



Commercial Health Plans: Manufacturer Account Engagement and Contracting for Oncology Medications

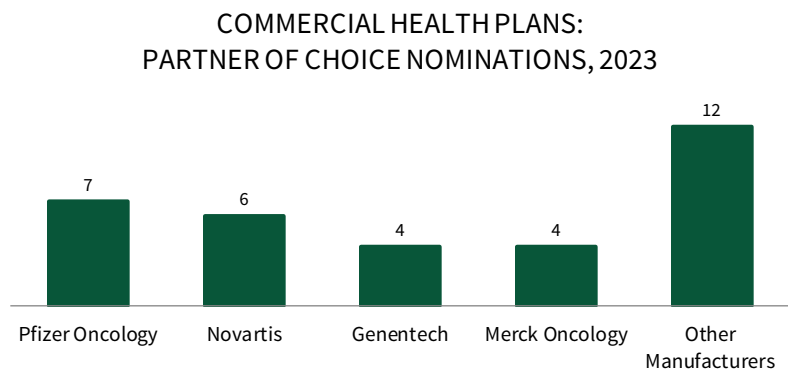
As commercial health plans become more aggressive in targeting oncology in cost saving initiatives, manufacturer engagement and contracting where appropriate remains imperative to continue to ensure market access and remain competitive. HIRC's report, *Commercial Health Plans: Manufacturer Account Engagement and Contracting for Oncology Medications*, examines the contracting environment and payer evaluations of 30+ firms active in oncology. The report addresses the following questions:

- Which firms are most often nominated as plans' Partner of Choice in oncology? Which provide the most valuable program/resource offerings?
- How do firms benchmark in willingness to contract and willingness to support plan's oncology-related initiatives?
- How do firms benchmark in overall quality of oncology account managers and medical/clinical science liaisons?
- What opportunities exist for manufacturers to engage and collaborate with commercial health plans on unmet needs in oncology?
- How do payers perceive the current contracting landscape across eight oncology medication types and in 18 hematologic and solid tumor types?

Key Finding: Commercial plans report high engagement from pharmaceutical manufacturers to support their oncology portfolios, ranging from willingness to contract, to account support personnel, and collaborations on oncology-related initiatives.

Pfizer Oncology and Novartis Receive the Most Oncology Partner of Choice Nominations From Commercial Health Plans

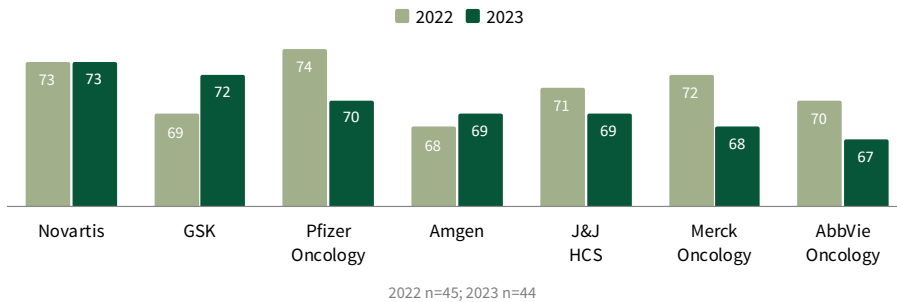
Respondents most frequently nominate Pfizer Oncology and Novartis as their overall Partners of Choice in oncology, followed by Genentech and Merck Oncology. Factors driving nominations include quality of account support personnel and/or the relationship, communication and sustained account engagement, and willingness to contract.



Novartis Rates Highest in Overall Quality of Oncology Medical/Clinical Science Liaisons

Respondents were asked to rate manufacturers on the overall quality of their oncology medical/clinical science liaisons (MCSLs). Novartis leads with the highest overall quality ratings of oncology MCSLs, followed closely by GlaxoSmithKline, Pfizer Oncology, Amgen, and Johnson & Johnson HCS.

OVERALL QUALITY OF ONCOLOGY MEDICAL/CLINICAL SCIENCE LIAISONS, YEAR-OVER-YEAR

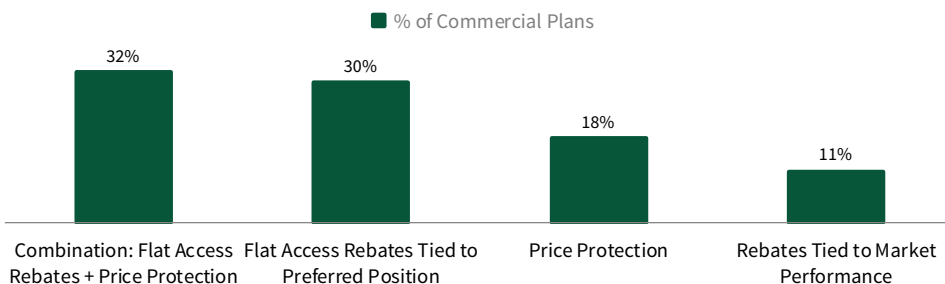


The full report provides the complete listing of commercial health plans' quality ratings of oncology medical/clinical science liaisons and oncology account managers for 30+ manufacturers active in oncology.

Contracting Environment for Oncology Biosimilars

When asked about oncology biosimilar contracting, commercial health plan respondents indicate that manufacturers offer combination contracts: flat access rebates tied to preferred position + price protection most often. The contracting environment across oncology biosimilars and brand originators, targeted therapy, chemotherapy, CAR-T therapies, and immunotherapies are examined in the full report.

% OF PLANS WITH ONCOLOGY BIOSIMILAR CONTRACTS IN-PLACE OR OFFERED IN PAST 12-18 MONTHS



Research Methodology and Report Availability

In 2023, HIRC surveyed 44 pharmacy and medical directors from national, regional, and BCBS plans representing 69 million commercial lives. Online surveys and follow-up telephone interviews were used to gather information. The complete report, *Commercial Health Plans: Manufacturer Account Engagement and Contracting for Oncology Medications*, is available now to HIRC's Managed Oncology subscribers at 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:



Raymond Co, Ph. D.
Research Director
408-884-8560
rco@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.

224 Walnut Street, Suite C
Santa Cruz, California 95060
P: 408-884-8560 • F: 408-884-8561

www.hirc.com