

Novartis Oncology



The Precision Oncology Annual Trend Report

Perspectives From Oncologists, Pathologists, and Payers
Eighth Edition

Infographic

Market research results commissioned by Novartis that shed light on the evolution, dynamics, and trends impacting precision oncology



2021

Precision Oncology Annual Trend Report

Methodology and respondents*: 60 payers, 50 oncologists, and 30 pathologists were surveyed to track the **evolution of precision oncology in routine clinical practice**

 State legislative initiatives (CA, IL, LA) are mandating coverage of oncology biomarker testing³⁻⁵

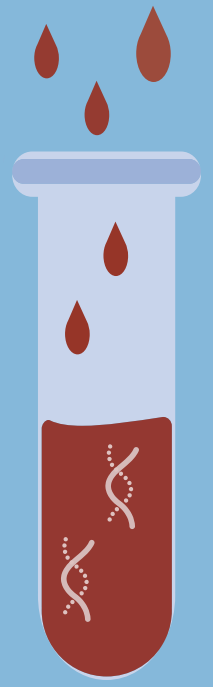
Reimbursement remains **unsatisfactory for NGS testing**, according to **~33%** of oncologists and pathologists



63% of oncologists report the most important sources of information influencing targeted therapy utilization are:

- **Molecular pathology report** (increased 75% since 2020)
- **Peer-reviewed journals**

83% of oncologists use **liquid biopsies** in NSCLC

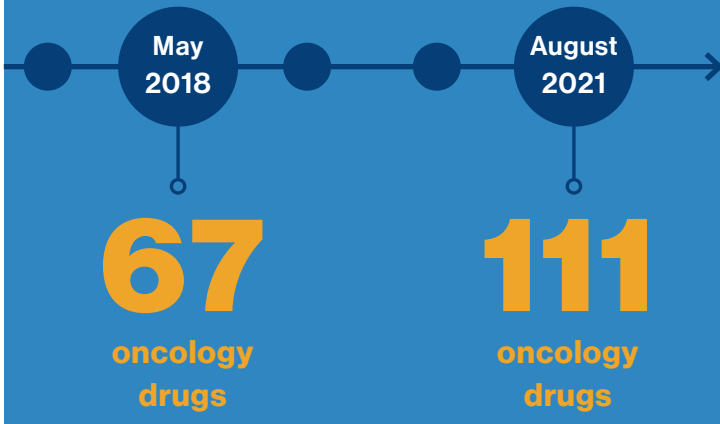


Key Findings

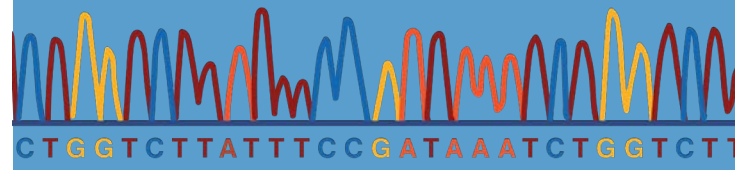
- **Increasing** NGS and liquid biopsy **utilization**
- **Increasing** biomarker test and treatment **complexity**
- **Unsatisfactory** biomarker test **reimbursement**


Most important influencer when choosing an oncology biomarker test? **The predictive power to identify treatment options, according to 59% of oncologists**

Oncology drugs that specify at least **1 biomarker in their FDA label**^{1,2}

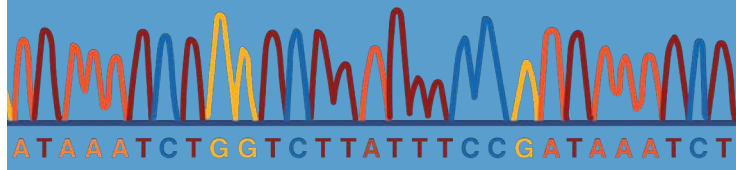


Utilization of NGS has become widespread: **87%** of oncologists report they utilize the **FoundationOne® CDx**; however, payer coverage lags for the test at **68%**



 **Biomarker testing during COVID-19 decreased**, then subsequently returned to normal levels

A comprehensive **NGS panel** is preferred over a short panel or single biomarker tests for the majority of common tumor types



Oncologists report that **patients continue to ask for biomarker testing**

FDA, US Food and Drug Administration; NGS, next-generation sequencing; NSCLC, non-small cell lung cancer.

*The key findings from the 2021 Precision Oncology Annual Trend Report are reflective of the survey respondents and may not reflect actual state of the marketplace.

The Precision Oncology Annual Trend Report continues to bring to light developing trends and how they impact the important decisions being made to adopt and utilize precision oncology.

For a copy of *The Precision Oncology Annual Trend Report*,
contact your Novartis representative
or visit hcp.novartis.com/care-management.



References:

1. Center for Drug Evaluation and Research. Table of pharmacogenomic biomarkers in drug labeling. US Food and Drug Administration. Updated August 20, 2021. Accessed October 5, 2021. <https://www.fda.gov/drugs/science-research-drugs/table-pharmacogenomic-biomarkers-drug-labeling>
2. Center for Drug Evaluation and Research. Table of pharmacogenomic biomarkers in drug labeling. US Food and Drug Administration. Accessed May 11, 2018. <https://www.fda.gov/drugs/science-research-drugs/table-pharmacogenomic-biomarkers-drug-labeling>
3. The Illinois Insurance Code. Section 356z.43; 2021. Accessed November 4, 2021. <https://www.ilga.gov/legislation/publicacts/102/PDF/102-0203.pdf>
4. The State of Louisiana. SB 84 Act 43 Section 1. R.S. 22:1028.3; 2021. Accessed November 4, 2021. <https://www.legis.la.gov/Legis/ViewDocument.aspx?d=1230690>
5. The State of California. SB-535 Section 10123.20. Accessed November 4, 2021. https://leginfo.legislature.ca.gov/faces/billTextClient.xhtml?bill_id=20210220SB535

