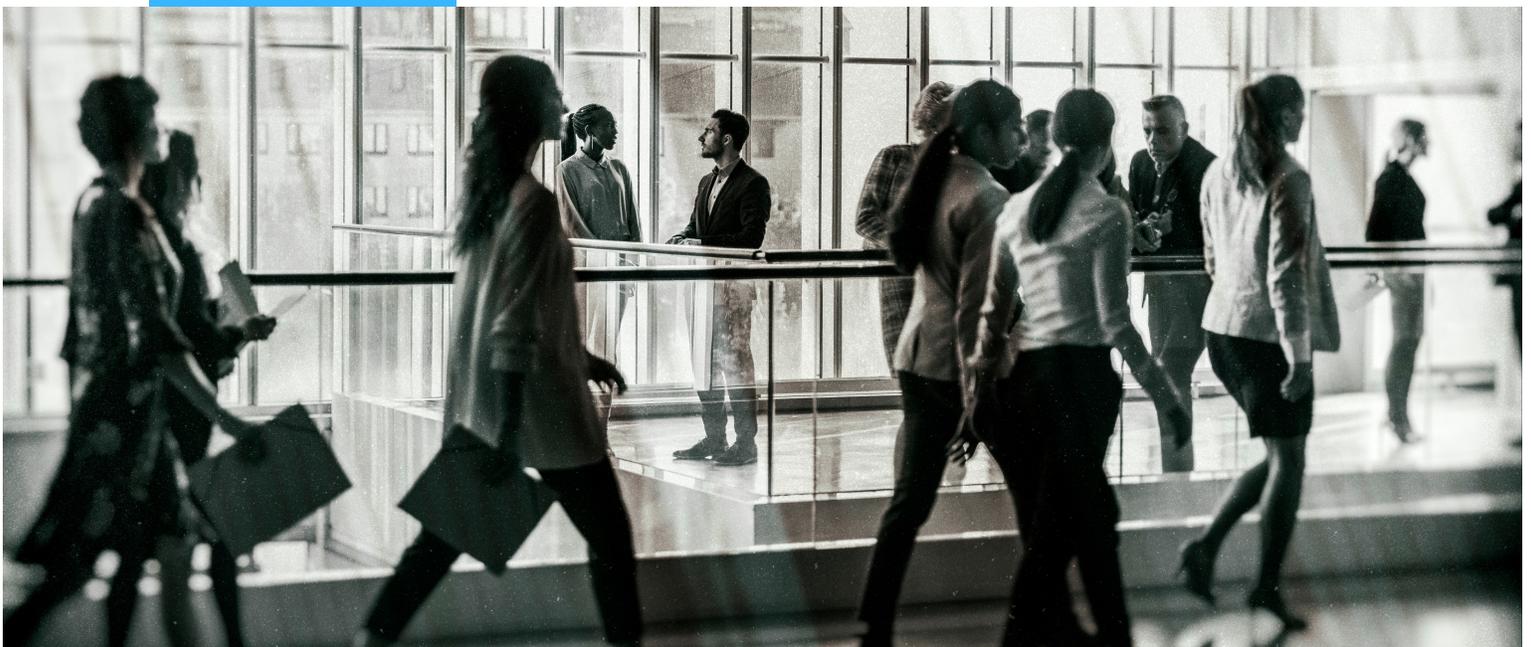
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INTRODUCTION

While pharma has been using real-world data (RWD) to generate real-world evidence (RWE) for clinical trials, post-marketing, and R&D for decades, the emergence and applicability of RWD to sales, marketing, and the commercial side of the house is now ramping up within pharma. Many organizations are exploring the possibilities related to targeting, segmentation, sales force effectiveness, and adherence, allocating growing budgets to acquire, analyze, and visualize data.

How can pharma manufacturers leverage those resources to ensure they're engaging HCPs and patients in a timely and precise manner? That's where advanced analytics and execution in RWD translate into actionable insights that can drive positive outcomes. This industry POV discusses the current landscape based on recent research with pharma execs, challenges with integration and adoption, use cases in pharma today, and future opportunities.

The research methodology included a mix of qualitative interviews with pharmaceutical executives (across medical affairs, regulatory, marketing, and innovation) as well as an online survey. Additional resources used to complete this POV include two industry webinars hosted by DHC Group and OptimizeRx.



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WHAT IS REAL-WORLD EVIDENCE (RWE)?

REAL-WORLD EVIDENCE IS THE CLINICAL EVIDENCE REGARDING THE USAGE AND POTENTIAL BENEFITS OR RISKS OF A MEDICAL PRODUCT DERIVED FROM ANALYSIS OF REAL WORLD DATA (RWD).

*End of the day, real-world evidence is what we're used to as marketers. Think of your search campaign. We might have 200-300 terms that we're bidding on, we have a handful of 25 ads, and we can handle that data, and figure out what works, and then optimize from there. That's real-world evidence in the most basic sense as what's happening from market research, or a controlled environment, like a clinical study. We do this all the time - we've gone and tested a campaign. We've launched campaigns, and they've done better than we thought, and they've done worse than we thought because the controlled environment isn't the real world. **So real-world evidence, at its most basic level, is simply what's happening with actual people when your program or your product goes to launch.***

Jill Wassil, Vice President of Marketing, miraDry, Inc.

I think of real-world evidence and data today like social media listening was 10 years ago. That level of noise – how do you extract the information and insights? How do you make it actionable? What do you do with it? What does patient engagement look like with that product? What does HCP engagement look like with that product? Does it fit into the HCP workflow?

*Jim Lefevere, International Business Leader,
Strategy & Customer Solutions, Roche Diabetes Care*



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RECENT FDA GUIDANCE

WHY IS RWE RELEVANT TO PHARMA MARKETING NOW?

I think it's very clear from the marketing perspective. Real-world data is now more important than ever, to the industry, to all stakeholders, including regulators like the FDA. That's the key takeaway in terms of data analytics and marketing innovation.

Eze Abosi, Head, Real World Evidence Solutions, OptimizeRx



In September 2021, the FDA issued a guidance document ... *Real-World Data: Assessing Electronic Health Records and Medical Claims Data To Support Regulatory Decision-Making for Drug and Biological Products*. In addition to seeking feedback from the industry, the guidance builds on the initial framework of the FDA to evaluate the potential of RWE for the approval of new indications and new products.

So What? This is a continued movement forward by the FDA to recognize the value of RWE across the pharmaceutical industry. In addition to product submissions, there is recognition of the value of using real-world insights to better understand how products work in a typical practice - and typical patient.

Additional resources on RWE and the FDA can be located at...

<https://www.fda.gov/science-research/science-and-research-special-topics/real-world-evidence>

The FDA has come out and said ... "RWE has an impact on actual patients and clinical data outcomes. Feedback from patients is valuable to determine how we look at a product, or what it's indicated for, or maybe a new product." That's huge.

Jill Wassil - MiraDry



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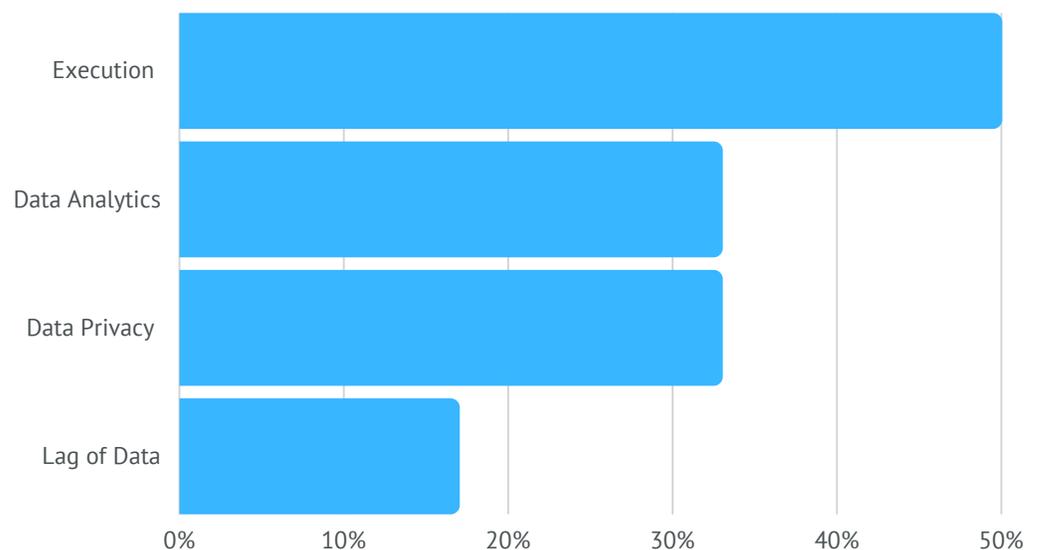
CHALLENGES

What is limiting success with RWE within brands? What are the barriers to more widespread use?

For this project and industry overview, a number of pharma executives from analytics, medical affairs, regulatory, sales, and marketing were asked about the state of RWE and the challenges holding them back.

They were presented with a range of barriers (Figure 1) and the most common barrier cited was "execution" - by 1/2 the respondents. Additional challenges included data analytics, data privacy, and for a small audience - time lag of the data used in RWE programs. In follow on conversations, many also cited the need for education with sales and marketing teams with regard to proper use of RWE data (for marketing).

Figure 1. Barriers to RWE Success in Marketing



Source: DHC Group

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CHALLENGES: PHARMA ORG CHART

THE LACK OF INTEGRATION AND COMMUNICATION LIMITS INNOVATION

When you see brand teams that have multiple parts of their organization, looking top-down at their market, at their patient, at their clinicians with a unified holistic view of the world, you see the most success. **The struggles happen where one part of the organization may have analytics, one part of the organization may have web, one part of the organization may have clinical, and one part of the organization may be focused on clinicians.** They're all sort of looking at a different view of the same market. The analysis doesn't always line up. When there's more of an integrated view and an integrated data set that is informing all the tools in the toolbox for the sales and marketing team, you have a more cohesive utilization, insights, and strategy.

Bill Evans, Chief Marketing Officer, Komodo



In addition to challenges with execution (using RWE data), another very common issue cited by pharma executives was the impact of the legacy structures within pharma, org charts limiting team synergies, as well as communication challenges between teams where RWE data may sit - and the brand and marketing organization. Often mentioned as a best practice, integration of team members, hybrid or standalone centers of excellence (COE), and employing individuals focused on serving as a liaison to link RWE strategy with brand strategy. Similar to success with any innovation (such digital, customer experience, artificial intelligence), the teams that nurture the topic as a unique asset and skill that deserves attention while also making sure the end result is baked into the core brand marketing strategies on a continued basis.

The data analytics functions and the marketing should ideally, be associated with the same branding and teams. Ensuring that the structure, as well as the conversations between these key stakeholders, are in tune is critical. If there's a disconnection between the DNA, the data, and analytics, and the understanding of what the business objectives are, versus marketing, there's going to be a negative implication on the results that your team yields.

Eze Abosi - OptimizeRx



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USE CASES IN MARKETING TODAY

FIELD FORCE ALERTS, PRODUCT LAUNCH, ONGOING INSIGHTS

There's an increased push to use in market clinical data to inform all aspects of commercial and sales strategy. This is not anything new. But resources get tighter, the move to digital gets more prevalent, non-personal promotion gets more active, medical affairs takes on non-personal, even in terms of scientific education, closing the relative gap of what's in the market versus the support systems pharma can provide. This is where a lot of the focus is now, You could look at every aspect of a pharma company and see where there is an effort to get closer to the patient – closer to the outcome – closer to the clinical event. We're seeing more of that data being infused into strategy, operations, faster than we have in the past.

Bill Evans - Komodo



To better understand the value received from brands using RWE today, it's critical to understand how RWE is being used with sustainable success– the practical use cases within brands and marketing teams. While most brands report the vast majority of their RWE efforts have been focused on a physician audience, many also report they understand the value to the patients as well - as the end recipient of the product for which the RWE was linked. Pharma marketers also mentioned the need for quick wins to build momentum and to remind everyone in the organization that RWE success requires a long-term strategy.

"RWE provides value for long-standing treatments in the market. RWE gives you something new to talk about – new indicators and outcomes. Also, if you can highlight that an existing treatment is subpar - because of the impact on quality of life - that's big when making comparisons to a new product."

Jill Wassil - Miradry



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USE CASES FOR RWE

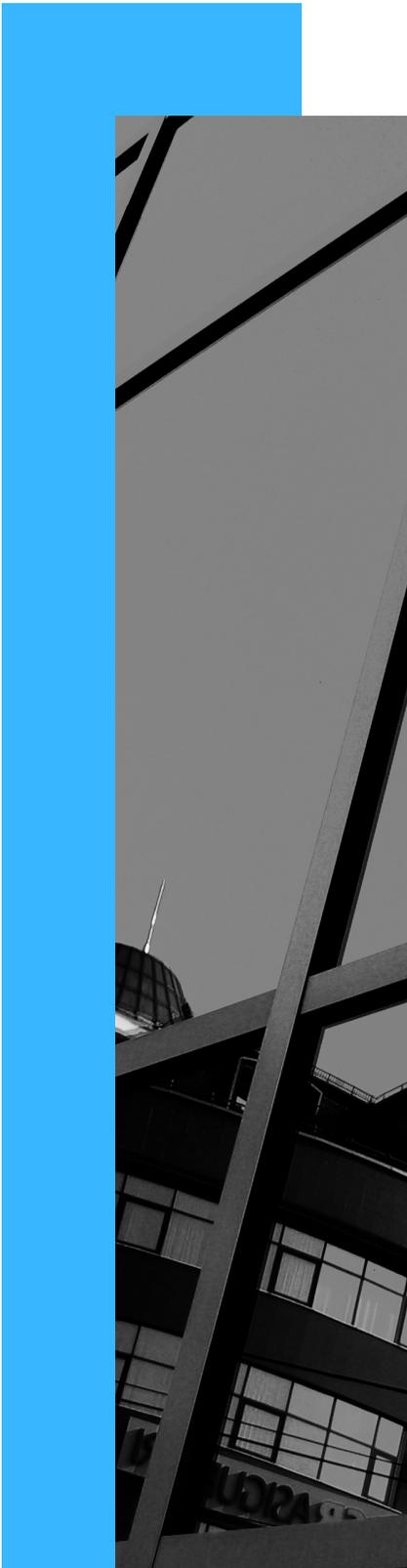
*We're doing field alerts. We're identifying specific markers that would connect a patient to therapy and triggering alerts to our field force to have conversations with those physicians based off these alerts. We're also using that same data to be able to trigger media - banner ads, emails, direct mail, all types of media. **We can have not only a personal touch, but also a non-personal surround sound for an HCP when we know there's something actionable, based off the data. We're taking the raw data, applying a little bit of analytics and insight to be able to have those conversations.** The other thing we're doing is prediction. So not only what's already happened, but will we expect to happen. We're trying to predict when a patient might become positive for a biomarker or might become diagnosed with a certain indication. Can we trigger the right media at the right time, to be able to influence an HCP to put that patient on therapy?*

A Pharma Executive



You're starting to see a lot of value out of next best action, because you're actually finally giving the physicians what they want and when they want it. Rather than pushing something that is time-based, you're making the best use of your three minutes the short amount of time that you have with them. You've optimized your interaction to respond to their needs it based on the data that you're collecting.

Shwen Gwee, VP and Head of Global Digital Strategy
Bristol Myers Squibb



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FUTURE OPPORTUNITIES FOR RWE

SATISFACTION, EXPERIENCE, CONTENT, ADHERENCE WITH THERAPY

From a marketer's perspective, the industry should be laser-focused on how to move forward with predictive solutions that can help better target or better activate the stakeholders that you're tasked to engage, HCP or the consumer. How we can take this idea of modern marketing or data-driven marketing, and leverage it in key use cases? One clear example is using AI to make a significant impact on our business today through optimized omnichannel marketing.

Eze Abosi - OptimizeRx



Looking beyond the use cases for RWE today, it is important to map out future opportunities well in advance because the use of RWE requires a long-term time horizon and strategy. A brand team often needs years of planning to make sure the data will be available when it's needed.

When asking pharma marketers about the future value and opportunities created through the use of RWE, the most common areas mentioned are ... better insights into actual product use, competitor insights, and a more complete understanding of how the products are being used in the real world. Some of the advanced companies cite the ability to use RWE to trigger media with their HCP audience as well as using it to predict which patients are likely to drop or stop therapy and then targeting the physicians with the relevant content and support services.

"RWE helps us surface concerns and satisfaction with products – and insight into our competitors"

"RWE gives a more complete understanding of HCP interactions with our patients"

"The opportunity is having the right people to apply this RWE data to HCP ad promo strategies"

"RWE drives more efficient communication, targeting, and timely content for HCP audience"

"RWE can help us determine which patients will drop off therapy with the 2nd, 3rd, and 4th fill"

- Pharma Executives

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FUTURE OPPORTUNITIES FOR RWE

NEED FOR UNIFIED DATA VIEWS BEFORE DATA DRIVEN INNOVATION

Future opportunities for RWE are impacted by the current limitations on the interoperability of different data providers. While data capture is happening for almost every patient, without communication between providers and data aggregation, we are missing the complete picture. Progress in platform-agnostic universal patient identifiers will improve pharma's ability to leverage data. Experts also identified additional areas ready for data driven innovation such as the ability to use clinical data to tie the relevancy gap to a clinician in a specific zip code, seeing a higher volume of patients or identifying patients more likely to drop off at a specific point in the care journey. These types of innovations in data applications improve spending efficiency and improve patient care outcomes.

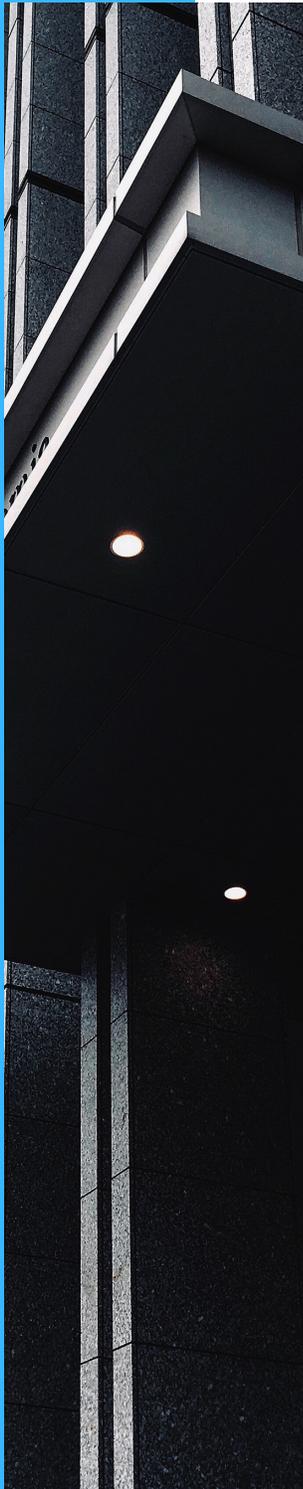
Our traditional method was always clinical or claims data. However, not all things can be inferred from these traditional claims data sources. More recently, you've got EHR and other sources of real-world data (RWD). There are a lot of players that are starting to extract EHR data – both structured and unstructured – as well as collect other forms of RWD, including sensors, PROs, etc. What you're starting to see now is the appreciation for multiple data modalities to provide higher resolution insights. Some companies are now starting to play the connector role, by tokenizing data across multiple modalities, and then stitching them together so you get a more holistic view of patients.

Shwen Gwee - BMS



I think we're all a little bit more open to what can help us pivot and drive innovation and act quickly. If you're only relying on what data you have today, and you think you're good for the year, you're good for the next five years, you're going to be stuck, right? You never know when another competitor is going to come out, or a patent extension is going to come out, or a physician has a new discovery. You should be ready for anything.

Jill Wassil - Miradry



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CONCLUSIONS

RETHINK ORG CHARTS AND INTEGRATION ACROSS TEAMS
TO DRIVE RWE SUCCESS LONG TERM

I don't think there's one right answer to organizational structure - depends how the company is set up. But I do think it needs to be increasingly tied to all functions and therapeutic areas. So it needs to be much more of a centralized integrated group.

Shwen Gwee - BMS

Silos and communication breakdowns are nothing new to large companies - pharma is no exception. However, the pushback by pharma executives was that the gap between data, analytics, RWE, and the marketing organization is limiting the holistic value of RWE data, insights, and ultimately execution. The companies that seem to have had early success with RWE in their marketing and brand teams, also seem to go above and beyond to make sure teams are integrated and sharing best practices throughout the organization. A handful of companies have gone as far as placing RWE in a COE and then placing leadership for RWE within the commercial analytics and the marketing organizations - so they are focused on the same assets to drive overall value for the organization.

TO FULLY CAPTURE THE VALUE OF RWE, BRANDS AND
MARKETING MUST CLOSE THE LOOP AND EXECUTE

Personalization is key, and it's the right message at the right time to the right patient and physician. That's why data - including real evidence - is important in all commercial and marketing activities.

Jim Lefevere - Roche

When talking to pharma executives, they don't cite data, privacy, time lags, or even analytics as barriers to success. They have the data and they have the analytics. When many see a barrier today - and significant upside in the future - better execution capabilities to act on the information and insights generated by RWE programs for marketing. Brands ultimately need triggers that feed into relevant channels, platforms, and execution pathways to reach the end-users and make an impact on treatment decisions. Knowing the audience to target is only half the battle - you must execute.

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CONCLUSIONS

WHILE RWE USE CASES ARE LIMITED WITHIN BRANDS TODAY, SIGNIFICANT OPPORTUNITIES LIE AHEAD

Predictive analytics in patient support programs that really look at the whole patient journey, and create support models, both for the clinicians that are caring for those patients, and the patients themselves, they can get much more targeted and relevant to needs and where they are in their particular sort of care pathways. So that's a really big opportunity.

Bill Evans - Komodo



As discussed earlier, many of the use cases within marketing teams employ RWE for brands related to product and early-stage support with a physician audience. There are also emerging cases of brands using RWE to support mature in-line products with new insights not captured in historical clinical trials.

Tactical examples of using RWE today also include field force alerts, media placements (based on triggers) competitor insights, as well as patient support programs.

NEW DATA STREAMS WILL EMERGE IN THE RAPIDLY EVOLVING CONNECTED HEALTH WORLD

Understand the data, and then just know that eventually, you're going to be able to use that data. You would never shy away from reading a report on the latest Facebook trends, or the latest Instagram or TikTok trends. Why would you shy away from understanding the latest data on your actual patient and the disease?

Jill Wassil - Miradry



Just as the Internet gave marketers a whole new set of data to better understand their market, the connected world of digital health will generate significant amounts of data to drive next-gen RWE programs. We must think broader than EHR, clinical, claims, and existing RWE sources in use today. If therapeutics become digital therapeutics with a tracking or app component, we will have additional data and insights to drive future marketing and engagement and audience insights.

FEATURED EXPERTS

INDUSTRY INSIDERS AND THOUGHT LEADERS

Connect with these RWE experts to learn more about the impact of real-world evidence, data, and future brand and marketing opportunities.

Eze Aboji
Head, Real World
Evidence Solutions
OptimizeRx

Bill Evans
Chief Marketing Officer
Komodo

Shwen Gwee
VP and Head of Global
Digital Strategy
Bristol Myers Squibb

Jim Lefevere
International Business
Leader, Strategy &
Customer Solutions, Roche

Jill Wassil
Vice President,
Marketing, miraDry, Inc.

We would also like to thank the pharmaceutical executives who participated in this project but chose to remain anonymous.



MORE INFORMATION

The logo for DHC Group, featuring the letters 'DHC' in a bold, sans-serif font followed by 'GROUP' in a smaller, all-caps sans-serif font, all in white on a blue background.

DHC Group
thedhcgrou.com

DHC Group funds and conducts research, hosts and produces industry events, while offering media and outreach opportunities for its members. The DHC Group partners with numerous industry outlets, including the Digital Health Coalition, to drive industry thought leadership forward and and make research-supported content available to a broader audience of pharmaceutical, media, publishing, technology, and advertising firms interested in the future of digital health, marketing, and customer experience.

The logo for OptimizeRx, with 'Optimize' in a light blue sans-serif font and 'Rx' in a bold, dark blue sans-serif font.

OptimizeRx
OptimizeRx.com

OptimizeRx is the best-in-class health technology company enabling care-focused engagement between life sciences organizations, healthcare providers, and patients at critical junctures throughout the patient care journey. Connecting over 60% of U.S. healthcare providers and millions of their patients through a proprietary point-of-care network, connectivity is facilitated via its integrated Therapy Initiation and Persistence Platform, which helps advance affordability and therapy adherence.

