

Patient Centricity: Reality or Rhetoric?

Everybody is talking about patient centricity, but what does it mean for those involved in market research and business intelligence? Since being patient-centric relies on a deep understanding of patients needs, and we are in the business of generating customer insights, we should be well placed to support this initiative. We spoke to a number of our clients in order to get the low-down on the current situation. They confirmed that their organisations are making changes to their business, to a lesser or greater degree, at both corporate and functional levels, but many felt that, whilst their company was moving in the right direction, they aren't there yet. Conversations with our clients highlighted three key challenges to generating better patient understanding as a means to implementing a patient-centric approach. I would like to share these challenges and look at ways in which market research agencies may be able to help overcome them.

Firstly, there is the issue of limited resources. With a squeeze on budgets, pharma companies can feel they still need to prioritise research with HCPs as the key stakeholder and ultimate decision-maker. There is also sometimes a belief (usually from outside the market research department) that the patient voice can be represented or gained from research where the healthcare professional provides the patient perspective.

However, most clients and agencies know that physician research alone will not deliver the voice of the patient. There are many examples illustrating the disconnect between what the physician believes and how the patient feels and the impact on patient care. In markets where healthcare costs are out-of-pocket, the patient makes the decision to undergo treatment, and in some emerging markets where there is no primary care system, the patient is the only constant in the patient journey.

To demonstrate the real value of the patient voice we need to remove these and other 'filters' – the different lenses through which patients are typically engaged in market research. There are many new methodologies which are great at getting closer to the true voice of the patient, yet cost-effective, such as mobile surveys, patient journey studies involving multiple stakeholders, observational in-home interviews, moderated online communities and social media monitoring, amongst others. Of course, choice of methodology should be made according to the research objectives and the business questions which need to be answered.

The second challenge is being compliant with the legislative rules and procedures governing engagement of patients in market research through data protection and privacy laws, including the impending Generation Data Protection Regulation coming into force at the end of May.

These rules and restrictions can make patient research feel like too much of a headache. But they don't need to. As long as compliance procedures are rigorous and continuously updated to meet current requirements, then patient research is definitely workable.

The third challenge is quantifying the benefits of a patient-centric approach, which of course, is challenging. How can pharma measure whether putting the patient first really benefits the business? It requires a change in mind set long ingrained within the industry. In many markets, promotion to patients is not allowed, so engaging with patients seems counter-intuitive. As a consequence, it can be difficult to convince management that listening to the patient voice benefits a brand.

We believe that one way to demonstrate the value of patient centricity is to share the insights. Data visualised outputs such as animations, videos and infographics of the key insights are a great way of telling the story, as they can turn dry complex information into something engaging which can easily be shared with key stakeholders across the organisation. Many of our clients have found that these sorts of outputs have really helped convince other teams within sales and marketing of the value of patient insights.

The pharmaceutical industry is undoubtedly moving from a product-centric marketing model to a patient-centric one. Advances have been made in achieving this, but there is still more to do. Patient research to improve understanding will support the shift, ideally as part of a holistic understanding of the whole healthcare journey from pre-diagnosis to stabilisation, incorporating the views and needs of all key stakeholders including the healthcare professionals involved in delivering patient care. Fortunately we are entering an era where getting closer to the patient is being made easier with the use of digital and mobile methodologies which allow us to re-create or utilise data from the real-world experience. This is our opportunity to provide the insights pharma needs in order to deliver on the promise of true patient centricity.

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