



Special Report Series: COVID-19 Pandemic Impact

Impact of COVID-19 on Pharmaceutical Firms' Access to and Interaction with Key Customers

The COVID-19 pandemic has had a tremendous global impact, changing the way that we conduct our personal and professional lives. As the healthcare industry works to modify its business operations in response to the outbreak, access to managed markets and channel customers is markedly different. HIRC's report, *Impact of COVID-19 on Pharmaceutical Manufacturers' Access to and Interaction with Key Customers*, examines pharmaceutical firms' challenges in key account access and the virtual engagement landscape. The report addresses the following questions:

- Which key customers have been most challenging to access during the COVID-19 pandemic? Which key customers have been most flexible in providing access?
- What types of virtual support methods are manufacturers utilizing to maintain relationship continuity with key account decision-makers?
- What types of discussions continue to occur in virtual meetings? What have been the challenges and benefits of virtual meetings with key accounts?
- Which pharmaceutical manufacturer role types (e.g., account managers, MSLs, reimbursement, HEOR) are most frequently gaining access to customers?
- What are customers' greatest business concerns amid the COVID-19 pandemic? What are the potential long-term changes to customer interactions?

Key Finding: Integrated delivery networks have been the most challenging to access during the COVID-19 pandemic; videoconferencing and email is being utilized most often to support key accounts in place of face-to-face contact.

Pharmaceutical Firms Most Successful in Securing Virtual Meetings with Health Plans and PBMs

The vast majority of pharmaceutical manufacturers report that they've been able to schedule virtual meetings with commercial health plans (89%) and PBMs (83%). Three-quarters (76%) have been able to schedule meetings with specialty pharmacy providers, while less than half (47%) have been successful in securing virtual meetings with integrated delivery network customers.

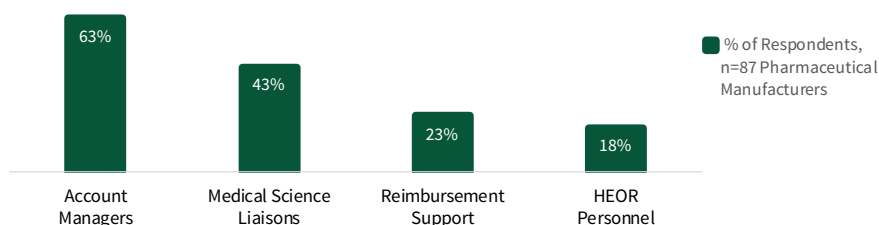
Have you been able to schedule virtual meetings with the following customer segments?



Pharmaceutical Manufacturer Account Managers Most Often Gaining Access to KDMs During COVID-19

Nearly two-thirds of survey respondents (63%) indicate that account managers have been able to gain access to key decision-makers within managed markets and channel accounts, followed by MSLs (43%). Less customer access is reported for reimbursement support and HEOR personnel. Contract negotiations and supply chain and drug shortage issues are most often being discussed via virtual meetings between pharmaceutical manufacturers and key customers during this time.

Which role(s) within your organization are getting access to managed markets customers?



The full report provides customer access variations by Very Large, Large, and Mid-size manufacturers and reviews the access landscape for the following key accounts:

- **Commercial Health Plans:** Aetna, Anthem, Centene, Cigna, HCSC, Kaiser, United Healthcare
- **Pharmacy Benefit Managers:** CVS Health, Express Scripts, IngenioRx, Humana Pharmacy Solutions, MedImpact, OptumRx, Prime Therapeutics
- **Integrated Delivery Networks:** Ascension, Commonspirit Health, Geisinger, Kaiser, Providence St. Joseph Health, Sutter Health, UPMC
- **Specialty Pharmacy Providers:** CVS Specialty/Aetna Specialty, Accredo (ESI)/Cigna Specialty, AllianceRx Walgreens Prime, OptumRx Specialty Pharmacy, Humana Specialty Pharmacy, Kroger Specialty Pharmacy

Research Methodology and Report Availability

HIRC surveyed leading pharmaceutical companies in April 2020 to gain insights into changes to customer access amid the COVID-19 pandemic. In total, 87 pharmaceutical manufacturer respondents were surveyed representing 38 firms, spanning Very Large, Large, and Mid-size cohorts. The complete report, *Impact of COVID-19 on Pharmaceutical Manufacturers' Access to and Interaction with Key Customers*, is available now to subscribers at www.hirc.com.

The COVID-19 Special Report Series consists of two reports, one from the perspective of pharmaceutical manufacturers on customer access and the other from the perspective of managed markets and channel customers on how the COVID-19 has impacted their business, as well as evaluations of pharmaceutical firms in virtual account support. To subscribe, please contact:



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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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