

HOME INFUSION:

Convenience is just part of the story

An Ipsos White Paper



GAME CHANGERS



HOME INFUSION: CONVENIENCE IS JUST PART OF THE STORY

Overview

Home infusion as a viable option has been flourishing as a result of overall trends in the healthcare market that favor the home setting for care. Due to evolutionary changes in patient care resulting from the COVID-19 pandemic, the anticipated future rise of home infusion is happening now. For pharmaceutical manufacturers who have an infusion asset in their pipeline or are considering acquiring one, the opportunities and challenges prompted by home infusion need to be factored into any effective go-to-market strategy.

Brief Introduction

Home infusion, which has been available for a half-century, has been experiencing growth over the last several years. The trend of giving infusions in the home setting has even been gaining momentum in therapy areas, such as oncology, where infusions were typically not administered in the home.

Drivers and Barriers

Powerful drivers, such as lower cost of care, logistics, and patient centricity, have resulted in an increase in home infusion. The opposing barriers are largely focused on perceived safety and reimbursement challenges.

The Future Is Now

General healthcare trends, such as decentralization of care and consumerism, have created an environment that is receptive to home infusion. Due to the COVID-19 pandemic, some of the forces moving infusion services into the home (such as the risk of acquiring infections in healthcare facilities) have been amplified and accelerated. As a result, the increased use of home infusion that was expected in the future is occurring now.

Opportunities

The increase in home infusion, accelerated by COVID-19, could impact the hundreds of infusion drugs already on the market today and those that will be launched in the next few years. As pharmaceutical manufacturers are developing and evolving go-to-market plans for these infusion products, the changes brought about by home infusion should be carefully considered and integrated into go-to-market strategies.



HOME INFUSION: A BRIEF INTRODUCTION

Home and specialty infusion is a multibillion dollar, growing industry. Even though home infusion has been used for decades, there are actually several therapeutic areas where the utilization of home infusion has just begun.

Infusions are fluids that are administered to the patient through a needle or catheter. Used in both acute and chronic illnesses, infusions are usually prescribed when oral medications alone are either not effective or practical.

Home infusion started in the 1970s to provide total parenteral nutrition (TPN) to patients outside of a hospital. In the 1980s and 1990s, the home infusion market expanded rapidly as rehydration therapy and anti-infectives became part of the care paradigm.

Until very recently, infusion treatments in therapy areas, such as oncology, were still not commonly administered in the home. Other therapeutic areas that are generally associated with infusions, but not necessarily home infusion, include:

- hematology
- immunology
- rheumatology

Home and specialty infusion facts:

- This \$19 billion industry serves more than 3 million patients in the U.S.
- Prior to the COVID-19 pandemic, home infusion made up ~13% of infusion market in the U.S.
- It is most commonly used to administer parenteral nutrition, hydration therapy, and anti-infectives.
- Worldwide there are ~380 marketed infusion drugs and another ~160 currently in development (Phase 3); >70% have an oncology or hematology indication.

Recently, innovative physicians have been pioneering home-based chemotherapy for oncology patients and thereby expanding the home infusion care paradigm. Due to the COVID-19 pandemic, more infusions are being moved to the home setting than ever before, creating momentum and support for the shift of care into the home. Additionally, insurance providers are offering more coverage for home infusion therapy and setting a precedent for greater accessibility to home infusion.

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- "Home Infusions and Home-Based Chemo: The Innovation of Penn Cancer Care at Home." *Penn Medicine Physician Blog*. 15 Jun. 2020. <https://www.pennmedicine.org/updates/blogs/penn-physician-blog/2020/june/infusion-therapy-and-home-based-chemo-the-innovation-of-penn-cancer-care-at-home>.
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DRIVERS & BARRIERS: MOVING INFUSIONS TO THE HOME SETTING

Patient centricity and overall lower cost of care are key drivers of home infusion. Some of the barriers to implementing home infusion more broadly are perceived concerns about safety, limited CMS reimbursement, and resistance to changing the status quo.

DRIVERS

Patient centricity

- Several studies show that patients prefer home infusion and report greater physical and mental well-being.

Lower cost of care

- The average cost of care for infusion in the home is lower than in the hospital outpatient setting. Commercial payers are using site-of-care optimization strategies to steer patients to the lower-cost home infusion setting.

Logistical simplicity

- There is an established process in place for providing infusion care in the home. Home infusions also cause less disruption to family and personal responsibilities since the patient does not need to travel to an infusion site.

Lower risk of nosocomial infections

- Home infusion may reduce the risk of acquiring a hospital-associated infection since there is less patient and caregiver exposure to a hospital or clinic setting.

BARRIERS

Perceived safety concerns

- Both patient and physician concerns about home infusion range from potential risk of adverse events during infusion and general drug toxicity can be attributed to the lack of direct physician presence in the home setting.

CMS reimbursement policies

- Depending on the drug product and indication, reimbursement for home infusion is variable. In particular, Medicare reimbursements have fluctuated over the years. Changes to Medicare coverage for home infusion, as part of the 21st Century Cures Act, should create more consistent reimbursement for Medicare patients.

Need to change the status quo

- Patients and physicians will often base their preference for a setting on experience. Real or perceived technical hurdles are greater for unfamiliar settings of care.

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- "Home Infusion Therapy Services." *CMS.gov*. 29 Oct. 2020: <https://www.cms.gov/Medicare/Medicare-Fee-for-Service-Payment/Home-Infusion-Therapy/Overview>.



THE FUTURE IS NOW: HOME INFUSION IS MORE RELEVANT THAN EVER

Current trends in healthcare were already providing a very favorable environment for home infusion and have been accelerated by the demands of the COVID-19 pandemic.

Healthcare trends that are fueling the push to home infusion:

Decentralization of care

- Patient care has become less focused on the inpatient setting. The home offers an attractive alternative for patient care that is not hospital based.

Consumerism in healthcare and focus on wellness

- The needs and wants of patients are becoming paramount, with many patients preferring to receive care in the home.

Increased use of technology

- Advances in point-of-care technology, an increase in wearables, and greater use of telemedicine allow for better remote monitoring and thereby enable safer care in the home.

Transition to value-based care

- Infusion care in the hospital and the outpatient hospital setting can be very expensive. The increased focus on the value of care favors home infusion, which can be more cost-effective.

The COVID-19 pandemic has further increased the shift towards home infusion already occurring.

Example #1: Early in the pandemic, infusion providers Option Care Health® and Coram® (a specialty CVS company that delivers infusion therapy services) utilized their existing expertise in providing infusion care in the home setting, coordinating with health systems to move stable patients from healthcare facilities to receive care at home.

Example #2: The team at Penn Medicine started their Cancer Care at Home (CC@H) program before the pandemic. Most oncologists were still wary of delivering oncology care at home. In a June 2020 position statement, ASCO still recommended that anticancer therapy not be delivered in the home. However, the innovative team at Penn designed and implemented workflows that ensured safety and quality care and allowed patients to safely receive oncology care in the home setting. The program saw a 700% rise in patient participation during the pandemic.

Sources:

- "Home Infusions and Home-Based Chemo: The Innovation of Penn Cancer Care at Home." *Penn Medicine Physician Blog*. 15 Jun. 2020. <https://www.pennmedicine.org/updates/blogs/penn-physician-blog/2020/june/infusion-therapy-and-home-based-chemo-the-innovation-of-penn-cancer-care-at-home>.
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OPPORTUNITIES: IMPROVING PATIENT CARE

The expansion of home infusion that was triggered by general trends in healthcare and accelerated by the COVID-19 pandemic has transformed the patient journey for infusion therapy and created new opportunities, as well as challenges, for pharmaceutical manufacturers who are considering market entry or evolution of an infusion product.

Opportunities to improve patient care through home infusion:

Patient access

Home infusion can **increase access for patients who are not easily able to travel** to an outpatient location to receive an infusion (due to personal or geographic limitations).

Adherence and compliance

Patient adherence and compliance to infusion therapy can be improved by home infusion since **the patient's burden of responsibility is lower**, relative to infusions that occur outside the home.

Patient comfort

The ability to receive infusion care in the home causes **less disruption to the patient's daily life** and therefore increases patient comfort.

Quality of care

The **timing** of the infusion administration in the home **is not dependent on the patient's ability/availability to travel to an outside location** and is more likely to be administered at a therapeutically optimal time.

Cost of care to patient

Home infusion costs less than care provided in the hospital outpatient setting; for patients with high percentages of cost-sharing (including Medicare patients), home infusion **can reduce the overall cost burden on the patient.**

OPPORTUNITIES: GO-TO-MARKET STRATEGY CONSIDERATIONS FOR INFUSION DRUGS

The benefits to the patient, as well as the greater availability and utilization of home infusion, necessitate a close review of existing go-to-market strategies for infusion drugs.

A few examples of things to consider when developing a go-to-market strategy for an infusion drug:

Involve additional stakeholders, such as home infusion providers, as you develop your go-to-market strategy.

Understand HCP and patient preferences in your therapeutic area with regard to home infusion.

Reimagine patient support programs to reflect the unique requirements of home infusion.

Develop clear messaging regarding administration of your drug in the home setting.

Reconsider distribution, including opportunities for partnerships and cooperation.

For any home infusion eligible drug, ensure that you understand how home infusion could impact your business model and develop the relevant go-to-market strategy.

Sources:

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SUMMARY

- Home infusion is an expanding market that provides a **patient-friendly, safe, and cost-effective** way to administer infusion drugs to patients in their home.
- **General healthcare trends have been fueling the growth of home infusion** over the past decade, but utilization is still limited in some therapeutic areas.
- **COVID-19 has reinforced and accelerated the use of home infusion** in some of the therapeutic areas that were previously slow to accept the setting.
- The increased use of home infusion (including the acceleration seen during the COVID-19 pandemic) **could impact where hundreds of infusion drugs** already on the market today and those that will enter the market in the next several years **are administered**.
- Pharmaceutical manufacturers who have an infusion asset in their pipeline should be aware of the **benefits that home infusion brings to patients, providers, and payers** but also of the need to adjust their go-to-market strategies to take home infusion into account.
- Increased utilization of home infusion is here to stay and will continue to **play a significant role in patient care, compliance, and cost management** in the future.

ABOUT IPSOS

Ipsos Healthcare Advisory Service is a diverse group of management consultants, brand strategists, researchers, sociologists, and marketers who are passionate about developing breakthrough brand and marketing strategies. Whether it is consumer segmentation, future-proofing of a business, or an innovation white space investigation, we partner with our clients to help their brands realize their full potential.

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