

Value recognition of combination vaccines: What is needed to support access and uptake?

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Introduction

Combination vaccines have long been a cornerstone of immunisation efforts, simplifying the vaccination process by protecting against multiple diseases in a single shot. Historically, they have been used to combat childhood illnesses, such as DTP (diphtheria, tetanus, pertussis), but their application has expanded significantly in recent years.¹ The growing burden of respiratory diseases and the emergence of new technologies are driving innovation in combination vaccine development. With overlapping opportunities to address diseases like COVID-19, influenza and RSV (respiratory syncytial virus), the investment for such vaccines is accelerating.^{2,3,4}

Advancements like mRNA platforms are fueling this trend, enabling the development of more efficient and effective combination vaccines.⁵ While combination vaccines offer significant clinical benefits, their complexity introduces notable challenges for healthcare systems, particularly in navigating regulatory approvals, ensuring access and securing reimbursement.² Recognizing the value of combination vaccines is critical to enable their contribution to global health efforts by reducing disease burden while maintaining sustainable healthcare budgets.⁶

Methodology

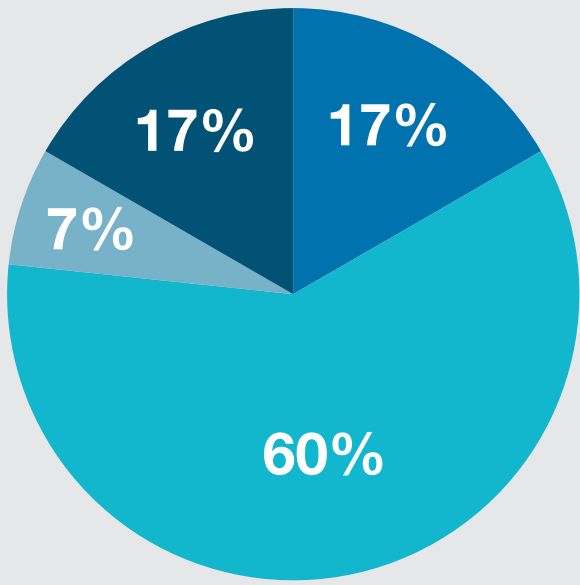
Literature review

Searching academic journals, industry reports and publications to identify key insights on the value and access considerations for combination vaccines

Online survey

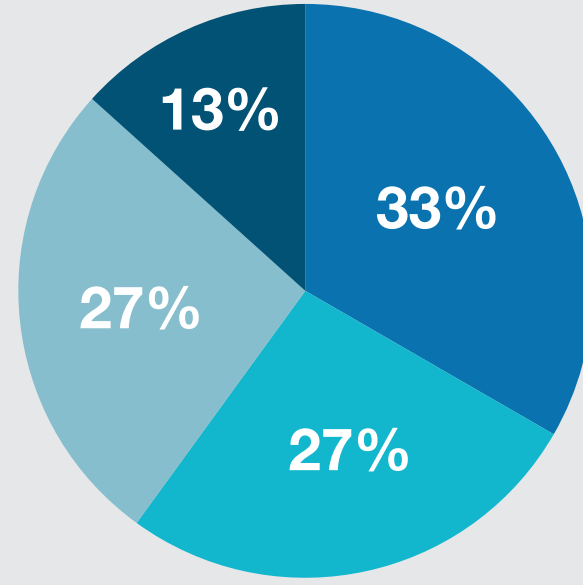
A diverse range of stakeholders participated in the survey, totaling 30 respondents

Survey sample



Geographical regions

- US (n=5)
- Europe (n=18)
- Asia (n=2)
- Global (n=5)



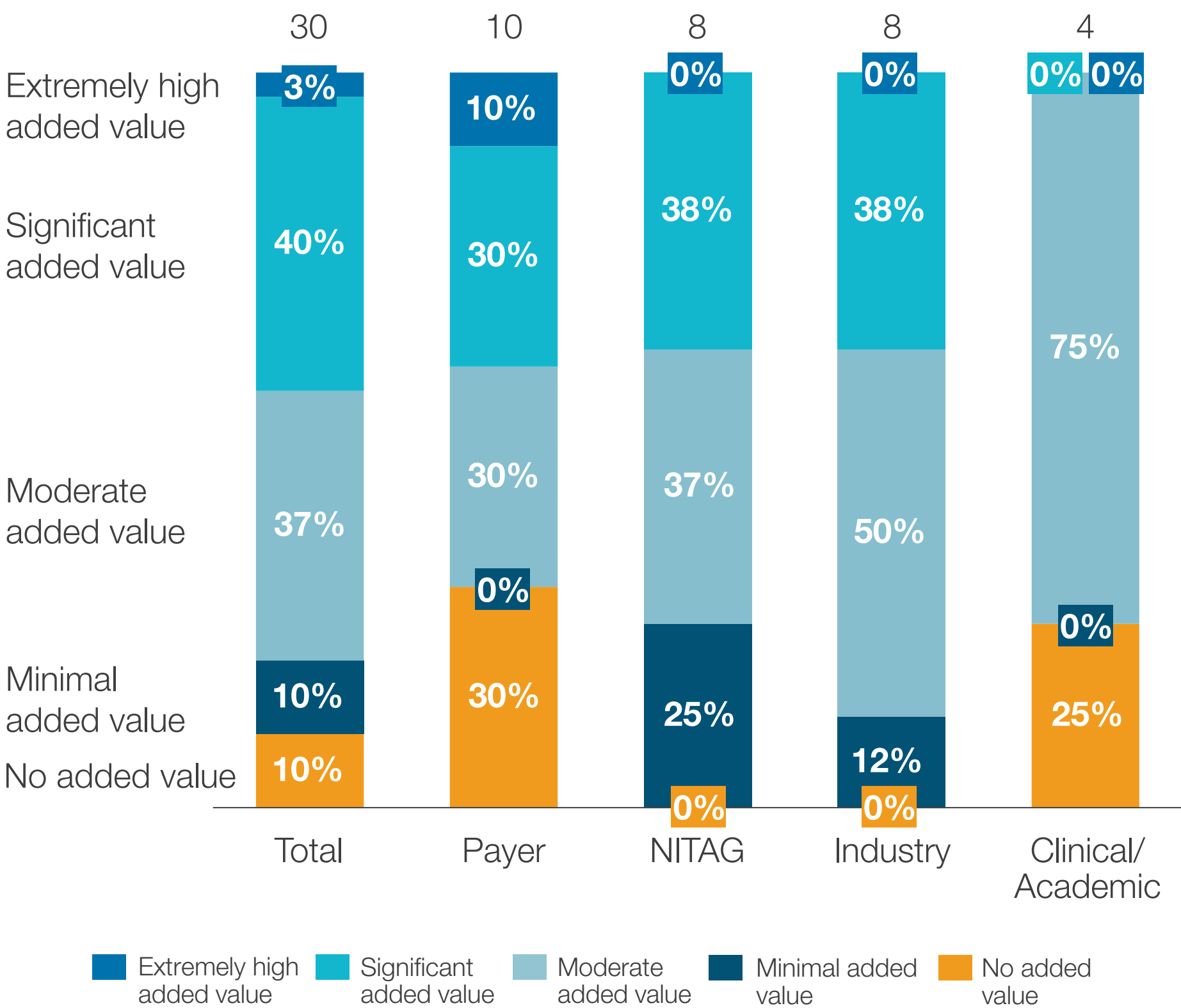
Stakeholder types

- Payers (n=10)
- NITAG members (n=8)
- Industry (n=8)
- Clinical/Academic (n=4)

Results

Added value of combination vaccines

To understand the general perception of combination vaccines, we evaluated stakeholders' impressions of combination vaccines' added value



- There is a clear discrepancy in terms of perception of added value of combination vaccines between payers and NITAG/industry stakeholders
- 30% of payers do not see any additional value in a combination vaccine, which is a big issue for the vaccine manufacturers

Assessment drivers/limiters

Next, we evaluated the factors influencing assessment outcomes from different perspectives



Drivers

- Increased patient compliance and improved coverage for patients
- Enhanced protection against multiple diseases with a single vaccine
- Increased convenience for patients and healthcare staff
- Simplification of immunisation schedules
- Simplified logistics and reduced storage requirements

Limiters

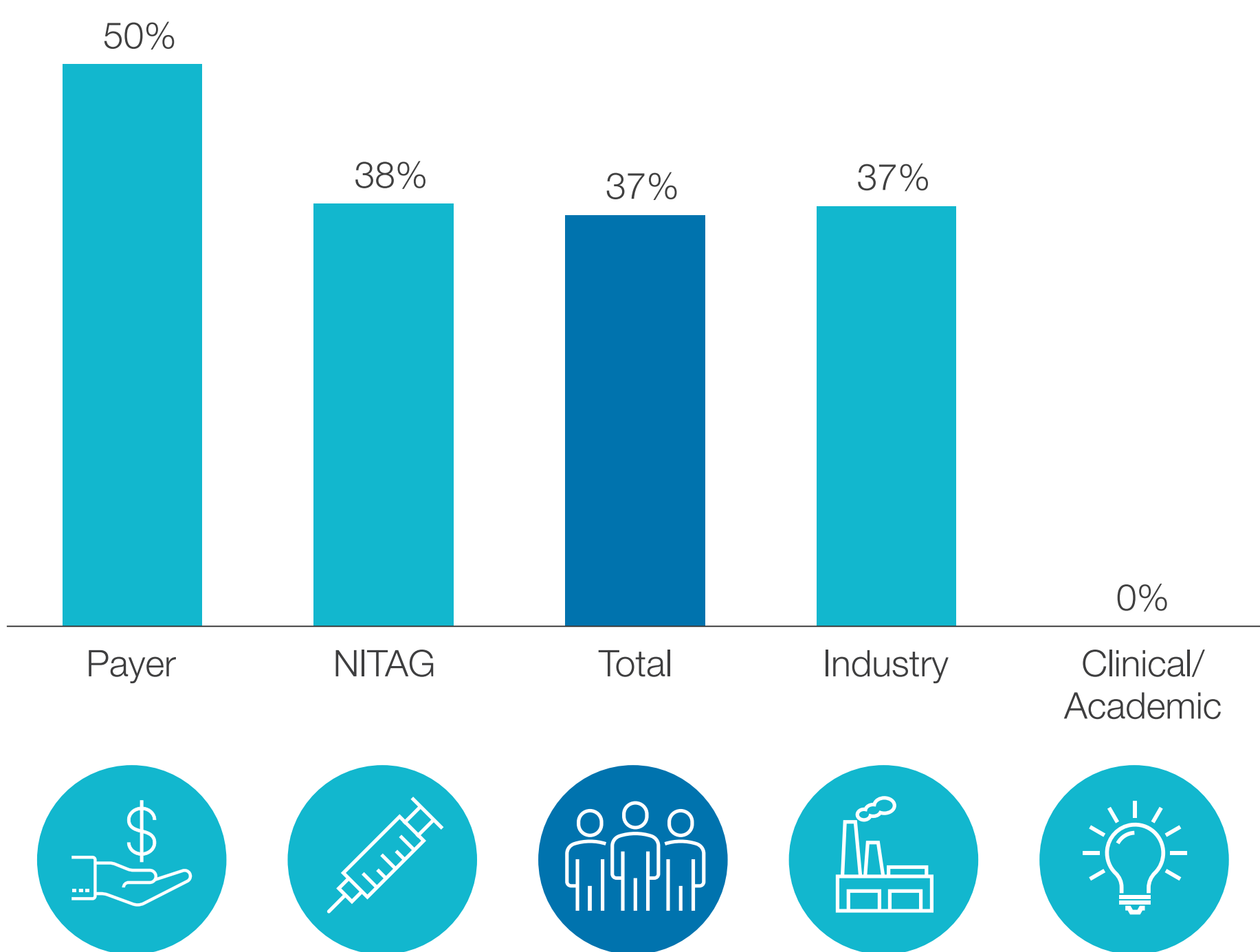
- Potentially incompatible duration of protection or seasonality
- Higher cost compared to individual vaccines
- Increased risk of adverse reactions due to multiple components
- Complexity in regulatory approvals and market access
- Challenges in educating healthcare providers and patients about the combination vaccine

- Respondents were largely aligned on the key advantages and limitations of combination vaccines
- Overall, respondents highlighted more drivers than limiters, emphasising the added value of combination vaccines

*Drivers and limiters above not exhaustive
• Additional drivers: easier tracking of vaccination records, savings in healthcare resource utilisation, reduced adverse events due to reduced number of injections
• Additional limiters: potential for reduced flexibility in vaccine scheduling, limited availability or higher demand, reduced financial incentives for healthcare workers administering vaccines

Proportion of respondents who expect lower prices for combination vaccines vs sum of individual components

Finally, we assessed expected pricing dynamics for combination vaccines from the perspective of different stakeholders



- Payers are more likely to expect discounts for combination vaccines compared to other stakeholders, with 50% of payers saying they expect a lower price

Conclusions

- Although majority of stakeholders across the vaccines industry are aligned on the added value of combination vaccines, **payers are most skeptical with 30% not seeing any additional value**, which will likely **create pricing and funding challenges**
- It will be crucial to amplify value drivers such as **increased convenience and compliance, enhanced protection** against multiple diseases, and **simplified logistics** of immunisation, while mitigating value limiters such as potentially **incompatible seasonality, greater risk of adverse events**, regulatory complexity, and education challenges
- Despite these advantages, majority of **payers expect prices to remain lower** to the sum of individual vaccines
- While **payers** are likely to leverage combination vaccines as an **opportunity to reduce costs**, **industry stakeholders** may emphasise the convenience and overall healthcare resource savings to **justify maintaining prices**
- Overall, combination vaccines represent an **opportunity to increase vaccination rates** and overall vaccine protection, while providing **economic benefits to both payers and industry**

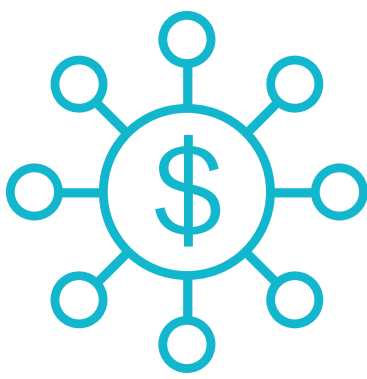
Implications

Three key levers can help stakeholders maximise the value of combination vaccines and support access and uptake



Generate data

- Quantify healthcare resource utilisation and economic savings across geographies
- Demonstrate increased compliance, uptake and resulting herd immunity benefits through real-world evidence



Communicate value

- Emphasise the value of improved immunisation schedules on broader society
- Highlight the benefits of increased uptake and compliance on achieving broader country vaccination goals to ensure broader healthcare system buy-in
- Deploy education campaigns to familiarise healthcare professionals with combination vaccines and their advantages over individual vaccines



Shape policy

- Drive synchronisation of strain selection processes (e.g. WHO) to facilitate development of seasonal combination vaccines
- Ensure recognition of the broader value in vaccine assessments to capture the full benefits of combination vaccines

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