

THE 20SENSE REPORT



Making sense of Canada's
specialty pharmaceuticals market

SPOTLIGHT ON THE CANADIAN
SPECIALTY PHARMACEUTICAL MARKET

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Oncology medications just got simpler... or did they?

The names of many new oncology drugs may trip a few tongues – Tagrisso, Xalcori, Mekinist, and Ninlaro come to mind – but the drugs themselves are a lot simpler than their predecessors, for one important reason: they are taken orally.

Currently available oral oncology medications cover a range of indications, from multiple myeloma and metastatic melanoma to castration-resistant prostate cancer and small-cell lung cancer. There's even an oral medication for graft-versus-host disease, a potentially life-threatening complication of stem cell transplant treatment. In the study that led to approval of the medication (Imbruvica, Janssen Inc.), 67% of patients had a complete or partial response to the drug.¹ A clinical trial of the drug has also given legendary hockey player Paul Henderson a new lease on life² – a testament to the life-changing potential of these medicines.

The last few years have seen an explosion in this pharmaceutical niche, and the trend continues to burn hot: based on

recent figures from Cancer Action Canada, 51% of oncology indications – that would be 190 molecule/disease combinations – in the pipeline involve oral medications.³ Head and neck, gastrointestinal, genitourinary... it seems there will soon be an oral medication for every type of cancer. Best of all, some of these agents can target specific cancer genes, meaning they have the potential to choke off the carcinogenic process at its source – what researchers call precision medicine – and significantly prolong survival.

These innovations could not come at a better time, given the rising prevalence of cancer in our aging population. As it stands, about half of all Canadians will develop cancer in their lifetimes, and 60% of these individuals will live at least five years beyond their diagnosis.⁴ For these long-term survivors, cancer takes on the character of a chronic disease.

It goes without saying that the oral route makes patients' lives immeasurably simpler. Instead of going to hospitals or clinics for treatment, they can take the medications

at home. No scheduling challenges, risk of injection site reactions, or lengthy waits during infusions. This means patients can lead a more normal lifestyle and, perhaps more important, *feel* more normal.

The convenience of pills comes with some downsides, though: without scheduled treatments, patients may fail to take their medications as prescribed – and thus raise the risk of relapse.^{5,6} Some patients may also perceive pills as less potent than infused medications, which could further impact adherence. The shift to oral treatments also puts the onus on patients to access their treatments at community pharmacies or via home delivery from specialty pharmacies, presenting a variety of distribution challenges – and opportunities – for manufacturers.

That's why patient support programs (PSPs) and targeted distribution strategies are no less important for oral cancer treatments than for their infused counterparts. As the saying goes, the devil is in the details – which we explore in the next two articles.



The Evolution of Oncology

THERAPY TYPE

75%

OF PATIENTS ARE TREATED WITH ORAL THERAPIES

CHANNEL

SPECIALTY AND RETAIL PHARMACIES DISPENSE

> 50%

OF ORAL THERAPY PRESCRIPTIONS

PATIENT SURVIVAL RATE

60%

OF PATIENTS WILL SURVIVE AT LEAST 5 YEARS AFTER DIAGNOSIS

FUTURE PIPELINE

190

NEW ORAL INDICATIONS/
MOLECULES ANTICIPATED
(51% OF ONCOLOGY PIPELINE)

New Game, New Moves

The shift to oral oncology medication blasts open the door to innovation in marketing, distribution, and patient care. With infused medications, manufacturers focus on ensuring the medication reaches the infusion sites (typically hospitals), while the sites handle scheduling and monitoring services. With oral medications, pharmacists take on a new role in distribution, and patient adherence presents new challenges that manufacturers must address.

Oral medications also reslice the financial pie: while hospital budgets and the public sphere cover the cost of in-hospital infused and dispensed drugs, both public and private payers now share responsibility for oral medications. These drugs don't come cheap – monthly costs typically run into the thousands, with a single pill often topping \$200. This means marketers need to focus more attention on the private payer landscape to ensure the broadest mix of coverage. Patients, in turn, often require support securing that coverage. If a patient accidentally drops a pill down the sink, the stakes rise still further.

Forward-thinking manufacturers are tackling these challenges through innovative specialty programs. Take the YOU&I program⁷ for Janssen's Imbruvica, for example. The program takes patient support up several notches by helping patients organize their schedules and manage their finances. Putting the icing on the cake, YOU&I also supports caregivers through their journeys. In 2016, the Ontario Pharmaceutical Marketing Association recognized the program with a Skuy award in the Patient-Centric Programs category.

Astellas Pharma Canada, for its part, bagged a Skuy award last year⁸ for an awareness-raising campaign related to its oral medication for prostate cancer, Xtandi. Called Pucks4Prostate, the Nov. 2017 campaign had Astellas donating \$5 (to a maximum of \$50,000) to Movember Canada for each selfie hash-tagged with #pucks4prostate – moustaches optional.⁹

As it turns out, even distribution channels can impact patient behaviour. In a retrospective study of over 11,000 patients receiving oral cancer medications, adherence and persistence rose significantly in patients who accessed their drugs through specialty pharmacies.¹⁰ At the same time, an intelligently designed retail pharmacy approach makes the most sense in some contexts.

With all these considerations to juggle, oral oncology manufacturers need to think carefully and creatively about how to invest their marketing dollars to have the largest impact where it counts the most: with patients.



Up close with Takeda's Mark Degen

There's no better way to gain business insight than to pick an expert brain. With this in mind, 20Sense sat down with Mark Degen, Oncology Business Unit Head at Takeda Canada Inc., who shared his thoughts about marketing oral oncology treatments such as the company's own NINLARO®.

For starters, tell us a bit about NINLARO®.

In 2016, Health Canada approved NINLARO® as the first and only oral proteasome inhibitor indicated (in combination with other medications) for selected adults with multiple myeloma – a relapsing and incurable cancer that causes great pain and distress. NINLARO®'s once-weekly oral dosing can help patients and their caregivers save precious time, money and energy.

In terms of funding and delivery of care, is it “business as usual” with oral oncology medications?

Not quite. A number of national cancer organizations, including CanCertainty and the Canadian Cancer Society, are calling for changes in how the provinces fund and manage cancer drugs that can be taken at home. As I see it, patient support programs (PSPs) are an important part of this ecosystem as they complement the services provided in cancer treatment centres.

How do PSPs for oral oncology medications differ from PSPs for infused or injected oncology medications?

With oral medications, patients need to follow treatment instructions on their own, and PSPs can help them meet this challenge. For example, Takeda's YOURVANTAGE™ PSP gives NINLARO® patients access to an oncology-experienced nurse, support with medication delivery, and – most important – support with adherence to treatment.

How are private insurers responding to the growing presence of oral oncology meds, and can PSPs help smooth out some of the bumps?

With the growth of oral cancer medications, more and more patients can continue working while getting treatment. While this is great news for employers, funding and access to medications can present challenges. A good PSP can help patients navigate their reimbursement options and get medication into their hands as quickly as possible.

What marketing and distribution strategies might best serve manufacturers of oral oncology medications?

In terms of distribution, the ideal is to both respect the patient's choice of pharmacy and to enable distribution through the pharmacy at the cancer treatment centre, where patients can receive pharmacy counselling from a team that understands the “whole picture.” From a marketing perspective, data collection and analysis – with appropriate consent, of course – can generate real-world evidence and data to improve operations and service delivery.

Any tips for a marketer launching an oral oncology medication for the first time?

1. Always **keep the patient at the centre** of your operations, including your PSP, with the aim of eliminating medication delivery delays.
2. Ensure your PSP has the capacity to **deliver optimal services** such as medication inventory, which helps create a positive experience for all stakeholders and strengthen the brand.
3. As far as possible, design your program so it **complements** (rather than duplicates) **the patient experience** at the cancer centre and **aligns with key public-access milestones**.

Playing to Win

Over the past several years, 20Sense has been monitoring the evolution of oral oncology medication market. Having taken stock on what works, and what doesn't, we offer a few pearls to keep you on course.

Know – and reach – your influencers. Who is “touching” your oral oncology medication? In addition to doctors, consider that pharmacists, support program coordinators, and possibly ancillary professionals such as home care nurses will have a hand in the flow of your product. And don't forget patients themselves. Oral medications give them a lot more power in making decisions. Your marketing plan needs to reach all these stakeholders – and make life as easy for them as possible.

Support patients through the experience. Patient support programs can ensure your patients get full value from treatment. For example, lack of standardized processes for self-administering oral cancer treatment can compromise safety,¹¹ and your program could help bridge this gap. You don't need to go it alone – consider working with pharmacies to deliver services such as monitoring adherence, tolerability and side-effects.

Keep your finger on the value. Gone are the days when a tablet, pill or capsule meant low cost. Invest the time to understand the barriers that may arise from having higher-priced oral drugs and the best ways to convey value. How can your support program help get the drug into patients' hands? Will patients feel comfortable handling a \$10K bottle of pills? Fully explore the approaches at your disposal.

Use the right channels. If your comfort zone lies in hospital distribution, you now need to change channels – to figure out the best mix of pharmacies (specialty, hospital, and retail) to dispense your product. Resources such as the 2017 pan-Canadian consensus guideline on safe use and handling of oral anti-cancer drugs in community practice¹² can help you create distribution channels that preserve the integrity of your product.

Cancer has always been a big deal for patients, and oral medications don't change this fact. The right supports and strategies can help your patients through their difficult journey and elevate your product to its full potential.

¹ Janssen Imbruvica news release, Oct. 30, 2017. https://www.janssen.com/canada/sites/www_janssen_com_canada/files/imbruvica_cgvhhd_news_release_-_final_eng.pdf
² *Globe and Mail*, Dec. 3, 2014: <https://www.theglobeandmail.com/sports/hockey/paul-henderson-says-cancer-treatment-is-a-game-changer/article21941135/>
³ CADTH cancer drug pipeline information. <http://www.ccanceraction.ca/wp-content/uploads/2017/04/HTA-Pipeline-April-3-2017-PDF-1.pdf>
⁴ Canadian Cancer Society 2017. <http://www.cancer.ca/en/cancer-information/cancer-101/cancer-statistics-at-a-glance/?region=on>
⁵ Jabbour EJ et al. Patient adherence to tyrosine kinase inhibitor therapy in chronic myeloid leukemia. *Am J Hematol* 2012; 87:687–691.
⁶ Ruddy K et al. Patient adherence and persistence with oral anticancer treatment. *CA: A Cancer Journal for Clinicians* 2009; 59:55-56
⁷ Imbruvica (Canada) YOU&I program. <https://www.janssenpro.ca/medication/imbruvica/campaign/you-and-i-bioadvance-program>
⁸ OMPA 2017 Skuy award recipients. http://www.theopmaonline.org/skuyawards/images/pdfs/Skuy_Awards_Winners_2017_v3b.pdf
⁹ Astellas news release, Nov. 1, 2017. https://astellascanadapdfs.blob.core.windows.net/english/EPR%20-%20P4P%20Launch%20Release_final_EN.pdf
¹⁰ Stokes M et al. Impact of pharmacy channel on adherence to oral oncolytics. *BMC Health Serv Res* 2017; 17:414.
¹¹ CAPCA. Oral cancer therapy. <http://www.capca.ca/current-issues/oral-cancer-drug-therapy>
¹² CAPCA/Cancer Care Ontario. Pan-Canadian consensus guidelines. http://www.capca.ca/wp-content/uploads/FINAL_SHOCCGuideline_ENG_Logos.pdf



Want to play a more strategic game? We're here to help.

If you're launching a new oral oncology medication, or want to take your existing product up a notch, 20Sense can help. Get in touch with us to learn more about:

- Efficient and effective patient support
- Distribution to specialty, retail and hospital pharmacies
- Tightening your supply chain

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.

[Canada-wide program aims to get young cancer patients faster access to new therapies](#)

[Ground-breaking report looks at Canadian cancer care exclusively from the patient perspective](#)

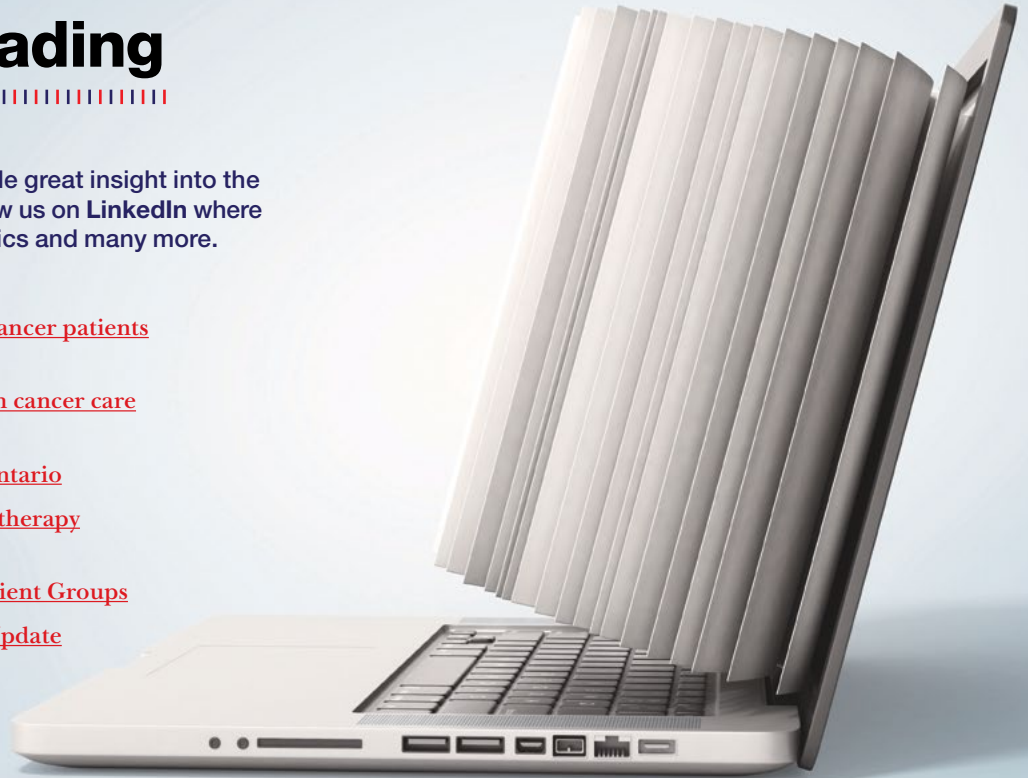
[Paying for Take Home Cancer Drugs in Ontario](#)

[Program will make costly melanoma drug therapy available in Ontario](#)

[Cancer Drug Pipeline Information for Patient Groups](#)

[CADTH Cancer Drug Pipeline Tracking Update](#)

[Improving Access to Innovative Cancer Therapies in Canada](#)



Upcoming Issues

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

- Opportunities and challenges for biosimilars in Canada
- Specialty pharmaceuticals and data, key areas for insight maximization
- The patient perspective on specialty pharmaceuticals

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.

Are you looking to make better sense of the specialty pharmaceuticals market?

Contact us at:

[LinkedIn](#)

20Sense helps pharmaceutical manufacturers and specialty service providers more effectively enter and compete in Canada's complex specialty pharmaceuticals market by optimizing data, insights and programs that deliver better outcomes for patients and value for payers.

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