THE INTEGRATION OF DATA COLLECTED BY WEARABLES IN THE PAYER EVIDENCE STRATEGY

Dr Sabina Heinz , Senior Principal Market Access, Ipsos

Andy Ballantyne, Vice President Market Access, Ipsos

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John Chambers,
Former Cisco CEO

> **Every company today is a technology company**

Is healthcare now a <u>data and technology</u> industry? If so, the implications are profound…

Audience Interactive
Question

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Has your organisation developed a digital strategy that COMPREHENSIVELY encompasses payer stakeholders AND use of RWE generated by the digital elements?

Possible answers:

01 Yes

02 No not yet, but in progress

03 No, but I think we should start

04 No, and I'm not aware of plans to address this

Working hypothesis for our current research

European viewpoints

01

Digital Health is a growing phenomenon

02

Wearables / Connected Devices have so far been leveraged in limited clinical & regulatory settings but that trend is changing

03

Drug + Device / Wearable + Service offerings will increase and payer sentiment appears to be changing

The future of health will be driven by data

Curated for biological, physiological and neurological needs

Constant monitoring to redress imbalances and maintain optimal health

Moving from reactive to pre-emptive healthcare

Digitisation of healthcare is underway & forecasted to accelerate across the decade

01 Transformation of Data Capture for Clinical Trials[1]

8 in 2000 → **1172** in 2017

Number of clinical trials started annually that include a connected digital product

02 Increase in Connected Health-related Devices[2]

48% in 2018 → **68%** in 2023

Estimated percentage of connected vs non-connected medical devices

03 Global Market Size for Connected Health Technologies[3]
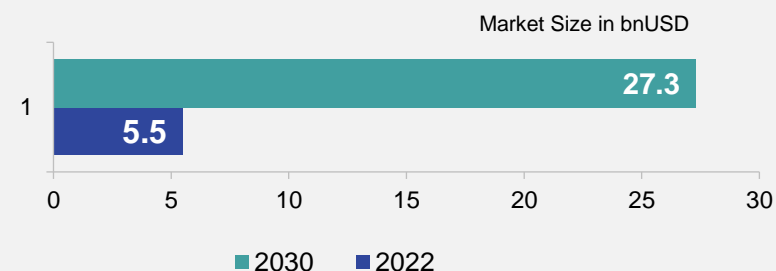
$62bn 2020 > **$298bn 2028**

CAGR 28.4%

04 Significant Growth Forecasted for 'Wearables' Medical Devices[3]

Market Size in bnUSD

	Value
2030	27.3
2022	5.5

0 5 10 15 20 25 30

■ 2030 ■ 2022

Real world data generation examples

Three key questions for payer teams:

1. How to transform digital data in the ecosystem to evidence for value recognition / commercial value

2. What level of confidence is needed for this data to be considered evidence

3. How will value be attributed in the ecosystem

Monitor – Diabetes

NIHR-funded Online Diabetes Tool Rolled Out Across NHS

NHS To Roll Out Life-changing Glucose Monitors To All Type 1 Diabetes Patients

https://www.england.nhs.uk/2022/08/nhs-to-roll-out-life-changing-glucose-monitors-to-all-type-1-diabetes-patients/

Intervention – AFib

Detection of Atrial Fibrillation in a Large Population Using Wearable Devices: The Fitbit Heart Study

The WATCH AF Trial: Smart Watches for Detection of Atrial Fibrillation

https://pubmed.ncbi.nlm.nih.gov/30784691/ and https://www.ahajournals.org/doi/10.1161/CIRCULATIONAHA.122.060291

Prediction – Oncology
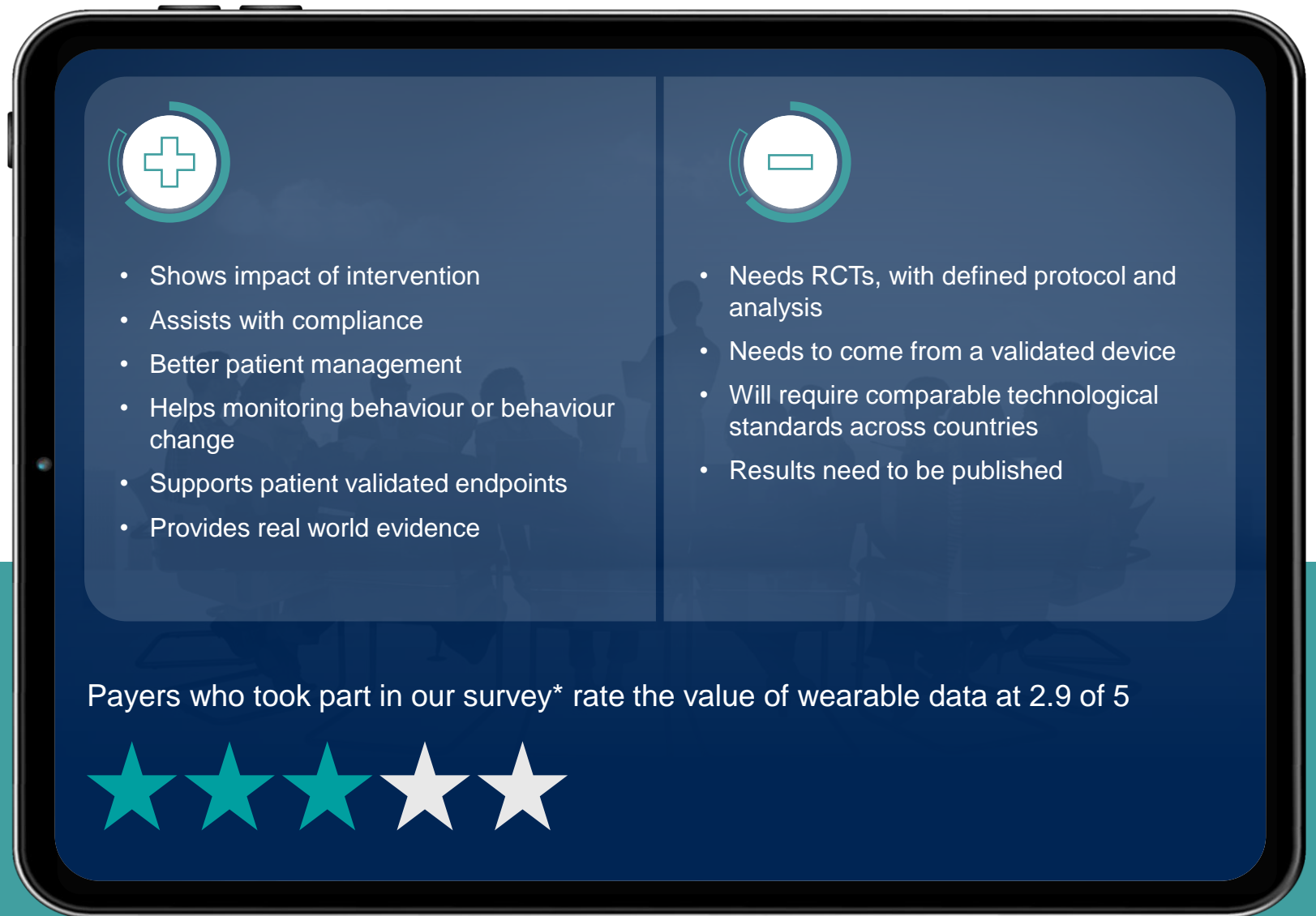
Loyalty Card Data Could Help to Identify Ovarian Cancer Sooner

Wearable Activity Monitors to Assess Performance Status & Predict Clinical Outcomes in Advanced Cancer Patients

BMJ 2023;380:p227; https://doi.org/10.1136/bmj.p227

Ipsos payer panel: Acceptance by payers of data from wearables & connected devices is currently low, however….

Consensus among payers is that this will gain relevance as long as it is a 'validated' device, e.g., a device with a CE mark, or that is reimbursed already. Some payers already consider some data from smart watches to be acceptable

- Shows impact of intervention
- Assists with compliance
- Better patient management
- Helps monitoring behaviour or behaviour change
- Supports patient validated endpoints
- Provides real world evidence

- Needs RCTs, with defined protocol and analysis
- Needs to come from a validated device
- Will require comparable technological standards across countries
- Results need to be published

Payers who took part in our survey* rate the value of wearable data at 2.9 of 5

★★★☆☆

Ipsos Payer Survey, Sample of 12 Payers from EU5, Feb 2023

What are payers looking for if data from wearables is to become evidence to support HTA submissions?

Although for many payers this data is not yet acceptable, it would be if some conditions are met

Before data from wearables can be considered, payers need to see:

- ✓ Wearable device data to obtain acknowledgement from regulatory
- ✓ Wearable data to be included in RCTs
- ✓ The data to be validated and published

HTA bodies are already aware and thinking about the impact and how such data can be integrated

Payers think that data from wearables can help with monitoring, intervention and prediction

Wearable data can help with this framework

| **Monitoring**	**Intervention**	**Prediction**
• It can aid disease management • It can provide real time data to clinicians & carers	• It can help to optimise therapeutic strategy and intervention • Reviewing/re-evaluation of therapeutic algorithm for new products	• It may protect vulnerable patient groups • It may provide valuable data for HCPs and carers

Payers in our survey could see most potential for chronic diseases
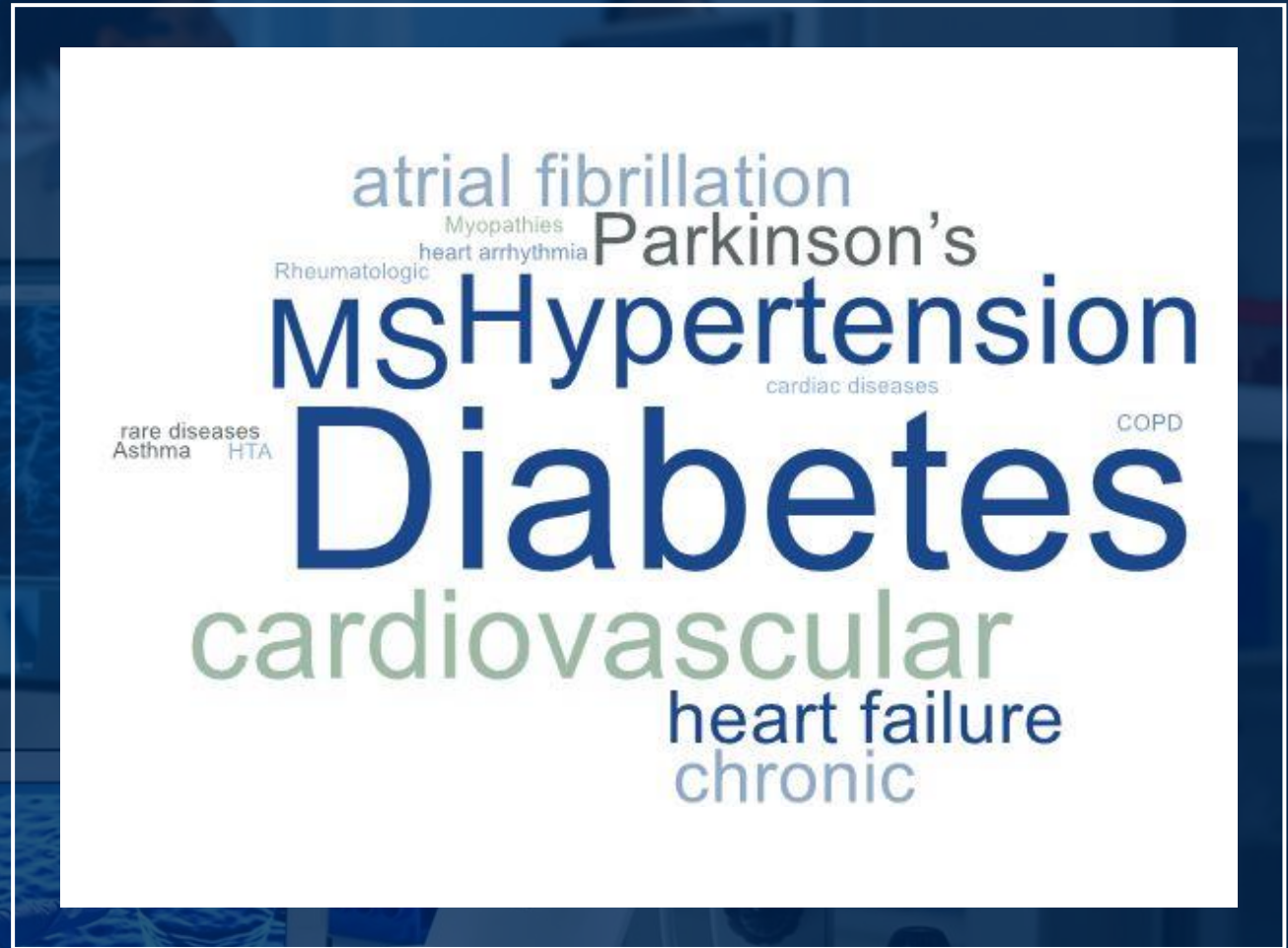
Payer attitudes changing in Europe

— *have we reached an inflection point?*

Ability to Implement**

Willingness to accept device data*
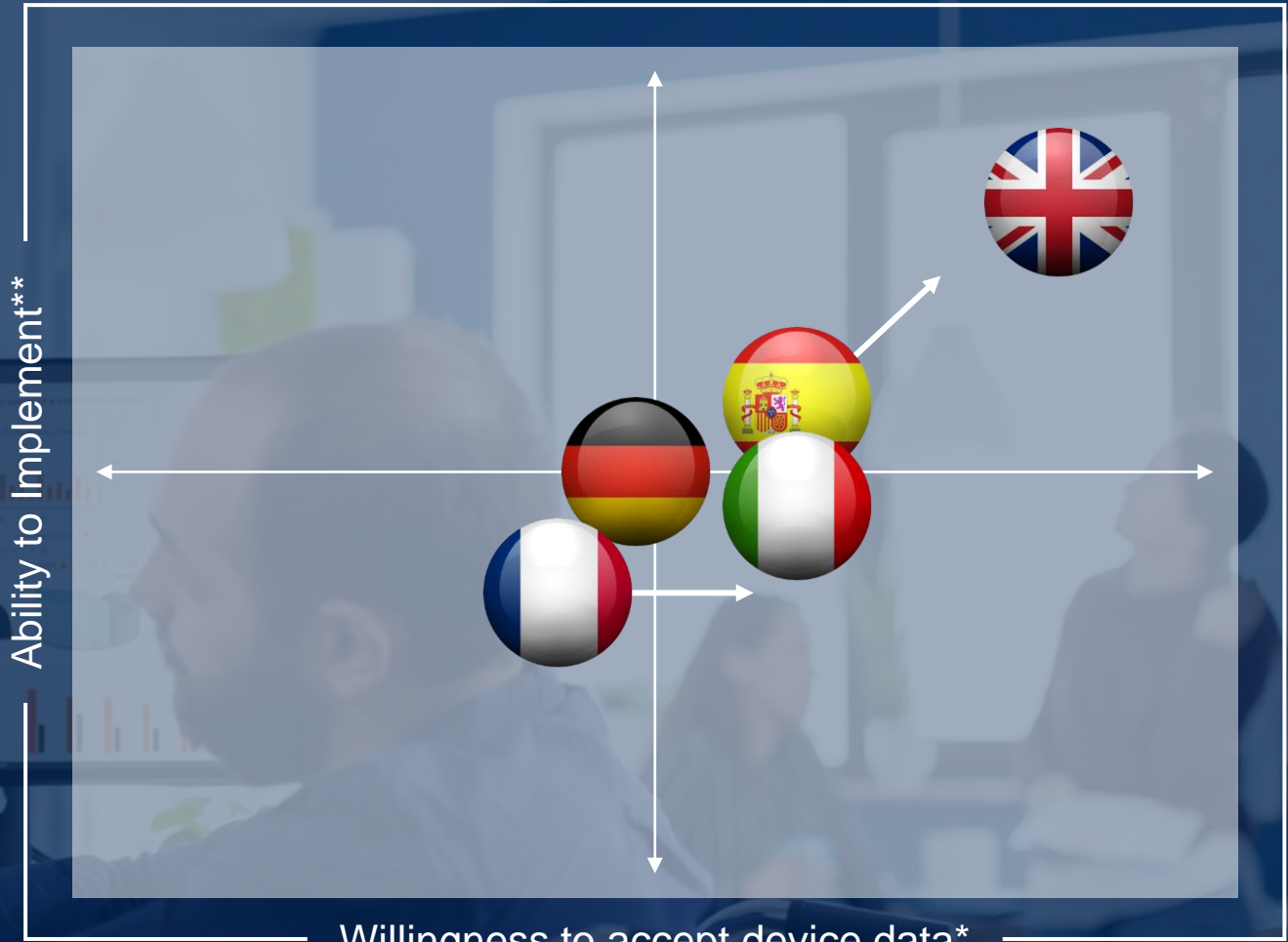
Source: Ipsos Payer Research, Feb 2023

*for HTA or reimbursement

**Composite of status of Infrastructure, regulatory vehicles, HTA guidance and realised examples in the market

Implications: Clearest near-term opportunities are in Diabetes, CVMD, HT & MS

01

The Digital Health train is arriving at the station, so you need to at least be holding a ticket…

- Payers beginning to see the benefit of 'digital evidence' and role of 'wearables' data
- Differences across EU mean selective investment needed & pace of uptake will vary

02

Companies need to think about their holistic digital evidence strategy

- i.e., pathway from RCT to RWD to RWE to continuous value demonstration?

03

You need to understand the ecosystem & it's players

- Can you leverage ecosystem partner data to create structured RWD?
- Can the RWD become RWE for a payer?

04

Could conditional reimbursement become more routine?

- Could you execute using your validated digital RWD?
- What useful dimensions does wearable data bring to your data pool?
- How could this enhance or enrich your RCT evidence?

Next steps for companies

A ASSESS

- The eco-system in which you are operating
- Which device data enhances disease specific endpoints & can be collected via a digital ecosystem?
- Start building knowledge as early as possible; does your organisation need to invest?
- **Who is already a data provider?**

B BEGIN PAYER EDUCATION

- To help them become more confident in reliability, generalisability of such data and its validity with key academic groups
- **Seek out opinions early**

C COLLABORATE

- With tech companies, Dx companies, DMP providers, physician groups and academia
- Collaborate at both the 'Front End' & the 'Back End'
- Work with groups such as Get Real, EHDEN, EUNetHA & EIT Health
- **Pharma may not have all the relevant data**

D DEFINE MILESTONES & GOALS

- How will you measure your progress to your goals?
- Which are the critical milestones towards launch?
- **What are your KPIs for success?**

Audience Interaction
Question

❓

How likely is it that your organisation will expand its use of digital data collection for RWE through the use of wearables in the next 2-5 years?

💬 **Possible answers:**

01   Highly likely

02   Somewhat likely

03   Unlikely with wearables, but maybe other digital data sources

04   No digital data collection planned