



Managed Markets

Key Accounts: Access and Partnership Landscape

Customers' ability to limit brand access and willingness to partner with pharmaceutical manufacturers varies by company size, strategy, and management philosophy. An understanding of the access and partnership landscape for key accounts is critical for effective account planning and strategy development. HIRC's report, *Access and Partnership Landscape*, provides manufacturer ratings of select customers' ability to limit brand access and willingness to partner. The report addresses the following questions:

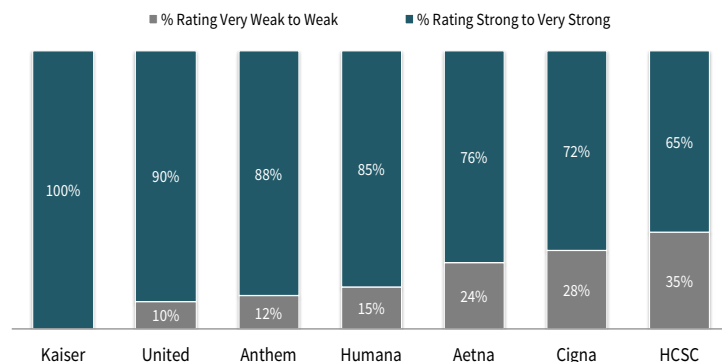
- Which commercial, Medicare Advantage, Medicaid MCO, PBM, and IDN accounts are rated by manufacturers as most able to limit brand access? Why?
- Which commercial, Medicare Advantage, Medicaid MCO, PBM, and IDN accounts are rated by manufacturers as most willing to partner? Why?
- What are the key characteristics of firms with a strong ability to limit brand access?
- What are the key characteristics of firms that are the most willing to partner?

Key Finding: Commercial health plans rated high in ability to limit brand access are typically characterized by a closed system, tight control/restriction, and a willingness to disadvantage or lock out products.

Kaiser Rates Highest in Ability to Limit Brand Access in the Commercial Health Plan Segment

HIRC queried managed markets professionals from leading pharmaceutical firms to determine which key commercial accounts have the strongest ability to limit brand access and which are most willing to partner with manufacturers. Respondents were asked to consider leading accounts in commercial, Medicare Advantage, Medicaid MCO, PBM, and IDN segments.

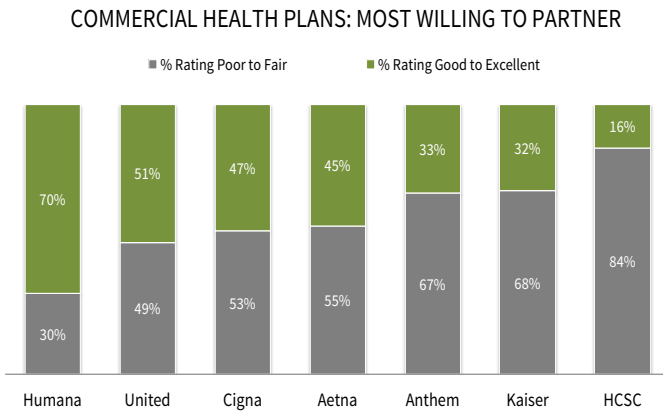
COMMERCIAL HEALTH PLANS: ABILITY TO LIMIT BRAND ACCESS



In the commercial health plan segment, **Kaiser** maintains a strong lead in their ability to limit brand access, receiving strong to very strong ratings from 100% of respondents. The firm is noted for its closed system's strong ability to lockout product access.

Humana Rates Highest in Willingness to Partner in the Commercial Health Plan Segment

Accounts demonstrating a high ability to limit access and a high willingness to partner provide manufacturers the opportunity to maximize access through program incentives aligned with the challenges and needs of the account. Humana is an example of a firm that rates highly in both ability to limit brand access and willingness to partner with pharmaceutical firms in the commercial health plan segment.



Humana and **UnitedHealthcare** are noted for their openness to innovative ideas and willingness to explore new approaches.

The full report, *Access and Partnership Landscape*, provides manufacturer ratings of customers' ability to limit brand access and willingness to partner, as well as the factors driving ratings for the following key accounts:

- **Commercial Health Plans:** Aetna, Anthem, Cigna, HCSC, Humana, Kaiser, and UnitedHealthcare.
- **Medicare Advantage Plans:** Aetna, Anthem, BCBS MI, Cigna, Humana, Kaiser, and UnitedHealthcare.
- **Medicaid MCOs:** Aetna, Anthem, Centene, LA Care, Molina, UnitedHealthcare, and WellCare
- **Pharmacy Benefit Managers:** CVS, Express Scripts, Humana, MagellanRx, MedImpact, OptumRx, and Prime
- **Integrated Delivery Networks:** Geisinger, HealthPartners, Henry Ford, Intermountain, Providence St. Joseph Health, Spectrum Health, and UPMC

Research Methodology and Report Availability

In April, HIRC surveyed 80 respondents at 35 pharmaceutical firms. Online surveys were used to gather quantitative and qualitative information. The complete report, *Access and Partnership Landscape*, is available now to HIRC's Managed Markets and National Accounts subscribers at www.hirc.com.

The **Managed Markets Service** provides strategic and tactical information, including customers' assessments of manufacturers' contracting and resources within four commercial and government market segments; market landscape trends and activity influencing the availability, price, and utilization of pharmaceuticals; managed markets headcounts and organizational trends based on confidential data from industry leading pharmaceutical companies; and the access and partnership landscape of key accounts.



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HEALTH INDUSTRIES RESEARCH CENTER (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 by providing research critical to the development of successful customer-focused marketing strategies.

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