



Medicare Advantage Plans: Manufacturer Account Engagement and Contracting for Oncology Medications

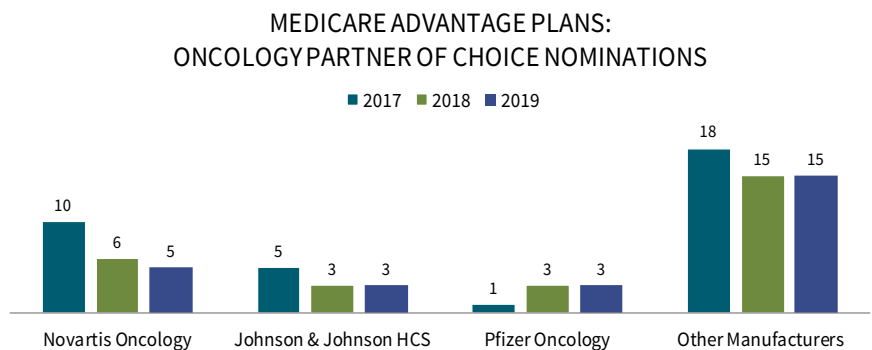
As the oncology medication market continues to grow and diversify with innovative new treatments and oncology biosimilars, developing and maintaining collaborative partnerships with Medicare Advantage plans becomes vital to maintain market access. HIRC's report, *Medicare Advantage Plans: Manufacturer Account Engagement and Contracting for Oncology Medications*, examines the contracting environment and plans' evaluations of 22 firms active in oncology. The report addresses the following:

- Which manufacturers are most often nominated as plans' overall "Partner of Choice" in oncology? Which firms have the most effective oncology key account managers?
- How do firms benchmark in contracting and support of oncology-related initiatives?
- How do Medicare Advantage plan executives perceive the current contracting environment for both oral and IV oncology medications across cancer types?
- Which manufacturer offerings are most compelling to Medicare Advantage plan decision-makers to support their oncology-related needs?

Key Finding: Respondents report education on current and future oncology medication value assessment tools is their primary unmet need in oncology-related support offerings from manufacturers.

Novartis Oncology Receives the Most Oncology Manufacturer Partner of Choice Nominations

For the third year in a row, Novartis Oncology is most frequently nominated as the Medicare Advantage plan oncology Partner of choice, followed by Johnson & Johnson HCS and Pfizer Oncology. Factors driving nominations include quality of account management support, personnel, and/or relationship, followed by quality of programs and resources.

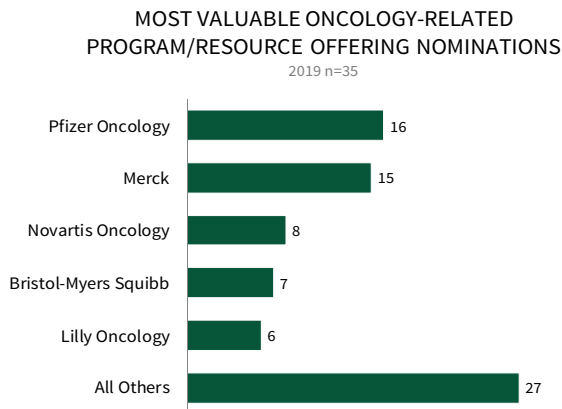


2017 n=43; 2018 n=42; 2019 n=35

The full report includes the complete listing of Partner of Choice nominations and a detailed analysis of the factors driving panelists' selections.

Pfizer Oncology and Merck Lead with Most Valuable Program/Resource Offering Nominations

Panelists were asked to consider all oncology-related resources/programs that have been offered by manufacturers across 13 hematologic and solid tumor types and select one offering that provides the most value in each. A total of 18 manufacturers received 79 nominations. Pfizer Oncology leads with the most program/resource offering nominations, namely for support offerings in breast cancer, multiple myeloma, and NHL.



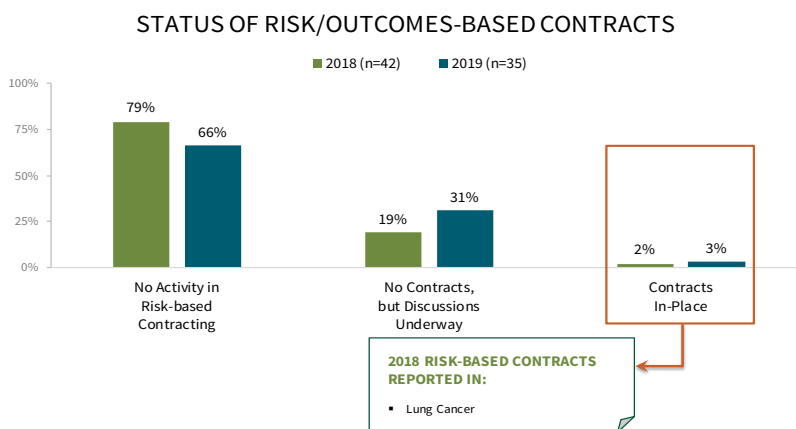
The Managed Oncology Service monitors managed care trends related to oncology medication management and contracting, and reviews market issues in oncology medication distribution and reimbursement across key provider and specialty pharmacy channels. The service benchmarks oncology medication pharmaceutical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



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Prevalence of Risk/Outcomes-based Contracting for Oncology Medications Remains Low

Respondents were asked to share the status of risk-sharing contracts within their organization for oncology medications. While activity remains low, more plans report engaging in risk/outcomes-based contracting discussions in 2019 (31%) compared to 2018 (19%). Lung cancer is the only cancer type reported by HIRC's Medicare Advantage panel that has been targeted for risk/outcomes-based contracting.



Research Methodology and Report Availability

In September, HIRC surveyed 35 pharmacy and medical directors from national, regional, and BCBS plans representing 7.2 million Medicare Advantage lives. Online surveys and follow-up telephone interviews were used to gather information. The complete report, *Medicare Advantage Plans: Manufacturer Account Engagement and Contracting for Oncology Medications*, is available now to HIRC's Managed Oncology 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.

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