



LOOKING AHEAD:

# 5 Trends Driving Healthcare Access in Emerging Markets in 2021

The healthcare access landscape in emerging markets has evolved significantly over the last decade. Shifts in disease patterns and population trends, scientific advancements and persistent gaps in the health system have required significant agility by today's market access industry players. In 2020, the COVID-19 pandemic revealed to the world what access players have known for some time – the healthcare system is not set up to properly care and manage the needs of today's population.

How can the private market access industry best complement health systems to overcome these challenges? How can it build upon its successes to date and scale solutions to reach more patients in more places?

To help answer these questions, Axios gathered key insights from our conversations with pharmaceutical market access leads from around the world. Their input has been grouped into five key themes that provide a window into how the industry is responding to the needs of today's healthcare landscape.

## KEY TRENDS

1

Access is being **re-defined** – from a short-term strategy to a long-term solution.

2

**Affordability** is only the beginning.

3

There is a growing focus on **reaching patients outside the hospital.**

4

Companies are exploring new ways to **engage with governments on access.**

5

**More relevant data** is needed to inform access decision-making.

## 1 Access is being re-defined – from a short-term strategy to a long-term solution.

Treatment access solutions for patients paying out-of-pocket for treatment were traditionally seen as a short-term strategy until a treatment was reimbursed in the country. For many years, pharmaceutical companies clung to the hope that governments would be able to reimburse specialty, high-cost treatments in the same way it was done with primary care medications.

But as government priorities shifted and budget cuts remained, companies have begun looking to alternative access solutions such as patient assistance or support programs as long-term solutions, prompting a series of shifts in how access is defined and prioritized:

*“Patient Support Programs (PSP) do not necessarily translate into reimbursement or faster market access. However, PSPs can help provide patients with access to their full course of treatment, and it also has additional value for healthcare providers.”*

### COMPANIES ARE CONSIDERING ACCESS EARLIER.

*“We’ve started thinking about access as early as the R&D phase.”*

*“PSP are now blended as part of the brand planning.”*

*“We need to improve [understanding] of ‘end-to-end’ access from phase 2 onwards, which means it is important to involve R&D departments, global teams...”*

### INTERNAL CAPACITY BUILDING IS A GROWING PRIORITY.

*“Capability building within the organization is important... Moving forward, all toolkits, templates will be handed over to the countries so that the initiatives are locally-driven and owned.”*

*“We need to help people understand how to move from strategy to implementation.”*

### SUSTAINABILITY IS KEY.

*“Sustainability is a key theme now and Patient Assistance Programs (PAP) need to be sustainable at a country, regional and global level.”*

*“PAPs should be self-sustainable. For example, a positive P&L driven by a PAP can be re-invested into PSP initiatives.”*

*“Before 2019, nobody even looked at LMICs within [company] or tried to understand how relevant the countries were to the overall picture. The belief now is that access must be at a broader scale with a focus on LMICs.”*

COVID-19 has only exacerbated reimbursement challenges faced by pharmaceutical companies. It’s also increased the number of people who have lost their jobs and are no longer covered or able to afford private insurance – making sustainable access solutions more important than ever.

## 2 Access no longer stops at affordability.

Access is a multi-dimensional issue, and it must be addressed with multi-dimensional solutions. To maximize treatment outcomes, access solutions have evolved from focusing solely on treatment affordability to offering services to support patients throughout their treatment journey – from diagnosis to treatment adherence. Growing rates of chronic diseases requiring life-long treatment have made the need for adherence solutions more important than ever, and many companies are exploring how digital tools can be used to support patients.

*“PSPs should focus more on health systems strengthening and capacity building. They should also look at the full patient journey.”*

*“Digital is now being seen as an enabler and optimizer for access.”*

*“We are looking at the whole patient journey – end-to-end solutions, diagnostics, patient navigation support.”*



*“One of our primary objectives is focusing on holistic access solutions for 2021 to address the whole patient continuum – like patient and provider education, diagnosis and adherence support.”*

### 3 There is a growing focus on reaching patients outside the hospital.

For centuries, hospitals and health facilities have been the central pillar of health systems. Yet the world has radically changed. Through it all, the healthcare sector has remained mostly unchanged, generating a significant void outside health facilities. Most health systems don't have the infrastructure, the network and the capacity to communicate with patients when they leave the hospital. The result is poor treatment adherence and less than optimal medical outcomes.

#### THE COVID-19 PANDEMIC HAS MADE THIS GAP ABUNDANTLY CLEAR:

*"COVID-19 did impact our sales...some treatments were more affected than others. Mobile clinics would be beneficial, but the question is the willingness and affordability from a company perspective – there is a need, but no one wants to take the risk."*

*"Some public hospitals turned into COVID-19 hospitals and patients could no longer receive care. Now they started returning to the hospitals and taking the risk of being infected with COVID-19 because their medical condition was deteriorating."*

*"Some hospitals started providing patients with prescriptions for 2-3 months to avoid having to expose the patient on a monthly basis. But there is a risk of waste of resources in case the patient passes away before consuming treatment."*

*"We need more community health initiatives. Care for oncology patients cannot just be concentrated in the big cities due to inability to travel as a result of the lockdown."*

*"To overcome delays in adherence, in some countries they sent buses around where the patient hops in and gets their infusion."*

Hospitals and clinics can no longer do the job alone. Beyond the pandemic, solutions are needed to complement the existing health system and close these dangerous gaps outside health facilities affecting access to care and treatment. The private sector, including pharmaceutical companies, are well positioned to expedite the change that is needed.



### 4 Companies are exploring new ways to engage with governments on access.

Government engagement is a key success factor for a sustainable access strategy. However, companies are finding it difficult to engage with governments on treatment access beyond traditional reimbursement discussions.

#### EXPLORING ALTERNATIVE COLLABORATION SOLUTIONS

*"Governments are not always open to working with private entities."*

*"We need to consider other solutions that would be acceptable in the public sector since they are not interested in tiered pricing solutions. [Some believe they] encourage inequality and bias."*

*"One alternative is to partner with authorities on innovative access agreements, like managed-entry agreements and alternative contracting."*

*"It is necessary to engage multiple ministries to determine willingness to invest, not only the Ministry of Health, but the Ministry of Finance too for example."*

*"With specialty products, value-based contracting will be more and more important."*

#### SHAPING A WELCOMING ENVIRONMENT FOR ACCESS

*"How do you ensure the environment is possible for solutions? We must invest in public affairs, education and policy shaping."*

*"We need policy shaping that is not so high-level. How do you transform white papers to reality?"*

Companies and other access stakeholders must find new ways to not only engage, but also educate governments on the value of collaborative solutions and the need to look beyond traditional approaches to minimize burden and move the needle forward on access.

## 5 More relevant data is needed to inform access decision-making.

As access becomes more integral to product strategy, the need and interest for robust data to inform access decisions has increased. The data needed to inform access decisions can be different than data typically collected via clinical trials or post-marketing studies. Data from access programs can provide breakthrough insights on the disease evolution, treatment, patients' perceptions, outcomes and cost.

For this reason, companies are exploring approaches to capture access-related real-world data (RWD) to better understand the impact of access interventions. While digital tools have a role to play in data collection, companies are beginning to see these tools as enablers, and not stand-alone solutions.

*"Monitoring is a huge unmet need in access."*

*"Understanding compliance rates and the impact of a product on a patient's life using local data will be helpful for all stakeholders - authorities, patients, physicians etc. This data could be generated/collected from the programs and ideally published."*

*"We are keen to understand the impact of the PSP on various stakeholders."*

*"It is easier to demonstrate the medical value of a product, but economic and social value is more challenging. and for this we need to be able to demonstrate more what our products will bring."*



# Access is no longer a "good to have."

Access to healthcare solutions are being increasingly integrated in the business models of pharmaceutical companies. This integration is driven by a concerted effort to develop access models that are sustainable instead of one-off, short-term solutions. However, true sustainability will require a multi-sectoral, multi-dimensional response.

Our healthcare system is no longer adapted to the needs of patients living in our rapidly changing world. The COVID-19 pandemic brought to the open a widening gap outside health facilities that we, the access specialists, identified several years ago. Unless they are addressed, these gaps will result

in less and less effective healthcare for patients, suboptimal treatment outcomes and an inability to respond to future public health challenges. It is unlikely that the healthcare system will be able to close these care and treatment gaps alone.

Companies, access specialists, NGOs and civil society have a critical role to play in closing the access gap by working with governments to ensure that patients have access to quality care and treatment wherever they are.

### ABOUT AXIOS INTERNATIONAL

Axios International is a pioneering healthcare access company with more than 23 years of specialized experience developing practical and sustainable solutions to patient access challenges in emerging markets. Axios has designed and implemented patient access solutions in more than 100 countries across the globe.

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