

Employer Market Intelligence (EMI) Service

2025 Research Overview



Gallagher's syndicated Employer Market Intelligence (EMI) Service helps biopharmaceutical, diagnostic and digital health firms understand the marketplace influence of jumbo employers (5,000+ U.S. Employees) as healthcare purchasers. This includes their role in driving innovative solutions and the impact on medication and product access.

20+ Years of Employer Research Focused on:

- » Jumbo Employers
- » Employer Health Coalitions
- » Employer Advisors

EMI SERVICE DELIVERABLES

Employer & Coalition Profiles Databases *(Spring)*



Organization-level details on jumbo employers' and leading employer coalitions' benefit design, obesity/ GLP-1 coverage dynamics, vendor partnerships, workforce demographics and willingness to innovate.

Employer Market Trends Report *(Summer)*



Assessment of employer-market health and pharmacy management trends, including topics such as GLP-1s for obesity, biologics & biosimilars, formulary decisions, tech-driven solutions and disease focus areas.

Special Report: Employer-PBM Market Shifts *(Fall)*



Examination of employers' evolving attitudes on traditional pharmacy benefit contracts, their threshold for adopting new solutions and how shifts may impact access to pharmaceutical products and services.

The EMI Service equips subscribers with the insights necessary to showcase their product value propositions in ways that resonate with employer and coalition decision makers. Report implications fuel strategy development and formulation of employer calls-to-action.

Each deliverable is built around findings from comprehensive employer and coalition surveys and supplemental interviews with key stakeholders. Subscribers receive organization-wide access to reports, customized presentations and consultant inquiry and data query privileges.

Employer & Coalition Profiles Databases

(March 2025)



The Profiles Databases includes details on nearly 200 jumbo employers and employer health coalitions in a user-friendly Excel format. Data is collected directly from benefits decision makers and includes workforce demographics, health and pharmacy benefits, decision making and priorities, and interest in manufacturer collaboration.

160+ Jumbo Employer Profiles Include:

- Health & Rx Benefit Design, including Pharmacy Contracting Models
- GLP-1 for Obesity Coverage Criteria
- Lifestyle/Behavior Modification Programs to Lose Weight
- Point Solution Offerings
- Biologics & Biosimilars Management
- PBM, SPM, Health Plan & EBC Vendors
- Health Insurance Profiles
- Top Priority Disease States
- Importance of Preventive Care Resources
- Segmentation Positioning for Targeting
- Interest in Working with Biopharma
- Worksite-Based Health Clinic Offerings
- Workforce Demographics, such as Covered Lives, Average Age, Gender, Unionization, Tenure & Top 3 Workforce Locations

30+ Employer Coalition Profiles Include:

- Top Coalition Priorities & Focus Areas
- Group Rx & Medical Benefit Purchasing
 - Approach to PBM Recommendations
 - Alternative Rx Contracting Models
- Use of Data Warehouse to Collect and Integrate Benefits Data
- Disease States of Importance for Member Support
- Services Offered to Members
- Quality & Value-Based Initiatives
- Interest in Working with Biopharma
- Disease States & Program Types of Interest for Manufacturer Support
- Number of Organizations & Covered Lives Represented
- Size of Employer Members

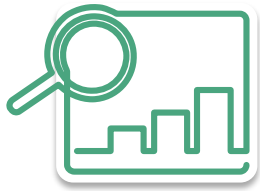
A purchase includes:

- » Unlimited organization-wide access to Excel spreadsheets
- » WebEx demonstrations of Profiles Database tools
- » Hosting of Employer and Coalition Database online at www.benfieldresearch.com
- » Inquiry privileges with employer market experts including custom cuts of data

Contact [Cristin Levine](#) at 314-656-2387 for additional purchasing details or to request a database sample.

Employer Market Trends Report

(June 2025)

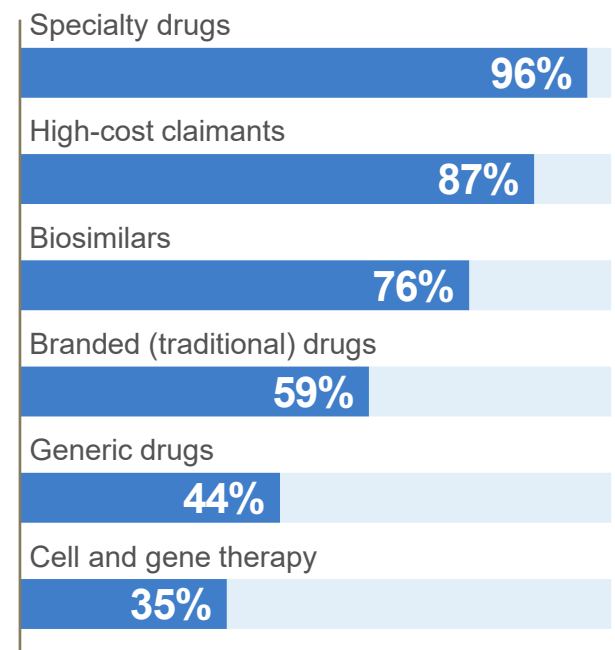


For more than two decades, *The Employer Market Trends Report* has been tracking, studying and predicting the activity of employer stakeholders and the workforce health management challenges they face. Research includes primary insights from 100+ jumbo employer benefits decision makers and coalition leaders.

Report Topics:

- Rx Benefit Design Trends, including Formulary Approaches & Specialty Rx
- GLP-1s for Obesity Management Approaches & Benefit Decision-Making
- Rare Disease Benefit Design & Management
- Biologics & Biosimilars
- Disease States of Importance
- Coverage of Technology-Driven Solutions & Use of Point Solutions
- Copay Offset & Alternative Funding Programs
- Worksite Health Clinics
- Employer Segmentation Model
- Coalition Initiatives & Priorities
- Coalition Group Purchasing
- Implications for Biopharma, Digital Health and Diagnostic Companies

Top Focus Areas for Medication-Related Benefit Decisions (percent ranking top 5)



n=106 Employers

Source: 2024 *Employer Market Trends Report*.

A purchase includes:

- » Unlimited organization-wide access to PDF report (80+ pages)
- » Executive summary, implications and recommendations for manufacturers
- » One customized presentation and electronic copies of presentation for internal use
- » Access to Benfield Research website including downloading of deliverables
- » Inquiry privileges with employer market experts

Contact [Cristin Levine](#) at 314-656-2387 for additional purchasing details.

Special Report: Employer-PBM Market Shifts

(October 2025)



The *Special Report on Employer-PBM Market Shifts* will identify how employer attitudes toward traditional PBM contracts are evolving and how leading-edge employers are driving change. Implications in the report will identify market access opportunities for biopharmaceutical, digital health and diagnostics manufacturers to protect/expand product access and leverage employers as allies in new pharmacy models.

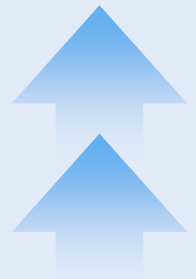
Report Topics:

- Employer Views on PBM Practices (Formulary Management, Rebates, UM Services, etc.) that Impact Employee Treatments
 - Experiences with New Offerings in Most Recent PBM Contract Cycle
- Threshold for Change—Action or Inaction—Including Key Drivers & Hurdles
- Evolution of Pharmacy Benefit Design to Solve for PBM Challenges, Including Flexibility in Auditing Contracts, Adding Specialty Vendor Overlays, etc.
- Innovative Contract Arrangements (Direct Purchasing, Outcomes-based Models, etc.)
- Employer Views on PBM Regulatory Landscape & Influence of Fiduciary Lawsuits/Actions
- Alignment of Employer & Biopharma Interests With Respect to Pharmacy Benefit Decisions

2024 Significant Shifts in Employer Pharmacy Management:

Use of non-traditional pharmacy contracts
(+13 pts)

Exerting control over PBM's PDL (+12 pts)



7 in 10 are likely to add custom formulary changes within 3 years.



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