

CHEAT SHEET

for entire health care ecosystem

Oncology stakeholder priorities in 2022

Discover the top three oncology-related priorities of each stakeholder

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Stakeholders included

- Providers
- Payers
- Life sciences companies
- Digital health companies
- Consumers



Providers

TOP PRIORITIES

Responding to payer pressures

Payers are increasingly implementing strategies to control oncology costs, including shifting infusions out of the HOPD and white bagging. These policies can be burdensome to cancer providers and have major implications for volumes and revenue.

1

- *Health systems:* To avoid revenue loss from site-of-care policies, hospital-based cancer programs are negotiating new rates for commercially-insured buy-and-bill patients and investing in alternative sites of care. They are pushing back against white bagging by leveraging options such as clear bagging, home infusion, and provider-based billing in their payer negotiations.
- *Independent medical groups and aggregators:* Practices are marketing themselves as low-cost options to payers in their market in order to become an infusion care provider of choice.

Preparing for value-based payment

Provider participation in oncology value-based payment pilots has grown over the last few years as commercial health plans have launched new oncology medical homes, bundled payment programs, and clinical pathways programs. In addition, as CMS' Oncology Care Model (OCM) ends, many cancer programs are considering participating in CMS' next medical oncology payment model, the Enhancing Oncology Model (EOM), or are looking for health plan partners to continue advancing value-based payment.

2

- *Independent medical groups and aggregators:* Having demonstrated success in the OCM, oncology practices and networks are particularly interested in partnering with health plans on innovative payment pilots and joining the EOM.

Meeting patient demand

As cancer volumes continue to rise, oncology providers are concerned about meeting patient demand. Hiring and retaining employees has become more of a challenge due to shifting employee priorities, increasing burnout, and growing competition during the Covid-19 pandemic. Ensuring adequate clinic and infusion space and improving efficiency are also top-of-mind, especially as providers work to reduce the screening backlog from the peak of the pandemic.

3

CONVERSATION STARTERS



- What payer pressures are you seeing in your market?
- How are you responding to increasing pressure from payers?
- What support do you need in responding to pressure from payers?

- Are you planning to participate in the EOM?
- What commercial oncology value-based payment pilots are you currently or considering participating in, if any?
- What barriers do you face to participating in value-based payment pilots?

- What are your biggest challenges to meeting cancer patient demand?
- What strategies have you explored to help you meet cancer patient demand?
- What support do you need to meet cancer patient demand?



Payers

TOP PRIORITIES	CONVERSATION STARTERS 
<p>1 Controlling oncology drug spending</p> <p>Payers are worried about the rapid rise in cancer drug spending, which now makes up the largest cancer care expenditure. In response, they are relying on a variety of tactics to control cancer drug spending, including white bagging policies, prior authorization requirements, clinical pathways, and formulary exclusions. They are also experimenting with newer tactics, such as outcomes-based contracting, value-based payment pilots, and site-of-care policies for oncology infusions.</p>	<ul style="list-style-type: none"> <input type="checkbox"/> What tactics are you using to control cancer drug spending? How are your drug cost-control strategies impacting your relationships with cancer providers and other oncology stakeholders? <input type="checkbox"/> How can our organization support your efforts to lower cancer drug spending?
<p>2 Implementing value-based payment pilots</p> <p>Payers have implemented many new oncology value-based payment pilots over the past three years, including oncology medical homes, bundled payment programs, and clinical pathways programs. Their goal is to lower cancer care spending while promoting high-quality care. Some payers launch their own pilots and enroll many participants, while others design pilots in partnership with individual practices in their markets.</p> <ul style="list-style-type: none"> • <i>Employers:</i> Though employers are interested in lowering cancer costs through value-based care initiatives, they have not been as focused on value-based payment. 	<ul style="list-style-type: none"> <input type="checkbox"/> Are you running any ongoing oncology value-based payment pilots? If so, who is participating, and what do the pilots entail? <input type="checkbox"/> What are your goals when it comes to value-based payment? What kinds of partners are you looking for to help you achieve those goals? <input type="checkbox"/> What are your barriers to implementing oncology value-based payment pilots?
<p>3 Ensuring appropriate care</p> <p>Payers are focused on policies and programs to ensure patients receive appropriate care. Recently, they started launching expert review programs, which connect cancer patients and their local oncologists with subspecialists at top cancer programs for diagnostic and treatment review, and patient steorage programs, which direct patients to receive care at select cancer programs.</p> <ul style="list-style-type: none"> • <i>Commercial plans:</i> Most plans also use prior authorizations and formulary exclusions to control utilization, and some reward providers for adherence to evidence-based pathways. • <i>Employers:</i> Expert review and patient steorage programs are becoming especially popular among employers, who typically partner with providers or third-party companies to provide access to their employees. 	<ul style="list-style-type: none"> <input type="checkbox"/> What strategies are you using to ensure your patients are receiving appropriate cancer care? <input type="checkbox"/> What feedback have you heard from providers and patients? How have you communicated with them about these policies and programs? <input type="checkbox"/> What challenges do you face in implementing these strategies?



Life sciences companies

TOP PRIORITIES

Improving access to innovative treatments

1 As life sciences organizations develop new oncology products, a key concern is ensuring patient access. The success of a product relies on its adoption, and in oncology, this often comes down to payer and provider decision-making. To improve access to new oncology products, life sciences organizations are dedicating extensive resources toward obtaining health plan coverage, achieving provider buy-in, and ensuring clinical pathway inclusion. Along with sharing clinical and efficacy data, they are also starting to highlight more data about product value and cost-effectiveness in conversations with payers and providers. Notably, life sciences companies are increasingly highlighting real-world evidence (RWE) in these conversations.

Innovating around clinical trials

2 In recent years, life sciences companies have been experimenting with clinical trial innovations, especially in oncology. Spurred by the limitations of Covid-19 shutdowns, oncology organizations were among the first to adopt elements of decentralized trials, including moving trials to the virtual setting. Life sciences companies are also exploring new trial designs to enhance the applicability and accuracy of their cancer trial outcomes and improve efficiency across sites of care. In addition, life sciences companies are working to increase the recruitment of underrepresented cancer patients, especially since the FDA recently adjusted its trial diversity requirements.

Advancing personalized medicine

3 Life sciences companies are focused on creating more personalized cancer treatments, as well as identifying patients who are eligible for certain cancer treatments or trials.

- *Pharmaceutical companies:* More organizations than ever are using biomarker status to determine cancer trial eligibility and are launching products with narrower indications.
- *Diagnostics companies:* Pharmaceutical companies are partnering with diagnostics companies to create companion diagnostics to identify eligible patients for their therapeutics.
- *Laboratories:* In-house and third-party labs are most focused on implementing the latest diagnostic tests to ensure cancer patients and their providers can access actionable data.

CONVERSATION STARTERS



- What are the major barriers patients face to accessing your products?
 - What actions, if any, have you taken to improve access to your products?
 - How can our organization help you hone your product's value proposition?
-
- What recent changes have you made to clinical trial recruitment or design? What are your goals in making these changes? What are additional ways to achieve those goals through clinical trial design?
 - What are the main challenges you're facing when implementing new trial designs and incorporating elements of decentralization?
-
- How are you equitably expanding patient access to your products?
 - What are the challenges of implementing personalized cancer treatments, and what are the barriers to making it more universal?

Source: Advisory Board interviews and analysis.



Digital health companies

TOP PRIORITIES

1 Making use of artificial intelligence (AI) and big data

Digital health companies recognize the major role that AI and big data will play in the future of cancer care and are investing products that utilize these technologies. More companies are using large datasets to enhance their existing products or create new products that offer valuable insights or support to oncology customers. For example, many companies have released imaging products that leverage AI to aid in cancer diagnosis and staging. Others are working on products that combine AI and big data to create personalized cancer care recommendations. Today, many digital health companies see utilizing AI and big data as crucial to introducing the next big innovation in oncology.

2 Enabling cross-platform integration

Digital health companies are creating solutions to allow patients' medical history and health information to be shared more easily across providers and platforms. The need to share medical information virtually and securely is especially important in oncology, where patients often have many touchpoints across multiple providers, second opinions through telehealth are popular, and providers regularly rely on third-party imaging and lab data. Providers are also increasingly relying on subspecialists for support on rare cancer cases, which requires remote data sharing. This is a current gap in the market that digital health companies are looking to fill by creating solutions that enable seamless data sharing between different EHR platforms while ensuring medical information confidentiality.

3 Building a unique value proposition

With digital health companies making numerous advances in the oncology space, there is a necessary drive to stay competitive by offering new and different solutions. As a result, companies are emphasizing the unique value propositions of their products so customers (and even potential employees) can distinguish them from the sea of other offerings. To do this, they are carving out unique market segments and honing messaging that appeals to customers' goals and priorities. This can include creating products directed toward niche market segments (such as live-in caregivers) or that provide specific features (like communication with other patients). With these efforts, digital health companies can stand out in the crowded oncology market.

CONVERSATION STARTERS



- How do digital health solutions that use AI or big data fit into your product portfolio?
- What are your biggest concerns with creating and offering AI-backed products?
- What solutions have you created that allow for cross-platform integration of medical information, if any?
- How can other oncology stakeholders support the development of these cross-platform solutions?
- What are the major barriers that you have faced when trying to integrate health information from across different platforms?
- How do you define your value proposition to consumers?
- What makes you different from other digital health companies in the oncology space?

Source: Advisory Board interviews and analysis.



Consumers

TOP PRIORITIES

1 Receiving high-quality care

When choosing where to go for care, cancer patients are seeking top-notch quality above all else. But it's difficult to define quality in a meaningful way, especially in oncology. In addition to meaningful quality data, such as survival rates or number of treatments performed, patients are looking for specialized physicians, access to the latest technology and treatments, and endorsements from physicians they trust as proxies for quality. Cancer programs' ability to demonstrate clinical excellence impacts not only their ability to attract cancer patients, but also to retain those patients. A small but increasing number of cancer patients are willing to switch cancer care providers in search of higher quality care.

2 Receiving convenient care

Over the past few years, cancer patients have increasingly prioritized convenience. They place high value on factors such as co-location of cancer services, having one point of contact to answer questions, and clinics where they can meet with multiple clinicians at once. The growing permanence of telehealth and increasing interest in home-based care in oncology coming out of the Covid-19 pandemic also likely reflect cancer patients' desire for more convenient care. Convenient offerings like these are becoming more of a "need-to-have" than a "nice-to-have" for cancer patients across their care journey.

3 Receiving affordable and cost-effective care

Increased scrutiny of the cost of cancer treatment and growing awareness of financial toxicity are influencing patients' priorities when deciding where to go for care. As price transparency increases and patients are more easily able to compare health care costs online, cancer patients and caregivers are increasingly selecting providers based on cost-related factors such as whether a provider is in-network for their insurance or the costs they will be responsible for with a certain provider. Consumers are also starting to make treatment decisions based on price as data on the costs of diagnostic tests and treatment options becomes more readily available.

CONVERSATION STARTERS



- How do you evaluate the quality of cancer care, and which aspects of care quality are most important to you?
- How does quality of care factor into your decision making about where to receive cancer care?








- What are the biggest barriers you face when accessing cancer care?
- How does convenience factor into your decision making about where to receive care?
- What changes would make accessing care more convenient?

- How does cost influence your decisions about where to receive care?
- How does cost influence which treatments or services you choose to receive?
- What kind of support would be helpful when you are making financial decisions about your cancer care?

Source: Advisory Board interviews and analysis.

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