

THE EFFECT OF COVID-19 ON THE HEALTHCARE MARKET ACCESS LANDSCAPE



No one needs reminding that the COVID-19 pandemic is the most dramatic global event since at least 9/11/2001. But none of us really know what it means for healthcare provision, product approvals and the role of pharma as we move into the post-COVID era.

To explore these issues, in late 2020 the Blueprint Partnership team undertook a self-funded study where we discussed these questions with 14 national and regional payers (6 US, 8 EU5). The results raise interesting questions about our industry in the future.

The immediate impact of COVID-19 on healthcare systems

Most of us can probably name the key developments:

- Redeployment of staff to urgent frontline roles
- A major decline in elective surgery
- The shift to telemedicine consultations
- Oncology services have been hit hard

More subtle changes of interest to pharma have been seen too including:

- Formulary approvals have been substantially delayed
- Patient recruitment for clinical trials has slowed considerably
- Long-term health inequalities based on age, income and ethnicity have been exacerbated

Challenges for Pharma



How will pharma choose to set prices for new products if funding is even tighter than in the past?



How well, and how quickly, can we come up with more convincing health economic arguments in support of these products?

Then, looking more broadly at provider changes, how can we maintain effective contact with customers who are likely to be more time-challenged as they deal with the patient backlog, and increasingly comfortable with remote interactions? And is an industry which has become slower and more procedural over the last couple of decades best equipped to respond to a very rapidly changing and tougher business environment?

Importantly, where does business intelligence fit with this?

Whatever happens, it's clear that we face the famous curse of *living in interesting times*.

It does seem likely, however, that for our industry, and our sector, any prize to be taken from these times will go to those fleet-footed folk who can respond most effectively to rapid change.

To hear more please reach out to Carolyn Chamberlain
 Carolyn Chamberlain | c.chamberlain@blueprintpartnership.com | + 44(0)7514 493660