Insight when it matters most

Understanding the Pharma market as the NHS seeks efficiencies in medicines and pharmacy

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> *'NHS Improvement will be supporting hospitals to save £250 million from medicines spend in 2017/18 by publishing and tracking the uptake of a list of the top ten medicines savings opportunities. As savings are realised the top ten will be refreshed with further products or switches that deliver best value.'*

NHS England 2017

NHS medicines and pharma purchasing – winners & losers

In 2017 the NHS announced its 10-point plan as part of its 'Five Year Forward' view. Points 3 and 4 of the plan; '3. Use the NHS' procurement clout' and '4. Get the best value out of medicines and pharmacy' will have a direct impact on the pharma industry in the UK. Medicine cost savings is also a high-profile area of the plan which is likely to see it in the political spotlight.

The Medicines Value Programme focuses on 4 main cost areas:

1. **Commercial arrangements:**
   The commercial arrangements that influence price, including the work of NHS England's Commercial Medicines Unit, and Commercial Team
2. **Medicines Optimisation:**
   Ensuring prescribers and patients are using medicines in way that creates the best possible outcomes
3. **Policy framework**
   About the access to and pricing of medicines within the NHS. Involves working with the DH and NICE
4. **Infrastructure:**
   The programme covers the entire NHS system of secondary and primary care and involves a wide range of organisations including NHS Improvement and Health Education England

So, what will it mean for Pharma companies, their current portfolio of drugs? The NHS will clearly be looking to be seen to be delivering major savings on their medicines and pharma bill through exercising their considerable buying clout. In reality, that is likely to create winners and losers as larger volumes of some drugs are purchased but potentially from a much smaller range of options.

Who will the winners and losers be? No doubt the NHS will be reviewing large volumes of data to deliver the insight into what drugs are prescribed where and to treat what, in their efforts to deliver their buying efficiencies. The pharma sector will need to follow the same process if they are to build up a really detailed picture of their sales at every level of NHS operations, if they are to emerge as 'winners' at the end of the process.

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Understand your real strengths

Building a detailed picture of the patterns of prescription for your drug portfolio based on actual use is a very necessary first step to understand what within your portfolio might be at risk and what is likely to be targeted by your competitors. But how easy is that to achieve? Most sales focussed data available showing market share for you and your competitors delivers at an aggregated level and for broad therapy areas – what's really needed is the ability to drill down much deeper, so you can assess specific drug usage at an institution level and by indication as well as by therapy area.

Specialist Share Data

Specialist Share data offers a unique insight into how your products are really being prescribed and how your direct competitors compare. So, whether you are looking to assess competitor threats or understand the size of a relevant patient universe, the insight it provides into specialist care treatment is invaluable.

For the first time you will have visibility of prescribing behaviours by indication and brand and every level of the NHS. Based on a unique and highly accurate data set built on 10 years' experience of working with trusts or their devolved equivalents you can see and understand exactly what your market share is for every product and how it ranks against your competitors.

Therapy areas

Specialist Share Data (SSD) has been developed to be the ultimate data source for delivering unique insight into specialist care treatment and covers a wide range of therapy areas:
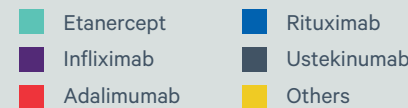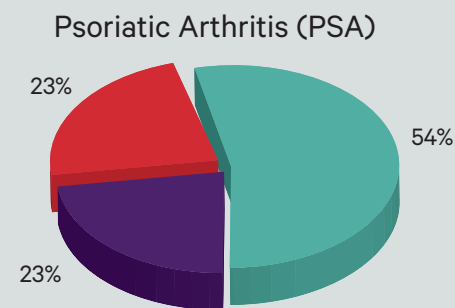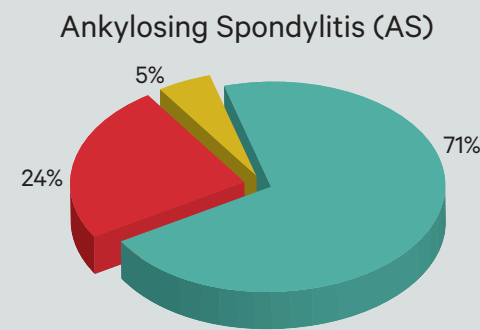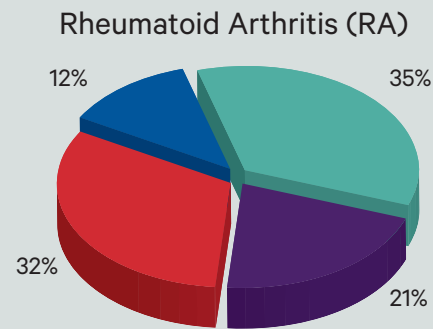
We routinely collect a wide range of specialist disease areas, such as those in inflammation and immunotherapy, ophthalmology, neurology and oncology and haematology. We also provide the flexibility to supplement this with other disease areas as and when necessary

To deliver consistently high levels of detail and accuracy, Specialist Share Data is constantly reviewed and updated for all the major therapy areas it covers. Multiple checks are used in validation to ensure it delivers exceptional detail in a highly usable format.

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Deliver detailed insight – a hypothetical example for Rheumatology

Burton Hospitals Trust
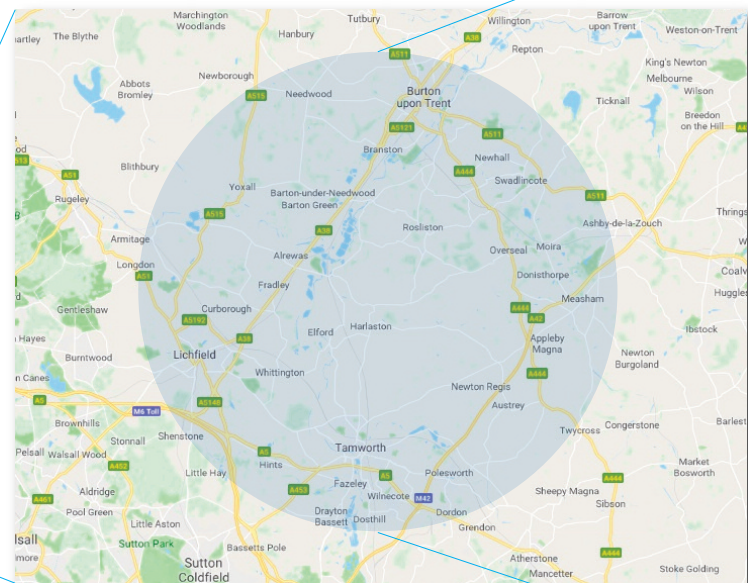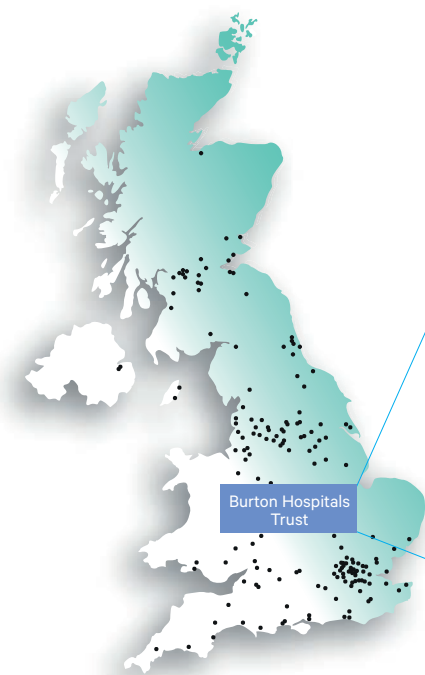
Aesthetics	Hypertension
Anaethesia	Immunology
Andrology	Infectious Diseases
Anti-Infectives	Internal Medicine
Arthritis Bioelectronics R&D	Liver Diseases
Bio-Medicines	Mental Health
Biopharmaceuticals	Mental Health - Schizophrenia
Bleeding Disorders Therapies	Metabolism
Cardiology	Neglected Tropical Diseases
Cardiometabolic Diseases	Nephrology
Cardiovascular Cell	Neurology
And Gene Therapy	Obesity And Weight
Critical Illness	Management
Dental And Nutritionals	Oncology
Dermatology	Ophthalmology
Diabetes	Orthopaedic
Endocrinology	Paediatrics
Fertility Fibrosis	Pain
Fluid Replacement Therapies	Plasma Derived Proteins
Gastroenterology	Pulmonary Therapies
Growth Hormone Therapy	Rare Disease
Gynaecology	Respiratory
Haemoglobin	**Rheumatology**
Hereditary Angioedema	Thrombosis
(Hae) Therapies Hiv/Aids	Urology
Hormone Replacement	Vaccines
Therapy	Wound Healing Therapies

Rheumatoid Arthritis (RA)

12% · 35% · 32% · 21%

Ankylosing Spondylitis (AS)

5% · 71% · 24%

Psoriatic Arthritis (PSA)

23% · 54% · 23% · 23%

Legend:
- Etanercept
- Infliximab
- Adalimumab
- Rituximab
- Ustekinumab
- Others

THE SSD TOOL
Specialist Share Data allows you to focus right down to an individual institution level, by disease and by indication. You can also understand number of treated patients by drug type and market share by indication. SSD is the only data tool that delivers the information and insight you need at individual institution level.

INSTITUTION LEVEL INSIGHT
SSD delivers pin-point data at an individual institution level by disease area giving you real insight into:
- Share of number of patients by drug
- Rank & index of patients by drug and indication type
- Number of patients in banded number per drug

ENHANCED INSIGHT TAILORED TO YOUR REQUIREMENTS
SSD can be tailored to your specific requirements allowing you to understand behaviours and brand usage by indication and account:
- Tailor by product and indication
- Tailor by territory, sales team area, STP footprint
- Tailor by institution

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