



Managed Markets

Access and Partnership Landscape: Commercial Health Plans

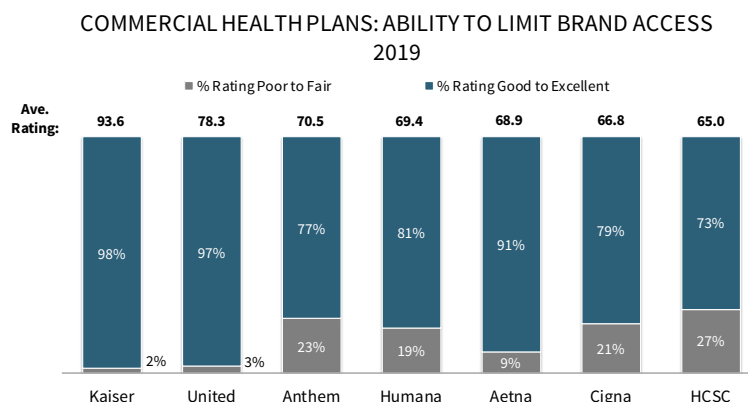
As merger and acquisition activity continues in the commercial health plan segment, an understanding of the access and partnership landscape is critical for effective account planning and strategy development. HIRC's report, *Market Access and Partnership Landscape*, includes manufacturer ratings of select commercial health plans' ability to limit brand access and willingness to partner. The report addresses the following questions:

- Which commercial health plans are rated by manufacturers as most able to limit brand access? Why?
- What are the key characteristics of commercial health plans with a strong ability to limit brand access?
- Which commercial health plans are rated by manufacturers as most willing to partner? Why?
- What are the key characteristics of commercial health plans 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, having strong control over providers, and a willingness to lockout products.

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

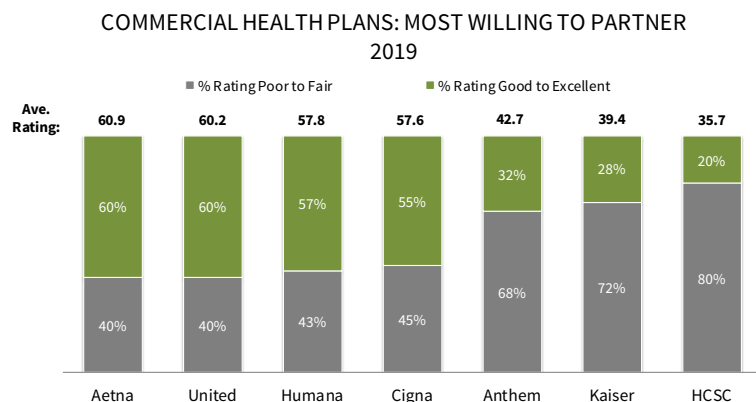
HIRC queried managed markets professionals from leading pharmaceutical firms to determine which key commercial accounts have the strongest ability to limit brand access and which are most willing to partner with manufacturers. Respondents were asked to consider leading accounts in commercial, PBM, Medicare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



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 98% of respondents.

Aetna and United Rate 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 the opportunity to maximize access through program incentives aligned with the challenges and needs of the account. **United** 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.



In addition to the commercial health plan market access and partnership landscape, the full report provides an overview of the access and partnership landscape across the following market segments:

- Pharmacy Benefit Managers
- Medicare Advantage Plans
- Medicaid Managed Care Organizations

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.



Josh Mader
Vice President
408-884-8560
jmader@hirc.com



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.

16 Lyndon Avenue, Suite 101
Los Gatos, California 95030
P: 408-884-8560 • F: 408-884-8561

www.hirc.com

Research Methodology and Report Availability

In January 2019, HIRC surveyed 62 respondents from 33 pharmaceutical firms. Online surveys were used to gather information. The complete report, *Market Access and Partnership Landscape*, is available now to HIRC's Managed Markets subscribers at www.hirc.com.