

Modelling pricing and market dynamics in a competitive therapeutic landscape across the EU4 and UK markets

What our client needed

Our client wished to understand how pricing and market dynamics were impacting the uptake of their product in France, Germany, Italy, Spain, and the UK.

Operating in a highly competitive disease area, the client was looking for insights into key factors that could influence uptake. These included price, product attributes, prescribing habits, and openness to adopting value-based pricing agreements.

How we supported them

Our Health Economics and Global Market Access experts collaborated to create an innovative solution for our client: a price-volume analysis tool, validated by secondary desk research and primary stakeholder interviews.

In a five-step project process, the team:

1. Conducted detailed desk research to understand price elasticity of demand in healthcare
2. Identified potential influencing factors of product price and volume uptake (including any country-specific nuances) through interviews with the client's internal stakeholders
3. Validated findings through global payer interviews, assessing the impact and likelihood of factors affecting drug pricing and volume uptake post-launch. Payers completed a hypothetical price testing exercise to establish an optimal price corridor for our client's product. We then probed the acceptability and influence of value-based pricing agreements in their market; a risk matrix approach was used to compare all factors
4. Created a bespoke, interactive, and customisable price-volume decision-making tool in Microsoft Excel®, using insights from Phases 1–3 and our client's sales data
5. Conducted training sessions with the client to demonstrate tool usage and discuss payer insights in depth

Additionally, a research deck with insights from global payers, focusing on subnational levels, was provided. It covered treatment uptake drivers, challenges, influential factors, payer price ranges, and value-based pricing perceptions.

We also developed a user guide that enables users to navigate and make updates to the tool as further sales data become available.

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The outcome

The tool provided our client with a holistic understanding of all potential influencers of volume uptake within each nation in the client's crowded therapy area. The tool estimated the likely volume of prescribed products for different price points, to help our client understand the optimal price corridor. The tool also considered the impact of competitor product uptake and patient demographics, further deepening our client's understanding of quantitative influencers of uptake based on existing data.

Overall, the price-volume tool enabled the client to have informed discussions with payers, exploring the country-specific factors influencing volume uptake of the product, supported by relevant insights and real-world data. The tool also enabled them to adjust their market access and pricing strategies to best align with payer priorities in each nation. Lastly, it helped them to understand how their offering around value-based pricing and strategic contracting could be used to further influence volume uptake post-launch.

How we added value

We combined multiple information sources (e.g. from desk research, internal affiliate information, global payers, client sales data) into one tool to ensure that insights were highly relevant and specific to the client, supporting them in future strategic decision-making across market access and commercial functions.

In addition, we collaborated with client affiliates in all five regions (UK, France, Italy, Spain, and Germany) throughout the project, culminating in a global training workshop. This ensured that the tool was not just relevant to our client in the UK but would also support their global colleagues' strategic decision-making.