

# Fighting for Medication Access and Adherence

Market Outlook Beyond 2022



The battle for medication access and adherence is being fought on many fronts. The rise in the number of specialty medications brings with it more complexity and more red tape. Technology and the digital landscape edge towards ubiquity within the healthcare industry with each passing year. The growing importance of the patient support space, and its impact on access and adherence, feels exponential.

Today's prescription medication landscape is reactive to this dramatic increase in specialty medications and the facts indicate these are the market conditions that anyone developing support to patients, providers and/or pharmacists need to plan for in the long term.

more than

**80%**

of prescribers report an increase in PA requirements over the last 5 years

nearly

**60%**

of total spending in developed markets is expected to be driven by specialty drugs through 2025

Plus, digital communication tools are evolving because solution providers are attempting to manage high-touch specialty prescription journeys that offer guiding administrative attention and helpful exchanges of clinical, educational, and affordability information between providers and patients.

These trends have been unfolding for years. Now, as we cautiously move from pandemic towards the new normal of an endemic, both COVID and the naturally-evolving prescription landscape continue to test and transform our healthcare system.



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The importance of a positive patient experience has never been more critical. According to **Bain & Company's** recent global survey, a customer-centric approach that supports physicians and their patients in workflow will be key for pharma. Data- and analytics-based platforms that can deliver “the right messages to the right customers at the right time” help build brand loyalty and win market share.

In this report, we examine the current healthcare landscape and highlight five trends that are indicative of how market changes over the past two years have impacted providers, patients, and brands.

## **And we ask two questions:**

- 1. What does the healthcare market need to best connect patients with critical medications in a frictionless way?**
- 2. What tools and tactics are forward-looking pharma companies using to bridge the gap between patients, providers, and specialty medications?**

# Hub services take the pain out of prior authorizations

With the dramatic rise in prescriptions for specialty medications, the prior authorization (PA) process has grown in complexity. Heavy clinical requirements, competition around less expensive biosimilars, and clinical documentation requirements lead to a lengthy and often-challenging approval process for providers and patients alike. From the provider perspective, 93% of physicians surveyed by the **American Medical Association** say the PA process results in care delays at least some of the time.

While the pandemic itself hasn't necessarily exacerbated the issue, pandemic fatigue has. Specifically, staffing shortages have led to backlogs in gathering and submitting necessary PA requirements for both medical and pharmacy benefits, putting additional pressure on already stressed medical office teams. Those providers' offices who do not have, or worse, do not know about, a hub that supports the electronic Prior Authorization (ePA) process and other patient support services, are being stretched thinner than is necessary. More medications require a PA than ever before, and providers need to be aware that a hub that will facilitate this process in workflow exists and is accessible to them.

Increasingly, providers are turning to hubs and ePA to combat this fatigue and, more importantly, to help speed the approval process for both pharmacy and medical benefits. With ePA, providers and their staff no longer need to spend time on the phone or worry about using outdated forms, since current forms are provided on demand. Status updates are provided in real time so there are no questions about where a medication is in the approval process.

While some providers have been slow to embrace this technology, the shift is underway. The first step, of course, is increasing awareness that the technology exists. Forward-thinking brands should be investing in awareness campaigns and improving hub and ePA technology if they haven't already.

We know that providers and their staff are embracing hubs to ease medication access to patients, but this only applies to those who are aware of hubs and have access to them.

Consider the following:

- 83%** | agree hubs help patients get on therapy
- 85%** | are happy with the hub they are using
- 58%** | value copay programs and ePA capabilities the most

However...

- 18%** | have never heard of hubs
- 31%** | have heard of hubs but have never used them
- 20%** | don't understand hubs' exact role

Providers who do not use hubs have identified the features they would use if hubs were an option for them, leaving the door open for brands to fill unmet needs:

- 39%** | want prior authorization support
- 34%** | want patient copay program access
- 28%** | want benefit verification and prior authorization appeal support<sup>1</sup>

<sup>1</sup>ConnectiveRx, Hub access and reimbursement research April 29 – May 28, 2019. n = 284 medical office staff

Q: Recognizing all brands are different, please rate your overall satisfaction with the hub used most often.

Q: Given this definition, what has been your exposure to "hubs" as part of your work?

Q: Excluding the hub-related items selected as most valuable, which of the following would make you use or increase your use of hubs / may make you start using hubs, assuming they were available to you? Please select up to 3 items only. Note: "Other" not displayed

# Now is the time to flex with your digital toolbox

According to a recent survey of over 1,000 physicians by the Prescribers' Digital Reference (PDR), more than half of respondents (55%) are not permitting rep visits, either because of institutional policy or personal choice. Data further suggests that virtual visits will continue to gain momentum, and many physicians are embracing this change. In-person detailing is now at approximately 52% of the norm/pre-pandemic levels. While the pandemic meant no rep visits, offices are now slowly letting them back—but only at 52-60% capacity, with some specialists being more generous with their face-to-face meetings.<sup>2</sup>

Pharma brands should be striving to reach HCPs in their existing EHR workflow. HCPs need support from brands that will directly address patients' challenges during both in-person and telehealth visits. Doing this serves three purposes:

1. Makes HCPs easily aware of hubs and other patient assistance programs with less administrative work
2. Supports an open conversation between HCPs and patients about a patient's ability to afford their medication

3. Gives brands valuable data to help determine their visibility in the market

Physicians have embraced EHR systems for their ability to enable e-prescribing, medication refills, ordering labs, and getting test results delivered directly within the EHR versus having to hunt them down. Engaging physicians through the EHR increases brand awareness, highlights medication pricing information, and drives the delivery of patient savings offers.

But it's not just physicians who are embracing technology. Patients have become more comfortable seeking out their own information to manage their conditions. While this represents a mostly positive development for patients and physicians alike, it does leave patients vulnerable to misinformation. Providers therefore need reliable in-EHR messaging to share with patients that provides accurate clinical insights, dosing requirements, and out-of-pocket pricing. Allowing the provider to be a credible source of truth not only protects the patient from misinformation, but also allows brands to drive awareness via the EHR and easily measure ROI.

"Drugs don't work in patients who don't take them." It would seem that pharma manufacturers are adopting this mantra by increasing their spending on patient and physician awareness tactics.

According to a survey of pharmaceutical manufacturers, they are most likely to report budget increases for digital marketing outreach and patient engagement.<sup>3</sup>

**Brand managers should stand up and take notice as their competitors are taking action by increasing spending to gain and keep brand loyalty.**

## Competitive growth in digital awareness tool spend



<sup>2</sup>ConnectiveRx, COVID-19 Impact on Prescribing and Rx Affordability, Sep. 2021. n = 1,049 prescribers

<sup>3</sup>CBI and Informa Engage on behalf of ConnectiveRx.

Q: In what areas will you increase your marketing budget in 2022? (Select all that apply.)

# Pharmacists – the public’s most accessible healthcare provider

With patients precluded from visiting physicians’ offices for an extended period, pharmacists became even more important stakeholders, resulting in increasing patient reliance at that site of care. This represents a significant shift, because so many expectations around patient communications, education, and awareness of patient support programs, especially for specialty medications, used to fall almost exclusively on doctors.

According to a recent major **survey** of patients, pharmacists and providers conducted by Columbia’s Mailman School of Public Health, pharmacists are well-trusted by patients and are expected to play an increasingly integral role in direct patient care responsibilities vs. transactional care. Patients’ eyes have been opened to the value pharmacists can provide, creating a level of trust that can ultimately lead to better compliance and adherence. And by giving pharmacists tools that guide them to share product information with patients, brands continue to enable pharmacists’ increased role as educators.

Because pharmacists have been overworked for so many months, the ability for brands to quickly

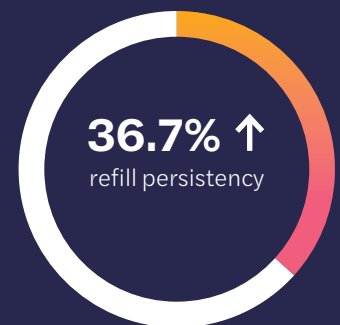
provide affordability program information to them digitally in their existing workflow has never been more important. These programs, as well as the in-workflow tools pharmacists use, gave prescribers and pharmacies the ability to use copay cards to get prescriptions covered and help ensure patients weren’t suffering without their medication.

There is also an opportunity for brands to examine how they are setting up their pharmacy networks, including in more rural areas where patients’ physical access to a pharmacy may be limited, to make mail and courier options available.

Now that patients are embracing the convenience of these various delivery options that became popular during the pandemic, we’re likely to see a combination of patient pick-up and delivery into the future. And while telehealth pushed many patients out of their comfort zones, they became increasingly agreeable to having their prescriptions sent to the pharmacy electronically, leading to fewer misfills and errors.

Communicating patient support programs in the pharmacist workflow has the potential for better patient adherence and stronger brand ROI.  
**How do we know?**

In a recent 6-month trial in which pharma brands provided clinical and patient savings messaging to pharmacists, brands recorded a 23.75% lift compared to the control group.<sup>4</sup> In another 6-month trial, brands witnessed an increase in refill persistency of 36.7% over control.<sup>5</sup>



<sup>4</sup>CRx Diabetes Patient compliance program, 6-month measurement, analysis period: 12/10/20 – 6/30/21  
<sup>5</sup>CRx COPD Patient compliance program, 6-month measurement, analysis period: 12/10/20 – 6/30/21



## Affordability programs integrated with hubs put medications into patients' hands

We have already noted that including patient assistance information within workflow is critical for both the physician and patient, but there is a major benefit to the brand as well. Hubs that integrate copay programs provide critical insights by which the specialty brand can measure its level of success.

Once a patient opts into a copay program, all transactions are captured and measured within the hub, giving brands key insights into the effectiveness of their program and how it impacts the patient journey. And, since the patient journey is also reported in the hub's HCP portal, providers can see how well the product is supported, helping them feel confident that administrative burdens will be reduced.

With out-of-pocket costs rising every year, patient assistance programs have become more generous, and the pandemic helped to fuel

this generosity. In addition, patient assistance channels have improved dramatically over the past two years.

These factors have made an impact on all players in the patient journey. Physicians are able to include copay program information with the eRx at the point of prescribing, pharmacists have the tools to find coupons for patients, and patients themselves are seeking them out more than ever before. These are critical in-workflow opportunities because they allow patients to know ahead of time what their medication will cost, and brands are able to measure script lift and ROI on their patient savings programs.

# Innovative reimbursement strategies will always be critical to patient support

On May 17, 2022, a federal judge **struck down the CMS Best Price Rule** that was finalized in December 2020. Had the Rule gone into effect as scheduled in January 2023, it would have placed an increased financial burden on patients, many of whom already deal with reimbursement challenges when filling their prescriptions.

While this decision is a victory for patients, brand managers will still need to work to get affordable medications into patients' hands. The truth is that roadblocks to affordable medications are not going away. Two of those obstacles, accumulator and maximizer programs, place undue burdens on patients by keeping the patient in their deductible period for longer.

Importantly, accumulator adjustment programs reached **43% of covered lives in 2021**, up from 28% in 2018. Perhaps even more concerning is the fact that 38% of covered lives could have been impacted by an accumulator that is available in their plan, but had not been implemented in 2021. That number was only 16% in 2018, and the fact that so many more patients could suddenly find themselves impacted is unsettling.

Meanwhile, maximizer program adoption outpaced accumulators for the first-time last year. Although less burdensome to patients than accumulators, both programs highlight the clear need for manufacturers to reexamine their reimbursement strategies.

As with many other challenges in the healthcare industry, manufacturers are leveraging data to better navigate the impact of accumulators and maximizers on their patients. Smartly designed affordability programs, backed by data that measures the impact on patients and the brand's ROI, are essential to helping patients navigate their journey and access affordable specialty medications.

Broad reimbursement strategies that can leverage a variety of channels will be best positioned for success. Data that shows the use of these programs helps brands understand where they are succeeding, and where adjustments need to be made. It's a win-win for brands and patients alike.





# The More Things Change, the More They Stay the Same

Despite significant shifts in how care is being delivered, the focus must continue to be on patients and the healthcare professionals that support them. For pharma manufacturers, this means that the tactics to achieve the goal of a patient-centric approach to healthcare should combine technology, data, clear communication, and creativity. These efforts, which forward-looking companies are already using, are bridging the gap between patients, providers, and specialty medications in a frictionless way and are positioning brands for success in an ever-changing landscape.

To learn how you can partner with ConnectiveRx, visit [ConnectiveRx.com/connect](https://ConnectiveRx.com/connect)



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# We don't change the system. **We change the system experience.**

At ConnectiveRx we take the pain out of the prescription process. We don't treat patients and we don't make the medications that do. We use both innovation and human empathy to cut through mountains of red tape and create access to specialty medications for patients who have chronic disease—taking a process that can be expensive and difficult and making it as painless as possible. As one single partner, we connect patients with prescribed medications through hub services, affordability, awareness, and adherence solutions. The result? Happier patients who have a stronger connection to their medication brand. We've done this for hundreds of pharma companies and more than 530 drug brands. Let us facilitate great patient-to-drug experiences that make you shine.

**Learn more at [ConnectiveRx.com](https://ConnectiveRx.com)**

