

2018 Community Oncology Alliance Practice Impact Report



1,653 Community Oncology Clinics and/or Practices Have Closed, Been Acquired by Hospitals, Merged, or Reported Financial Struggles Since 2008

Misguided Public Policies Continue Push and Pull on Community Oncology Practices

The 2018 Community Oncology Alliance (COA) Practice Impact Report tracks the changing landscape of community cancer care in the United States. This is the seventh practice impact report issued by COA and covers a ten-year period from January 2008 through February 2018.

The 2018 COA Practice Impact Report data shows that over the last decade, 1,653 community oncology clinics and/or practices have closed, been acquired by hospitals, undergone corporate mergers, or reported that they are struggling financially. An average of 3.5 community oncology practices have closed per month, a rate that remains unchanged since the last report issued in 2016. Overall, 13.8 practices per month have closed, been acquired by hospitals, or undergone mergers since 2008.

The 2018 Community Oncology Practice Impact Report data shows:

- **423 clinics closed** — Individual clinic treatment sites that have closed.
- **658 practices acquired by hospitals** – Practices (typically comprised of multiple clinic sites) acquired by a hospital or, with less frequency, have entered into a contractual professional services agreement binding them to a hospital.
- **168 practices merged or acquired** – Practices (typically comprised of multiple clinic sites) merged or acquired by a corporate entity.
- **359 practices struggling financially** – Practices (typically comprised of multiple clinic sites) having financial difficulties, struggling to pay bills and/or stay open.
- **45 practices sending patients elsewhere** – Practices (typically comprised of multiple clinic sites) sending their Medicare patients elsewhere for chemotherapy.

Since the last Practice Impact Report in 2016, the data show an 11.3% increase in the number of community cancer clinic closings and an 8% increase in the number of consolidations into the hospital setting. Note that the number of practices struggling financially has declined by 7.9% which is proportional to the number of practices that have been acquired or moved into the hospital setting.

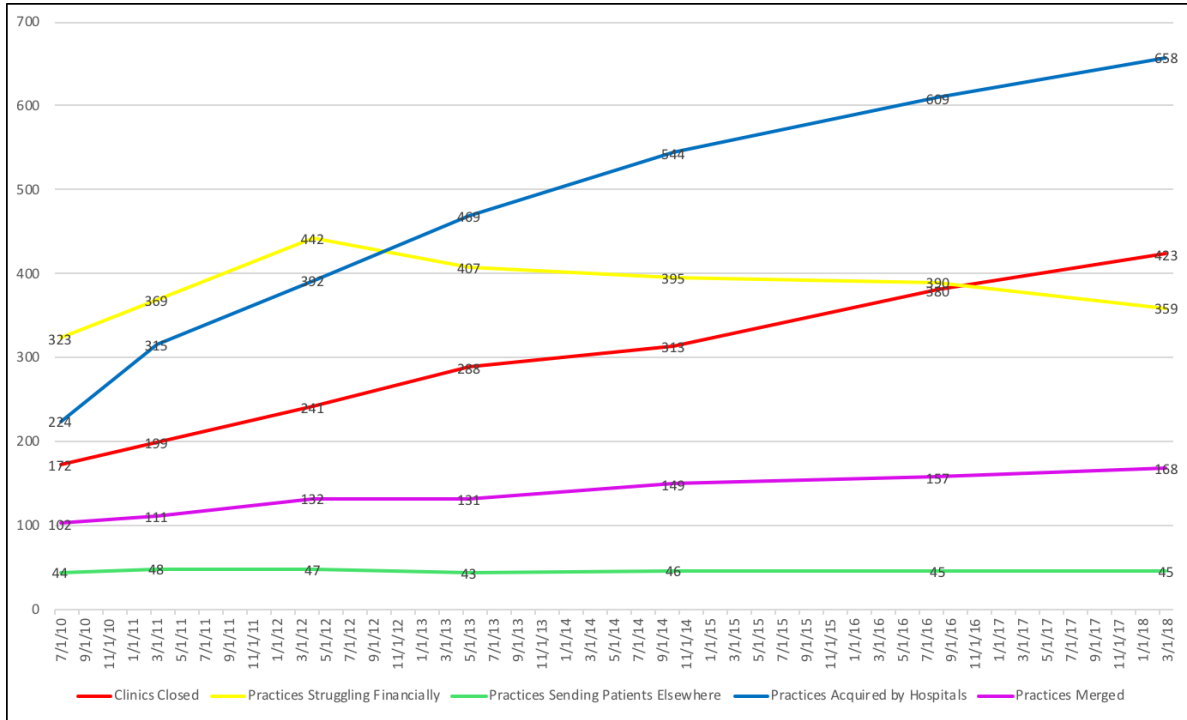
Compiled from public and private data sources, the 2018 Practice Impact Report provides a unique look at community oncology trends at both the national and state levels. At the state level, the largest number of closures is again in Florida (47), followed by Texas (43) and Michigan (36).

	2010 Report	2011 Report	2012 Report	2013 Report	2014 Report	2016 Report	2018 Report
Clinics Closed	172	199	241	288	313	380	423
Struggling Financially	323	369	442	407	395	390	359
Sending Patients Elsewhere	44	48	47	43	46	45	45
Acquired by Hospital	224	315	392	469	544	609	658
Merged or Acquired	102	111	132	131	149	157	168
Totals	865	1,042	1,254	1,338	1,447	1,581	1,653

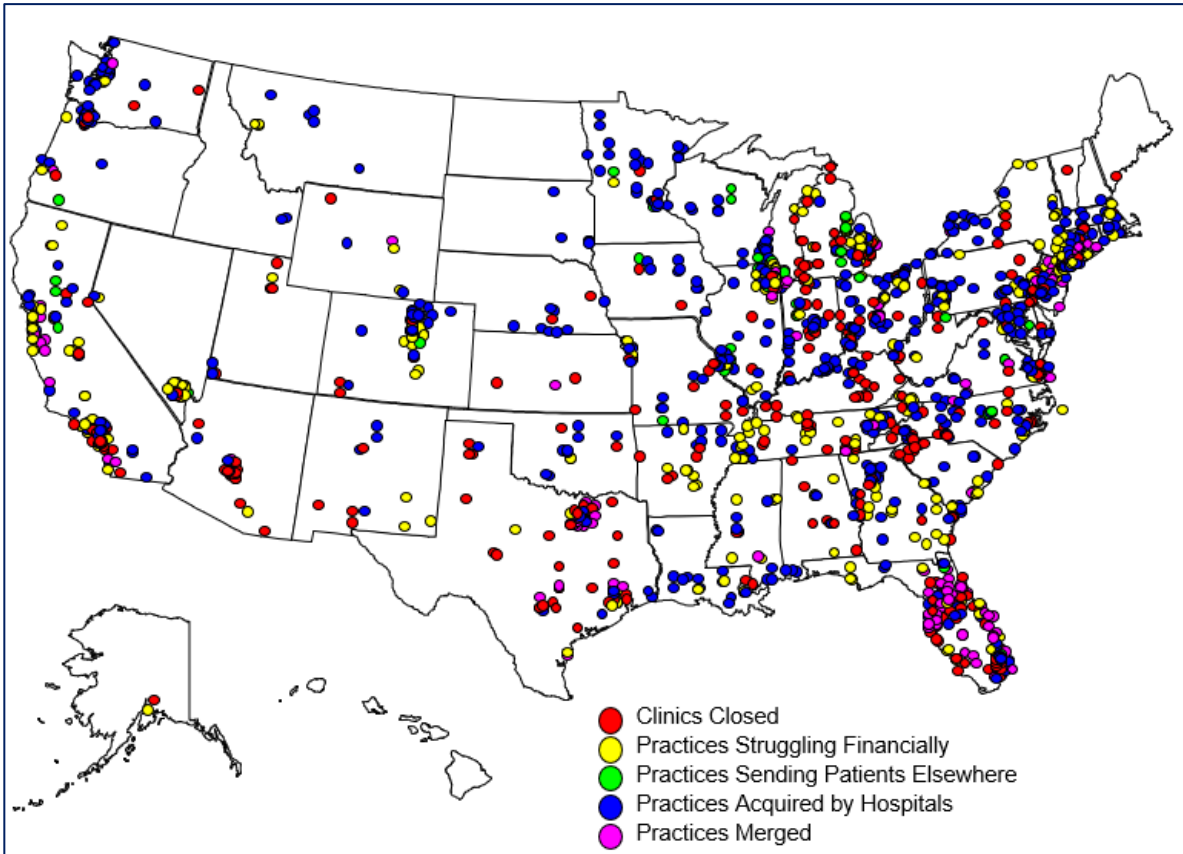
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Trends in the Changing Landscape of Cancer Care (Derived from current and past reports)



Mapping the State Impact



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State	Total Sites/Practices Impacted	Clinics Closed	Practices Struggling Financially	Practices Sending Patients Elsewhere	Practices Acquired by Hospitals	Practices Merged
Alabama	18	7	4	0	7	0
Alaska	2	1	1	0	0	0
Arizona	23	5	10	0	5	3
Arkansas	23	16	1	0	6	0
California	124	32	40	4	33	15
Colorado	47	8	15	2	22	0
Connecticut	15	2	2	0	11	0
DC	2	0	2	0	0	0
Delaware	6	5	0	0	1	0
Florida	157	47	19	2	35	54
Georgia	54	14	17	0	23	0
Hawaii	0	0	0	0	0	0
Idaho	2	0	0	0	2	0
Illinois	86	15	28	9	19	15
Indiana	46	16	4	2	23	1
Iowa	12	2	0	1	9	0
Kansas	6	3	0	0	2	1
Kentucky	37	17	2	0	18	0
Louisiana	20	3	4	0	13	0
Maine	1	1	0	0	0	0
Maryland	26	2	7	2	13	2
Massachusetts	21	4	4	0	11	2
Michigan	101	36	42	6	15	2
Minnesota	28	2	1	2	23	0
Mississippi	15	1	5	0	8	1
Missouri	40	10	5	2	22	1
Montana	8	0	3	0	5	0

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State	Total Sites/Practices Impacted	Clinics Closed	Practices Struggling Financially	Practices Sending Patients Elsewhere	Practices Acquired by Hospitals	Practices Merged
Nebraska	10	2	0	0	8	0
Nevada	21	4	15	1	1	0
New Hampshire	1	0	0	0	1	0
New Jersey	42	6	11	0	14	11
New Mexico	11	4	3	0	4	0
New York	99	13	39	0	39	8
North Carolina	51	15	4	4	26	2
North Dakota	1	0	0	0	1	0
Ohio	65	16	8	1	37	3
Oklahoma	12	2	2	0	8	0
Oregon	23	3	2	1	16	1
Pennsylvania	71	10	9	0	49	3
Rhode Island	6	0	3	0	3	0
South Carolina	29	11	4	0	10	4
South Dakota	6	0	0	0	6	0
Tennessee	66	20	25	0	18	3
Texas	90	43	6	1	13	27
Utah	9	5	2	0	2	0
Vermont	1	1	0	0	0	0
Virginia	42	9	5	2	20	6
Washington	28	3	2	0	22	1
West Virginia	11	4	1	1	5	0
Wisconsin	33	2	0	2	28	1
Wyoming	5	1	2	0	1	1
Grand Totals	1,653	423	359	45	658	168