



NGS Testing Market Research

Findings from a primary online survey of 100 U.S. healthcare stakeholders

Research Objectives & Methodology Overview

Objective

- Measure current awareness and perceived clinical utility of NGS testing across key non-patient stakeholders.
- Identify top barriers to adoption and scale.
- Assess likely near-term growth drivers and adoption intent.
- Deliver actionable strategic recommendations for commercial, clinical, and policy teams.

Methodology

- Design: Cross-sectional, self-administered online survey (single wave; panel incentives at norms).
- Sample: n=100 U.S.-based stakeholders (oncologists, genetic counselors, pathologists/clinical MDx, diagnostic lab directors, payer medical directors, pharma/biotech clinical dev/MA).
- Length: ~12–15 minutes; Analysis: descriptive stats and cross-tabs.

Respondent Profile

- Geography/setting: U.S.-wide; 60% hospital/academic medical center, 25% commercial lab/private practice, 15% payer/pharma.
- NGS experience: 78% moderate-to-high familiarity; 64% directly involved in ordering/interpreting/implementing.

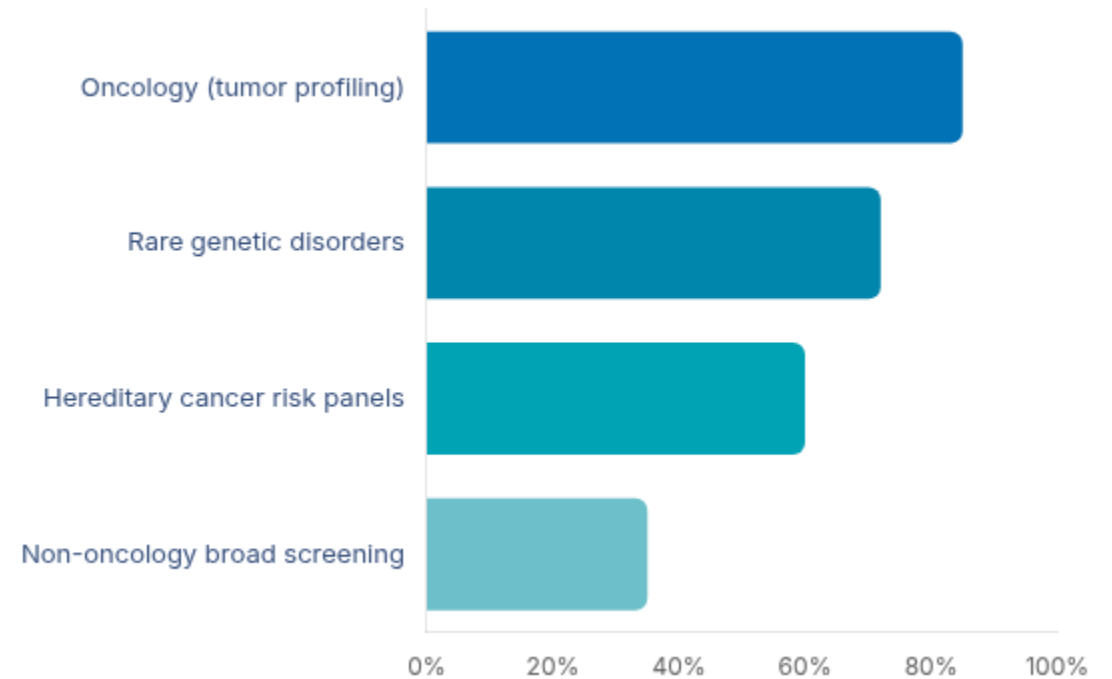


Awareness & Clinical Utility

90%

of respondents reported they are "familiar" or "very familiar" with NGS testing

Interpretation: NGS is seen as mission critical in oncology and rare disease diagnostics, while broader population screening applications remain nascent among these stakeholders.



Adoption Intent

Overall Plan to Increase NGS

68% ↑

Plan to increase NGS use in next 12–24 months



Oncologists Intent

76% ↑

Highest adoption intent among all roles



Lab Capital Investment

60% ↑

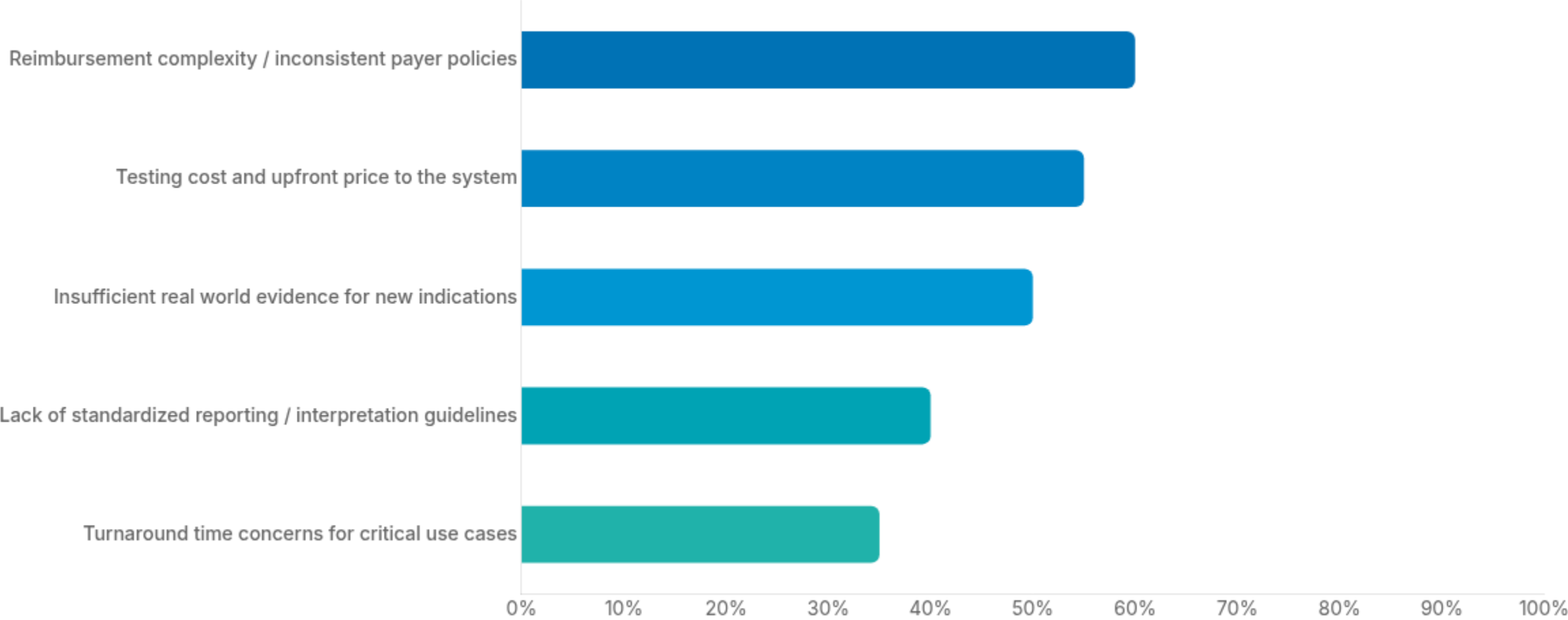
Lab directors planning investments in automation, LIMS, bioinformatics



Interpretation: Strong adoption momentum across stakeholder groups, with clinical oncology leading. Labs are making strategic capital investments to support anticipated growth.

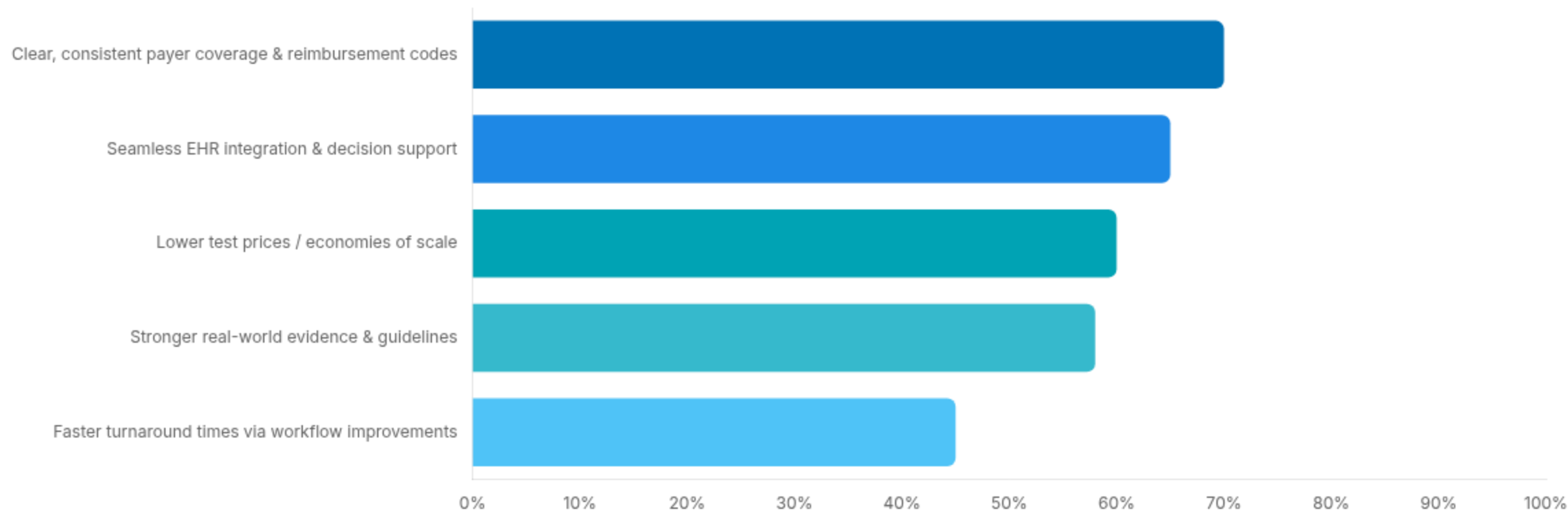
Barriers to Scale

Respondents could select multiple barriers. The top five barriers limiting broader NGS adoption:



Growth Drivers

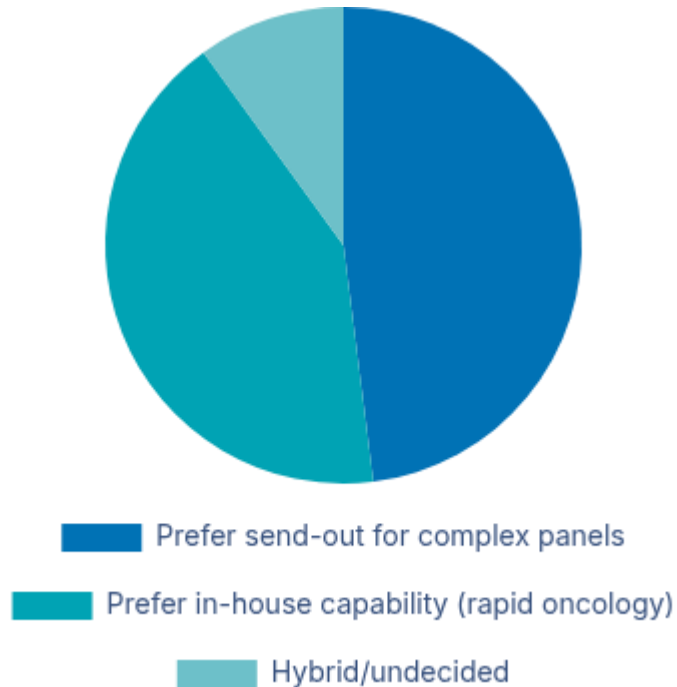
Respondents rated which factors would most accelerate NGS adoption. The following were identified as the top drivers:



Interpretation: Policy and systems integration are as important as clinical evidence. Without payer certainty and workflow fit, clinical interest will not fully translate to volume growth.

Commercial Models & Vendor Criteria

In-house vs. Send-out Testing Preferences



Top Vendor Selection Criteria

- 82%** Clinical validation & evidence
- 64%** Reimbursement support & payer contracting
- 58%** Turnaround time
- 55%** LIMS/EHR integration ease

Recommendations

For Diagnostics Companies

Build payer evidence dossiers; co-develop coverage policies with top plans.

Offer reimbursement navigation (PA templates, coding guides) and outcome guarantees where feasible.

Deliver EHR-native reports and CDS integrations; emphasize TAT and price transparency.

For Laboratories

Invest in automation, LIMS, and standardized variant interpretation; monitor TAT SLAs.

Partner for bioinformatics scalability; implement QC and harmonized reporting.

Educate clinicians with concise, tiered summaries and tumor board support.

For Payers

Clarify coverage criteria and coding; pilot value-based arrangements.

Endorse guideline-aligned indications; support RWE generation.

Implement coverage with evidence development for promising applications.

Thank You

Do you have any questions?

+91-959-915-8047

info@sperresearch.com

<https://www.sperresearch.com>

Corporate Office:

#303-304, Tower B, Noida One, Sector 62, Noida, India