

55th AESGP ANNUAL MEETING

Evolving the self-care environment

4 - 6 June 2019 Geneva



Conference Report

The 55th AESGP Annual Meeting – the annual gathering of the self-care sector in Europe – was held in Geneva, Switzerland, from 4 to 6 June 2019. The conference entitled 'Evolving the self-care environment' looked at the numerous challenges facing the self-care environment such as increasing societal concerns and fragmented regulatory landscape while offering ideas as to how to turn these into opportunities by building consumer trust, making self-care as the default option through nudging, fostering socially conscious and transparent brands and most importantly putting individuals at the centre.

Self-Care for Health

The opening session started off with the AESGP video on self-care, which reminded that individuals practise self-care every day and everywhere, often unconsciously. The video was introduced by **Jurate Švarcaitė**, AESGP Director General, who presented the revised AESGP mission to advance responsible self-care, by enabling individuals to take better care of their health needs while at the same time contributing to the sustainability of European healthcare system.

Current and forthcoming challenges to the European healthcare system were outlined by **Guillaume Dedet**, Health Economist and Policy Analyst at the Organisation for Economic Co-operation and Development (OECD). Sharing the highlights from the 'Health at a Glance: Europe 2018' report – one of the key outcomes of the European Commission's 'State of Health in the EU Cycle' two-year initiative – he outlined the main risk factors affecting the European population which contribute to the prevalence of non-communicable diseases. He further provided telling figures on healthcare expenditure in Member States and pointed to the issue of wasteful spending on health, including for example over the prescription of antibiotics.

Michał Byliniak, PGEU President, reiterated the importance of self-

care for pharmacists and community pharmacies. The role of pharmacists is changing and the focus of pharmacy practice is shifting from product to service provision. Therefore, pharmacists are assuming an even more prominent role in healthcare systems and establish themselves as primary care providers, offering a wide array of service to individuals. Self-care is seen by pharmacists as an essential part of practice and can serve as a distinct value-added service, providing ease of access to treatments and promoting patient empowerment.



From left to right: Guillaume Dedet and Michał Byliniak

The changing environment offers a greater role for self-care in health systems, and a greater availability of non-prescription medicines to treat more conditions should therefore be encouraged, with pharmacists serving as facilitators.

All the panellists agreed that individual empowerment to embrace self-care remains of great importance and that more should be done in promoting health literacy and providing individuals with the right skills in order to ensure an effective and responsible self-care. In that

regard, digital tools hold a significant potential to support and guide individuals to practise responsible self-care. Individual empowerment was noted as a key message which the self-care industry should communicate to stakeholders with regard to the value of self-care in addition to its economic impact. In view of this, AESGP aims to continue in delivering its mission to advance self-care by generating more data on the value of self-care as well as promoting various initiatives on health literacy and education undertaken by its members.

How to Respond to Societal Concerns?



From left to right: Maud Perrudin, Robert Madelin, Victor Geus and Caroline Frery

Societal concerns understood as hazards such as climate change, safety of chemical substances, etc. with the capability to generate socio-political responses, have been discussed by the panellists during the second session of the conference. These concerns stem from a waning trust in governments and institutions, which impacts governance in multiple ways, even resulting in mishandling of the issues.

Maud Perrudin, AESGP Deputy Director General, opened the session, pointing out some of the recent examples of societal concerns and potential challenges which could arise due to the political shift following the recent elections to the European Parliament.

Robert Madelin, Chairman of Fipra International Ltd, gave an introduction to the concept of risk from a society and regulatory perspective and illustrated an impact of different risk management strategies across sectors. Societal concerns can be seen as an opportunity but there is a need to rethink how to manage them. Much can be achieved through better risk framing, appropriate risk communication, greater risk literacy, increased transparency and better governance, which should involve everyone, even the more challenging interlocutors.

Victor Geus, GSK DACH General Manager, provided his company's experience in the management of societal challenges and promoting responsible as well as environmentally sustainable self-care. Companies often face numerous barriers which often discourage them from taking action; the best approach is to start small and locally. He gave an example of packaging and said that safe and secure packaging is not enough for today's consumer. It should also be sustainable and, when aiming for that, GSK was looking at the supply chain as a whole and implementing necessary changes.

A new model of sustainable packaging by design was presented by **Caroline Frery**, VP Global Business Development at TerraCycle. The company's mission was to eliminate waste by recycling the 'non-recyclable'. She gave a number of examples showing how TerraCycle, in collaboration with manufacturers, reused, upcycled and recycled waste – including packaging waste – and therefore moved waste from a linear system to a circular one. Their recent programme "Loop", available in NY and Paris, is an online shopping service based on refillable containers. Empty product containers are collected, cleaned and refilled for reuse.

The key message of the session was that companies that establish themselves as being more than just their

products resonate better with individuals and have greater trust. The self-care industry can build on its existing relationship with consumers, further promoting their empowerment and acknowledging their expectations. Greater focus on sustainability should become part of the strategy for the self-care sector, following

the example of other industries already committed to circular economy. The current political momentum should be used as an opportunity to frame the regulatory landscape, going beyond established practices and especially focusing on soft law.

'Nudging' for Self-Care

Nudging offers policymakers an effective way to influence citizens' behaviour without further restricting their freedom of choice, imposing mandatory obligations or introducing new taxations or tax relief. It has been increasingly used by governments including the European Commission which launched the new Competence Centre on Behavioural Insights on 5 June. The session looked at how nudging is applied to healthcare policies, especially self-care, and what could still be done.

Tiina Likki, Principal Advisor at The Behavioural Insights Team, started the session by defining nudging and laying out the behavioural science behind it. She further shared the Behavioural Insights Team's work in partnership with governments, local authorities and businesses, often using simple changes (nudges) to tackle major policy problems with particular focus on public health. She stated that some ideas of nudging can often seem as an obvious choice; however, not all of them would deliver the desired changes and therefore it was important to measure the impact of those to be sure they are effective.

Laurent Faracci, RB Health's Executive Vice President, Global Category, shared RB's purpose-led strategy in guiding responsible self-care and 'nudge' consumers to make healthier choices. He explained why RB, based on its brands portfolio, is in a privileged position to nudge consumers towards healthier and safer choices throughout their daily lives. He shared global examples of their



From left to right: Tiina Likki, Laurent Faracci and Cathy Smith (moderator)

ongoing efforts to support consumers all around the world.

The panellists agreed that behavioural insights and nudging could be further used to promote health literacy and responsible use of OTC by designing environments where self-care choices are seen as the default option. These could at the same time contribute to consumer empowerment and help build confidence on the side of regulators regarding responsible use of self-care.

Future Trends in Self-Care

The fourth session presented the Global Self-Care Federation (GSCF, formerly WSMI) initiative 'The Future of Self-Care' to which AESGP contributed last year. The initiative delivered a strategic analysis of current and potential future trends in self-care at a global level, noting in particular that the external environment is evolving rapidly. The panel discussion moderated by **Judy Stenmark**, GSCF Director General, brought together views from across the global membership of the GSCF. **Jen Del Carlo**, Consulting, Monitor Deloitte, first provid-

ed the findings from the landscaping study conducted by Monitor Deloitte, identifying the key trends and key uncertainties of the evolving environment.

The panellists – **Alan Main**, WSMI Chair and Executive Vice President of Consumer Healthcare at Sanofi, **Jurate Švarcaitė**, AESGP Director General, **Scott Melville**, President and CEO of the Consumer Healthcare Products Association (CHPA) and **Tatsuo Kurokawa**, President of the Japan Self-Medication Industry (JSMI) – discussed

the opportunities and challenges the industry is facing globally and in their respective regions.

The panel discussion focused on the three key objectives of the GSCF: (1) enhancing trust across the self-care industry on the issues that matter most to the stakeholders, including through the ongoing improvement of transparency, (2) embedding self-care as a universal building block of sustainable health, for individuals and for the system, and (3) actively engaging in the debate on the regulation and use of health data to enable the full value of self-care and self-care solutions. The GSCF in that regard aspires to be a recognised and trusted source of information on self-care globally supporting its member associations and companies through this purpose.



From left to right: Jen Del Carlo, Alan Main, Judy Stenmark (moderator), Tatsuo Kurokawa, Jurate Švarcaitė and Scott Melville

Brands and Public Health

Brands are essential to the self-care industry and the promotion of self-care. The value of brands is recognised across Europe; the legislation provides manufacturers with the possibility of applying for trademarks to protect their brands with the objective to encourage and reward investment in innovation, the manufacture of high-quality products, their effective distribution and the promotion of their benefits. The use of brands is of significant value to the consumer as they allow them to make better and informed choices, which further results in a strong interest from the manufacturers' side in preserving consumers' confidence in a product and, consequently, maintaining a high level of quality.

that the environment has changed and that it has become much more challenging to build and maintain trust. Discussing evolving consumer expectations, he added that individuals today expect companies to have a purpose, which can be a challenge for companies as they tend to be much more reactive than strategic. Companies should reassess what matters to them as well as what matters to their customers and through that build a culture of purpose.

In her presentation, **Michelle Gibbons**, Director General of AIM, the European Brand Association, referenced nudging and societal concerns discussed in the earlier session as opportunities to strengthen the purpose of brands. She discussed the way consumers' trust is won, how it is sustained and presented the value of brands for consumers, companies and the wider economy. Social responsibility is a key in addressing the concerns of consumers who are no longer mere users of products but have become co-creators of brands.

Heiko Schipper, Member of the Bayer Management Board and Head of the Consumer Health Division, talked about the contribution of brands to the development and promotion of self-care, in particular how brands help consumer choice, using the example of Bayer's flagship brand 'Aspirin' and other self-care products. He agreed that for a brand it was important to be purpose-driven and equally important was to clearly articulate the purpose of the company.

Working together across the value chain was seen to be the way to sustain and encourage consumer trust, not forgetting transparency and integrity as one of the key values for the consumer. The panel agreed that companies should ensure that they stay relevant while remaining true to their purpose. The panellists agreed with the significance of umbrella branding for consumer health products, which in recent years faced a number of restrictions in some European countries. They acknowledged that AESGP and national AESGP members have devoted considerable efforts to preserve the right for the self-care industry to use umbrella branding and should continue to do so.



From left to right: Cathy Smith (moderator), Phil Riggins, Michelle Gibbons and Heiko Schipper

Phil Riggins, Founder of The Brand and Reputation Collective, discussed the role of 'brand' today, stressing

Harnessing Real-World Evidence for Self-Care

Real-world (medical) evidence (RWE) provides significant insight into how a medicine and other self-care products perform or are used in real-world settings. The ability to quickly transform real-world data sources such as electronic medical records (EMR), ePrescriptions or information we share on social media into evidence can improve health outcomes for individuals by helping the self-care industry and regulators to inform regulatory and commercial decisions. However, since this is a relatively new development, regulators are still being hesitant regarding its applications. The session then looked into the innovation potential that RWE could offer to the self-care industry.

Volker Spitzer, Global Principal, Consumer Health R&D, IQVIA, shared IQVIA insights in the real-world evidence use and its possible application for the consumer health industry. RWE offered a fast and cost-effective way to generate real-time insights and substantiate new claims based on established or new products complementing the existing knowledge. In the long-term, RWE held potential to change how consumers, companies and healthcare professional interact, fostering a more personalised healthcare with better outcomes.

Peter Brady, CEO of Orbital Global, presented the company's research methodology to support health claims for consumer health products by using RWE. Their methodology has already enabled global consumer healthcare brands to strengthen and/or develop new claims for both medicines and medical devices. He presented the advantages of the use of RWE in comparison to the randomised clinical trial, particularly stressing out time and cost. He however noted that RWE should only be seen as a complement to clinical trials.

It was concluded that RWE offers a huge prospect for the industry to uncover new claims and indications by generating customer-centric evidence and to support the development of new products and switching. Regulators are already looking into RWE as an additional source of data to support regulatory decisions and, as the two speakers explained, they are open to cooperation on the topic, albeit they are in practice still lagging behind in the uptake of RWE in practice.



From left to right: Volker Spitzer, Jurate Švarcaitė (moderator) and Peter Brady

National Good Practices in Self-Care



From left to right: Martin Bangerter (moderator), Sergio Mantelli, Elmar Kroth, Jaume Pey and Mirna Radošević

Looking again at the AESGP mission of advancing self-care, the session showcased some of the best national initiatives developed and implemented by AESGP member associations aiming to support the implementation of national self-care policy over the past year.

Switzerland recently revised its medicines regulation, which prompted the reclassification of 700 products and made a great number of non-prescription medicines available in supermarkets. **Sergio Mantelli**, Head of scientific affairs & public affairs at Verfora and member of ASSGP, Switzerland, provided an overview of the legislative changes as well as background including the motivation of the regulator.

Elmar Kroth, Managing Director Scientific Affairs, BAH, Germany, presented a recent BAH initiative calling for the improvement of the German switch climate, which has already yielded some results by increasing the awareness of stakeholders and mo-

tivation among member companies to apply for switches. One of the key goals for BAH remains to improve the switch procedure in Germany, which is complex and cumbersome.

Jaume Pey, General Manager of Anefp, Spain, presented Anefp's project EVAFARM (Value of self-care in the pharmacy), which was implemented in the selected mid-size pharmacies in Madrid and Barcelona to increase the awareness and skills of community pharmacists in self-care guidance as well as the turnover of pharmacies from self-care products. The next step in the project is an agreement with the Consejo General de Colegios Oficiales de Farmacéuticos (General Council of Pharmacists) to upscale the project and introduce it in pharmacies nationwide.

Mirna Radošević, President of the Board at the Salveo CEE Group and member of CASI, Croatia, presented a practical manual on self-care, developed by CASI which, similarly to the Anefp's project, addresses the pharmacist skills in self-care guidance and actively involves them through the Croatian Society of Pharmacists. The manual written by expert pharmacists was well accepted and is widely used by the pharmacists.

Moderated by **Martin Bangerter**, Director of ASSGP, Switzerland, the discussion focused on the challenges that associations encountered while implementing their initiatives. All reckoned that the sharing of best practices between national associations can be a significant added value of AESGP and can help to advance self-care at national level.

Alternative Scenarios

The final session served as a 'open-ended' conclusion as it encouraged participants to consider different scenarios challenging today's *status quo*. It re-examined a number of topics that were discussed throughout the two days of the conference.

David Zaruk, The Risk-Monger, launched the session by travelling back from the year 2050, introducing some thought-provoking ideas about how society might evolve in the next three decades due to the lack of public trust in science and technology. He shared a story of his sister-in-law Rachel, who is an outspoken naturopath and social media activist advocating against technology, science, industry and food. Responding to the 'Rachels' of today requires a better communication of facts by scientists as well as well-prepared regulators to manage societal concerns that are likely to increase.

Carlos Celis, Research Fellow at the Institute of Cardiovascular & Medical Sciences, University of Glasgow, shared some of his research on the role of lifestyle, especially diet, in dealing with the increasing burden of non-communicable diseases. He showed that by a simple modification of nutrition, millions of lives could be saved and the burden of chronic diseases could be reduced. Interestingly, when talking about personalised nutrition, there is little evidence to suggest that the genetic screening of individuals had any added value.

Tobias Gantner, Founder & CEO at HealthCare Futurists GmbH, outlined the digital future of healthcare, talking about a critical role of everyday technologies like cell phones, smartphone sensors, cloud storage, and data analytics in digital health today and in the future. He introduced the concept of gamification, which could be used to educate both consumers and healthcare professionals about self-care.

The three alternative outlooks on the future challenged the *status quo* and provided food for thought to the participants.



From left to right: David Zaruk, Carlos Celis and Tobias Gantner

Conclusions

The two-day discussions on the rapidly evolving environment in which the self-care industry operates consolidated a number of concepts and ideas, for the industry to advance self-care for the benefit of individuals and health systems.

Realising the potential of self-care both on an individual as well as on a societal level continues to be the main priority not just for the AESGP but also for its global and regional counterparts. This can only be achieved by working together, aligning on the key issues and sharing best practices on how to appropriately tackle the challenges. Involving major stakeholders, among which pharmacists and other healthcare professionals, is the key to success.

The consumer was at the heart of all debates, with a particular focus on the empowerment and health literacy. The rapid evolution of digital space offers an unparalleled opportunity to provide tools that would enable individuals to self-diagnose and self-manage their health needs and ultimately practise responsible self-care. The role of the pharmacy profession in guiding self

-care is a key enabler in a consumer-centred self-care policy. A better understanding of behavioural science behind individual choices provides a unique occasion to create a responsible self-care environment by design.

Trust came out as an overarching theme of the conference. Consumers are no longer simply looking for products, they are looking for purpose behind the brands they buy and the companies that manufacture them. With the proliferation of information especially via social media, their expectations are growing, with transparency at the top. Purpose-driven brands where consumers are co-creators are therefore vital to overcome their numerous concerns.

Environmental sustainability was identified as an important element to maintain relevance and build trust. When embracing sustainability, it is important to build a viable culture not only outside, but also inside companies. The self-care industry is embarking on this environmental and climate-conscious tsunami and is using it as an innovation opportunity.

Invitation to the 56th AESGP Annual Meeting in Milan

Delivering closing remarks, **Enrico Allievi**, Director of Assosalute, Italy, invited conference participants to the 56th AESGP Annual Meeting, which will take place in Milan from 26 to 28 May 2020.

