

THE 20SENSE REPORT

SPOTLIGHT ON THE CANADIAN
SPECIALTY PHARMACEUTICAL MARKET

JULY 2020, ISSUE 13

20
SENSE

Making sense of Canada's
specialty pharmaceutical market

Behind the Scenes of a Pandemic

The Canadian specialty pharmaceutical market
has responded to the Covid-19 crisis with
ingenuity, diligence – and above all, humanity

How Specialty Pharma Shifted Gears During the Pandemic – and What Will Change Forever

Covid-19. March 2020. A time the world will remember forever. The pandemic could have spelled disaster for Canada's specialty medicine sector – but that's not what happened. The sector responded to the challenge with breathtaking speed and creativity, ensuring that patients continued to receive their life-saving treatments.

Flattening the fear

The news of the pandemic left many Canadians afraid. Understandably, the fear rose still higher in patients on specialty medications, many of whom live with serious chronic diseases and compromised immune systems. For many, Covid represented the classic rock-versus-hard-place dilemma: they either went to the hospital or clinic to receive care and risked exposing themselves to the virus, or they skipped the visit and risked a downturn in their existing health conditions.

In the early days of Covid, many patients chose the latter option, cancelling their

appointments and hunkering down at home. Manufacturers, service providers and patient organizations knew this couldn't go on: health outcomes depend on continuity of treatment. Without fuss or delay, these specialty stakeholders set about creating the safe environments that would bring patients back to the clinic. They modified or relocated clinics to meet the new realities of safe patient care, sped up and spaced out patient visits, and scrubbed everything down. Anticipating shortages of personal protective equipment (PPE), they sourced PPE supplies from all over the world to properly equip health professionals and patients during treatment – all within weeks.

The Canadian Cancer Survivor Network sent out newsletters to the patients it served, with straight facts about the risks of the virus to this group.¹ Along similar lines, All.Can Canada (a not-for-profit organization focused on patient priorities in cancer care) partnered with the Covid-19 Oncology Patient Support Task Force to create a

resource hub for cancer patients requiring help with day-to-day living, social connection, and mental health.² Such initiatives helped patients take control of their fear and make informed decisions.

Technology to the rescue

Some treatments require in-person visits, but the sector soon learned that many operations could move to the phone or computer screen. Prior to Covid, 90 percent of physician-patient consultations took place on site.³ By April 2020, the balance had shifted dramatically, with 40 percent of consultations occurring by phone and 11 percent by video.³ These telemedicine consultations surged in virtually all therapeutic areas, from circulatory and nervous system diseases to pregnancy and postnatal health.⁴ High-tech medical equipment such as Bluetooth stethoscopes and apps to assess eye exams abetted the trend.³ After years of predictions that did not materialize, virtual care finally got its moment in the sun. →

CONTINUED FROM PAGE 1

To support this development, the Ontario health ministry created new billing codes for telephone and video appointments.⁵ Turning on a dime, regulators made it possible for health providers to use such platforms such as Zoom and Skype,³ while health centres enabled patients to access their prescriptions and test results electronically.⁶ Many hospitals replaced in-person visits for non-urgent care with virtual consultations. Indeed, within weeks of the pandemic announcement, virtual visits represented the lion's share of consultations at Women's College Hospital and Unity Health in Toronto.⁶

Pharmaceutical representatives dove into the virtual world with equal speed and enthusiasm. While the frequency of their touchpoints with physicians declined following this shift, a survey revealed that their interactions became more substantial, lasting an average of 17 minutes instead of the previous six.⁷ Emails between reps and doctors also mushroomed.⁷

Pillars of support

Most specialty therapies include patient support programs (PSPs) to guide patients through reimbursement and treatment, and PSP providers lost no time adapting to Covid. Infusion clinics worked with medical personnel to identify patients who could follow rapid-infusion protocols or self-inject, thus minimizing person-to-person contact.⁸ In a remarkable show of solidarity, Canada's PSP service providers formed a clinic working group to support patients – as well as each other – throughout the pandemic.⁹

When the country locked down, millions of Canadians experienced job losses or layoffs that eroded their health benefits, which left many patients unable to afford their specialty-drug copayments and deductibles. Indeed, almost half of PSPs saw an increase in patient requests for financial assistance.¹⁰ Specialty manufacturers and PSP providers responded with a chorus of reassurance, helping patients bridge financial gaps so they could continue treatment without interruption.

Innovation in motion

In the fight against Covid, Canadian pharmaceutical innovators quickly joined the scramble to develop effective diagnostic

tests, treatments, and vaccines. As early as March 12, AbCellera, a Vancouver biotechnology company, penned an agreement with Eli Lilly to develop antibody products for preventing Covid-19.¹¹ Their raw materials? Over 500 unique antibodies isolated from an early US patient who recovered from the disease.¹¹ Bayer Canada, meanwhile, teamed up with the Population Health Research Institute on a clinical research program focused on Covid-19 treatments.

Among Innovative Medicines Canada members, AstraZeneca ramped up its diagnostic testing capabilities and is now collaborating with governments on screening programs; Roche is offering its testing solutions to provincial public laboratories and working with governments to align their testing strategies with regional needs; not to be outdone, Sanofi is teaming up with a start-up called Luminostics to develop an over-the-counter self-testing solution.¹² The list goes on.

The industry has also reached out to communities in need. At the end of April, Novartis Canada and Sandoz Canada created the Community Strong Covid-19 response program and injected it with \$500,000.¹⁴ The program assists communities facing poverty, home insecurity and social isolation.¹⁴

Novel virus, unique clinic collaboration⁹

When the lockdowns began, specialty medication service providers fielded daily questions from their clients: How will you provide infusions to patients? How will you keep everyone safe? How will you stay a step ahead of the pandemic?

It took just a few days for four leading clinic providers – Bayshore, Coverdale, Innomar, and INVIVA – to join forces and create a national clinic working group to help each other maintain their patients on treatment – safely. The group supported each other in the development of infection control guidelines, including pre-visit screens for patients and staff. They updated their business continuity plans. When some clinics closed, leaving some patients without their “home base,” they redistributed their collective patient load so that nobody fell between the cracks.

Thank you to all stakeholders in the specialty pharmaceutical sector – manufacturers, PSP providers, and front-line workers – for their Herculean efforts to date. Patients also deserve thanks for their strength and adaptability in these strange times.

Lasting change

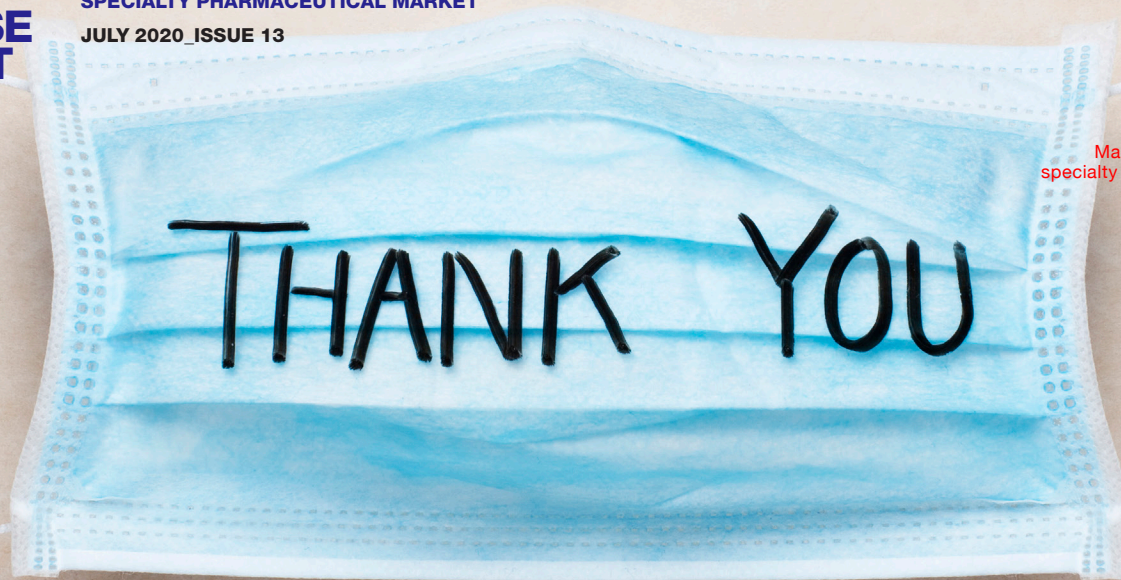
As the country opens up, the national conversation is shifting to the “new normal.” So what can we expect to change, possibly forever, in Canada's specialty medicine space?

A shift to virtual interactions, for one. With successful virtual interactions in their rear-view mirror, clinicians will continue the practice, reaching for digital tools to treat a range of medical conditions.¹⁵ Judging from a recent survey by the Canadian Medical Association, which found 91 percent of patients highly satisfied with remote care during the pandemic, patients will embrace the shift.¹⁶

The Covid crisis has also spurred the creation of worldwide data hubs,¹⁸ bringing to light the power of sharing knowledge. Insights gleaned from the data can help contain the spread of infectious disease, protect health workers, and accelerate the development of medical solutions.¹⁷ Researchers will not unlearn this lesson.

The pandemic is not over yet. Fortunately, specialty stakeholders have shown they can manage a historic crisis with extraordinary ingenuity and grace. As the Covid response strategy evolves over time, patients on specialty medications can rest assured they won't be left behind.

At this juncture, it seems fitting to thank all stakeholders in the specialty pharmaceutical sector – manufacturers, PSP providers, and front-line workers – for their Herculean efforts to date. Patients also deserve thanks for their strength and adaptability in these strange times. **Thank you all.**



Putting Patients First: How Seven Specialty Medicine Stakeholders Rose to the Covid Challenge

When the pandemic lockdowns rolled into Canada, they threatened to disrupt the specialty drug supply chain and put patients depending on these drugs in peril. Without missing a beat, these key players in the specialty drug world did what it took to avert this outcome.

Deep Caring: Bayshore Specialty Rx

When Bayshore learned that a government Covid testing site started operating next door to one of its infusion clinics, the specialty service provider, refusing to put its immunocompromised patients at risk, acted immediately to secure alternative clinic sites and relocate the patients. The company was also able to import enough PPE to supply not only its frontline staff, but all patients requiring treatment on a national basis.

Throughout the uncertainty and changing conditions due to the pandemic, Bayshore continued to meet the needs of each patient. In one case, a patient was too afraid of Covid to receive a home visit and injection from a nurse, even with both of them wearing the appropriate PPE. "The nurse parked her car in the driveway and trained the patient to self-inject from there," says Karl Frank, Divisional Director, Specialty Rx at Bayshore. All told, "Our staff have been heroic in their efforts to support patients during this challenging time."

Helping Patients Weather the Storm: BioScript Solutions

When the coronavirus pandemic rolled in, so did the feeling of apprehension amongst BioScript patients who were concerned about proceeding with their infusion and injection appointments. Recognizing the anxiety their patients were facing, the BioScript team put stringent protocols in place, from screening and sanitizing to limits on the number of patients in a clinic. This meant hiring extra nurses and increasing clinic operating hours – an extra cost that BioScript absorbed without hesitation. By the following month, "clinic appointments returned to our expected levels, and we continue to forecast a positive trend," says BioScript's Marc Grenier, Vice President, Operations.

BioScript also elevated its communications to patients and other external stakeholders with weekly status updates focusing on operational strategies. "From the onset of Covid-19, we have led with open, transparent operational communications to our partners as well as our patients, and that approach has been widely recognized and appreciated," says Chris Dalseg, Vice President, Strategic Growth and Marketing, who expects that "in the future, manufacturers and specialty partners will have more comprehensive conversations with regards to business continuity plans." →

CONTINUED FROM PAGE 3

Agility under pressure: McKesson Specialty Health

When the pandemic blew in, many patients began postponing their scheduled infusions at McKesson's INVIVA clinics: they were too scared. While their reaction made sense, patients needed treatment to maintain their health. Putting its trademark agility to the test, McKesson set up health screening protocols at the clinics, ramped up safety measures, and kept patients abreast of the changes through weekly updates. Thus reassured, patients returned to the clinics.

With job loss or interruption affecting their insurance benefits, many patients also had concerns about accessing and paying for their costly medications. "We told our patients not to worry, that we would retroactively manage the financial aspects for them," says Karen Chuk, Vice-President of McKesson Specialty Pharmacy Services. "We even managed to deliver medications to patients stuck outside the country," she adds. "Our overarching goal was to leave no patient behind."

Driving insights: Pentavere

Throughout the Covid crisis, Pentavere has intensified its quest to extract meaningful data from unstructured health information. The need for meaningful real-world data is now more important than ever. For example: What are the expected outcomes of a Covid infection in a female, aged 40 to 60, with type 2 diabetes and hypertension, to support that type of patient to better assess their own risk?

Strong data – and the insights it generates – is no less important in such therapeutic areas as oncology, which represents 60 percent of Pentavere's work. Lung cancer, for example, comes in several different subtypes, each one requiring a different treatment approach. "We need data and testing to get each patient on the right therapy," says Pentavere founder and CEO Aaron Leibtag. As an outcome of the pandemic, Leibtag expects that "industry, hospitals and prescribers will be more willing to collaborate to bridge our data gaps. Good data saves lives."

A step ahead: Sentrex Health Solutions

Sentrex lost no time in adapting to Covid. Anticipating the closure of hospital clinics, the company put an ingenious Plan B in place: outfit portable school rooms into temporary injection centres and "install" them into parking lots near hospitals. While the need for this strategy fell away, "we were ready for anything," says Sentrex partner Taflyn Hornibrook, who also heads Patient Programs and Stakeholder Relations.

Sentrex serves a large population of nursing-home residents receiving injected medications for vision disease, who faced a heartbreaking choice: go to the injection clinic and risk getting Covid, or delaying treatment and risk losing vision. Sentrex's solution? A "treatment bubble." Small groups of patients were bussed from nursing home to clinic, where they completed registration and injections in just a few minutes. "We eliminated all non-essential steps and kept the spaces sterile," says Hornibrook. "It gave patients the comfort level they needed."

Thinking big and removing barriers: Specialty Health Network

The Specialty Health Network (SHN), a division of Shoppers Drug Mart, expected the Covid crisis to drive up demand for home injection services – but not by 300 percent. SHN took the surge as an opportunity to step up. Within three weeks, the organization had set up Medeo, a virtual platform for patient consults, including online injection training. According to Shannon Bowie, SHN's Senior Director of Specialty Programs, "the service has been extraordinarily well received by our patients."

Meanwhile, hospitals constrained by Covid restrictions approached SHN for help navigating patients who no longer had a treatment home. Without missing a beat, SHN transitioned these patients to home nursing or to their virtual platform. SHN also worked with specialty drug manufacturers to streamline delivery of medications. To make this happen, "we had to work with regulators to minimize barriers," says Bowie. "It was a race against time, but it paid off."

Laser Focus: STI

When manufacturers asked STI for help managing the Covid pandemic, they all wanted the same thing: uninterrupted treatment for their patients. STI zeroed in on the most important hurdles and put mitigating supports in place – all within a week. For example, they replaced the physical cards used to get drug samples with e-cards and created a digital platform to distribute the cards. "Our tight focus is what made it possible," says Josée St. Martin, STI's Senior Director of Sales, Program Management & Analytics.

Acting on internal data showing that 70 percent of physicians planned to reduce their interactions with pharma reps,¹⁹ STI helped its clients create business continuity plans to absorb this change. The company also evolved its virtual capabilities to streamline communication between the different actors in the patient journey. "We're doing our part to bring the industry into the digital age," says St. Martin. "What hasn't changed is that the patient comes first."



Connecting the Dots Along the Supply Chain: Interview with Catherine Coles

As Bayer Canada's Director, Trade Relations & Strategic Partnerships, Catherine Coles manages Bayer's partnerships with key drug distributors, pharmacies, and hospitals, enabling patients to access their prescriptions at the right time and place. At the best of times, distributors must manage daily deliveries to over 11,000 sites, many of them in remote locations.²⁰ When the Covid-19 crisis created unpredictable deviations in pharmaceutical demand, Catherine's role took on new urgency. Behind the scenes, she worked tirelessly with her partners to ensure the specialty drug supply chain remained intact.

Catherine is also using her regulatory and compliance expertise to help manage product supply for the global Covid-19 clinical trial program launched by the Population Health Research Institute with support from Bayer Inc.¹³ With Canadian operations housed in Hamilton, Ontario, the program is evaluating the safety and efficacy of different combinations of drugs, including Bayer's rivaroxaban and interferon beta-1b.

Q: Tell us about the early days of the pandemic. How did things change in Trade Relations?

Remember the days when everyone was hoarding toilet paper? We realized the same thing could easily occur with pharmaceutical products. We couldn't let that happen, because patients with serious conditions, such as heart disease or cancer, can't go without their medications, not even for one dose. Anticipating large orders of certain medications, we put measures in place to ensure these drugs would reach all patients at the time of need. Because of this work, the shortages we might have experienced didn't materialize.

Q: Did you need to collaborate with stakeholders in new ways to ensure patients had access to their medications?

To ensure consistent distribution, we had to be quick on our feet and transparent. By the middle of March, our team was holding meetings with key players in the supply chain every other day, communicating our business continuity and response plan.

We had to marry the demands of stakeholders with federal and provincial regulations, such as the maximum prescription duration of 30 days across the country. We continuously evaluated our inventory to ensure we could meet changing demands. None of this would have been possible if we didn't already have strong relationships with stakeholders.

You can't wait until a crisis to establish good relationships. You have to build them from the ground up – brick by brick, as the saying goes.

Q: Bayer has a number of drugs for serious and rare diseases. Has the pandemic impacted access to these specialty medications?

Understandably, many oncology patients didn't want to risk exposure to Covid in infusion or injection clinics. This led physicians to re-evaluate their treatment plans and consider whether some patients could use oral medications for a time. Something similar happened in cardiology. New guidelines created during the →

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pandemic enabled some patients to begin treatment on oral medications without the usual intermediary step of injected or infused drugs. This meant patients could pick up their medications at the pharmacy rather than receive therapy at the clinic. We dialogued with pharmacies and specifically our patient support programs to ensure they had enough inventory to support such patients. In the ophthalmology space, our medications can't be taken at home, so we had to work closely with our partners to ensure continued supply as they spaced out clinic visits and stepped up safety protocols to minimize Covid risk.

Q: Tell us about your experience contributing to the research collaboration between Bayer and the Population Health Research Institute for the Covid-19 clinical trial program.

I manage product sourcing and distribution of materials to the research sites. Clinical trials have regulations around inventory stock, and I make sure we're complying. For example, you need to validate the products used in a trial and, as far as possible, use the same lot numbers. Interestingly, one of the most challenging issues was shipping product to a clinical trial site in times of Covid: coordinating receipt of product at sites with limited access, while working as quickly as possible to get product to a site so it could ultimately be delivered to patients.

One of the products used for the clinical trials is not available in Canada, so I had to arrange bringing this new brand into the country to the clinical trial site. This meant working with the global and local supply chain and with our regulatory team and Health Canada to determine quantities, timing, exportation, and importation. With all the regulations involved, this required mountains of collaboration. I was on the phone every day, sometimes late into the night because of time-zone differences. But we got the job done.

Q: How might the pandemic transform Canada's specialty pharmaceutical market?

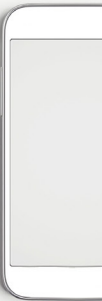
In general, health care is moving toward more virtual consults, which speed up access and are especially convenient for patients in remote locations. I expect we will help all HCPs support patients virtually; we will have to ensure we are providing the right tools for our PSPs to support more telecommunication or virtual communication with patients. The pandemic has proven it can be done, though there will always be a place for face-to-face interactions. I also anticipate a greater emphasis on oral medications, which do not require as many "in person" clinic visits.

Q: What role will Trade Relations have going forward?

The pandemic isn't over and we can't drop the ball. My main goal is to ensure timely, fair and reasonable distribution of all our products. This means patients in Northern Saskatchewan need to have the same access as those in downtown Toronto. We are also gathering data and will continue to collect data on the impact of the pandemic: what are the trends, where our patients are, who needs more or different drugs, and what types of PSP services are needed. This will help us serve our patients and distribute product throughout the pandemic and beyond.

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What We're Reading

We find that the following articles provide great insight into the specialty pharmaceuticals market. Follow us on [LinkedIn](#) where we're sharing our thoughts on these topics and many more.

[Surviving the COVID-19 Infodemic – Can You Trust Dr. Google?](#)

[What if there is no COVID-19 vaccine?](#)

[Data hubs in the fight against a global pandemic.](#)

[Brave new world of virtual health care](#)

[Virtual health care is having its moment. Rules will be needed.](#)

[COVID-19 Driving Unprecedented Drug Demand](#)

[Pharmacists are the other frontline health workers](#)

Upcoming Issues

In upcoming issues of *The 20Sense Report*, we'll take a deeper dive into:

- Patient perspectives on specialty pharmaceuticals
- Exploring opportunities for outcomes-based agreements
- Genetic-testing, specialty therapies and the growing complexity of specialty treatment

Is there an issue you'd like us to address? Do you have a question you'd like us to answer?

We welcome your suggestions for topics you'd like *The 20Sense Report* to cover.

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