

## At a glance

*Therapeutic Experience and Forecasting  
Expertise That Overcome Challenges*

Our cancer patient flow forecast approach takes into account:

- Future patient segments that consider the flow of patient populations
- Partitioning of patients into commercially relevant segments
  - Lines of therapy
  - Patient eligibility based upon prior therapies
  - Biomarkers and targeted therapies
  - Varying competitive sets by patient segment
- Underlying assumptions for treatment allocation and rates of progression through the various therapies or variable dosing per cycle

## Why Kantar Health?

Kantar Health is a global, evidence-based decision support partner to the world's leading pharmaceutical, biotech, device and diagnostic companies. Our 700+ staff in over 40 countries act as catalysts, bringing together clinical, medical and methodological expertise, commercial/marketing know-how and proprietary data. It is this rare combination, together with our unparalleled stakeholder reach, that enables us to mobilize incisive, imaginative and timely ROI-driven solutions, empowering clients to deliver better healthcare options to their customers.

# Oncology Forecasting

Forecasting the commercial potential in oncology markets involves some unique challenges.

Determining the correct number of patients requires reliable data sources, quantitative methods, and in-depth knowledge of definitions and treatment paradigms. Addressing the cascade of patients through lines of therapies is complex. New therapies addressing various biomarkers and patient segments means that forecasting a single tumor type may lead to creating many different forecasts.

## Challenges and Caveats in Oncology Forecasting

Factors that must be considered include:

- Determining relevant patient populations
  - Data sources
  - Definitional issues
  - Methods related to quantifying disease recurrence and progression
  - Unique target patient populations for different treatments
- Accounting for recurrence and disease progression
- In metastatic disease, lines of therapy (e.g., first-, second-, and third-line)
- Significance of combination therapy, extended usage, and biomarkers
- Duration of therapy
- Complexity in dosing regimens (i.e., multiple cycles or variable dosing per cycle)

## Contact Us:

Please email [info@kantarhealth.com](mailto:info@kantarhealth.com) for more information.

## Kantar Health Approach to Oncology Forecasting

1. Define the indication / target population to forecast
2. Segment the target population(s) if necessary – segmentation examples
  - Biomarker (e.g., EGFR mutations in non-small cell lung cancer)
  - Prior treatment (e.g., second-line platinum-resistant ovarian cancer)
3. Quantify and project target population epidemiologies over the forecast period
4. Determine current therapies for each target patient segment
5. Obtain data for historical market shares for current therapies
6. Construct market model reconciling epidemiology and current treatments for each target patient segment
7. Identify future competitors with potential to enter the market in each target patient segment
8. Construct scenario(s) around likely groups of future competitors and their product attributes
9. Estimate launch timing and share impacts for each competitor in each scenario
  - Market research
  - Analogues
10. Apply length of therapy, dosing, and pricing assumptions
11. Summarize forecast(s) in terms of treated patients, units, and sales



Kantar Health consultants have a deep understanding of oncology and are supported by a comprehensive suite of proprietary oncology databases, tools, and multiclient offers.

<p><b>Forecast Architect®</b></p>	<p>Forecast Architect® allows clients to apply insight and assumptions to model any number of possible scenarios for products. Using non-linear techniques proprietary to Kantar Health, Forecast Architect® reconciles epidemiologic and historical data to derive treatment rates, patient and product market shares, days of therapy, units, prescriptions, and sales revenues. Alternative forecasts can be generated by changing the model's basic assumptions, adding patient data, updating epidemiologic estimates, factoring in co-morbid conditions and concurrent therapies, and adding or deleting market-shaping events such as regulatory changes and new product launches.</p>
<p><b>CancerMPact®</b></p>	<p>CancerMPact® is an invaluable oncology decision support tool for market analysis, strategic planning, and identification of commercial opportunities in the U.S., Western Europe, Japan, and China. This tool is composed of web-based integrated modules: Treatment Practices and Evolution (Treatment Architecture, Treatment Evolution, and Emerging Technologies), Patient Metrics, and Monthly Drugs and Regimens.</p>
<p><b>CancerNFluence®</b></p>	<p>CancerNFluence® identifies and profiles physicians in the U.S. and Western Europe who influence treatment decisions within and across high-profile cancers affecting large populations. CancerNFluence® goes beyond national-level thought leaders to identify physicians wielding significant influence at the regional level, potentially improving the impact of speaker programs/ad board recruitment, medical science liaison group alignment, sales force targeting, clinical investigator recruitment, new product planning, and marketing research recruitment.</p>
<p><b>Oncology Market Access U.S.</b></p>	<p>Oncology Market Access U.S. is a web-resident source of information and insight and access to experts. It provides cutting-edge information and analysis on critical reimbursement, coverage, and competitive issues in the U.S. oncology landscape. This subscription helps pharmaceutical marketing and sales professionals more successfully position cancer drugs in an increasingly scrutinized and regulated oncology marketplace. The analyses are based on industry experience augmented by in-depth research with key stakeholders, including oncologists, payers, practice managers, patients and subject matter experts.</p>
<p><b>Oncology Market Access Europe</b></p>	<p>Oncology Market Access Europe is a web-resident source of information and insight and access to experts. It provides cutting-edge information and analysis on critical reimbursement, coverage, and competitive issues in the EU oncology landscape. This subscription helps pharmaceutical marketing and sales professionals more successfully position cancer drugs in an increasingly scrutinized and regulated oncology marketplace. The analyses are based on industry experience augmented by in-depth research with key stakeholders, including oncologists, payers and subject matter experts.</p>