

HIRC

Health Industries Research Companies

303 Potrero Street #42-305
Santa Cruz, California 95060
PHONE 831.426.5283
FACSIMILE 831.426.1549
www.hirc.com

MEDICARE DISEASE MANAGEMENT OPPORTUNITIES SPRING 2008

Health Industries Research Companies' (HIRC) *Health and Disease Management Service* surveyed 39 Medicare executives, comprised of HMO pharmacy directors and medical directors regarding disease management program and Medication Therapy Management offerings from pharmaceutical manufacturers. Patient education, appropriate drug utilization and patient drug compliance are the three leading areas of program interest. Pfizer, GlaxoSmithKline and Novo Nordisk lead for quantity and quality of program offerings.

Interest in Medicare Program Support

The majority of Medicare panelists indicated High or Medium interest in support for one or more components of MTM programs. The five highest rated program components are:

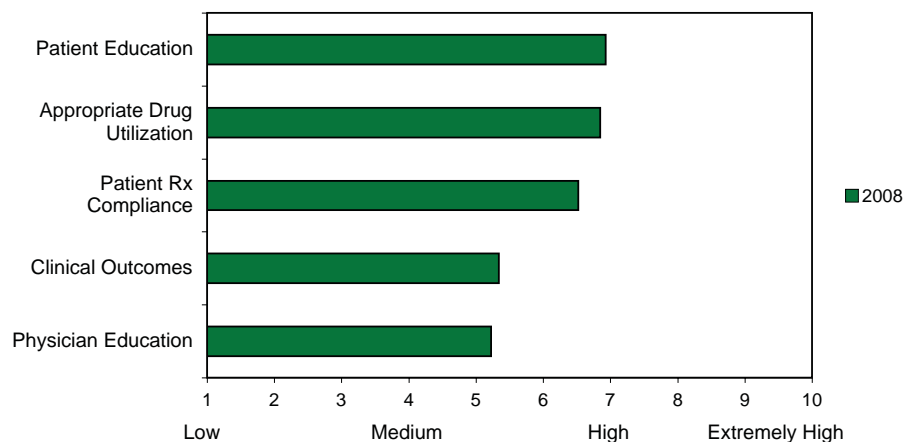
- Patient Education
- Appropriate Utilization
- Patient Compliance
- Clinical Outcomes
- Physician Education.

ABOUT HIRC

HEALTH INDUSTRIES RESEARCH COMPANIES (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, providing research critical to the development of successful marketing strategies.

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Level of Interest in Pharma Support for Top Five MTM Program Components



Source: HIRC *Health & Disease Management Service*, Spring 2008, N = 39 Medicare Executives.

ABOUT THE HEALTH AND DISEASE MANAGEMENT SERVICE

The Health and Disease Management Service features benchmarking profiles of pharmaceutical manufacturer programs and investment across key customer channels.

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

- ◆ HMO Pharmacy Directors
- ◆ HMO Medical Directors
- ◆ HMO Quality Managers
- ◆ Medicare Advantage and PDPs
- ◆ Employer Health Care Coalitions

CONTACT INFORMATION

Karen Ernst
 Director, Health and Disease Management Service

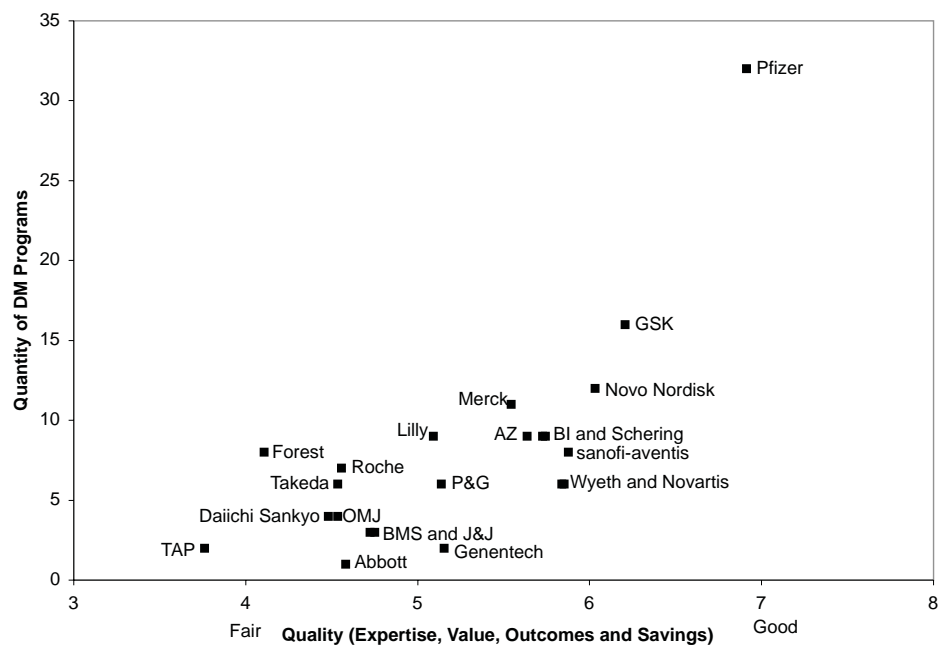
610.888.9417

kernst@hirc.com

Manufacturer Offerings

Pfizer, GlaxoSmithKline and Novo Nordisk lead manufacturers as the best companies for providing DM programs for Medicare populations. These three firms have the greatest number of DM program mentions by the Medicare DM panel, and are rated highest for their DM expertise, value, outcomes and savings,

Quantitative vs Qualitative Assessment of Manufacturer Offerings



Source: HIRC Health & Disease Management Service. N = 39 Medicare survey panelists, Spring 2008.

Research Methodology & Report Availability

From January to February 2008, the *Health and Disease Management Service* surveyed 39 HMO Pharmacy Directors, 29 HMO Medical Directors, 20 HMO Quality Managers and 39 Medicare Executives. In addition to the program metrics highlighted in this document, the following information is available to *Health and Disease Management Service* subscribers:

- ◆ Manufacturer profiles
- ◆ Disease management ratings across five market sectors
- ◆ Program and manufacturer profiles

The complete report on Medicare disease management is now available to subscribers of the *Health and Disease Management Service* online at www.hirc.com.