



Employers & Coalitions Service

Employers' Disease Perspectives, Priorities & Programs – 2011

As employers continue to grapple with rising health care costs and a challenging economic environment, many are increasing their efforts to target specific diseases or health conditions that are responsible for significant portions of their employees' overall health care expenses. HIRC's update, *Employers' Disease Perspectives and Profiles*, addresses the following questions:

- Which disease states are of highest concern to employers?
- Which disease states have the most impact on direct and indirect costs?
- What type of health management initiatives are most valued by employers?
- What level of interest do employers have in better managing specific disease areas? Which pharmaceutical firms are partnering with employers on disease-specific initiatives?

Key Findings

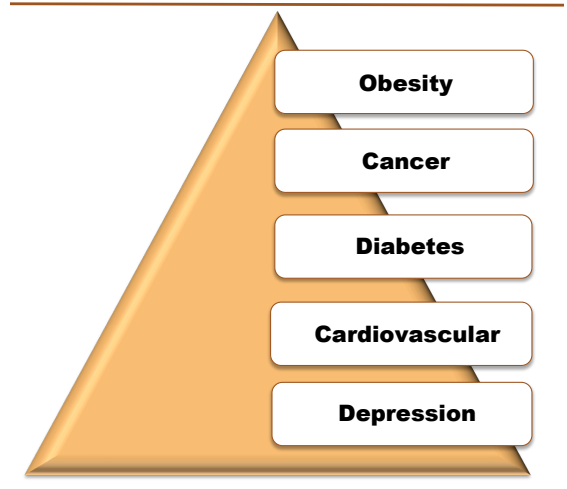
Employers' level of interest in, and concern about, cancer and obesity has grown significantly in the past year, and many employers are seeking partners to assist them in better managing these conditions.

Employers are Most Concerned with Impact of Obesity, Cancer, and Diabetes

Employers are concerned about obesity, cancer, and diabetes because they have the greatest impact on employers' direct and indirect health benefits costs. The chronic nature and prevalence of these conditions heightens employers' commitment to their more effective management and ultimate prevention.

- Obesity is increasingly an area of concern for employers as it is seen as the underlying cause of many other costly conditions (e.g., diabetes, hypertension, high cholesterol, and musculoskeletal conditions).
- Employers' concerns about cancer are increasing as treatment costs rise, new medications become available, and patients live longer.
- New diabetes diagnoses have continued to grow at an exponential rate causing diabetes to remain in the top three areas of concern.

Top Health Conditions of Concern For Employers



n=124.

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 Pharmaceutical Companies are Supporting Employers' Disease-Focused Initiatives

The table below highlights which diseases are most frequently targeted by pharmaceutical companies for disease-focused health management programs with employers. Additional insights into employer-pharmaceutical firm partnerships are explored in HIRC's update, *Employers' Disease Perspectives and Profiles*.

Top Diseases Targeted by Employer Health Management Programs & Pharmaceutical Firms		
Rank	Disease State	Leading Pharmaceutical Partners
1	Diabetes (Type 1 & Type 2)	sanofi-aventis, Merck, Novo Nordisk, Pfizer
2	Smoking Cessation	Pfizer
3	High Cholesterol	AstraZeneca, Merck
4	High Blood Pressure	Novartis
5	COPD	Boehringer Ingelheim

n=124

In-Depth Disease Profiles Highlight Employers' Concerns and Health Management Activity

HIRC's disease state profiles provide pharmaceutical companies with broad-based insights into employers' perspectives on some of the most prevalent and costly disease states. Each profile contains employers' assessments of interest in future health management programs, the disease's impact on productivity, medical and pharmacy costs, as well as details on current health initiatives. The following disease states are profiled in the *Employers' Disease Perspectives and Profiles* update

- Acute Coronary Syndrome
- Asthma
- Cancer
- COPD
- Depression
- Diabetes Type 1 & 2
- Hyperlipidemia
- Hypertension
- Musculoskeletal
- Obesity
- Smoking Cessation
- Women's Health

Research Methodology & Report Availability

Research was conducted in spring 2011 with 124 employer market panelists representing over seven million active employees. Information was gathered from employee benefits managers, corporate medical departments, and employer health care coalitions via mail and online surveys. A subset of respondents participated in follow-up interviews.

Subscribers to the *Employers & Coalitions Service* may download the complete report, *Employers' Disease Perspectives and Profiles* at www.hirc.com.

About HIRC's Employers & Coalitions Service

The *Employers & Coalitions Service* is an ongoing research project that focuses on key influencers within the employer health care market and their impact on the use of pharmaceutical products. The service includes health and drug benefits trends and strategies; profiles of pharmaceutical firms investing in the employer market; specialty medication trends; and employers' perspectives on the impact and management of specific diseases.

Research is conducted annually with the following three panels:

- Employee Benefits Managers
- Corporate Medical Departments
- Health Care Coalitions

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