

Supplementary material 1

Legend:

- Questions administered to the entire sample (n= 50)
- Questions administered only to respondents from companies that have structurally implemented AI (n= 22)
- Questions administered only to respondents from companies that have not structurally implemented AI (n=28)
- Questions administered only to respondents from companies that have structurally implemented AI in MA (n=11)
- Questions administered only to respondents from companies that have structurally implemented AI, but NOT in MA (n=11)
- Questions administered only to respondents from companies that plan to implement AI (n=17)
- Questions administered only to respondents from companies that do not plan to implement AI (n=11)

Table 1. Survey Structure

Questions	Answers
1. Which of these options best describes your company?	○ Big Pharma Company ○ Medium Pharma Company ○ Small Pharma Company ○ Start Up
2. Has AI been structurally implemented in your organization?	○ Yes ○ No ○ I'm not sure
3. How much time per day do you usually use the AI tools that have been implemented in your company?	○ <2 h ○ 2-4 h ○ >4 h
4. How often do you personally use AI online available tools in your daily work activities?	○ always ○ occasionally ○ almost never ○ never
5. Which approach was used to implement AI (make or buy)?	○ We decided to "make" the AI in-house, developing our own solutions and models ○ We chose to "buy" AI solutions by partnering with external vendors or purchasing ready-made software ○ We took a hybrid approach, building some components in-house and buying others from third-party providers ○ We initially bought AI solutions but are gradually moving towards developing our own in-house capabilities

6. Has your company allocated a specific budget dedicated to AI implementation?	○ Yes ○ No ○ I'm not sure
7. Has your company seen an economic return on investment?	○ Yes, we have seen a positive return on investment ○ Yes, but it's been slower than anticipated ○ Yes, but it's difficult to quantify the exact ROI at this point ○ Yes, the return has exceeded our expectations ○ No, we have not seen a return yet, but we are still in the early stages ○ No, we haven't seen a return on investment so far ○ No, we are still waiting for measurable results
8. Which are the main obstacles your company is facing/faced in AI implementation? (Multiple answers allowed)	○ Lack of internal expertise ○ Legal and regulatory uncertainties ○ High implementation costs ○ Difficulties in data integration ○ No significant obstacles ○ I'm not sure
9. What have been the main benefits of implementing AI in your company? (Multiple answers allowed)	○ Increased operational efficiency ○ Improved decision-making through data insights ○ Enhanced customer experience ○ Visibility ○ Cost reduction ○ Development of new products or services ○ No significant benefits observed
10. What have been the main negative outcomes observed following the implementation of AI in your company? (Multiple answers allowed)	○ Reduced transparency in decision-making processes ○ Decreased employee engagement or job satisfaction ○ Errors or biases in AI-generated outputs affecting business decisions ○ Overdependence on automated systems, reducing critical human oversight ○ Negative impact on organizational culture or collaboration ○ Regulatory or compliance issues resulting from AI use ○ No significant negative outcomes observed
11. In which of the following areas is AI mostly used in your company? (Multiple answers allowed)	○ R&D ○ Marketing ○ Medical ○ Market Access ○ Legal ○ Commercial ○ Digital ○ Manufacturing
12. Has AI been integrated in your company for Market Access purposes? If yes, at which level?	○ At a strategic level (e.g. in the adoption of solutions at business level)

	○ At an operational level (e.g. in the day-to-day implementation of market access processes) ○ Both of the above mentioned options ○ I'm not sure ○ No, AI has not been integrated in my company for market access purposes
13. Does your company plan to implement the use of AI in Market Access in the next 12 months?	○ Yes, significantly ○ Yes, but in a limited way ○ No ○ I'm not sure
14. Which are the key factors preventing the adoption of Artificial Intelligence in your company in Market Access activities? (Multiple answers allowed)	○ Lack of AI solutions tailored to health economics or HTA processes aligned with current reimbursement or tendering procedures ○ Difficulty in accessing high-quality data for Market Access purposes ○ Lack of internal capabilities to evaluate or manage AI tools in Market Access ○ Perception that AI adds limited value compared to existing tools/methods ○ Budget constraints specific to Market Access functions ○ Internal skepticism or low trust in AI-driven decision-making ○ Lack of successful case studies in Market Access to justify adoption ○ Organizational silos: AI initiatives are driven by other departments (e.g., R&D, commercial)
15. Which do you see as the main obstacles your company anticipate facing in AI implementation in Market Access? (Multiple answers allowed)	○ Limited availability or quality of real-world data (RWD) for AI training ○ Difficulty integrating AI tools with existing Market Access systems and processes ○ Lack of internal expertise in both AI and Market Access domains ○ Concerns about regulatory acceptance of AI-driven evidence or models ○ Uncertainty about the ethical implications of AI in payer or HTA interactions ○ Resistance from internal stakeholders to adopt AI-based approaches ○ High cost of developing or acquiring tailored AI solutions for Market Access ○ No significant challenges encountered
16. Which do you see as the main obstacles your company has faced in AI implementation in Market Access? (Multiple answers allowed)	○ Limited availability or quality of real-world data (RWD) for AI training ○ Difficulty integrating AI tools with existing Market Access systems and processes

	○ Lack of internal expertise in both AI and Market Access domains ○ Concerns about regulatory acceptance of AI-driven evidence or models ○ Uncertainty about the ethical implications of AI in payer or HTA interactions ○ Resistance from internal stakeholders to adopt AI-based approaches ○ High cost of developing or acquiring tailored AI solutions for Market Access ○ No significant challenges encountered
17. Which are the main advantages your company has encountered in using AI in Market Access activities? (Multiple answers allowed)	○ Improved identification and prioritization of target markets and payers ○ Enhanced pricing and reimbursement strategy through predictive analytics ○ Faster generation of health economic and outcomes research (HEOR) models ○ Greater efficiency in developing value dossiers and submissions ○ Improved stakeholder engagement through AI-driven communication tools ○ No significant benefits observed
18. Which negative outcomes has your company experienced as a result of implementing AI in Market Access activities? (Multiple answers allowed)	○ Inaccurate or biased recommendations affecting pricing and reimbursement strategies ○ Increased complexity in managing stakeholder relationships due to AI-driven processes ○ Disruption of existing workflows and inefficiencies in team collaboration ○ Reduced transparency in AI-generated insights used for decision-making ○ Difficulty in justifying AI-driven models during regulatory or payer reviews ○ Lower trust from healthcare professionals or payers due to AI involvement ○ No significant negative outcomes observed
19. If the consultancy firm your company relies on, used AI for Market Access purposes....	○ ...I would perceive it as an added value ○ ...I would have doubts about the quality of the output ○ ...I would no longer rely on that consultancy firm ○ ...I would be indifferent
20. Which are your organization's main concerns when working with a consulting firm that uses AI technologies? (Multiple answers allowed)	○ Data privacy - Concerns about how sensitive or proprietary data will be handled ○ Ethical risks – Fear of bias, lack of transparency, or unethical use of AI algorithms ○ Lack of clear ROI – Uncertainty about the tangible benefits and effectiveness of AI solutions

	○ Over-automation – Risk of relying too much on AI and reducing human oversight ○ Limited AI understanding – Difficulty in evaluating or challenging AI-driven recommendations ○ Integration issues – Potential challenges in aligning AI tools with existing systems or processes ○ High costs – Concern about the financial investment required for AI-enabled consulting
21. Have you previously worked with consulting firms that integrated AI into Market Access projects?	○ Yes ○ No
22. How would you describe your past experience with consulting firms that incorporated AI into Market Access initiatives?	○ It worsened the collaboration experience with the consulting firm ○ I did not perceive any added value compared to consulting services that do not use AI in Market Access ○ I perceived a slight improvement ○ AI clearly brought added value to the collaboration
23. What do you think will be the Market Access activities in which AI application will grow the most in the future? (Multiple answers allowed)	○ Market Analysis and Forecasting – Enhanced data-driven insights for forecasting market trends and demand ○ Pricing and Reimbursement Strategy – Optimizing pricing models and reimbursement negotiations using AI-based analytics ○ Payer Engagement and Relationship Management – Automating and personalizing interactions with payers and stakeholders ○ Health Economics and Outcomes Research (HEOR) – AI-driven models for cost-effectiveness analysis and real-world evidence generation ○ Automating Documentation and Reporting – Reducing manual tasks in submissions, dossiers, and reports ○ Market Segmentation and Targeting – AI-assisted identification of key market segments and targeting the right audiences ○ Communication and Stakeholder Engagement – Using AI for efficient communication strategies with stakeholders
24. How often do you personally use AI online available tools in your daily work activities?	○ always ○ occasionally ○ almost never ○ never
25. Does your company plan to implement the use of AI in the next 12 months?	○ Yes, significantly ○ Yes, but in a limited way ○ No ○ I'm not sure
26. Which are the main reasons your company is reluctant about AI implementation? (Multiple answers allowed)	○ Unclear return on investment (ROI) ○ Budget limitations ○ Regulatory or compliance concerns ○ Low perceived relevance to current business needs

	○ Concerns about data privacy or security ○ Organizational resistance to innovation
27. Will AI implementation also target Market Access activities?	○ Yes, significantly ○ Yes, but in a limited way ○ No ○ I'm not sure
28. Which are the main reasons your company is considering adopting AI? (Multiple answers allowed)	○ We believe AI will be a key driver of future innovation and competitiveness ○ We want to stay aligned with industry trends and technological advancements ○ We are generally proactive in adopting emerging technologies ○ We see AI as essential for long-term strategic growth ○ Our leadership strongly supports digital transformation initiatives ○ We are exploring AI to enhance our company's image as an innovator ○ We are responding to interest or pressure from partners, clients, or stakeholders
29. Which do you see as the main obstacles to AI implementation? (Multiple answers allowed)	○ Lack of internal expertise ○ Legal and regulatory uncertainties ○ High implementation costs ○ Difficulties in data integration ○ No significant obstacles ○ I'm not sure
30. How familiar are you with the potential applications of AI in pharmaceutical operations (e.g., R&D, Market Access, Medical Affairs, etc.)? Indicate it on a scale from 1 (not familiar at all) to 5 (extremely familiar).	○ 1 ○ 2 ○ 3 ○ 4 ○ 5
31. Do you see potential value in using AI specifically within Market Access activities (e.g., pricing strategy, HTA submissions, stakeholder mapping)?	○ Yes ○ No ○ I'm not sure
32. Which of the following would most likely encourage your company to consider adopting AI in the future? (Multiple answers allowed)	○ Evidence of successful AI use cases in the pharmaceutical industry ○ Clear regulatory guidelines for AI applications ○ Availability of skilled AI professionals ○ Access to high-quality data ○ Lower implementation costs ○ Partnerships with AI technology providers ○ Internal strategic shift toward digital transformation
33. If the consultancy firm your company relies on, used AI for Market Access purposes....	○ ...I would perceive it as an added value ○ ...I would have doubts about the quality of the output ○ ...I would no longer rely on that consultancy firm ○ ...I would be indifferent

34. Which are your organization's main concerns when working with a consulting firm that uses AI technologies? (Multiple answers allowed)	○ Data privacy - Concerns about how sensitive or proprietary data will be handled ○ Ethical risks – Fear of bias, lack of transparency, or unethical use of AI algorithms ○ Lack of clear ROI – Uncertainty about the tangible benefits and effectiveness of AI solutions ○ Over-automation – Risk of relying too much on AI and reducing human oversight ○ Limited AI understanding – Difficulty in evaluating or challenging AI-driven recommendations ○ Integration issues – Potential challenges in aligning AI tools with existing systems or processes ○ High costs – Concern about the financial investment required for AI-enabled consulting
35. Have you previously worked with consulting firms that integrated AI into Market Access projects?	○ Yes ○ No
36. How would you describe your past experience with consulting firms that incorporated AI into Market Access initiatives?	○ It worsened the collaboration experience with the consulting firm ○ I did not perceive any added value compared to consulting services that do not use AI in Market Access ○ I perceived a slight improvement ○ AI clearly brought added value to the collaboration
37. What do you think will be the Market Access activities in which AI application will grow the most in the future? (Multiple answers allowed)	○ Market Analysis and Forecasting – Enhanced data-driven insights for forecasting market trends and demand ○ Pricing and Reimbursement Strategy – Optimizing pricing models and reimbursement negotiations using AI-based analytics ○ Payer Engagement and Relationship Management – Automating and personalizing interactions with payers and stakeholders ○ Health Economics and Outcomes Research (HEOR) – AI-driven models for cost-effectiveness analysis and real-world evidence generation ○ Automating Documentation and Reporting – Reducing manual tasks in submissions, dossiers, and reports ○ Market Segmentation and Targeting – AI-assisted identification of key market segments and targeting the right audiences ○ Communication and Stakeholder Engagement – Using AI for efficient communication strategies with stakeholders

Table 2. Questions administered to the entire sample (n=50)

	AI implemented in MA	AI implemented NOT in MA	AI implemented TOT	AI implementation planned	AI implementation NOT planned	AI NOT implemented TOT	TOT
Which of these options best describes your company?	N (%) [11 tot]	N (%) [11 tot]	N (%) [22 tot]	N (%) [17 tot]	N (%) [11 tot]	N (%) [28 tot]	N (%) [50 tot]
Big Pharma Company	9 (82%)	2 (18%)	11 (50%)	1 (6%)	1 (9%)	2 (7%)	13 (26%)
Medium Pharma Company	1 (9%)	4 (36%)	5 (23%)	9 (53%)	4 (36%)	13 (46%)	18 (36%)
Small Pharma Company	1 (9%)	5 (45%)	6 (27%)	7 (41%)	6 (55%)	13 (46%)	19 (38%)
How often do you personally use AI online available tools in your daily work activities?							
always	6 (55%)	1 (9%)	7 (32%)	7 (41%)	5 (45%)	12 (43%)	19 (38%)
occasionally	4 (36%)	8 (73%)	12 (55%)	8 (47%)	5 (45%)	13 (46%)	25 (50%)
almost never	0 (0%)	1 (9%)	1 (5%)	1 (6%)	1 (9%)	2 (7%)	3 (6%)
never	1 (9%)	1 (9%)	2 (9%)	1 (6%)	0 (0%)	1 (4%)	3 (6%)
If the consultancy firm your company relies on, used AI for Market Access purposes....							
...I would perceive it as an added value	7 (64%)	5 (45%)	12 (55%)	11 (65%)	5 (45%)	16 (57%)	28 (56%)
...I would have doubts about the quality of the output	2 (18%)	4 (36%)	6 (27%)	3 (18%)	3 (27%)	6 (21%)	12 (24%)
...I would no longer rely on that consultancy firm	1 (9%)	0 (0%)	1 (5%)	0 (0%)	0 (0%)	0 (0%)	1 (2%)
...I would be indifferent	1 (9%)	2 (18%)	3 (14%)	1 (6%)	1 (9%)	2 (7%)	5 (10%)
Other...(Depends on use cases, on the output and on the confidentiality)	0 (0%)	0 (0%)	0 (0%)	2 (12%)	2 (18%)	4 (14%)	4 (8%)
Which are your organization's main concerns when working with a consulting firm that uses AI technologies?							
Data privacy - Concerns about how sensitive or proprietary data will be handled	10 (91%)	7 (64%)	17 (77%)	12 (71%)	7 (64%)	19 (68%)	36 (72%)
Ethical risks – Fear of bias, lack of transparency, or unethical use of AI algorithms	5 (45%)	4 (36%)	9 (41%)	10 (59%)	5 (45%)	15 (54%)	24 (48%)

Lack of clear ROI – Uncertainty about the tangible benefits and effectiveness of AI solutions	4 (36%)	4 (36%)	8 (36%)	4 (24%)	3 (27%)	7 (25%)	15 (30%)
Over-automation – Risk of relying too much on AI and reducing human oversight	4 (36%)	6 (55%)	10 (45%)	11 (65%)	7 (64%)	18 (64%)	28 (56%)
Limited AI understanding – Difficulty in evaluating or challenging AI-driven recommendations	2 (18%)	4 (36%)	6 (27%)	9 (53%)	3 (27%)	12 (43%)	18 (36%)
Integration issues – Potential challenges in aligning AI tools with existing systems or processes	1 (9%)	3 (27%)	4 (18%)	6 (35%)	1 (9%)	7 (25%)	11 (22%)
High costs – Concern about the financial investment required for AI-enabled consulting	2 (18%)	2 (18%)	4 (18%)	1 (6%)	1 (9%)	2 (7%)	6 (12%)
Other...(I'm not sure)	0 (0%)	0 (0%)	0 (0%)	0 (0%)	1 (9%)	1 (4%)	1 (2%)
Have you previously worked with consulting firms that integrated AI into Market Access projects?							
Yes	3 (27%)	2 (18%)	5 (23%)	5 (29%)	1 (9%)	6 (21%)	11 (22%)
No	8 (73%)	9 (82%)	17 (77%)	12 (71%)	10 (91%)	22 (79%)	39 (78%)
How would you describe your past experience with consulting firms that incorporated AI into Market Access initiatives?							
It worsened the collaboration experience with the consulting firm	0 (0%)	0 (0%)	0 (0%)	0 (0%)	0 (0%)	0 (0%)	0 (0%)
I did not perceive any added value compared to consulting services that do not use AI in Market Access	1 (33%)	1 (50%)	2 (40%)	1 (20%)	0 (0%)	1 (17%)	3 (27%)
I perceived a slight improvement	1 (33%)	0 (0%)	1 (20%)	2 (40%)	0 (0%)	2 (33%)	3 (27%)
AI clearly brought added value to the collaboration	1 (33%)	1 (50%)	2 (40%)	2 (40%)	1 (100%)	3 (50%)	5 (45%)
What do you think will be the Market Access activities in which AI application will grow the most in the future?							
Market Analysis and Forecasting – Enhanced data-driven insights for forecasting market trends and demand	9 (82%)	7 (64%)	16 (73%)	13 (76%)	10 (91%)	23 (82%)	39 (78%)
Pricing and Reimbursement Strategy – Optimizing pricing models and reimbursement negotiations using AI-based analytics	7 (64%)	5 (45%)	12 (55%)	10 (59%)	6 (55%)	16 (57%)	28 (56%)

Payer Engagement and Relationship Management – Automating and personalizing interactions with payers and stakeholders	2 (18%)	1 (9%)	3 (14%)	3 (18%)	2 (18%)	5 (18%)	8 (16%)
Health Economics and Outcomes Research (HEOR) – AI-driven models for cost-effectiveness analysis and real-world evidence generation	8 (73%)	5 (45%)	13 (59%)	9 (53%)	7 (64%)	16 (57%)	29 (58%)
Automating Documentation and Reporting – Reducing manual tasks in submissions, dossiers, and reports	8 (73%)	5 (45%)	13 (59%)	14 (82%)	8 (73%)	22 (79%)	35 (70%)
Market Segmentation and Targeting – AI-assisted identification of key market segments and targeting the right audiences	3 (27%)	5 (45%)	8 (36%)	8 (47%)	6 (55%)	14 (50%)	22 (44%)
Communication and Stakeholder Engagement – Using AI for efficient communication strategies with stakeholders	4 (36%)	2 (18%)	6 (27%)	6 (35%)	2 (18%)	8 (29%)	14 (28%)
Other...(Objection handling/drafting; SLRs semi-automation, PICO prediction; Automating writing and analysis of dossiers)	0 (0%)	0 (0%)	0 (0%)	2 (12%)	1 (9%)	3 (11%)	3 (6%)

Table 3. Results for the questions administered only to respondents from companies that have structurally implemented AI (n=22)

	AI implemented in MA	AI implemented NOT in MA	AI implemented TOT
How much time per day do you usually use the AI tools that have been implemented in your company?	N (%) [11 tot]	N (%) [11 tot]	N (%) [22 tot]
<2 h	7 (64%)	10 (91%)	17 (77%)
2-4 h	4 (36%)	1 (9%)	5 (23%)
>4 h	0 (0%)	0 (0%)	0 (0%)
Which approach was used to implement AI (make or buy)?			
We chose to "buy" AI solutions by partnering with external vendors or purchasing ready-made software	7 (64%)	4 (36%)	11 (50%)
We took a hybrid approach, building some components in-house and buying others from third-party providers	1 (9%)	4 (36%)	5 (23%)
We decided to "make" the AI in-house, developing our own solutions and models	3 (27%)	2 (18%)	5 (23%)
We initially bought AI solutions but are gradually moving towards developing our own in-house capabilities	0 (0%)	1 (9%)	1 (5%)
Has your company allocated a specific budget dedicated to AI implementation?			
I'm not sure	7 (64%)	4 (36%)	11 (50%)
Yes	4 (36%)	5 (45%)	9 (41%)
No	0 (0%)	2 (18%)	2 (9%)
Has your company seen an economic return on investment?			
Yes, we have seen a positive return on investment	2 (18%)	0 (0%)	2 (9%)
Yes, but it's been slower than anticipated	0 (0%)	0 (0%)	0 (0%)
Yes, but it's difficult to quantify the exact ROI at this point	6 (55%)	6 (55%)	12 (55%)
Yes, the return has exceeded our expectations	0 (0%)	0 (0%)	0 (0%)
No, we have not seen a return yet, but we are still in the early stages	0 (0%)	1 (9%)	1 (5%)
No, we haven't seen a return on investment so far	0 (0%)	0 (0%)	0 (0%)
No, we are still waiting for measurable results	3 (27%)	4 (36%)	7 (32%)
Which are the main obstacles your company is facing/faced in AI implementation?			
Lack of internal expertise	6 (55%)	5 (45%)	11 (50%)
Legal and regulatory uncertainties	5 (45%)	7 (64%)	12 (55%)
High implementation costs	0 (0%)	1 (9%)	1 (5%)
Difficulties in data integration	2 (18%)	5 (45%)	7 (32%)
No significant obstacles	0 (0%)	0 (0%)	0 (0%)
I'm not sure	3 (27%)	3 (27%)	6 (27%)
Other...(Security/confidentiality)	0 (0%)	1 (9%)	1 (5%)

What have been the main benefits of implementing AI in your company?			
Increased operational efficiency	9 (82%)	10 (91%)	19 (86%)
Improved decision-making through data insights	3 (27%)	2 (18%)	5 (23%)
Enhanced customer experience	3 (27%)	1 (9%)	4 (18%)
Visibility	2 (18%)	1 (9%)	3 (14%)
Cost reduction	4 (36%)	1 (9%)	5 (23%)
Development of new products or services	3 (27%)	2 (18%)	5 (23%)
No significant benefits observed	1 (9%)	1 (9%)	2 (9%)
What have been the main negative outcomes observed following the implementation of AI in your company?			
Reduced transparency in decision-making processes	0 (0%)	0 (0%)	0 (0%)
Decreased employee engagement or job satisfaction	1 (9%)	0 (0%)	1 (5%)
Errors or biases in AI-generated outputs affecting business decisions	3 (27%)	6 (55%)	9 (41%)
Overdependence on automated systems, reducing critical human oversight	1 (9%)	3 (27%)	4 (18%)
Negative impact on organizational culture or collaboration	0 (0%)	0 (0%)	0 (0%)
Regulatory or compliance issues resulting from AI use	2 (18%)	1 (9%)	3 (14%)
No significant negative outcomes observed	7 (64%)	5 (45%)	12 (55%)
In which of the following areas is AI mostly used in your company?			
R&D	4 (36%)	4 (36%)	8 (36%)
Marketing	5 (45%)	5 (45%)	10 (45%)
Medical	5 (45%)	5 (45%)	10 (45%)
Market Access	11 (100%)	2 (18%)	13 (59%)
Legal	4 (36%)	0 (0%)	4 (18%)
Commercial	3 (27%)	4 (36%)	7 (32%)
Digital	4 (36%)	8 (73%)	12 (55%)
Manufacturing	4 (36%)	0 (0%)	4 (18%)

Table 4. Results for the questions administered only to respondents from companies that have not structurally implemented AI (n=28)

	AI implementation planned	AI implementation NOT planned	AI NOT implemented TOT
Which do you see as the main obstacles to AI implementation?	N (%) [17 tot]	N (%) [11 tot]	N (%) [28 tot]
Lack of internal expertise	14 (82%)	5 (45%)	19 (68%)
Legal and regulatory uncertainties	11 (65%)	6 (55%)	17 (61%)
High implementation costs	1 (6%)	2 (18%)	3 (11%)

Difficulties in data integration	8 (47%)	4 (36%)	12 (43%)
No significant obstacles	0 (0%)	4 (36%)	4 (14%)
I'm not sure	0 (0%)	1 (9%)	1 (4%)
Other...(lack of confidence in the output)	1 (6%)	0 (0%)	1 (4%)
How familiar are you with the potential applications of AI in pharmaceutical operations (e.g., R&D, Market Access, Medical Affairs, etc.)? Indicate it on a scale from 1 (not familiar at all) to 5 (extremely familiar).			
1	0 (0%)	1 (9%)	1 (4%)
2	5 (29%)	6 (55%)	11 (39%)
3	10 (59%)	3 (27%)	13 (46%)
4	2 (12%)	1 (9%)	3 (11%)
5	0 (0%)	0 (0%)	0 (0%)
Do you see potential value in using AI specifically within Market Access activities (e.g., pricing strategy, HTA submissions, stakeholder mapping)?			
Yes	16 (94%)	9 (82%)	25 (89%)
No	0 (0%)	0 (0%)	0 (0%)
I'm not sure	1 (6%)	2 (18%)	3 (11%)
Which of the following would most likely encourage your company to consider adopting AI in the future?			
Evidence of successful AI use cases in the pharmaceutical industry	14 (82%)	5 (45%)	19 (68%)
Clear regulatory guidelines for AI applications	10 (59%)	6 (55%)	16 (57%)
Availability of skilled AI professionals	6 (35%)	4 (36%)	10 (36%)
Access to high-quality data	10 (59%)	8 (73%)	18 (64%)
Lower implementation costs	3 (18%)	6 (55%)	9 (32%)
Partnerships with AI technology providers	7 (41%)	1 (9%)	8 (29%)
Internal strategic shift toward digital transformation	5 (29%)	5 (45%)	10 (36%)
Other...(Increasing quality and accuracy of AI output)	1 (6%)	0 (0%)	1 (4%)

Table 5. Questions administered only to respondents from companies that have structurally implemented AI in MA (n=11)

	AI implemented in MA
Which do you see as the main obstacles your company has faced in AI implementation in Market Access?	N (%) [11 tot]
Limited availability or quality of real-world data (RWD) for AI training	5 (45%)
Difficulty integrating AI tools with existing Market Access systems and processes	5 (45%)
Lack of internal expertise in both AI and Market Access domains	2 (18%)
Concerns about regulatory acceptance of AI-driven evidence or models	4 (36%)

Uncertainty about the ethical implications of AI in payer or HTA interactions	1 (9%)
Resistance from internal stakeholders to adopt AI-based approaches	2 (18%)
High cost of developing or acquiring tailored AI solutions for Market Access	2 (18%)
No significant challenges encountered	1 (9%)
Which are the main advantages your company has encountered in using AI in Market Access activities?	
Improved identification and prioritization of target markets and payers	5 (45%)
Enhanced pricing and reimbursement strategy through predictive analytics	5 (45%)
Faster generation of health economic and outcomes research (HEOR) models	3 (27%)
Greater efficiency in developing value dossiers and submissions	3 (27%)
Improved stakeholder engagement through AI-driven communication tools	2 (18%)
No significant benefits observed	3 (27%)
Which negative outcomes has your company experienced as a result of implementing AI in Market Access activities?	
Inaccurate or biased recommendations affecting pricing and reimbursement strategies	3 (27%)
Increased complexity in managing stakeholder relationships due to AI-driven processes	2 (18%)
Disruption of existing workflows and inefficiencies in team collaboration	3 (27%)
Reduced transparency in AI-generated insights used for decision-making	2 (18%)
Difficulty in justifying AI-driven models during regulatory or payer reviews	4 (36%)
Lower trust from healthcare professionals or payers due to AI involvement	1 (9%)
No significant negative outcomes observed	2 (18%)

Table 6. Questions administered only to respondents from companies that have structurally implemented AI, but NOT in MA (n=11)

	AI implemented NOT in MA
Does your company plan to implement the use of AI in Market Access in the next 12 months?	N (%) [11 tot]
Yes, significantly	3 (27%)
Yes, but in a limited way	3 (27%)
No	0 (0%)
I'm not sure	5 (45%)
Which are the key factors preventing the adoption of Artificial Intelligence in your company in Market Access activities?	
Lack of AI solutions tailored to health economics or HTA processes aligned with current reimbursement or tendering procedures	2 (18%)
Difficulty in accessing high-quality data for Market Access purposes	3 (27%)
Lack of internal capabilities to evaluate or manage AI tools in Market Access	1 (9%)
Perception that AI adds limited value compared to existing tools/methods	2 (18%)
Budget constraints specific to Market Access functions	1 (9%)

Internal skepticism or low trust in AI-driven decision-making	1 (9%)
Lack of successful case studies in Market Access to justify adoption	4 (36%)
Organizational silos: AI initiatives are driven by other departments (e.g., R&D, commercial)	1 (9%)
Other...	0 (0%)
Which do you see as the main obstacles your company anticipate facing in AI implementation in Market Access?	
Limited availability or quality of real-world data (RWD) for AI training	2 (18%)
Difficulty integrating AI tools with existing Market Access systems and processes	4 (36%)
Lack of internal expertise in both AI and Market Access domains	4 (36%)
Concerns about regulatory acceptance of AI-driven evidence or models	5 (45%)
Uncertainty about the ethical implications of AI in payer or HTA interactions	3 (27%)
Resistance from internal stakeholders to adopt AI-based approaches	1 (9%)
High cost of developing or acquiring tailored AI solutions for Market Access	0 (0%)
No significant challenges encountered	1 (9%)
Other...	0 (0%)

Table 7. Questions administered only to respondents from companies that plan to implement AI (n=17)

	AI implementation planned
Will AI implementation also target Market Access activities?	N (%) [17 tot]
Yes, significantly	3 (18%)
Yes, but in a limited way	12 (71%)
No	1 (6%)
I'm not sure	1 (6%)
Which are the main reasons your company is considering adopting AI?	
We believe AI will be a key driver of future innovation and competitiveness	16 (94%)
We want to stay aligned with industry trends and technological advancements	13 (76%)
We are generally proactive in adopting emerging technologies	4 (24%)
We see AI as essential for long-term strategic growth	11 (65%)
Our leadership strongly supports digital transformation initiatives	7 (41%)
We are exploring AI to enhance our company's image as an innovator	2 (12%)
We are responding to interest or pressure from partners, clients, or stakeholders	0 (0%)
Other...(Support in research; Productivity gains)	2 (12%)

Table 8. Questions administered only to respondents from companies that do not plan to implement AI (n=11)

	AI implementation NOT planned
Which are the main reasons your company is reluctant about AI implementation?	N (%) [11 tot]
Unclear return on investment (ROI)	1 (9%)
Budget limitations	6 (55%)
Regulatory or compliance concerns	4 (36%)
Low perceived relevance to current business needs	4 (36%)
Concerns about data privacy or security	6 (55%)
Organizational resistance to innovation	2 (18%)
Other...	0 (0%)