

# KANTAR HEALTH AND LIGHTSPEED ALL GLOBAL ONCOLOGY STUDY

Kantar Health & Lightspeed All Global surveyed 66 oncologists in the U.S. balanced by practice type.

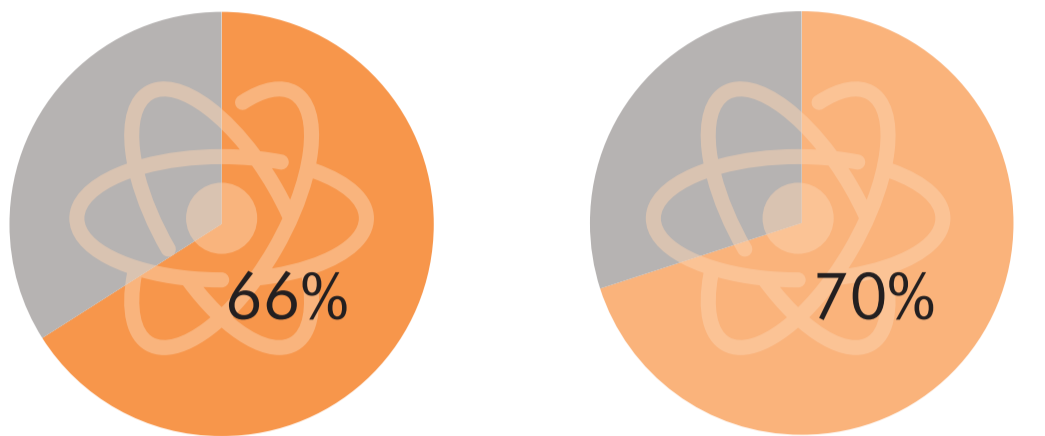
## THE FUTURE TREND OF PD-1 DRUGS



Believe the purchase and administration of PD-1 drugs will improve their practice's economics

## THE FUTURE TREND OF BIOSIMILAR INTERCHANGEABILITY

The majority of oncologists believe biosimilars will be interchangeable with the brand and each other



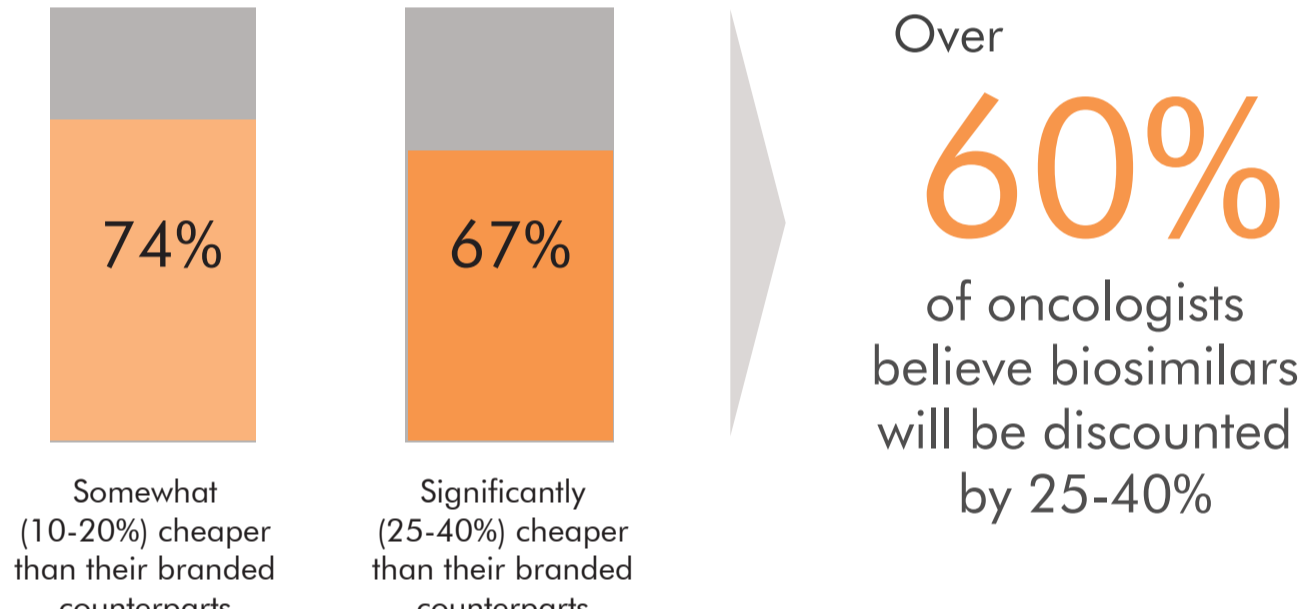
Believe FDA-approved biosimilars will be interchangeable with their branded counterparts

Believe multiple FDA-approved biosimilars of the same originator will be interchangeable with each other

Almost **70%** of oncologists believe that payers will mandate the use of both biosimilar supportive care and anticancer therapeutic agents instead of branded counterparts

Virtually **ALL** oncologists expect payers to require use of therapeutic generics, and most that patients will benefit through increased access

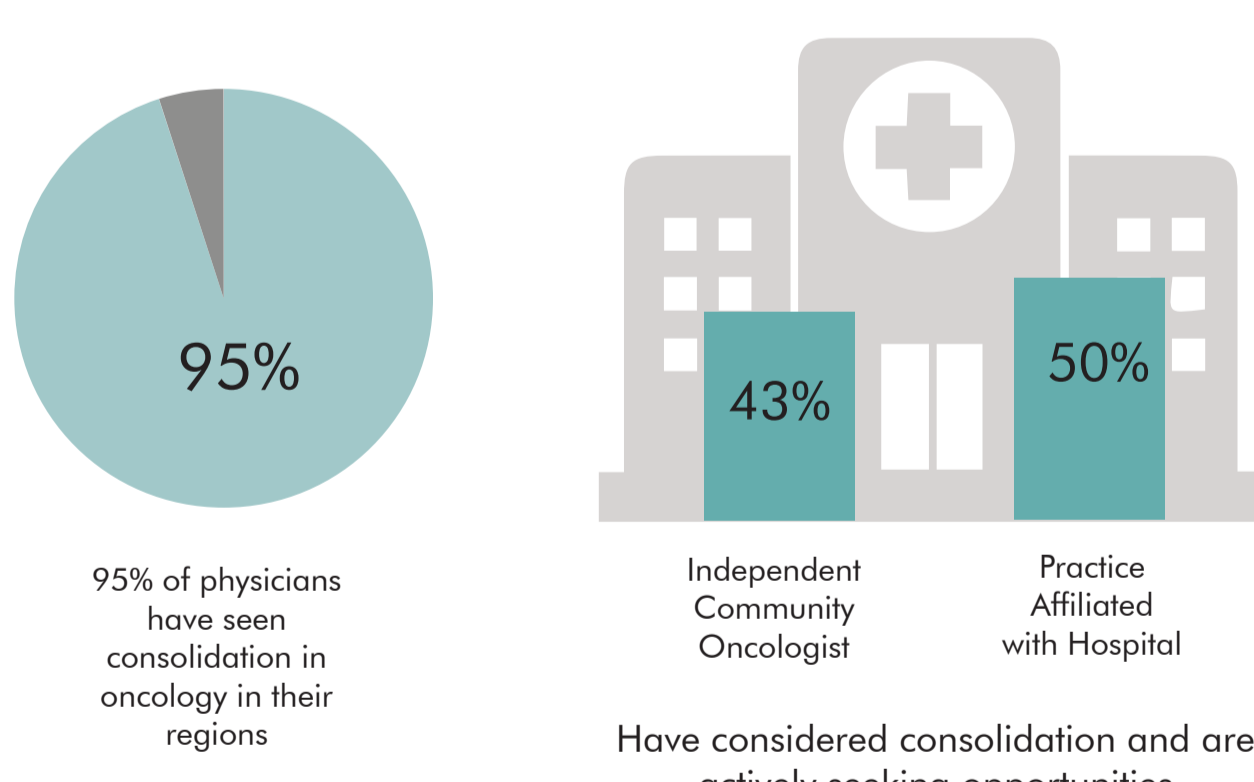
## THE FUTURE OF BIOSIMILAR DISCOUNTS



Oncologists are **equally divided** on the acceptability of biosimilars 5 years in the future, with about 1/2 believing they will be good options for new patients and good enough for switched patients

**75%** of the surveyed oncologists agree that their patients have limited resources and will not be able to afford novel immunotherapy

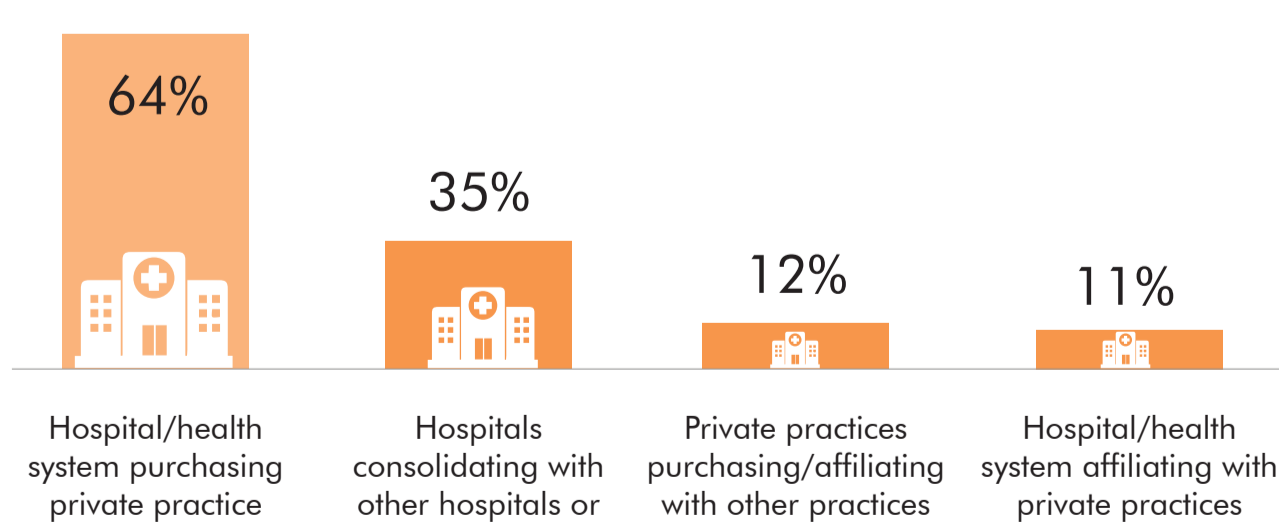
## A LARGE PORTION OF COMMUNITY PRACTICES ARE ACTIVELY SEEKING OPPORTUNITIES TO CONSOLIDATE



95% of physicians have seen consolidation in oncology in their regions

Have considered consolidation and are actively seeking opportunities

## THE MOST COMMON TYPE OF CONSOLIDATIONS SEEN ARE HOSPITALS ACQUIRING PRIVATE PRACTICES



## DRIVERS OF HEALTH SYSTEM/PRACTICE INTEGRATION

Hospitals purchasing private practices	Private practices purchasing/affiliating with each other	Hospitals affiliating with private practices
Better margins available through hospital outpatient	Increasing administrative burden in solo practice	Profitability of oncology as a service line
Increasing administrative burden in solo practice	Providing community with integrated care delivery model	Increasing administrative burden in solo practice
Opportunity to expand patient pool		Opportunity to expand patient pool