

Health & Disease Management Service

High Priority Disease State Partnerships 2011

HIRC's current research with managed care executives identifies high priority disease states that are targeted for disease management program partnerships with leading pharmaceutical manufacturers. This relevant research presents benchmarking trends in program activity, key areas of concern, and leading pharmaceutical company partners. Additionally the report highlights oncology DM and health and wellness trends. The *Disease State Profiles* update provides in-depth profiles of 20 therapeutic areas with each profile containing the following disease-specific information:

- How has manufacturer investment in DM program offerings changed over the past three years?
- What are key components to manufacturer supported DM?
- What are the potential benefits to health plans that partner with manufacturers for DM support?

Novo Nordisk, Merck, GSK, and Lilly provide the most disease management support for high priority disease states. Educational materials and case management are the most valuable components for DM programs.

Key Findings

Diabetes, asthma, and cardiovascular continue to be highest priority for DM

Manufacturers continue to invest in and support diabetes, asthma, hypertension, and hyperlipidemia DM programs to ensure access and compliance for their branded products.

About HIRC

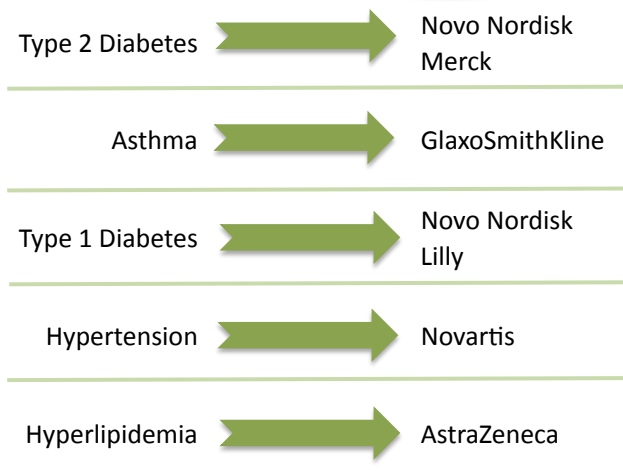
Health Industries Research Companies (HIRC) conducts strategic market research on trends in health care, pharmaceuticals, and managed care businesses.



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Leading Disease States and Partners



n= 111 respondents.

Novo Nordisk is recognized for being a partner in type 2 diabetes with inclusive, customizable DM program offerings, a wealth of educational materials, NCQA accreditation, and diabetes educators.

Merck supports type 2 diabetes with training programs that include speakers, diabetes educators, educational materials, treatment guideline updates, compliance, and rebate incentives.

GlaxoSmithKline is praised for its asthma DM programs that include easily accessible information, unbranded patient and physician educational materials, appropriate use of controller medications, compliance, NCQA assistance, and asthma action plans.

Health plans are most interested in patient education and case management DM support

Most HIRC health plan panelists believe DM support from pharmaceutical firms can help manage high priority disease states. Educational materials and case management are the most sought after DM components.

What elements are health plans looking for to help better manage high priority disease states?

- 1.* Patient Education
- 1.* Case Management
3. Physician Education
4. Easy to Read Materials
- 5.* Non-branded Information
- 5.* Compliance Programs
- 5.* Preventative Screening

* = tie.
from qualitative interviews n= 37.

Research Methodology and Report Availability

In January 2011, HIRC surveyed 111 panelists from four managed care markets and conducted one-on-one follow-up interviews with a subset of 48 respondents to gather ratings and qualitative information.

The *Disease Profiles* report is part of the *Health & Disease Management Service* and is now available to subscribers at www.hirc.com. Other spring 2011 updates to the *Health & Disease Management Service* include:

- Impact of health care reform on manufacturer DM investment
- DM program opportunities by market
- Role of DM in accountable care organizations

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 four customer markets:

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

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