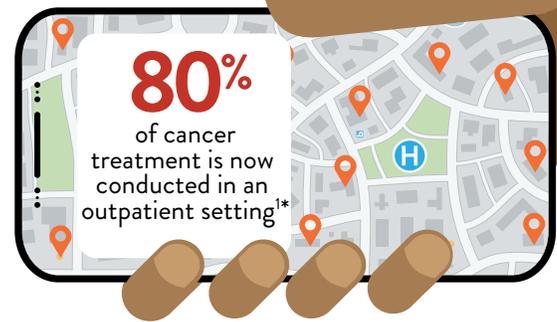


Do You Know Where Your Infusion Products Are Going?

Payers Are Driving the Migration of Infusion Site of Care

When your company sells oncology infusion therapies to a PBM, you might assume a large portion will be used in the hospital setting. But did you know that infusion therapy, once administered only in hospitals, is increasingly moving to non-hospital based outpatient settings?



Where exactly is the infusion market going? Possibly to your local grocery store, or even in-home!

Industry disruptors have offered ambulatory infusion centers for nearly a decade. In 2013 for instance, a St. Louis grocery chain opened an ambulatory infusion center that offered evening and weekend hours, free internet, cable TV, and snacks.³

The retail and in-home infusion shift is accelerating, with large players like Walgreens and CVS expanding into the market.



Home



Physician
Offices



Retail
Clinics

The global home infusion therapy market is expected to grow from **\$27.3B** in 2019

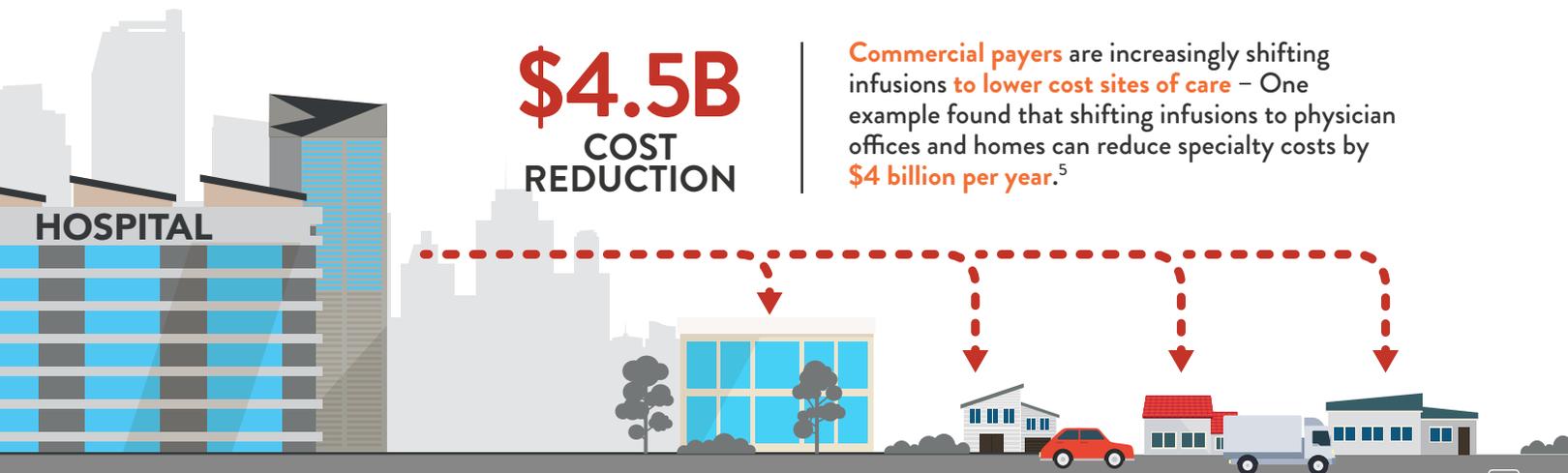
To **\$87B** by 2027²



What's driving the shift in site of care?

\$4.5B
COST
REDUCTION

Commercial payers are increasingly shifting infusions to lower cost sites of care – One example found that shifting infusions to physician offices and homes can reduce specialty costs by \$4 billion per year.⁵



What does this mean for health systems?



While there is potential for patients to benefit from increased convenience and reduced out-of-pocket costs, health systems:

- Risk losing both revenue and patients^{4,5}
- Don't always know about changes until receiving a contract amendment or infusion-related denials⁴
- Have concerns about continuity of care and patient risk management that may be factored into provider treatment decisions

91%

of health system executives said that payer infusion site of care management poses a critical threat to revenue – a greater risk than the COVID-19 pandemic⁶

What does this mean for you?

Life science companies should closely analyze contracts with PBMs and specialty pharmacies, the strategies organizations pursue, and the resulting implications on patient care and provider revenue.



Site of care shifts represent an unprecedented opportunity for life science companies to educate and support provider customers.



Do you want to learn more about how shifts in site of care could impact your customers – and what it might mean for your organization and sales teams? Contact TKG Oncology Today: oncology@thekinetixgroup.com

*Outpatient setting refers to community outpatient settings as opposed to academic centers.

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