

The biopharma industry is challenged to develop patient and provider support programs to continuously improve the success rate of patients starting and adhering to specialty therapies. Manufacturers have evolved their approach to patient engagement by incorporating digital tools and data analytics to support education, therapy maintenance and ongoing communication between both providers and patients. Yet, HCPs report there are still opportunities for improvement in patient and provider support programs. The VMS Biomarketing Research and Analytics team conducted its annual market study of HCPs and identified three key areas of opportunity. Please contact VMS for the full report.

HCP Support

Market Trends

95% of HCPs say new therapy training and education should come from someone with clinical experience.

39% of HCPs report low confidence when talking to patients about their therapy.

94% of HCPs rate the importance of biopharma companies providing education and training to HCPs today as important or very important.

40% of healthcare providers rate digital, self-serve training tools as marginally effective.

Opportunities for Biopharma

- Engage HCPs in peer-to-peer conversations to grow confidence speaking about dosage, side effects and available resources.
- Use Clinical Nurse Educators (CNEs) for HCP education and training on specialty therapies.
- Combine in-person training with digital tools to optimize the mix of technology and human connection.

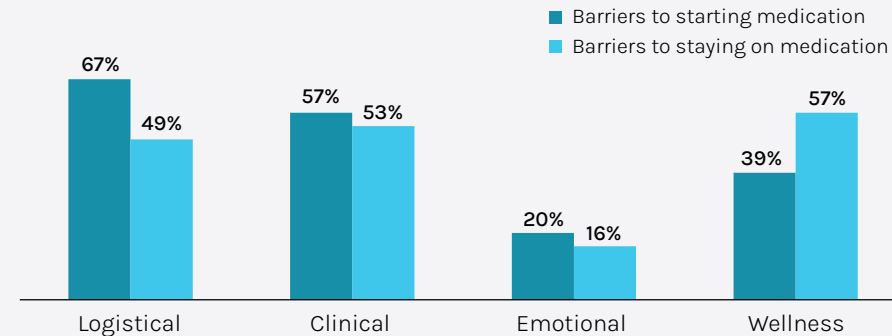
Patient Support Needs

Market Trends

87% of HCPs believe patient education, coaching, and support navigating access is very important in specialty therapies.

57% of HCPs report that wellness and integrating therapy into daily life is the largest barrier to therapy adherence.

90% of HCPs recognize that CNEs can provide effective, comprehensive support for patients starting on and adhering to specialty therapies.

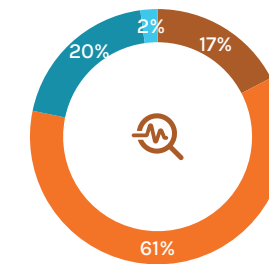


Opportunities for Biopharma

- Ensure support programs deliver holistic care, providing support for access, cost, clinical, and emotional needs.
- Emphasize ongoing education and caregiver/family support to help patients integrate therapy into daily life.
- Implement a single-point-of-contact (SPOC) model leveraging CNEs to provide health coaching and communication with HCPs.

Awareness of Support Programs

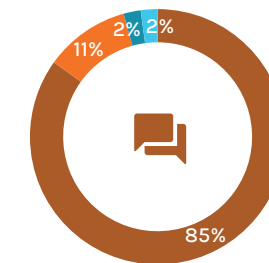
Market Trends



HCP Awareness of Patient Support Programs

- Aware
- Somewhat aware
- Slightly aware
- Not aware

Only **17%** of HCPs are fully aware of the patient support programs available to their patients.



HCP-Reported Importance of Increased Communications to HCP Offices About Patient Support Programs

- Very important
- Important
- Somewhat important
- Slightly important

85% of HCPs say it's very important to hear feedback from pharma companies about how their patients are adjusting to new medication.

Opportunities for Biopharma

- Offer HCPs live demos of patient portals and resources to improve HCP awareness of patient support programs.
- Provide patient progress updates to HCP offices through digital tools, feedback forms, or live syncs.

