DEFINING MARKET ACCESS IN BRAZIL: THE PHARMA PROFESSIONALS’ PERSPECTIVE

Nishikawa AM*, Santinho CS†, Julian GP†, Peddie A†, Clemente V*†

Evidências – Kantar Health, São Paulo, Brazil; Evidence – Kantar Health, Campinas, SP, Brazil

ABSTRACT

OBJECTIVES: Innovation in healthcare has become increasingly expensive making it difficult for pharmaceutical companies (PP) to have their products marketed. The Brazilian market is even more complex due to the current economic crisis, complex incorporation pathways and the lack of qualified professionals. Therefore, we aimed to analyze whether pharma professionals (PP) in Market Access understand the major focus on the Private Healthcare System by the professionals in the Public Healthcare System. The concept of Market Access is dynamic, because the health landscape scenario is constantly changing. However, in the last decades, a more challenging scenario for new drugs is rapidly development, mainly driven by the regulatory changes in health technology costs and restricted budget, international economic crisis, entering of new players in the market, the booming of sale medicine and health technology assessment (HTA), lack of innovation and increasing costs in HTA model and structuring the Market Access area, focusing in the Public and Private Healthcare Systems. Most expected difficulties are the lack of integration between internal and external organizations and the lack of qualified professionals in Brazil.

CONCLUSION: There was a great disparity in the definitions of what is market access, mostly due to the recent increase in the importance of the area. Also, many PP still do not have enough training to build a successful MA strategy, besides lacking the necessary integration with other areas to achieve their objectives.

INTRODUCTION

• In the past, the evidence of safety and efficacy of a new product was enough for a drug to reach the market successfully. However, in the last decades, a more challenging scenario for new drugs is rapidly development, mainly driven by the regulatory changes in health technology costs and restricted budget, international economic crisis, entering of new players in the market, the booming of sale medicine and health technology assessment (HTA), lack of innovation and increasing costs in HTA model and structuring the Market Access area, focusing in the Public and Private Healthcare Systems. Most expected difficulties are the lack of integration between internal and external organizations and the lack of qualified professionals in Brazil.

• This scenario changed the strategy and focus of the pharmaceutical companies and professionals, previous focused just in market authorization and regulatory approval, for the introduction of new drugs to the market.

• Worldwide, the traditional model for selling medicines with large sales teams is gradually been replaced by more effective strategies, focusing on the needs of stakeholders and the importance of cost-effectiveness of new HTA area.

• With the growing scenario complexity with the need of "innovation" of these technologies (Insurance plans, government) and implementation of Health Technology Assessment (HTA), the creation of HTA in all countries and structuring the Private Healthcare System, in the last years, pharmaceutical companies are rethinking their business models by structuring the Market Access area focusing in the Public and Private Healthcare System and also Patients groups and non-governmental organizations (Figure 1).

OBJECTIVE

The main objective of this research is to understand the perception of pharmaceutical professionals in the Brazilian Market Access area importance and functions, as well to understand challenges and perspectives for the near future.

METHODOLOGY

We conducted a primary research through questionnaires among Brazilian pharmaceutical professionals from different areas (sales, marketing, medical affairs, market access and health economics) in different pharmaceutical companies in the city of São Paulo - Brazil, between the months of July and December 2014.

The survey consisted in two open-ended related questions:

How do you define market access?

- Mention one difficult market access that you have faced or you will have to solve.

The answers were coded, tabulated and analyzed by patterns of answers by two researchers. The results were presented descriptively and quantitatively.

RESULTS

When asked to the responders the questions “How would you define Market access?”, we found no unique answer.

According to Graph 1, approximately 15% defined Market Access as Drugs to treat, medical care and hospitalizations, followed by health assistance (12%) and access only to drugs (12%).

Figure 1. Market Access Area History and the Changes of the Technological Relationship in Brazil

Table 1. Major Concerns in Market Access Area

<table>
<thead>
<tr>
<th>Concern</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Lack of integration with the others areas in the company</td>
<td>How do you define market access?</td>
</tr>
<tr>
<td>2. What is the area role?</td>
<td>How do you define market access?</td>
</tr>
<tr>
<td>3. Lack of understanding of the incorporation process (difficulties and barriers)</td>
<td>How do you define market access?</td>
</tr>
</tbody>
</table>

Table 2. Internal barriers in Market Access

<table>
<thead>
<tr>
<th>Barriers</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Lack of integration with the others areas in the company</td>
<td>How do you define market access?</td>
</tr>
<tr>
<td>2. What is the area role?</td>
<td>How do you define market access?</td>
</tr>
<tr>
<td>3. Lack of understanding of the incorporation process (difficulties and barriers)</td>
<td>How do you define market access?</td>
</tr>
<tr>
<td>4. Difficult to find qualified professionals in the area</td>
<td>How do you define market access?</td>
</tr>
</tbody>
</table>

DISCUSSION

• Through our analysis, we noticed that the Market Access area is usually related to drugs and private health system. We firmly observed association with-vehicle, since it is implicit under general health services/assistance.

• We observed a lack of training for the Market access area professionals, which results in poor executions of their tasks.

• There is a broad and different opinions and perspectives to define Market Access. The Market access area in Brazil still a recent area, with a few accentuations, including for those who work in the area. In Brazil there is no clear definition of area objective and perspectives, noticing that each company has a different structure for the Market Access Area. Some companies' Market Access area only consider the activities to build a relationship with the payers, other see the whole process including regulatory affairs, pricing & reimbursement, HTA, advocacy (Figure 8).

The concept of Market Access is dynamic, because the health landscape scenario is constantly changing. However, in the last decades, a more challenging scenario for new drugs is rapidly development, mainly driven by the regulatory changes in health technology costs and restricted budget, international economic crisis, entering of new players in the market, the booming of sale medicine and health technology assessment (HTA), lack of innovation and increasing costs in HTA model and structuring the Market Access area, focusing in the Public and Private Healthcare Systems.

As a result, the Market Access area should be multidisciplinary and we can observe the answers as important difficulty for the pharma professionals by the pharma professionals. In figure 8, we can identify the key elements of market access area:

• Adapted from Evidencias 3

In order to improve these professionals knowledge and skills, some actions need to be taken in all phases, including:

- Regular internal/external training and external socialization;
- Development of strategies by understanding the needs of all stakeholders involved in the adoption, positioning and funding of the product.

CONCLUSION

The concept of Market Access is dynamic, because the health landscape scenario is constantly changing, and can vary in each company.

The real Market Access area scope is related to the system’s maturity and through time changing from an area that used to go after funding to much complex area that defines and implements incorporation strategies.

The society must keep deepening into discussion for development of new tools for market access improvement.