



## Managed Markets

### Key Medicare Advantage Plan Accounts: Market Access and Partnership Landscape 2018

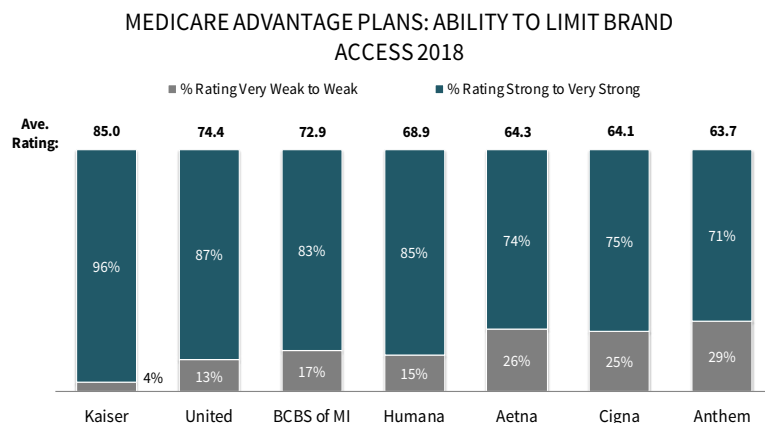
Customers' ability to limit brand access and willingness to partner with pharmaceutical manufacturers varies by company size, strategy, and management philosophy. An understanding of the access and partnership landscape for key accounts is critical for effective account planning and strategy development.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

- Which Medicare Advantage plans are rated by manufacturers as most able to limit brand access? Why?
- Which Medicare Advantage plans are rated by manufacturers as most willing to partner? Why?
- What are the key characteristics of plans with a strong ability to limit brand access?
- What are the key characteristics of plans that are the most willing to partner?

**Key Finding:** Medicare plans rated high in ability to limit brand access are typically characterized by restrictiveness, control over providers, and use of aggressive UM to drive formulary performance.

### Kaiser Rates Highest in Ability to Limit Brand Access in the Medicare Advantage Segment

HIRC queried managed markets professionals from leading pharmaceutical firms to determine which key Medicare Advantage 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.

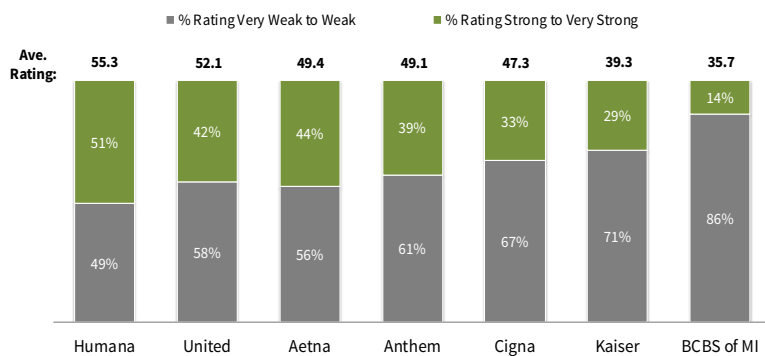


In the Medicare Advantage segment, **Kaiser** maintains a strong lead in their ability to limit brand access, receiving strong to very strong ratings from 96% of respondents.

## Humana Rates Highest in Willingness to Partner in the Medicare Advantage 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 Medicare Advantage segment. **Humana** and **United** are noted for their open and flexible predisposition among leadership and willingness to explore new mutually beneficial opportunities.

MEDICARE ADVANTAGE PLANS: MOST WILLING TO PARTNER 2018



In addition to insights into the Medicare Advantage market access and partnership landscape, the report provides an overview of key Medicare Advantage plans and recent market activity, and examines leading Medicare Advantage plans' 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.



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## 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 *Medicare Advantage Plans: Market Landscape and Strategic Imperatives* report and is available now to HIRC's Managed Markets subscribers at [www.hirc.com](http://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.

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