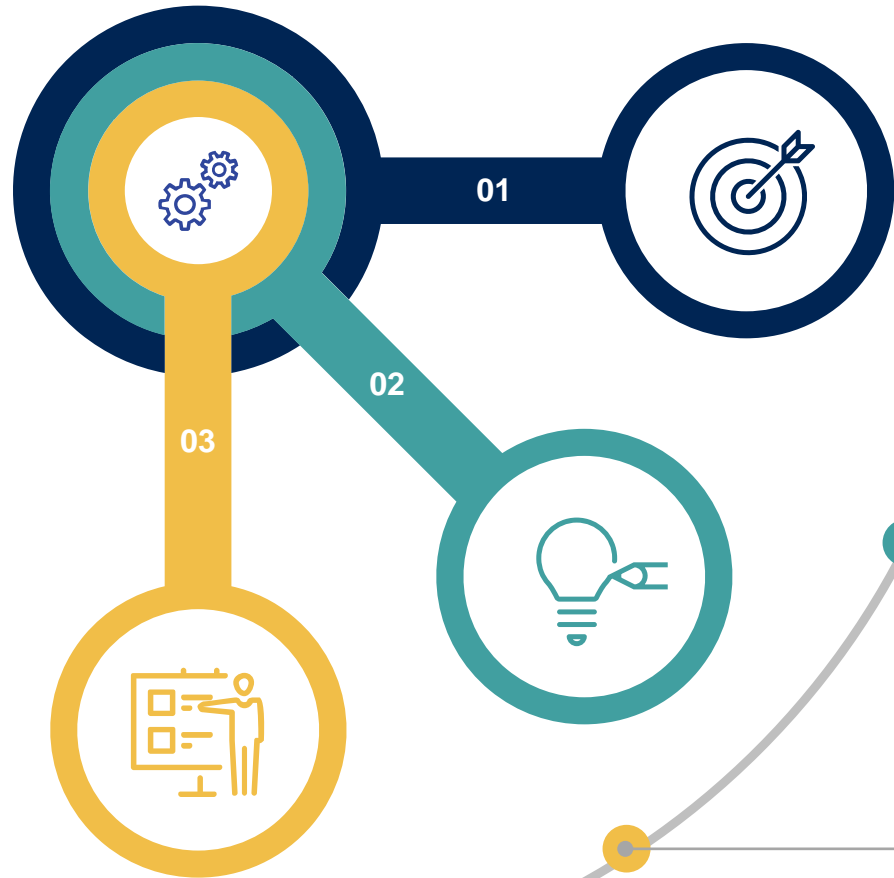


Future Development and Access trends in Oncology: Challenges & Solutions

27th September 2023

Recap and summary

We collaborated with our clients to understand their perception of the challenges in oncology and explored potential ways to address them



The Purpose

There has been much discussion recently about current trends in healthcare, but less about the impact of these trends on health outcomes, affordability and sustainability, or on the healthcare industry. To consider the challenges and solutions, we wanted to get the pharma industry's view on how to address 30 of the biggest challenges in oncology.

The Process

We invited our UK-based clientele to attend a 4-hour workshop hosted at our London office. The event commenced with Ipsos' sharing their distinctive perspectives to initiate a group discussion. The attendees were then engaged in an insightful and responsive exchange, prompted with relevant questions to express their thoughts and ideas and explore synergies between the corps.

The Result

After careful evaluation, we came to a joint conclusion on the key challenges impacting the oncology therapeutic area and potential solutions - which sparked further discussion on implementation and collaborative approaches in the industry. We have summarised the key findings of the discussion in this report.

In our workshop held at the end of September, we discussed the effects of current healthcare trends on oncology

We have identified 30 significant challenges that must be overcome, and achieving success will necessitate significant systemic, stakeholder, and organisational change. We aim to create an output centred on the opinions of the pharmaceutical sector, supported by a range of perspectives to share insights:



Key development and access challenges in oncology

What challenges will the key trends bring between 2023-2030 and how to overcome them

01



Moving towards optimised cancer treatment

The increasing use of drug therapy at early stages, personalised treatment and sequencing strategies

02



Navigating the poly-crisis

What can we learn from the global macrotrend landscape and implications for oncology

03



Trends in real-world evidence

How data can be used to demonstrate the true value of a brand

04



Joining the dots...

Developing holistic approaches in healthcare strategy to maximise access and commercialisation

05

We have convened several Ipsos specialists to present a short talk on key topics and facilitate a discussion in the room



Market Access



**Oncology Centre
of Expertise
Amy Butcher**



**Trends & Foresight
Nick Chiarelli**



**Non-Interventional
Studies
Joern Kleebach**



Strategy3

Mark Pritchard
Associate Partner

Andrew Ballantyne
Vice President

*Senior Director, Head of
UK Custom Oncology*

Principal

Global Head of NIS

andrew.ballantyne@ipsos.com

amy.bucher@ipsos.com

nick.chiarelli@ipsos.com

joern.kleebach@ipsos.com

mark.pritchard@ipsos.com

Alessandra Franceschetti

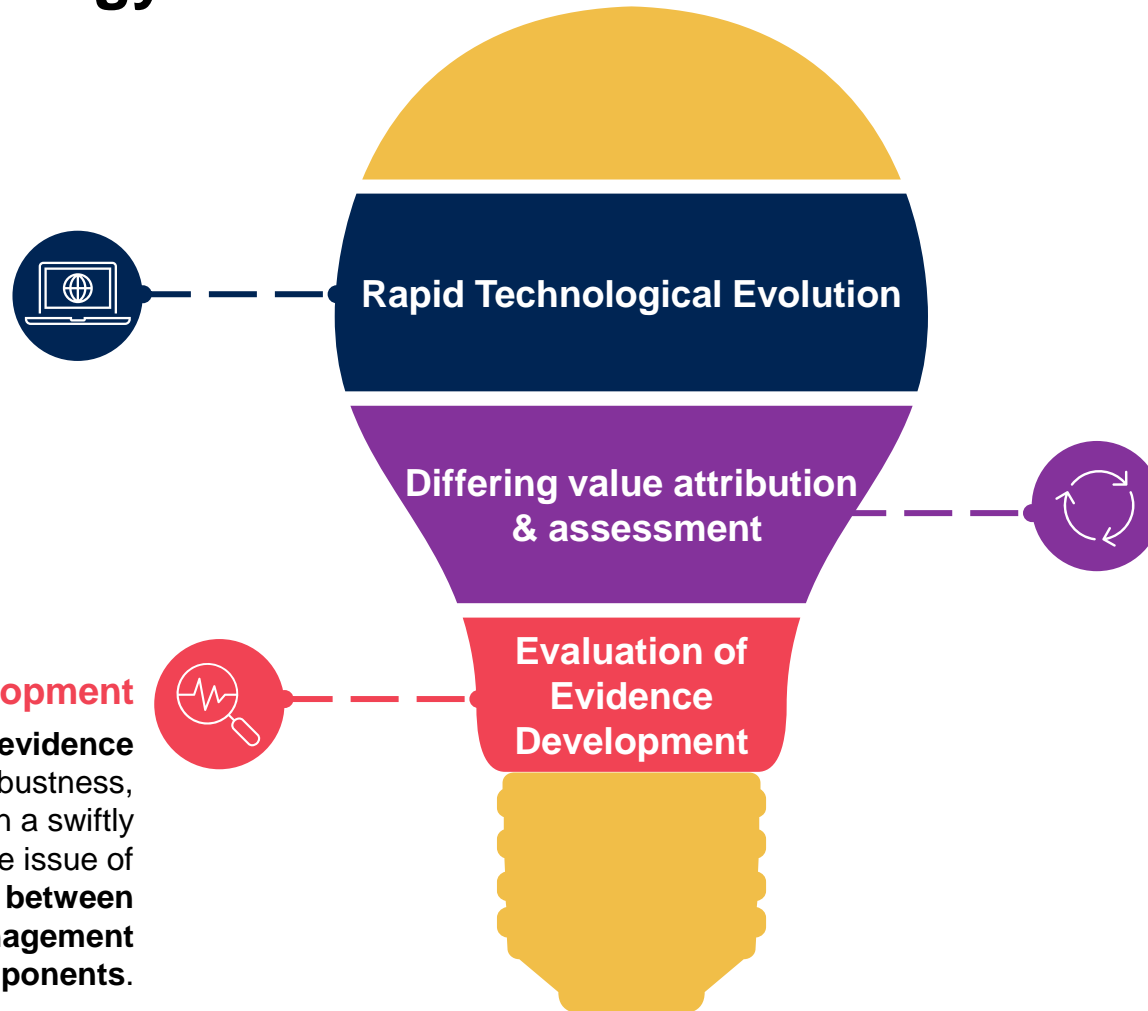
*Senior Director, Global
Oncology*

alessandra.franceschetti@ipsos.com

The main hurdles and opportunities will lie in the personalisation of healthcare, where difficulties need to be overcome to ensure the triumph of digital health technology

Rapid Technological Evolution

- **Technology is advancing quicker** than the regulatory, behavioural, and healthcare financing environment, **leading to a widespread lack of depth of understanding of the technologies** involved & *the implementation challenges associated with new technologies.*
- The **recognition and alignment of patients with the appropriate technology** within the portfolio is of utmost importance.



Evaluation of Evidence Development

Challenges to the development of evidence include factors such as relevance, robustness, rigor, cost, timeliness, and validity in a swiftly changing environment, as well as the issue of **measuring and attributing value between different disease management components.**

Differing value attribution & assessment

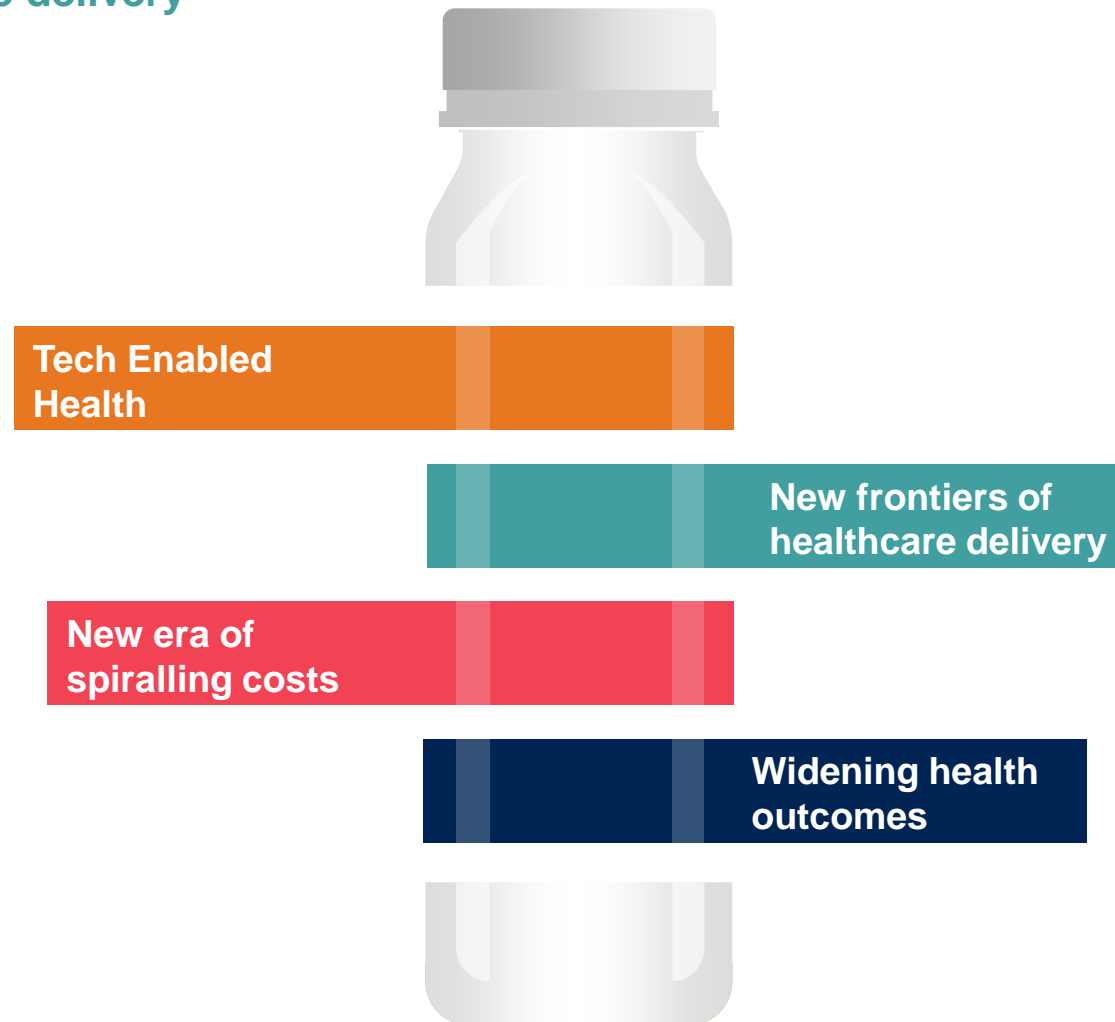
- The differences that arise are caused by the **differing nature of monitoring, intervention and prediction**; the **economic, clinical and humanistic nature of the segmentation**; and the **different perceptions of the three stakeholder groups**: patients, physicians and payers.
- **Educating patients and physicians** about these differences will enable more precise personalisation.
- The awareness and views of doctors regarding relevant products can narrow or broaden the treatment approach, which is why it is important to **manage payer perceptions by working closely with physicians.**

Macro forces drive changes across markets and individuals, impacting their lifestyles, perception of healthcare and their response to health issues

The new frontiers of healthcare delivery

The private sector

- There is a **rising willingness to pay for private healthcare** and a growing market for private oncology treatment (although tumour type dependent) **due to macroeconomic changes**, which varies according to factors such as age, location and marital status.
- The amount people are willing to spend on healthcare, where Oncology usually ranks, is also a factor to consider, as much as the **social and economic impact of cost avoidance for further treatments**, signalling the need for a more holistic view.
- **Employee benefits are increasingly playing a role** in private healthcare, and Gen Z might show interest in this.
- **Willingness to co-pay varies** depending on the therapeutic area and severity of the condition.



A shift in the patient pathways

- There is a **potential for nurses and pharmacists to be trained to administer certain therapies** to manage burden on hospitals
- **Moving surgeries out** of the primary setting
- **Self-referrals**, i.e., smokers having an X-ray by a certain age, were discussed.
- The conversation also touched upon the **ease of testing and checking**, where **machine learning could be potentially utilized**.

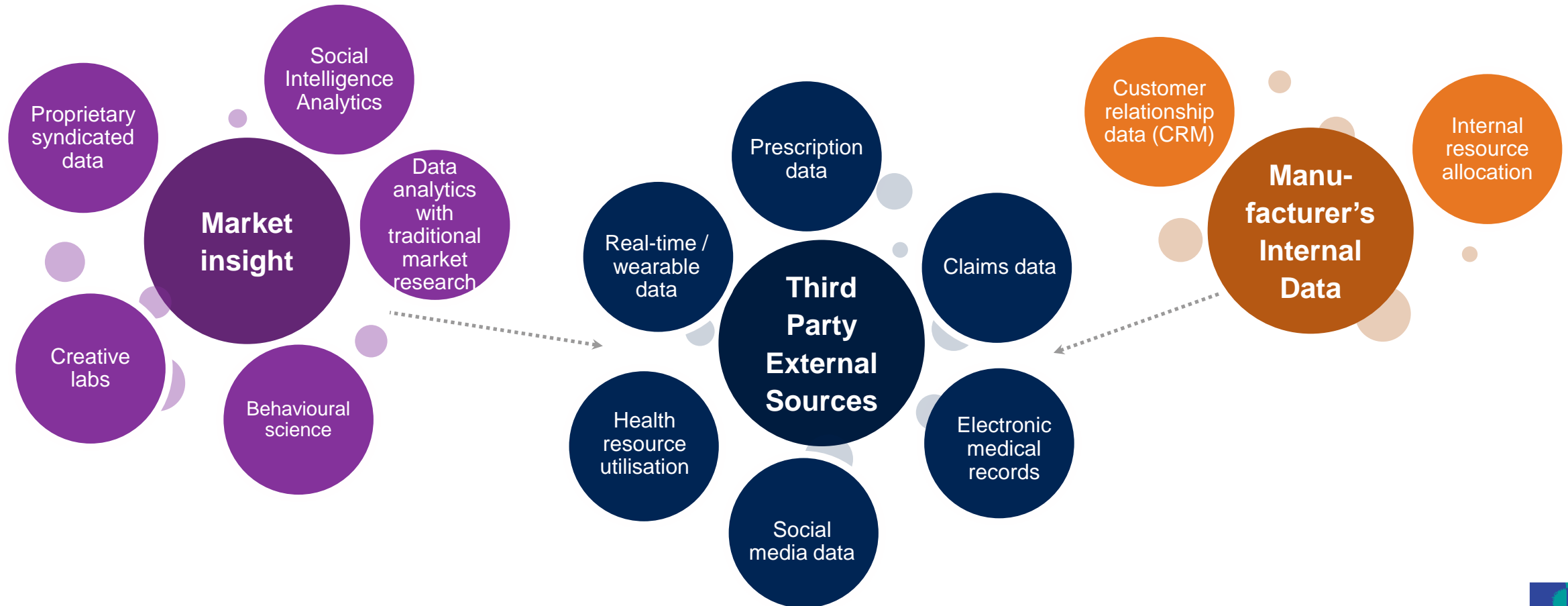


With rising concerns about data sharing, the need for careful data integration was emphasized, as currently, useful datasets are often isolated.

To best assist value generation, healthcare data transparency needs better debate, the formation of more 'honest brokers' and allowing more patient choice regarding trade-off benefits of releasing anonymised personal data that may support better access to Oncology treatments

In the continually evolving landscape of Oncology, unstructured data is anticipated to become a pivotal component in future developments

The potential involvement of honest data brokers, who concentrate on associating clinical results with the suitable patients in appropriate settings could enhance trust and acceptance for payers.



The utilization of RWE in negotiations potentially could aid to differentiation in the UK and other target markets... *where acceptability is improving*

The concept of conditional approvals from complementary studies suggests a misplacement of interventional studies. Identifying the pan-market usefulness will be crucial.

Data quality

support is required for **local infrastructure development**, creation of electronic medical records, registries, etc.
The matter of data quality is worrisome, and there is a **need for transparency and trust** to gain maximum benefits.
To overcome gaps in knowledge, it is advised to **analyse the usage practices of RWE in other countries**.

Access

to data is necessary to support research questions. This can be achieved through **partnerships with data providers and academic teams**, as well as having **access to claims data**.
Studies on the burden of disease and unmet needs, along with patient preference studies that adopt conjoint analysis, are becoming more prevalent. These studies can **reshape public or KOL opinions** and are typically deemed to be more **reliable and credible** than traditional market research.



Forum

to **exchange and collaborate** between stakeholders, private-public initiatives (e.g., REALISE project).
A **steering committee** involving regulators and HTA representatives would be a viable option **to learn from other fast-pace developing industries**.

Robustness

of methods – **setting guidelines and minimum standards; education of stakeholders** in the pharma industry, agencies and payers.

Policy

outlining the **requirements and promoting transparency** at a pan-European level could aid in **standardising data quality and reducing variations in RWE utilisation** across countries.

Significant systemic, stakeholder, and organizational barriers will need to be overcome to successfully address evidence, pricing & access challenges

The future development and access trends in Oncology are expected to be influenced by a multitude of factors, including improving understanding of technology, data management, policy shaping, and fostering collaborations.

Innovative pricing strategies

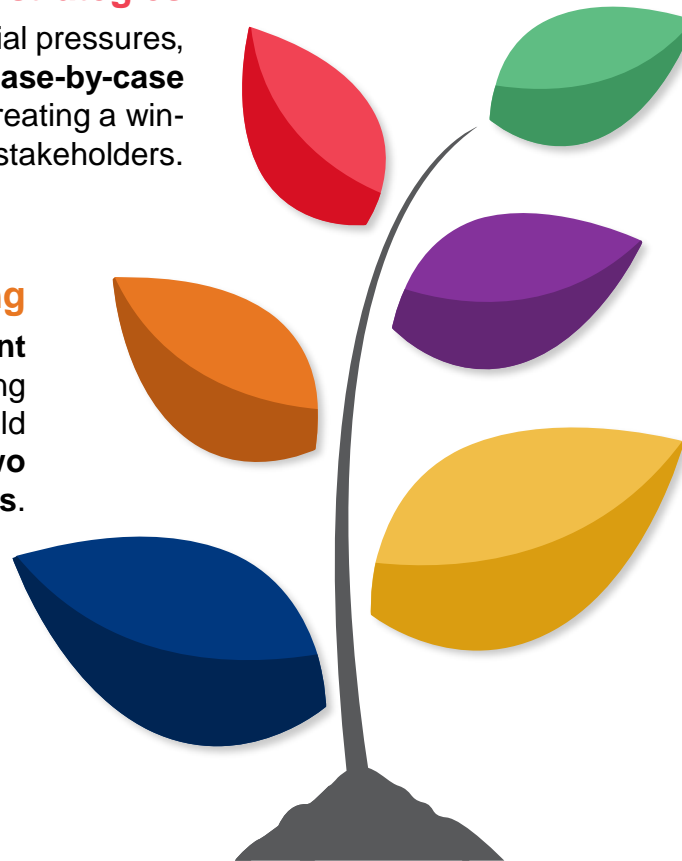
Funding flows will need to change to relieve financial pressures, where **more innovative pricing strategies, like case-by-case risk sharing agreements** will play a crucial role creating a win-win situation to all stakeholders.

Policy shaping

The concept of **population health is an important topic to discuss with politicians**, where enforcing change and the **pressure applied by PAGs** should be **initiated early** and should **target one or two high-priority areas**.

Fundamental changes

To overcome the challenges of evidence availability, accessibility and acceptability, **effectively managing uncertainty** could yield tangible advantages.



New evidence requirements

Non-comparative data, plus modelling solutions, will increasingly be required. Sometimes the evidence is not fully understood or mature, indicating the importance of **achieving a deeper level of accuracy and understanding about surrogate markers in relation to OS**

Industry collaboration

The importance of running **collaborative partnerships** not just within the industry and systems, but also **internationally and with payers** for the benefit of patients could allow all parties **to take on bigger risks**.

Drivers of change: patients and KOLs

New methods must be employed to aid decision-makers in comprehending **the catalysts for change**. Constructing a comprehensive outlook and **collaborating closely with hospitals, Key Opinion Leaders** and clients could generate significant benefits.

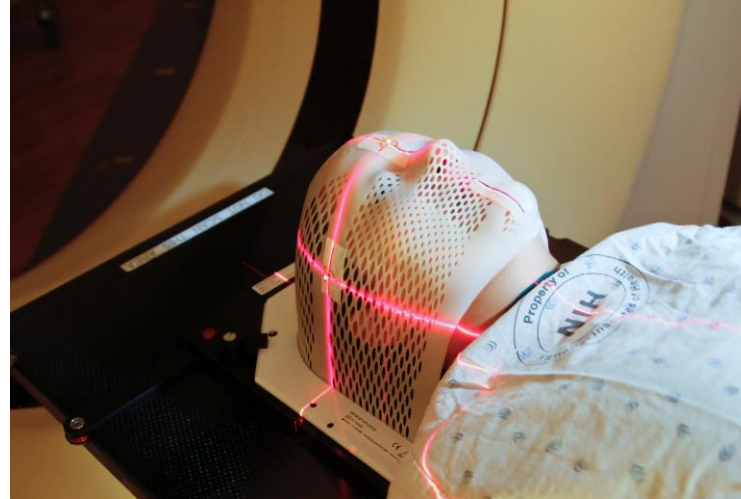
Trust (and lack thereof) between stakeholders was identified as a significant issue that needs to be addressed to foster better collaboration.



In summary, the conversation highlighted the need for more data, collaboration, trust, and effective negotiation tactics in the future



Innovation is something that is achieved, it is not something that we do. Rather than thinking about creating innovation, we first must **understand what we are trying to achieve** and what is stopping us from being successful. Then by identifying what we need to be successful we may **adapt our process, product or service** rather than having to create something completely new.



A thorough **understanding of healthcare strategy trends and stakeholder 'careabouts' and their potential implications for the industry** is critical to developing robust, **holistic solutions** that create positive commercial impact, value and access for patients, HCPs and payers.

Differences exist between the **clinical trial environment and the real world**, where **greater engagement** between pharma and healthcare providers is needed.



Collaboration across disciplines with e.g. Key Opinion Leaders, hospitals, customers, regulators, and HTA representatives plus cross functional working inside pharma is critical to being able to connect functional strategies in an innovative fashion, stakeholders can work together **providing a different lens and context** to improve access to oncology treatments, accelerate commercialization, and ultimately make a positive impact on patient outcomes in the field of oncology. **Trust between society and the pharmaceutical industry is crucial.**

Strategic Recommendations: A Consultancy Perspective from Ipsos



Topics worth further exploring

Can we afford to expand personalised therapy?

- **Costs:** *Does personalized therapy save money in the healthcare system by treating patients with therapies they are likely to respond to?*
- **Psychological aspects:** *Can we offer enough psychological support to help patients and their families cope with the emotional burden of relaying personal health information and personalized cancer treatments? Can we talk more about holistic definitions of health that include mental health?*
- **Technology:** *New evidence suggests that AI has a role in cancer diagnosis, but is it better, faster? What is the impact on trust?*
- **Equity:** *Do inequalities of healthcare outcomes apply strongly in such a major and profound challenge as cancer? Is prevention applicable to oncology and more preventative approaches to healthcare, considering that only those with adequate means can be truly proactive about their health?*

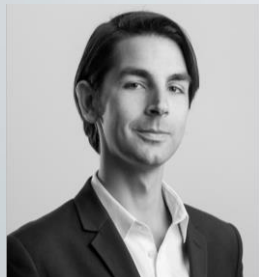


At Ipsos, we firmly believe that anticipating challenges and identifying solutions nurtures a better understanding of the environment in which we work, enabling proactive planning and market-shaping activities

We welcome your ongoing engagement and opportunity to discuss further:

- If you're interested in delivering a similar type of workshop, or
- You would like to build on this workshop outcome and further explore different perspectives, or
- Any of the questions were thought-provoking and would like to further explore, or
- You have a new aspect that would be worthwhile to dig deeper.

Your Ipsos representatives facilitating *'Future Development and Access Trends in Oncology'* workshops throughout Europe:



Mark Richards

Principal / Business
Development Lead

Market Access

Mark.richards@ipsos.com



Andy Ballantyne

Vice President

Market Access

Andrew.Ballantyne @ipsos.com

Please feel free reach out to discuss further! We are passionate about outcomes

ABOUT IPSOS

Ipsos is the third largest market research company in the world, present in 90 markets and employing more than 18,000 people.

Our research professionals, analysts and scientists have built unique multi-specialist capabilities that provide powerful insights into the actions, opinions and motivations of citizens, consumers, patients, customers or employees. We serve more than 5000 clients across the world with 75 business solutions.

Founded in France in 1975, Ipsos is listed on the Euronext Paris since July 1st, 1999. The company is part of the SBF 120 and the Mid-60 index and is eligible for the Deferred Settlement Service (SRD).

ISIN code FR0000073298, Reuters ISOS.PA, Bloomberg IPS:FP

www.ipsos.com

GAME CHANGERS

In our world of rapid change, the need of reliable information to make confident decisions has never been greater.

At Ipsos we believe our clients need more than a data supplier, they need a partner who can produce accurate and relevant information and turn it into actionable truth.

This is why our passionately curious experts not only provide the most precise measurement, but shape it to provide True Understanding of Society, Markets and People.

To do this we use the best of science, technology and know-how and apply the principles of security, simplicity, speed and substance to everything we do.

So that our clients can act faster, smarter and bolder.

Ultimately, success comes down to a simple truth:

You act better when you are sure.

“**Game Changers**” – our tagline – summarises our ambition to help our clients to navigate more easily our deeply changing world.