

Country report: Belgium

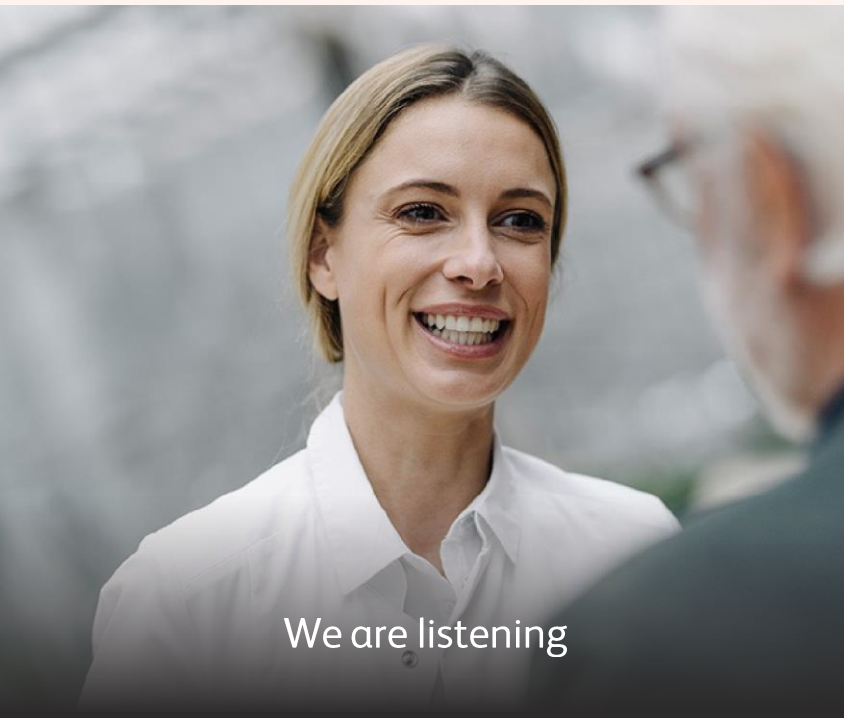
Because there is more to do



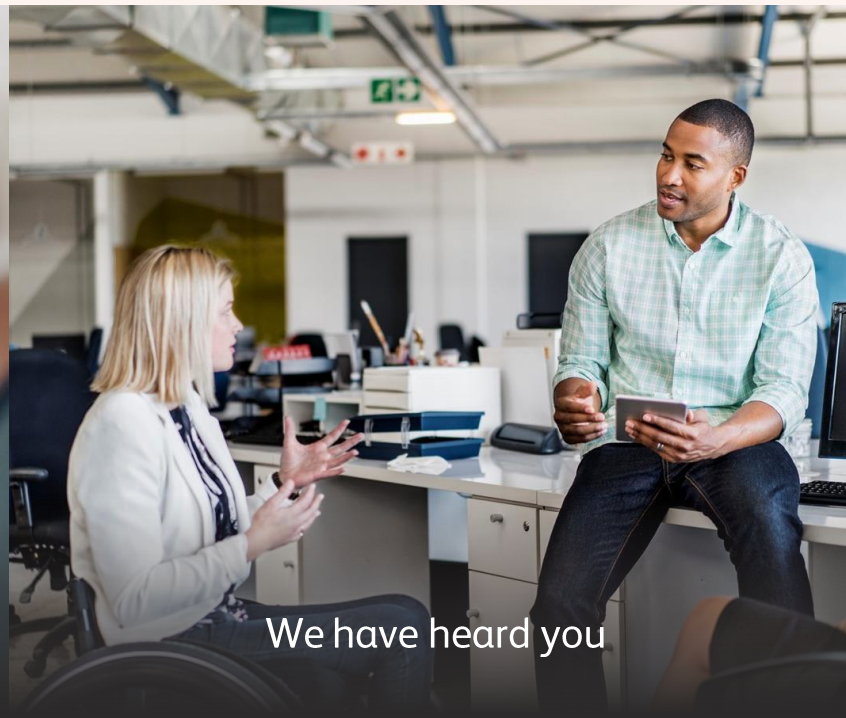
Opening the conversation:

How can pharma companies better respond to the health and wellbeing needs of patients?

We conducted surveys with patients, carers, patient advocates and healthcare professionals in Belgium, to better understand what more we can do. This report is a synthesis of those findings.



We are listening



We have heard you



Let's act together!

What more can we do, to help support Belgian patients along their treatment journeys?

Findings of the deep-dive survey of patients and healthcare professionals in Belgium

Bristol Myers Squibb's mission is to discover, develop and deliver innovative medicines that help patients prevail over serious disease. But we firmly believe that there is more we can do – **beyond delivering innovative medicines** – to help support patients and their loved ones. It is this belief that led to the creation of the initiative *'Because there is more to do'*.

It all starts with listening

Along this journey to discover peoples' needs and what could be our wider role in society, we opened up to peoples' views through a series of surveys.

We wanted to learn

- What are the **healthcare challenges and unmet needs** of people and their loved ones?
- What can be done to **improve peoples' lives** and make a bigger contribution?
- How can pharma companies **better help to support them**?
- **What is peoples' opinion** of pharma companies and their role in society?

What you told us

- This report presents the findings of the Belgium patient & professional survey.*
- A public EU-wide survey** was also done, open to people across eight countries.

Read the [public survey report](#) here.

What's next?

Thank you for taking the time to share your thoughts and ideas and for your transparency and honesty. Your insights will inspire new approaches. This survey is the starting point for a deeper engagement with patient groups and the healthcare community in Belgium. We will now explore with partners, ideas for new initiatives and activities that respond to the needs that people have voiced.



The 'Because There is More To Do' survey:

* The patient & professional survey of stakeholders in Belgium was based on two anonymous online surveys: one with feedback from 120 primary care physicians, cardiologists and oncologists; another with responses from 30 oncology or atrial fibrillation patients, and caregivers of patients with these conditions. In addition, exploratory qualitative research was done with patient advocacy groups, to gain greater insights.

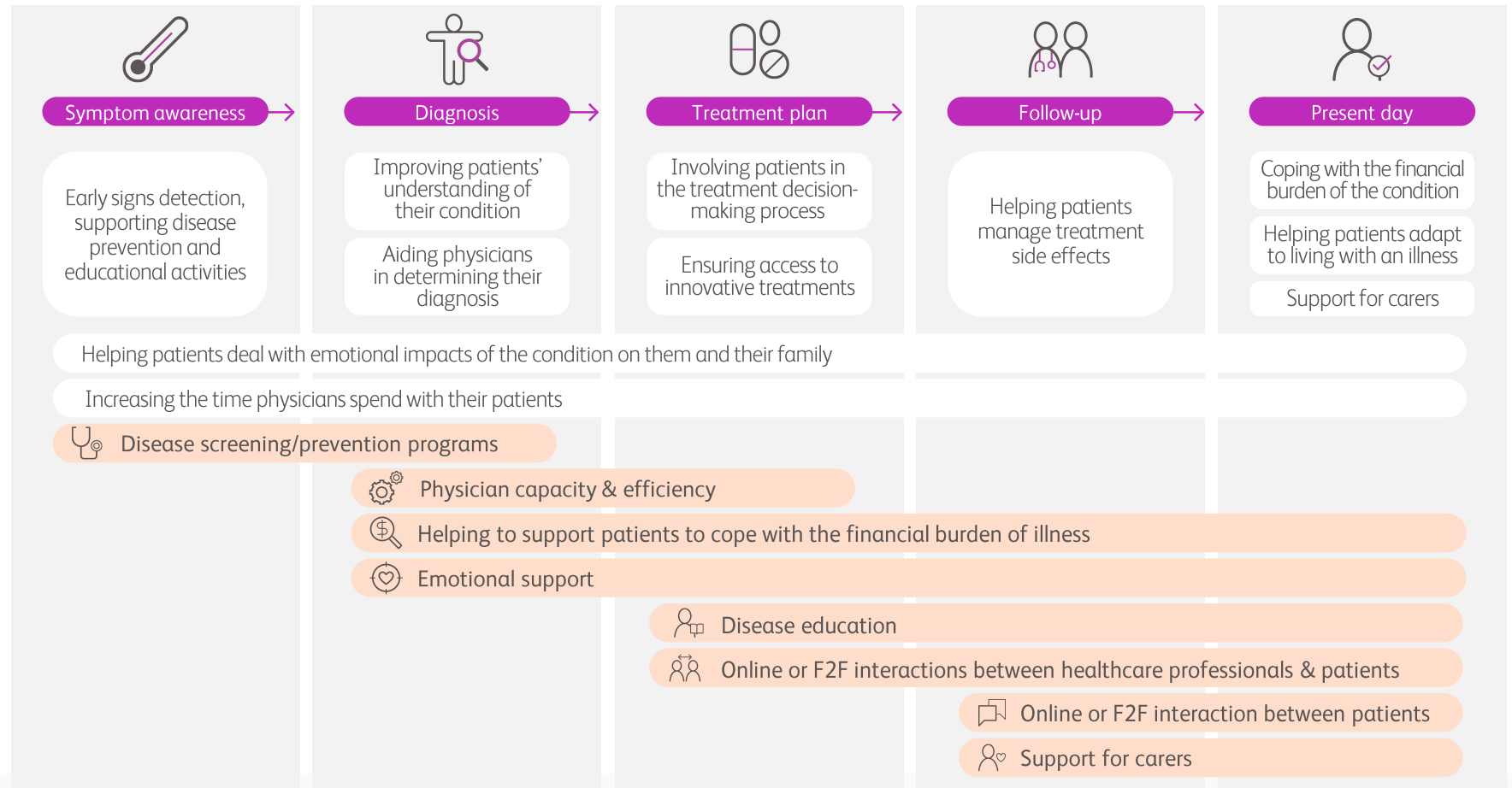
For full details on this survey please see [the Annex](#).

** Respondents contributed to the public survey from Austria, Belgium, Denmark, Finland, the Netherlands, Norway, Switzerland and Sweden.

Synthesis report Deep-dive: professional and patient survey

What are the
current unmet needs?

How can pharma partner to
help support patients and
meet these challenges?



Synthesis report Public survey



What you told us

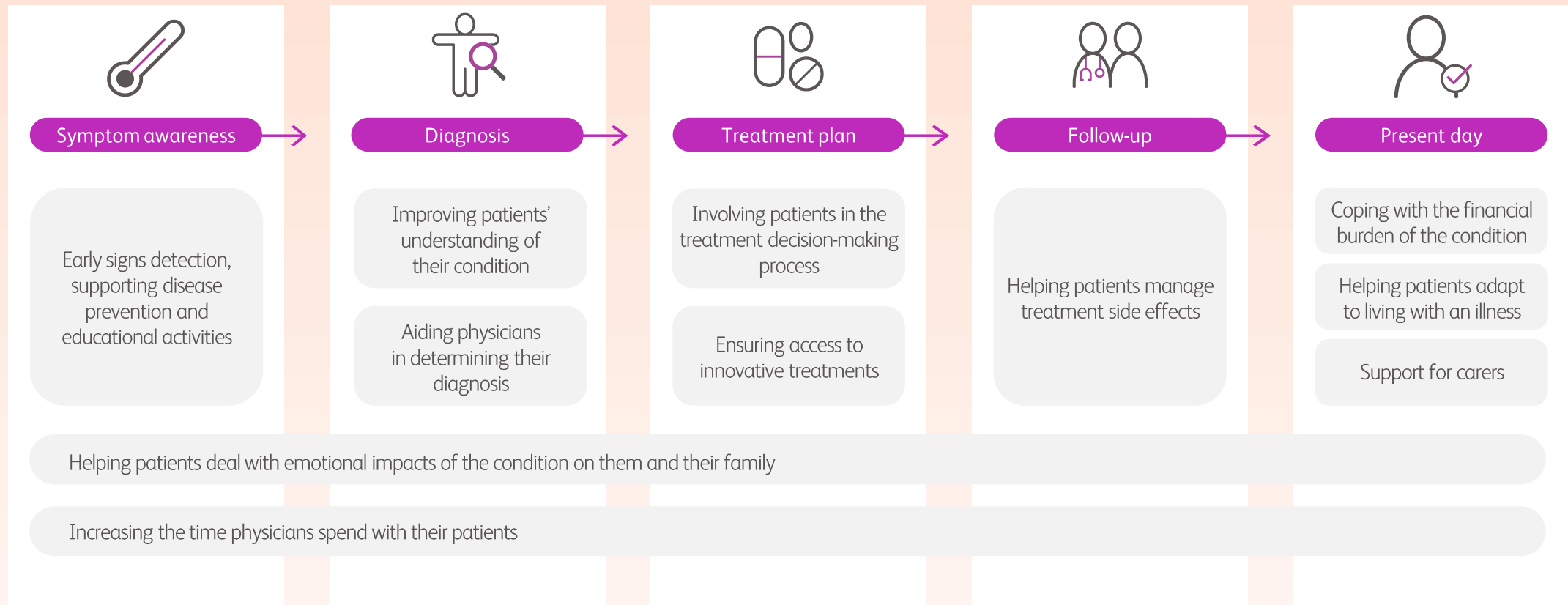
Read the full [public survey report](#) (consolidated results of 8 European markets).

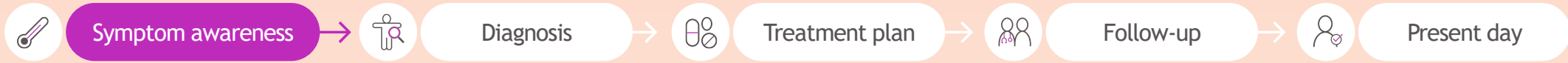


Unmet needs

Identifying key needs along the patient journey

Across the patient journey there are a broad range of needs, dependent on individuals' exact circumstances and conditions. However patients, patient association groups and physicians in Belgium identify the following areas as key needs across the patient journey.





Unmet needs

Some healthcare professionals would like to see pharma invest in education initiatives for disease prevention



Among those healthcare professionals who took part in the survey who believe pharma should invest in local activities*

19%

would most like to see pharma invest in **‘supporting education initiatives for disease prevention’**.

(from a list of 10)

* Of those who said they agree that pharmaceutical companies should support activities in partnership with patient groups, support activities in partnership with other pharmaceutical companies or support patients beyond medicinal treatment (on a five-point scale, from a list of 11 items, n=119).



PAGs



Insights from patient groups

Some patient groups that took part in our research need help raising knowledge on diseases as a whole and knowledge of available/new treatments for patients specifically. The way in which the groups we spoke to as part of our research aim to increase knowledge can vary dependent on the patient groups they cater to. For example, some groups focus on raising awareness of a certain cancer types, and they lobby around that.

Qualitative research

B4. You indicated that pharma companies should invest in meaningful local activities, please select which of the following, you would like to see investment into the most. Base: n=119. Those HCPs who selected that pharma companies should support activities with patient groups/other pharma companies/support beyond medicinal treatment



Unmet needs

Making a diagnosis was among the most common Top-5 challenges for physicians



HCPs

55%

of physicians who took part in the survey selected **'determining the diagnosis'** among their Top-5 most challenging stages for managing patients.
(from a list of 28)



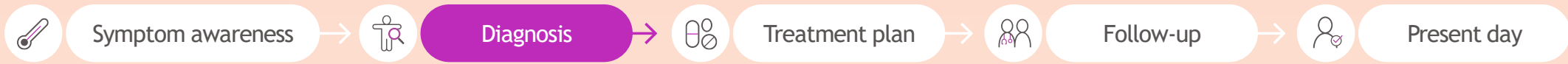
PAGs



Insights from patient groups

Some patient groups also identify from their experiences that achieving a correct and timely diagnosis can be difficult. Some report patients having a lengthy diagnosis journey which could then worsen their prognosis. Lobbying for education and testing protocols is where pharma could help.

Qualitative research



Unmet needs

Both healthcare professionals & patients acknowledge disease education can be challenging



HCPs

23%

of physicians who took part in the survey would like to be able to support their patients more, beyond the provision of medicines or surgery, with **‘educating the patient about their condition’**.

(from a list of 28)



Patients
Caregivers

23%

of patients and caregivers who took part in the survey selected **‘understanding the condition’** among the five most challenging stages of their condition.

(from a list of 23)



Insights from patient groups



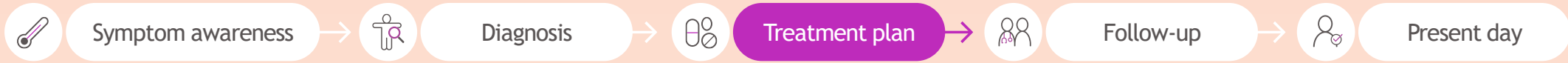
PAGs

Most patient groups that took part in our research acknowledge the difficulties that patients have coming to understand their disease, hence **their aim is to raise knowledge, awareness and educate patients in various ways.**

“When you were in that period and are in that phase of the diagnosis of course a lot overwhelms you. And a lot of info comes in, but also a lot is lost.”

Qualitative research

A4. At which of the following stages, if any, would you like to be able to provide more support to your patients beyond the provision of medicines and surgery, but are unable to do so currently? [select up to five from a list of 28] Base: n=120 (All physicians) A2. Thinking of your experience with [CANCER/ATRIAL FIBRILLATION] which of the following stages, if any would you say was the most challenging for [PN: PATIENT INSERT you] [PN: CARER INSERT the person you care for]? Base=30 (All patients/caregivers)



Unmet needs

Physicians find discussing treatment options a challenge; patients & caregivers value more support



HCPs

21%

of physicians who took part in the survey selected **'discussing treatment options with the patient'** among their Top-5 most challenging stages for managing patients.
(from a list of 28)



Patients Caregivers

27%

of patients and caregivers who took part in the survey identified **'being consulted or empowered in treatment decisions'** as a Top-5 area where they would have valued more support.
(from a list of 23)



PAGs



Insights from patient groups

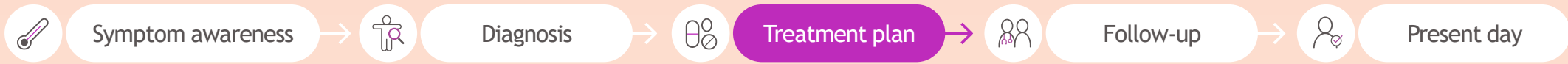
Some patient groups that took part in our research often have patients and their loved ones asking **questions about current and future 'treatment options' that sometimes they feel unequipped to answer.**

"Medication doesn't work the same way for everybody, people always have to be very careful with them."

Qualitative research

A1. Thinking about your experience of treating and managing your patients, which of the following stages would you say present the most challenges to you as a physician? [select up to five from a list of 28] Base: n=120 (All physicians)

A5. At which of the following stages, if any, do you think [PN: PATIENT INSERT you] [PN: CARER INSERT the person you care for] would have appreciated more support? [select up to five from a list of 23] Base=30 (All patients/caregivers)



Unmet needs

Physicians would like to support patients more to access innovative treatments; patients say accessing these treatments is a Top-5 challenge



HCPs

24%

of physicians who took part in the survey would like to be able to support their patients more with **'access to innovative treatments'**.
(from a list of 28)



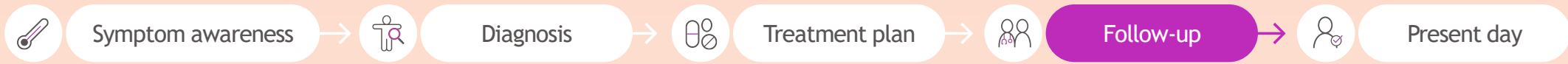
Patients
Caregivers

27%

of patients and caregivers who took part in the survey identified **'access to innovative treatments'** as one of the Top-5 areas where they would have valued more support.
(from a list of 23)



A4. At which of the following stages, if any, would you like to be able to provide more support to your patients beyond the provision of medicines and surgery, but are unable to do so currently? [select up to five from a list of 28]
Base: n=120 (All physicians) A5. At which of the following stages, if any, do you think [PN: PATIENT INSERT you] [PN: CARER INSERT the person you care for] would have appreciated more support? [select up to five from a list of 23]
Base=30 (All patients/caregivers)



Unmet needs

All stakeholders identify treatment side effects as an area where patients & physicians need support



HCPs

21%

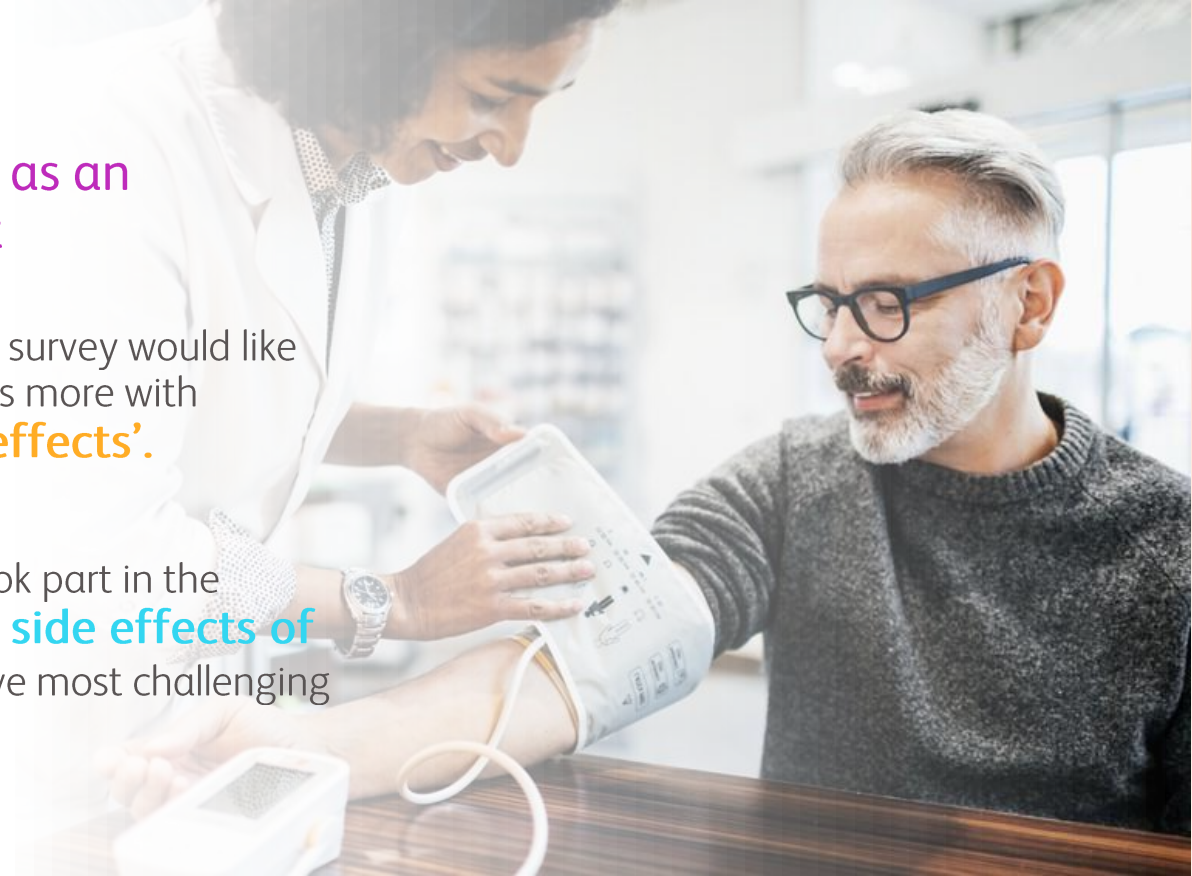
of physicians who took part in the survey would like to be able to support their patients more with **‘managing treatment side effects’**.
(from a list of 28)



Patients
Caregivers

37%

of patients and caregivers who took part in the survey selected **‘living with the side effects of the medication’** among the five most challenging stages of their condition.
(from a list of 23)



PAGs



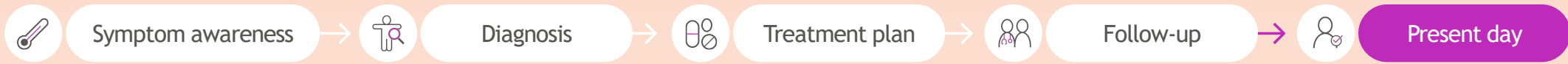
Insights from patient groups

Some patient groups that took part in the research identify that **‘coping with treatment side effects alongside disease symptoms can be a challenge for patients.’**

“Interpreting the symptoms is sometimes very difficult, but it’s a very important thing and it’s also something that people often have to deal with.”

Qualitative research

A4. At which of the following stages, if any, would you like to be able to provide more support to your patients beyond the provision of medicines and surgery, but are unable to do so currently? [select up to five from a list of 28] Base: n=120 (All physicians) A2. Thinking of your experience with [CANCER/ATRIAL FIBRILLATION] which of the following stages, if any would you say was the most challenging for [PN: PATIENT INSERT you] [PN: CARER INSERT the person you care for]? Base=30 (All patients/caregivers)



Unmet needs

The financial impact of an illness is a challenge identified by some patients & caregivers, but not by patient groups we spoke to



20%

of patients and caregivers who took part in the survey selected **‘dealing with the financial burden caused by having an illness’** among the five most challenging stages of their condition.
(from a list of 23)

23%

of patients and caregivers who took part in the survey identified **‘dealing with the financial burden caused by having an illness’** as one of the Top-5 areas where they would have valued more support.
(from a list of 23)



PAGs

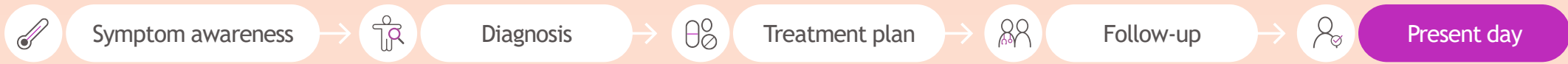


Insights from patient groups

Financial worries are not spontaneously identified as a big burden by the PAGs we spoke to in Belgium. Knowledge and emotional support are the core unmet need areas.

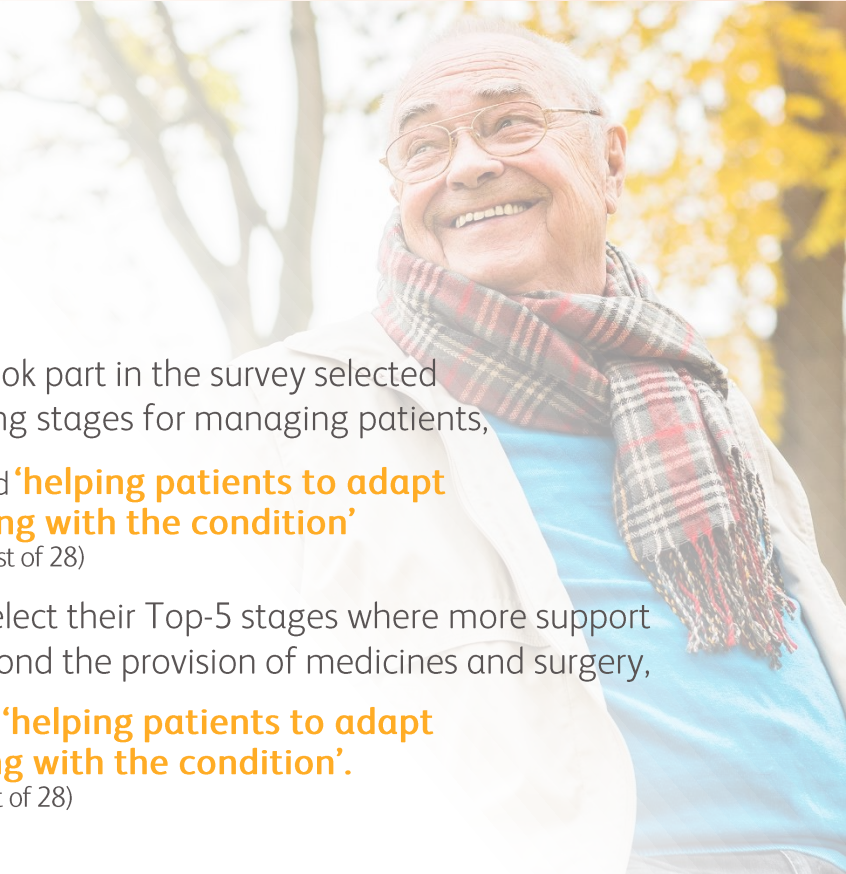
Qualitative research

A2. Thinking of your experience with [CANCER / ATRIAL FIBRILLATION] which of the following stages, if any would you say was the most challenging for [PN: PATIENT INSERT you] [PN: CARER INSERT the person you care for]? Base=30 (All patients/caregivers)
 A5. At which of the following stages, if any, do you think [PN: PATIENT INSERT you] [PN: CARER INSERT the person you care for] would have appreciated more support? [select up to 5 from a list of 23] Base=30 (All patients/caregivers)



Unmet needs

All stakeholders agree that more can be done to help patients manage & adapt to their condition



Patients
Caregivers

Among the five most challenging stages of their condition,

20% of patients and caregivers who took part in the survey selected **'managing the physical impact of the condition on the family'**.
(from a list of 23)

17% of patients and caregivers who took part in the survey selected **'learning to adapt to live with the condition'**.
(from a list of 23)

HCPs

When doctors who took part in the survey selected their Top-5 challenging stages for managing patients,

26% selected **'helping patients to adapt to living with the condition'**
(from a list of 28)

and when asked to select their Top-5 stages where more support would be valued, beyond the provision of medicines and surgery,

24% selected **'helping patients to adapt to living with the condition'**.
(from a list of 28)

PAGs

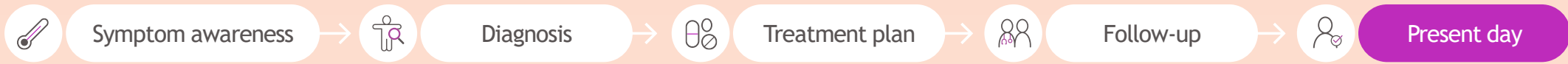
“ Insights from patient groups

Some patient groups in our research already offer a range of practical and emotional support.

“The emotional thing of trying to accept it? Accepting that you have cancer that certain things are going to change, That nothing is ever going to be the same as before. That's one of the hardest things.”

Qualitative research

A1. Thinking about your experience of treating and managing your pts, which of the following stages would you say present the most challenges to you as a physician? [select up to 5 from a list of 28] Base: n=120 (All physicians) A4. At which of the following stages, if any, would you like to be able to provide more support to your patients beyond the provision of medicines and surgery, but are unable to do so currently? [select up to 5 from a list of 28] Base: n=120 (All physicians) A2. Thinking of your experience with [CANCER/ATRIAL FIBRILLATION] which of the following stages, if any would you say was the most challenging for [PN: PATIENT INSERT you] [PN: CARER INSERT the person you care for]? Base=30 (All patients/caregivers)



Unmet needs

Carer support was identified as a need by both patients and healthcare professionals



33%

of patients and caregivers who took part in the survey selected **'carer support'** among the five services they would most like access to. (from a list of 19)



26%

of physicians who took part in the survey selected **'carer support'** among the five services that would most improve patients' experience living with their condition. (from a list of 19)



PAGs

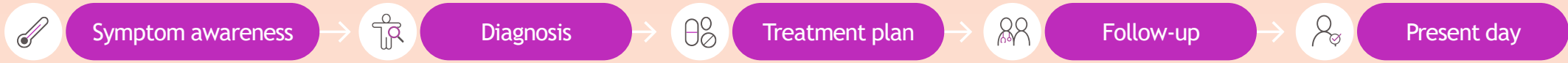


Insights from patient groups

Carer support is not spontaneously mentioned as a service by the PAGs we spoke to in Belgium.

Qualitative research

A7. Thinking about your experience of treating and managing your patients, which of the following stages would you say present the most challenges to you as a physician? [select up to five from a list of 28] Base: n=120 (All physicians)
 A8. Which of the following services would you/the person you care for like access to? (pick max. 5 items out of 19) Base: Patients/caregivers (n=30)



Unmet needs

Coping with mental stress was a common Top-5 challenge among patients and a Top-5 area where physicians want to give more support



29%

of physicians who took part in the survey select **‘helping patients to cope with the mental stress caused by the condition’** among their Top-5 as an area to provide more support to their patients, beyond the provision of medicine and surgery.
(from a list of 28)



17%

of patients and caregivers who took part in the survey select **‘coping with mental stress caused by the condition’** among their Top-5 most challenging stages for them or the person they care for.
(from a list of 23)



Insights from patient groups

Some patient groups that took part in the research identified that the physical burden of the condition brings a lot on patients’ **psychological and emotional wellbeing**, to the extent patients sometimes feel unable to turn to their immediate support network (family and friends) so peer support is vital.

“In Belgium we can always call on the psychologist at the hospital and I always try to advise people who are having a hard time to use that, both the family and the partners and the patient.”

Qualitative research

A4. At which of the following stages, if any, would you like to be able to provide more support to your patients beyond the provision of medicines and surgery, but are unable to do so currently? [select up to five from a list of 28]

Base: n=120 (All physicians)

A2. Thinking of your experience with [CANCER/AF] which of the following stages, if any would you say was the most challenging for [PN: PATIENT INSERT you] [PN: CARER INSERT the person you care for]? Base=30 (All patients/caregivers)



Symptom awareness



Diagnosis



Treatment plan



Follow-up



Present day



Unmet needs

Having enough time to spend with patients was a Top-5 challenge among physicians



HCPs

44%

of physicians who took part in the survey selected **'having sufficient time to provide adequate care to all the patients I have to manage'** among their Top-5 most challenging stages for managing patients.

(from a list of 28)



Patients Caregivers

23%

of patients and caregivers who took part in the survey selected **'more time in medical consultations'** among the five services they would most like to access to.

(from a list of 19)



Insights from patient groups



PAGs

Some patient groups from our research also identify a challenge, that patients receive a lot of information about their condition and how it might affect their life in various ways, which can be very **overwhelming**, meaning many don't have the headspace to ask healthcare professionals important questions about their care.

Qualitative research

A1. Thinking about your experience of treating and managing your patients, which of the following stages would you say present the most challenges to you as a physician? [select up to five from a list of 28] Base: n=120 (All physicians)

A8. Which of the following services, if any, would you/the person you care for like access to? [select up to 5 from a list of 19] Base=30 (All patients/caregivers)



Views & perceptions of pharma

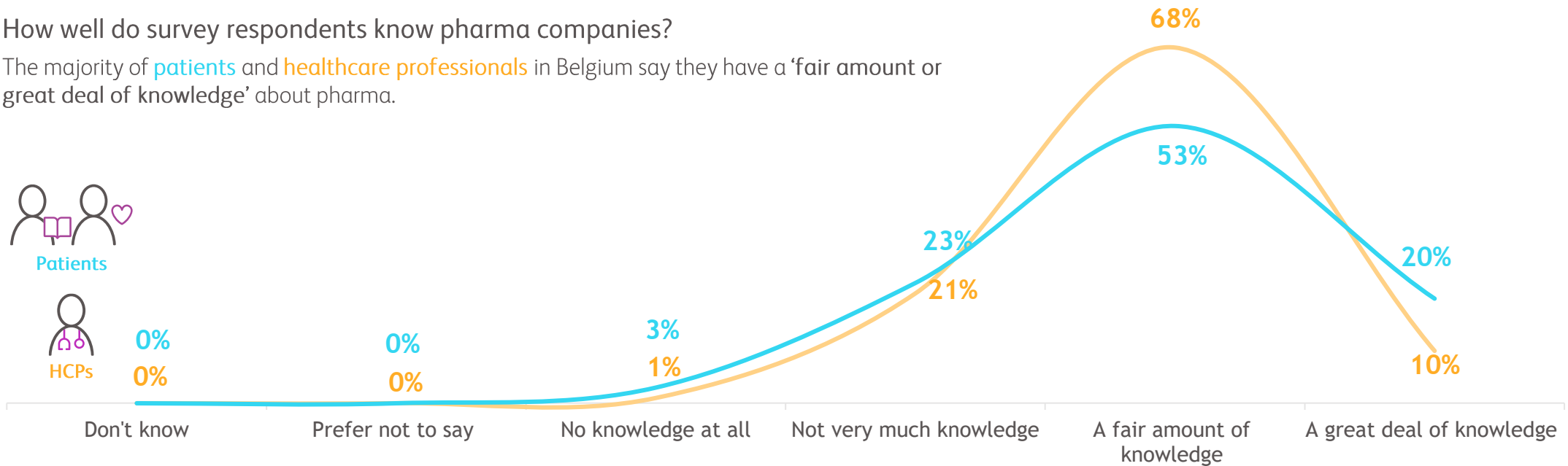
Toward new roles for pharma

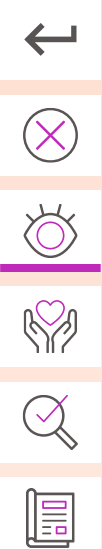
How can we best take action to help support patients' unmet needs?

Reflecting on the unmet needs voiced by patients and professionals in this survey, the rich and informative feedback that was shared reveals new areas where respondents think pharma can do more. The following two sections present these groups' current views of pharma and their suggestions for how pharma can support in new ways.

How well do survey respondents know pharma companies?

The majority of patients and healthcare professionals in Belgium say they have a 'fair amount or great deal of knowledge' about pharma.





Views & perceptions of pharma

However, very few physicians currently see pharma as a partner for providing patient care

Only **4%**
HCPs

of healthcare professionals who took part in the survey say that pharma is **currently important in providing overall care to patients.**

While they see hospital nurses (55%), other physicians (49%) and social services (40%) as the most important partners.
(when selecting up to three options from a list of 14)

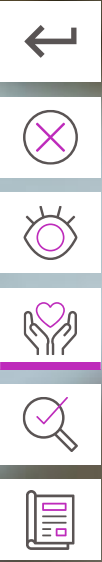


Views & perceptions of pharma

Most healthcare professionals & patients want to see pharma have a positive impact beyond the delivery of medicines



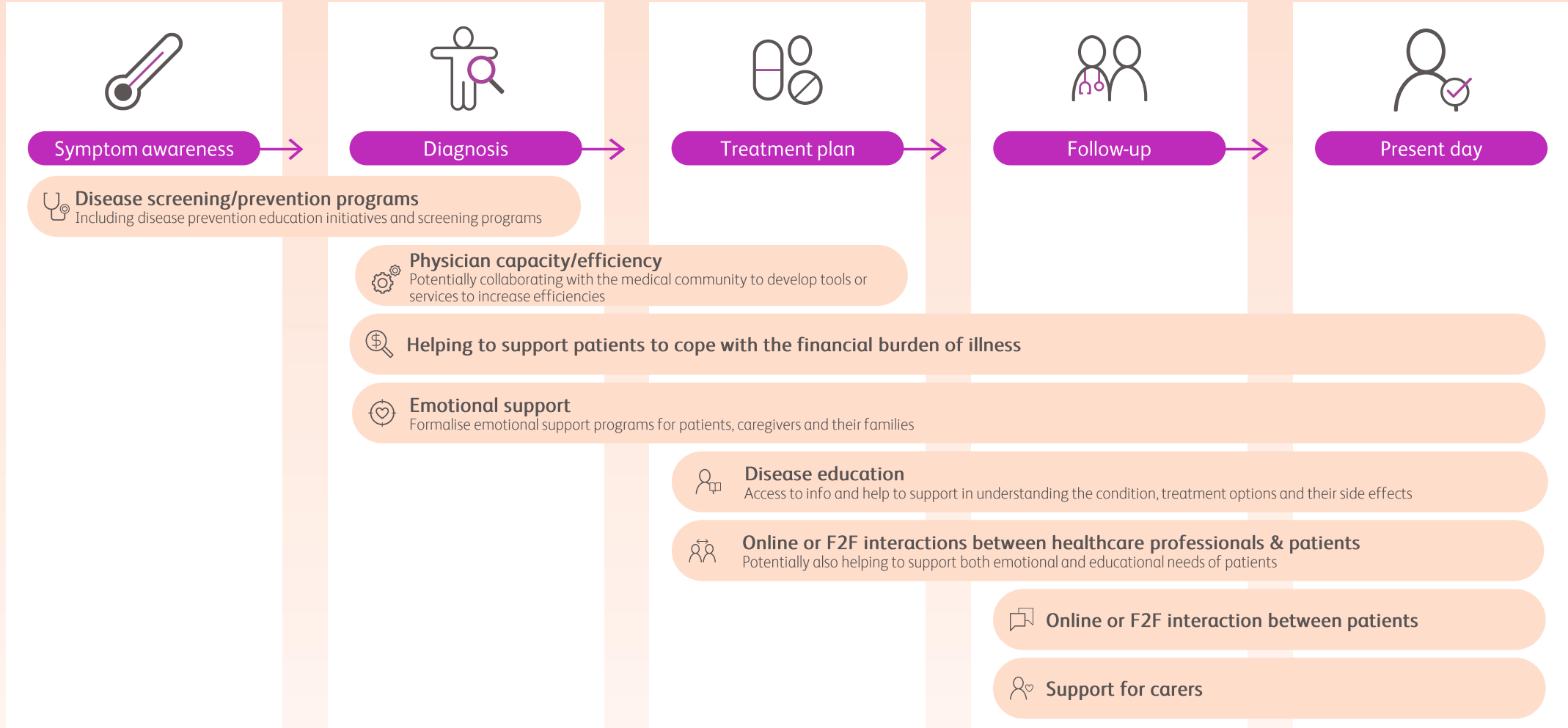
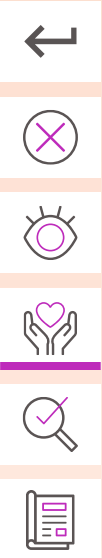
B3/B4. To what extent do you agree or disagree that pharmaceutical companies should do the following? [1=Strongly disagree, 2=Tend to disagree, 3=Neither agree nor disagree, 4=Tend to agree, 5=Strongly agree, Don't know, Prefer not to say (Total patients/caregivers n= 30, physicians n=120)]

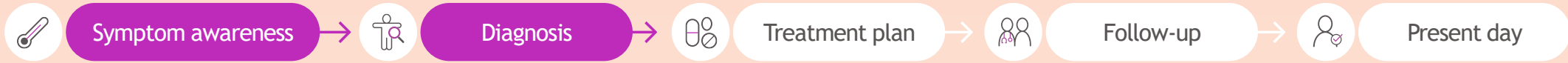


How pharma can support peoples' needs

How can BMS help support patients, carers & physicians?

Patients, carers, patient association groups and physicians in Belgium identified solutions that can improve patient experiences along their journey.





How pharma can support

Patients would like pharma to address the causes of disease in addition to providing medicines



HCPs

13%

of physicians who took part in the survey selected **'disease prevention programs'** among the five services that would most improve patients' experience of living with their condition. (from a list of 19)



Patients
Caregivers

17%

of patients and caregivers who took part in the survey selected **'disease prevention programs'** among the five services they would most like to see better supported by pharma. (from a list of 13)

30%

of patients and caregivers who took part in the survey selected **'disease screening'** among the five services they would most like to see better supported by pharma. (from a list of 13)



Insights from patient groups



PAGs

Screening programs are not spontaneously mentioned as a service by the patient groups we spoke to in Belgium. Disease awareness and early signs detection are more likely to be mentioned.

Qualitative research

A7. Which, if any, of the following services would improve patients' experiences living with their conditions? [Select up to 5 from a list of 19] Base: n=120 (All physicians)

C2. Which, if any, of the following services would you like to see better supported by pharmaceutical companies? / Carer: Thinking of the person who you currently care for, which, if any, of the following services would you like to see better supported by pharmaceutical companies? [Select up to 5 from a list of 13] Base:30 (All patients/caregivers)



How pharma can support

Potentially collaborating with health-tech or the medical community to support physicians' capacity could be valuable



HCPs

10%

of physicians who took part in the survey who selected **'insufficient physician time or capacity'** as an unmet need, think it could be addressed in collaboration with the pharmaceutical industry.

(selecting from a list of 12 potential unmet needs)



Patients Caregivers

23%

of patients and caregivers who took part in the survey selected **'health technology companies'** among the Top-5 groups they think pharmaceutical companies should be cooperating more with.

(from a list of 12)

23%

of patients and caregivers who took part in the survey selected **'healthcare professionals and the medical community'** among the Top-5 groups they think pharmaceutical companies should be cooperating more with.

(from a list of 12)



PAGs



Insights from patient groups

Support hospitals to ensure that no patients miss out on the psychological support they are eligible for. Pharma can also help facilitate peer support systems and buddy schemes. These are two things the patient groups who took part in our research listed as areas for collaboration.

"Some people indicate that they are offered so little psychological support or practically none."

Qualitative research

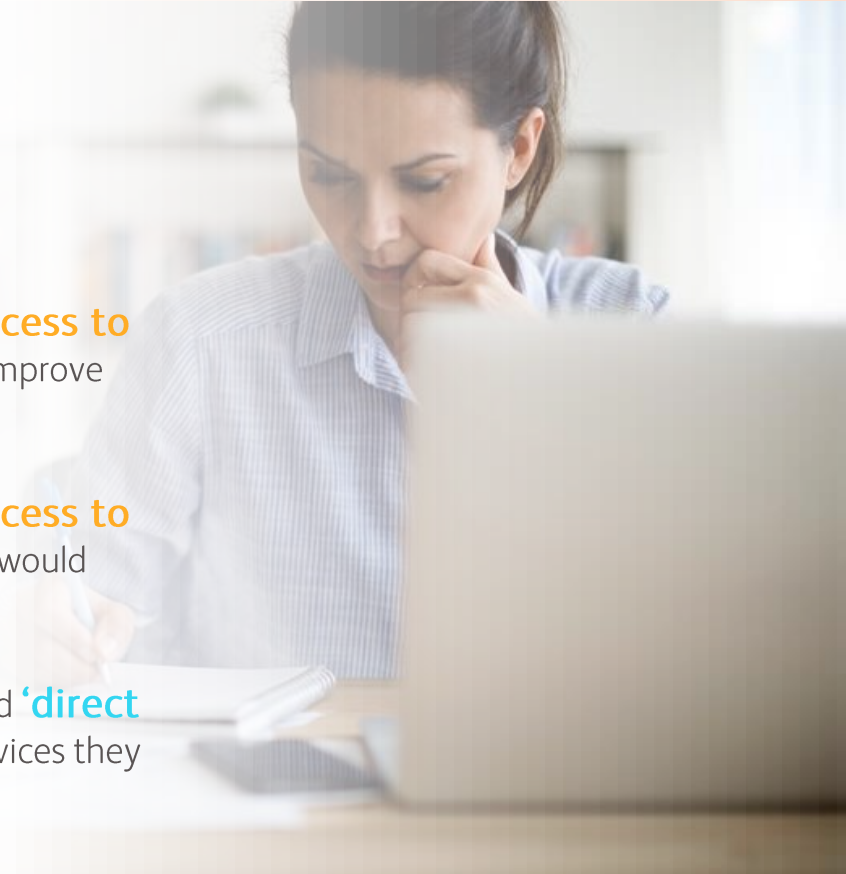
A9. Beyond medication, which if any, of these unmet needs do you think could be addressed in collaboration with the pharmaceutical industry to support your patients? Base: Physicians who think there are needs that can be addressed by pharma (n=117)

C3. Which, if any, of the following people or groups do you think pharmaceutical companies should be cooperating with more? Base: Patients/caregivers (n=30)



How pharma can support

Some patients in Belgium would like access to direct financial support



HCPs

18%

of physicians who took part in the survey selected **'direct access to practical support'** among the Top-5 services that would improve patients' experience living with their condition.
(from a list of 19)

19%

of physicians who took part in the survey selected **'direct access to financial support plans'** among the Top-5 services that would improve patients' experience living with their condition.
(from a list of 19)



Patients
Caregivers

13%

of patients and caregivers who took part in the survey selected **'direct access to financial support plans'** among the five services they would most like access to.
(from a list of 19)



Insights from patient groups



PAGs

The financial burden experienced by patients was not a big topic among the patient groups we spoke to in Belgium. It appears that there are some services quite readily available to patients, such as psychologist support, that aren't as available in other markets.

Qualitative research

A7. Which, if any, of the following services would improve patients' experiences living with their conditions? [Select up to 5 from a list of 19] Base: n=120 (All physicians)

A8. Which of the following services would you/the person you care for like access to? (pick max. 5 items out of 19) Base: Patients/caregivers (n=30)



How pharma can support

Facilitating emotional support for patients, their families & caregivers



HCPs

29%

of physicians who took part in the survey select **‘helping patients to cope with the mental stress caused by the condition’** among their Top-5 areas to provide more support to their patients, beyond the provision of medicine and surgery.
(from a list of 28)



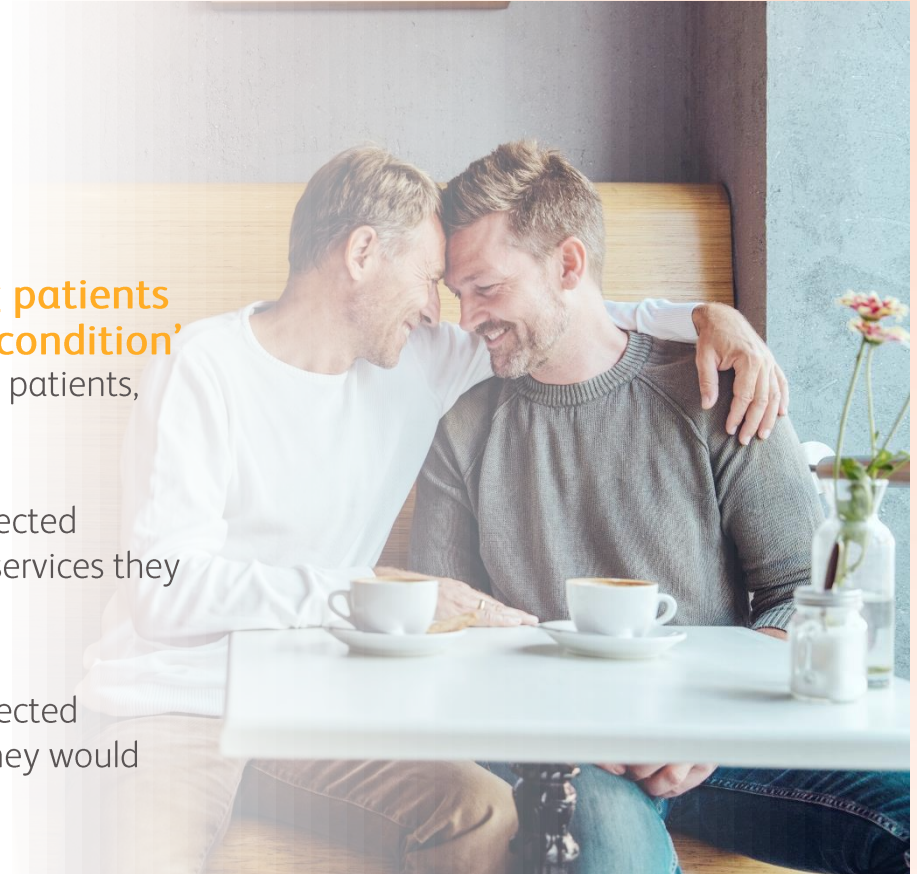
Patients
Caregivers

40%

of patients and caregivers who took part in the survey selected **‘emotional support for patients’** among the five services they would most like to see better supported by pharma.
(from a list of 13)

27%

of patients and caregivers who took part in the survey selected **‘post treatment services’** among the five services they would most like to see better supported by pharma.
(from a list of 13)



PAGs



Insights from patient groups

“We have a secret Facebook group where only patients can be on and their loved ones, because we always work with the patients and their loved ones there.”

A patient group from our research

“We organise a run together twice a week, and there also is the possibility to participate in a Nordic walking group once a week. We also organise buddy support for those who are in need.”

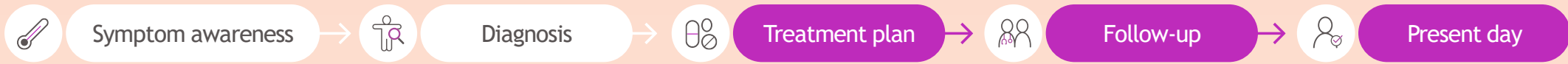
A patient group from our research

Qualitative research

A4. At which of the following stages, if any, would you like to be able to provide more support to your patients beyond the provision of medicines and surgery, but are unable to do so currently? [select up to five from a list of 28]

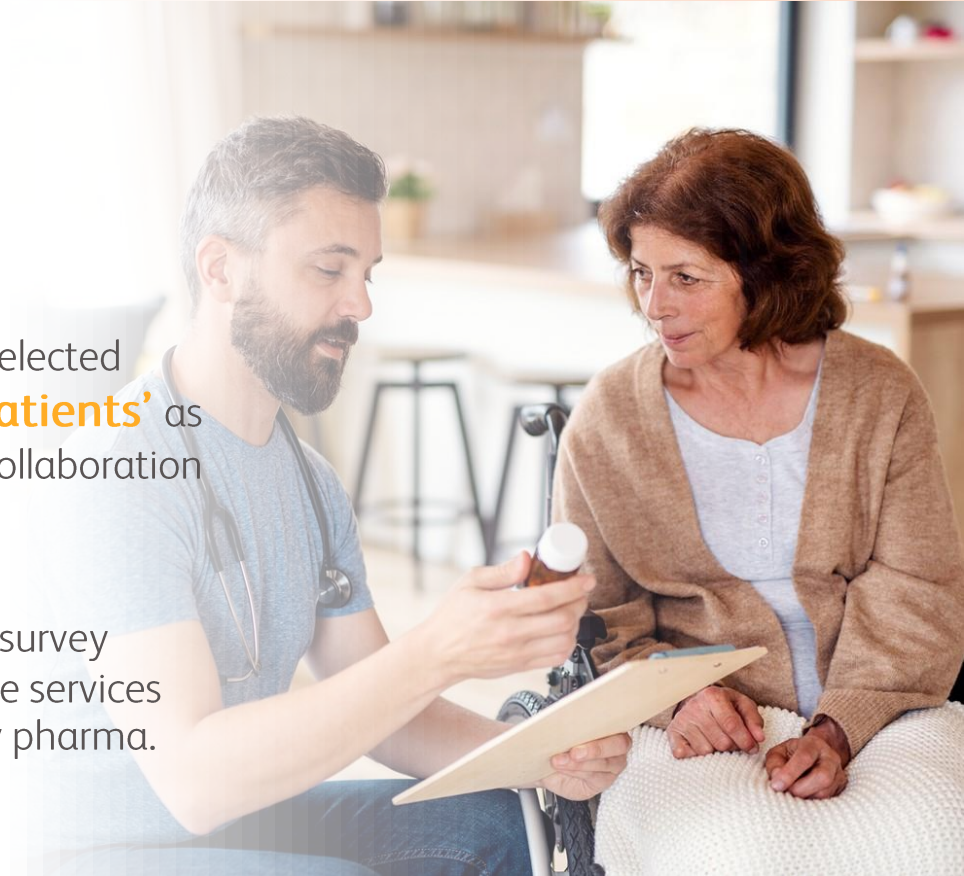
Base: n=120 (All physicians)

C2. Select item importance (pick max. 5 items out of 13) - Which, if any, of the following services would you like to see better supported by pharmaceutical companies? Base:30 (All Patients/caregivers)



How pharma can support

There is some consensus among physicians & patients that patient education could be addressed by pharma



HCPs

15%

of physicians who took part in the survey who selected **‘insufficient disease information for patients’** as an unmet need, think it could be addressed in collaboration with the pharmaceutical industry.
(selecting any from a list of 12 potential unmet needs)



Patients
Caregivers

30%

of patients and caregivers who took part in the survey selected **‘disease education’** among the five services they would most like to see better supported by pharma.
(from a list of 13)



Insights from patient groups



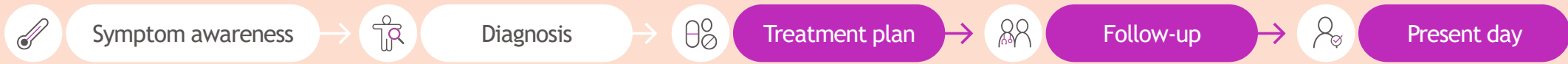
PAGs

Information provision on the various aspects of what to expect when you are living with and fighting cancer make up a large part of the role and goals of patient groups we spoke to. Most recognise this is something that patients rely on them for, however not all feel they always have the most up-to-date information, or fullest knowledge to educate the patients and loved-ones as best they can.

Qualitative research

A9. Beyond medication, which if any, of these unmet needs do you think could be addressed in collaboration with the pharmaceutical industry to support your patients? Base: Physicians who think there are needs that can be addressed by pharma (n=117)

C2. Which, if any, of the following services would you like to see better supported by pharmaceutical companies? / Carer: Thinking of the person who you currently care for, which, if any, of the following services would you like to see better supported by pharmaceutical companies? [Select up to 5 from a list of 13] Base:30 (All Patients/caregivers)



How pharma can support

Supporting or facilitating different platforms for healthcare professionals & patient interactions could be beneficial



Face-to-face
30%

of patients and caregivers who took part in the survey selected **'face to face support groups with healthcare professionals'** among the five services they would most like to see better supported by pharma. (from a list of 13)



Face-to-face
24%

of physicians who took part in the survey selected **'face-to-face support groups with healthcare professionals'** among the five services that would most improve patients' experience living with their condition. (from a list of 19)

Online support
30%

of patients and caregivers who took part in the survey selected **'online support groups with healthcare professionals'** among the five services they would most like to see better supported by pharma. (from a list of 13)

Online support
5%

of physicians who took part in the survey selected **'online support groups with healthcare professionals'** among the five services that would most improve patients' experience living with their condition. (from a list of 19)



PAGs



Insights from patient groups

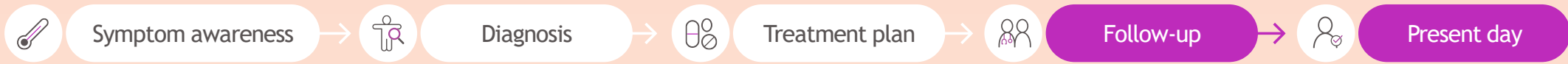
Among the patient groups we spoke with in Belgium, connecting healthcare professionals and patients to enhance knowledge is seen as an appropriate space for pharma to have greater involvement.

"Yes when it comes to F2F healthcare professional groups, that's already being done, so when we give an Info Day or when there's an Info Day in a hospital it's usually supported by pharmaceutical companies, these are good."

Qualitative research

A7. Which, if any, of the following services would improve patients' experiences living with their conditions? [Select up to 5 from a list of 19] Base: n=120 (All physicians)

C2. Which, if any, of the following services would you like to see better supported by pharmaceutical companies? / Carer: Thinking of the person who you currently care for, which, if any, of the following services would you like to see better supported by pharmaceutical companies? Base:30 (All patients/caregivers)



How pharma can support

Patients & carers would also like to see pharma support online and F2F peer support groups



Face-to-face

30%

of patients and caregivers who took part in the survey selected **'face-to-face support groups with other patients with the same condition'** among the five services they would most like to see better supported by pharma.
(from a list of 13)

Online support

17%

of patients and caregivers who took part in the survey selected **'online support groups with other patients with the same condition'** among the five services they would most like to see better supported by pharma.
(from a list of 13)



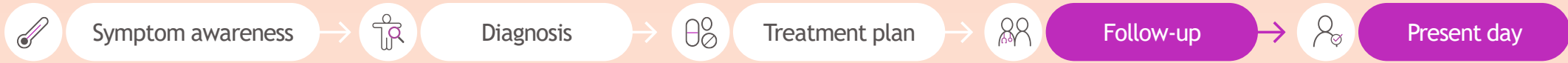
PAGs



Insights from patient groups

Most of the patient groups that took part in our research spoke of the importance of **patient peer support groups, whether that be online or F2F, it is generally felt that is a key part to patients and their loved ones coping** and adapting to living with cancer and the various burdens and obstacles associated with it.

Qualitative research



How pharma can support

Some consensus that providing support for carers of patients could be addressed by pharma



23%

of patients and caregivers who took part in the survey selected **'carer support'** among the five services they would most like to see better supported by pharma.
(from a list of 13)



15%

of physicians who took part in the survey who selected **'insufficient guidance or education for carers in supporting their loved ones'** as an unmet need, think it could be addressed in collaboration with the pharmaceutical industry.
(from a list of 12)



PAGs



Insights from patient groups

Carer support is not spontaneously mentioned as a service by the PAGs we spoke to in Belgium.

Qualitative research

A9. Beyond medication, which if any, of these unmet needs do you think could be addressed in collaboration with the pharmaceutical industry to support your patients? Base: Physicians who think there are needs that can be addressed by pharma (n=117) C2. Which, if any, of the following services would you like to see better supported by pharmaceutical companies? / Carer: Thinking of the person who you currently care for, which, if any, of the following services would you like to see better supported by pharmaceutical companies? Base:30 (All patients/caregivers)



Our commitment to next steps

Key findings & conclusions from our discussion with patient association groups

Groups we spoke to as part of our research would like support from pharma but want pharma's help where it makes most sense



Patient association groups need help raising knowledge on disease generally, and more specifically on available and new treatments for patients.

Working with patient groups to educate on the various signs and symptoms of cancer, and how to manage the various aspects of fighting cancer such as side effects, treatment options etc.



Lobby for better education and testing for earlier diagnosis of some cancers.

Disease prevention and getting cancer diagnosed earlier is key for many groups. Some report that having a lengthy diagnosis journey could worsen patients' prognosis. Lobbying for education and testing protocols is where pharma could help.



Create more space for patients and healthcare professionals to interact outside of appointments.

BMS could help host events such as Q&A sessions and healthcare panels, which would give patients the space to ask more questions in a reflective atmosphere. Many don't have the capacity to ask these questions during their appointments, due to limited time or information overload.



Help facilitate greater peer support, such as buddy schemes.

Though patient groups do not want pharma overly involved in emotional support initiatives, pharma could help patient groups to set up more sophisticated support networks such as buddy support schemes which some groups mentioned as a goal.

Our starting point for new partnerships in Belgium

We have heard you. We commit to taking action together with you

What we have heard from you

The feedback that you have shared in this patient & professional surveys is enlightening. We appreciate your candid input.

With the initiative 'Because there is more to do' we embarked on a journey to learn more about your situations, your concerns, **what you expect of us, and where you think pharma can do more** to help support patients and society in Belgium.

Our journey together starts today

We will now build on what we have learned from you. The next step is deeper engagement, to explore where we can most effectively support your needs.

In the coming months we will open a wider dialogue with the healthcare industry.

Is there a role for BMS & pharma in Belgium?

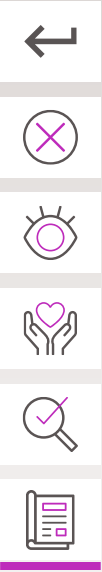
We wanted to understand if there is a role for BMS and pharma in Belgium beyond delivering innovative medicines. And if so, what is it?

Your responses tell us that pharma has a role to play.

Our commitment: what you can expect from BMS

The conclusion of this report is the beginning of our future journey together. We commit to working with you to take action in areas you have defined, including: **new partnerships with patient organisations and healthcare professionals.**





Technical notes

Technical notes



Technical Note - Patient and Caregiver Survey

On behalf of Bristol Myers Squibb, Ipsos MORI carried out an online survey with a sample of 214 patients and caregivers (oncology patients, oncology caregivers, atrial fibrillation patients, atrial fibrillation caregivers) across eight European countries (Austria, Belgium, Denmark, Finland, Netherlands, Norway, Sweden, Switzerland). Online surveys were conducted between 11th January 2021 and 26th April 2021.

Respondents were recruited via online panels, and as such, the sample contains respondents who are engaged with market research panels and chose to take part in the survey.

The sample includes the following per country:

	AT	BE	DK	FI	NL	NO	SE	CH
Total	30	30	20	30	30	15	29	30
Oncology patients	8	8	8	8	8	10	8	8
Oncology caregivers	7	7	7	7	7	5	7	7
Atrial fibrillation patients	8	8	3	8	8	0	8	8
Atrial fibrillation caregivers	7	7	2	7	7	0	6	7

When reporting on country results survey data are weighted to ensure equal contribution of oncology patients/caregivers and atrial fibrillation patient/caregivers within a country*. When reporting at a total level data are additionally weighted to ensure equal contribution per country.

* Except in Norway, where the sample consists only of oncology patients/caregivers, and so no weighting was applied.

Technical Note - Healthcare Professional Survey

On behalf of Bristol Myers Squibb, Ipsos MORI carried out an online survey with a sample of 839 healthcare professionals (primary care physicians, cardiologists and oncologists/haematologists) across eight European countries (Austria, Belgium, Denmark, Finland, Netherlands, Norway, Sweden, Switzerland). Online surveys were conducted between 11th January 2021 and 26th April 2021.

Respondents were recruited via online panels, and as such, the sample contains respondents who are engaged with market research panels and chose to take part in the survey.

The sample includes the following per country:

	AT	BE	DK	FI	NL	NO	SE	CH
Total	105	120	100	93	120	70	116	115
PCPs	50	50	50	51	50	42	50	50
Cardiologists	30	40	30	22	40	18	40	40
Oncologists/haematologists	25	30	20	20	30	10	26	25

When reporting on country results, survey data are weighted to ensure equal contribution from primary care physicians, cardiologists and oncologists/haematologists. When reporting on total results survey data are additionally weighted to ensure equal contribution per country.

Technical Note - Patient Advisory Group Qualitative Research:

On behalf of Bristol Myers Squibb, Ipsos MORI conducted exploratory qualitative research in eight European markets (Austria, Belgium, Denmark, Finland, Netherlands, Norway, Sweden, Switzerland). In total, 40 respondents completed a web-assisted telephone in-depth interview (37 respondents were working for an oncology patient advisory group, 3 for an atrial fibrillation patient advisory group). Respondents were recruited via telephone through third party panel providers. Interviews were carried out between 11th January 2021 and 26th April 2021.

Please note that this qualitative research approach explores the range of attitudes and opinions of participants in detail and that the findings are descriptive and illustrative, not statistically representative.

Technical Note - Single-blinded Open Invitation Digital 'Humanity' Survey:

On behalf of Bristol Myers Squibb, Ipsos MORI carried out an online survey with a sample of 821 adults aged 16 and over, across nine European countries (Austria, Belgium, Denmark, Finland, Luxembourg, Netherlands, Norway, Sweden, Switzerland). Interviews were conducted between 20th November 2020 and 18th January 2021.

Respondents were invited to respond to an open invitation from Bristol Myers Squibb to share their views and suggestions on their opinions of the pharmaceutical industry, pharmaceutical companies and the challenges they face regarding healthcare provision in their country. This invitation was shared in a range of paid advertising channels on websites and social media, but also direct emails and organic posts:

- paid post on LinkedIn;
- organic posts on LinkedIn;
- direct email to BMS employees;
- hosting on Bristol Myers Squibb websites.

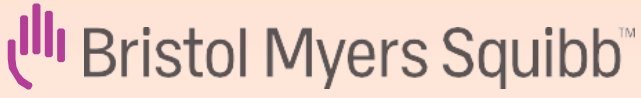
As such, the sample includes a mix of respondents who responded to the online campaign and chose to take part and is not a representative sample of the population of the countries included in the campaign. It is also likely respondents are already engaged with Bristol Myers Squibb and/or the pharmaceutical industry in general. The sample includes members of the public, patients, caregivers, healthcare professionals, pharmaceutical industry employees and their friends and family. Results are indicative in nature and reflect the responses of the survey participants only. Participants outside of the countries listed were screened out and could not participate.

In total there were 129,688 clicks onto the survey, with 821 respondents completing the survey.

The sample includes the following per country:

	AT	BE	DK	FI	LU	NL	NO	SE	CH
Total	82	325	33	30	0	193	35	55	68
Healthcare professionals	20	60	14	11	0	19	9	10	16
Patients or caregivers	16	105	8	6	0	79	11	13	19
Pharma company employees	22	96	4	8	0	39	7	7	24
Other	34	119	13	14	0	79	12	33	23

When reporting on global results, all participants are included and no weighting has been applied to the data.



Because there is more to do



We are listening



We have heard you



Let's act together!