

Focusing the client on key stakeholders to help them differentiate in a commoditized market

KANTAR HEALTH

The catalyst for successful decision-making in the life sciences industry

Challenge

A leading European pharmaceutical company was facing growing commoditization and price erosion within its international hypertension (HTN) portfolio. To remedy this, they felt they needed to change brand direction quickly. They engaged us to help them determine the market opportunity and challenge the brand team's proposed approach to the new positioning where necessary.

Process

Our approach was adapted to make the most of the client's extremely tight timelines. We started by looking at the current dynamics of the international HTN marketplace in order to fully understand how their drug was being used. A Patient Record Study (PRS) was undertaken, looking at the size of HTN subpopulations, the profile of typical patients and residual unmet needs, e.g., the percentage with uncontrolled blood pressure by using the largest health outcomes database, the National Health and Wellness Survey (NHWS). Treatment objectives and current HTN treatment algorithms were examined and fed into initial forecasts. We also facilitated workshops and discussion groups to help the client clearly understand exactly how and where its product was most likely to be used, including specific patient groups, mono-combination and line of therapy. We then talked to specialists, GPs and other stakeholders including patients in the subgroups to measure and evaluate the perceptions of the drug. The findings of these workshops and discussions allowed us to revise initial forecasts. At the same time we focused on getting the team the optimal strategy and supporting positioning/messaging to improve ROI.



Outcome

We recommended refocusing on messaging that resonated with specialists and stressing additional product benefits, e.g., cost effectiveness. This was because we found that specialists were not only the leaders in initiating therapy in patients with comorbid conditions but also the potential ambassadors for the clinical benefits.

In addition, we challenged the client to take into account the regional variations we had found in treatment, e.g., more aggressive treatment approaches that had previously not been considered, and stressed the importance of keeping high visibility of ongoing clinical trial programs.

Catalytic moment

The client commented, "Insights from Kantar Health's qualitative and quantitative (mini-conjoint studies) made us rethink our approach. Even though they were on an incredibly tight timescale, they delivered robust and well-supported data, challenged our misconceptions and ultimately gave us the back-up we needed to revise our positioning and show acceptance of that messaging by key stakeholders to the brand teams."