



PATIENT FOCUS = PHARMA PROFITS

ENGAGE PATIENTS AND PROFITS WILL FOLLOW

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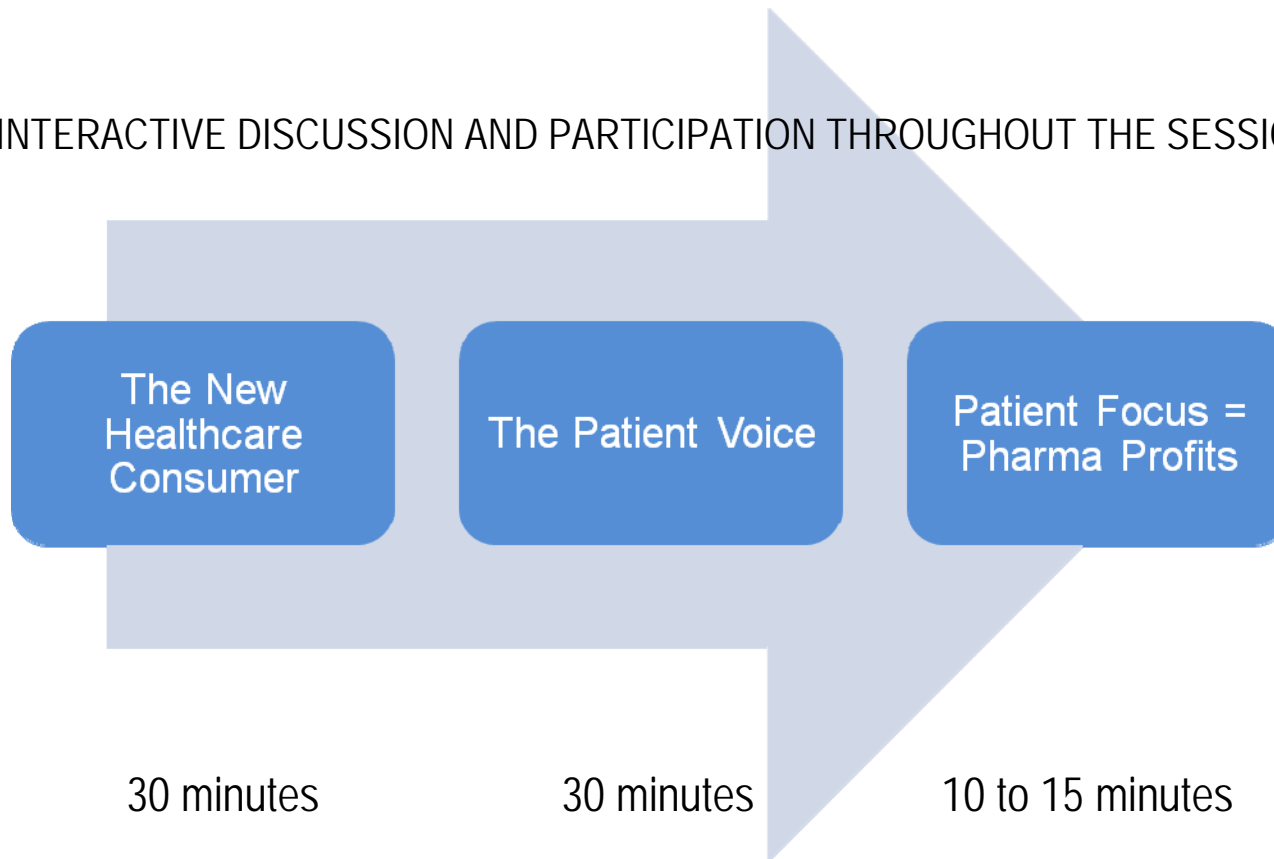
DAWN RICHARDS

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SESSION OVERVIEW

INTERACTIVE DISCUSSION AND PARTICIPATION THROUGHOUT THE SESSION



Do you agree that patient focus and Pharma profitability can go hand and hand?

- A. Yes
- B. No
- C. Not Sure



PATIENT FOCUS = PHARMA PROFITS

The New Healthcare Consumer

Anne Marie Wright

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Canadian Association for People Centred Health

Acting Executive Director



ALL THIS “NEW” TALK ABOUT PATIENTS, CONSUMERS, PEOPLE...

Patient-centric:
The 21st Century prescription for healthcare.

Patient Engagement is the Blockbuster Drug of the Century

The CMA has called for implementation of a strategy for **Patient Centred Care** within a national framework

Power to the People.
Move from Disease Care to Healthcare.
Empower patients to manage their own health.

Patient Centred Care is increasingly the focus of reforms and initiatives across the healthcare spectrum.

Healthcare Consumerism
Consumer Driven Healthcare
More engaged healthcare consumers

Designing a **People-Centred Health** System for all Canadians

**Within your organization over the past year,
how much emphasis has been placed on
better understanding your patients/consumers?**

- A. A lot more
- B. About the same as it's
always been
- C. Not very much

Does your organization have a clear understanding of what it means to be patient-consumer-centred?

- A. Yes
- B. No
- C. Not sure



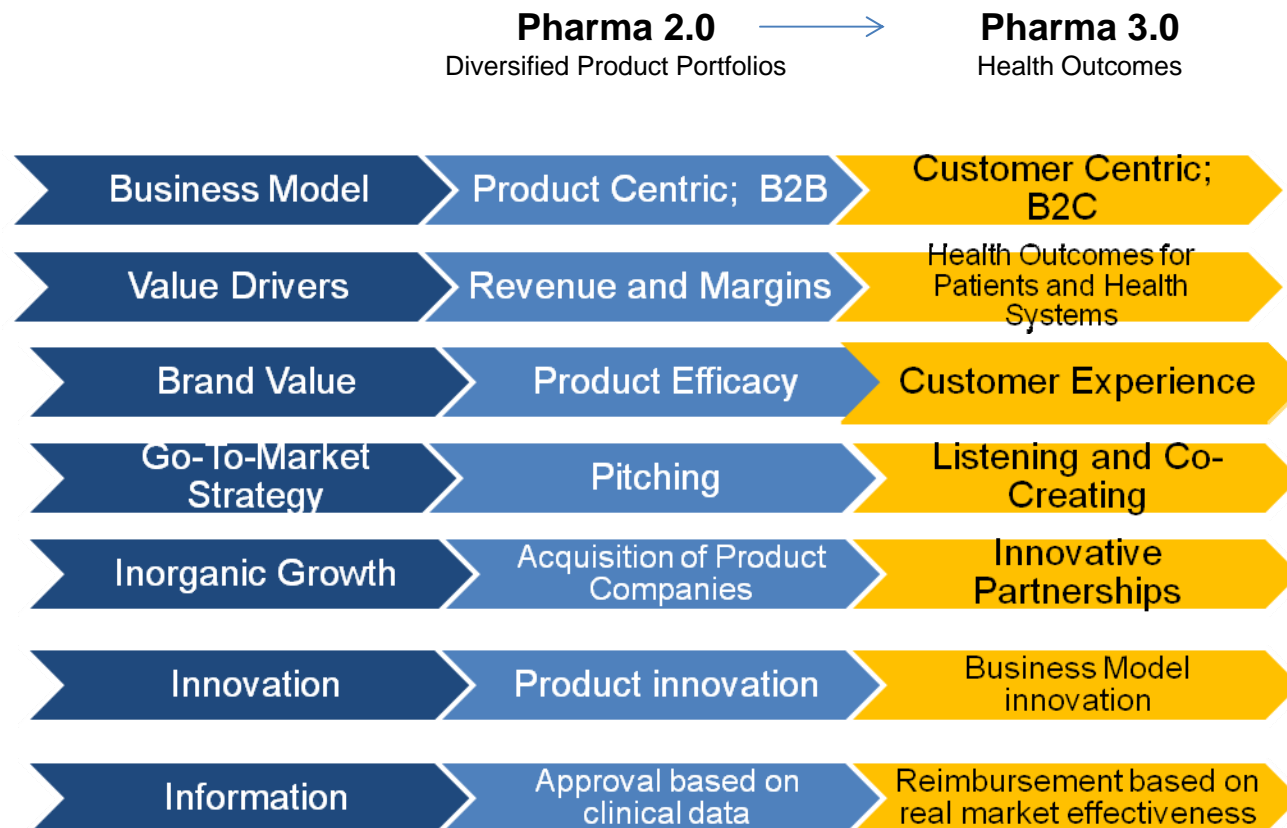
WHY IS THIS INCREASED FOCUS ON PATIENTS
AND CONSUMERS SO IMPORTANT?

Where is this all coming from?



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Ernst & Young Progressions 3.0 Report 2012



“How can we maximize Pharmaceutical Potential in the Pharma 3.0 Environment”

“ Access to information and opportunities to communicate in new and different ways have strengthened health literacy, defined as the working knowledge and language of healthcare.

Global populations, particularly those in developed nations are emerging as informed consumers of healthcare, rather than passive recipients who simply “follow doctor’s orders”.

Increasingly, people decide for themselves whether they will follow the prescribed care they have been given, and readily seek advice and information on health issues from a variety of sources beyond their primary health provider.”

EMPOWERED PATIENTS = SELF MANAGING PATIENTS = BETTER HEALTH OUTCOMES

Self-management involves engaging in activities that protect & promote health, monitoring and managing symptoms & signs of illness, managing the impacts of illness on functioning, emotions and interpersonal relationships and adhering to treatment regimes.
(Gruman & Von Korff, 1966)

Patients who self-monitor their condition have been shown to have better outcomes. Self-care programs aim to increase the interest and involvement of people in their own care, and by doing so, empower them to manage their condition.
(WHO, 2010)

THE NEW HEALTHCARE CONSUME



- **“It’s All About Me”:** The Personalization of Health Systems
- **Ivey International Centre for Health Innovation. February 2014 White Paper.**
- *10 Steps Health Systems can take to personalize their structures, services and care delivery models to achieve a personalized system that achieves value for the populations they serve.*



The Emergence of the Empowered Consumer.

“There is increasing evidence that not only are individuals ready to manage their own health and wellness, they are actively seeking out strategies and tools to take charge of their health and to change the way they access health services.”

Ivey International Centre for Health Innovation

Do you think that the average patient has become more savvy, sophisticated and demanding over the past decade?

- A. Yes
- B. No
- C. Not sure

WHAT ARE THE DRIVERS THAT ARE MOTIVATING AND INFLUENCING THIS TREND?

What are consumers thinking?

- ***Drive to learn and better understand health and wellness***
 - “I don’t want to wait to be sick”
 - Online mechanisms abound to increase health literacy
- ***Drive to engage and connect to other consumers***
 - Want to learn from people like me
- ***Drive to “take control”***
 - Information technology propelling people to become active participants in their personal health journey



WHAT ARE THE DRIVERS THAT ARE MOTIVATING AND INFLUENCING THIS TREND?

What are consumers thinking?

- ***Drive to “self manage” health information***
 - Increasing desire to make informed and educated decisions relevant to their personal needs
- ***Drive to ensure accuracy***
 - People who have access to, and manage their own health information are more likely to recognize changes or error in health data and to make the link between action and health outcome.
- ***Drive to collaborate with healthcare providers – not be simply recipients of care***
 - More informed consumers will continue to strive for a deeper engagement with the healthcare team of their choice.

HOW CAN WE PROVIDE MORE PATIENT-CONSUMER VALUE?

- **Shift focus from the disease to the person**
“What is the matter” versus “What Matters to You”
- **Understand consumer preferences and values that inform your customer experience strategy**
Research, feedback, tracking, information sharing
- **Segment your Market – Different Segments have different Needs**
Identify desires and commonalities of sub-sectors to tailor products and services in a way that reflects these insights.



HOW CAN WE PROVIDE MORE PATIENT-CONSUMER VALUE?

- **Move from “one size fits all” to “one size fits one”**
 - *Adapt strategies to better meet individual/segment goals and personal circumstances*
- **Broaden your focus on healthcare professionals – go beyond physicians**
 - *New pharmacist scope of practice*
- **Explore digital technologies** that better connect people to your brands and allow them to be active partners in managing their care.



GREAT EXPECTATIONS. WHY PHARMA COMPANIES CAN'T IGNORE PATIENT SERVICES

Accenture Life Sciences. 2014.

- 76% of patients think pharma companies have a responsibility to provide information and services that help patients manage their own health
- 74% think that the best time to initiate outreach is when they start taking the medication
- There is a significant gap between the services patients want and what they are receiving
- Patients are willing to provide information on their health to get the services they want

Over the past year, have you conducted patient-consumer research on your product or service?

- A. Yes
- B. No
- C. Not sure



WHAT CAN WE LEARN FROM THE CONSUMER PACKAGED GOODS WORLD?

**In this industry Consumer Focus is strongly linked to
Profitability**

Winning the Battle for Consumer Healthcare
Science versus Marketers
AT Kearny 2012



LESSONS FOR THE PHARMACEUTICAL INDUSTRY

- The Role of Strong Brands and Category Domination
- The Vision of Future Market Trends
- Consumer Understanding
- Excellence in marketing strategy and execution
- The (Integrated) Marketing and Sales Plan
- Access to and Relationship with Mass Retail
- Numerous stakeholder relations



CONSUMER FOCUS?

- Birth Control: Yaz, Diane 35
- Cosmetic Drugs: Botox, Juvederm
- Erectile Dysfunction: Viagra
- Smoking Cessation: Zyban, Chantix

**What patient-focused innovation
will be in your marketing plan this year?**

- A. Product
- B. Communication
- C. Target or Channel
- D. All of the above
- E. No innovation planned



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The Patient Voice

Dawn Richards, PhD

Consultant

Vice President, Canadian Arthritis Patient Alliance
Person Who Lives with Rheumatoid Arthritis



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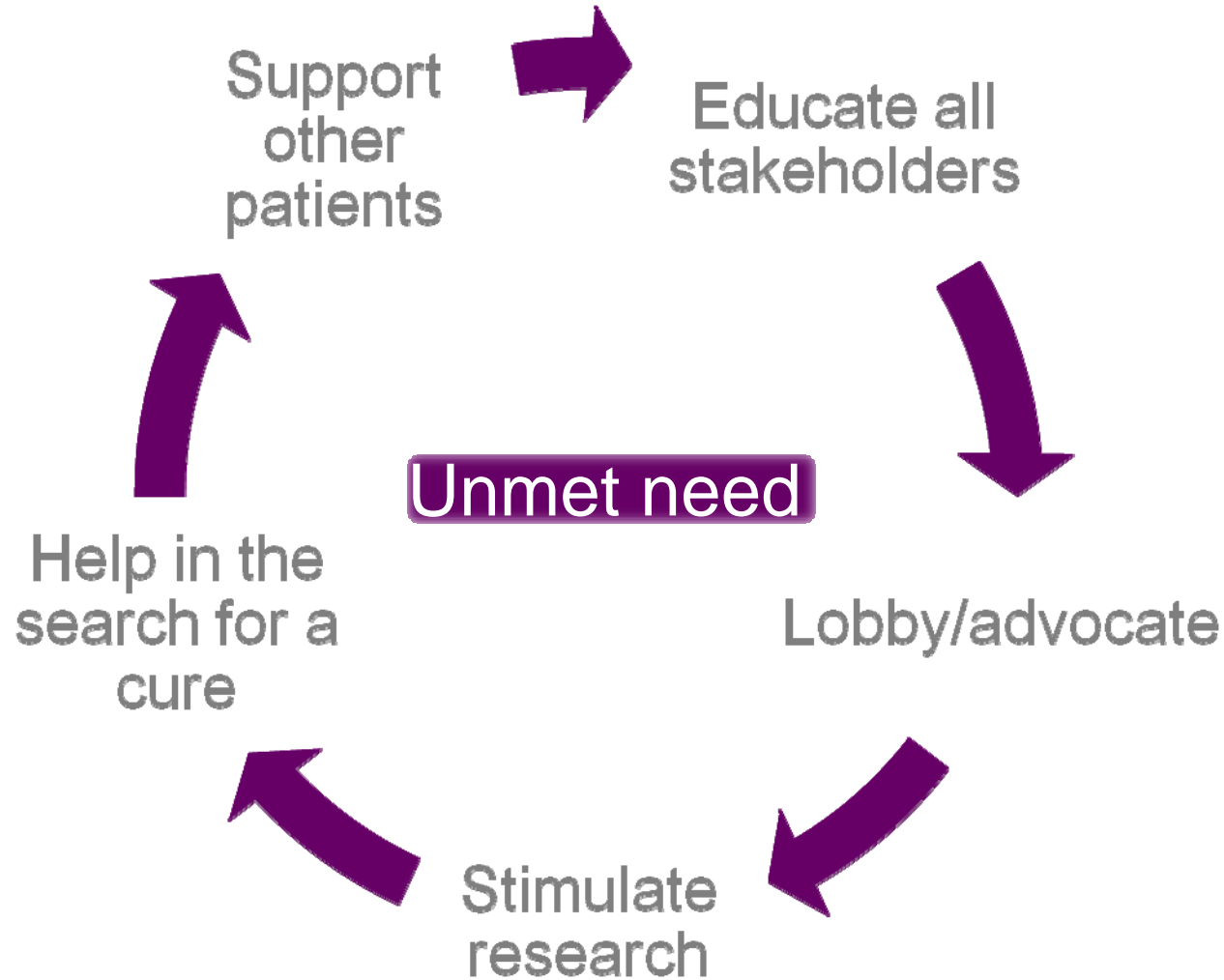
Overview

- Patient associations
- The current state: pharma and patient associations
- Barriers and facilitators – internal and external

The Patient

- How many of you would think I have a chronic illness if I did not confess to it?
- My request: throw out your preconceived notions of patients now!

Patient Associations



Editorial, Journal of Investigative Dermatology (2010), Volume 130, p 758

Example: Patient Association



President: Linda Wilhelm
Vice-President: Dawn Richards

- **Goals:** educate, raise awareness, collaborate, advocate
- **Challenges:** varying levels of wellness/capacity, no FT employees, >100 types of arthritis, funding, no global arthritis organization
- **Activities in 2014:** basic operations, patient HTA input, Arthritis Patient Charter, SEB position paper, newsletter, re-engaging stakeholders

Examples: Other Organizations

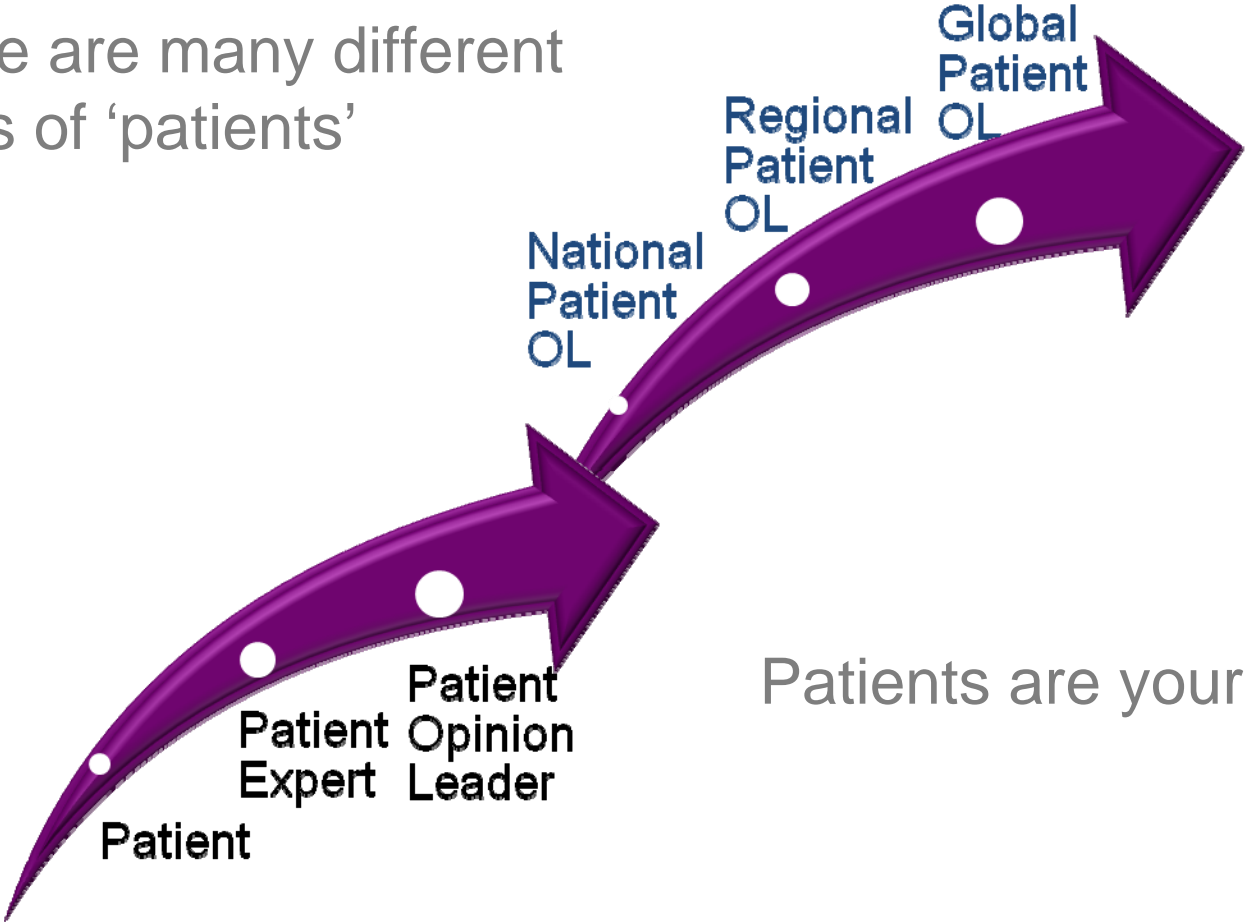
- All reference the patient voice in different ways
- Examples
 - Canadian Association for People-Centered Health (CAPCH)
 - Patient Commando
 - Patients Canada
 - Charities

**Are you aware of patient associations
representing indications of interest to your
company?**

- A. Yes
- B. No
- C. Not sure

The patient and physician worlds are parallel

There are many different types of 'patients'

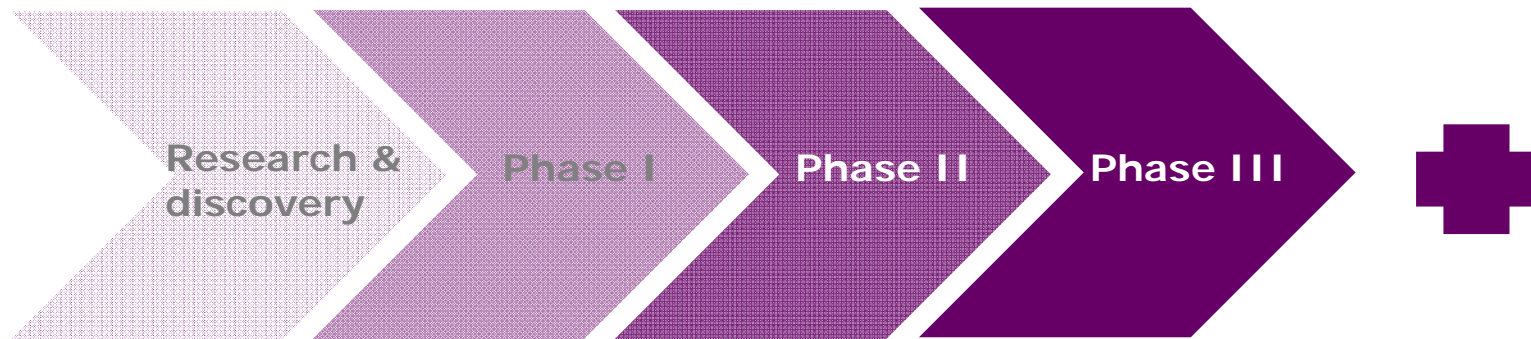


Patients are your customers

Motivations

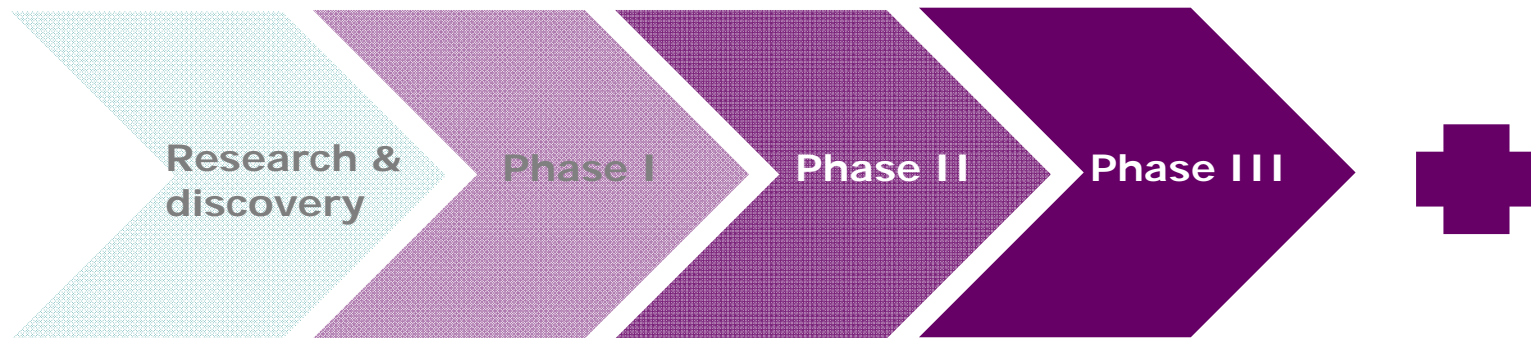
- Give diagnosis meaning
- Provide expertise of living with a chronic disease daily
- Help others with disease
- Speak for those who can't/don't have the time or energy
- Collaborate meaningfully
- Obtain access to resources and reach that are not otherwise possible

How are patient associations currently working with pharma?



- Traditionally interactions occur at later stages
- Rare diseases often interact at earlier stages
- European Patients' Academy on Therapeutic Innovations (EUPATI) initiative in Europe aims to change this

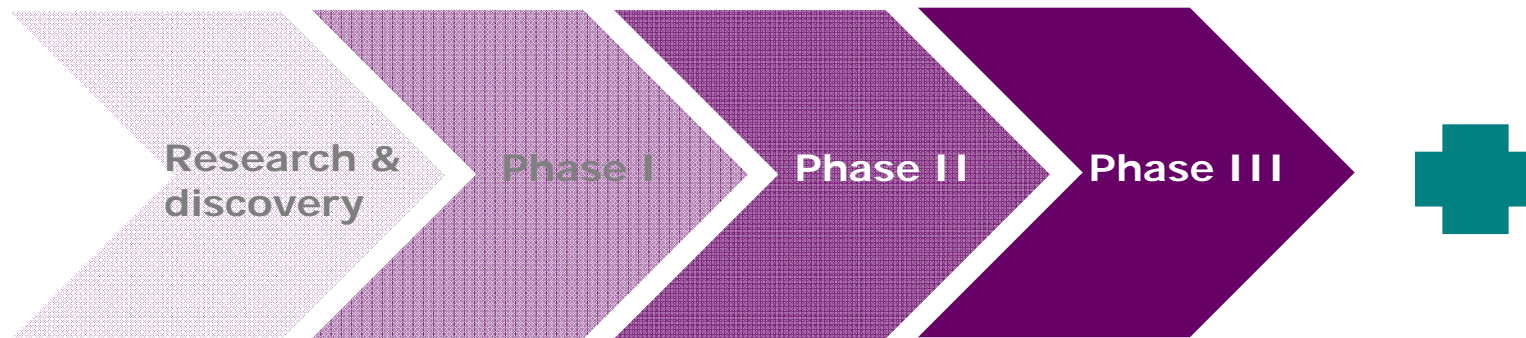
Example: GSK



- Patients provide disease insights to R&D teams
- Inform and shape clinical research activities
- Team feels that it is important to engage patients early

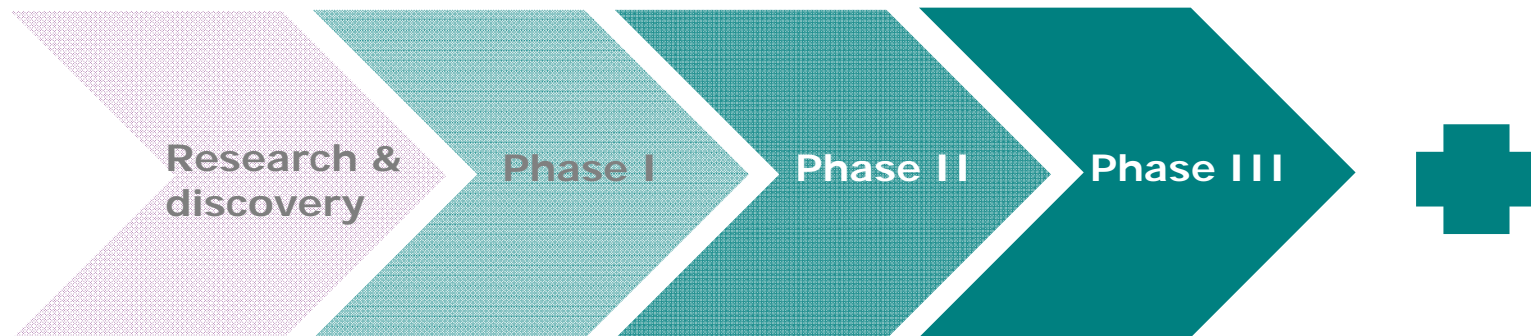
*“An industry perspective on collaboration and patient engagement” Kay Warner presentation at DIA Europe, 2014, and 2014 07 23 EUPATI PO I Meeting Case Reports
(<http://www.patientsacademy.eu/index.php/en/joomdoc/eupati-reports>)*

Example: AbbVie



- RA: Join the Fight (www.rajointhefight.com)
- Global Advisory Board that includes patients, physicians, researchers, and other healthcare providers
- Focused around education, building tools, understanding unmet needs of patients through many perspectives

Example: Genzyme/Sanofi



- Ultra-rare disease, Pompe disease
- Worked with patient associations to help find patients, explain protocol and importance of trials
- Patient presented to EMA
- Patient organization developed patient outcome survey – has been important in reimbursement strategy

2014 07 23 EUPATI PO I Meeting Case Reports (<http://www.patientsacademy.eu/index.php/en/joomdoc/eupati-reports>)

Are you aware of these global examples of working with patient associations?

- A. Yes
- B. No
- C. Not sure

How are patient associations currently working with pharma?

Ad hoc

Relationship building

Part of supporting patients

Not strategic

Not well established

Advice

Recruitment for trials

Access to other patients

To Consider: Barriers & Facilitators

- It's all a point of view: perceived vs. real
- Organizational differences
- Internal vs. external

- Is it all really worth it??

Barriers/Facilitators

- Goal for pharma and patient organizations:
 - Helping patients with a specific disease
- Organizational differences
 - Volunteer vs. business
 - Compliance/legal stipulations
 - Capabilities
 - Language spoken
- Specific to patient groups
 - Fear of losing independence
 - Trust

Are you aware of the RX&D regulations with respect to working with patients/patient associations?

- A. Yes
- B. No
- C. Not sure

Barriers/Facilitators: Regulatory Agencies

- Health Canada
 - Food and Drug Act does not speak to this relationship
- Rx&D
 - Clearly outlined, straightforward regulations
 - Transparency
- PAAB
 - Not against the 2 groups working together

Key Considerations

Choose the type of patient involvement



Choose the stage of patient involvement



Initiate contact and partnership



Conduct research



Disseminate and provide feedback

- Build your relationships
- Create a well-defined vision, strategy and tactical plan, clearly articulate and agree upon roles
- Collaboration agreement (duration, objective, tasks) based on ethical principles (transparency, accountability, acknowledgement, sustainability, reliability)

**Do you think that finding ways to
work with patient associations is worthwhile?**

- A. Yes
- B. No
- C. Not sure

The 'system' is recognizing the value of patient input

Health Canada,
CADTH, EMA,
FDA

Provincial
Initiatives
(BC, ON, PQ, AB)

Pharma

Medical
Associations

CIHR SPOR,
PCORI

European
Patients' Academy
on Therapeutic
Innovation



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General Discussion and Questions



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YES!



- Empowered Patient = Self Managing Patient = Better Health Outcomes
 - Improved adherence to treatment regimes
- Learn from the CPG world – deep patient-consumer understanding is key to profitability
 - Research, Segmentation, Customer Experience, Innovative Marketing and Sales Plans
- Partner with the stakeholders that deliver your products and touch consumers/patients
 - Move beyond physicians. Changes in pharmacy scope of practice is likely to continue to evolve and will change the way ALL medications are prescribed and dispensed in Canada.



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YES!



- Patient Associations
 - Obtain access to other patients through engagement of groups/key patients
- Engage patients to understand their daily lives, how your therapies have transformed those lives
- Enable patient participation in development of the R&D agenda and priority setting
- Build clinical trials protocols that make sense to patients and fit in to their lives
- Build better educational programs, patient support programs with patient input
- For patients with chronic illnesses, help them see how they can be in control
- Learn that the number one goal of most patients is to: Live a Normal Life.



Have you thought of an example of how you can go back to work and either work with patient associations on a project or work to incorporate the patient voice in what you do?

- A. Yes
- B. No
- C. Not sure



NO ONE FORMULA!



Thank you!

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Anne Marie Wright

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REFERENCE PAPERS FOR MORE LEARNING

- **Ivey White Paper: “Its All About Me”**
<http://sites.ivey.ca/healthinnovation/files/2014/02/Its-All-About-Me-The-Personalization-of-Health-Systems.pdf>
- <http://www.accenture.com/SiteCollectionDocuments/PDF/Accenture-Great-Expectations-Why-Pharma-Companies-Cant-Ignore-Patient-Services-Survey>
- **EUPATI case reports**
<http://www.patientsacademy.eu/index.php/en/joomdoc-2/public-files/eupati-reports/318-2014-07-23-eupati-po-i-meeting-case-reports>
- ***Patient Partner, PATIENT INVOLVEMENT IN CLINICAL RESEARCH: A guide for Sponsors and Investigators***
<http://www.patientpartner-europe.eu/en/project-outcomes/sponsors-guide>
- **Rx&D guidelines**
[http://www.canadapharma.org/CMFiles/Commitment to Ethics/WithStakeholders/Transparency%20Guidelines/Guidelines for Transparency in Stakeholder Funding.pdf](http://www.canadapharma.org/CMFiles/Commitment%20to%20Ethics/WithStakeholders/Transparency%20Guidelines/Guidelines%20for%20Transparency%20in%20Stakeholder%20Funding.pdf)