

proving **value.** maximizing **access.**

Your Essential Partner: Market Research Reports

- **Payer Perspectives on Biosimilars**
- **Comparative Effectiveness - Rational vs. Rationing**
- **The Changing Cost of Cancer**

Xcenda's market research is valuable, credible, and actionable. Reports are developed with a unique combination of methodological rigor and strategic analysis from a multidisciplinary team with proven experience. Xcenda helps manufacturers grow their business by delivering effective reimbursement strategies and the credible evidence needed to demonstrate brand value and maximize patient access.

These reports deliver the critical payer and provider insights manufacturers need to guide their development of the most effective commercialization strategies.



Payer Perspectives on Biosimilars

The Impact of Biosimilars on Biologic Product Access and Reimbursement

The enactment of a regulatory approval for biosimilars is one of the top issues on President Obama's healthcare agenda. While other industry reports focus on understanding the different proposed bills in the Senate and their impact on the key stakeholders, the view from the private payers has regularly been excluded from these reports.

In today's marketplace, perhaps no group exerts greater influence on a product's commercial performance than payers. Xcenda has developed a unique report that helps key stakeholders gain an understanding of how private payers view the entrance of new biosimilars to the marketplace.

The unique insights found in this report will help key stakeholders develop the most effective strategies to optimize reimbursement for biologic therapies and understand the impact on branded biologics.

Research Results Include:

- How health plans expect to evaluate biosimilar efficacy
- The biggest concerns managed care decision makers have about biosimilars
- The discount managed care organizations expect from biosimilars in competitive categories
- How confident medical and pharmacy directors are in their plans' abilities to challenge provider prescribing preferences and enforce biosimilar generic substitution requirements
- The therapeutic areas where managed care expects to realize the greatest cost savings after the introduction of biosimilar agents
- The manufacturers managed care representatives believe are most likely to develop and market biosimilars
- How international production of biosimilar agents is expected to impact product uptake and coverage in the United States
- Implications for manufacturers

Release Date: April 2009

Periodic supplements will be available

Comparative Effectiveness – “Rational vs. Rationing”

Private Payer and Physician Perspectives on How CE Will Change U.S. Healthcare

The American Recovery and Reinvestment Act of 2009 (ARRA) – better known as the “Stimulus Bill” – was signed into law by President Obama this past February. The ARRA includes \$1.1 billion in funding for comparative effectiveness (CE) research. This administration's legislative focus on CE will have broad implications for all healthcare stakeholders, including manufacturers, payers, physicians, and patients.

In addition to an overview of CE, this report examines private payer and physician perspectives on the future of CE research. The report also includes strategic analysis of the implications that new CE data may have on private payer coverage and reimbursement.

The insights uncovered in this report will guide manufacturers as they consider how CE studies can be utilized to demonstrate a product's value and provide stakeholders the evidence required to maximize patient access.

Research Results Include:

- Current issues shaping the development of CE research
- Support and opposition for “comparative cost-effectiveness”
- The United States' unique global position on CE
- CE versus evidence-based medicine
- A detailed look at historic and future legislative directives related to CE
- Current perspectives and future predictions on CE from managed care stakeholders
- The impact of CE on oncology
- The FDA's role in CE research
- A look into the future of CE across stakeholders
- Implications for manufacturers

Release Date: Spring 2009

Periodic supplements will be available

The Changing Cost of Cancer

How Emerging Trends in Healthcare Management Will Impact Oncology

Due to the increasing number of patients with cancer, and the high cost associated with emerging therapies, managing oncolytics continues to be one of the most challenging issues for payers. Drug expenditures account for approximately 10% of overall healthcare spending in the United States. Considering the historical trend of rising costs, both public and private payers are tackling the question of how to effectively manage access to oncology therapies.

This is Xcenda's second report specifically focused on the oncology market. Our newest offering delivers clear and actionable data that demonstrate how emerging trends in healthcare management are impacting the oncology marketplace. The insights uncovered in this report will help manufacturers improve access to thousands of patients by developing the most effective reimbursement and commercialization strategies.

Xcenda's exclusive access to private payers and physicians via Managed Care Network and NMCR Analytics allows us to gather, query, and analyze the most up-to-date data regarding how these key stakeholders are adapting to current trends and preparing for the future.

Research Results Include:

- How healthcare reform, the economy, and new trends will impact manufacturers, payers, providers, and patients
- The potential role of comparative effectiveness
- The payer and physician perspectives on the anticipated impact of biosimilars
- Provider reimbursement: site of service shifts and quality initiatives in oncology
- Changes in patient cost-sharing: increased out-of-pocket requirements, trends in benefit structures, and patient assistance programs
- Off-label use: utilization patterns and recent changes to compendia
- Implications for manufacturers

Release Date: June 2009