



## Managed Markets

### Managed Markets Headcount and Organization Study 2024/2025

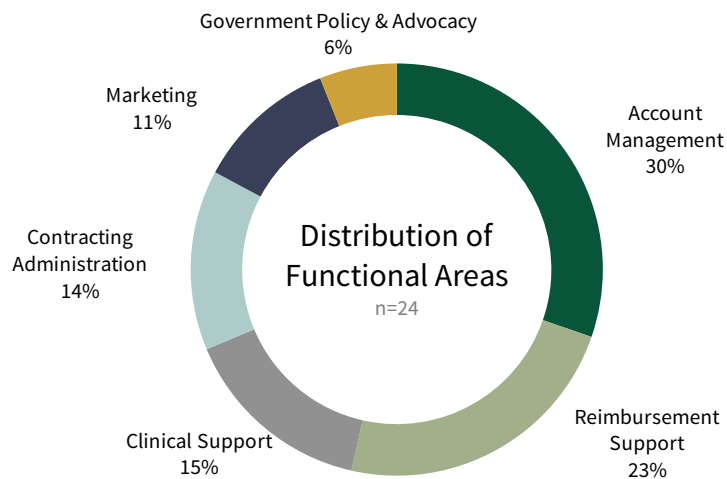
Pharmaceutical manufacturers continue to evolve managed markets staffing structures to meet customer needs as the market landscape changes due to continued consolidation and government policy changes. HIRC's report, *Managed Markets Headcount and Organization Study*, assists pharmaceutical manufacturers in understanding trends in headcount across very large, large, and mid-size firms. Select key findings include:

- Headcount across very large firms increased overall year-over-year due to growth in all functional areas in 2025.
- Account Management represents the largest portion of pharmaceutical manufacturer headcount and is comprised mainly of account managers covering organized provider accounts (43%), payer accounts (39%), and distribution channel accounts (18%).
- Clinical Support headcount increased by 10%, namely due to increases across Medical Science Liaison and HEOR/Outcomes Research/CER headcount.

**Key Finding:** Government Policy & Regulations account for about 42% of market trends with potential to limit access identified by pharmaceutical firms in 2024, followed by Utilization Management & Formulary Controls (18%), and Contracting (17%).

### Account Management and Reimbursement Staff Comprise Over Half of the Typical Managed Markets Organization

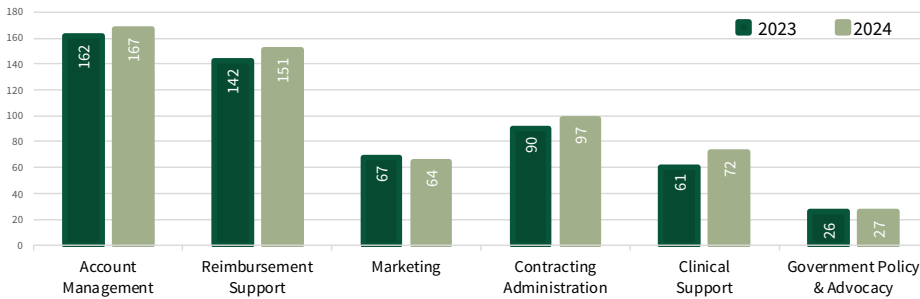
Pharmaceutical managed markets organizations are comprised mostly of Account Management and Reimbursement Support staff, together accounting for 53% of total managed markets personnel, followed by Clinical Support (15%), Contracting Administration (14%), Marketing (11%), and Government Policy & Advocacy (6%).



## Very Large Pharmaceutical Firms' Experience 5% Increase in Total Headcount Year-Over-Year

Very large pharmaceutical manufacturers (>\$18B U.S. Sales) increased from about 547 full time employees (FTEs) in 2023, to about 577 FTEs in 2024, or about a 5% increase year-over-year. Increases in very large firm headcount are observed in Clinical Support (+19%), followed by Contracting Administration (+8%), Reimbursement Support (+6%), Account Management (+3%), and Government Policy & Advocacy (+3%), while Marketing headcount decreased by about -3% in 2024.

**HEADCOUNT BY FUNCTIONAL AREA  
VERY LARGE FIRMS**



The Managed Markets Service provides strategic and tactical information, including customers' assessments of manufacturers' contracting and resources within four commercial and government market segments; market landscape trends and activity influencing the availability, price, and utilization of pharmaceuticals; managed markets headcounts and organizational trends based on confidential data from industry leading pharmaceutical companies; and the access and partnership landscape of key accounts.

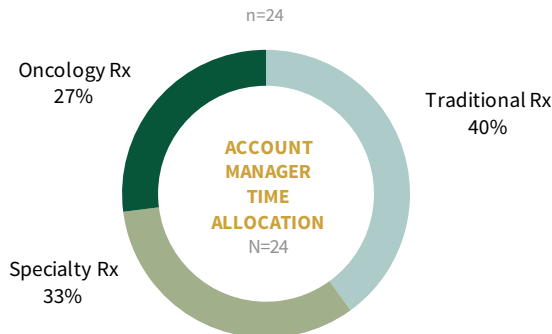


Josh Mader  
Vice President  
408-884-8560  
jmader@hirc.com

## Account Manager Allocation Across Medication Type, 2024

Panelists were asked to estimate Account Manager allocation across traditional, specialty, and oncology medications. In 2024, respondents indicate that about 40% of AM headcount are allocated to traditional medications, followed by 33% focusing on specialty pharmaceuticals, and 27% dedicated to oncology products. Additionally, very large firms report the highest percentage of AMs dedicated to oncology agents, while large firms report the highest percentage of AMs dedicated to traditional products.

**ACCOUNT MANAGER TIME ALLOCATION ACROSS PRODUCTS, 2024**



## Research Methodology and Report Availability

HIRC surveyed leading pharmaceutical companies during fall 2024 to gain insights concerning their managed markets headcount, organizational structures, and the key issues driving their staffing investments. Each company's data are privacy-protected, and results are only reported in aggregate to ensure confidentiality. The complete report, *Managed Markets Headcount and Organization Study*, is available now to HIRC's Managed Markets subscribers at [www.hirc.com](http://www.hirc.com).

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HEALTH INDUSTRIES RESEARCH CENTER (HIRC) is an independent, nonpartisan organization that conducts strategic market research on trends in health care, pharmaceuticals and managed care businesses. HIRC's benchmark studies focus on the marketing needs of pharmaceutical companies by providing research critical to the development of successful customer-focused marketing strategies.

224 Walnut Street, Suite C  
Santa Cruz, California 95060  
P: 408-884-8560 • F: 408-884-8561

[www.hirc.com](http://www.hirc.com)