

2023 NAPT Member Survey: EXECUTIVE SUMMARY

Key data on proton therapy in the U.S.

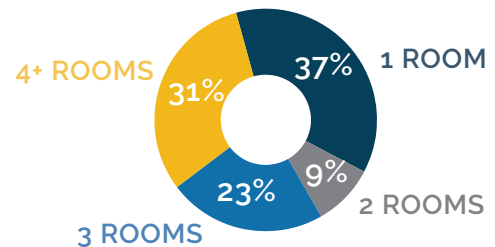
Since 2012, the National Association for Proton Therapy (NAPT) has conducted an annual member survey designed to reveal key metrics regarding the patient and provider ecosystem evolving from one of the world's most innovative cancer treatments. The only survey of its kind in the U.S., it yields insights 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 also reveal a cancer treatment community that is stable and maturing as a majority of proton therapy centers affiliate with hospitals or operate as non-profits, as the number of conditions treated by proton therapy increases in number and variety, and as treatment is increasingly sought as an option for patients who have undergone previous radiation for cancerous conditions.

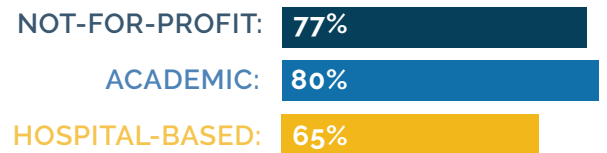
Centers and Patients

- The number of patients receiving proton therapy **increased 176%** from 2013 to 2022.
- The number of re-irradiation patients has increased among those receiving proton therapy, from 1,824 in 2021 to 2,293 in 2022 – **an increase of more than 25%**.
- There are **43 operating proton treatment centers in the U.S. with a total of 113 treatment rooms**. Pencil beam scanning is the dominant form of treatment.
- Over **75% of National Comprehensive Cancer Network centers provide the option of proton therapy** for their patients or plan to incorporate proton therapy into their cancer programs.

TREATMENT CENTERS BY NUMBER OF ROOMS:



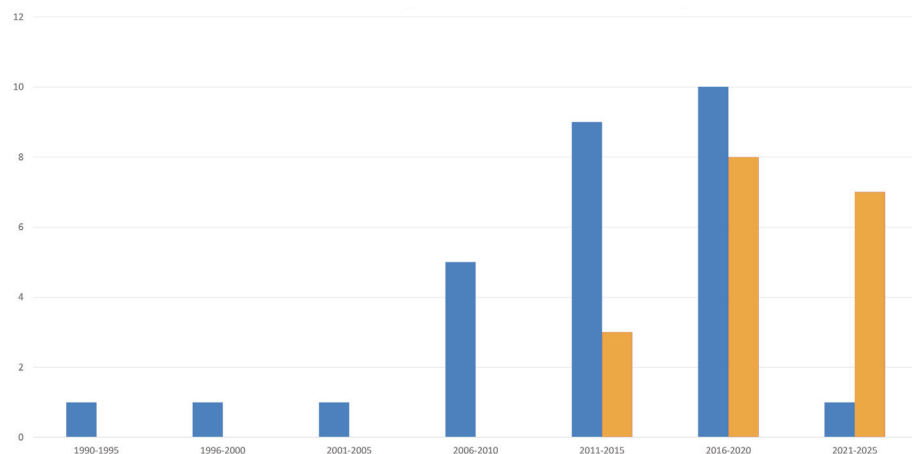
TREATMENT CENTERS BY AFFILIATION:



PROTON CENTERS DEVELOPED: MULTI CENTER VS. SINGLE ROOM

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

■ multi room ■ single room



Proton Center Staffing



51% of centers said it was difficult to find candidates with proton experience, up from 43% in 2021.



Centers reported that **dosimetrists, radiation therapists and physicists took longer to hire**, while physicians took the shortest amount of time to hire.

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.

THE PRIOR AUTHORIZATION PROCESS CONTINUES TO DELAY VITAL CARE FOR PATIENTS:

- 64% percent of patients experienced an average wait time of **more than 5 days for PT treatment** authorization in 2022, an increase of 48% from 2021.
- In addition, 22% of patients in 2022 had an **average wait time of more than 11 days**, up from 14.7% in 2021.
- **75% of patients in 2022 “sometimes” or “often” experienced delays** in care delivery due to prior authorization, an increase of 65% from 2021.
- **34% of prior authorizations in 2022 were initially denied**, down from 43% in 2020 – a decline resulting from the effective advocacy efforts of NAPT and its members.

Proton therapy currently represents less than 1% of all radiation oncology treatments by modality, and approximately **70% of the U.S. population lives more than 100 miles from a treatment center.**

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, visit:

proton-therapy.org/join-napt

Conditions Treated

From 2012-2022, 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 cancer type:**

- **Breast: +7.6%**
- **GI tract: +3.9%**
- **Head and Neck: +8.7%**
- **Prostate: -16.9%**

The number of prostate cancer patients treated has remained comparatively stable, but the relative proportion has decreased – **from 43.4% to 25.0% of all patients treated with proton therapy.** A greater proportional increase was found among more complex conditions, especially breast, lung, head and neck, and gastrointestinal tumors. Given the increase in the types of disease presentations treated and volumes irradiated, treatment complexity is increasing over time.

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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