The life sciences leader’s guide to today’s top oncology trends

Learn about the biggest trends impacting oncology providers, how those trends are altering cancer care delivery, and how your customers are approaching competition in this changing landscape.

4 trends impacting the oncology market

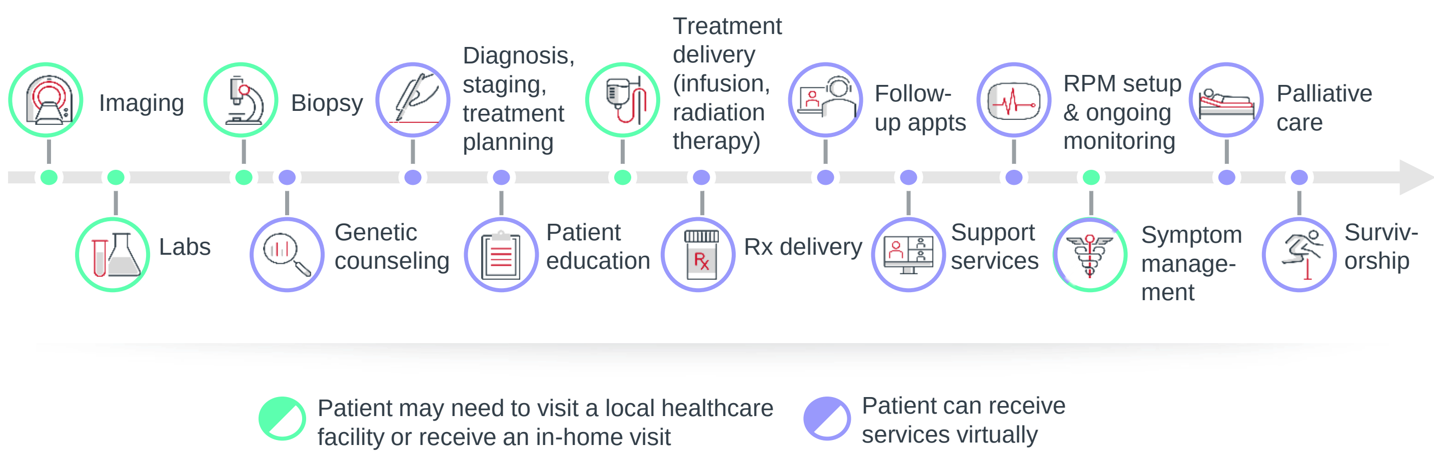
01 Cancer care is moving out of the cancer center and into the home.

- Necessary delivery of at-home cancer care during the pandemic illustrated that home-based care programs can reduce costs, increase capacity, and address patient preferences and needs.
- In the last four years, cancer programs have continued to expand their telehealth, home-based care, and remote patient monitoring offerings. Today, 97% of cancer programs offer virtual visits to at least some of their patients, compared to only 52% in 2019.[1]
- These factors have led to a shift: cancer programs now see home cancer care as a business opportunity, rather than a temporary measure to minimize viral exposure.

02 Traditional cancer service area is redefined beyond geography.

- Most cancer services can now be delivered at home, virtually, or in satellite sites of larger cancer programs. Thus, patients don’t need to visit a cancer program’s main center as frequently, and in some cases, they may never meet their oncologist in person. For example, the VA has created a national virtual oncology service, allowing their oncology specialists to treat cancer patients across the country through telehealth.
- While completely virtual care delivery is not the norm, consolidation among health systems and cancer practices means other providers now have the scale to build national tele-oncology programs like the VA’s. These changes indicate that a cancer program’s service area no longer needs to be exclusively tied to a specific geographic area.

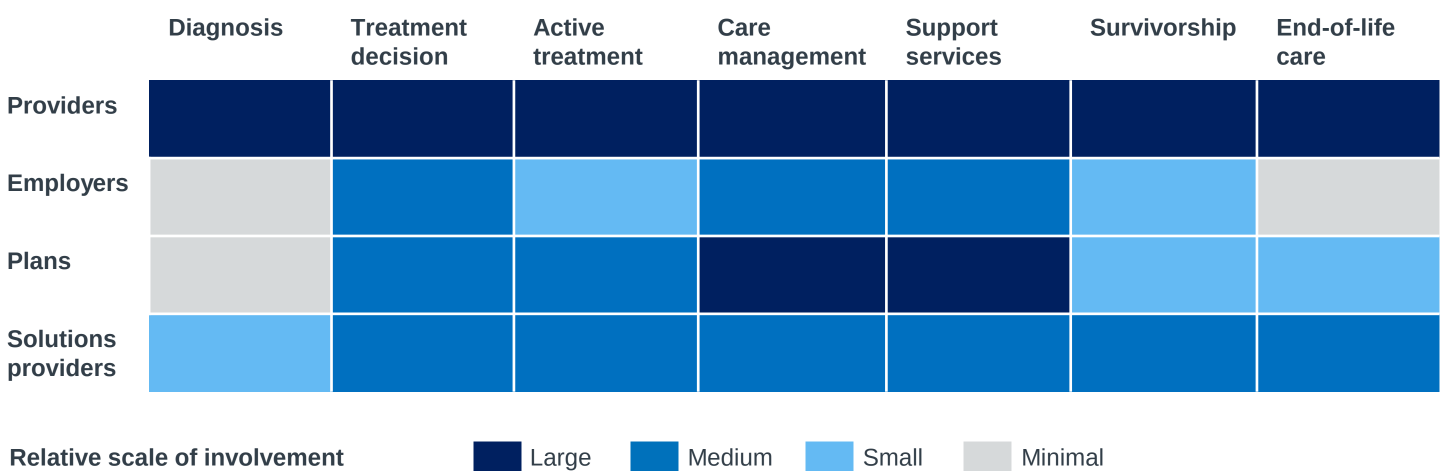
The tech-enabled cancer patient journey



03 Non-traditional investors and stakeholders disrupt the oncology ecosystem.

- Stakeholders including health plans, employers, and solutions providers (such as digital health vendors) are investing in cancer care delivery and support services. For example:
    - Several companies have recently launched services to help plans and employers steer patients to certain low-cost or high-quality networks of providers.
    - Health plans, employers, and solutions providers alike are taking on a larger role in patient support, including providing care managers to help patients navigate their care journeys.
- These stakeholders are shifting from offering point solutions to offering comprehensive care platforms — expanding their influence across the care continuum.
- As new actors get involved in cancer care, care delivery will be increasingly controlled by an entire ecosystem of stakeholders, rather than just the provider.

Stakeholder involvement in cancer care delivery



Understand cancer provider priorities

The widespread adoption of telehealth and home-based care has expanded the traditional service area, leading to national competition among cancer providers. To compete in this new environment, your customers are differentiating through strategies aligned with their specific archetypes. Consider these archetypes and their corresponding growth strategies when shaping how you work with them.

Organization type (*Archetype*)	Approaches to growth and competition	Priorities
Large health systems *(Scaled innovators)*	◆ Opening new sites to expand care delivery footprints ● Pursuing National Cancer Institute (NCI) designation ■ Bolstering clinical research programs and offering the latest clinical innovations	◆ Improve patient convenience ◆ Offer quicker access by increasing capacity ● Build brand awareness ● Improve quality ● Receive additional research funding ■ Differentiate from competitors ■ Highlight innovation to community
Cancer practices *(Value drivers)*	◆ Aggregating into networks to obtain scale ● Investing in value-based care as a primary differentiator	◆ Centralize administrative and technology services ◆ Provide access to clinical research, integrated pharmacies, lab services, and a wide range of peer experts ● Appeal to health plans, employers, and at-risk primary care groups ● Increase flexibility to design patient-centered care models
NCI-designated cancer centers *(Expert partners)*	◆ Building new cancer hospitals ● Expanding second opinion programs ■ Affiliating with community cancer centers	◆ Differentiate through specialization ◆ Become top choice for sickest patients ● Attract new patients ● Diversify revenue streams ● Enhance reputation ■ Grow referral network and expand brand presence ■ Improve care coordination, patient outcomes, and resource sharing
Hospitals and small health systems *(Local leaders)*	◆ Making reactive moves to stay afloat ● Enhancing patient support programs ■ Launching new community programs	◆ Create adaptable programs that can weather the evolving market ● Improve quality ● Avoid volume loss to other programs ■ Expand access and solidify loyalty in the local market

Strategies to guide your interactions with oncology providers

Life sciences companies can improve their partnership strategies and enable commercial growth by accounting for the trends impacting cancer providers today. Consider the opportunities below as you develop a plan for your approach to cancer providers.

01 Cancer care is moving out of the cancer center and into the home.

- **All life sciences:** Collaborate with oncology providers to create and test solutions to enable home cancer care delivery.
- **Pharma:** Expect more demand for oral chemotherapeutics and self-administered treatments that are safe for home use. Offer solutions for improving treatment adherence.
- **Medtech:** Communicate how your innovative medical devices and monitoring equipment can be used easily by patients or clinicians located far from the cancer center. Prepare for rising customer interest in platforms that enable telehealth, remote patient monitoring, e-consults, and real-time data sharing.

02 Traditional cancer service area is redefined beyond geography.

- **All life sciences:** Prepare for the impact that industry consolidation will have on provider decision-making. Focus on building relationships with system-level clinical leadership that will influence decisions regarding clinical pathways, formularies, and drug and device purchasing.
- **Medtech:** Connect your products to customer goals of enhancing access, capacity, and care timeliness.

03 Non-traditional investors and stakeholders disrupt the oncology ecosystem.

- **All life sciences:** Take advantage of the shifting environment by engaging with new market entrants.
- **Medtech:** Partner with solutions providers to integrate technology into broader care ecosystems, ensuring interoperability and data-sharing across platforms for seamless patient experiences.

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Endnotes

1. Simpson KD and Fletcher S. The State of Access and the Healthcare Experience for Patients with Cancer. ACCC. November 1, 2023.

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