

**Market Access Climate Change:
the Evolving Impact of Product Listing Agreements Webinar**

Date: October 30, 2015

Time: 11:00am-12:00pm

Max Number of Participants: 58 (pharmaceutical companies and insurers)

Question 1

Given the Liberal government's interest in bulk purchasing to reduce costs, how likely do you think it is that the pan-Canadian Pharmaceutical Alliance (pCPA) will be the starting point for some form of national Pharmacare program?

Highly Likely	9%
Likely	53%
Neutral	13%
Unlikely	22%
Highly Unlikely	3%

Question 2

Given the Liberal government's interest in reviewing the rules of the PMPRB, do you believe the federal government will aim to make this regulatory body more "relevant"?

Yes	80%
No	20%

Question 3

Has your company negotiated a product listing agreement with the pCPA?

Yes	52%
No	48%

Question 4

Which of the following developments at the pCPA do you find to be most positive over the past few years?

Improved communication between pCPA and manufacturers	17%
A better understanding of the pCPA process	33%
Agreement by all parties that HTA recommendation forms the content basis of agreement	17%
None of the above	33%

Question 5

Which of the following elements of the negotiation are the most challenging?

Adjustment to the BIA during negotiations	11%
Significant variance in timeliness of listing and lead province's capacity/capabilities	53%
Difficulty negotiating an outcome-based agreement	29%
None of the above	7%

Question 6

Please indicate the level of agreement with the following statement: "The creation of the new pCPA office will significantly improve the negotiation process between the pCPA and manufacturers."

Strongly agree	3%
Agree	26%
Neutral	65%

Disagree	6%
Strongly disagree	0%
Question 7	
What impact do you believe the inclusion of Quebec into the pCPA process will have on listing performance (number of products and time to listing) in Quebec?	
Improve the performance (quicker listing of more products)	23%
Deteriorate the performance (slower listing of fewer products)	64%
Will not impact the performance	13%
Question 8	
How likely do you think it is that private payers will be joining the pCPA?	
Highly Likely	6%
Likely	16%
Neutral	23%
Unlikely	42%
Highly Unlikely	13%
Question 9	
Has your company negotiated a product listing agreement with a private payer?	
Yes	14%
No	86%
Question 10	
What type of products are you prepared to negotiate a private payer product listing agreement for?	
Specialty product (e.g. Enbrel)	22%
Drug for rare disease (e.g. Kalydeco)	13%
Non-specialty product	4%
All of the above	35%
None of the above	26%
Question 11	
Do you believe confidentiality of private payer PLAs is a significant challenge for manufacturers?	
Yes	90%
No	10%
Question 12	
Manulife recently released its DrugWatch Program™ aimed at providing greater scrutiny on specialty products. Do you believe that other major carriers will follow Manulife's lead and create similar programs?	
Yes	97%
No	3%