What you need to know about...

Patients of the Future

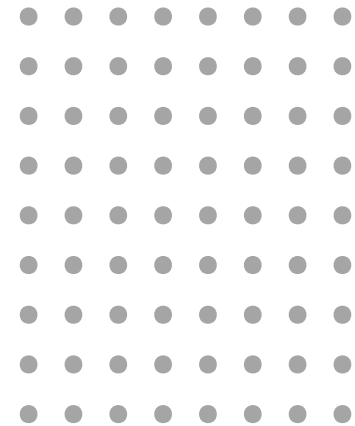Hall & Partners

think next

Introduction

'Patient Trendscoping' delves into the changing picture of patient needs.

This new study reveals insights from a representative sample of **10,500 adults spanning US, China, Japan, UK & Germany.**

This document explores a selection of data points from this syndicated 'Patient Trendscoping' study.
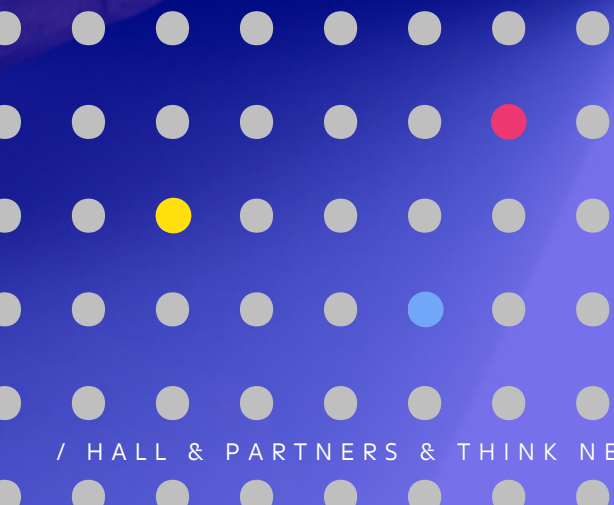
Agenda

- **People Not Patients**

- **Inclusive Healthcare, by design**

- **Truth Searching**

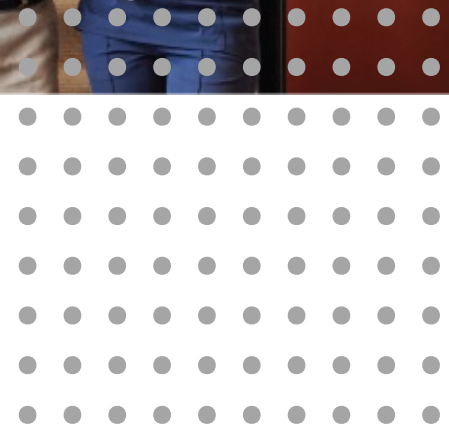- **Changing Needs 'Around the Pill' Support**
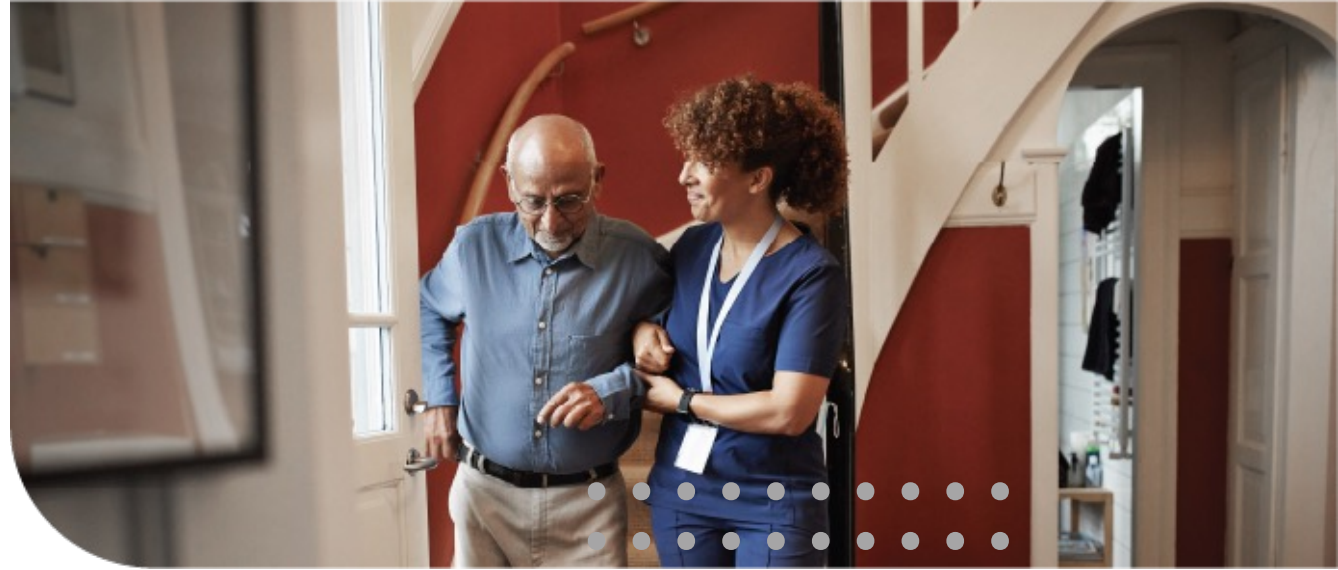
People not Patients
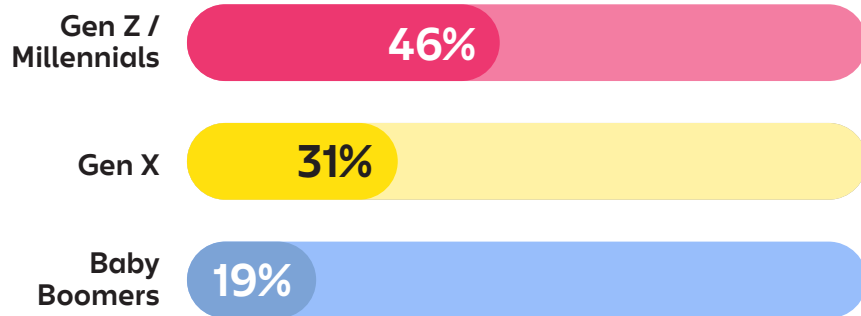
The breakdown of
HCP/patient relationships

The perfect storm is brewing for a large shift in HCP/patient relationships.

Patients want to be seen as people, first and foremost.

In our busy lives, time is of the essence… and lack of time creates tension in the HCP –Patient relationship

Gen Z / Millennials 46%

Gen X 31%

Baby Boomers 19%

"I struggle to attend in-person appointments with my doctor (*e.g. my doctor is too far away, or I struggle to get transport to my doctor*)"

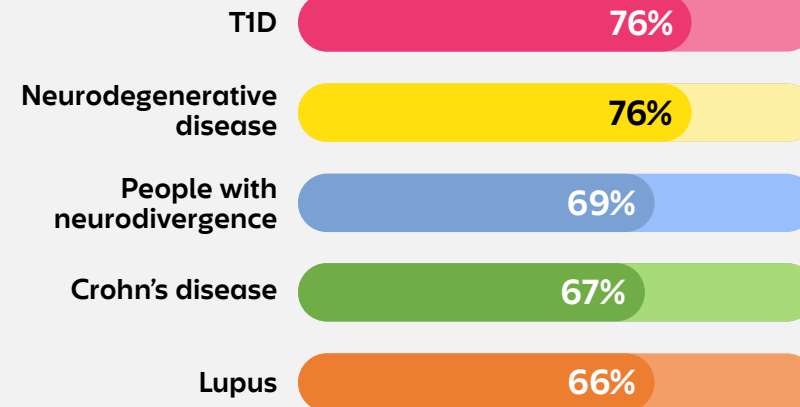**Gen Z / Millennials** 54%

Gen X 45%

Baby Boomers 31%
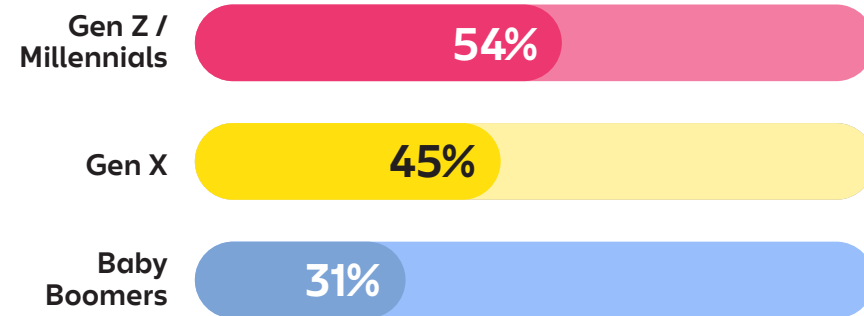
% of participants who reported that they sometimes feel frustrated when talking to a doctor because he/she doesn't have time to answer all of their questions.

Leading to patients feeling a lack of empathy

42%

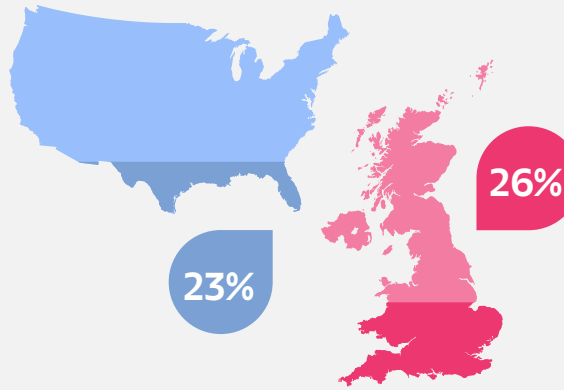% of participants reported that sometimes they feel that their doctor lacks empathy

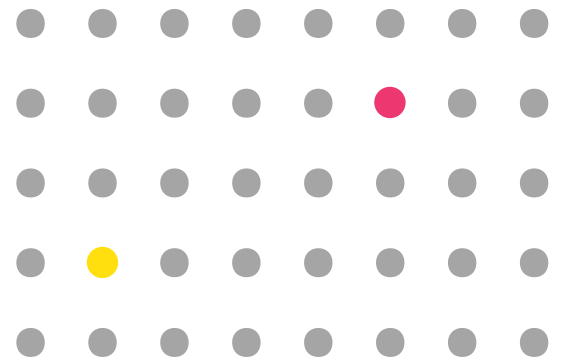|	
T1D	76%
Neurodegenerative disease	76%
People with neurodivergence	69%
Crohn's disease	67%
Lupus	66%

Or patients are struggling to be taken seriously

% of participants in the US / UK that have felt dismissed / not taken seriously by a medical professional when discussing their symptoms / experience in the past

23%

26%

Condition	Percentage
Fibromyalgia	53%
People with neurodivergent condition	47%
Lupus	42%
Neurodegenerative condition	41%
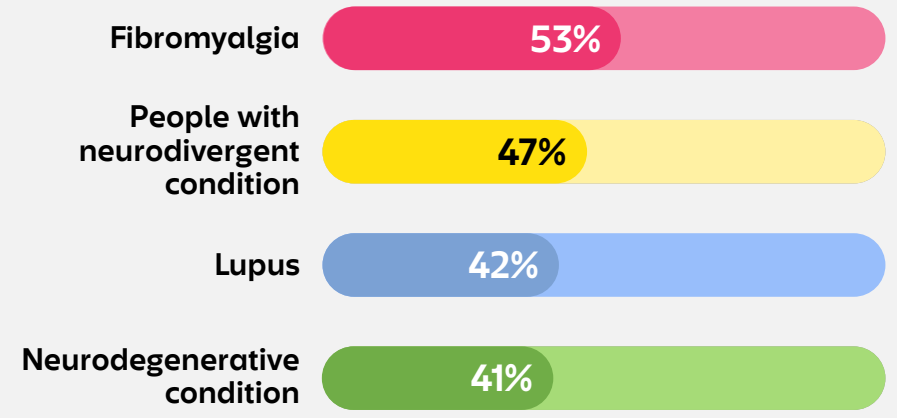
Inclusive Healthcare, by design

Challenges linked to health inequalities

Health inequalities have been the talk of the healthcare world over the last couple of years

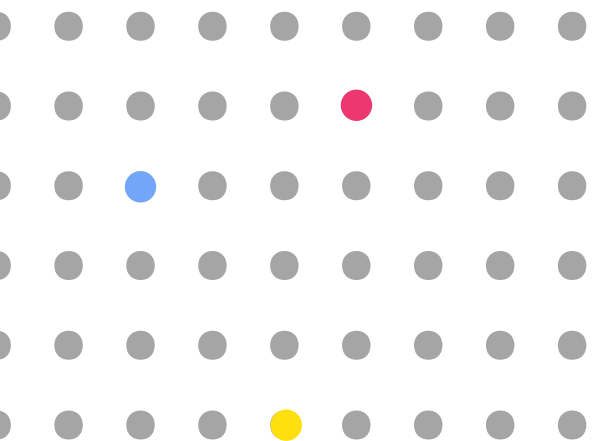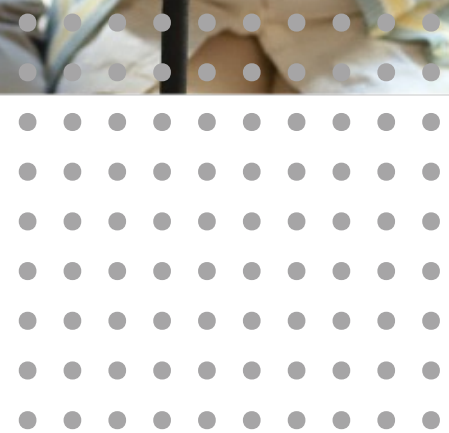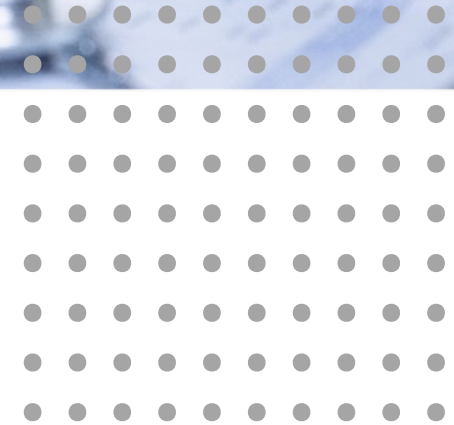# Multiple factors are limiting access to healthcare

Affordability

21% of US participants reported that they avoided seeing a doctor due to cost concern

14% in China too, especially students
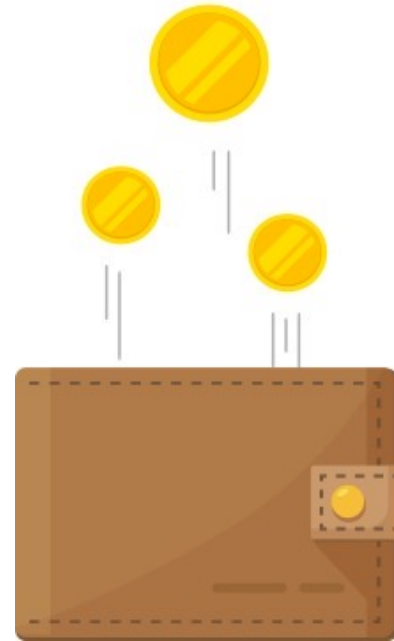
Language challenges also kick in

Language barriers come in multiple guises
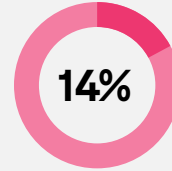
14% of US and Chinese participants reported a **language barrier** with a medical professional
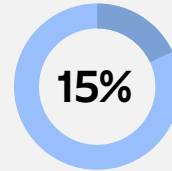
15% **struggled to understand** what a medical professional said **due to complicated medical language**

IBD patients	32%
Migraine sufferers	31%
Patient with neurodegenerative	25%
VS cancer	12%

Discrimination happens, but possibly for different reasons than expected
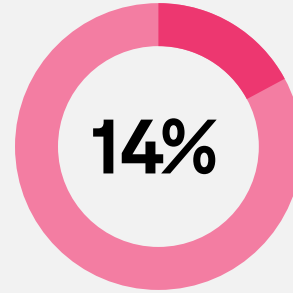
14% of participants reported that they felt discriminated against by a medical professional

due to **age, gender, ethnicity, sexual orientation, weight, mental health**…

Top 3 reasons for discrimination or dismissal:

Age	28%	esp. < 25yo or +75yo
Weight	25%	esp. for overweight and obese
Mental Health	23%	
Your Choices	23%	
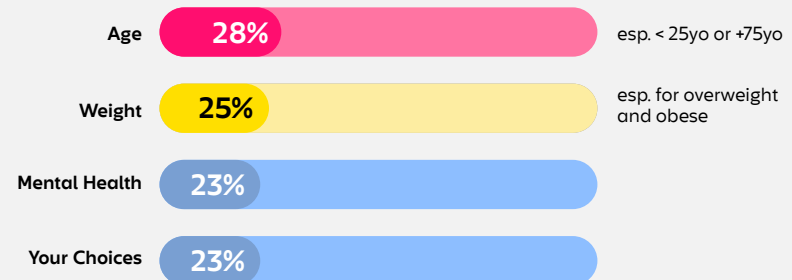
Truth-searching

Changing picture of
information seeking

Health information abounds in almost overwhelming amounts. The volume of channels is growing.

How is this changing?

Doctors remain the widest used information source

62%

of people living with chronic conditions ask for information regularly from their doctor

Followed by search engines (Dr Google), Health information websites, pharmacists and friends/family

But the picture is starting to change…

Of the 38% of people living with chronic conditions who do not see their doctor as a regular information source…
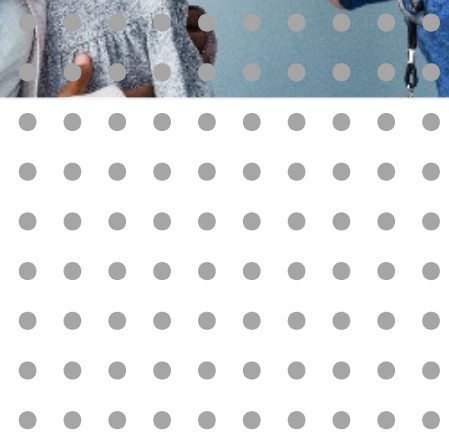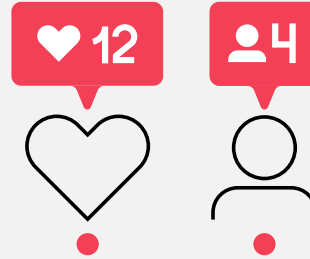
They are more likely to turn to online influencers & social media

Millennials least likely to see their doctor as a regular information source

People living with Autoimmune conditions and neurodivergence illnesses are less likely to see their doctor as a regular information source

They are more likely to be:

Employed (vs. retired, students, employed), Based in a city, Black / African American (US only)

There are clear generational differences in the use of social media

Generational differences in information formats are also seen

Gen Z

33%

Millennials

26%

Gen X

14%

Baby Boomers

5%

% using specific groups on social media to discuss an illness / situation

Top 3 social media platforms used by people seeking health information
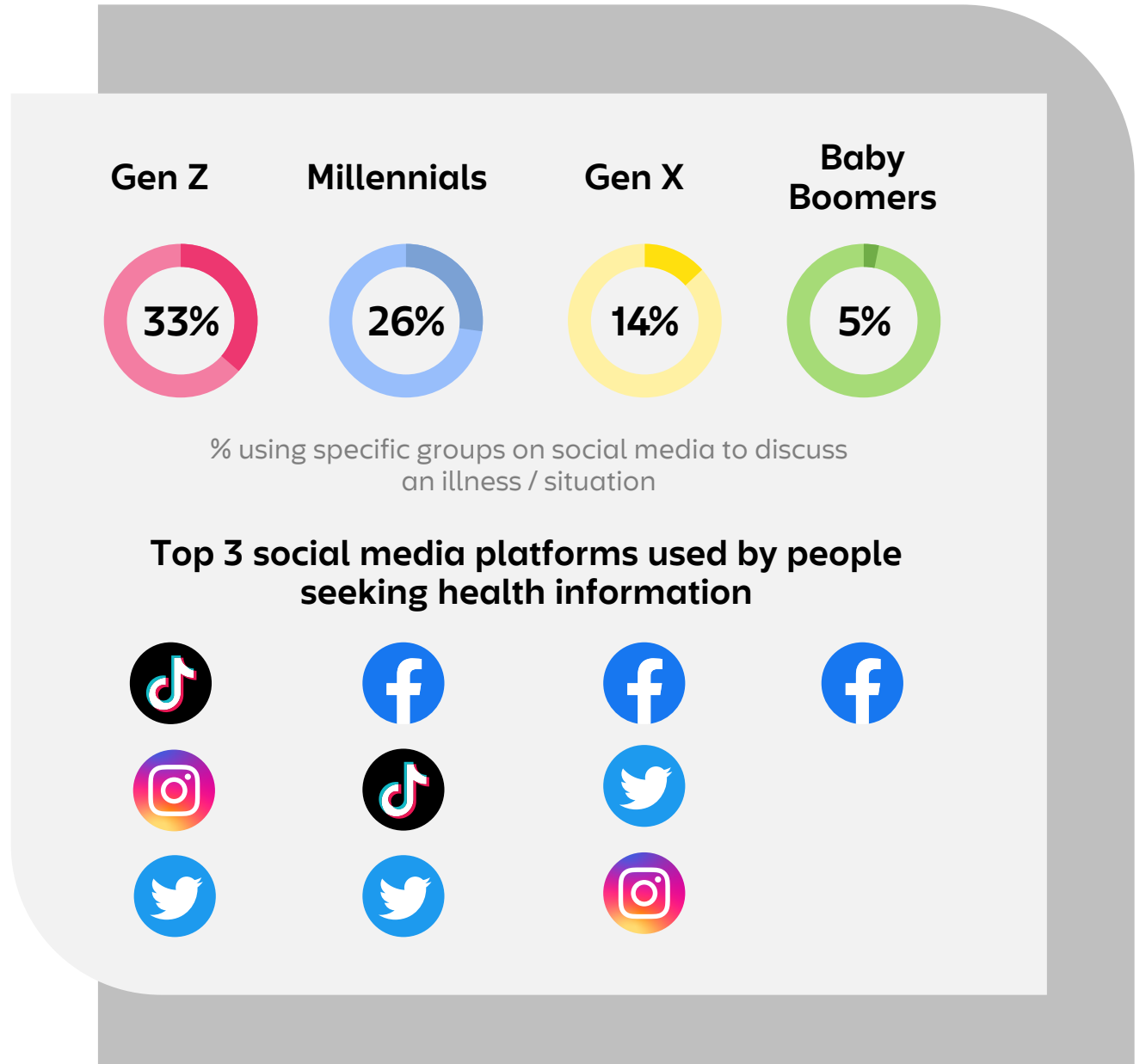
Online information sources have impact too, especially for younger generations

Gen Z / Millennials 50%
Gen X / Baby Boomers 31%

& of those **asked about symptoms / diagnoses** they have read about online

Gen Z / Millennials 31%
Gen X / Baby Boomers 15%

& of those **asked to be prescribed a treatment** they have read on a **medical website**

Gen Z / Millennials 19%
Gen X / Baby Boomers 8%

& of those **asked to be prescribed a treatment** they have heard about from **another patient / online influencer**
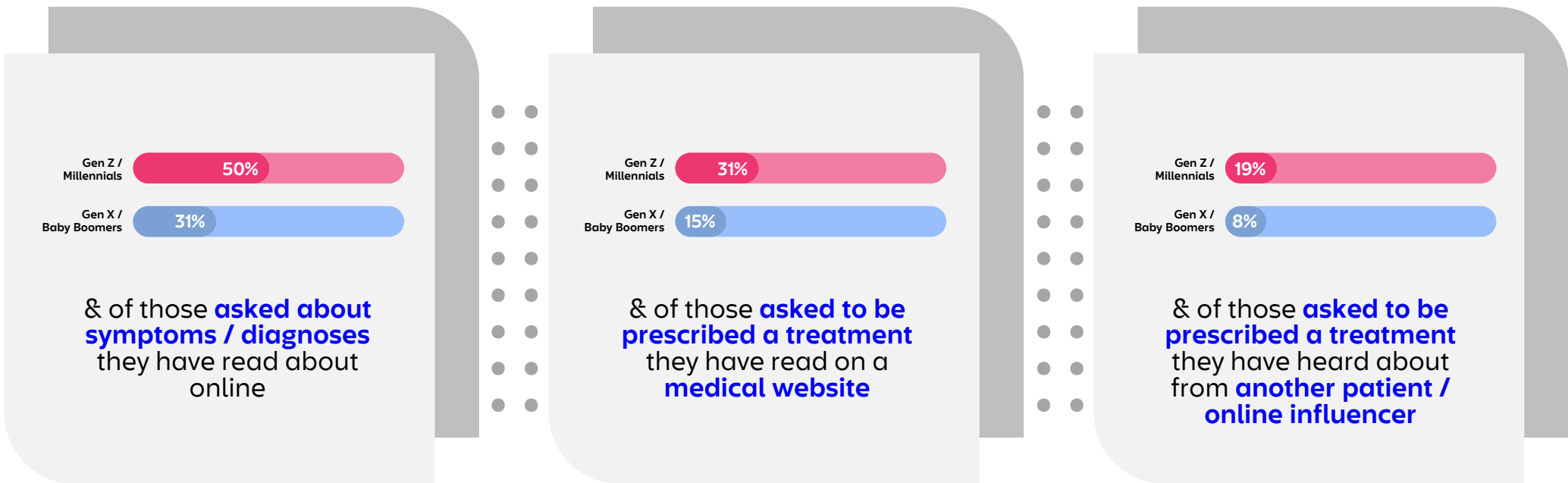
All is not well in the world of online health information

Even with **6.75 million google results** for treatment information on Crohn's disease in the UK alone
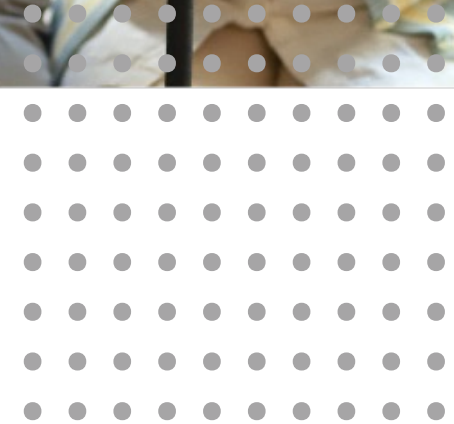
... And **68 apps** to support people living with Crohn's, based on a search of the Apple App Store

75%

of people living with Crohn's disease agreed that it is difficult to find reliable health information online

A similar picture is seen for other autoimmune conditions

From 'beyond the pill' to 'beyond the app'

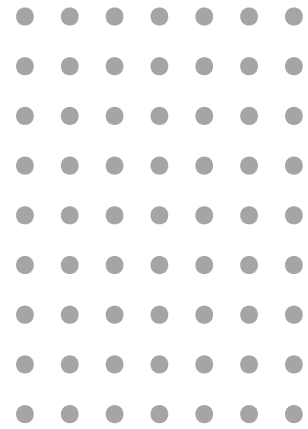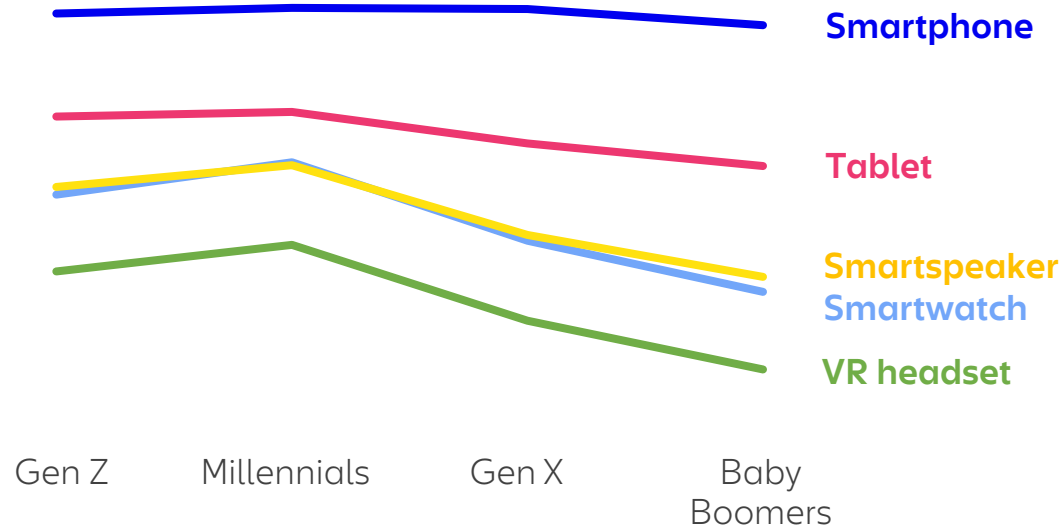## Multi-faceted digital health

There has been so much talk about 'beyond the pill' in pharma, and for almost a decade, the answer has been: let's do an app!

Could a more holistic view be more powerful?

Myth-debunking: "but older patients!..."

Ownership of devices across generations

Smartphone

Tablet

Smartspeaker
Smartwatch

VR headset

Gen Z   Millennials   Gen X   Baby Boomers

Voice-based and VR solutions

60% of people who own a smartspeaker say they use it several times per week or day for health purposes

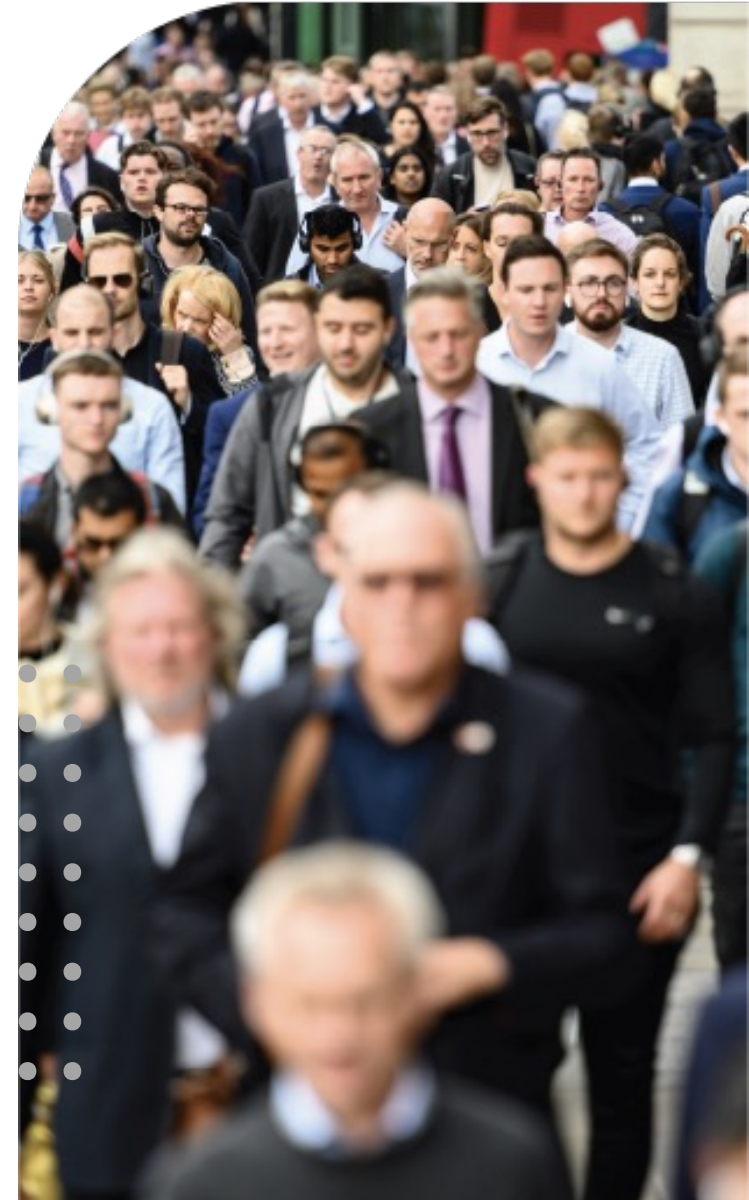**70%** of people who own a VR headset say they use it several times per week or day for health purposes

So much more
to explore...

Study details

Many lenses to look at patients' expectations

- **Socio-demographics: age, gender, income, country, ethnicity (US)**

- **Behaviors: information-seeking patterns, adoption of digital health**

- **Health conditions: 50+ health conditions**
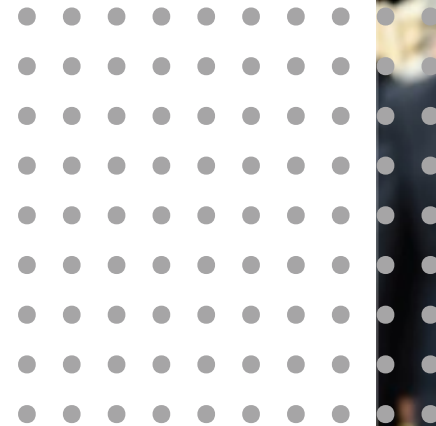
The patient sample is set up to be flexible, robust and scalable

20-minute online survey

- Nationally representative adult (aged 18+) samples to allow us to cut the data by diagnosis or demographic

- Plan to top-up by diagnosis, or add countries, as needed

3,000

3,000

1,500

1,500

1,500
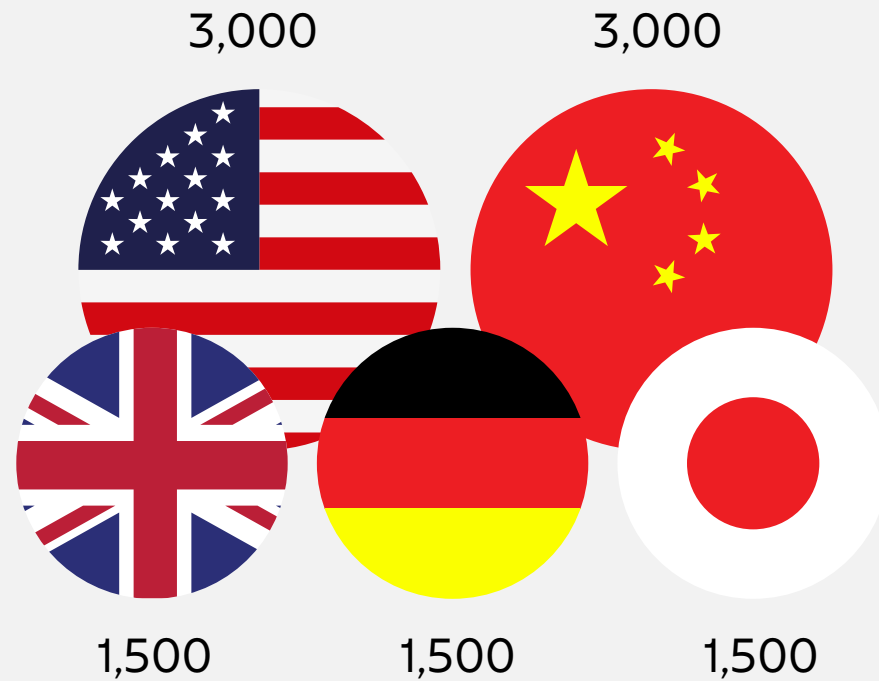
Robust sample sizes for many common diagnoses*

*These sample sizes are >100

We have samples of 50+ respondents for many cancers, IPF, cystic fibrosis, NCFBE, Lupus, psoriatic arthritis, HCV, pDNP, Dementia, fertility challenges, Endometriosis

- **GI**
  - Crohn's Disease
  - UC
  - IBS
  - GERD

- **CVD**
  - Hypertension
  - Chronic Heart Failure
  - Coronary Artery Disease

- **Chronic Pain**
  - Back Pain
  - OA
  - Post-surgical Pain
  - Fibromyalgia
  - Migraines

- **Mental Health**
  - Depression

- **Dermatology**
  - Atopic Dermatitis
  - Psoriasis
  - Chronic Urticaria
  - Vitiligo

- **Respiratory**
  - Asthma
  - COPD
  - Chronic Cough

- **Kidney & Liver**
  - Type 1 & 2 Diabetes
  - CKD
  - NASH

- **Autoimmune**
  - Rheumatoid Arthritis
  - Multiple Sclerosis

Exploring a wide range of topics

Health actions
Activation status
Health actions & expectations
Future health expectations
Mental health attitudes

Doctor-patient relationship
Patient's role in decisions
Expectations & experiences with doctors

Caregivers
Caregiver status & experiences
Role in health decisions

Information-seeking & influencers
Information sources & preferred communication formats
Key influencers

Digital health
Device ownership & usage for health
Use of health @ home services (e.g. telehealth)
Digital therapeutics
Interest towards AI & VR
Trust and data-sharing
Personalized healthcare

Vaccinations
Beliefs & actions

Demographics & diagnoses
Age, gender, region
Diagnoses, medical payment approach
Primary language spoken, ethnicity (US only)
Weight status, location, educational status, employment status, household

Tailor the Patient TrendScoping Study to your needs!

Want to design future-fit solutions with a clear understanding of how patient or caregivers expectations are changing? Need to challenge assumptions for your innovation agenda?

Patient TrendScoping is a study designed specifically to allow you to filter results by diagnoses, demographics, information-seeking patterns, or digital health adoption, so that you can have the data you need to move confidently with your strategic innovation agenda.

You can purchase a bespoke TrendScoping report as a cost-effective way to quickly understand the emerging needs and behaviours of a specific patient pool.

Of course, the magic doesn't stop there, and we're happy to accompany you to future-proof your strategy with in-depth trend analysis, innovation scan or scenario mapping.

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