The Complex, Shifting Nature of Brand Access in the Autoimmune Market

Effective brand strategies hinge on knowing where the market is today and where it is going in the future.

Today's autoimmune market, covering products for rheumatoid arthritis (RA), psoriasis, and psoriatic arthritis, is constantly evolving, fueled by market access stakeholders such as health plans, PBMs, specialty pharmacies, large dermatology and rheumatology medical groups, and accountable care organizations (ACOs). At the same time, the market is bracing for imminent shifts in payer-provider influence, as well as other trends (see Figure 1):

Figure 1
Keep Your Fingers on the Pulse of Your Market's Access Dynamics

In such an environment, it can be exceedingly difficult for brand marketers to develop market access strategies that will remain relevant even just a year or two into the future. Yet to protect the market access of their products, brand teams need to understand the shifting levels of influence of payers and providers, and how their relationships are likely to evolve in the next two years.

Understanding Stakeholder Management of the Autoimmune Market

To develop effective brand strategies, marketers need to recognize payers' and organized providers' evolving capabilities in managing physician and patient access. They also need to assess the specific tactics that key stakeholders will likely use to manage access to autoimmune products. These include reimbursement, restrictions, and management (see Figure 2).

Figure 2
Brand Access Equation

In the autoimmune market, payers are becoming more aggressive and relying on preferred drugs and step therapy to restrict access. In fact, nearly all plans have preferred drugs in these categories. In addition, more than three-quarters of health systems have established preferred drug lists for RA, psoriasis, and psoriatic arthritis. Medical groups have been slower to create preferred drug lists, but that will likely change as new performance measures that track prescribing patterns emerge (see Figure 3 page two).
KnowledgeEdge | Brand Access Marketplace Dynamics assesses the current and future access environment for your therapeutic market so you can identify opportunities and risks for your brand. The service answers questions such as:

- How do market access stakeholders influence access in your therapeutic market?
- How will market access stakeholder management and contracting for the brands in this therapeutic market evolve over the next two years?
- How are market access stakeholders responding to key market events in this therapeutic market?

To learn more, visit our website at www.healthstrategies.com/services/knowledgeedgebrand-access-marketplace-dynamics.