

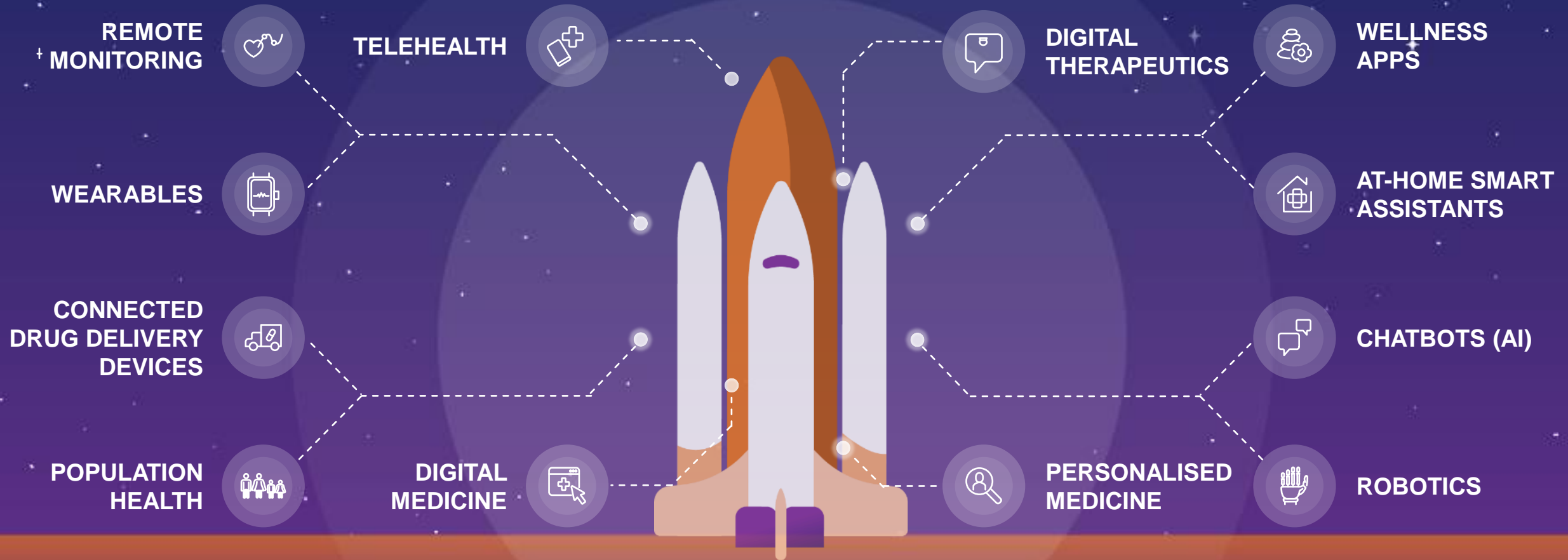
IPSOS DIGITAL & CONNECTED HEALTH

Digital Evidence Value Pricing Access

March 2023



Areas we cover across the digital health spectrum:



Ipsos is well-equipped to be your strategic partner in Digital and Connected Health

DIGITAL & CONNECTED HEALTH EXPERIENCE

Extensive industry knowledge with

80+

**PROJECTS COMPLETED
SINCE 2020**

35+

**EXPERTS WITH A
DEDICATED GLOBAL TEAM**

of medical technology, healthcare and digital health specialists

**GLOBAL COVERAGE
OF CONSUMERS,
PATIENTS, PAYERS,
AND HEALTHCARE
PROFESSIONALS**

Ipsos is a leader in digital health market access & more...

We regularly publish new research

THE UNREALISED POTENTIAL OF DIGITAL THERAPEUTICS IN THE UK



AUTHORS:

Chris Teale, Senior Vice President, Market Access
Reena Sooch, Head of Digital and Connected Health



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

World Evidence Pricing and Access Congress, Amsterdam, March 2023



Artificial intelligence, molecular diagnostics, and their role in optimizing disease management

Authors: Lawrence Hill and Iona Kininmonth, Ipsos Advisory

Data Advisory

Artificial intelligence (AI) has the transformative potential to improve healthcare outcomes. Through maturation of AI algorithms the applications across healthcare have increased significantly. Algorithms gained more traction through Covid-19 and AI was an accelerator for digital healthcare¹.

AI can drive efficiency, cost saving and personalised medicine with early diagnoses. We are already seeing higher adoption and investment in AI. It offers the possibility for healthcare to be more accessible and will proactively progress systems to more equitable outcomes². However, there are ongoing concerns around robustness, security, transparency and safety.

Market Access

AI evidence requirements of Regulators and Payers are constantly evolving

Accuracy and robustness are key determinants and must be proven to demonstrate improvement of outcomes for patients. At the moment, there are multiple other metrics relevant in the evaluation of AI for use in healthcare, such as: fairness, interoperability, traceability, usability, robustness and explainability³.

However, some countries are starting to adopt evidence requirement frameworks for AI and data-driven technologies, e.g. the UK published their NICE evidence standards framework in August 2022⁴.

Strategy3

Market for AI in medical diagnostics³



To a market value of \$9.38 bn by 2029



Strategy3

AI opens a world of possibilities

Healthcare systems across the world are facing recurring issues that may be alleviated, in part, by implementing AI. By automating workstreams many of the following issues can be addressed in a more efficient way to allow HCPs to perform more urgent tasks:

- Research
- Administration
- Early detection
- Diagnosis
- Ongoing care
- Monitoring

The Monitor Intervene Predict Value Framework: A Structured Approach to Demonstrating How Digital Health Can Improve Health Outcomes and Reduce Burden of Illness

Christopher W. Teale, II, BSc, Ipsos, London, United Kingdom

Major hurdles will need to be overcome if digital health is to deliver value for all stakeholders (eg. patients, payers, physicians, pharmaceutical companies, and diagnostic/digital device/software developers)

Value attribution will become increasingly important for informing who should pay or be paid (reimbursed), how much, for what, and when

These issues need to be addressed if multi-element "personalized" approaches (involving both digital and genomic technologies) are to enhance the efficiency of healthcare delivery and make disease management more effective

Digital health, by linking patient-level real-world/real-time data—sourced through digital monitoring, interventional disease management, and predictive analytics, together with precision medicine/biomarker informed treatment—is likely to improve economic, clinical, and humanistic outcomes

Healthcare is evolving rapidly. Last year, ISPOR published its "2022-2023 Top 10 HEOR Trends." These included using real-world evidence in healthcare decision making, value assessment to inform value-driven healthcare decisions, artificial intelligence, and advanced analytics. Complementary research¹ undertaken by Ipsos indicates that healthcare is becoming more "connected" with multiple components (eg. digital patient-level, real-world/real-time monitoring; software, algorithms, and apps informing interventions, analytics predicting outcomes, and genomics/biomarkers informing therapy choice) in the future, value will increasingly be delivered by multicomponent disease management rather than by drugs or interventions in isolation.

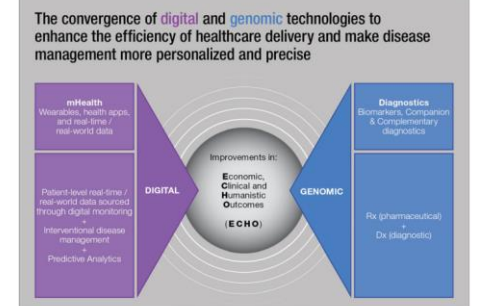
The gradual evolution and fusion of biomarker-informed disease management (eg. genomics/proteomics with companion and complementary diagnostics indicative of disease or treatment response), real-time informed disease management (eg. digital health

technologies and wearables), and intelligent smart disease management (eg. advanced analytics, software, algorithms, and artificial intelligence), with all components having both diagnostic and predictive elements, is opening up opportunities to enhance the efficiency and effectiveness of healthcare delivery by making treatment more personalized and precise (Figure 1).

This will create challenges for value, price, and health technology assessment and will require new approaches to value evidence generation and value attribution. Of increasing interest are digital health technologies addressing monitoring, intervention, and prediction (see left-hand side of Figure 1).

The first challenge surrounds speed of evolution. Technology is evolving faster than the regulatory, behavioral, healthcare funding, and health technology assessment (HTA) systems that are required for successful implementation.

Figure 1. The convergence of digital and genomic technologies



At Ipsos, we bring together experts from market access, strategic advisory, UX, consumer, patient and healthcare sectors to deliver you a best-in-class integrated offer.



We are a global, cross discipline team with a broad range of skills from advisory to research

From rapid research to agile approaches at scale



COMPLEMENTED BY INNOVATIVE IPSOS TEAMS AND OFFERINGS:

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- *Qualitative observation & activation*
- Advanced analytics
- Multi-source data integration
- Proprietary real-world data & norms
- Brand health (Brand Vision™)
- and more!

We are experts who work seamlessly together



STRATEGIC ADVISORY

In order for any business strategy, marketing plan, brand positioning, or new innovation to be successful, it must do three things: be rooted in the organisation's strategy, be informed and inspired by customer research, and drive through to actual in-market activation. While there are many firms that advise on growth, very few deliver on all three.



MARKET ACCESS

The complete spectrum of market access & HEOR services, powered by payer insights, economic modelling and global syndicated real-world evidence.



USER EXPERIENCE & HUMAN FACTORS

We are a team of researchers, design thinkers, developers and artists constantly thinking about the human experience. Over the years, we have helped our clients create their first ecommerce experiences, their first mobile apps, their first digital medicines, and their first AI-driven support chatbots.



MARKET RESEARCH

Global qualitative and quantitative market research & insights capabilities – delivered by a global team of over 1,200 healthcare experts with specialisms across medical devices and diagnostics, oncology, respiratory, rare diseases and more.

----- *Connected Health*

We have syndicated data available: Digital Doctor



Provides a deep understanding and tracking of how HCPs' behaviour & attitudes towards digital & connected health have evolved

Digital Doctor is a multi country survey among primary care doctors worldwide, focusing on changes in behaviour & attitudes.

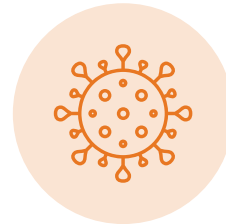
Digital Doctor has been running since 2015, providing unique insights on HCPs' behaviours and how these are evolving. Our last two waves ran before and during the COVID-19 pandemic, capturing the changes and shifts in attitudes and behaviours of doctors. The question remains: will this change continue? And if so, how? We will be exploring this question in the coming waves!



CLICK TO ACCESS:
<https://www.ipsos.com/en/digital-doctor-2021-0>

QUESTIONS WE CAN HELP YOU ANSWER FROM LAST WAVE – AND A PEEK OF WHAT'S COMING!

Impact of COVID-19



Connected Health



Telehealth



Channel use



71%

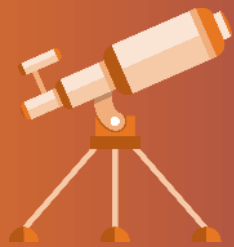
of primary care physicians agree that remote consultations (virtual care) are the future of healthcare – and their use of telehealth has rapidly increased since 2020.

Base: All respondents (n=1,454), Fieldwork conducted Nov '20 – Feb '21



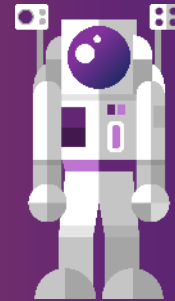
And we can help you answer a wide range of your business questions

3... 2... 1... How can we get you to take-off, from business scoping to solution development, to go-to-market support?



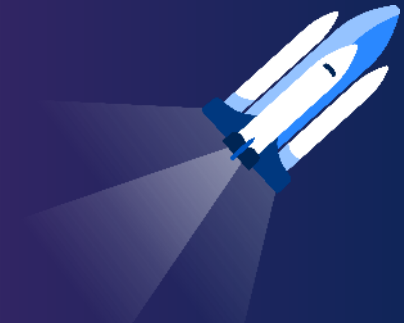
COMMERCIAL STRATEGY

Analyse the market to understand the exact sweet spot for your business



INNOVATION AND LAUNCH EXCELLENCE

Understand HCPs' and patients' needs and develop your digital health solutions, leveraging an inter-disciplinary, evidence-led approach and user-centred design



PERFORMANCE OPTIMISATION

Roll-out and monitor the launch of your digital health solutions to ensure continued optimal performance

COMMERCIAL STRATEGY



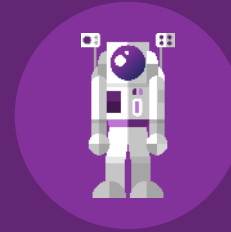
MARKET CONTEXT

- Technology landscaping
- Market assessment
- Knowledge curation
- Expert/KOL interviews

COMPANY

- Capabilities mapping
- M&A Analysis

INNOVATION AND LAUNCH EXCELLENCE



UNDERSTAND

- Ethnographic studies
- Social listening
- Online communities

DEFINE

- Problem / Market sizing
- HCP / patient segmentation

IDEATE

- Design thinking/Ideation workshops
- End user co-creation

VALIDATE

- User experience (UX) testing
- Concept testing
- Real world app/device testing

PERFORMANCE OPTIMISATION



GO-TO-MARKET

- Market access
- Go-to-market strategy
- Message optimisation
- Launch excellence strategy
- Performance excellence
- KPI monitoring

CONTACT US



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