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Manufacturers of Oncology Products Fall Short on Meeting the Needs of Oncology-Focused Integrated Delivery Networks; IDN Expansion Expected to Continue through 2014

New research from HRA shows that pharma companies need to develop a deeper understanding of the complex financial and clinical needs of IDNs in order to better reach them

Plainsboro, NJ (October 17, 2013) – Pharmaceutical and biotechnology companies may need to rethink their sales and marketing approach if they want to meet the needs of integrated delivery networks (IDNs) with a focus on oncology care, according to **Oncology-Focused Integrated Networks**, a study published in October 2013 by HRA - Healthcare Research & Analytics.

According to input from 142 oncology-focused integrated delivery network members, no one manufacturer rose to the top as being the best at meeting the needs of these healthcare systems. Novartis and Pfizer were seen most often by these IDNs, however only about one-quarter of the respondents agreed that these companies and others were meeting their needs.

"Understand each individual IDN," said one key opinion leader participating in HRA's research, "…[by knowing] what they are treating, what types of drugs they are prescribing…and who the key players are there." With only 32% of respondents agreeing that pharmaceutical companies understand their IDN's business needs; crafting effective and adaptable strategies for reaching these IDNs is going to be increasingly important for pharmaceutical companies that want a seat at the table.

The size of manufacturers' oncology pipelines signals an onslaught of new drugs introduced into the marketplace over the next few years which supports the position by respondents that there is no doubt that oncology demand will continue to grow . This growth will be echoed in oncology-focused IDNs, with 73% of those surveyed saying that they are somewhat or very likely to expand their oncology services within the next 12 months.

HRA's newest study, **Oncology-Focused Integrated Delivery Networks**, explores the trends toward integration in the delivery of oncology care and the future of this growing market. Methodologically, the research pairs extensive desk research with primary qualitative and quantitative research among Oncologists, Hospitalists, Pharmacy Directors, Medical Directors, and Administrators from institutions that are part of oncology-focused IDNs along with those has have oncology as part of their IDN, however they don't focus on this therapy area. It also includes perspectives from key opinion leaders (KOLs) who serve as experts in the issues surrounding the healthcare market at large. The research covers a variety of topics including how to define the oncology-focused IDNs, policies and procedures within these networks, including clinical pathways, treatment protocols, and the relationship of oncology-focused IDNs with manufacturers. The research provides insights on roles and responsibilities of various stakeholders within the oncology-focused IDN setting and the future outlook for these IDNs, among other themes. HRA's report, which is over 175 pages in length, also provides profiles of 25 leading oncology-focused IDNs.

"The increase in oncology patients, a greater focus on quality of care, and the mounting costs of that care, are creating a tipping point," said Kevin M. Kelly, Executive Vice President & General Manager of HRA. "Integrated delivery networks will continue to grow to respond to these issues and to leverage the benefits of continuity of care."

To learn more about HRA and read additional insights into the relationship between manufacturers and IDNs provided by **Oncology-Focused Integrated Delivery Networks**, visit www.hraresearch.com.

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