DO YOUR COMPANY’S MARKET ACCESS TRAINING CAPABILITIES ADDRESS THE NEEDS OF TODAY’S COMPLEX MARKETPLACE?

A white paper based on data collected by Remap Consulting in 2017
Executive summary

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.

Nevertheless, 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.

The term “market access” is not consistently defined across the industry or within companies, and in some companies is simply limited to price negotiations or regulatory approval.

Core training in market access is not provided for most Commercial or R&D teams, and only 38% of Medical Affairs departments currently receive market access training. Few companies currently provide a comprehensive training programme covering a full range of market access topics, and most companies rely on internal teams to deliver this training despite a lack of headcount and expertise.

Our respondents agree that colleagues in most other functions would benefit from market access training, and that implementing a more comprehensive market access training programme would enhance business success.

"Currently there is a lack of understanding of new stakeholders and how to best target them, and a lack of information sharing / best practices across countries"
Who completed our survey?

We surveyed 32 industry executives in total across a range of top 25 global pharma companies, as well as several smaller companies.

Our sample comprised a mix of personnel across different internal teams, including:

• Market access teams
• Training teams
• Commercial teams

Overview of company profiles:

- 1-10 ranked pharma: 31%
- 11-25 ranked pharma: 16%
- 26-50 ranked pharma: 16%
- Other pharma: 3%
- N/A, or not disclosed: 3%
A lack of internal market access expertise and investment is creating challenges for companies and their products

Whilst market access is one of the largest challenges facing the industry, the reality from our respondents is that this is not translating into additional resources or expertise on the ground.

Market access teams can be insufficiently resourced in terms of FTEs, and there is a general lack of internal knowledge and expertise. This is despite an increasingly challenging and sophisticated payer environment.

Our respondents feel that a market access ‘culture’ must be created in companies where this is currently lacking, with the infrastructure and processes put in place to encourage best-practice sharing and collaboration between teams.

"Creating a market access culture [is a challenge], including building a new market access department”

<table>
<thead>
<tr>
<th>Key market access challenges facing companies</th>
<th>Proportion</th>
</tr>
</thead>
<tbody>
<tr>
<td>A lack of internal market access knowledge and experience</td>
<td>44%</td>
</tr>
<tr>
<td>A lack of internal investment and focus on market access</td>
<td>41%</td>
</tr>
<tr>
<td>Increasingly challenging payer evidence requirements</td>
<td>38%</td>
</tr>
<tr>
<td>Increasing pricing pressure driven by payer cost containment</td>
<td>34%</td>
</tr>
<tr>
<td>Difficulties in navigating dynamic, complex and varied P&amp;MA landscape</td>
<td>25%</td>
</tr>
<tr>
<td>A lack of internal infrastructure and processes around market access</td>
<td>22%</td>
</tr>
<tr>
<td>Increasing difficulty in demonstrating product value</td>
<td>16%</td>
</tr>
<tr>
<td>A lack of clarity around orphan drugs</td>
<td>9%</td>
</tr>
<tr>
<td>Affordability vs cost-effectiveness</td>
<td>6%</td>
</tr>
<tr>
<td>Increasing market competition and pipeline weaknesses</td>
<td>6%</td>
</tr>
<tr>
<td>Other</td>
<td>13%</td>
</tr>
</tbody>
</table>

Numbers indicate proportion of respondents stating a particular challenge.

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Many companies do not have a clear, consistent internal definition of market access across their organisations

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.

Embedding a consistent definition of market access across your organisation helps teams work towards a common objective, mitigating payer concerns that may delay launch, lower reimbursable price or limit the potential patient population and ultimately reduce revenues.

How market access is defined across companies

- “Pricing”
- “The process for ensuring patient access”
- “Achieving reimbursement”
- “Pricing and reimbursement”
- “Payer-related activities / support”
- “Supporting negotiations with a range of stakeholders”
- “Regulatory approval”
- Unsure / not defined

Degree of internal alignment on definition of market access

Respondents feeling that teams are not aligned on the definition of market access: 50%

Respondents feeling that teams are aligned on the definition of market access: 50%

Size of bubble indicates number of mentions of a particular definition
Market access training is rarely provided for Medical Affairs or Clinical Development teams

In the majority of companies, market access training is not included within the core training for Commercial and R&D teams. A small number of companies are starting to roll such training out, but there is often a lack of appreciation of the value that it can bring to regional and local organisations.

Only 38% of respondents indicated that their Medical Affairs teams currently receive market access training, and this figure is just 6% for the Clinical Development teams. By not training these teams adequately, 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.

**Commercial and R&D teams receiving core market access training**

- Market access core training not provided for Commercial and R&D teams: 66%
- Market access core training provided for Commercial and R&D teams: 34%

**Teams across company currently receiving market access training**

- Market Access / Pricing: 88%
- Commercial / Marketing: 56%
- Medical Affairs: 38%
- Regulatory: 13%
- Clinical Development: 6%

*Numbers indicate proportion of respondents stating that teams currently receive training*
Significant gaps in key market access training programmes exist across many companies covered in our survey.

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.

### Market access training programmes currently in place across companies

<table>
<thead>
<tr>
<th>Training programme</th>
<th>Responses grouped vertically by survey respondent</th>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td>What is market access?</td>
<td></td>
<td>75%</td>
</tr>
<tr>
<td>Country healthcare systems</td>
<td></td>
<td>50%</td>
</tr>
<tr>
<td>Managed entry agreements</td>
<td></td>
<td>31%</td>
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<tr>
<td>Health economics</td>
<td></td>
<td>22%</td>
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<tr>
<td>Payer negotiation tactics</td>
<td></td>
<td>59%</td>
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<tr>
<td>Health technology assessments</td>
<td></td>
<td>34%</td>
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<tr>
<td>Pharmaceutical pricing</td>
<td></td>
<td>53%</td>
</tr>
<tr>
<td>Real-world evidence</td>
<td></td>
<td>25%</td>
</tr>
</tbody>
</table>

- **Training programme currently in place**
- **Training programme not currently in place**
Most respondents believe training in market access for Medical Affairs and Commercial teams would be beneficial

When considering which internal teams would benefit from additional market access training, our survey respondents feel that appropriate training should be delivered to their colleagues in most other key functions. For example, 72% of our sample believe that Commercial / Marketing should receive market access training, and 59% feel the same for Medical Affairs.

Other personnel that may benefit from market access training include Public Affairs teams, as well as clinical development.

Teams across company that would benefit from receiving MA training

- Market Access / Pricing: 69% (66% currently receiving training, 6% not currently receiving training, but would benefit from it)
- Commercial / Marketing: 56% (72% currently receiving training, 13% not currently receiving training, but would benefit from it)
- Medical Affairs: 38% (59% currently receiving training, 13% not currently receiving training, but would benefit from it)
- Regulatory: 13% (47% currently receiving training, 6% not currently receiving training, but would benefit from it)
- Clinical Development: 6% (44% currently receiving training, 6% not currently receiving training, but would benefit from it)
Most respondents believe that implementing training across all key market access areas would benefit their company.

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.

### Additional market access training programmes that would enhance business success

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<td>Country healthcare systems</td>
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<td>Managed entry agreements</td>
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<td>66%</td>
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<tr>
<td>Pharmaceutical pricing</td>
<td></td>
<td>69%</td>
</tr>
<tr>
<td>Real-world evidence</td>
<td></td>
<td>63%</td>
</tr>
</tbody>
</table>

- Green: Training programme currently in place
- Light blue: Additional training programme that would be of benefit
- Dark red: Training programme not currently in place, or of benefit

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Companies currently rely heavily on internal teams to deliver training, using external providers in only a limited manner.

The Market Access / Pricing team is typically responsible for providing market access training, with external providers rarely used, despite the headcount and expertise constraints highlighted by respondents elsewhere in the survey.

Market access training is usually provided in the form of a face-to-face workshop supplemented by a PowerPoint slide presentation, or eLearning modules. External providers occasionally input into such modules, though they are not often integrated into training programmes in most companies.

### Responsibility for market access training

- **Market Access / Pricing team**: 72%
- **External provider**: 13%
- **Learning & Development team**: 22%

### Format of current market access training

- **F2F workshop**: 53%
- **PowerPoint**: 53%
- **eLearning**: 38%
- **Webinar**: 12%
In summary, a significant expertise gap remains if market access teams are to meet the demanding payer environment.

- Market access teams across the industry are often under-resourced, lacking the knowledge and expertise to navigate a dynamic and challenging payer landscape.

- “Market access” is not consistently defined across the industry, nor within companies in some instances.

- Market access training is rarely provided for Medical Affairs or Clinical Development teams, and existing training programmes often exclude key topics such as managed entry agreements, health economics, health technology assessments and real-world evidence.

- Most respondents believe that training in market access for Medical Affairs and Commercial teams would be beneficial, and that implementing more comprehensive market access training programmes would enhance business success.

- 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.
Remap Consulting is a specialist pharmaceutical pricing and market access consultancy

We work with people responsible for the pricing and market access of products who are asking:

**LAUNCH IMPLEMENTATION**
Have we got the right evidence to support pricing and market access at launch?

**TRAINING**
Do we have the right training capabilities to secure pricing and reimbursement?

**PRICE OPTIMISATION**
What is the optimal price for our product?
Pricing and Market Access training is one of our core competencies

We are specialists in provide training on a broad range of market access courses including:

- ‘What is’ Market access
- Health technology assessment
- Health economics
- Pharmaceutical pricing
- Country healthcare systems
- Payer negotiation tactics
- Managed entry agreements
- Real world evidence

Our expertise in pricing, health economics and market access coupled with our in-house creative instructional design team, allow us to create and deploy bespoke training solutions designed to meet your needs. We aim to make the transfer of knowledge more flexible, effective, and engaging across organisations of all sizes, by offering interactive, engaging training solutions.
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