

Learning to fly

Healthcare communicators can help pharma rise to meet the market access challenge

Historically, a pharmaceutical company only needed to answer three essential questions to achieve reimbursement for its products: Is it effective? Is it safe? And is it of sufficient quality? The modern, efficient world presents a new question: Is it good value for money?

In these times of significant annual budget deficits and mountainous national debts, austerity measures are being implemented globally and governments are scrutinising healthcare costs to ensure economic feasibility. Increasingly, the power is with the payers, who value medicines which treat a clearly defined group of patients, or whose use will lead to savings elsewhere in the system, enabling them to make best use of their budgets. As a result, market access teams no longer provide a supporting role but fundamentally contribute to product strategy throughout the lifecycle in order to ensure that the best case is ultimately presented in pricing and reimbursement negotiations.

A medicine that demonstrably improves patients' quality of life has inherent value to payers, physicians and patients. The role of market access is to communicate this value to the range of customers who will affect its adoption. Today, that's not just physicians, but budget holders, policy holders, national and local decision-makers and, in some cases, political bodies, so targeting the message to the appropriate group is essential. Understanding the interplay between the effect of the product on the healthcare system and the impact of the healthcare market on the product is a further layer of the market access remit.

A senior market access manager, from a large pharma company (not named for confidentiality purposes), said: "Despite the complexity in gaining market access for pharmaceuticals, our ultimate goal is to ensure the technology we develop is accessible to the appropriate patients in need. We achieve this key objective through clear, concise and effective communication of our value messages to our target stakeholders."

Taking the payer perspective

Traditionally, pharma communications with stakeholders have been segmented into three 'product-centric' areas: medical, marketing and market access. Now, these areas need to integrate more in order that preclinical strategies capture, and cater for, the future needs of market



access gatekeepers. The value case needs to be integral to the overarching strategy and plan for a compound to ensure it has the best potential for reimbursement at launch, since payers and physicians increasingly demand real-world data to augment and demonstrate the value of a product.

Pharma needs to identify which evidence ensures a convincing data-driven value proposition and how best to present this evidence. Market access teams need to map how payers think, and what motivates them, to be able to influence their decision-making. For example, 'real-world data' advisory boards help to understand the type of data requested by payers, review existing data, and identify where further research is required.

Pharma should always keep the payer perspective in mind – this means thinking of economic valuation early during the planning, decision and strategy-making process, eg, designing trials with clinical, economic and patient-sided end points. Furthermore, a forward-thinking market access strategy should also predict accurately what the payer landscape may be in three to 10 years' time, when a new chemical entity might come to market, in order to have the best data for a convincing value case.

Market access customers

Insurers
National and regional health authorities
Commissioners
Prescribing advisers
Directors of public health
Health technology assessment agencies
Heads of pharmacy
Hospital/health authority directorates
Disease-specific market access customers, eg, cancer network director.

From molecule to market

The communication of a product's value by pharma to payers requires strategic partners whose knowledge is both deep and broad. An understanding of the core science and therapy area, as well as marketing strategies and the concerns of payers, is integral to understanding and developing a value proposition from the ground up successfully. Specialist healthcare communication agencies who fully understand the scientific data on a product, from the mechanism of action to the analysis of clinical trials, are able to identify and present the right data to answer payers' questions. For example, if a cost-benefit proposition is based on end-of-life care but quality-of-life data is not available, they can strengthen the argument with benchmarking and a clear product rationale.

There are also new internal pharma personnel and



What payers want to know

- What outcomes will actually be achieved for this patient population?
- What outcomes have already been achieved?
- What is the evidence and rationale for a product's price?
- Which product attributes could plausibly justify a premium price?
- What are the short-term and long-term benefits for patients and the budgets?
- What is the product impact on patients' QoL and productivity?

What pharma should communicate

- Knowledge of the current resource use for the clinical condition treated by the medicine
- The impact of the product on clinical outcomes and use of resources in managing the patient
- What differentiates the product from the standard of care or future competitors, and what attributes offer the best clinical and economic value?
- The inherent product value at launch and throughout its lifecycle.

departments whose role it is to evaluate and construct value-based pricing and reimbursement strategies. These internal specialists are able to amalgamate scientific understanding, health-economic data and real-world applications of products beyond the data from traditional randomised controlled trials.

Think new media

New media have revolutionised how we communicate, consume information and interact in the virtual and real world. In recent years, medical education and promotional activities have taken exploratory steps in the arena and the market access teams are following suit.

The challenge facing market access teams is how to provide the wealth of evidence supporting a particular product's value to a highly defined target audience without the narrative becoming confused and fragmented. The sheer volume of competing data and therapy area information that stakeholders are required to analyse mandates that the modern market access team is able to present the best evidence-base in an accessible and intuitive format. Getting away from large hard-copy dossiers of supporting materials and Excel HECON models, tactical e-media should be utilised to deliver this evidence and guide the audience on a journey through the product story, ultimately leading to a positive conclusion for the product based on the right supporting data. Moreover, tools of this nature can fully integrate all HECON models in a much more interactive and malleable fashion, leading to clear scenario-planning opportunities. Additionally, 'packaged initiatives' with patient advocacy groups to embrace the emotional patient experience, using social media to increase interaction between patients and specialists, and providing useful informational apps and tools for physicians can help to prepare a receptive healthcare environment that recognises the benefits of the product.

The times they are a-changin'

The market access environment for medicines is changing rapidly, and there's no going back. Pharma must adapt and evolve its thinking, planning and strategies to include

a payer perspective from the initial proof-of-concept through to Phase III trials and beyond. This will require effective foresight, corporate buy-in and partnering with external healthcare agencies that understand their product 'from molecule to market'. New media, too, will play a role in broadening and shaping the value proposition. It is an exciting future for those who see the new payer perspective paradigm not as a problem but an opportunity.

a quick look

The strategic and tactical challenges associated with taking a molecule from discovery to market can be overwhelming for pharmaceutical companies and their communications agencies. Traditional visible specialities, medical affairs and marketing, work tirelessly to educate, communicate and create a market for their products among prescribers. However, the world has rapidly changed in recent years and a more prominent customer has emerged – the payer. The payer is the last bastion between successful reimbursement and product adoption. Pharma must adapt its thinking and strategies to meet evolving payer needs, and work with agencies whose 'molecule to market' expertise can best present a product's value.

Comments from: a senior pharma market access manager.



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