

2024 NAPT Member Survey: EXECUTIVE SUMMARY

Key data on proton therapy in the U.S.

Since 2012, the National Association for Proton Therapy (NAPT) has conducted an annual member survey designed to reveal key metrics regarding the patient and provider ecosystem evolving from one of the world's most innovative cancer treatments. The only survey of its kind in the U.S., it yields insights including changes in the mix of conditions treated by proton therapy, treatment centers by type, industry growth, the impact of prior authorizations, and other trends and challenges.

NAPT survey responses and data from public sources reveal a stable and maturing cancer treatment community. A majority of proton therapy centers are affiliated with hospitals and academic institutions. Additionally, the number and variety of conditions treated by proton therapy are increasing, and more patients who have previously undergone radiation for cancerous conditions are seeking proton therapy as a treatment option.

Centers and Patients

- The number of patients receiving proton therapy **increased by 727 patients** from 2022, to 16,822 nationwide.
- The number of re-irradiation patients has increased among those receiving proton therapy, **from 2,293 in 2022 to 2,687 in 2023.**

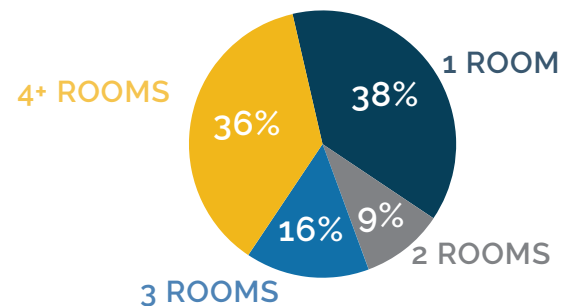
Type of treatment center, by number of treatment rooms:

- **1 room: 38%**
- **2 rooms: 9%**
- **3 rooms: 16%**
- **4+ rooms: 36%**

Type of treatment rooms by affiliation:

- **Academic: 60%**
- **Hospital-based: 67%**

TREATMENT CENTERS BY NUMBER OF ROOMS:



TREATMENT CENTERS BY AFFILIATION:

ACADEMIC: 60%

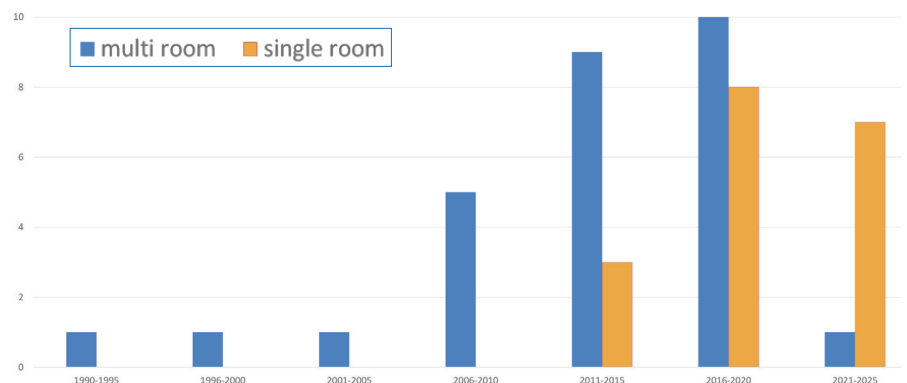
HOSPITAL-BASED: 67%

78% OF CENTERS ARE NOT-FOR-PROFIT

PROTON CENTERS DEVELOPED:

MULTI CENTER VS. SINGLE ROOM

Smaller single room centers have dominated recent growth in proton therapy centers in recent years.





Conditions Treated

From 2022-2023, the mix of conditions treated by proton therapy has changed along with treatment center growth and the publication of new evidence regarding efficacy – as follows, by number of patients and cancer type:

- **Breast: +7%**
- **GI Tract: +6.4%**
- **Head & Neck: -3.8%**
- **Prostate: -11%**

In 2023, a decrease was noted in treatments for head and neck cancer, currently the subject of a phase III randomized trial supporting the value of proton therapy for these conditions. NAPT will continue its work to increase public awareness of the value proton therapy for head and neck conditions and ensure that payor guidelines reflect the most recent clinical findings.

Barriers to Care

Despite progress, there are still barriers to care, including administrative burdens and unnecessary delays in patient treatment due in large part to the prior authorization process.

- **Proton therapy currently represents less than 1% of all radiation oncology treatments** by modality.
- Approximately **65% of the U.S. population lives more than 100 miles** from a treatment center.

The prior authorization process continues to delay vital care for patients:

- **73% percent of patients experienced an average wait time of more than 6 days** for PT treatment authorization in 2023, an increase from 63.8% 2022.
- **75.8% of patients in 2023 “sometimes” or “often” experienced delays in care** delivery due to prior authorization, an increase from 75% in 2022.
- **29.9% of prior authorizations in 2023 were initially denied, down from 33.8% in 2022** – a decline resulting from the effective advocacy efforts of NAPT and its members.

The proton therapy community, however, continues to experience growth as an increasing number of patients experience this life-saving, life-changing treatment.



Full 2023 Member Survey results are available exclusively to NAPT Members.

To learn more about the benefits of membership, visit:

proton-therapy.org/join-napt



The National Association for Proton Therapy (NAPT) and its members support cancer research and treatment innovation and are committed to raising awareness about the value of proton therapy among policymakers, insurers, caregivers and patients to ensure that this advanced treatment modality is affordable and available in communities across the country.

LEARN MORE: [PROTON-THERAPY.ORG](https://proton-therapy.org)



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