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

To thrive in today’s value-based care environment, Cancer Centers are focused on improving competitiveness, market position, and brand equity. HIRC’s report, Academic Institution & Health System-based Cancer Centers: Market Trends and Manufacturer Competitive Assessment, reviews Cancer Centers’ 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 Cancer Centers’ top market concerns, strategic imperatives, and operational priorities in 2020?
- What is the status of Cancer Center 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 Cancer Centers’ partner of choice, and which firms have best-in-class oncology key account managers, MSLs, and FRMs?
- How do pharmaceutical firms benchmark in access, account engagement, quality of reimbursement support services, and oncology-related account support?

**Key Finding:** Cancer Centers view oncology biosimilars, the shift towards value-based reimbursement, and payer site of care programs as the most disruptive market trends for 2020.

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

Cancer Center respondents most frequently nominate Genentech as having best-in-class oncology key account managers, followed by Amgen, Bristol-Myers Squibb, and Johnson & Johnson HCS. Factors driving account manager nominations include accessibility, responsiveness, and being respectful of time, as well as understanding the market and business challenges of Cancer Centers and offering relevant resources.
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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Genentech Earns Highest Ratings in Access to Cancer Centers' Senior Leadership

Respondents were asked to rate the level of access that manufacturers’ customer-facing personnel has to the Cancer Centers’ senior leadership. Genentech leads with very high and/or above average access ratings from 64% of panelists, followed by Novartis Oncology (58%), Merck (58%), and Bristol-Myers Squibb (55%). In contrast, companies such as Exelixis (27%), and Boehringer Ingelheim (26%) have far less access to Cancer Centers’ leadership.

The full report provides a complete list of Cancer Centers’ access ratings across 23 oncology medication pharmaceutical manufacturers.

Priorities in Improving the Quality of Cancer Patient Care

In follow-up interviews, Cancer Center respondents were asked what their organization’s goals and/or priorities are when it comes to improving the quality of cancer patient care. Panelists report expanding Cancer Center capabilities, providing patient financial support and access to care, and improving patient adherence as the top goals/priorities regarding quality of cancer patient care improvement in 2020.

Research Methodology and Report Availability

In January/February 2020, HIRC surveyed 40 executives from academic institution and hospital/health system-based 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.