

DO COMPANIES' MARKET ACCESS TRAINING CAPABILITIES ADDRESS THE NEEDS OF TODAY'S COMPLEX PAYER MARKETPLACE?

Bailey S¹, Hewitt C¹, Craddy P²

¹Remap Consulting, Zug, Switzerland, ²Remap Consulting, Cheshire, United Kingdom



Introduction/objective

- Setting the price and obtaining market access for a new pharmaceutical remains one of the biggest commercial challenges facing manufacturers. As the payer landscape becomes increasingly challenging, demonstrating product value and considering the payer perspective as early as possible in clinical development is increasingly important.
- The objective of this research was to determine how the pharmaceutical industry is investing in their market access training capabilities in order to address the needs of today's complex market access landscape.

Methods

- Online research was completed by market access executives across a range of top 25 global pharma companies, as well as several smaller companies.
- The research focused on four main topics:
 - how market access was defined by their company
 - what market access training is currently provided
 - the extent to which different teams receive market access training
 - the nature of their company's priority market access training needs
- Feedback from 32 responses were analysed.

Results

- There are a number of key market access challenges facing pharmaceutical companies (Table 1)
- Overall consensus was that there is a general lack of market access expertise (44%) and investment (41%) facing pharmaceutical companies and their products. This is despite 38% of respondents feeling the increasingly challenging and sophisticated payer environment is a key market access challenge.

- Significant gaps in key market access training programmes exist across many companies covered in our research.
- Few respondents currently benefit from comprehensive training programmes that cover a full range of key market access topics, with less than 50% trained in managed entry agreements, health economics, health technology assessments and real-world evidence. (Table 2)

Table 1: Key market access challenges facing pharmaceutical companies

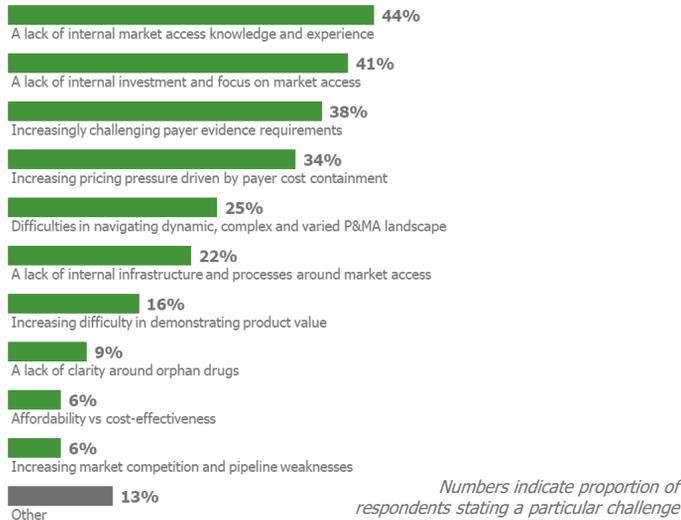
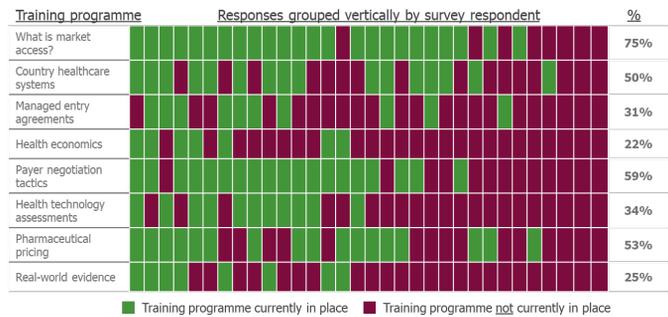
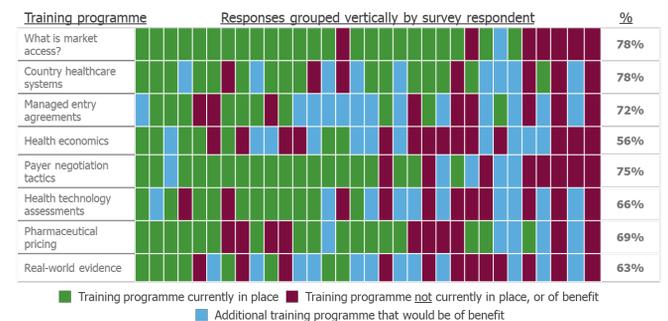


Table 2: Market access training programmes currently in place across companies



- Most respondents believe that implementing more comprehensive market access training would enhance business success. Managed entry agreements, health technology assessments and real-world evidence are a particular focus where additional training would be needed. (Table 3)

Table 3: Additional market access training programmes that would enhance business success



- In the majority of companies, market access training is not included within the core training for Commercial and R&D teams.
- 41% of respondents indicated that their Medical Affairs teams currently receive market access training, whilst only 9% of Clinical Development teams receive training.
- Market access is not consistently defined across companies, with 19% of respondents stating that either their organisation has no official definition of market access, or they are unsure what it is.
- "Achieving reimbursement" and "ensuring patient access" are the most common definitions of market access, although for some "market access" is simply limited to price negotiations or even just regulatory approval. (Figure 1)

Figure 1: How market access is defined & aligned across pharmaceutical companies



Size of bubble indicates number of mentions of a particular definition

Discussion and conclusions

- It is clear from our survey that companies are not placing sufficient focus on their market access capabilities across the organisation.
- Market Access teams can be under-resourced, lacking expertise and headcount, particularly among affiliates. Furthermore, limited infrastructure is in place to encourage collaboration between Market Access and R&D teams.
- Market access training should be provided beyond Market Access teams, such as Medical Affairs and Clinical Development. By not training such teams, companies are missing an opportunity to implement a more integrated, cross-functional approach to evidence generation that proactively addresses payer needs early in the development process.
- Despite resourcing and expertise limitations, companies currently rely heavily on internal teams to deliver their market access training. External providers are used in only a limited manner.