IQVIA INSTITUTE FOR HUMAN DATA SCIENCE

# Advances in Clinical Development in Oncology

**Pre-ESMO 2022 Live Symposium & Livestreamed Webinar**

**Paris, France**

**9 September 2022, 9-11 a.m. CET**

DigiCore

IQVIA Oncology Center of Excellence

IQVIA INSTITUTE FOR HUMAN DATA SCIENCE

**Advances in Clinical Development in Oncology The IQVIA Institute for Human Data Science, in collaboration with DIGICORE, the Digital Institute for Cancer Outcomes Research, and the IQVIA Oncology Center of Excellence, has hosted a pre-ESMO symposium to discuss advances in clinical development in oncology.**
**The event draws upon a recent report published by the IQVIA Institute – Global Oncology Trends 2022 – and features a panel of industry thought leaders in oncology who are focused on the promise, research challenges, and care implementation of precision medicine, a major focus for the European Cancer Mission.**

Link to On-Demand Webinar & Symposium Agenda:
https://event.on24.com/wcc/r/3882034/0347B549004805E7387162C1B62C84AC

# Advances in Clinical Development in Oncology: Pre-ESMO 2022

**The live webinar will begin at 9:30 CET.**

In the meantime, please see these important notes and reminders:

| Q&A | Enlarge live view | Frozen screen | Download reports | View on-demand |
|---|---|---|---|---|
| You may ask a question at any time by clicking on the Q&A icon and submitting. | For an enhanced view, click the small box located in the gray frame above the slide window. | If you are not seeing the slides at any point, please refresh your browser. | Find link to related Institute reports in the resource list located at the bottom of your screen. | The webinar is being recorded and will be available on-demand at the same link after the live session. |

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# A word from our local host

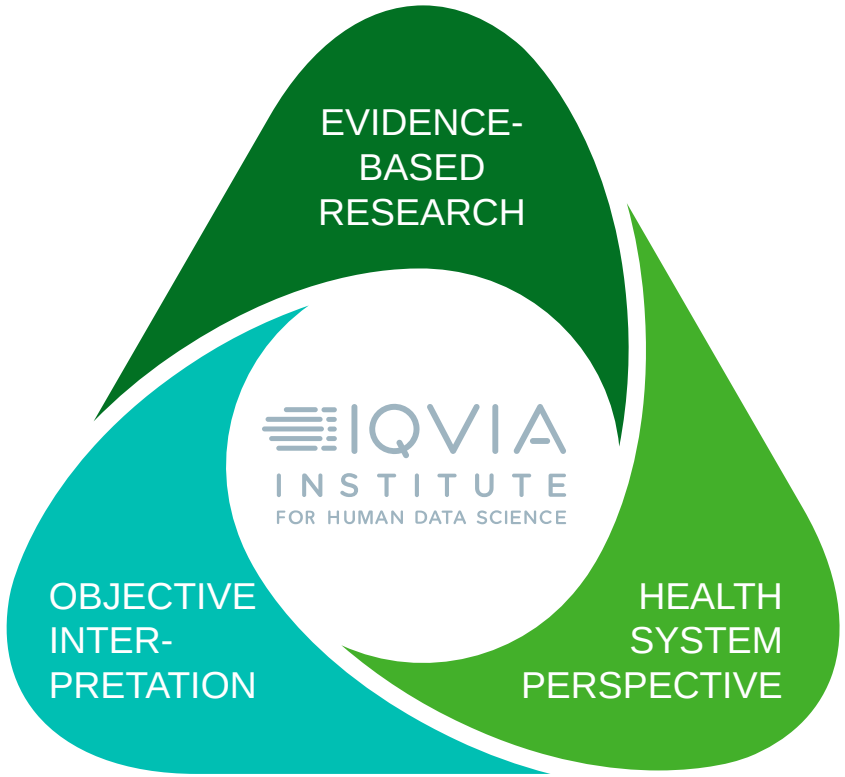
Welcome to our live event from **PariSanté Campus in Paris, France.**

Pr Antoine Tesnière

Directeur de PariSanté Campus

# IQVIA Institute for Human Data Science contributes to advancing human health by generating rigorous, evidence-based research

- PROPRIETARY DATA SOURCES*
- SUBJECT MATTER EXPERTS
- ADVANCED ANALYTICAL SKILLS
- THIRD PARTY INFORMATION
- ACADEMIC PARTNERS
- EXTERNAL EXPERTS




- **LIBRARY** OF REPORTS
- **CONFERENCES** AND **FORUMS**
- PEER-REVIEWED **RESEARCH**
- **PRESS AND SOCIAL MEDIA** ENGAGEMENT

*No confidential sponsor or customer data is accessible or used

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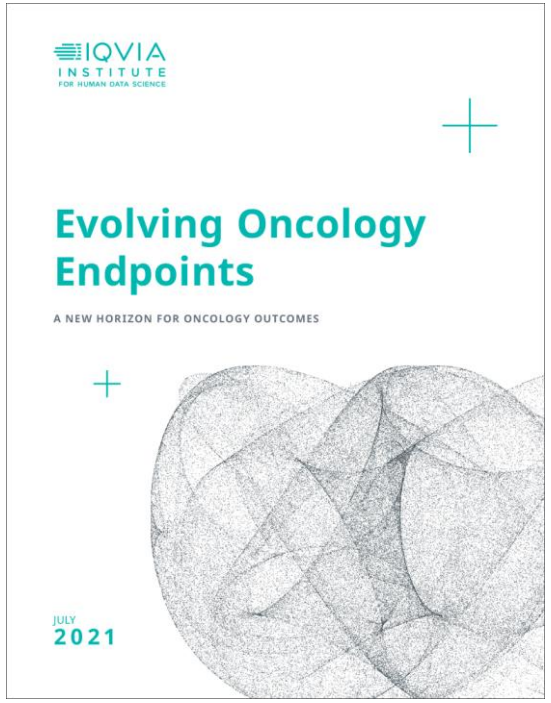
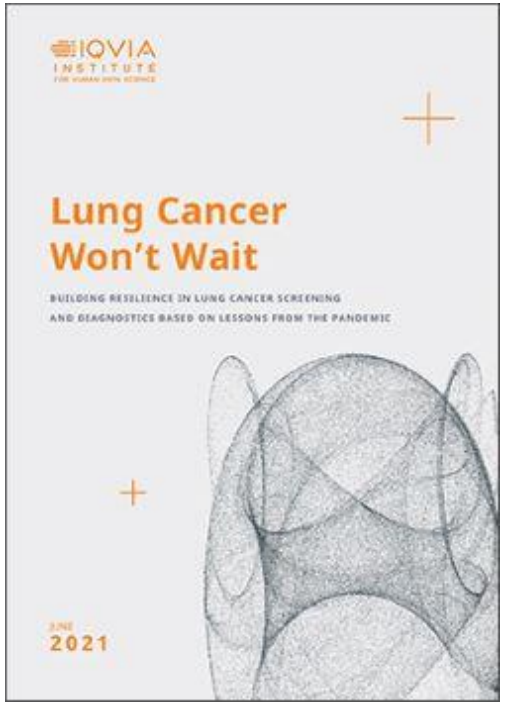
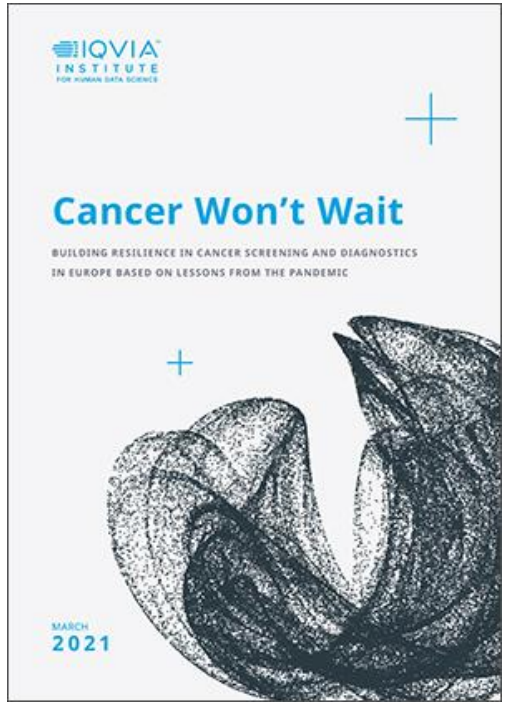
# Institute oncology-related reports and exhibits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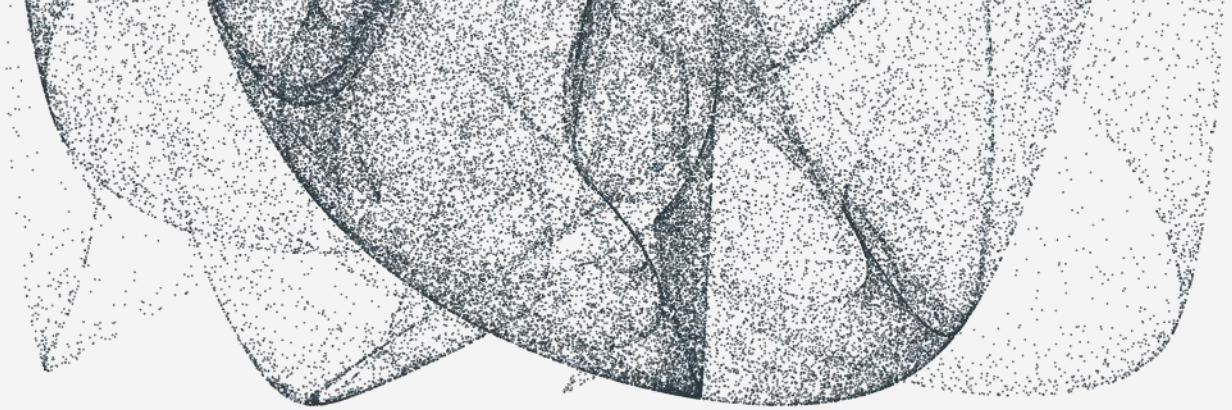


# Agenda

| | |
|---|---|
| + 09:30 – 09:35 | Introduction of panelists |
| + 09:35 – 09:55 | Discussion: Expectations around ESMO 2022 |
| + 09:55 – 10:05 | Summary highlights from *Global Oncology Trends 2022* – Clinical trial activity and productivity |
| + 10:05 – 10:30 | Discussion: Precision oncology-based clinical trials<br>Discussion: Clinical trial endpoints in oncology |
| + 10:30 – 10:35 | Summary highlights from *Global Oncology Trends 2022* – Cancer patient access to and use of scientific advances |
| + 10:35 – 10:55 | Discussion: Implementing precision medicine in national health systems: Bringing new developments to practice and to patients |
| + 10:55 – 11:00 | Closing comments |

# Panelists

**Åslaug Helland, MD, Ph.D.**
*Oslo University Hospital*

**Prof Tony Mok, MD**
*Chinese University of Hong Kong*

**José Luis García, MD, Ph.D.**
*Sr Medical Strategy Director, IQVIA Oncology COE*

**Ebba Hallersjö Hult**
*Vision Zero Cancer*

**Bettina Ryll, MD**
*Melanoma Patient Network Europe*

**Moderator: Murray Aitken**
*Executive Director, IQVIA Institute for Human Data Science*

**Iwona Ługowska, MD, Ph.D.**
*Maria Sklodowska Curie National Research Institute of Oncology*

**Piers Mahon, Ph.D.**
*Senior Principal, IQVIA*
*Manager, DIGICORE*

# Discussion: Expectations around ESMO Congress 2022

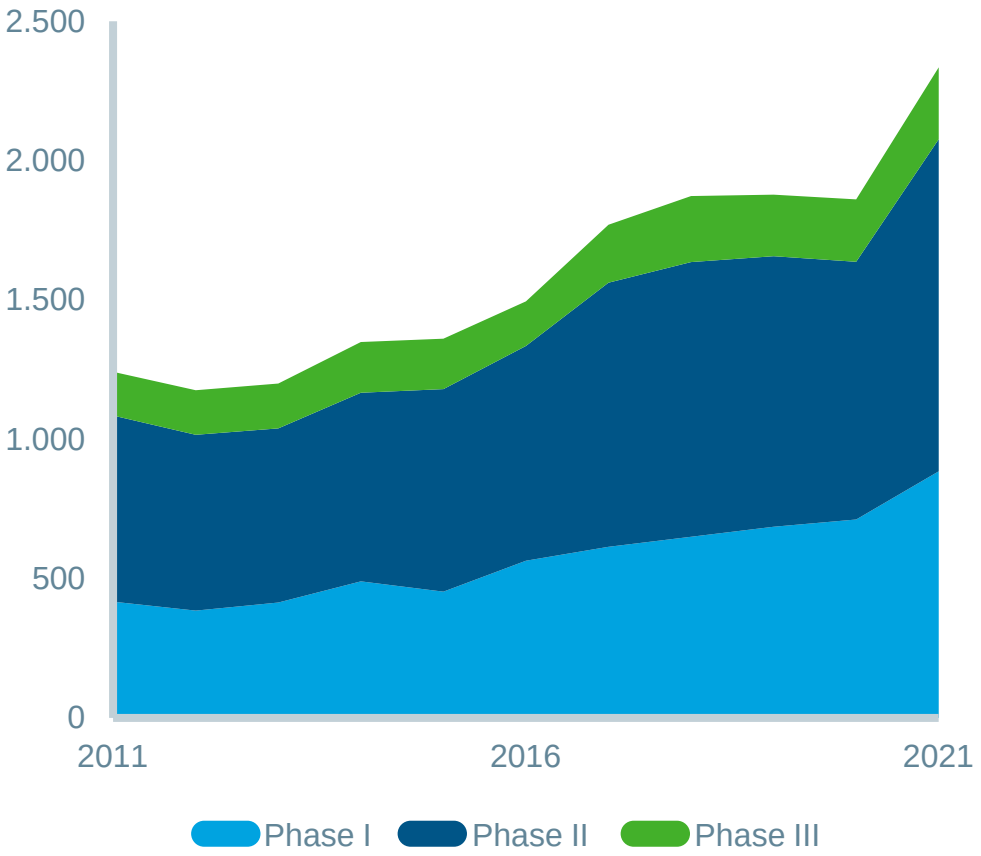
# Clinical Trial Activity and Productivity

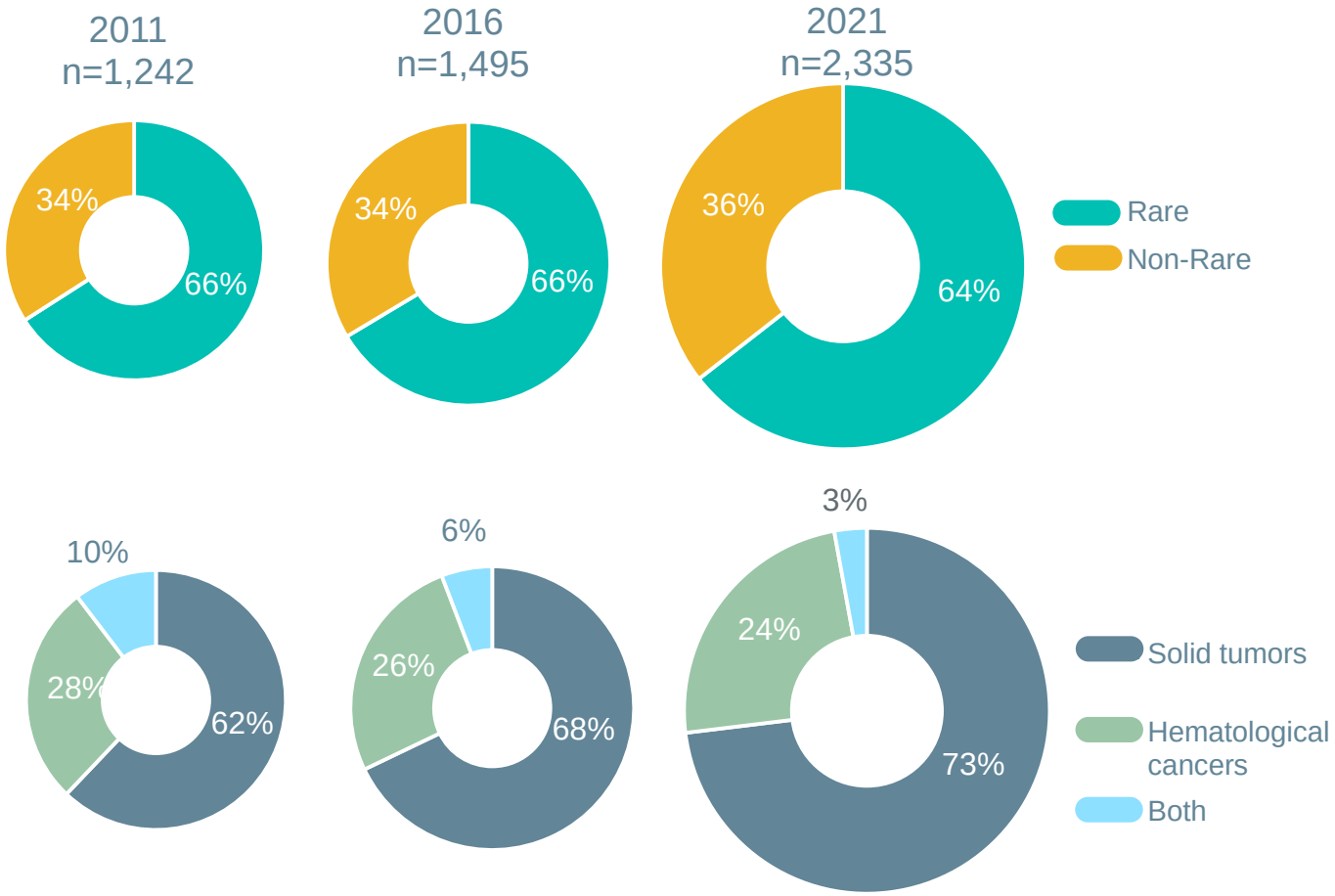
# Clinical Trial Activity and Productivity Observations

- Heightened stress on stakeholders and system due to rapid expansion of activity
  - Regulators, investigators, site staff, sponsors
- Intensified competition among sponsors to secure investigators, sites and study participants
  - Emerging biopharma competing with large pharma
- Increased risk during clinical development phases being assumed and managed as greater scientific risk taken to achieve breakthrough improvements
  - Offsets through protocol design and trial execution improvements
- Greater complexity in defining and pursuing trial endpoints
  - Clinical and value oriented
- Rising standards for development programs resulting in newly launched drugs
  - First-in-class, accelerated approvals, novel trial designs

# Oncology trial starts reached historically high levels in 2021, up 56% from 2016 and mostly focused on rare cancer indications

*Oncology clinical trial starts by year, 2011−2021*

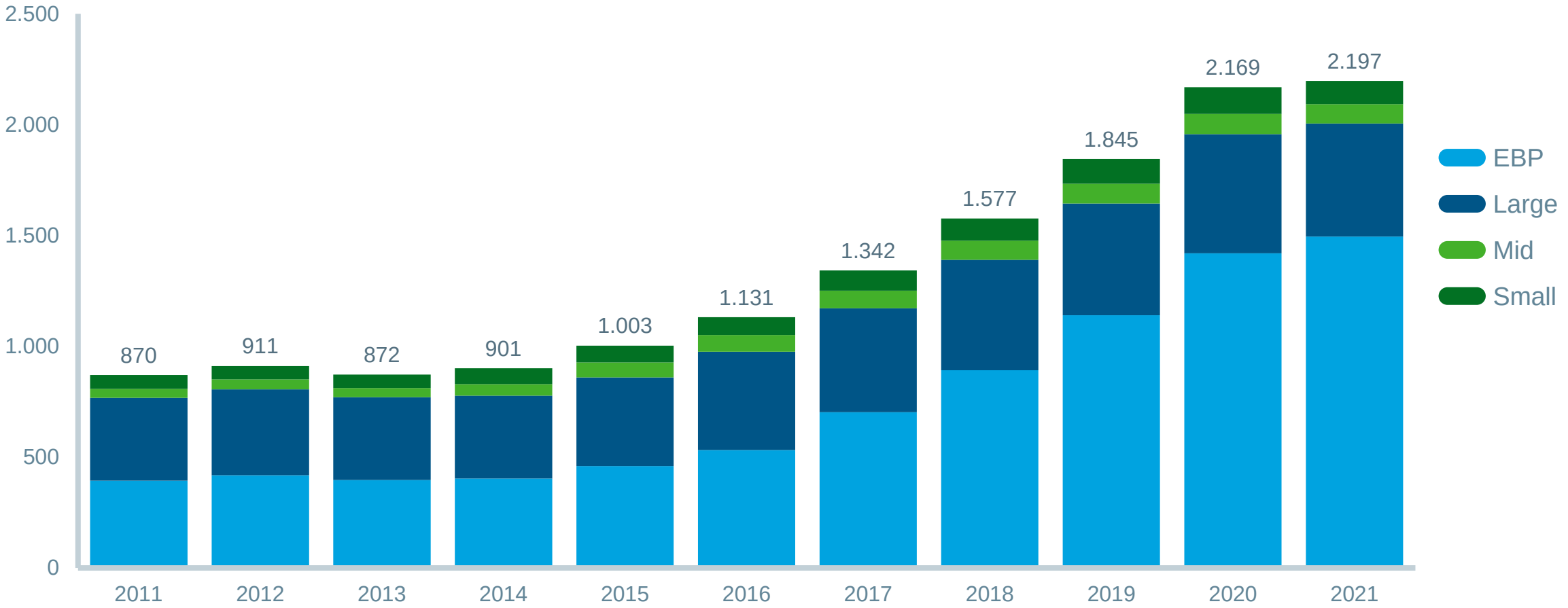



Source: Citeline Trialtrove, IQVIA Institute, Apr 2022.
Global Oncology Trends 2022: Outlook to 2026. Report by the IQVIA Institute for Human Data Science

# Emerging biopharma companies were responsible for 68% of the oncology pipeline in 2021, up from 45% a decade ago

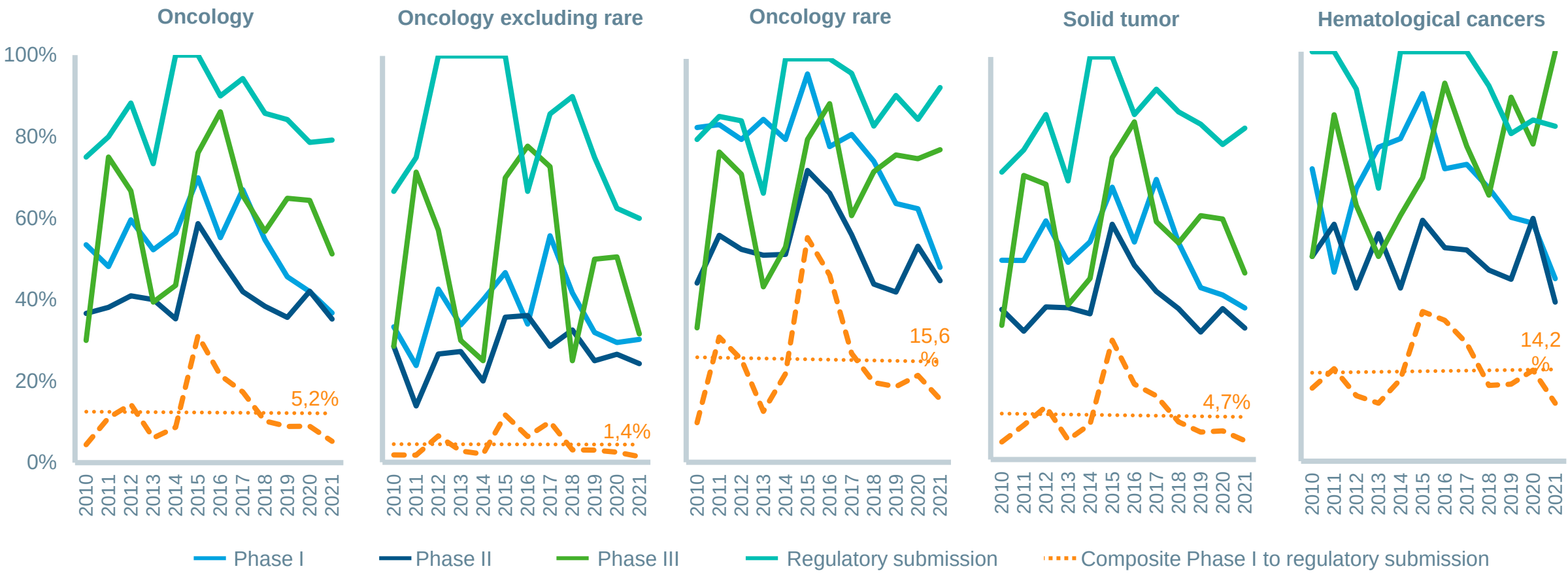
*Number of Phase I to regulatory submission oncology pipeline products by company segment, 2011–2021*




Source: IQVIA Pipeline Intelligence, Dec 2021; IQVIA Institute, Apr 2022.
Global Oncology Trends 2022: Outlook to 2026. Report by the IQVIA Institute for Human Data Science

# Composite success rates in oncology have been trending down since 2015 while rare oncology remains the highest

*R&D phase and composite success rates by therapy area in 2010−2021*




Source: IQVIA Pipeline Intelligence, Dec 2021; IQVIA Institute, Apr 2022.
Global Oncology Trends 2022: Outlook to 2026. Report by the IQVIA Institute for Human Data Science

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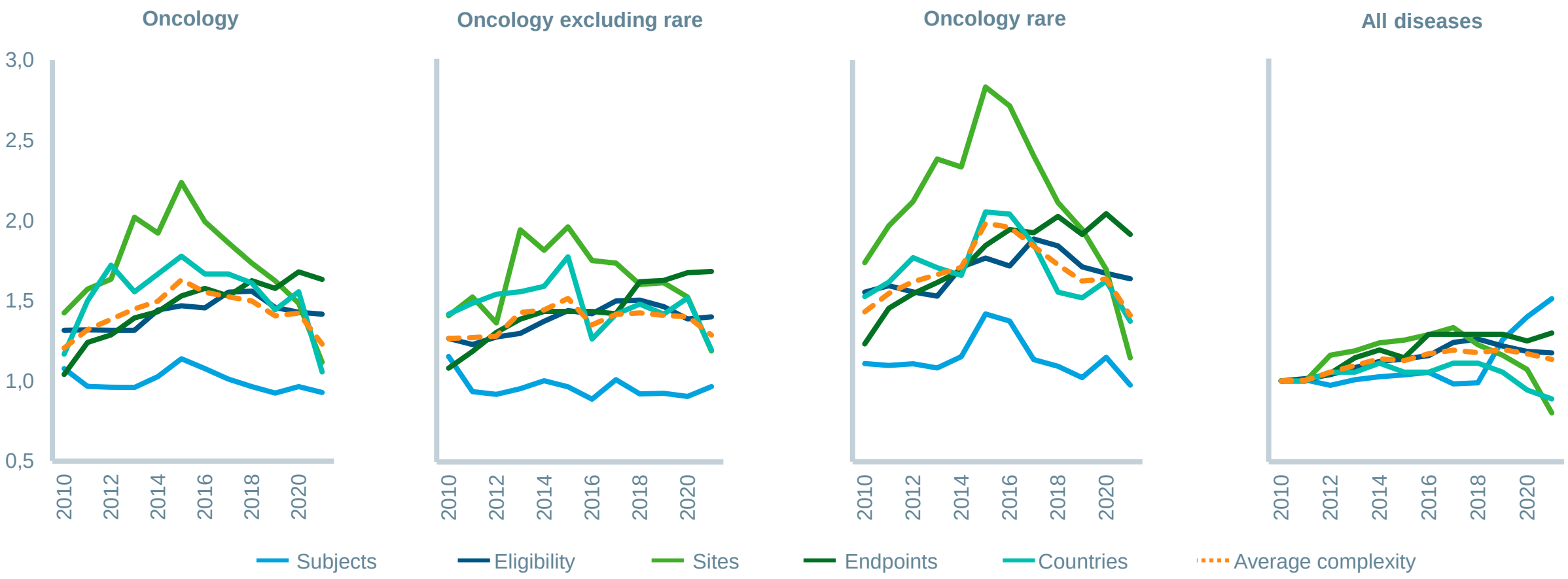
# Oncology trials are substantially more complex than other disease areas but are often able to have fewer subjects

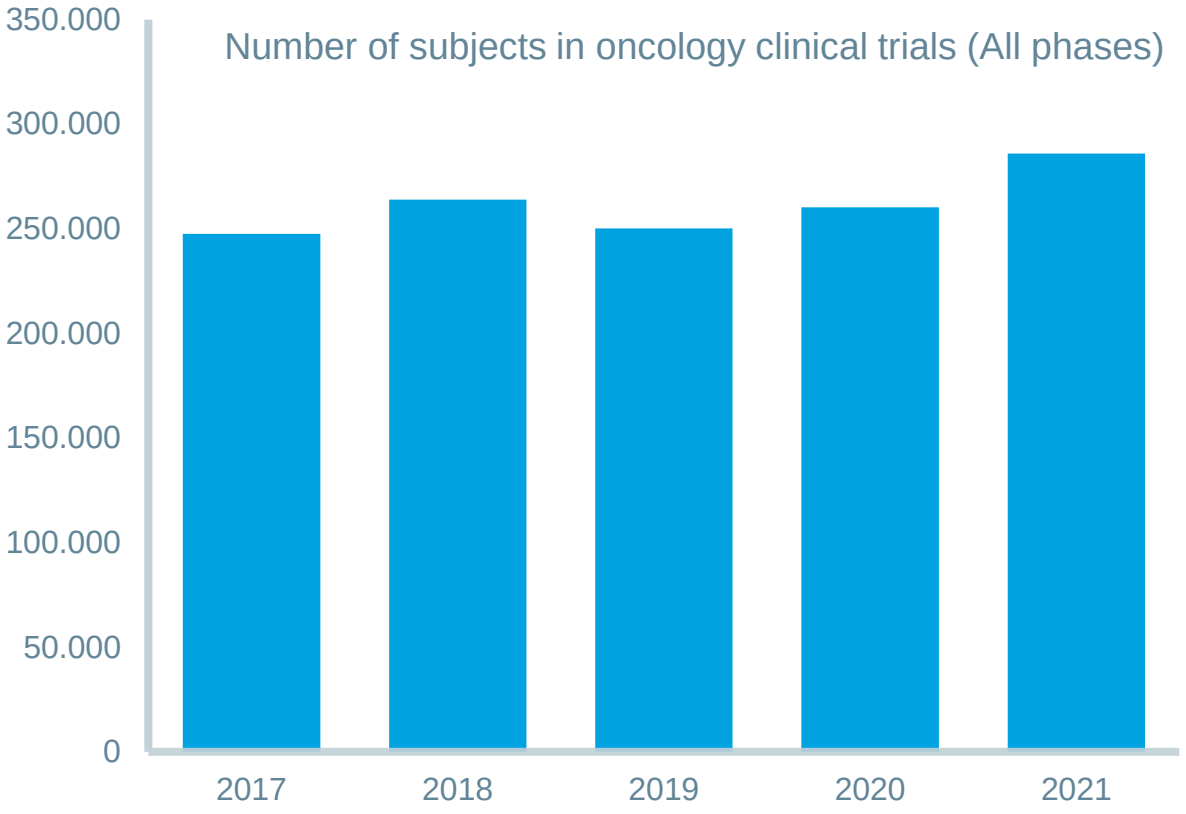
*Trial complexity by element and therapy area, 2010–2021*

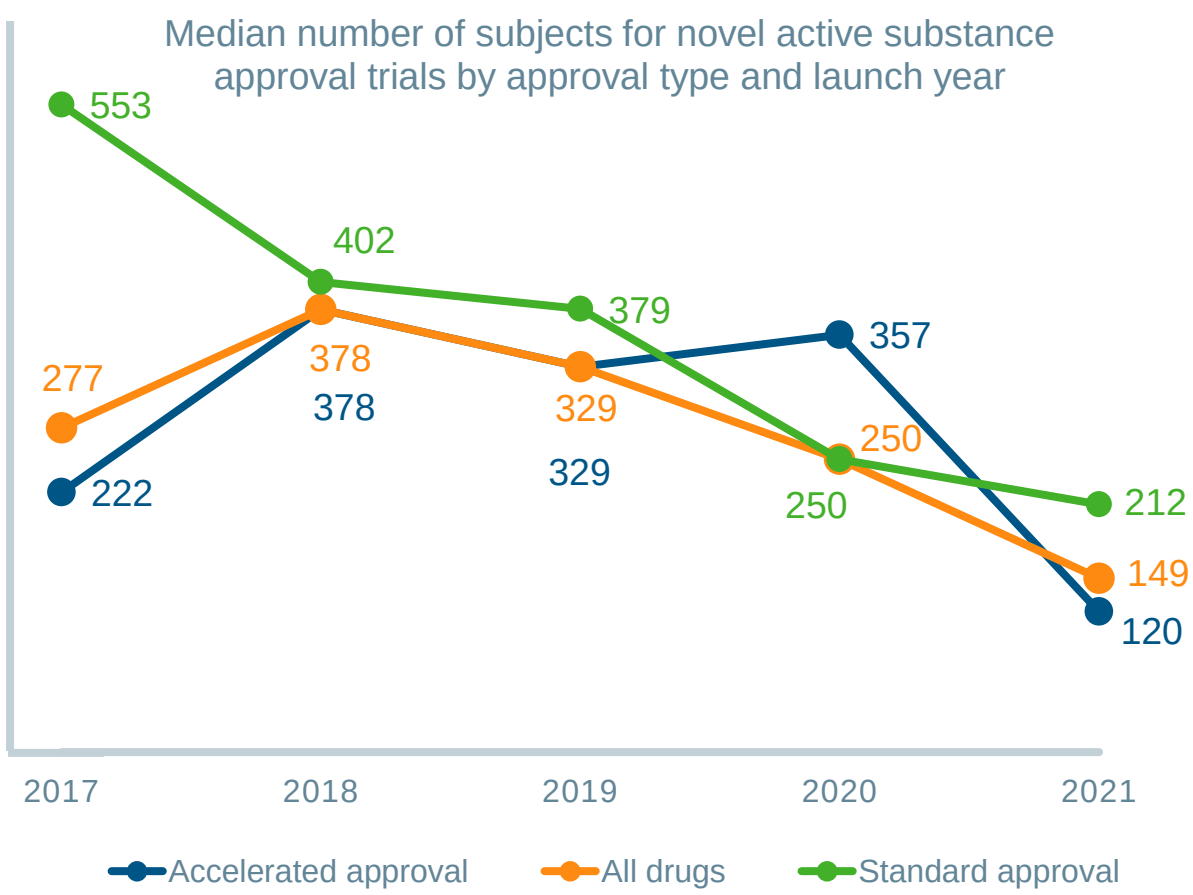



Source: Citeline Trialtrove, IQVIA Institute, Jan 2022.
Global Oncology Trends 2022: Outlook to 2026. Report by the IQVIA Institute for Human Data Science

# Number of subjects in oncology clinical trials is growing while accelerated approvals tend to be based on fewer subjects

*Oncology clinical trial subjects and number of subjects in novel active substance (NAS) approval trials by approval type*




Source: Citeline Trialtrove, IQVIA Institute, Apr 2022
Global Oncology Trends 2022: Outlook to 2026. Report by the IQVIA Institute for Human Data Science
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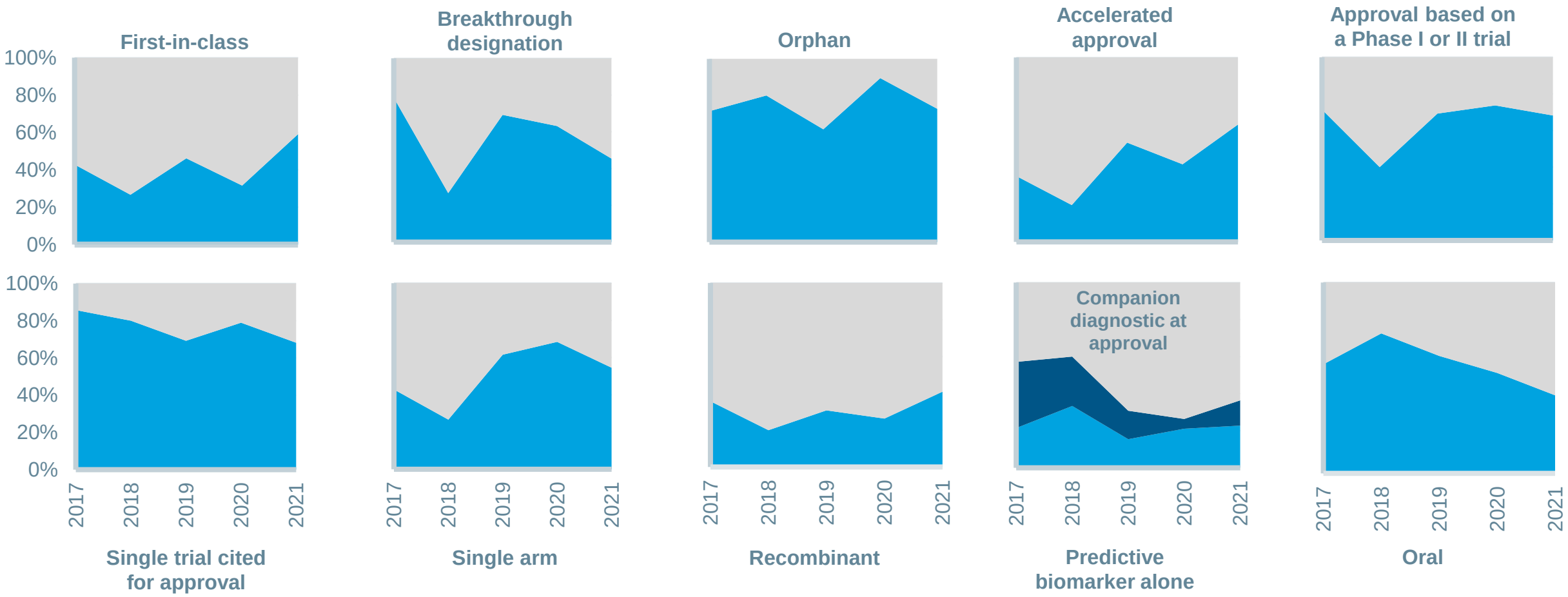
# Oncology drugs increasingly receiving accelerated approvals, orphan designations and are approved based on early trials

*U.S. oncology NAS launches by characteristics of approval, 2017-2021*




Source: IQVIA Institute, Apr 2022.
Global Oncology Trends 2022: Outlook to 2026. Report by the IQVIA Institute for Human Data Science

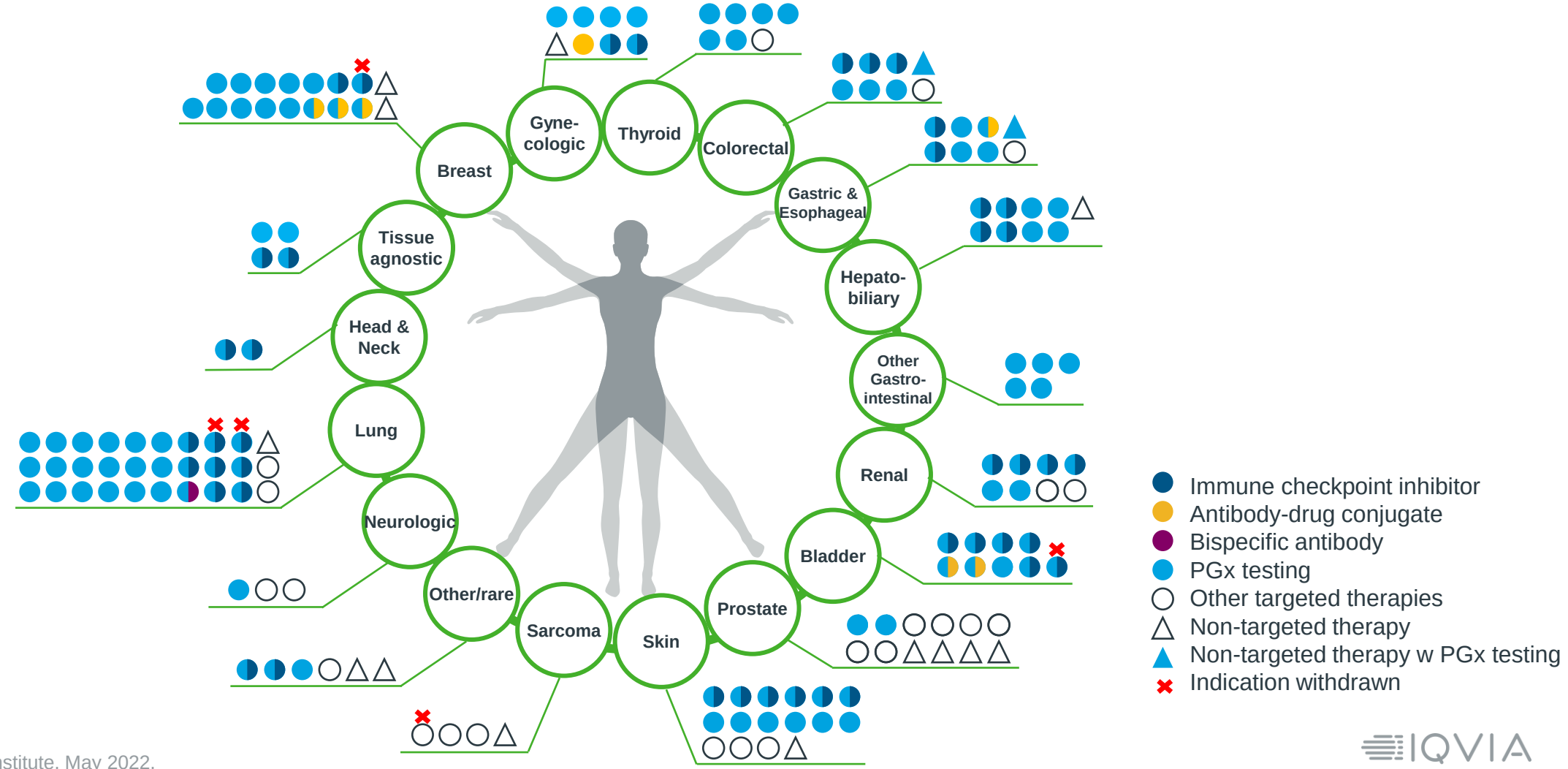
# Discussion: Precision oncology-based clinical trials

# Discussion: Clinical trial endpoints in oncology

# Cancer Patient Access to and Use of Scientific Advances

# Since 2011, 96 NASs were launched in the U.S. to treat solid tumors, with some approved for multiple indications

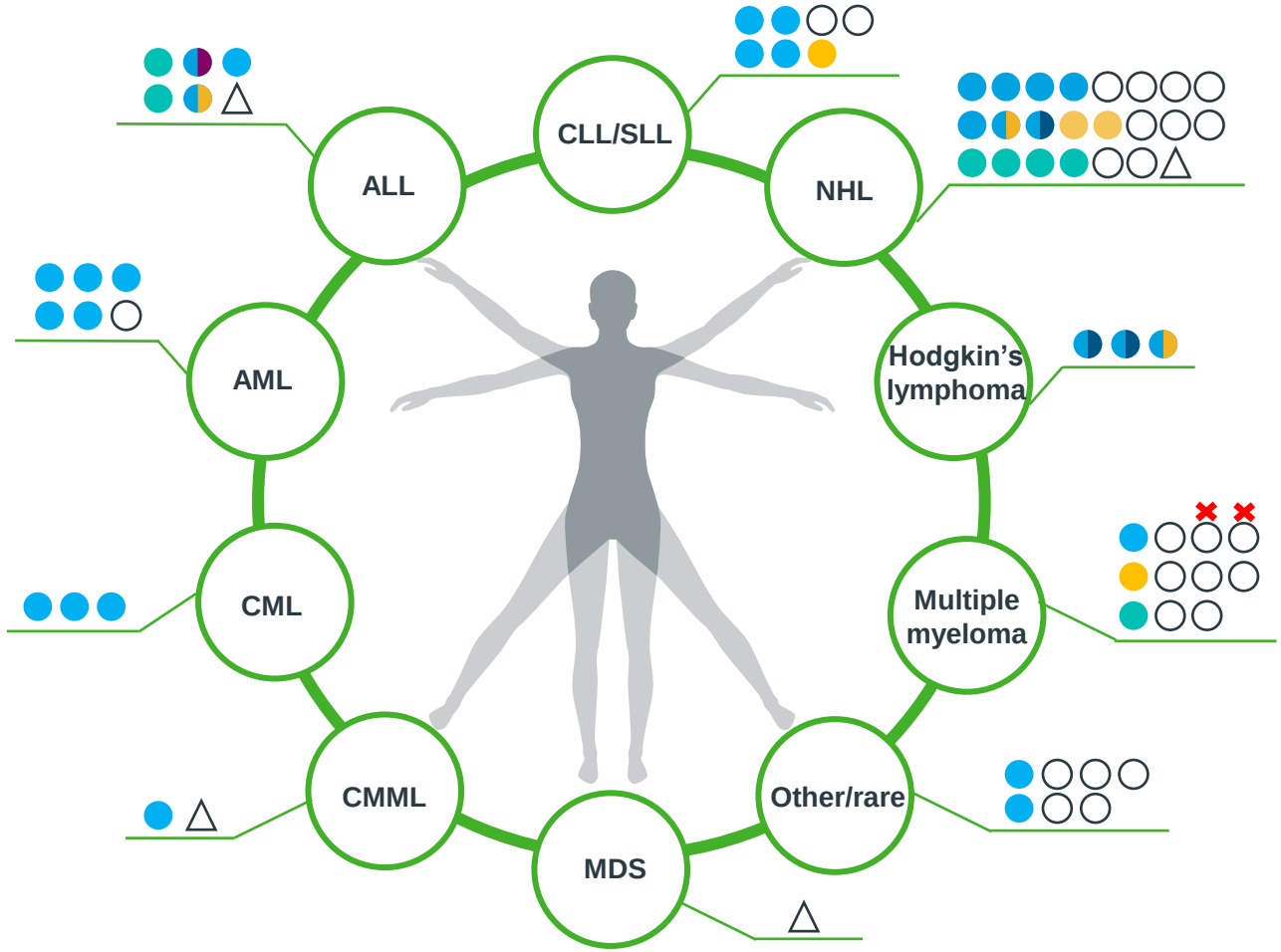
*U.S. NASs in solid tumors launched 2011-2021 with indications including those granted after initial launch*




Source: IQVIA Institute, May 2022.
Global Oncology Trends 2022: Outlook to 2026. Report by the IQVIA Institute for Human Data Science

# In the U.S., 55 unique new hematological cancer medicines have been launched since 2011

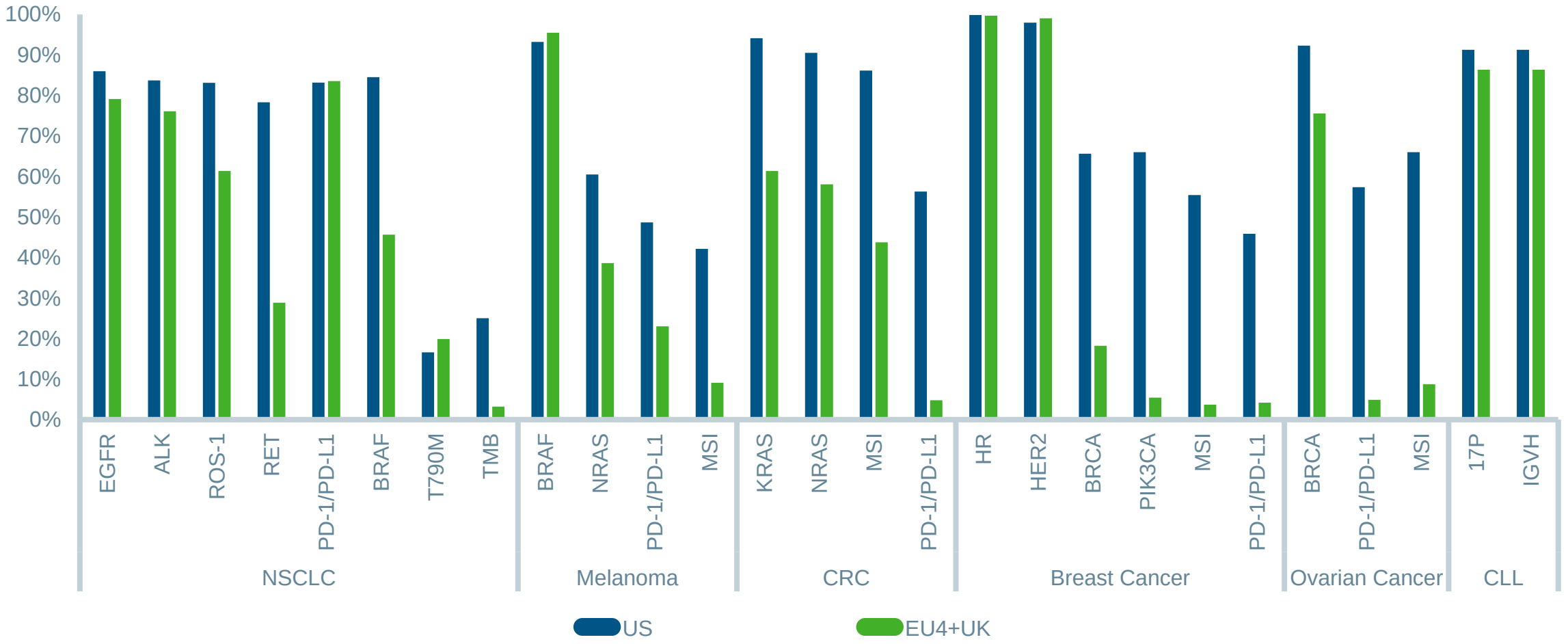
*U.S. NASs in hematology-oncology launched 2011-2021 with indications including those granted after initial launch*




Source: IQVIA Institute, May 2022.
Global Oncology Trends 2022: Outlook to 2026. Report by the IQVIA Institute for Human Data Science

# Country-specific differences exist in molecular testing across different tumor types and biomarkers

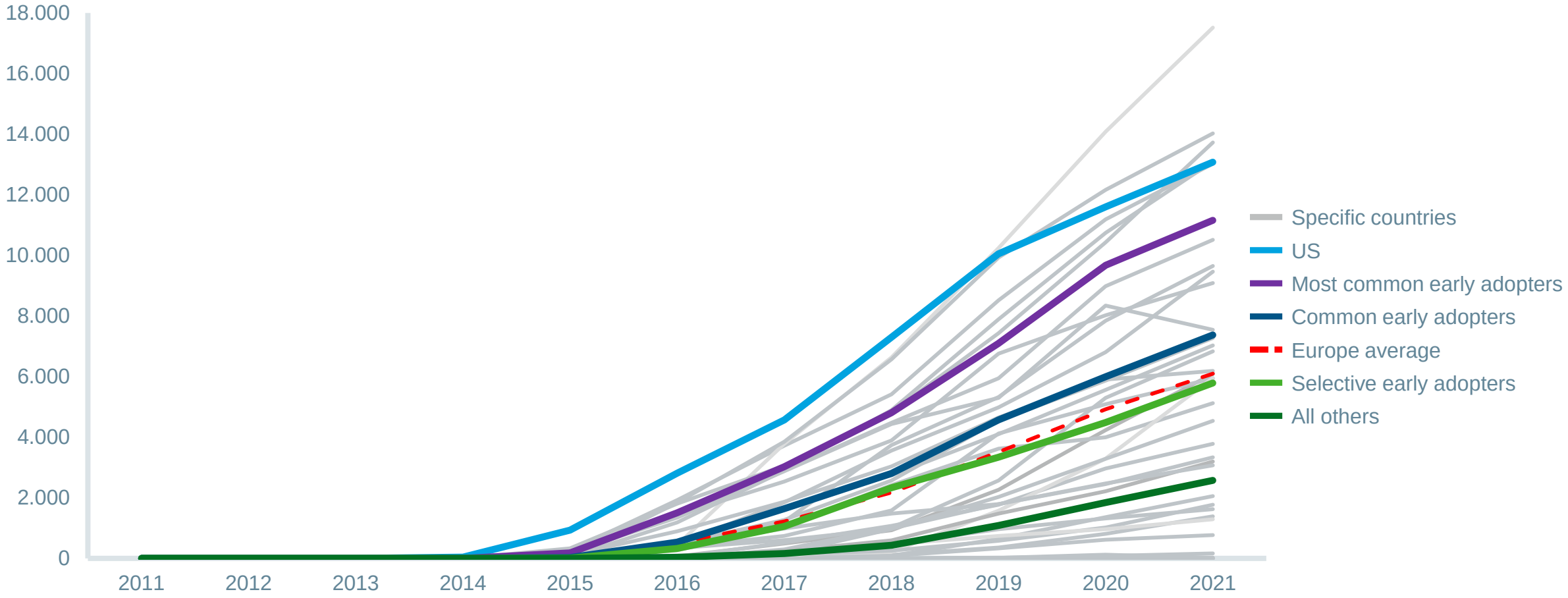
*2021 Testing rates by tumor, biomarker and geography*




Source: IQVIA Oncology Dynamics, Dec 2021.
Global Oncology Trends 2022: Outlook to 2026. Report by the IQVIA Institute for Human Data Science

# PD-1/PD-L1 inhibitors

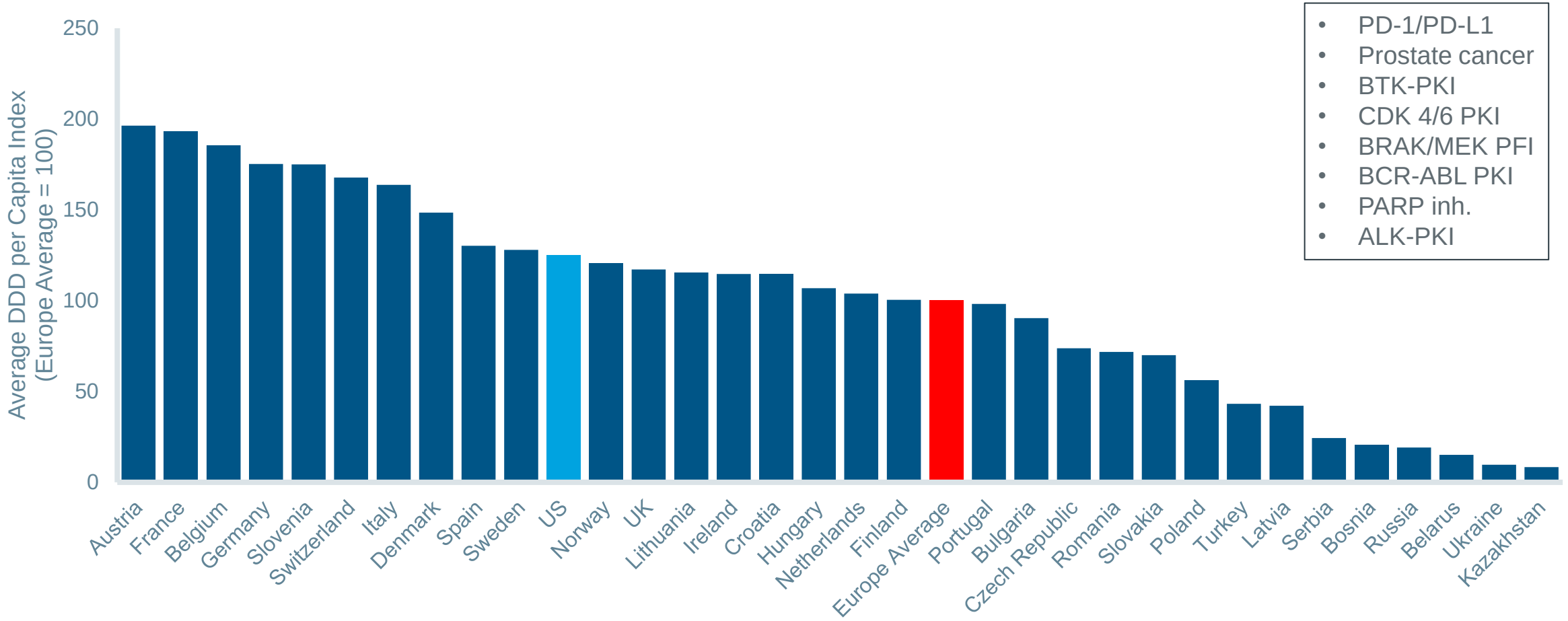
*PD-1/PD-L1 inhibitors defined daily doses per 100k population, 2011-2021*




Source: IQVIA MIDAS, Dec 2021; IQVIA Institute, Aug 2022

# Across oncology essential innovative medicine groups there are significant differences in per capita use

Average utilization of Oncology Essential Innovative Medicines, Europe average = 100




Note: European average excludes null values for non-covered non-retail in select classes

Source: IQVIA MIDAS, Dec 2021; IQVIA Institute, Aug 2022

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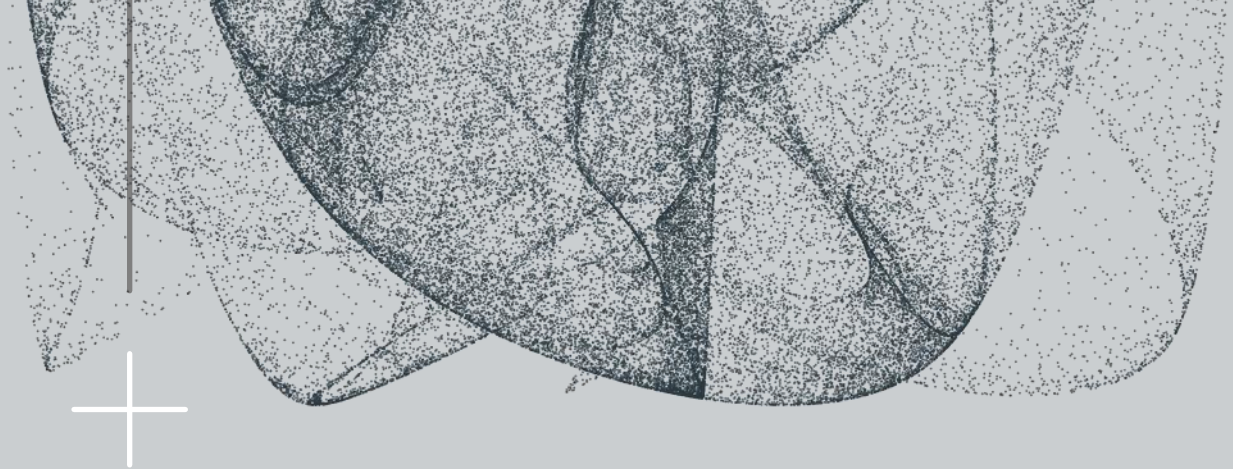
# Discussion: Implementing precision medicine in national health systems – bringing new developments to practice and to patients



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# Closing comments

# Download Institute oncology-related reports and exhibits

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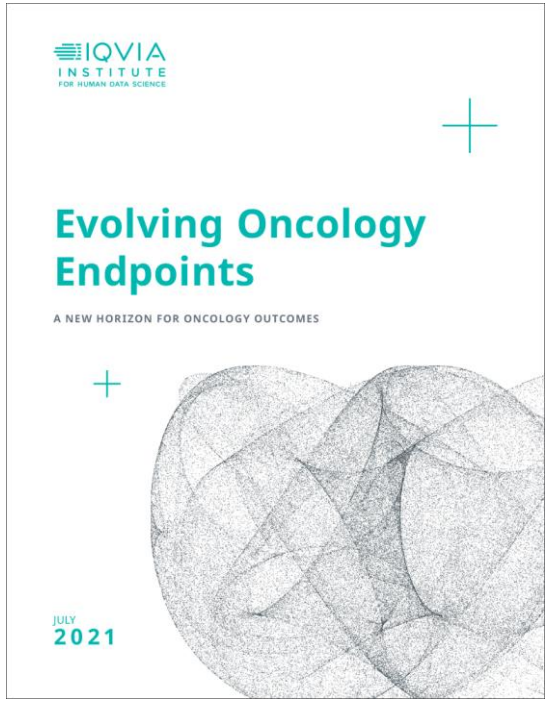


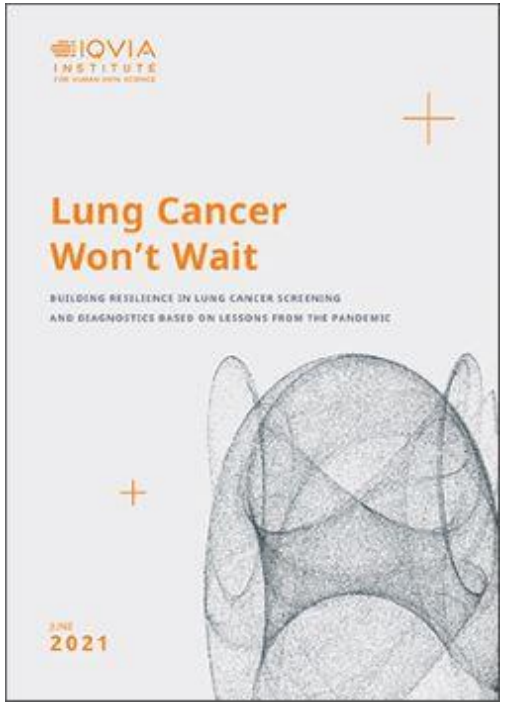


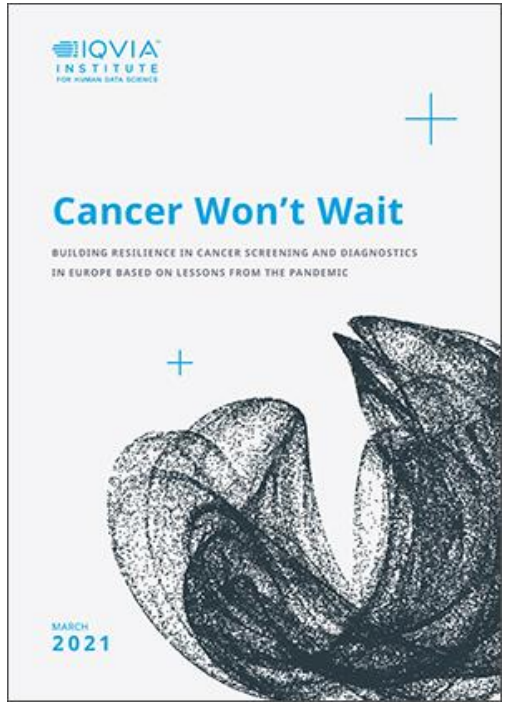


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