

Leveraging Patient Support Programs in Biologic-Biosimilar Competitive Landscape

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SKIM: Decision Behavior Specialists

Biologics are facing biosimilar competition

On the Horizon

Lower-priced competition is coming to the U.S. for some expensive biotech drugs, as big companies develop their own 'biosimilar' versions.

DRUG	Humira	Enbrel	Remicade	Lantus	Neulasta	Neupogen
2014 U.S. SALES	\$7.22 billion	\$5.51	\$4.50	\$4.47	\$3.83	\$0.84
COMPANY	AbbVie	Amgen	J&J	Sanofi	Amgen	Amgen
TREATS	Rheumatoid arthritis	Rheumatoid arthritis	Rheumatoid arthritis	Diabetes	Infections during chemotherapy	Infections during chemotherapy
RIVALS DEVELOPING BIOSIMILARS	Amgen, Boehringer Ingelheim, Novartis, Pfizer, Samsung	Baxter, Novartis, Samsung	Hospira, Pfizer, Samsung	Eli Lilly, Merck & Co./ Samsung, Mylan	Apotex, Novartis, Hospira, Merck KGaA, Mylan, Teva	Apotex, Novartis*

Source: Bernstein Research

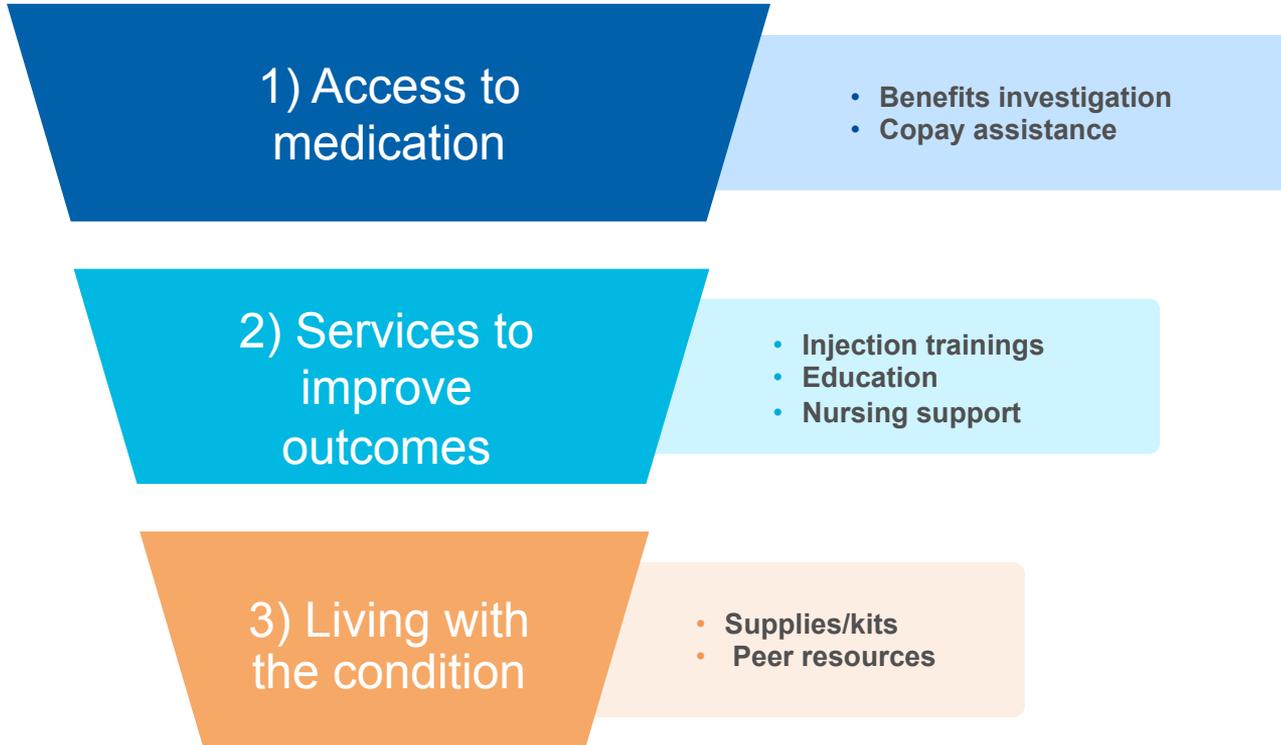
*Received FDA approval in March 2015

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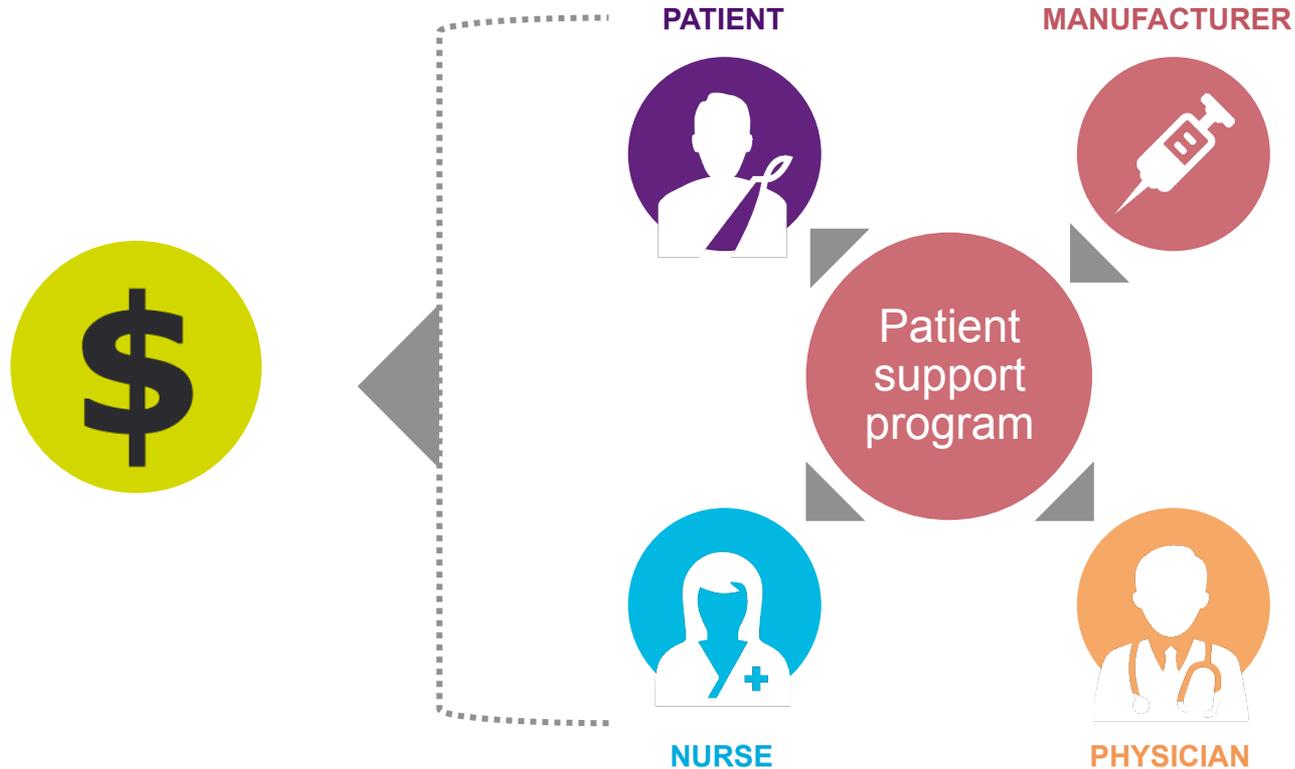
Strategic levers in biologic-biosimilar competition



Basic structure of such patient support programs



Stakeholders of a patient support program



5 key learnings to leverage patient support programs in biologic-biosimilar competitive landscape

1

Three types of services are most critical

2

Patient support programs are not just for patients

3

Different needs for different stages in the patient journey

4

Goals and expectations are different

5

Two broad opportunities to (re)create value

Learning 1: Access, device training and disease, and therapy education are the most critical services

expected for biosimilars

expected for both

- Co-pay assistance
- Injection training
- Educational programs

expected for neither

expected for biologics

Learning 2: Patient support programs are also about helping HCPs better serve patients

RX INITIATION PROCESS FOR HCPS



Nurses spend the most time on the phone and filling out paper work.

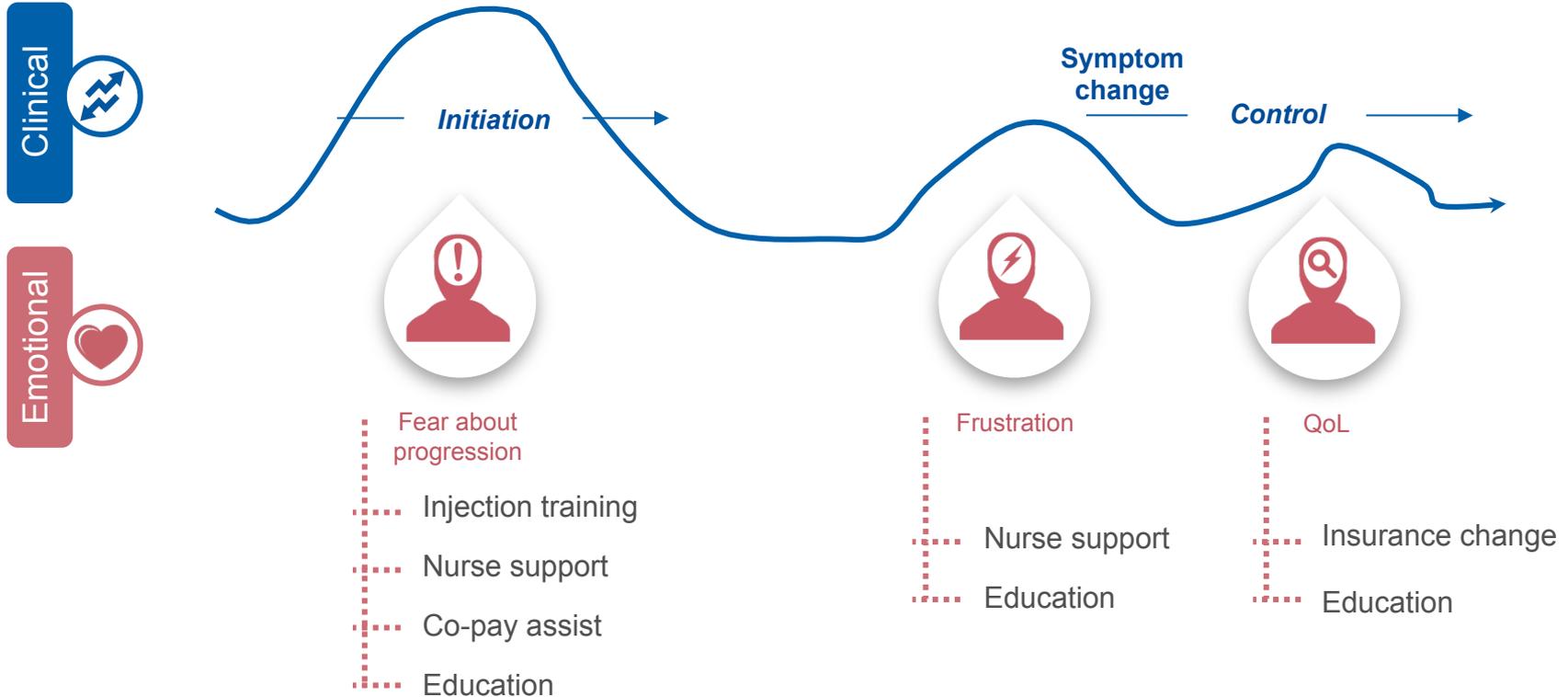


Nurses are freed from providing training themselves.



Physicians may need to hire staff to handle authorizations.

Learning 3: Recognizing patients' needs at various stages of their journey is important



Learning 4: Goals differ between originator and biosimilar patient support programs



Biologics

Differentiate:

- **Meaningful services:** HCP centered services or services that help to obtain access and ensure compliance.
- **Cohesive** patient experience



Biosimilars

Prioritize:

- **Evaluate** existing programs
- **Identify what matters most:** Certain services are expected - cost of coming on the market.

Learning 5: Two broad opportunities to (re)create value for all stakeholders



Re-package service offerings

- ❖ There is **low awareness** of the full breadth of services
- ❖ Reflect how patients and HCPs **categorize services differently**
- ❖ **Clear, descriptive** language optimizes utilization



Offer services that make HCPs' lives easier

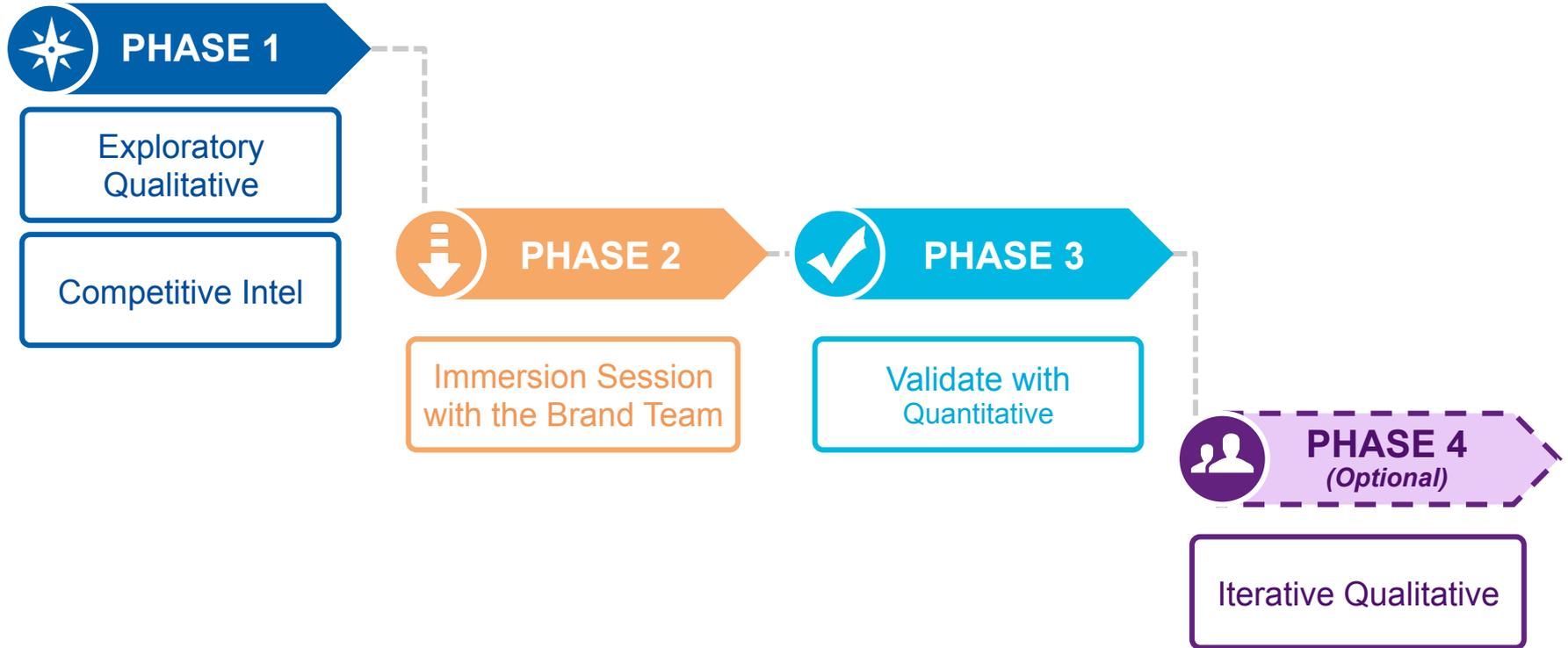
- ❖ There is **more room to create value** for HCPs
- ❖ Ensuring that patients get on treatment and stay compliant **eases the burden on practices**
- ❖ **Easy to access**

Framework and considerations

Include all of the relevant stakeholders

STAKEHOLDER	KEY QUESTION	RELEVANT EXPERIENCE
PHYSICIAN 	What is the actual impact on prescribing ?	<ul style="list-style-type: none">• Ultimately responsible for prescribing• May take different programs into account
NURSE 	How do different programs compare in alleviating the burden of getting patients started?	<ul style="list-style-type: none">• Most interaction with support programs• Deeper understanding of different programs
PATIENT 	What feelings does patient support invoke? How do those feelings impact brand loyalty ?	<ul style="list-style-type: none">• Rely on programs for starting and staying with Rx• Programs provide assistance and comfort

Employ a multi-phased qualitative and quantitative methodology





Phase 1A: Exploratory qualitative research



Individual Interviews

Establishing a range of experiences

Broad exploration of individual experiences

MOST APPROPRIATE STAKEHOLDERS

PATIENT



NURSE



PHYSICIAN



Online Bulletin Board

Projective exercises for unstated feelings and unmet needs

In-depth reflection and descriptive accounts

MOST APPROPRIATE STAKEHOLDERS

PATIENT



Focus Groups

Ideation and co-creation

Assess extent of unmet needs

MOST APPROPRIATE STAKEHOLDERS

PATIENT



NURSE





Phase 1B: Competitive intelligence (conducted alongside exploratory qual)

HCPs



- HCPs typically work with **multiple brands**
- Therefore, competitive intel is relatively **easy to obtain**

PATIENTS



- Current patients with **past experiences** on other brands
- **Former patients** who have switched
- **Competitor patients** who have never been treated with the Rx in question



Phase 2: Immersion session with Brand team

- Discuss the **qualitative outcomes** deemed relevant
- Identify relevant **service offering packages**
- Align the outcomes of the quantification phase with **brand team needs and expectations**





Phase 3: Validation through quantitative research

Metrics to assess current services

'Drag-and-drop' classification

Measure impact on loyalty



Awareness



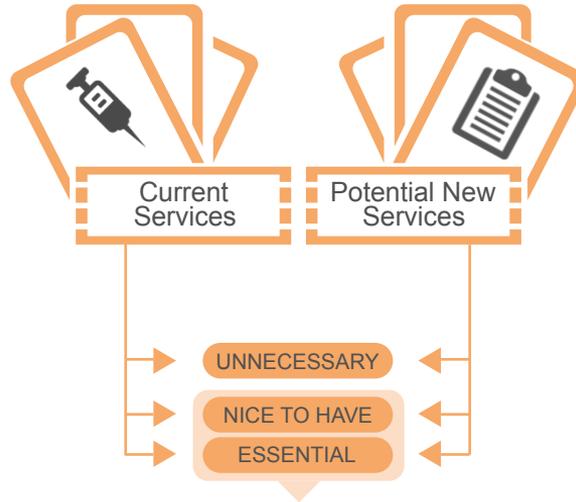
Importance



Utilization



Satisfaction



Baseline of engagement/ loyalty



Compare optimization strategies against baseline

Contact



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