Uncovering the True Impact of Oncology Pathways on Oncology Groups

Understanding the varying influence of oncology pathways on oncologist treatment decisions is critical for marketers to develop effective brand strategies in an environment marked by continued pathway adoption.

Oncology pathways have become ubiquitous in oncology groups across the country, with adoption expected to continue (see Figure 1). However, the rates of pathway implementation and impact on treatment decisions vary considerably by oncology group and by pathway administrator (independent group, affiliated health plan, or affiliated institution).

Figure 1
Expected Pathways Implementation by Cancer Type (Percentage respondents)

<table>
<thead>
<tr>
<th>Cancer Type</th>
<th>2016</th>
<th>2017</th>
<th>2018</th>
<th>2019 or later</th>
<th>Never</th>
</tr>
</thead>
<tbody>
<tr>
<td>Breast cancer (n=3)</td>
<td>67%</td>
<td>14%</td>
<td>29%</td>
<td>33%</td>
<td>7%</td>
</tr>
<tr>
<td>Metastatic melanoma (n=14)</td>
<td>50%</td>
<td>14%</td>
<td>29%</td>
<td>7%</td>
<td>7%</td>
</tr>
<tr>
<td>Chronic myeloid leukemia (n=19)</td>
<td>47%</td>
<td>37%</td>
<td>5%</td>
<td>11%</td>
<td>11%</td>
</tr>
<tr>
<td>Non-Hodgkin’s lymphoma (n=14)</td>
<td>43%</td>
<td>36%</td>
<td>14%</td>
<td>7%</td>
<td>7%</td>
</tr>
<tr>
<td>Pancreatic cancer (n=18)</td>
<td>43%</td>
<td>28%</td>
<td>17%</td>
<td>6%</td>
<td>6%</td>
</tr>
<tr>
<td>Renal cell carcinoma (n=19)</td>
<td>37%</td>
<td>21%</td>
<td>21%</td>
<td>16%</td>
<td>5%</td>
</tr>
<tr>
<td>Non-small cell lung cancer (n=6)</td>
<td>33%</td>
<td>33%</td>
<td>17%</td>
<td>17%</td>
<td>17%</td>
</tr>
<tr>
<td>Multiple myeloma (n=8)</td>
<td>25%</td>
<td>37%</td>
<td>25%</td>
<td>13%</td>
<td>13%</td>
</tr>
<tr>
<td>Colon cancer (n=8)</td>
<td>13%</td>
<td>61%</td>
<td>13%</td>
<td>13%</td>
<td>13%</td>
</tr>
<tr>
<td>Prostate cancer (n=11)</td>
<td>9%</td>
<td>37%</td>
<td>9%</td>
<td>36%</td>
<td>9%</td>
</tr>
</tbody>
</table>

To design effective access strategies for your brand, you need market intelligence that digs deeper than identifying which oncology groups have implemented pathways. You need actionable research by cancer type that helps you understand pathway influence on treatment decisions inside oncology groups. Only then can you truly understand how pathways affect prescribing behavior and which pathways may influence prescribing differently.

Understanding oncology medical groups’ current capabilities and future plans allows you to plan proactively, prioritizing the customers that are likely to have greater influence on brand utilization and tailoring your sales approach accordingly.
Why Understanding Impact on Treatment Decisions Matters

Most research on pathways only measures whether an oncology practice has implemented pathways, and for which cancer types. But implementation and impact on impact on treatment decisions are not the same. To understand the opportunities for your brand, you need to understand how detailed pathways are, how they are incorporated into existing treatment decision processes, and how much flexibility oncologists have to choose off-pathway treatment selections.

By understanding where oncology groups fall along the spectrum of pathway implementation and impact on treatment decisions and measurement, brand teams can use their marketing dollars more strategically to influence brand inclusion within pathways, as well as treatment decision making at the group level.

Four Segments Help You Target Your Approaches

Health Strategies Group uses an approach that segments oncology groups based on their levels of pathway implementation and pathway impact on treatment decisions. The four segments are:

- **Dabblers**: Oncology groups with low pathway implementation and low pathway impact on treatment decisions
- **Loose Implementers**: Oncology groups with high pathway implementation and low pathway impact on treatment decisions
- **Careful Planners**: Oncology groups with low pathway implementation and high pathway impact on treatment decisions
- **Leaders**: Oncology groups with high pathway implementation and high pathway impact on treatment decisions

To conduct this segmentation, we use a framework of eight factors that can influence the levels of pathway implementation and impact on treatment decisions in oncology groups (see Figure 2).

**Figure 2**
Eight Factors in Two Defined Areas Determine a Group’s Pathway Implementation and Impact Level

Where a group stands on each factor predicts its segment and where it falls on the continuum of oncology pathway implementation.

- **Breadth of Implementation**
  - Number of cancer types
  - Number of stakeholders
  - Lines of therapy included
  - Treatment types included

- **Impact on Treatment Decisions**
  - Off-pathway approval rate
  - Financial incentives to drive adherence
  - Integration of pathways into CDSS
  - Off-pathway treatment process

Segments
- Dabblers
- Careful Planners
- Loose Implementers
- Leaders
Our research analyzes pathway implementation, adherence, and measurement for the 10 most common types of cancer. It also shows how pathway implementation and impact on treatment decisions vary among implementation segments (see Figure 3). By understanding these differences, marketers can develop strategies to drive utilization even if they are not favorably positioned in pathways. They also can develop current and future strategies to ensure brand inclusion within pathways.

**Figure 3**  
Many Oncology Medical Groups Currently Fall within the Loose Implementer and Leader Pathway Implementation Segments

Understanding pathway adherence and measurement is critical because many oncology groups practice under pathways administered by multiple stakeholders, which may include their own group, affiliated health plans, and/or affiliated institutions. In such an environment, not all pathways will inspire the same level of loyalty among oncologists.

**The Inner Workings of an Oncology Group**

Brand marketers need to understand who and what influences decision making around pathways. Our research covers the key stakeholders affecting pathway decision making in an oncology group. It also details the financial incentives tied to pathway adherence, including fixed fees or variable upside.

Moving forward, most oncology groups will approve fewer off-pathway selections to reduce variability in treatment selection and associated costs. Our research details the percentage of off-pathway treatments currently selected and approved (see Figure 4, on back page). It also reveals what happens when oncologists decide to go off pathway, including the specific documentation required and the key stakeholders involved in approving or denying requests. In addition, the research shows the variability of off-pathway selections by cancer type.
Oncologists are not always aware of the various pay-for-performance and risk-sharing arrangements in which their group participates. For this reason, we also surveyed and interviewed C-suite executives to understand additional factors that may influence pathway implementation and adherence, such as an oncology group’s level of accountable care organization participation now and during the next 12 months.

These executives also provided insights on groups’ current and expected participation in bundled-payment programs, which are commonly associated with greater pathway implementation and adherence.

**Better Intelligence for More Strategic Planning**

As oncology pathways continue to gain traction within oncology groups, companies need to know where they should focus their marketing efforts. Now, marketers have objective research that gives them a deeper understanding of how oncology pathways influence treatment decisions within oncology groups. Using this intelligence, companies can:

- Identify opportunities to influence brand inclusion within pathways
- Understand the factors that increase the likelihood that practices will utilize oncology pathways

Develop more proactive pathway strategies that prioritize those customers more likely to influence brand utilization through pathway implementation and are tailored accordingly.

**About Oncology Pathways Insight and Evolution**

Oncology Pathways Insight and Evolution assesses health plan and oncologist perspectives on oncology pathway implementation, adherence, and measurement so you can identify opportunities to influence brand inclusion today and over the next 24 months.

*Oncology Pathways: Group Practice Assessment* can help clients answer the following key business questions:

- How do pathways impact practicing oncologists’ treatment decisions by cancer type?
- Which stakeholders have the greatest influence on oncology pathways?
- Which factors identify the level of pathway implementation and impact on treatment decisions within oncology group practices?
- What are the opportunities to influence brand inclusion within oncology group practice pathways?