

Value Communication in Pharma
HEOR, RWE & Market Access:
2019 Insight Survey

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Executive Summary

Value communication (VC) is essential for a successful market access strategy aiming to bring interventions to patients. VC must focus not only on efficacy, but also on health economics and outcomes research (HEOR), market access, regulatory decision making, epidemiology, comparative effectiveness (CE), and real world evidence (RWE).

As a result, companies are placing increasing importance on their value communication strategies, and increasing their investment in creation of VC scientific and marketing collateral as well as their communication to stakeholders. Despite this, little research has been done on the challenges and opportunities in this field or with people involved in value communication and their training needs.

This white paper summarizes a survey conducted by HealthEconomics.Com to analyze the opportunities and challenges for > 170 global respondents in value communication. These respondents highlighted key issues preventing the development and delivery of effective value communication.

We describe effective value communication to diverse stakeholders with the goal of identifying tools and processes to improve market access and patient outcomes.

Value communication challenges include

Availability of value evidence

Communication of HEOR, RWE, and CE concepts

Communication of budget impact data

Tailored communication for different customer types

Ineffectively speaking to different customer types

Key Findings



Over **80%** of value communicators agree that **more training opportunities** are needed



16% of value evidence developers/translators agree that **value evidence and communication is not tailored to different customer types**



Patients are a target for value communication materials (40% of respondents)



17% of value evidence developers/translators agree that **value evidence and communication does not effectively speak to the customer**



21% of value evidence developers/translators agree that **value evidence is not readily available**



Only **36%** of respondents **outsource value communication materials** most of the time



20% of value evidence developers/translators agree that **HEOR, RWE, CE, and budget impact data are not effectively communicated**

ALLEVIATING THESE CHALLENGES WILL LEAD TO

- More successful market access
- Improved stakeholder relationships
- More effectively targeted VC materials
- Improved patient outcomes
- More training courses for effective VC

Methodology

A 34-question survey was designed on www.surveymonkey.com and circulated via email to the HealthEconomics.Com research community of 25,000 HEOR/RWE global stakeholders, as well as relevant LinkedIn groups involved in medical communications and HEOR/RWE

Responses were invited between December 20, 2018 - March 9, 2019

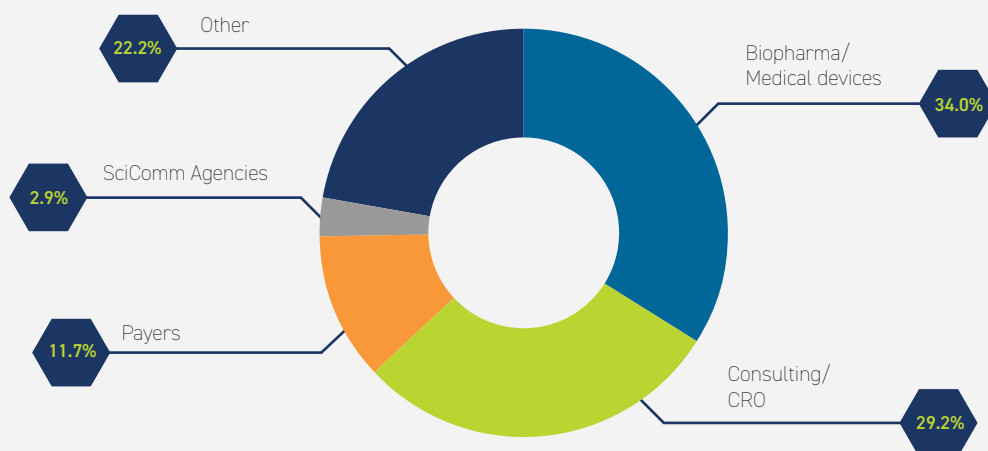
Survey questions were analyzed using univariate analysis

Three major groups were surveyed and analyzed: value evidence developers, value evidence translators, and value evidence communicators

The total number of respondents was 171 with 86 developers of value evidence, 45 translators of value evidence, 33 individuals who communicate value evidence directly to customers, and 7 value evidence receivers. This white paper will focus on the first three groups.

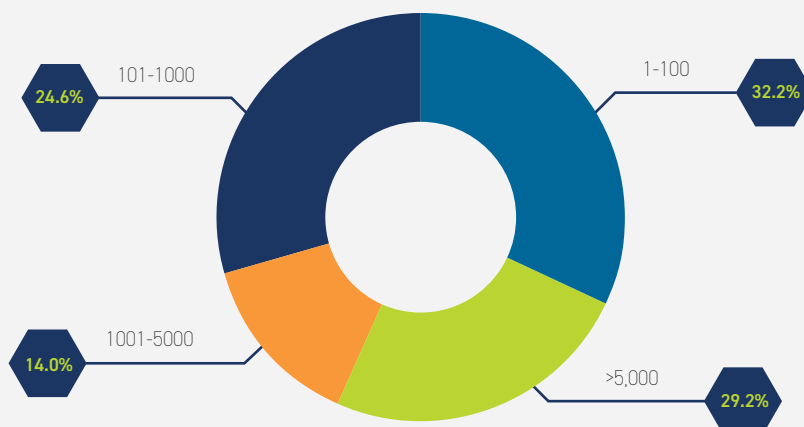
Respondent Demographics

COMPANY TYPE



Survey respondents were recruited from key influencers in the industry including biopharma/medical devices (e.g. Boehringer Ingelheim, Eli Lilly, GSK), consulting/CRO (e.g. Parexel, Evidera), payers (e.g. Optum), SciComm agencies, and others (e.g. academia, health technology assessment agencies).

COMPANY SIZE, NUMBER OF EMPLOYEES



Companies ranged in size from 1 to more than 5,000.

COMPANIES WERE FROM REGIONS SPANNING THE GLOBE



North America
70.2%



Europe
14.0%



Asia
9.4%



Central/South America
2.9%



Oceania
2.3%



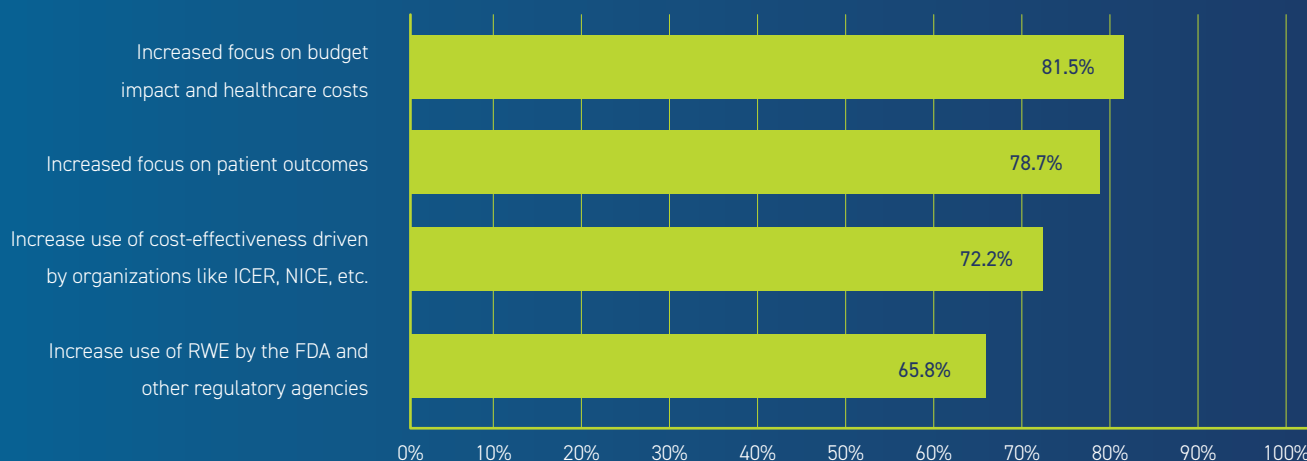
Africa
1.2%

Primary Job Function

Sr. Research Data Manager
 Lead, RWE Strategy
 Director, Market Access
 Director, HEOR
 Executive Consultant
 VP, Medical Value Communications
 VP, Real World Evidence
 Vice President Sales
 Pharmacist
 VP HEOR
 Senior Principal Consultant
 Emeritus Professor
 Key Account Manager
 Director, HEOR

Key trends are driving the increase in value communication

Value evidence developers and value evidence translators were asked whether the following trends increased the need for value evidence development and communication.*



* Respondents were asked whether trends greatly increased, increased, neither, decreased, or greatly decreased value communication. Shown are greatly increased and increased combined.

Value communication materials are developed for multiple audiences

Value evidence developers and value evidence translators were asked how often they develop value communication materials aimed at different audiences.* While providers continue to be the predominant focus for value developers, government or HTA agencies are a close second. Patients are also growing in importance.



PROVIDERS
74.1%



GOVERNMENT OR
HTA AGENCIES
69.4%



POLICYMAKERS
64.8%



PRIVATE PAYERS
63.0%



PATIENTS
39.8%

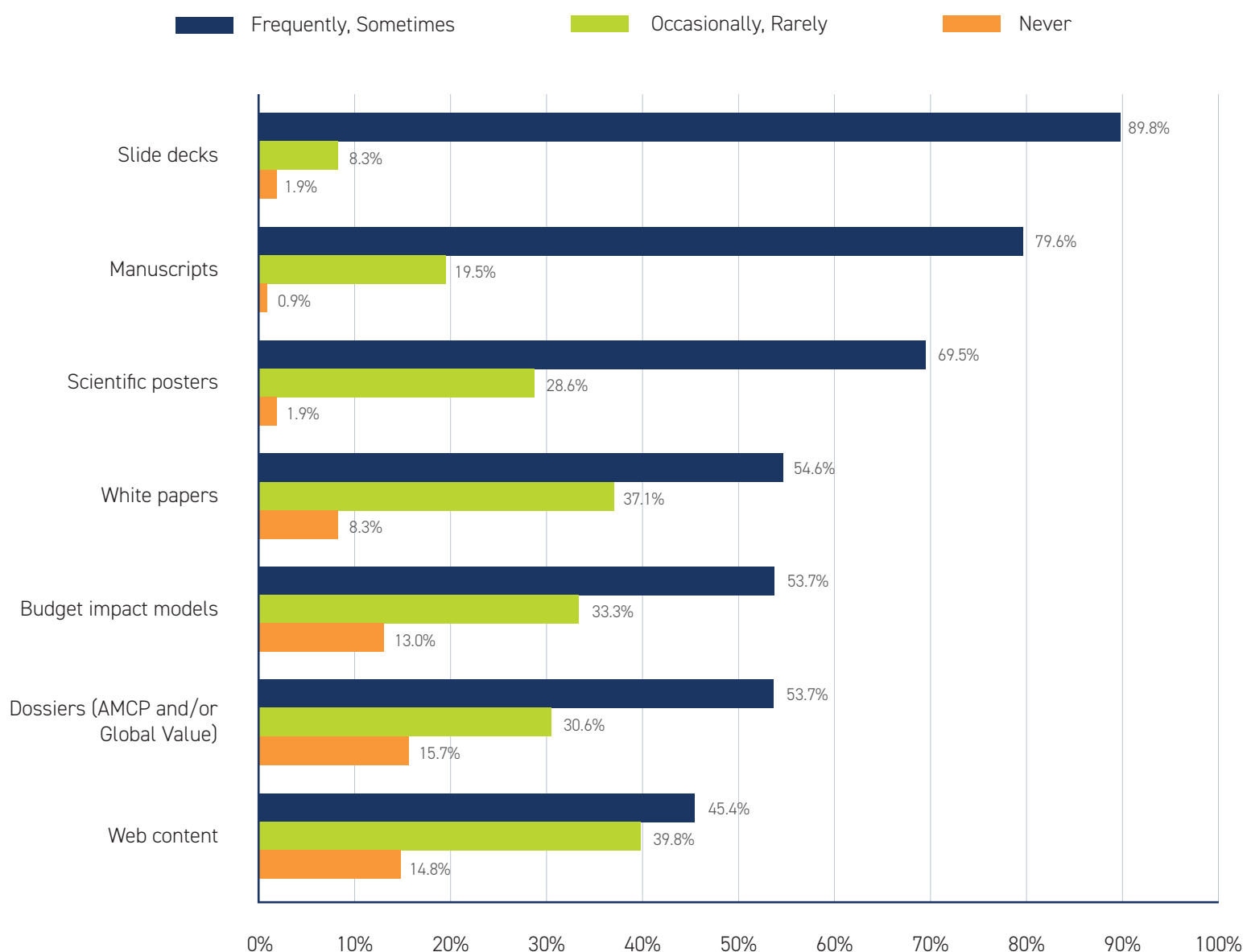
An Avalere survey found that, “[a key challenge is] how such [VC] can be effectively communicated to key stakeholders.” ⁴

Diverse tools are used to communicate value

Value evidence developers and translators most frequently use slide decks, manuscripts, scientific posters, budget impact models, and dossiers (both AMCP and/or Global Value).

However, with patients becoming an increasingly important target for value communication, an important question is whether these highly scientific tools are the most appropriate to communicate value to them. Tools must be adapted to the stakeholder receiving them.

Frequency of developing various value communication tools

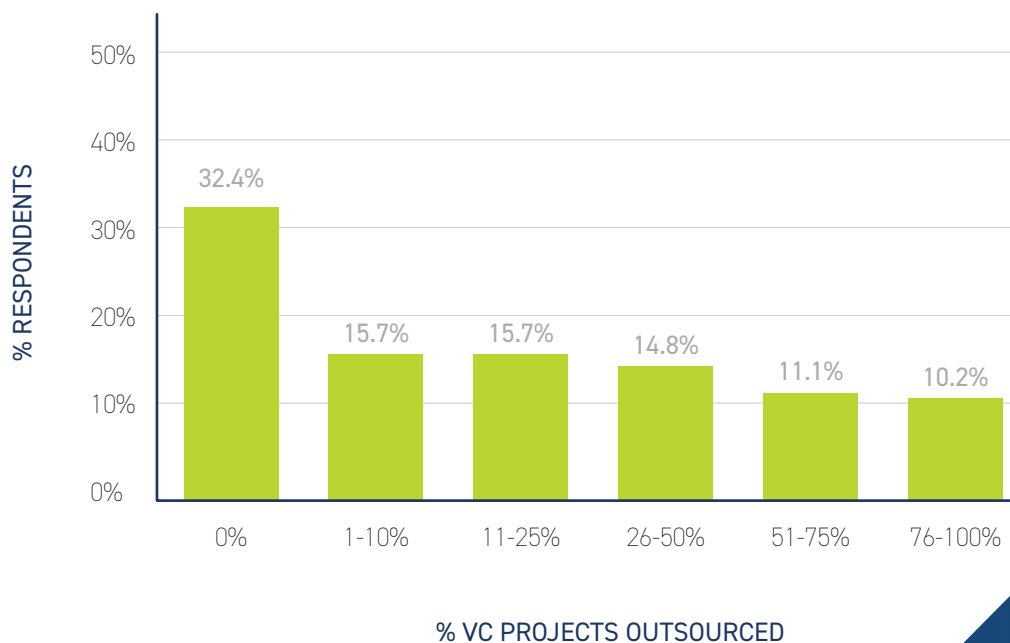


Value evidence communicators like Health Outcomes Liaisons (HOLs) and Medical Scientific Liaisons (MSLs) use a number of tools to communicate value to their targets (e.g., payers, patients, providers, etc.) including:

- Web-based “heat maps” of prevalence and cost data, stratified by geography or congressional district level
- Patient perspective data
- Gap analyses
- Simple costing tools
- Analytics tools, dashboards, interactive visualizations
- Social media content
- Mass emails
- Non-pharma funded studies confirming pharma studies

Outsourcing of value communication tool development is inconsistent

Overall, what percent of value evidence development or communication tool development do you outsource to outside vendors?



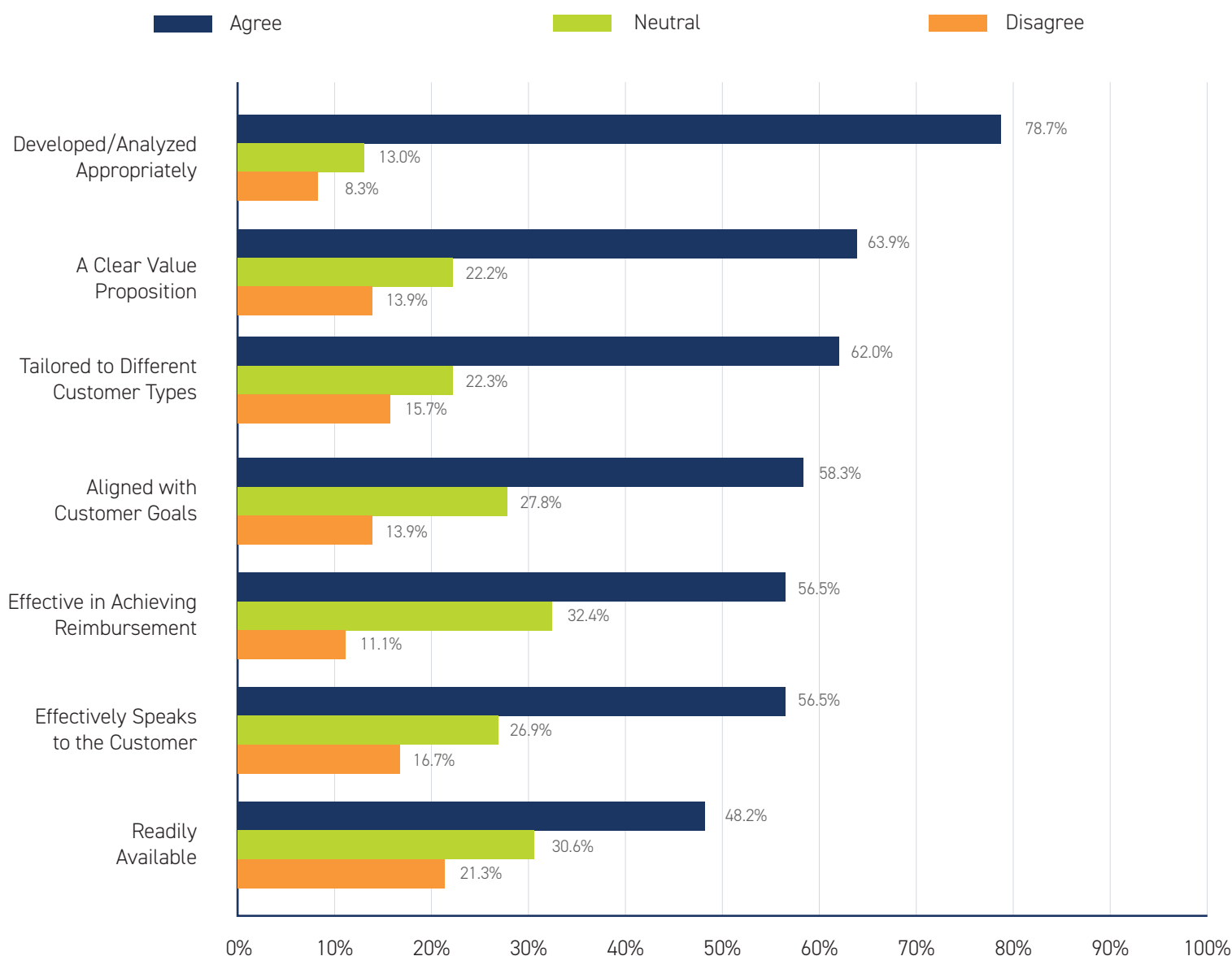
Relatively low outsourcing may be due to lack of expertise in outside companies in creating value evidence or a high number of in-house creators of value evidence.

It is certainly not due to a lack of the number of consulting companies, as they made up 23.5% of respondents.

Key Areas for Improving Value Communication

Value evidence developers and translators were asked for their views on a number of statements about value evidence development and communication.* While there were generally high levels of agreement that the data were developed and analyzed appropriately and tailored to the customer, twenty-one percent disagreed that value evidence was readily available and 16.7% disagreed that communicators could effectively speak to a customer about value evidence.* The areas of most need related to data availability and customer targeting.

An Avalere survey found that, “[a key challenge is] how such [VC] can be effectively communicated to key stakeholders.”⁴



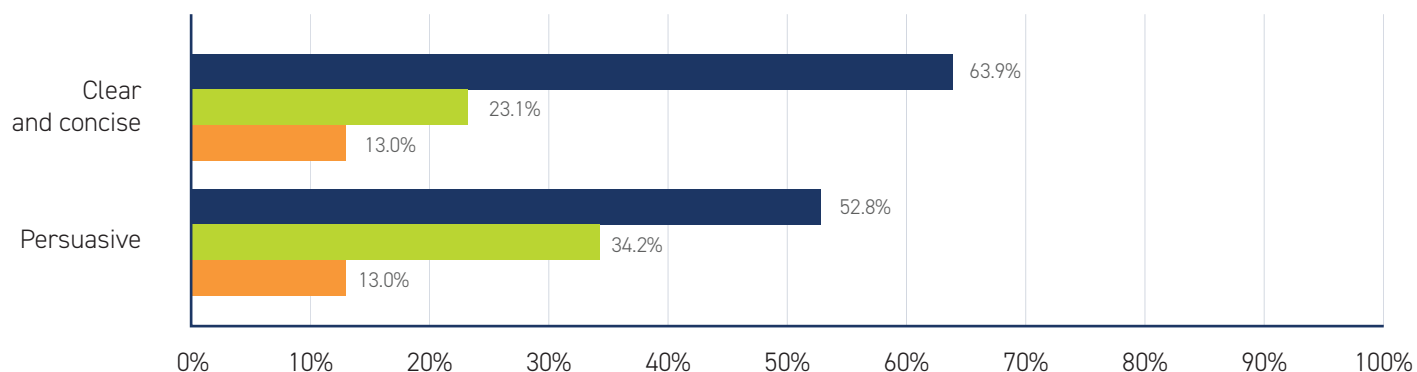
* Respondents were asked whether they strongly agree, agree, neither agree nor disagree, disagree, or strongly disagree with the statements. Strongly agree and agree, as well as strongly disagree and disagree are combined.

Agree

Neutral

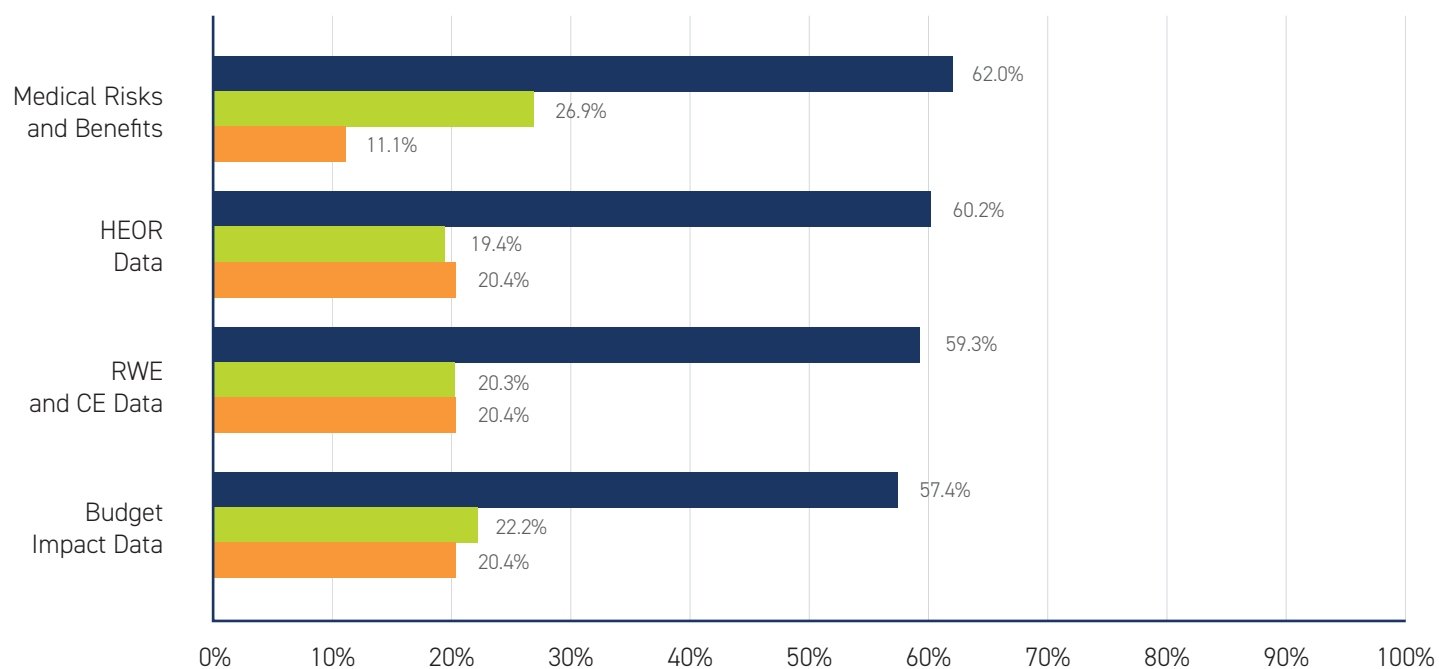
Disagree

Value communication tools are:



Respondents were queried as to what type of data was effectively communicated.

Effectively communicated:



Key needs in value evidence communication are:

"A salesforce that can transport the value proposition."

- Director, Global Health Economics and Market Access

"Clarity and improved access to value communications data in a timely manner."

- Healthcare Consultant

"Translating benefits in terms customers readily understand."

- Executive Director and Head, HEOR USMA

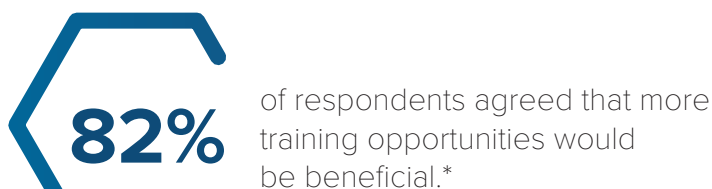
"Extremely brief, concise, engaging, informative, and impactful communication tools."

- VP HEOR

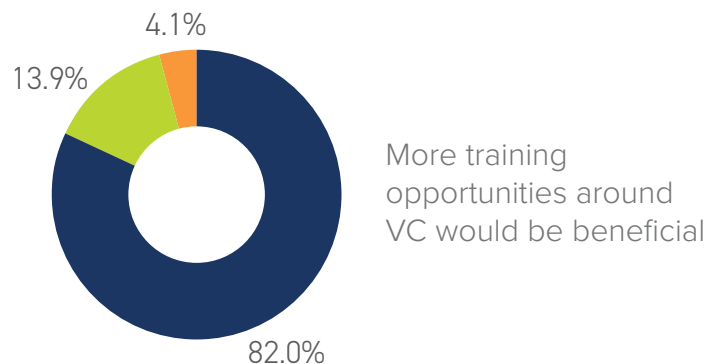
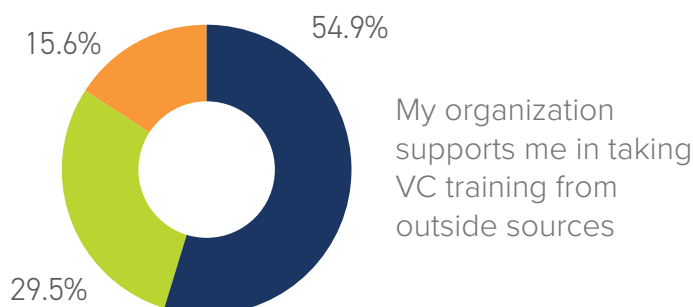
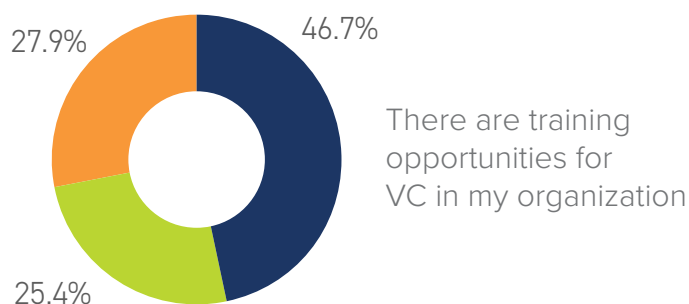
"More experienced writers and editors in value communication."

- Head of Marketing, Communications or Advertising Agency

More training for value communication is essential



Agree Neutral Disagree



* Respondents were asked whether they strongly agree, agree, neither agree nor disagree, disagree, or strongly disagree with the statements. Strongly agree and agree, as well as strongly disagree and disagree are combined.

Key challenges in value evidence communication are:

"Efficient access to data."

- Vice President, Real-World Evidence

"Complex concepts, analyses, and methods are not easy to communicate to end users."

- VP HEOR

"Finding strong writers, as well as relevant data for all scenarios."

- Director, Value Communications

"Lack of qualified writers to subcontract projects to."

- Freelance Medical Writer

Many value communicators have attended no VC trainings

Value communicators were asked what types of value communication trainings they have taken part in. Many responded that they had taken part in none.

In a survey conducted by the MSL Society, 70% responded they had received no presentation skills training and 80% had received no communication skills training although 80% expressed interest in such training. ⁵



[We need] free webinars, affordable short courses, affordable/free conference seminars. So much of the training programs are too expensive given the content/value of the program.

Senior Associate, HEOR

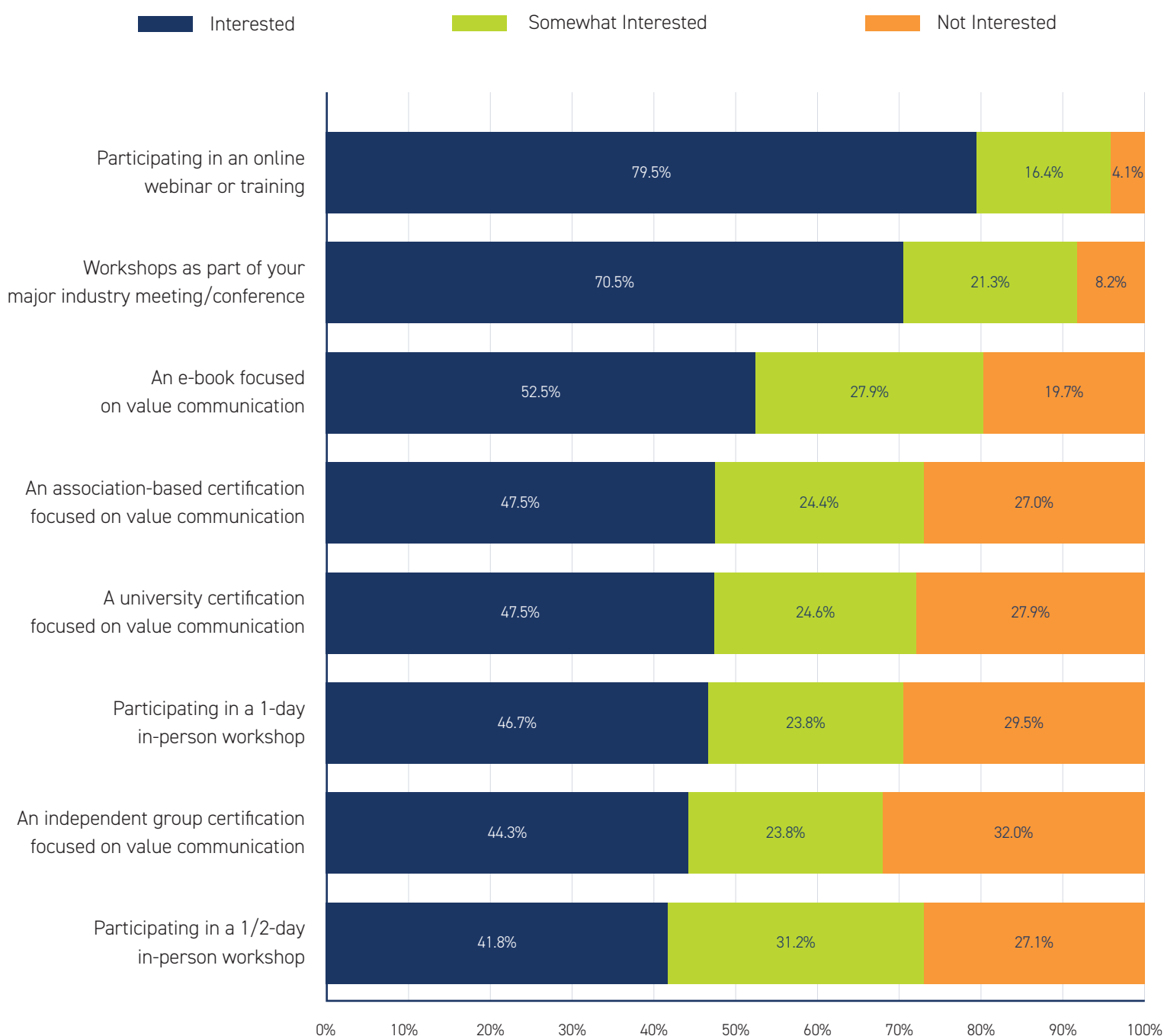
There was interest in a wide range of training areas

There was a clear focus on technical training areas although training needs included customer-centricity and writing skills. Value communicators were most interested in training focused on RWE and CE, HEOR, impactful value communication, translating data into the customer's language, and concise value communication.



There was interest in multiple types of learning opportunities

A number of different learning opportunities were assessed by value communicators to determine level of interest. The most popular included an online webinar, a workshop as part of a conference, and an e-book focused on value communication.*



* Respondents were asked whether they were very interested, interested, somewhat interested, not so interested, or not interested. Very interested and interested are combined.

Conclusion

Value communication is powerful in reaching payers, providers, patients, policy-makers, and HTA agencies to show them the efficacy and value of medicines with the ultimate goal of increasing access and improving patient outcomes. Key to its success are both developing and translating the evidence and communicating it effectively to customers. More attention must be paid to the challenges and opportunities to effective value communication, as well as to finding solutions to these barriers, including offering sufficient training to support the needs.

About HealthEconomics.Com

This white paper was developed by HealthEconomics.Com, the world's largest digital CONNECTED COMMUNITY™ for HEOR, RWE, and Market Access stakeholders.

HealthEconomics.Com provides business development, strategic consulting, and market research services for the global value demonstration arena. If you are interested in better understanding or connecting with this audience, contact us.



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Preferred news source for HEOR, RWE, MA



Targeted: 79% HEOR, RWE, MA



Audience: BioPharma/ Med Device, CRO/ Consultancy, Payers/ HTA, Academia

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