Navigating Market Access with Magnolia

How to get the Biggest ROI on Research? Applying Market Access Insights Throughout the Product Lifecycle

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Today's Moderators and Invited Expert Panelists

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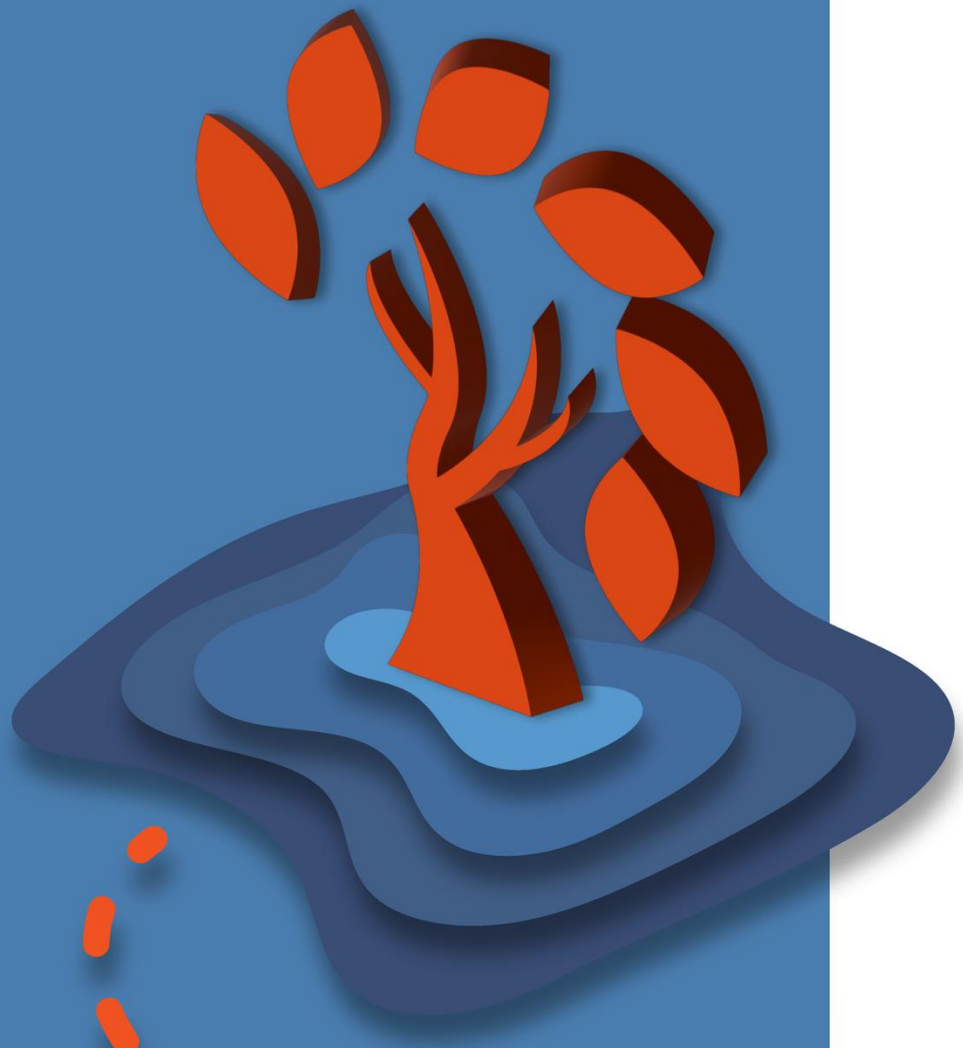

Panel Topics

- Best practices in market research
- Importance of market research timing
- Market research considerations to support coverage and reimbursement
- What pharmaceutical companies are doing right (or wrong) in market research
- Key takeaways

Payer Market Research Best Practices

Engaging the right stakeholders at the right time with the right approach to generate the right evidence

Right Stakeholders

complex, fragmented healthcare system requires engaging the right stakeholders

Right Methodology

mix of qualitative (ad boards, interviews) and quantitative (surveys, discrete choice modeling) strategies

Right Timing

time research with development cycle. Start early to initiate access strategy planning, deepen research to refine strategy, and post-launch tracking

Right Evidence

focus on evidence to supplement clinical trial data to inform HEOR models, and RWE planning

Panelist Thoughts

What makes market research "high quality" from your perspective?

How can companies best validate that payer insights are actionable?

Importance of the Timing of Market Research

Iterative process across drug development and commercialization lifecycles

	Early Development Preclinical – Phase I	**Mid-Development** Phase II – Early Phase III	**Late Development** Phase III – Pre-Launch
Goals	Understand reimbursement landscape and payer unmet needs	Refine target product profile (TPP) and test payer expectations	Develop and refine value story and access strategy
Key Research Activities	Landscape assessment (payer trends, identify analogues) Test early value propositions (endpoints, comparators)	Payer advisory boards, interviews Willingness-to-pay and access testing Early pricing research	Quantitative payer research Test pricing, contracting, access scenarios Value message testing RWE plan development and testing
Importance	Align trial design with payer-relevant outcomes; initiate access planning	Guide comparator choice, endpoints, HEOR models	Anticipate formulary/access barriers (eg, step edits, prior auth, tiering)

Importance of the Timing of Market Research

Iterative process across drug development and commercialization lifecycles

	Launch Approval – Year 1	**Post-Launch** Years 1+
Goals	Optimize access and adjust to payer feedback	Maximize access, defend value, plan lifecycle management
Key Research Activities	Primary and secondary research on early coverage decisions Message testing for payer teams Tracking adoption and restrictions	Monitor coverage and formulary placement Access planning for new indications/formulations Evidence-gap assessment and RWE planning
Importance	Support rapid adaptation in contracting and evidence	Ensure continued competitiveness and payer alignment

Panelist Insights

At what point in the product lifecycle is payer input most critical?

How frequently do you speak with manufacturers / review a TPP and do you feel you should have been consulted earlier?

Who is most important to engage?

How often should pharma revisit payer insights as data evolve?

How Market Access Research is Performed

Choosing the appropriate methodological approach to generate meaningful evidence

Qualitative vs. Quantitative

Identify when to apply in-depth interviews or advisory boards versus large-scale surveys

Primary vs. Secondary Research

Assess how direct payer input complements claims, epidemiology, or published data

Discrete Choice / Conjoint Analysis

Quantify trade-offs in pricing, access, and product attributes

Advisory Boards & In-Depth Interviews

Explore perceptions, evidence needs, and real-world barriers

Landscape & Policy Research

Map the evolving access environment and competitive positioning

Panelist Perspectives

What are the biggest evidence gaps you see when a new therapy comes to market?

How do you see evidence requirements evolving beyond just clinical evidence? How important are PROs and cost-effectiveness research?

Can you share an example where stronger evidence might have changed your decision?

Considerations When Selecting Clinical Trial Endpoints

Think beyond regulatory approval and align with payer priorities

- **Clinical relevance:** outcomes are clinically meaningful and patient-centered (eg, survival, hospitalization rates, disease progression, functional status, quality of life)
- **Comparative value:** endpoints demonstrate how the therapy performs relative to the current standard of care, not just versus placebo
- **Health system impact:** endpoints connect to economic and utilization outcomes (eg, reduced ER visits, hospitalizations, long-term complications)
- **Generalizability:** endpoints reflect outcomes in real-world patient populations (not just narrowly defined trial groups) that are diverse
- **Duration and durability:** endpoints reflect both short-term efficacy and long-term safety and durability
- **Regulatory vs. payer needs:** endpoints are a balancing act (surrogate endpoints vs. real-world value)

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Panelist Wisdom

Which type of trial endpoints have the greatest impact on your reimbursement decisions?

From your perspective, how often do the endpoints chosen by manufacturers align with what you need as a payer?

Do you think pharmaceutical companies are doing enough to connect clinical endpoints with cost and utilization outcomes?

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Payer Market Research to Support Coverage and Reimbursement

Connect clinical innovation and market access, and 'de-risk' your market access strategy

Clinical Development

Design trials that generate data payers recognize as meaningful for coverage decisions

- Align trial endpoints with payer-relevant outcomes (eg, hospitalizations, cost offsets)
- Ensure appropriate comparator selection
- Identify HEOR/RWE evidence needs

Value-Driven Coverage & Access Strategy

Build a compelling value story and evidence to justify price and improve the likelihood of better access / fewer coverage restrictions

- Test payer willingness-to-pay and acceptable price ranges
- Gather feedback on value messaging for dossier and payer-facing material development
- Evaluate payer reactions to anticipated formulary placement, tiering, utilization management, etc
- Assess contracting preferences (eg, rebates, outcomes-based)
- Identify RWE or patient-reported outcomes evidence gaps

Panelist Sentiments

Other than conducting a H2H trial, what advice would you give manufacturers to ensure clinical trial evidence translates into real-world payer relevance?

What's an example of a value message or evidence package that really resonated with you—and what made it effective?

How do you see contracting and rebating evolving?

How do you assess manufacturer-developed cost-effectiveness or budget impact models? What makes them credible or less useful to you?

What Pharma Gets Right—and Where It Falls Short

Insights into industry best practices and persistent challenges

Best Practices

- Engaging payers earlier in development (by some)
- Increasing use of real-world evidence (RWE)
- Incorporating patient-reported outcomes & quality of life measures
- Greater transparency in cost-effectiveness and budget models

Persistent Challenges

- Designing trials only for regulatory approval, not reimbursement
- Limited head-to-head comparisons vs. standard of care
- Overly narrow, non-representative trial populations
- Delayed or minimal payer input until post-approval
- Opaque, optimistic economic models lacking validation

A Word from Our Panelists

How do you define value in your decision-making, and how does that differ from how pharma frames it?

What role does real-world evidence play in supporting coverage decision-making?

Key Takeaways

Plan evidence generation with payers in mind and engage with payers early and iteratively

Early and iterative payer engagement maximizes research ROI

Trial designs must balance regulatory and reimbursement relevance

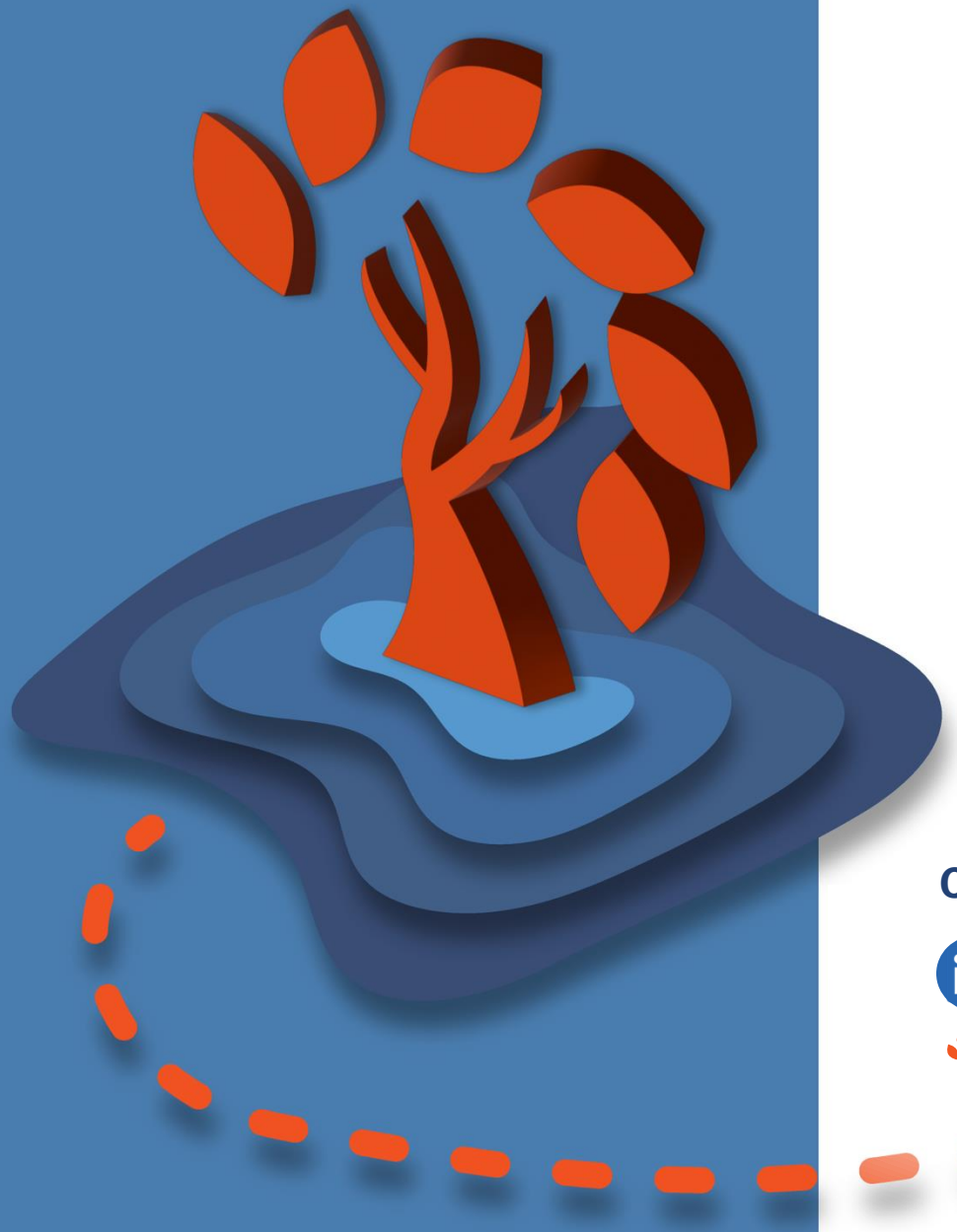
Strong market research builds mutual understanding and improves patient access

Final Thoughts from our Expert Panelists

If you could give one piece of advice to pharma companies about generating evidence that truly matters to payers, what would it be?

As healthcare moves toward value-based care, what kinds of evidence will become even more important in your decision-making over the next 12-18 months?

If you had to summarize in one sentence, what does pharma need to do differently to ensure their research delivers maximum ROI and supports coverage?



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Thursday, October 23, 2025
12:00 - 1:00 PM Eastern

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