



## Managed Oncology

### Community Oncology Practices: Market Trends and Manufacturer Competitive Assessment

Attention of community oncology practice leadership in 2021 has shifted somewhat from value-based reimbursement and adoption of biosimilars, as several trends/issues have emerged to disrupt the oncology segment. HIRC's report, *Community Oncology Practices: Market Trends and Manufacturer Competitive Assessment*, reviews oncology practices' strategic imperatives, quality of cancer care needs and challenges, perception of current account support offerings, and provides a competitive assessment of manufacturer performance. The report addresses the following questions:

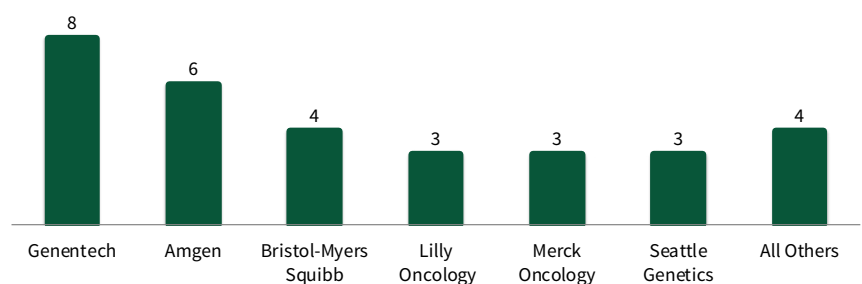
- What are community oncology practices' top market concerns, strategic imperatives, and operational priorities in 2021?
- What is the status of oncology practice activity related to oncology pharmacy services and clinical pathways?
- What is the perceived reimbursement environment for IV oncology medications?
- Which firms are most often nominated as practices' partner of choice, and which firms have best-in-class oncology key account managers, MCSLs, and FRMs?
- How do pharmaceutical firms benchmark in access, account engagement, quality of reimbursement support services, and oncology-related account support?

**Key Finding:** Respondents view the Most Favored Nation Model for Medicare Part B drugs and biologicals, and the shift towards value-based reimbursement as the most disruptive market trends for 2021.

### Genentech Receives the Most Best-in-Class Oncology Key Account Manager Nominations

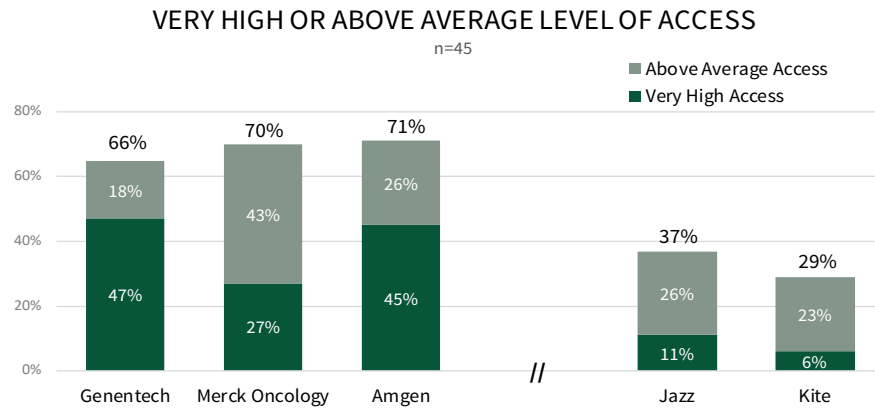
Community oncology practice respondents most frequently nominate Genentech as having best-in-class oncology key account managers, followed by Amgen, and BMS. Factors driving account manager nominations include accessibility, responsiveness, and being respectful of time, as well as demonstrating professionalism, providing relevant and timely information, and working to understand customers' market/business challenges.

COMMUNITY ONCOLOGY PRACTICES:  
BEST-IN-CLASS ONCOLOGY KEY ACCOUNT MANAGER NOMINATIONS



## Genentech, Merck Oncology, and Amgen Earn Highest Ratings in Access to COPs' Senior Leadership

Respondents were asked to rate the level of access that manufacturers' customer-facing personnel has to the oncology practices' senior leadership. Genentech, Merck Oncology, and Amgen lead with very high and/or above average access ratings from over 65% of panelists. In contrast, companies such as Jazz (37%), and Kite (29%) have far less access to COP leadership.



The full report provides a complete list of community oncology practices' access ratings across 26 oncology medication pharmaceutical manufacturers.

## Partnership Opportunities with Community Oncology Practices

Panelists were asked to select one oncology-related account support offering with the most urgent need for a pharmaceutical manufacturer partner. Respondents identify multiple opportunities to partner with COPs on unmet needs, notably in areas related to PA and getting patients started on therapy, as well as reimbursement/financial support.

### COMMUNITY ONCOLOGY PRACTICES: MOST URGENT NEED FOR A MANUFACTURER PARTNER, 2021

SUPPORT OFFERING	% of Panel
Improving administrative processes related to pre-certification/PA and getting patients started on treatment	33%
Assistance with post-treatment delays in reimbursement and/or retroactive denials	15%
Financial and analytical tools to help implement your own standardized cost-effective treatment regimens (by cancer type)	15%

## Research Methodology and Report Availability

In February HIRC surveyed 45 executives from community oncology practices. Online surveys and follow-up telephone interviews were used to gather information. The full report, *Community Oncology Practices: Market Trends and Manufacturer Competitive Assessment*, is available now to HIRC's Managed Oncology subscribers at [www.hirc.com](http://www.hirc.com).

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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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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