Passnotes

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NO WAY BACK

Where next for pharma, biotech and life sciences communications strategies?

As COVID-19 continues to exert pressure on healthcare systems, industry partners are stepping up to their vital role in helping teams manage increased caseloads and clear backlogs, while continuing to deliver high-quality patient care. But how can communications professionals navigate this evolving landscape?

Despite the success of the vaccination programme in the UK, the arrival of the Omicron variant showed that COVID-19 may be around in some form for a while. And while the link between infection, serious illness and mortality has been weakened through vaccination, the arrival of a more serious variant would test the hypothesis that the link has been entirely broken.

Even while the effects of Omicron seem less severe than previous variants, continued hospitalisations are placing pressure on the NHS, just as healthcare professionals are attempting to tackle the huge backlog of procedures and interventions that built up during the early part of the pandemic.

It puts the onus on those in the pharmaceutical, biotech, MedTech, healthcare equipment, and life sciences sectors to support their healthcare professional colleagues.

Read on to learn more about the trends that are transforming pharma, biotech and the life sciences, and what this revolution means for communications professionals.

Running progress

Industry has achieved breathtaking success over the last two years, most notably by developing, testing, and distributing COVID-19 vaccines within a year of the pandemic declaration.

Driven by necessity, the sector has overcome commercial rivalries, developed partnerships, accelerated development programmes, and navigated the regulatory climate more efficiently to bring products and therapies to market faster than ever before.

If the impending healthcare crisis is to be addressed, maintaining this momentum of innovation is essential. Working within this new paradigm will present industry communication professionals with new challenges.

But success will not only help the NHS to build back better – it will also present organisations with new commercial opportunities.

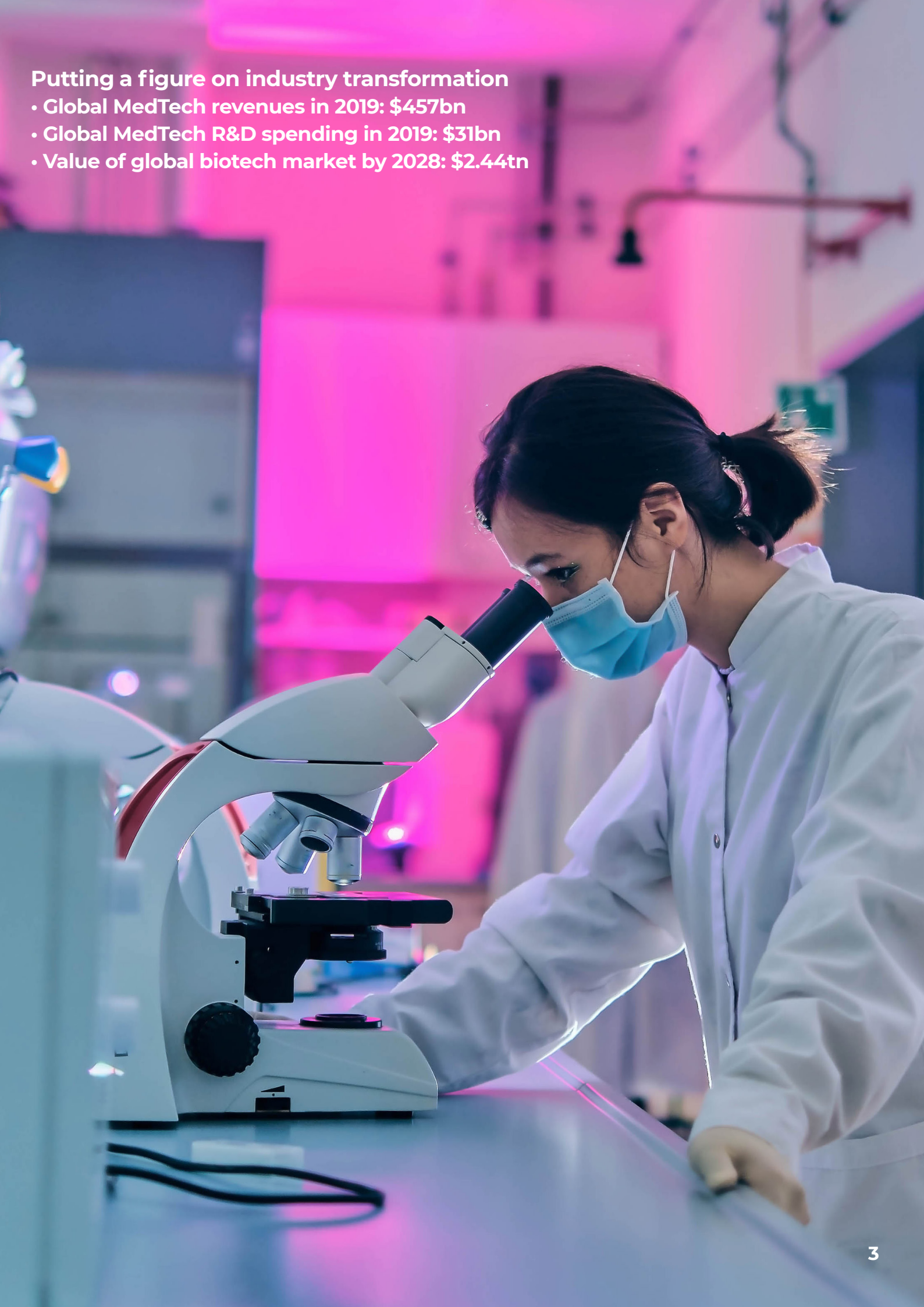
A shifting landscape

In amongst the challenges posed by the pandemic, huge advances have been made in terms of joint working and collaboration across the healthcare ecosystem. Necessity, the well-known mother of invention, has driven progress and change at a phenomenal rate.

Five distinct trends are driving this change, and there is little sign of this transformation slowing down:

1. The power of partnerships
2. New ways with old challenges
3. The potential of vaccines
4. Speeding up development
5. A supply chain squeeze

Read on to find out more about these trends matter, and learn how communications professionals can manage them.



Putting a figure on industry transformation

- Global MedTech revenues in 2019: $457bn
- Global MedTech R&D spending in 2019: $31bn
- Value of global biotech market by 2028: $2.44tn

Theme 1

The power of partnerships

Partnership has been the watchword of the pandemic, and this has accelerated the use of collaboration and the adoption of innovation.

The obvious examples include joint vaccine development projects, for example Pfizer partnering with BioNTech, and Oxford academics with Astra Zeneca. Big players agreed early on to standardise delivery device components to streamline manufacturing, while manufacturing facilities the world over pooled their resources and know-how in a bid to vaccinate the world.

There has also been greater joint working across the private / public divide. At the start of the pandemic in London, for example, all private providers were placed on a block contract with NHS England, allowing surrounding hospitals to use their resources as needed.

While such models are nothing new, they did take on a fresh impetus during COVID. As the health sector, in its entirety, united behind a common goal, we saw the rapid development and distribution of new therapies and vaccines, and the freeing up of invaluable resources for the treatment of disease.

Applying a similar ethos to other items on the healthcare 'to do' list – whether that's eradicating health inequalities, tackling antimicrobial resistance, or developing treatments for deadly diseases – could pay dividends for all involved.

Theme 2

New ways with old challenges

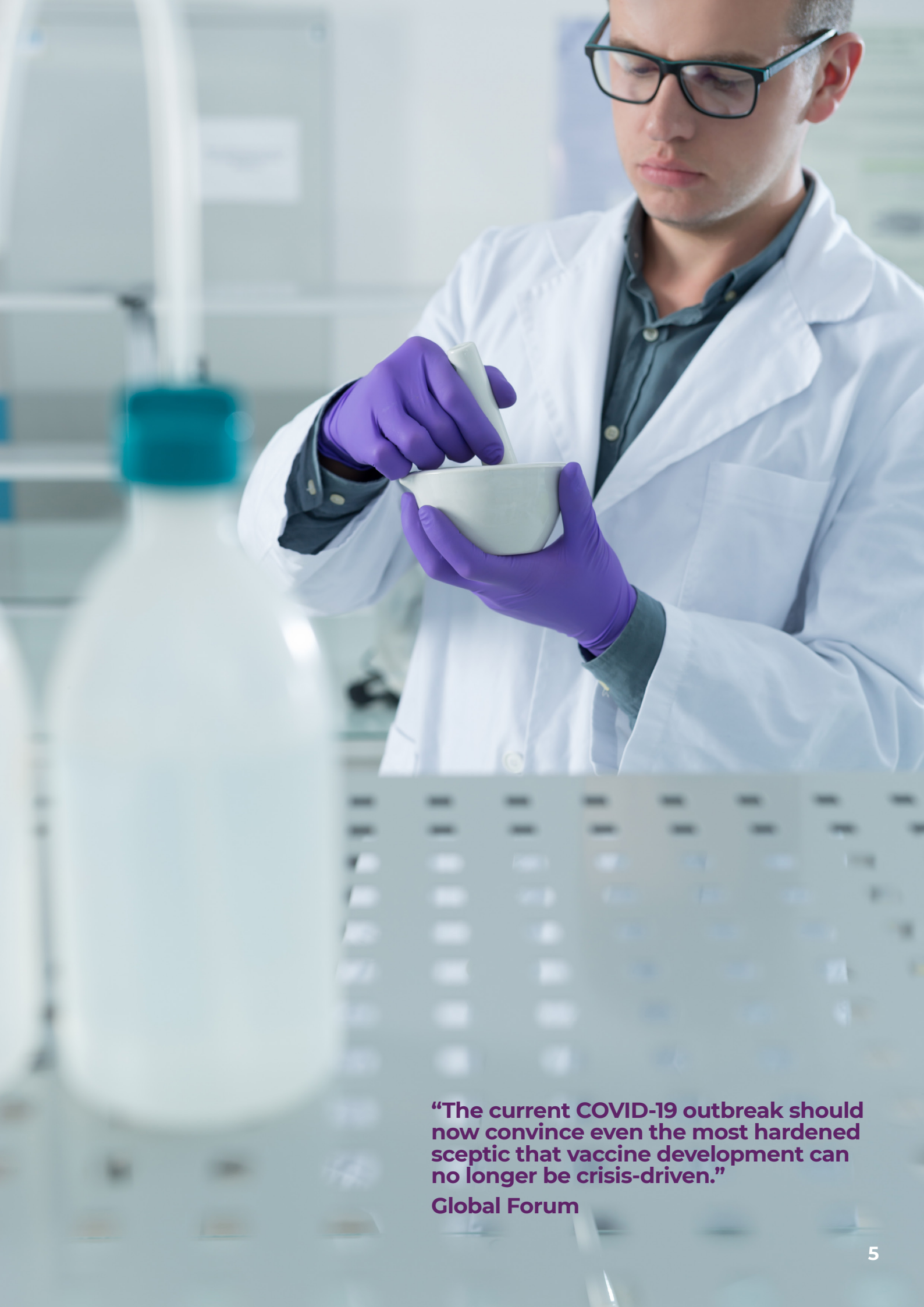
There is no 'one size fits all' solution to the challenges of COVID-era healthcare - making agility essential.

The size and severity of backlogs and waiting lists, for example, will vary from therapy area to therapy area, and from trust to trust. Anyone who has ever worked with the NHS will understand the challenges of developing and implementing patient pathways that work across sites. Success relies on local customisation.

Industry representatives are experts in their fields. They have a huge amount to offer in terms of working with local teams to achieve their local aims. Whether the service needs help designing appropriate pathways, putting together business cases, or creating educational materials, the end result is a win/win: the optimal environment for an organisation's intervention to improve patient outcomes.

At the same time, the foundations of the industry itself have shifted. Huge leaps forward in medical understanding mean biopharmaceuticals, including monoclonal antibodies, mRNA vaccines, cancer treatments and gene editing are finding new ways to tackle old challenges. We are also seeing exponential growth in the use of MedTech interventions, both in routine practice and within clinical trials – a trend that has been accelerated by the pandemic.

It is a shift that presents legacy players with the challenge of more competition, but the opportunity to achieve even more by working together.



“The current COVID-19 outbreak should now convince even the most hardened sceptic that vaccine development can no longer be crisis-driven.”

Global Forum

Theme 3

The potential of vaccines

One word that has been on everyone's lips since March 2020 is "vaccine". There's no denying that the biopharmaceutical industry has exceeded all expectations by developing a range of COVID-19 vaccines so quickly.

The mRNA vaccines, based on the same technology of cancer immunotherapies, potentially offer a 'plug a play' system for inoculation. The industry has also demonstrated how innovative clinical trial approaches can slash the time it takes to test vaccinations, without compromising on safety.

So, what does this mean for the future of vaccine development? According to the Global Forum, vaccine development, particularly in emerging infectious diseases, has historically offered "few economic incentives". Traditional market forces are not adequate to support the multimillion-pound development programmes necessary, and progress has largely been driven by philanthropy.

But COVID-19 has brought the issue of pandemic preparedness into sharp focus, and could lead to government-led incentives, such as a global 'megafund' strategy or state-backed investment.

It's not all about dealing with new diseases. Investing in vaccine development can help solve some of the most pressing, existing crisis, such as malaria.

In 2019, around 409,000 people – mostly young children – died from the disease in sub-Saharan Africa.

One vaccine candidate is currently in phase 2 clinical trials meaning the end of this devastating disease could well be in sight.

Theme 4

Speeding up development

Drug development has been getting more expensive and taking longer for decades. As medications become more advanced, and patient populations more targeted, studies have become more complex. It now takes an average of $2.9 billion to develop, test, and bring a new product to market, while only 13.8% of products entering industry-sponsored Phase I trials go on to obtain FDA approval.

In recent years, a number of solutions have emerged. Decentralised clinical trials, remote monitoring, centralised monitoring, and risk-based quality management (RBQM) all aim to streamline the process, while tackling the issues that lead to poor recruitment and retention, and low levels of participant diversity.

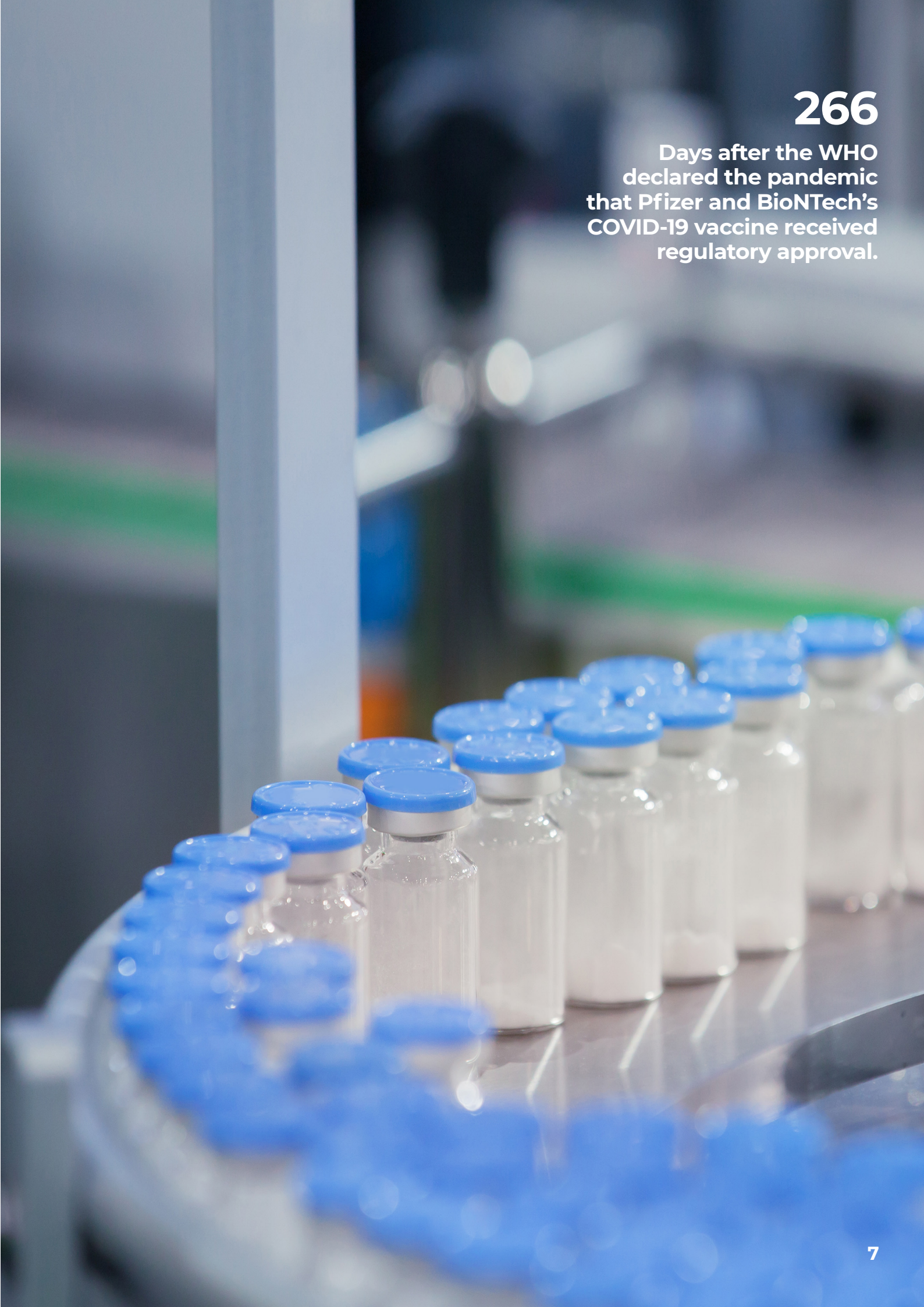
Uptake, however, has been slow. But COVID-19 has shifted the landscape, and proved to be digital trial evidence base gold mine.

When stay at home orders were issued, sponsors and CROs were faced with the choice of closing studies or moving to remote monitoring. Those that opted for the latter were able to demonstrate that offering participants more flexibility in how and where they were seen was not only feasible, but preferable.

Much has been made of the speed at which COVID vaccines were developed, with the process that can usually take up to a decade being condensed into little more than a year.

The industry leveraged a number of elements to achieve this, not least the fact that scientists have been working with coronaviruses of various types for years. But embracing clinical trial technology also played a leading role. Pfizer, for example, deployed RBQM, a system of continuous risk signal monitoring, that saw teams reviewing data on a daily – rather than the usual monthly or quarterly – basis. This, combined with accelerated participant enrolment, remote monitoring, and streamlined regulatory approval, led to lightening speed development, without compromising safety.

The success of this pivotal trial, and many others like it, has shown both the value and the safety of moving to RMQM and remote monitoring – a model that is expected to be reinforced by E6 (R3), the upcoming update to the International Council for Harmonisation's (ICH) guidelines.



266

Days after the WHO declared the pandemic that Pfizer and BioNTech's COVID-19 vaccine received regulatory approval.

Theme 5

A supply chain squeeze

The impact of COVID-19 on supply chains – from diagnostics to manufacturing, fill and finish to distribution – cannot be overestimated. Industry research has found that the pandemic caused significant challenges, with drug shortages and increased production costs chief among them.

Indeed, some 46% of pharmaceutical companies, wholesale distributors, hospitals and pharmacies experienced shortages of COVID-19 and unrelated therapeutics during the pandemic. Meanwhile 70% reported that their supply chain was vulnerable to ongoing problems caused by the pandemic.

As governments placed priority orders for vaccines and COVID-19 therapies, manufacturers were asked to expand capacity almost overnight, to meet both their new commitments and existing commitments. Global prescribing of previously plentiful drugs, such as dexamethasone, quickly wiped out stockpiles. And the international effort to innovate the world's population has led to a global shortage of components such as glass vials and stoppers.

While the industry is getting back on track, through greater collaboration and more agile working, this supply chain squeeze is set to continue for the foreseeable future.

NHS: A status update

The pandemic exacerbated many of the NHS' existing challenges. Pre-March 2020, it was attempting to care for an aging population, living with an increasing number of chronic conditions, against a backdrop of funding shortages and dwindling resources.

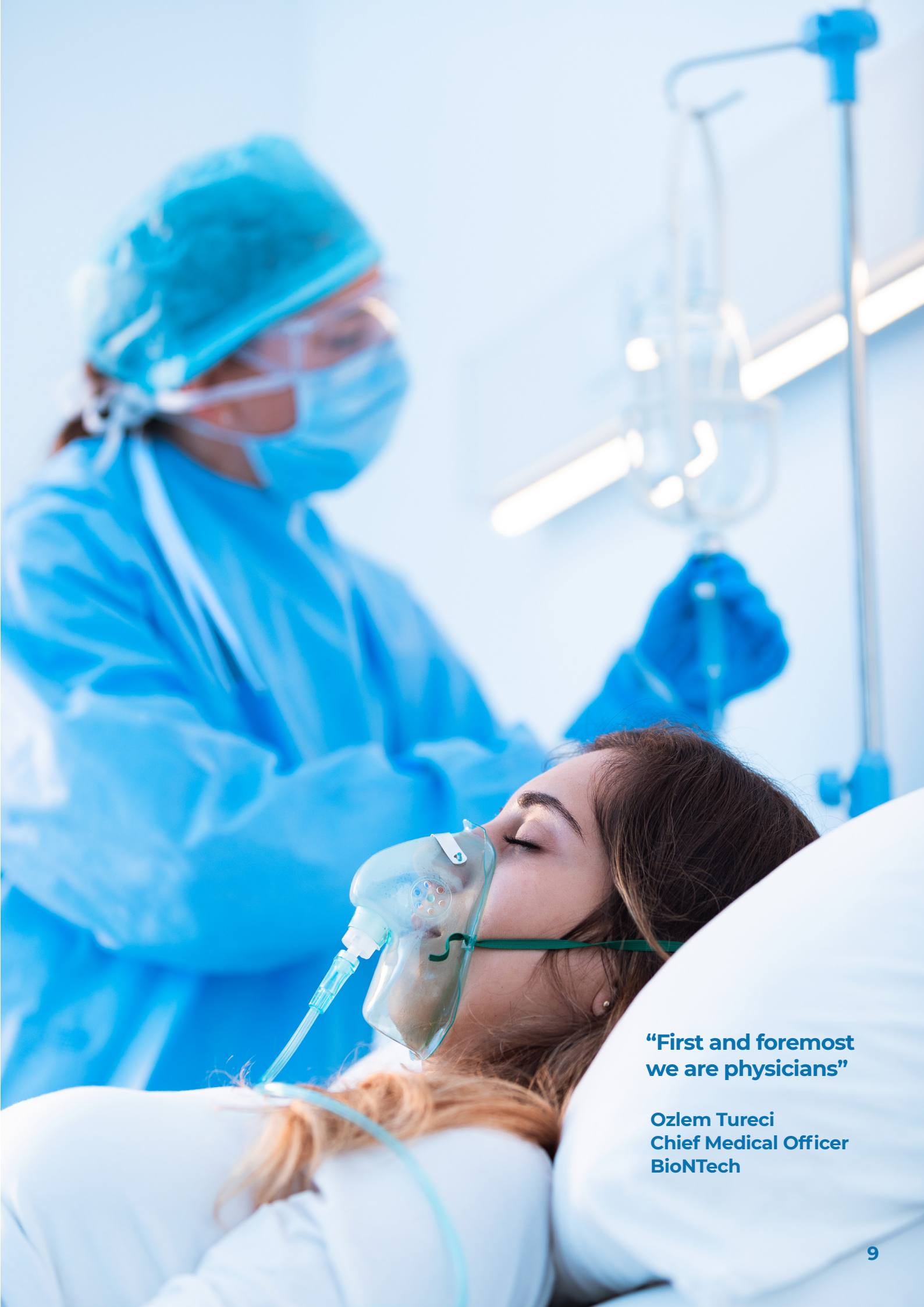
In short, demand was threatening to outstrip capacity long before SARS-CoV-2 threatened to overwhelm the system.

As of September 2021 NHS England reported a vacancy rate of 10.5% within the Registered Nursing staff group, equivalent to 39,813 job vacancies. These shortages were laid bare at the start of the crisis, when the service put out a call for volunteers and recently retired professionals to re-join the fold.

Waves of increases in COVID infections have only served to compound the staffing challenge: on 2 January 2022, 39,142 NHS staff at hospital trusts in England were absent for Covid-19 reasons, up 59% on the previous week (24,632) and more than three times the number at the start of December (12,508).

At the same time, waiting lists have soared, thanks to a combination of infection control measures, resources – including staff – being redeployed to the front line, and people being too scared to access services. Nearly 6 million people were on the waiting list for non-urgent operations in November 2021 – the highest number since records began in August 2007.

This is the background to which NHS staff – who, according to a House of Commons Health and Social Care Committee report, are facing "emergency levels" of burn out – are attempting to bring services back online and clear backlogs, care for COVID patients, and establish pathways and services for the tens of thousands of people living with the chronic impact of infection.



“First and foremost we are physicians”

Ozlem Tureci
Chief Medical Officer
BioNTech

Navigating a new world

Challenges for industry communications professionals

Partnerships

What does the alignment of different organisations with different purposes mean for communications professionals more used to owning and controlling their messages?

- Embrace joined-up working across communications teams.
- Ensure there is greater consistency in approach and messaging.

Innovation

The public at large has become more medically and scientifically literate as a result of Covid, but how do communications professionals take HCPs and patients with them as they introduce ground-breaking therapies and technologies?

- Focus on the benefits to clinicians and patients.
- Be open and transparent around development, aims, and objectives.

Vaccination

How do professionals manage communications around vaccines in the light of intense public scrutiny and national expectations around delivery?

- Be transparent: sharing data does not equate to public advertising under the ABPI code of practice.
- Get on the front foot: shout about success - don't just respond to crises.

Speed of development

Faster development speed will spur commercial activity, forcing firms to speed up product launch and the tactical marketing. How do they manage this?

- Understand the unmet needs of patient populations to guide marketing strategies that embrace digital channels.
- Work with the wider disease area community, patients, HCPS and advocates to understand barriers to market.

Logistics

How can professionals manage materials shortages that present unique communications challenges that harm reputations and hit share prices?

- Provide better communications support in the boardroom where these issues are addressed.
- Be clear and consistent in your messaging, and provide senior representatives for interviews as well as statements.

To find out how the Henley Group can help your organisation better navigate a changing healthcare landscape contact James Tate on james@henley.co.uk or +44 1491 570 971

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