



Managed Markets & National Accounts Service

Retail Drug Chain Research— Spring 2011

Retail Chains Look to MTM Programs as Source of Revenue

Retail Drug Chain executives voice very strong interest in manufacturers' support for disease management and MTM programs.

More than half of RDC panelists report they are currently being reimbursed directly by both Medicare and commercial health plans for MTM services, including Humana, MemberHealth (UAFC) and Aetna. The majority of panelists utilize turnkey platforms from intermediaries such as Mirixa and Outcomes for their MTM programs.

Top Manufacturer Programs/Resources of Interest to Retail Drug Chains

Patient Compliance Programs

DM Support

MTM Program Support

RDC panelists are hopeful that health care reform will bring increased reimbursement in the future for non-dispensing services provided by retailers, such as MTM.

About HIRC

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



HIRC

519 Seabright Ave, Suite 211
Santa Cruz, CA 95062

www.hirc.com

Drug Chains Report New GSK Field Force Focused on Retail Pharmacy

RDC panelists report that GSK has substantially increased its focus on and commitment to the retail market, adding more than 90 field-based personnel, "CPTs, Community Pharmacy Team, committed primarily to visiting with and detailing pharmacists".

"They [GSK] have a program going on where they're hiring a bunch of pharmacists that are going to call on pharmacies and increase Glaxo's presence in the retail world."

"They [GSK] have about 120 salesmen in the United States now who are working on nothing but MTM and market share programs, trying to develop a niche."

GSK and Boehringer Ingelheim #1 Overall, BI is Top "Partner of Choice"

Retail Drug Chain panelists rated manufacturers on quality of account managers and value of programs/resources. When these two rating parameters are combined, BI and GSK were tied for #1 overall. BI and GSK received similar ratings on both metrics and are positioned almost identically on the RDC perceptual map.

Retail Drug Chain executives rated GSK highest in quality of account managers, followed by BI, Novartis and Pfizer. Panelists say these highly regarded AMs are responsive and flexible, provide timely decisions on customer support, understand the retail business segment and are seen as strong advocates for their customers.

Novartis was rated highest by RDCs on value of programs and resources, and is cited for their excellent patient education and compliance programs, particularly in hypertension.

The majority of manufacturers suffered declines in program scores in 2011, though both Novartis and GSK enjoyed increases in program ratings by RDC executives.

Boehringer Ingelheim was selected most often as RDC Executives' "Partner of Choice", followed by Pfizer.

About HIRC's Managed Markets & National Accounts Service

Managed Markets and National Accounts is the most comprehensive research service available to help pharmaceutical firms assess performance and stay abreast of trends within a multitude of managed care, government and institutional markets. Surveys and interviews conducted with:

- *Health Plan Pharmacy Dir.*
- *Health Plan Medical Dir.*
- *PBM's*
- *Medicare PDPs*
- *Medicaid MCOs*
- *State Medicaid Directors*
- *Specialty Pharmacies*
- *LTC Consultant Pharmacists*
- *Hospital Pharmacists*
- *Retail Drug Chains*

Key reports include:

- *Ratings of Manufacturers on Contracting & Programs*
- *Customer Needs Assessment*
- *Pharma's Ratings of Customers*
- *Market Segment Situation Analyses*
- *Future Scenarios*
- *Headcounts & Organizations*

Contact Information

Dorothy Hess
VP, MMNA Research
215.517.6860
dhess@hirc.com

Top Manufacturers — Retail Drug Chains

Best Quality of Account Managers	Best in Programs/ Resources	Partner of Choice
GlaxoSmithKline	Novartis	Boehringer Ingelheim

Report Methodology and Availability

HIRC's Retail Drug Chain research was conducted in the first quarter of 2011 through a combination of 19 surveys and 12 in-depth interviews with executives from key retail drug chains. The complete findings are outlined in Chapter VI of the Spring Managed Markets & National Accounts Handbook, which is available to subscribers at www.hirc.com.