

The Role of Market Research in SUPPORTING PATIENT CENTRICITY

A number of factors have come together in recent years to drive a transformation within pharmaceutical companies from being product-led to patient-centric:

1. Our ever-growing and aging global population is putting increasing pressure on healthcare systems, which need to decide how best to spend limited budgets.
2. Payers and policy-makers are demanding clear demonstrations of real-world value and positive patient outcomes for new medicines.
3. Physicians need support to make faster diagnoses and provision of treatments more tailored to individual patients.
4. Patients, exposed to a wealth of information, are becoming more informed and engaged in decisions about how they want to be treated.

This transformation is a welcome one that benefits all parties, but is also challenging for pharma. A patient-centric model demands huge investment and a company-wide com-

mitment to putting patient wants and needs first during all stages of healthcare delivery, from drug discovery through to long-term disease management.

The Voice of the Patient Along the Continuum

Market research is ideally placed to support pharma with this need for greater patient understanding throughout the stages of product commercialization. However, it's not simply a case of doing more market research with patients. It's about including the voice of the patient when considering any aspect of drug delivery or healthcare service provision, in early phase clinical development as well as when a drug is about to launch. It's about recognizing that not all patients are the same, and they won't all have the same needs or behaviors. Ideally, market research needs to deliver 360-degree insights from all key stakeholders with whom the patient will come into contact. Research should be designed in a way that more closely reflects the real-world situation. And the insights delivered from research, even if not among patients, must tell the story from the patient perspective.

Creating a 360-Degree View

Pharma companies are starting to recognize the need to involve the patient's voice at much earlier stages in the product lifecycle. We were recently asked to undertake research with patients at the clinical trial design phase in order to help inform trial recruitment and optimize endpoints. The insights were fed into trial design and allowed the pharma company to evaluate the adequacy of outcome measures from a patient perspective.

We must remember that while patients might have the same disease, they are also very different individuals. Being patient-centric means recognizing that, like physicians, patients have different attitudes, behaviors, and cultural backgrounds, and appropriate targeting is particularly important if manufacturers want to achieve global success with their brand.

We also have to be mindful of the fact that the world is changing rapidly — patients may behave differently in the future than they do now. It is likely that patients will increasingly

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engage with digital tools such as social media, mobile apps, and websites. But although these channels are increasingly used as part of pharma companies' engagement strategies, it is important to distinguish which channels are best suited to each patient type, and not to assume that all patients will be willing and interested in engaging with digital sources.

Other key stakeholders may not be as positive about digital tools either, which is why getting an integrated 360-degree view is so crucial. We managed a project where the client wanted to investigate demand for a mobile app tool to support patients with their disease management. While patients, particularly younger ones, revealed themselves to be very open to using apps and GPs also recognize the benefits, healthcare specialists were reluctant, expressing a number of concerns. The tool could be very successful, but to drive adoption, the manufacturer will need to be mindful of the opinion of all those involved in healthcare delivery, not just patients.

Adopting a patient-centric model will be a considerable challenge for pharma, covering issues beyond what we've been able to address briefly here. But it's a challenge that the market research industry welcomes and is well placed to support. ^{PV}

Editor's Note:

Research Partnership is hosting a patient research webinar on Thursday, March 30. For more information visit researchpartnership.com/news.

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