

IPSOS IN THE HOT SEAT 2022: HEALTHCARE

Book of Inspiration

IPSOS HOT SEAT

THE BOOK OF INSPIRATION

What is a Hot Seat?

A Hot Seat is an engaging, punchy, dialogue-based workshop centred around your business challenges.

It is not a sales pitch and is not an opportunity for us to give you a credentials session. Instead, a Hot Seat is focussed on discussing your topics and bringing you new perspectives on these topics.

How to set up a Hot Seat?

We will work with you to identify the topics most relevant to your team's challenges, needs, and wants, we will then bring you experts in these areas. You get to put us in the Hot Seat and judge whether you agree or disagree with the ideas we share.

This book is by no means comprehensive but covers a range of topics we're often asked to speak about.

YOUR HOT SEAT EXPERIENCE

No two Hot Seats are the same, and the right structure will depend on the topics and the format. The most popular structure is an interactive format with all attendees in-person together (where possible) – we can, of course, also tailor the approach for remote settings.

A typical agenda for Hot Seat:

- 15 min: Introduction by our facilitators
- 1 hour: 3-4 Hotseat deep dives, each made up of:
 - 5-10 min: Expert in the Hotseat
 - 10-15 min: Reactions and judging – discussing implications
- 15 min: Wrap-up and putting it all together

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Section 1 – Trends and Future



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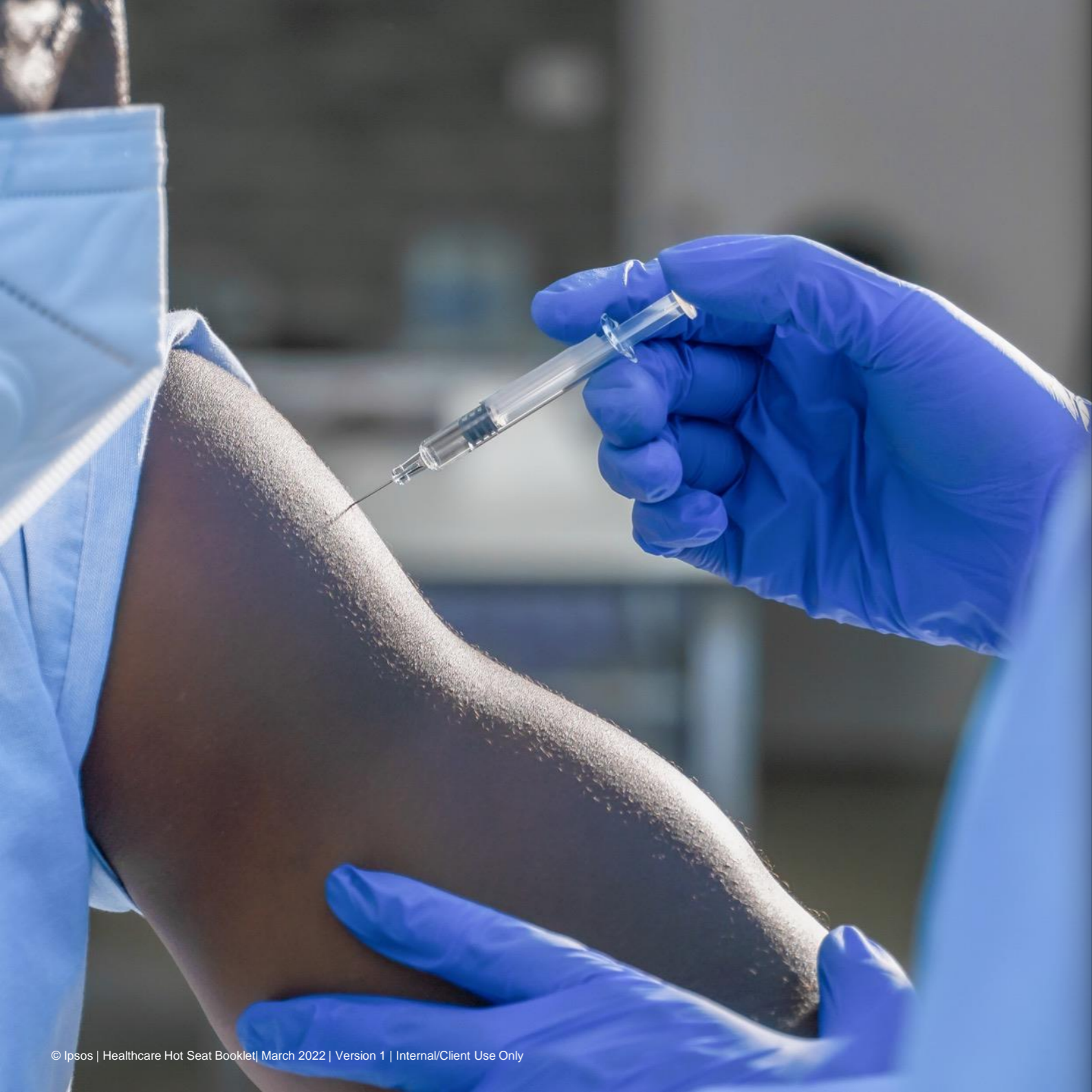
The future of health

The face of healthcare is changing at an accelerating rate. We've seen the rise of virtual care providers, better informed patients collaborating on care decisions, and multiple new digital therapies with regulatory clearance now available on the market.

How do experts and patients feel about all the new tools available to them? What will help them in the future? What are KOLs and payers willing to endorse? And what does the future of wellness really look like? These are some of the questions Ipsos are focusing on. Among our research, Ipsos' Digital Doctor has been running since 2015 and is the largest studies of its kind covering digital and connected health.

What would you like to know about how the future of health is impacting your therapy area?





The changing future of vaccines

We now have multiple vaccines that have proven effective and safe against Covid-19 and many more in development. All of this has been achieved in record time from development and manufacturing to approval.

We know exceptional times call for exceptional measures and the extent and impact of the pandemic allowed expedited development and approval. But we won't go back to the pre-pandemic world; what have we learnt in the last 2 years that will change the vaccine world forever? What will be the

long-term impact for other vaccines, and what do traditional vaccine developers need to know to avoid being 'left behind'?

The pandemic has disrupted the way we see vaccines, and public dialogue about vaccines has been the centre of attention. How should we expect the general population to behave differently in the future – will they make more informed decisions when it comes to vaccination?

Digital therapeutics: A new category to augment treatment, or replace it?

Digital therapeutics (DTx) are a hot topic in healthcare. DTx are poised to disrupt treatment pathways, with significant investment (\$668M in 2020 alone), mergers and acquisitions activity, and a vast pipeline of prescription-based DTx in development.

Digital Therapeutic Alliance's definition: DTx are evidence-based therapeutic interventions driven by high quality software programs to prevent, manage, or treat a medical disorder or disease.

What is the current regulatory pathway of DTx?
What are the predictions for which therapy areas will be heavily disrupted by DTx? And what are the physician and patient perspectives on DTx?

In your organisation, will DTx augment or replace your current and future treatments?





Why we need to know the person behind the patient

In consumer sectors the customer is seen as key, with user experience at the centre. It's time for the healthcare industry to catch up and more actively consider the voices and experiences of our end users.

We know Healthcare Professionals are experts in their field, but they're not the only expert. How do we verify that HCPs fully understand patient needs or what works best in the context of patients' lives? Patients are the only true authority on their own experience.

Not only do patients have valuable

and untapped insights to offer, they are also becoming increasingly involved in their own care, their opinion weighing more heavily in decision-making.

How can patient understanding allow us to achieve optimal treatment decisions and outcomes? What are the implications of patient empowerment for your organisation?

The evolution of pharma

It is widely accepted that the pharma industry needs to change or it will be left behind like Kodak, Taxis and Hotels.

The current business model is based on the development of drugs that go on to fund the next generation. It is an industry that has to navigate a challenging regulatory environment, has certain moral expectations around it and is heavily driven by the need for data and proof.

Ultimately our industry is scared of what's to come and hasn't yet found a way to move forward with any certainty.

Covid-19 has changed the rules across sectors, from work to care. How can you use this time of disruption to drive forward successful changes across our industry?



Can you keep up with disruptions in medical devices and diagnostics?

Disruptions to the medical devices and diagnostics industry are forcing companies to re-evaluate their market position and business strategy.

The entire care pathway is being re-defined by technologies including artificial intelligence, robotic surgery, and patient generated data from connected health devices.

It is more critical than ever to understand what type of device and diagnostic solutions are needed, and how to position and

communicate with customers about these solutions.

Patient centricity and fundamental changes in physician-patient interactions have caused a change in the engagement customers expect from medical technology providers who have historically operated in a B2B environment.

How does your position need to change? And is your strategy strong enough to meet these changing demands?



Section 2 – Digital Disruption: The Channel Evolution



Your Ipsos experts



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Do you need to change the channel?

Is there anyone who is not thinking about their omnichannel strategy in light of the pandemic?

Pharma had to quickly adapt away from the traditional face-to-face sales reps and embrace the digital transformation that has been talked about for years.

Some rose to the challenge and used it as an opportunity to apply digital solutions and innovation, others struggled to move their offline content to an online setting and truly engage their customers in the same way.

How can companies turn omnichannel challenges into opportunities and bring the voice of the customer to the forefront of their strategies? What is the future of omnichannel?



Experiences, not things

Customer Experience (CX) is becoming more and more of a buzz word in pharma, but what does it mean for our industry?

CX is already very well established in the consumer sectors; at its best, teams bring together research programmes, tech platforms and strategic thinking to input into actions across different parts of a business to increase CX scores - which have proven links to increased ROI.

The ability to obtain and act upon individual level feedback is key in developing CX winning strategies,

and there is plenty of room to take advantage of these approaches in pharma. But what is and isn't possible in the pharma world? And are our businesses set up to truly achieve great CX and successfully measure ROI?

Where are you in the journey to achieving great CX, and how do you get to where you want to be?



Let's talk about your reputation. Time for change?

The pandemic is undoubtedly shaping the pharma industry's reputation. Pharma's work and impact on society has been thrust into the spotlight, and is part of public discourse in a way not seen before.

This is a pivotal moment. Long-held assumptions about the industry's reputation are being challenged. The industry has a unique opportunity to challenge norms about who it should engage with, why, and how – and reassess how it communicates its value story.

Has the pandemic changed stakeholder expectations? Does its public reputation matter? Can pharma improve its reputation for the better? Is now the time for change?



Section 3 – Changing Power Dynamics: Market Access



Your Ipsos experts



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New medicines, new challenges

The prospect of cell and gene therapies is good news for patients, but will be an increasing challenge for payers. So far, payers have been able to absorb the cost of cell and gene therapies targeting rare diseases, but their ability to do so will be strained when products become available for more prevalent diseases.

Biopharmaceutical manufacturers must work with payers to find ways to avoid a budget crisis and ensure that treatments reach patients. They must develop long-term evidence plans to address the

uncertainties of magnitude and duration of effect. They must also consider ways to address affordability and support outcomes-based contracting, including the adoption of innovative funding models common in other sectors such as the financial services industry.

Are you all set to overcome the new challenges that come along with new medicines?



The shift towards Integrated Care Systems: prevention, treatment, and social care

The population is aging and the burden of illness is increasing. As a consequence, the cost of both healthcare and social care is increasing. The healthcare system is historically here to cure the problem – illness - once it has arrived, rather than addressing prevention and support for the consequences of illness and aging. Faster and earlier diagnosis allows outcomes to be better (and cheaper). Increasingly, we have the potential to use technology to catch things early and in return improve prevention and outcomes. How can

we adapt health technology assessment systems to ensure they holistically address the co-dependent value of prevention, treatment, and long term support and social care?

Where does your organisation have opportunities to join the transition to treating for health rather than illness?

Using multi-source data to inform payer decisions

Regulatory and health technology assessments increasingly embrace data and evidence beyond traditional RCTs, including:

- Real-time data: Data collected through digital health technologies, including apps and wearables
- Primary and Secondary care databases
- Audits of clinical practice, and registries of the use of medicines, devices etc
- Data that represents the views and experiences of people using services, whether

captured formally e.g. via surveys, or informally e.g. online discussion forums or patient experience sites

Demonstrating value to payers using multi-source data needs forethought, planning, and investment of time and money. It is not a quick fix when you get to registration, it is a critical factor for the product's success. How can you ensure success for your products?

