

Point of Care Communication Council

2021 Year in Review Transcript

Welcome Video

Hi and welcome to the Point of Care Communication Council Year End Update.

I'm Nicole Divinagracia and I'm the Executive Director.

There was much uncertainty at the beginning of the year as the industry continued to evaluate the impact of COVID.

As we look back over the last year, I am pleased to report that 2021 brought improvements at the Points of Care. In addition, the PoC3 has made significant changes that demonstrate our commitment to growing and advancing the Point of Care channel. We have some big news to share after the new year so please stay tuned for more updates from me. In the meantime, here are the highlights from the past year. For additional details please visit our website at poc3.org.

Marketplace Highlights

2021 brought improvements at the Points of Care:

- In 2020, in person visits to the doctor fluctuated by specialty and demo. However, when analyzing claims data, we see in-person visits returned.
- And now that patients are back, most of them are spending some time in the waiting room.
- Although wait times are a bit lower than pre-covid, this location is still relevant to engage with patients.
- More offices are also displaying materials again, but some are modifying how they display them with protocols on only taking "one" copy, remaining cautious about the spread of COVID. This demonstrates that HCPs know the value of educating patients but want to distribute them in a safe manner.
- Research from Predict Health shows that when patients interact with health media, they take action.
- And because of these actions, we are seeing positive performance when evaluating POC as part of marketing mix models.
- ZS conducted approximately 180 marketing mix analyses for plans with POC from July of 2020 through July of 2021 and found that Blockbuster brands with targeted POC campaigns saw the strongest ROI during COVID.
- Pharmacy programs that were measured by Retail Intelligence also proved to be effective to reach patients in a relevant setting and when they are in the right mindset.

Industry Leaders Speak Out

For the first time, the PoC3 met with 30 agency and client leaders to gain insights on the POC channel. These insights were then used to inform the direction of the strategic plan.

This association aims to become the leading voice in the industry, but not without the support and participation from our members and Industry Advisory Council. It is critical that all stakeholders are aligned when decisions are made that impact this channel.



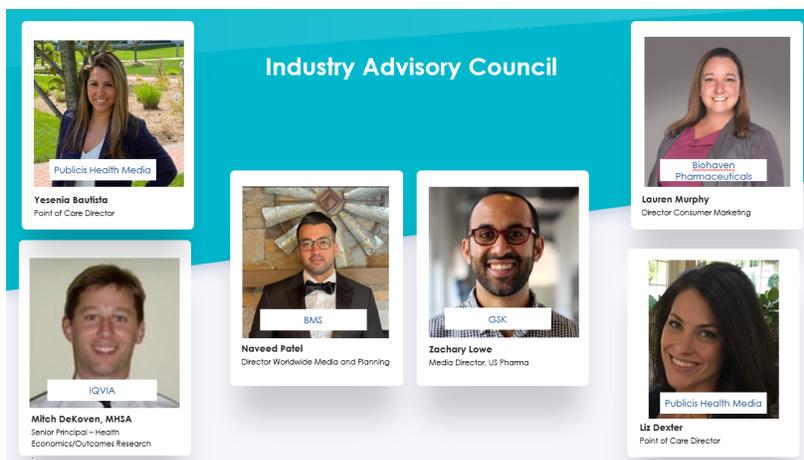
New Members

I'm proud to announce our two newest PoC3 members, Rapport and Publicis Health Media. In addition to becoming members, both agencies will have representation on our newly expanded Board of Directors.

We are thrilled to have Sarah Bast and Laura Brandes join our PoC3 Board of Directors.

Industry Advisory Council

Our Industry Advisory Council is also growing. We added 6 new members who all bring with them a wealth of knowledge, with industry experience at leading pharma, media, and research companies. We look forward to working with them as we shape the future of POC.



Verification and Validation Guidance

The work of the IAC and our members came to life when we published the Verification and Validation Guidelines and this year, I am pleased to report that the PoC3 has awarded the Certification Seal to nearly 40 product lines across media companies. These guidelines provide a standardized approach for auditing to ensure agencies and clients have confidence in where they are investing their money, which

is a huge turning point for our industry. It provides the trust and transparency that we have all been seeking in this industry.

Please refer to our website for the full list of product lines that are certified, including our latest recipient, the printed patient guides from The Wellness Network.

Also, please be sure to download the latest version of our Verification and Validation Guidelines on our website. Minor changes were made that impact the certification process for media companies, but the entire audit process remains the same. We will continue to review the guidelines annually to ensure they include proper verification for new offerings, while meeting the needs of the industry. If needed, the guidelines will be re-published each Spring to address these areas.

Members Expand Offerings and Produce Valuable Resources

Aside from auditing, we stand behind the efforts that our member companies make to expand offerings and provide valuable resources for the POC channel.

- Mesmerize is pleased to announce a new partnership with VSee, a company that specializes in digital telehealth platforms offering video visit, medical exam, and remote patient monitoring services. The partnership provides an additional platform for Mesmerize's advertisers to reach patients and healthcare providers and gives the pharmacies and doctors' offices within Mesmerize's network telehealth solutions and the ability to offer remote patient monitoring services.
- For example, Phreesia conducted a report that explores how pharma can support 53 million caregivers as 40% of their survey respondents said they're not equipped with enough resources to provide optimal care.
- A recent whitepaper by Health Monitor focuses on the impact of print vs. digital by analyzing qualitative factors such as trust, comprehension, retention, and emotional engagement. This piece also demonstrates the success of POC print marketing campaigns across therapeutic areas.
- PatientPoint recently launched an initiative with the American Academy of Pediatrics to offer COVID19 Vaccine Education in Pediatrician offices. This demonstrates their commitment to provide solutions that create a more effective doctor-patient dialogue.

Save the Date

Please be sure to save the date for our upcoming PoC3 event. On 3/10 we will host our first in-person summit since COVID. Invitations will be sent out soon and you won't want to miss it!

Closing Video

Thank you for viewing our Point of Care wrap up for 2021.

As we head into 2022, the Point of Care landscape will continue to evolve as the opportunities for patient care expands. Our focus for next year will be on education, to ensure you have the resources you need to educate patients, caregivers, and HCPs. We're ending this year with big plans for the next so stay tuned for an important announcement from us early next year – it will truly be a turning point for our industry!

Happy Holidays and best wishes for a healthy and productive 2022.