

# US Market Access – Key Considerations in a Changing Environment

Many life science manufacturers employ a payer size and control strategy in the US market. While this continues to be a viable model, changes in formulary and benefit design result in local-level access variation. This suggests that alternative strategic approaches are important to consider when manufacturers engage in market access planning.

## Key Findings

The employer shift to self-insured coverage and ensuing need for utilization management has resulted in both formulary and benefit design proliferation. The subsequent effect of these changes is variation in access on a geographic basis.

A geographic approach to access strategy may allow for more appropriate allocation of resources and be a viable strategic perspective for many brands (see Figure 1).

## Implications for Life Science Manufacturers

Evaluation and segmentation of geographic markets may uncover unexpected opportunities and provide a broader range of strategic options for life science brands.

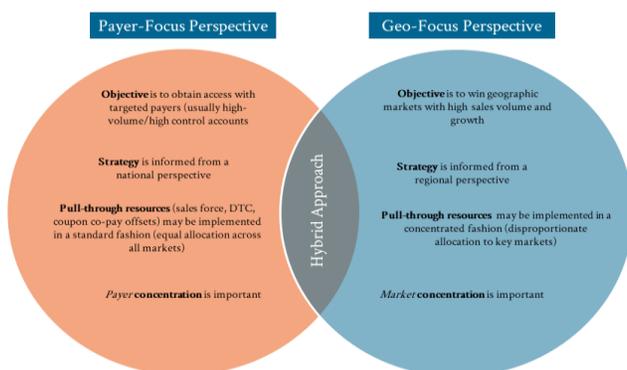


Figure 1: Market Access Strategy Options

Developing an understanding of geographic market archetypes may serve as a valuable framework for market access strategy discussions – a deeper understanding of both market volume and changes in market growth may inform alternatives to a payer size and control strategy (see figure 2).



Figure 2: Geographic Market Segmentation

Given that many manufacturers use payer size and control strategies, the geographic approach may also serve to differentiate a manufacturer’s strategic approach to access from standard industry practice.

## Conclusions / Action Steps

For commercially approved brands, a geographic access strategy may be used on an emergent basis to adapt access strategy based on market conditions.

In addition, it may be important to incorporate health outcomes and outcomes research data that is geographically customized to accurately inform brand opportunities to best serve appropriate patient populations.

In the case of pipeline assets which are not yet commercially available, the geographic access approach may be used deliberately to set strategy based on market assessment of the market and expected positioning of the asset vs. key competitors.