

Case Study: Value Strategy for New Regimens for HBV and HDV

Client type: Global Pharmaceutical Company

Market Scope: US and EU5 (Germany, Italy, UK, France, Spain)

Therapy Area: Infectious Disease



SITUATION

Our client, a global pharmaceutical company, wanted to determine the value strategy for new products in development for the treatment of co-infected Hepatitis B and D patients

Primary research objectives included:

- Assess attractiveness/value of select assets in terms of: TPP, clinical evidence, meeting unmet needs and commercial appeal
- Determine likely pricing scenarios in comparison to current and future standards of care
- Understand the value of treating HBV+HDV coinfection

APPROACH

- Primary research included deep dive qualitative interviews with 2 KOLs across each country to understand treatment trends, novel therapies and access requirements
- Primary research also included qualitative interviews with 1-5 payers across each country to determine market dynamics, perceptions on unmet needs, pipeline agents, market access and pricing expectations

OUTCOME

- The research allowed Ipsos to uncover the level of unmet need and clinical burden within each indication, how well the products would be received, the familiarity of disease severity, and product preference vs. standard of care across countries
- Our team provided price tolerance ranges for each country in scope as well as price tolerances, which supported pricing and recommendations made for each indication (mono vs. dual indication)
- Client utilized our work to inform pricing and market entry strategies across countries

HBV/HDV= Hepatitis B/
Hepatitis D
TPP= Target Product Profile
KOL= Key Opinion Leaders