

ISPOR Europe 2025

Glasgow, Scotland | 9–12 November 2025



ISPOR Europe 2025 Report: Key trends, insights and opportunities



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Our team attended ISPOR Europe 2025, where we contributed our expertise across multiple sessions and engaged in discussions shaping the future of health economics and outcomes research (HEOR).

This report summarizes the major themes we identified as emerging from ISPOR Europe 2025 and highlights the related scientific contributions we made throughout the diverse conference program.

PPD™ Evidera™ Solutions
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Health Technology Assessment (HTA) & Market Access Strategy

Top 3 themes

- Applying learnings from early joint clinical assessments (JCAs) to strengthen EU HTA submission readiness
- The importance of "decision-grade" real-world evidence (RWE) to meet the need of regulators and HTA agencies
- A growing need for rigorous, fit-for-purpose health economic modelling to support reimbursement dossiers

Our related presentations and posters

- **Educational Symposium:** *Strategic Insights from 5 Years of the EU HTA Regulation: Unleashing the Ambition for Orphan Products and Vaccines*
- **Poster:** *Challenges in Predicting the Joint Clinical Assessment (JCA) Scope*
- **Poster:** *Navigating Evidence Requirements for JCA: Practical Considerations for SLR and ITC*
- **Poster:** *From JCA to Local P&R: Evaluating Impact Across Europe*
- **Poster:** *Have Delays in Vaccine Market Access Improved in Europe and the US Over the Last Decade?*

Turning trends into opportunities

With more than 30 years of proven expertise in tackling HEOR and HTA challenges, we help clients stay ahead in an evolving policy landscape. Our multidisciplinary team expertly unites scientific rigor, strategic insight, commercial acumen, and technical excellence to overcome the complexities of the EU HTA regulation and US Inflation Reduction Act (IRA) – driving successful HTA outcomes and accelerating patient access to innovations.

Artificial intelligence (AI) & automation in evidence generation

Top 3 themes

- How to utilize generative AI and Large Language Models (LLMs) for qualitative data coding, synthesis, and predictive modeling
- Methodological innovation (e.g., multi-agent AI, LLM hallucination reduction) to enhance efficiency and reliability in HEOR workflows
- Focus on human–machine collaboration to free scientific experts for higher-order tasks

Our related presentations and posters

- **Workshop:** *Building Multi-Agent AI Systems to Reduce SME Burden in Health Economics Research*
- **Issue Panel:** *Trusting a Machine? Opportunities and Challenges to Using Artificial Intelligence in Qualitative Patient Research*
- **Poster:** *A Layered Approach to Reducing Hallucinations in LLMs for Clinical Data*
- **Poster:** *AI-Assisted Time-to-Event Projection: A Case Study and Broader Potential*
- **Poster:** *Enhancing Targeted Literature Reviews (TLRs) with AI*
- **Poster:** *Exploring the Promise of Generative AI for Coding and Analysing Qualitative Patient Data*
- **Poster:** *Using a Large Language Model (LLM) for Data Extraction of Studies*

Turning trends into opportunities

We're defining best practices for the use of AI in evidence generation – not just applying the technology. In doing so, we address the key barriers to AI adoption in health research; the issues of trust, quality assurance, and transparency, to provide fast, reliable and enhanced insights that drive our clients' informed decision-making.

Real-world evidence (RWE) & registries

Top 3 themes

- Innovative real-world data (RWD) solutions spanning multiple therapeutic areas and geographies
- Increasing focus on the use of RWD for external control data to support regulatory decisions
- Rising demand for global registry designs that support regulatory-grade evidence generation

Our related presentations and posters

- **Forum:** *Harmonizing and Enabling Cross-Border Real-World Evidence Studies in Europe*
- **Workshop:** *Real-World Evidence – From the Clinician's Perspective*
- **Poster:** *Cross-Sectional Cohort Designs Offer Efficient Alternatives in Real-World Studies*
- **Poster:** *Data Reliability in Retrospective Chart Review Studies*
- **Poster:** *Development of a Framework for Registry Data Quality*
- **Poster:** *Real-World Cancer Treatments for Common Solid Tumors in China*
- **Poster:** *Millennial Medical Record (MMR) Database: EMR Utilising Unstructured Data*
- **Poster:** *Integrating Real-World Evidence into Oncology HTA Submissions: Recent EU Examples*

Turning trends into opportunities

Our fit-for-purpose RWD and RWE solutions leverage proprietary, primary and secondary data sources to address the most challenging research questions, providing the robust, reliable, and regulatory-grade evidence needed to support safety, effectiveness and value demonstration.

Patient-centric outcomes & preference research

Top 3 themes

- The growing importance of the "patient voice" in successful HTA submissions
- Utilizing patient research techniques for systematically incorporating patients' perspectives, needs and experiences into HTA decision-making
- Integrating qualitative depth into quantitative preference modeling

Our related presentations and posters

- **Workshop:** *COAs and Patient Preference Information: Building on a Promising but Challenging Relationship*
- **Workshop:** *A Match Made in Heaven? Optimal Selection of Preference Elicitation Methods to Address Study Purpose and Objectives*
- **Poster:** *A Review of Information Uncertainty in Oncology Treatment Preferences*
- **Poster:** *Framing Matters! Implications of Loss Aversion in Preference Studies*
- **Poster:** *Patient and Caregiver Perspectives in Relapsed/Refractory AML*

Turning trends into opportunities

Our best-in-class patient-centric evidence strategies go beyond clinical and economic data to capture the real impact of treatment according to those who matter the most – patients. By uncovering patients' lived experiences, needs and preferences through qualitative and quantitative insights, we empower clients to demonstrate the intrinsic value of their product and drive greater access.

Methodological Innovation in Economic Evaluation

Top 3 themes

- Continued debate around threshold uncertainty and decision logic in cost-effectiveness analysis
- Application of the latest statistical and AI techniques for model calibration and validation
- The advancement in methods for indirect treatment comparisons (ITCs) and the increasing importance of ITCs in submissions to HTA bodies

Our related presentations and posters

- **Issue Panel:** *The Variable Thresholds Issue: A Necessary Tool or a Misguided Obsession?*
- **Poster:** *Anchors Away: Navigating Unanchored Indirect Comparisons with ML-UMR*
- **Poster:** *From Theory to Practice: Guidance for Selecting Mapping Algorithms*
- **Poster:** *Evidence of Mapping Malpractice? Review of Mapping Algorithms in NICE Appraisals*
- **Poster:** *Methods for Incidence Progression Estimation in Partitioned Survival Analysis*

Turning trends into opportunities

We push methodological boundaries—blending academic rigor with practical relevance, leading the way to the standardization of best practices for health economic modeling and evidence synthesis. With almost 40 years of experience in the field, you can trust us to understand and unlock the full value of your product.

White paper

The power of patients: Unlocking EU HTA regulation success through patient insight

Critical aspects
A critical aspect of Project HERCULES is the active involvement of patients and families in the development process. This involves...

Conclusion
Project HERCULES is a significant advancement in patient-centric outcome development in HTA.

MI PREFER COPD study design
The study identified that patients and caregivers have a strong interest in understanding of patient-reported symptoms and treatment outcomes.

Study results
The study identified that patients and caregivers have a strong interest in understanding of patient-reported symptoms and treatment outcomes.

Critical aspects
A key takeaway from the study is that it should target the symptoms that patients find most important and use patient-reported outcomes to measure the impact of treatment.

Conclusion
The findings of the MI PREFER COPD study demonstrate the importance of patient engagement in HTA development. The study highlights the need for more structured guidance to support the systematic incorporation of patient perspectives into HTA development.

How should HTAs involve patients in their development strategy?
While there is no universally accepted good practice or standard framework, specifically relating to patient involvement in HTA development, HTA can take inspiration from many good practice examples and use studies.

How to highlight to patients more precisely the different aspects in which patients' insights can impact development strategy. Specifically, it is useful to distinguish between two different approaches: patient engagement and patient insight collection and two different goals (patient design and endpoint selection).

Patient engagement
It is a good practice to engage patients' perspectives of goals and patient insight method. Patient engagement is "the active, meaningful, and collaborative interaction between patients and researchers across any but identity of stages of the research process, where decision-making is guided by patients' contributions as partners, recognizing their specific experiences, values, and expertise." HTA engagement with patients should be guided by the principles of patient-focused drug development.

Patient insight collection
Patient insight collection is a structured approach to research the power of patients. Unlocking EU HTA regulation success through patient insight.

Table 1: Various methods used to capture patient insights

Methods	Purpose
Qualitative Interviews / Focus Groups	Identify key patient outcomes and understand patient priorities
Quantitative Interviews / Surveys	Identify key and measure patient priorities on treatment burden
Patient Experience Surveys	Identify key and measure patient priorities on treatment burden
Patient Reported Outcomes	Measure patient-reported outcomes
Patient Preference Studies	Identify key patient outcomes and understand patient priorities
Social Media & Online Forums	Identify key patient outcomes and understand patient priorities
Delphi Panels	Structured approach to research the power of patients. Unlocking EU HTA regulation success through patient insight.

Case study 1: Patient-centric outcome development by COPD Foundation: PIVOT (Patient-Inspired Validation of Outcome Tools)

Introduction
The COPD Foundation developed a patient-centric framework known as PIVOT (Patient-Inspired Validation of Outcome Tools) to coordinate the development, validation, and regulatory qualification of patient-centric outcome assessments across chronic lung diseases, starting with Chronic Obstructive Pulmonary Disease (COPD).

Conclusion
The PIVOT framework developed a patient-centric framework known as PIVOT (Patient-Inspired Validation of Outcome Tools) to coordinate the development, validation, and regulatory qualification of patient-centric outcome assessments across chronic lung diseases, starting with Chronic Obstructive Pulmonary Disease (COPD).

Case study 2: Patient-centric outcome development - Duchenne UK: Project HERCULES (Health Research Collaboration Outcome in Leading Evidence Synthesis)

Introduction
Duchenne UK launched Project HERCULES (Health Research Collaboration Outcome in Leading Evidence Synthesis), a global, multi-stakeholder initiative aimed at strengthening the patient voice in health technology assessment (HTA) of Duchenne muscular dystrophy (DMD) treatments.

Conclusion
Project HERCULES aims to develop a standardized set of patient-reported data and tools to streamline and harmonize requirements for new DMD therapies. This initiative unites pharmaceutical companies, patient organizations, clinicians, academics, HTA agencies, and other stakeholders through no collaboration.



[Read the white paper](#)



**We're proud to support ISPOR's mission
to advance HEOR excellence, ultimately
improving decision-making for better
global healthcare outcomes.**

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