

UNDERSTANDING DRIVERS OF PATIENT ENABLEMENT: PHARMACEUTICALS AND THE ENGAGED CONSUMER

By Marc Tomassi

Patients are more engaged in healthcare decision-making than ever. New medical technology, greater therapeutic choice, the burden of out-of-pocket costs and the availability of digital information are empowering patients to take a greater part in healthcare decisions.

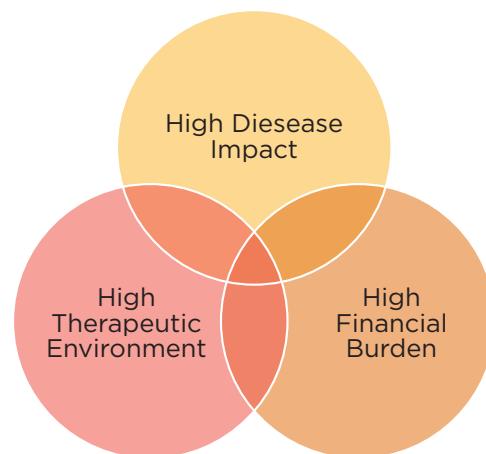
Pharmaceutical companies have noticed, bringing patient centricity and the patient voice into their businesses. Within research and development (R&D) patient-reported outcomes are being included in late-stage clinical trials. For commercial teams, mapping “patient journeys” through the care continuum is standard practice. Going beyond the industry’s legacy initiatives (e.g., disease education, patient support and financial assistance), pharmaceutical companies are using technology to improve health outcomes and the overall patient experience. Mobile apps, device-implanted sensors and virtual connectivity are aiding compliance monitoring, utilization data collection and integration, and other beyond-the-pill programs.

However, not all markets present an opportunity to enable patients. Just as the intensity of patient engagement in choice varies by clinical circumstance, so too does the opportunity for pharmaceutical companies’ patient-targeted efforts. To maximize the effectiveness of efforts, pharmaceutical companies should identify those situations that are optimal for patient centricity.

To do so, assess situations based on market attributes and factors that drive consumer activation.

MARKET ATTRIBUTE	FACTORS THAT DRIVE CONSUMER ACTIVATION
Level of Disease Impact	<ul style="list-style-type: none"> Chronic conditions requiring ongoing management Relatively severe symptoms/manifestations Relatively invasive and/or frequent clinical interventions Significant impact on patient's quality of life
Disease Financial Burden	<ul style="list-style-type: none"> Significant patient out-of-pocket costs relative to expected outcome
Therapeutic Environment	<ul style="list-style-type: none"> Availability of efficacious and tolerable products Availability of multiple therapeutic options

THE RIGHT ENVIRONMENT FOR PATIENT ACTIVATION PROGRAMS



The higher the burden of any of these three elements individually, or the more of these factors that co-exist in a given market, the higher the likelihood that patient targeted programs will be effective.

At one extreme are chronic diseases with severe symptoms, frequent clinical interventions and great impact on a patient's quality of life. There are a wide variety of treatment options available, each carrying an out-of-pocket burden. Such diseases represent an opportunity for patient targeted programs.

Solid organ or stem cell transplants, for example, fit this profile. Transplant patients face significant clinical and quality of life burdens throughout the treatment continuum, which spans multiple disease stages: diagnosis/pretransplant, peritransplantation and posttransplant. Patients and clinicians make numerous decisions and choices throughout the continuum, but those choices are not simple. So complex is the clinical and financial decision-making process that clinical nurse and financial coordinators become integral to the treatment team. Given this criteria, organ and stem cell transplants are an ideal market for patient activation programs.

By contrast, imagine acute conditions in which immediate survival and risk management are the primary concern. In these cases, optimal therapeutic selection and quality of life are less important than sheer survival. Following a heart attack, for instance, most patients will be prescribed an oral anticoagulant. They will likely not be involved — or interested — in selecting which medicine to take while recovering from such an event. Such markets are less than ideal for patient-centered activities.

Sometimes factors counterbalance each other and patient-centric efforts make little sense despite the existence of drivers that would imply otherwise. In the antipsychotics market, for example, the disease burden for patients and families is substantial and there are numerous treatment options available. However, most therapies are now generic and inexpensive and treatment decisions tend to be less complicated and impactful. Additionally, the realities psychosis manifestations present a more difficult market opportunity for patient centricity.

Weighing Clinical, Financial and Competitive Factors

When considering patient-centric investments, pharmaceutical companies should consider a mix of clinical, financial and competitive criteria. The relative importance of each characteristic should be weighed based on the dynamics of each market. As a general rule, the higher the burden of these elements individually or the more factors that coexist in a given market, the higher the likelihood that a patient activation program will make sense.

Key Takeaways

To be successful in the evolving healthcare market, organizations must:

THINK DIFFERENTLY.

Evaluate the disease from the patient's perspective to determine if patient engagement would be effective.

PLAN DIFFERENTLY.

Make characterizing and prioritizing across the portfolio a core element of market and innovation planning early in the R&D process.

ACT DIFFERENTLY.

Use detailed patient profiles and digital tools to engage with patients beyond traditional methods of communication.



huronconsultinggroup.com

© 2017 Huron Consulting Group Inc. and affiliates. All Rights Reserved. Huron is a management consulting firm and not a CPA firm, and does not provide attest services, audits, or other engagements in accordance with standards established by the AICPA or auditing standards promulgated by the Public Company Accounting Oversight Board ("PCAOB"). Huron is not a law firm; it does not offer, and is not authorized to provide, legal advice or counseling in any jurisdiction. MU 171089