



Managed Oncology

Academic Institution & System-based Cancer Centers: Market Trends and Manufacturer Competitive Assessment

With ever-increasing payer cost controls and complex distribution logistics of novel therapies, Cancer Centers prioritize initiatives to enhance oncology pharmacy revenue, such as contracting and use of cost-effective medications. HIRC's report, *Academic Institution & Health System-based Cancer Centers: Market Trends and Manufacturer Competitive Assessment*, reviews the market environment for Cancer Centers, their strategic imperatives for 2024, and a competitive assessment of oncology medication manufacturers in Cancer Center engagement. The report addresses the following:

- What are Cancer Centers' top market concerns and strategic priorities in 2024?
- What is the status of Cancer Center activity related to oncology pharmacy and dispensing services (e.g., alternate site infusion, specialty pharmacy)?
- What is the status of oncology preferred drug lists, clinical pathways, and other utilization management tactics?
- What is the status of oncology biosimilar adoption among Cancer Centers?
- Which firms are most often nominated as Cancer Centers' partner of choice? Which firms are nominated as providing the best oncology-related support offerings?
- How do pharmaceutical firms benchmark in account engagement and quality of oncology account managers, medical/clinical science liaisons, and field-based reimbursement managers?

Key Finding: Adequate staffing and training to support expansion/growth, and moving CAR-T cell treatment to an outpatient setting are among Cancer Centers' top strategic priorities for 2024.

Top Market Trends for Cancer Centers in 2024

Cancer Center respondents identify a number of market trends with the potential to impact their organizations, including (1) declining reimbursement from payers (both commercial and government programs), (2) BiTE (bispecific T-cell engager) therapy, (3) oncology biosimilars - opportunities and payer mandates, and (4) payers' site of care programs.

TOP MARKET TRENDS FOR CANCER CENTERS
BY PERCENT OF CANCER CENTERS MENTIONING TREND, 2024

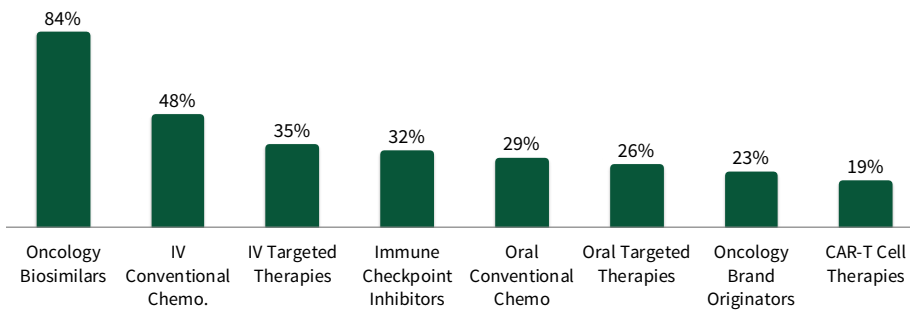
MARKET TREND	% OF TOTAL
Declining Reimbursement from Payers (Commercial & Government)	23%
BiTE (bispecific T-cell engager) Therapy	19%
Oncology Biosimilars - Opportunity and Payer Mandates	19%
Payers' Site of Care Programs	19%
CAR-T Cell Therapy	16%

The full report provides the complete listing of 50+ trends identified by Cancer Centers, as well as their top strategic imperatives for the next 12-18 months.

Cancer Centers Most Frequently Designate Preferred Products in Categories with Oncology Biosimilars

About 84% of respondents in HIRC's sample report having preferred oncology biosimilar products in place in 2024, followed by 48% with preferred IV conventional chemotherapies, and 35% with preferred IV targeted therapies. The full report examines biosimilars in detail, including which are preferred and how Cancer Centers promote their use.

ADOPTION OF ONCOLOGY PREFERRED DRUG LISTS, 2024
% of Cancer Centers



The Managed Oncology Service monitors managed care trends related to oncology medication management and contracting, and reviews market issues in oncology medication distribution and reimbursement across key provider and specialty pharmacy channels. The service benchmarks oncology medication pharmaceutical manufacturers across fifteen high profile cancer types. For subscription information please contact:

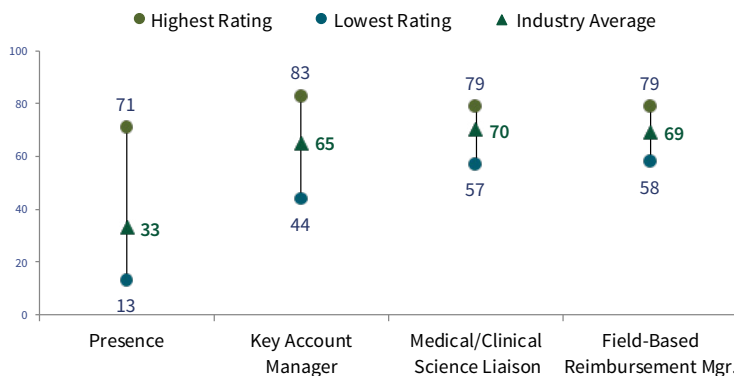


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Pharmaceutical Manufacturer Competitive Assessment

Cancer Center respondents were asked to evaluate three types of manufacturer customer-facing personnel as noted below. Amgen, Pfizer Oncology, Merck Oncology, and Genentech rate highest in overall manufacturer field personnel engagement. The complete report provides Cancer Center executives' ratings of 26 firms active in the oncology space, as well as ratings of manufacturer's oncology-related support offerings and nominations for overall partner of choice.

RANGE OF MANUFACTURER COMPETITIVE ASSESSMENT SCORES, 2024



Research Methodology and Report Availability

In January HIRC surveyed 31 executives from Cancer Centers. Online surveys and follow-up telephone interviews were used to gather information. The complete report, *Academic Institution & Health System-based Cancer Centers: Market Trends and Manufacturer Competitive Assessment*, is available now to HIRC's Managed Oncology subscribers at www.hirc.com.

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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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