



Managed Markets

Key Medicaid MCO Accounts: Market Access and Partnership Landscape 2018

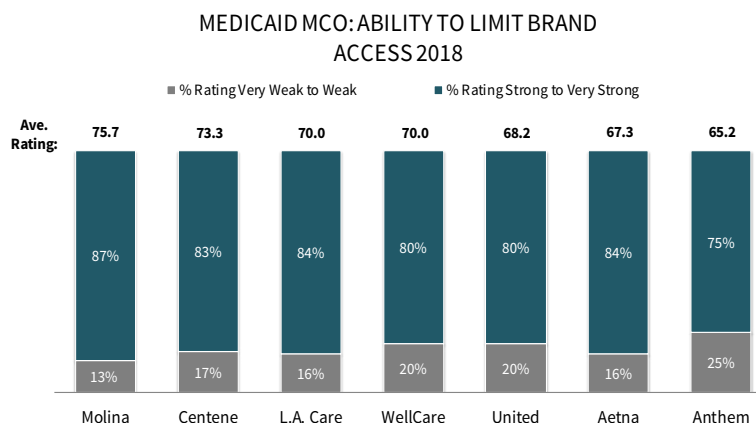
Customers' ability to limit brand access and willingness to partner with pharmaceutical manufacturers varies by company size, strategy, and management philosophy. An understanding of the access and partnership landscape for key accounts is critical for effective account planning and strategy development. HIRC's report, *Medicaid MCOs: Market Landscape and Strategic Imperatives*, includes manufacturer ratings of select managed care organizations' ability to limit brand access and willingness to partner. The report addresses the following questions:

- Which Medicaid managed care organizations (MCOs) are rated by manufacturers as most able to limit brand access? Why?
- Which Medicaid MCOs are rated by manufacturers as most willing to partner? Why?
- What are the key characteristics of MCOs with a strong ability to limit brand access?
- What are the key characteristics of MCOs that are the most willing to partner?

Key Finding: Medicaid MCOs rated high in ability to limit brand access are characterized by restrictiveness, limited access to decision-makers, and strong negotiation leverage due to size/market share.

Molina Rates Highest in Ability to Limit Brand Access in the Medicaid MCO Segment

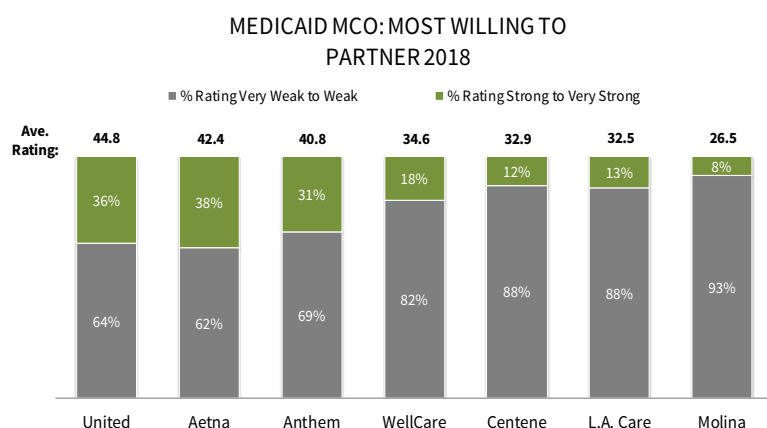
HIRC queried managed markets professionals from leading pharmaceutical firms to determine which key Medicaid MCO accounts have the strongest ability to limit brand access and which are most willing to partner with manufacturers. Respondents were asked to consider leading accounts in commercial, Medicare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



In the Medicaid MCO segment, **Molina** maintains a strong lead in their ability to limit brand access, receiving strong to very strong ratings from 87% of respondents.

United Rates Highest in Willingness to Partner in the Medicaid MCO 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. **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 Medicaid MCO segment. **United** and **Aetna** are noted for their open and flexible predisposition among leadership and willingness to explore partnerships in data analytics and research.



In addition to insights into the Medicaid MCO market access and partnership landscape, the report provides an overview of key Medicaid MCOs and recent market activity, and examines leading Medicaid MCOs' strategic imperatives, operational objectives, and top priorities for management by therapeutic area.

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

Research Methodology and Report Availability

In July, HIRC surveyed 64 respondents at 32 pharmaceutical firms. Online surveys were used to gather quantitative and qualitative information. The complete report is available in the appendix of *Medicaid MCOs: Market Landscape and Strategic Imperatives* report and is available now to HIRC's Managed Markets subscribers at www.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