

Health & Disease Management Service

Leading Medication Compliance Partnerships—Fall 2011

Medication compliance is of critical importance to managed care executives because of the severity of the health outcomes, adverse events, and significant utilization and cost increases that result from non-compliance. HIRC's current research examines the scope and breadth of partnerships between health plans and pharmaceutical firms that strive to improve medication compliance. The *Medication Compliance Partnerships* report addresses the following questions:

- Which pharmaceutical companies offer the best medication compliance programs?
- What are the best practices in medication compliance?
- What disease states are highest priority for compliance?
- Which program components are most valued by customers?

Merck and GlaxoSmithKline provide the best medication compliance programs to their managed care customers.

Key Findings

Top five manufacturers account for 53% of best compliance programs

Merck, GlaxoSmithKline, Pfizer, Novartis and Novo Nordisk are most frequently recognized by HIRC panelists as providing the best medication compliance programs.

Merck leads all manufacturers in providing the best medication compliance programs with strong offerings in type 2 diabetes, immunizations, and asthma. Plans recognize Merck's engagement of the patient, provider, and specific components including online tools for caregivers and members, mail reminders, health coaching, and educating physicians on guideline adherence.

GlaxoSmithKline remains second with leading programs in asthma and COPD. Panelists note GSK's credible and unbranded materials, assistance with interactive compliance calls, and targeted online materials for case managers and coaches.

Top Five Manufacturers Providing the Best Medication Compliance Programs

Manufacturer	Disease State Most Often Cited
Merck	Diabetes / Immunizations
GlaxoSmithKline	Asthma
Pfizer	Smoking Cessation
Novartis	Hypertension
Novo Nordisk	Diabetes

Source: HIRC Health & Disease Management Service, Fall 2011, N=71.

About HIRC

Health Industries Research Companies (HIRC) conducts strategic market research on trends in health care, pharmaceuticals, and managed care businesses.



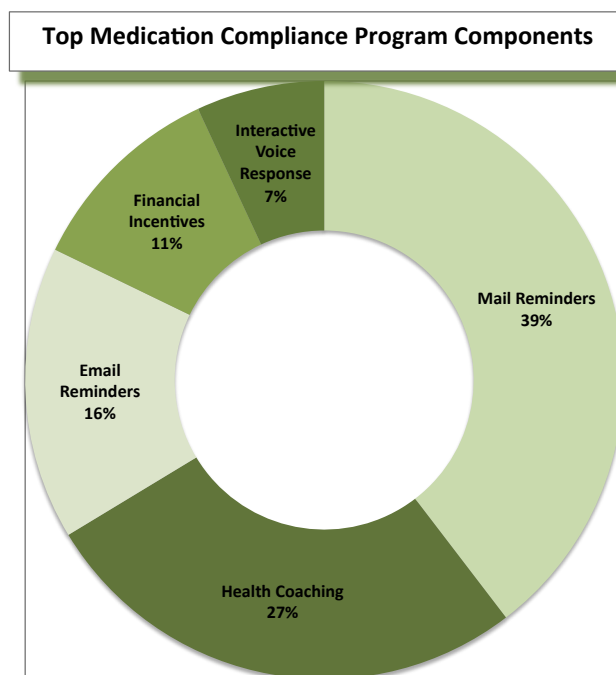
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Mail reminders remain the most utilized component of compliance programs

Pharmaceutical manufacturers utilize a variety of components when developing medication compliance programs, however 39% of all compliance programs provide mail reminders. Plans appreciate non-branded educational materials that can be mailed out directly to the patient as privacy issues and a lack of technology in the home can limit more technological efforts.

Health coaching is utilized in 27% of all compliance programs and most often utilized in type 1 and type 2 diabetes. Email reminders are the third most utilized component. Barriers include lack of access to technology in the home, in addition to privacy concerns.



Source: HIRC Health & Disease Management Service, Fall 2011, N=71.

Research Methodology and Report Availability

In August 2011, HIRC surveyed 71 quality managers, medical directors, and pharmacy directors from national and regional health plans. HIRC utilized a combination of quantitative surveys and 38 follow-up qualitative telephone interviews with panelists to gather information and insights.

The *Medication Compliance Partnerships* report is part of the *Health & Disease Management Service* and is now available to subscribers at www.hirc.com.

About HIRC's Health & Disease Management Service

The *Health and Disease Management Service* highlights health and disease management initiatives within significant managed care customer segments. This research provides benchmarking profiles of manufacturers' disease management program investment across commercial health plan and Medicare segments, an overview of specialty therapeutics disease management, patient-centered medical home, and accountable care organizations. In-depth case studies highlight the key components of disease management program collaborations between pharmaceutical manufacturers and health plans.

Research is conducted via extensive surveys and one-on-one interviews with health care industry executives across three customer markets:

- Health Plan Pharmacy Directors
- Health Plan Medical Directors
- Health Plan Quality Managers

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