



Managed  
Oncology

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

While the COVID-19 pandemic has posed new operational challenges for oncology providers over the past 12 months, Cancer Centers continue to focus on market trends driving change in the segment, such as oncology biosimilar adoption and value-based reimbursement. HIRC's report, *Academic Institution & Health System-based Cancer Centers: Market Trends and Manufacturer Competitive Assessment*, reviews Cancer Centers' strategic imperatives, perception of current account support offerings, and provides a competitive assessment of manufacturer performance. The report addresses the following questions:

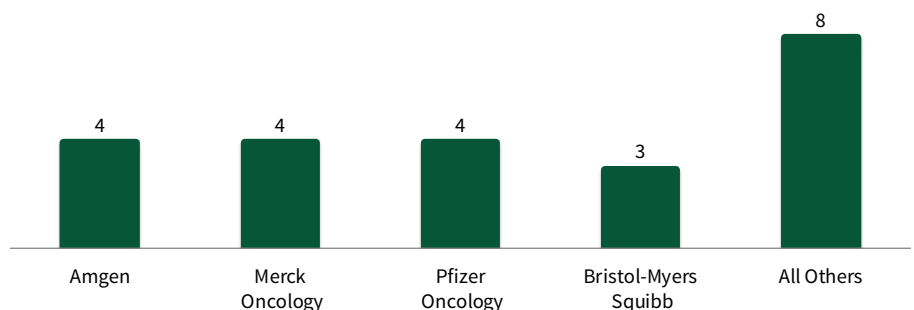
- What are Cancer Centers' top market concerns and strategic priorities in 2021?
- What is the status of Cancer Center activity related to oncology pharmacy services and clinical pathways?
- What is the perceived reimbursement environment for IV oncology medications?
- Which firms are most often nominated as Cancer Centers' partner of choice, and which firms have best-in-class oncology key account managers, MCSLs, 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 biosimilar adoption, the shift towards value-based reimbursement, and payer site of care programs as the most disruptive market trends for 2021.

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

Cancer Center respondents most frequently nominate Amgen as having best-in-class oncology key account managers, followed by Merck Oncology, Pfizer Oncology, and Bristol-Myers Squibb. Factors driving account manager nominations include accessibility, responsiveness, and being respectful of time, as well as providing relevant and timely information.

ACADEMIC INSTITUTION & SYSTEM-BASED CANCER CENTERS:  
BEST IN CLASS ONCOLOGY ACCOUNT MANAGER NOMINATIONS

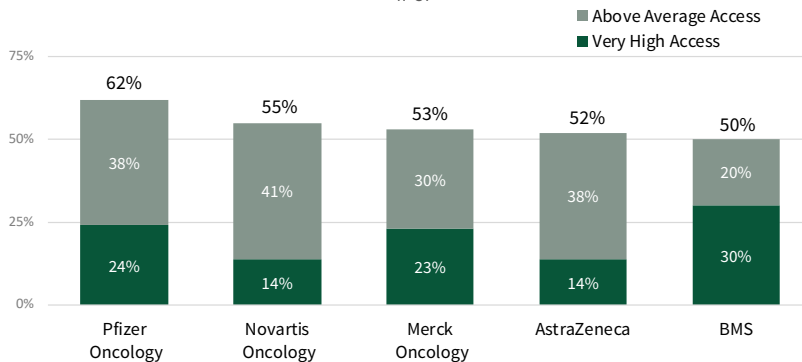


## Pfizer Oncology Earns Highest Ratings in Access to Cancer Centers' Senior Leadership

Panelists were asked to rate the level of access that manufacturers' customer-facing personnel have to the Cancer Centers' senior leadership. Pfizer Oncology leads with very high and/or above average access ratings from 62% of panelists, followed by Novartis Oncology (55%), Merck Oncology (53%), AstraZeneca (52%), and Bristol-Myers Squibb (50%).

### VERY HIGH OR ABOVE AVERAGE LEVEL OF ACCESS

n=37



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

## Critical Success Factors for In-house Specialty Pharmacies

When asked to list the top critical success factors for a Cancer Center's in-house specialty pharmacy, respondents most often cite *Increasing Prescription Capture Rates*, followed very closely by *Inclusion in Integrated Cancer Care Processes*, and *Access to Limited Distribution Medications*.

### CRITICAL SUCCESS FACTORS FOR IN-HOUSE SPECIALTY PHARMACY: BY WEIGHTED POINTS, 2021

CRITICAL SUCCESS FACTOR	# OF WEIGHTED POINTS
Increasing Prescription Capture Rates	22
Inclusion in Integrated Cancer Care Processes	21
Access to Limited Distribution Medications	20
Optimization of Drug Purchasing and Inventory Management	17
Adequate Staffing & Timing	15

## Research Methodology and Report Availability

In February 2021, HIRC surveyed 37 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](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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