

Background

- Everything we see and read implies that we are well into a digital age, with the “pad and pen era” a distant memory. The growth of webinars, blogs, podcasts, and chatbots gives us opportunities to train, learn, and communicate at any time, wherever we are.
- Health economics & outcomes research (HEOR) and market access have traditionally been slow to adopt digital media, as evidence based content and methodologies appear to give less opportunity for digital experimentation.
- Use of digital media to communicate with internal teams and external payer audiences ranges from digital content and tools, to data collection and digital platforms.

Objectives

- In a previous survey we conducted in 2021, payers recognised the value of receiving information via a variety of digital media, if provided alongside traditional formats like publications. Payer comfort with digital media has increased since the COVID-19 pandemic.¹
- We conducted the current study to further evaluate changing digital communication needs and expectations within HEOR/market access.

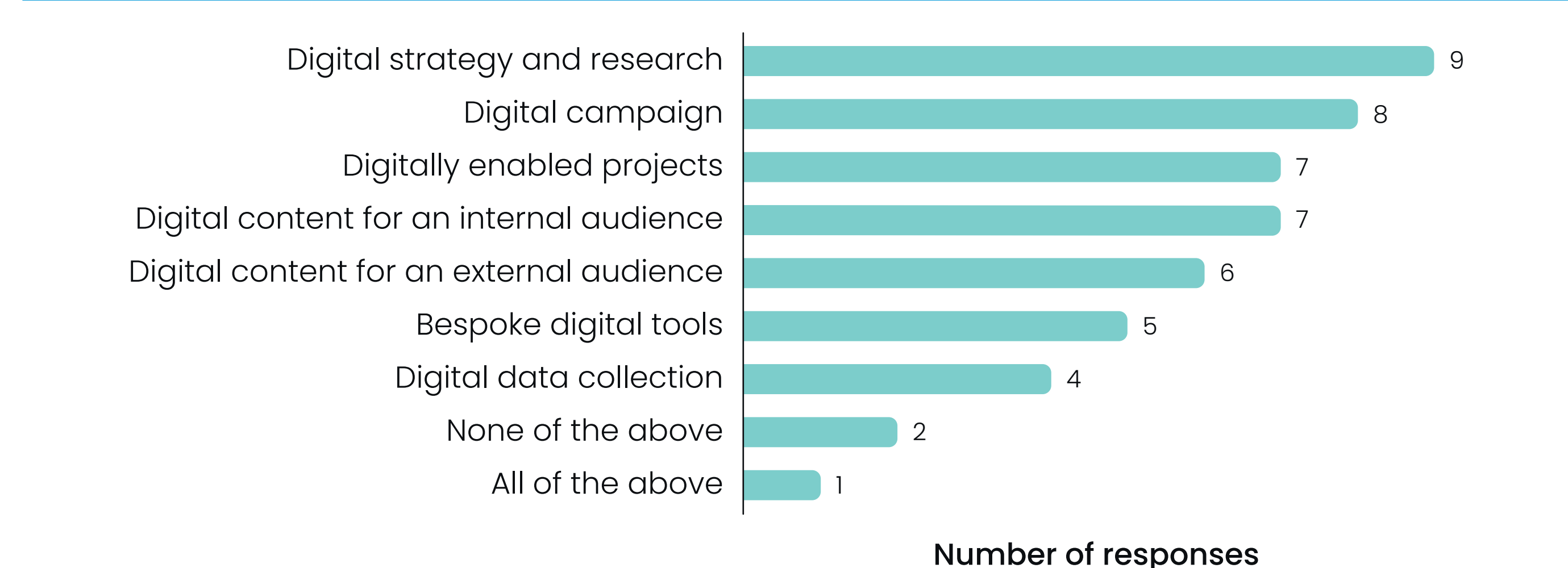
Methods

- An online anonymous survey of five questions was sent to pharmaceutical professionals working in HEOR/market access roles across Europe and the United States, between June and September 2023.
- Respondents were asked to respond to three compulsory questions. The question formats were a mixture of open-ended and multiple-choice answers.

Results

- A total of **19 respondents** completed the online survey.
- The results demonstrate that there is an appetite for a wide variety of digital methods to create and communicate HEOR/market access work.
- Nearly half (**47%**) of respondents had initiated **digital strategy and research**, e.g., digital landscape analysis, social listening and above-brand digital strategy, in the last 2 years. Two respondents (**11%**) had not initiated any digital projects in the last 2 years (**Figure 1**).

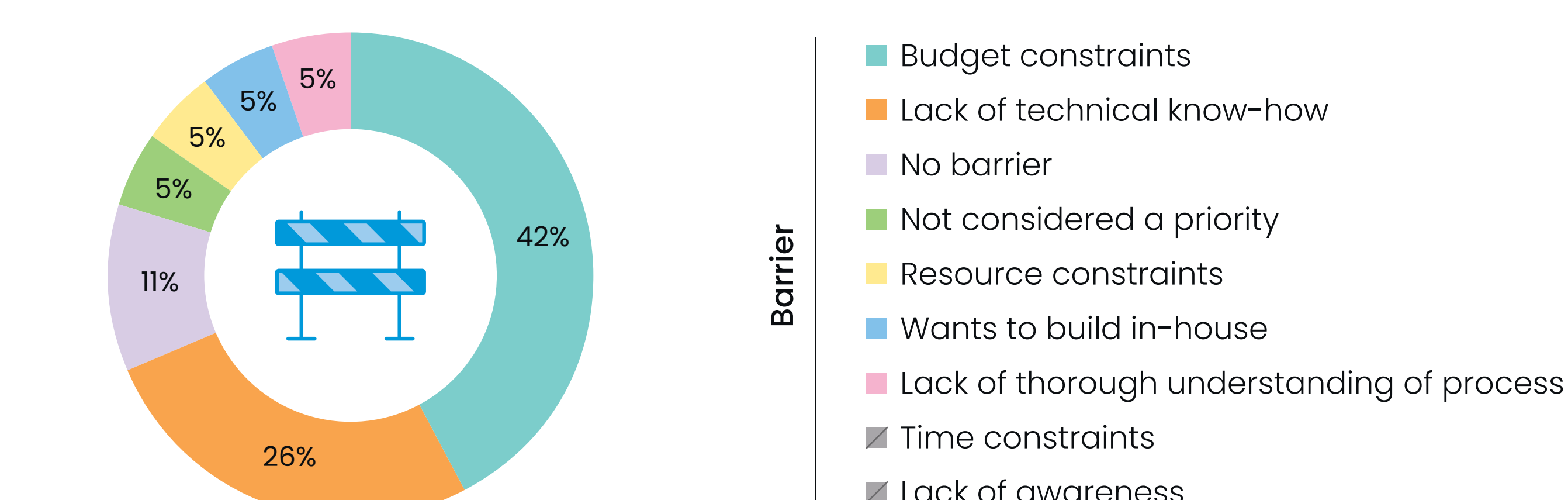
Figure 1. Digital projects initiated in the last 2 years



Q: Which of the following best describe digital projects you or your team/department have commissioned in the last 2 years? (Select multiple)

- When asked for reasons for barriers to digital transformation, budget constraints (**42%**) and lack of technical know-how (**26%**) were reported (**Figure 2**).

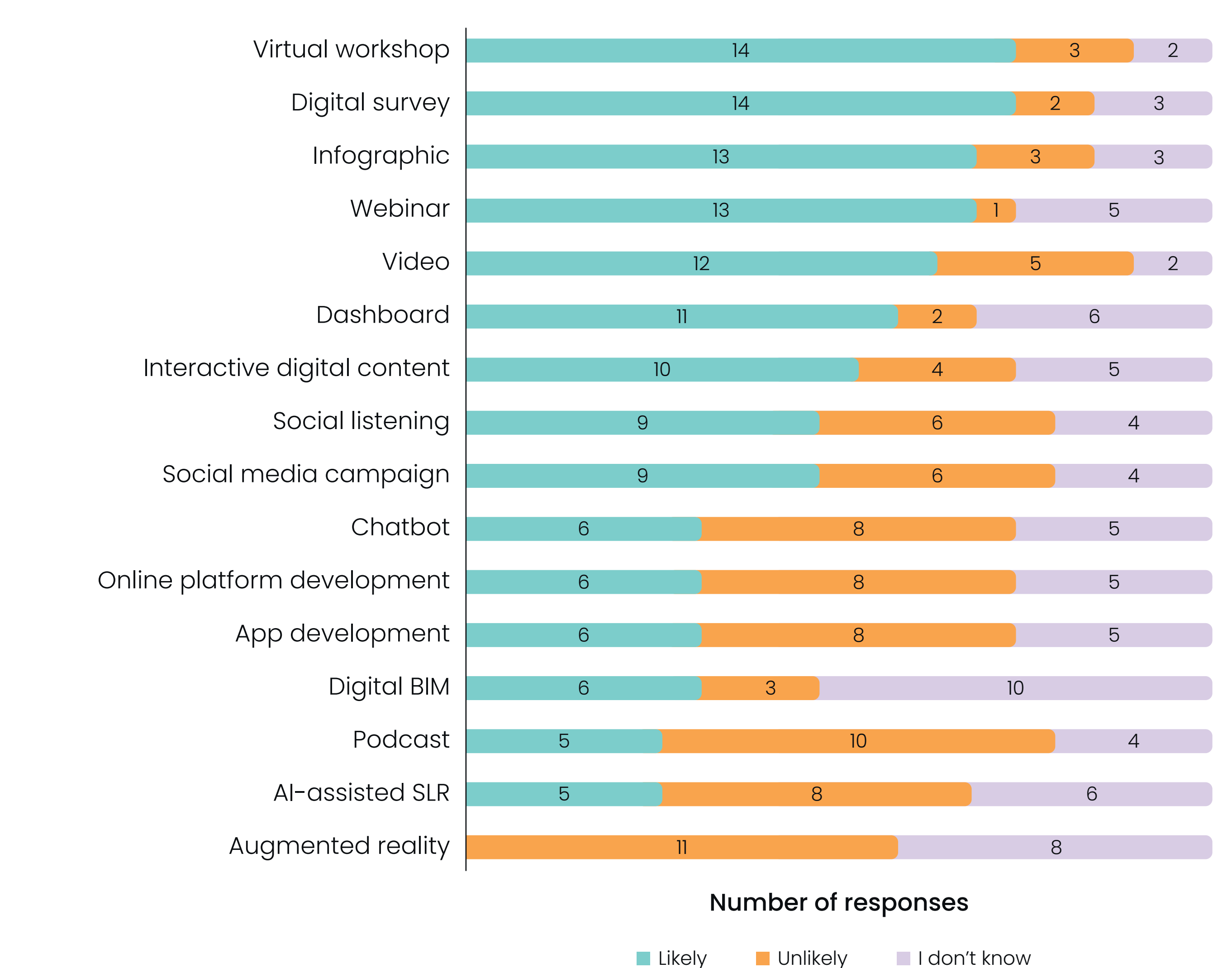
Figure 2. Greatest barrier to initiating digital projects



Q: What, if any, is the greatest barrier restricting you from commissioning digital services/products? (Select one answer)

- Of the digital media tested, the greatest future interest is shown in **virtual workshops, digital surveys, infographics** and **webinars**, with **>60%** of respondents favouring them (**Figure 3**).
- Other digital services, products or tools of interest included videos, dashboards, interactive digital content, and social listening (**Figure 3**).
- Most respondents (>70%) were less interested in newer tools like AI-assisted SLRs and augmented reality (**Figure 3**). This indicates uncertainty around the application or relevance of these tools to HEOR/market access work.

Figure 3. Future interest in digital products or services



Q: In the next 1–3 years, how likely are you to commission the below digital services or products? (Select 'Likely', 'Unlikely', or 'I don't know' for each option)

AI, artificial intelligence; BIM, budget impact model; SLR, systematic literature review.

Conclusions

- HEOR/market access professionals increasingly value and utilise digital products and services to communicate with their internal teams and external payer audiences.
- Opportunities remain to support HEOR/market access communications through the increased use of digital media, especially for those with budget constraints and lack of technical know-how.
- With seemingly advancing technical knowledge among payer audiences, it is likely this digital transformation is well under way.

Limitations

- Relatively small sample size but research is qualitative and directional.

Reference: 1. O'Leary S et al. *Value & Outcomes Spotlight*. 2023;9:21–24.

Disclosures: All authors are employees of Prime.

