

A background image showing a person from behind, looking out at a body of water with a boat's mast and rigging visible. The person has long, dark hair and is wearing a dark jacket. The scene is brightly lit, suggesting a sunny day.

In this era of patient centricity, do we really understand how patient needs are evolving?

Lucy Ireland, Partner, Hall & Partners

Agathe Acchiardo, ThinkNext



Lucy Ireland

Partner, Hall & Partners

With nearly 25 years experience in pharmaceutical market research, Lucy has followed the evolution of our primary research over the years!

Lucy is a multi-methodologist who is passionate about maintaining the value of our work in these changing times



Agathe Acchiardo

ThinkNext

Agathe has worked in the pharmaceutical industry for almost 10 years, before specialising in foresight and future trends

As a 'health futurist', she now runs *Think Next* to bridge the best of both worlds and develop a more forward-looking approach in the pharma world

What you need to know about...

Patients of the Future



Get ready for the next generation of patients!

Patient expectations & sources of information are changing, esp. across generations

It's key to understand the differences to address the needs of this new generation of patients...

To effectively **communicate, educate, or design** PSP for pediatric or young patients (eg asthma, T1D)

To **drive earlier diagnosis** at the onset of lifestyle driven disease (e.g T2D)

To **anticipate the needs & expectations** of patients *in the future* for drugs in development



A quantitative study of 10,500 adults

‘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.



Looking at 3 generational groups



GEN Z & MILLENNIALS

1982 - 2015

n=5,092

18-40 yo

Early onset of chronic conditions

Next-gen for products in development

Caregivers to others



GEN X

1965 - 1981

n=2,492

40-58 yo

Developing chronic conditions

Caregivers to others



BABY BOOMERS

1946 - 1964

n=3,179

58 yo – 78 yo

‘Typical’ chronic condition patient

Onset or next-gen for older age disease (e.g. Parkinson)

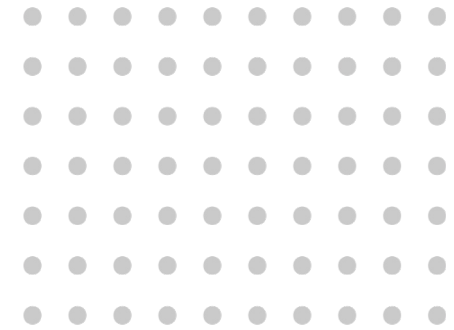
3 trends to explore

- Health on Demand
- People, Not Patients
- Health'fluencer



A quick word on trends

- Consumer-led, not tech-led
- Reflecting a change of behaviors, beliefs, expectations
- Developing over years (3-7 years)





Health on Demand

High expectations of services being available on demand in a convenient and frictionless way

In our busy lives, time is of the essence... and lack of time creates tension to access healthcare IRL settings

"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

46%

Gen X

31%

Baby Boomers

19%



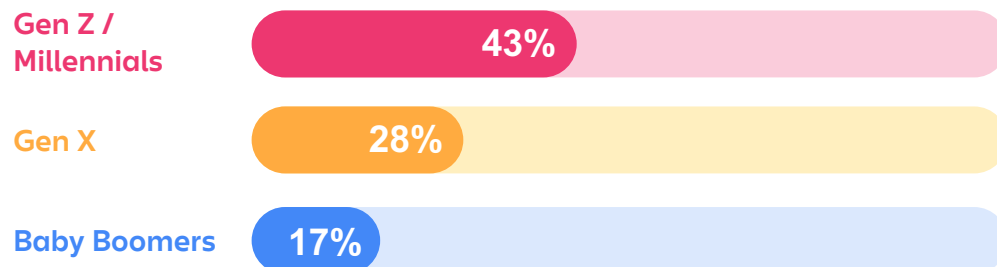
Generational element at play

Also different lifecycle (active workforce vs. retired, childcare...)

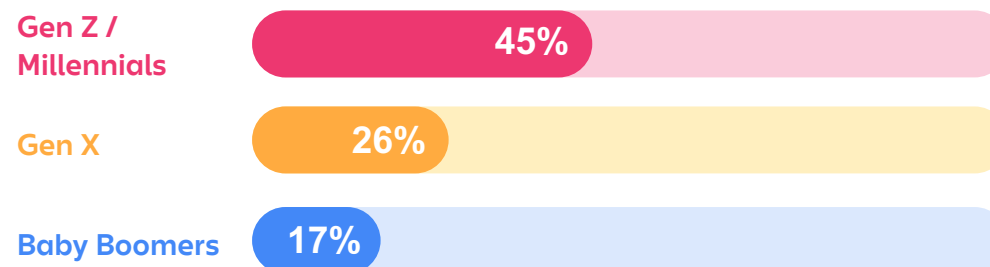
Not about physical distance – struggling more in cities than in rural/suburban settings

Younger generations happy to replace F2F time with digital solutions

"I have already used **a video consultation** with an HCP"



"I have already used an online consultation via **chat/messenger** with a human (e.g. a doctor, a nurse, a therapist) "



But for older generations, loss of F2F time is a barrier to digital adoption

#1 reason for NOT using a Digital therapeutics

Gen Z / Millennials

38%

Concerns on
data privacy

Gen X

37%

Concerns on
data privacy

Baby Boomers

40%

Replacing F2F
time with HCP



Younger generations are more comfortable with the digital health world



64%

vs

38%



**of GenZ /
Millennials**

**of Baby
Boomers**

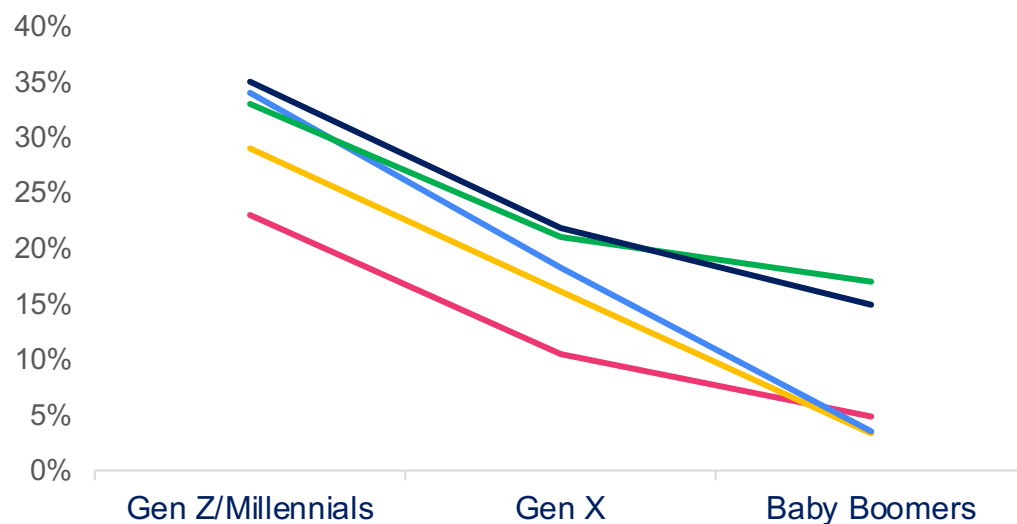
have a greater trust in a doctor working with the assistance of an AI diagnosis tool vs a doctor relying only on his/her judgement



Every-day use of digital devices highest amongst Millennials and lowest amongst Baby Boomers

Ownership of connected devices across generations

% of population (with relevant diagnosis)



A connected pulse oximeter

A connected blood pressure cuff

A connected injector or 'smart injection pen'

A connected or 'smart' inhaler

A connected stethoscope



Trend implications

- Support HCP and HCS to reimagine how they deliver care via revisiting patient journeys with the younger generation in mind
- Not one-size-fit-all but tailored touchpoints with generational differences in mind
- Understand which patients will place greater value in digital tools



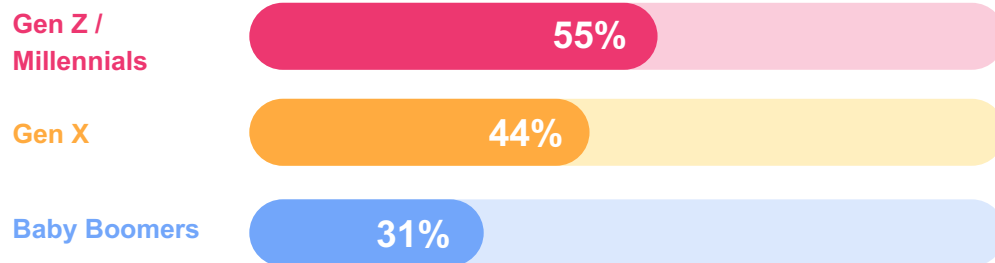
People not Patients

Evolving Gen Z / Millennial expectations towards HCPs

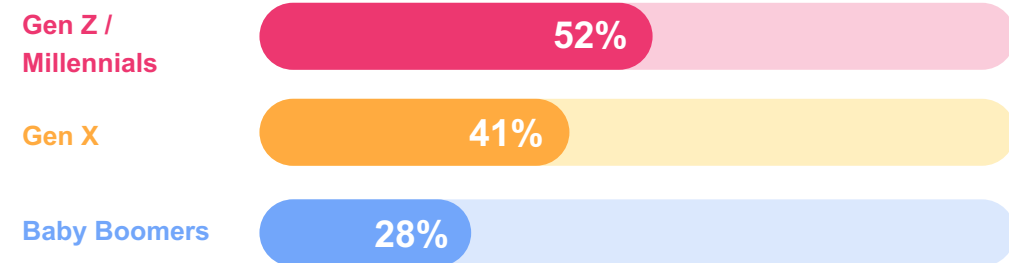


Challenges around quality of interactions with HCPs

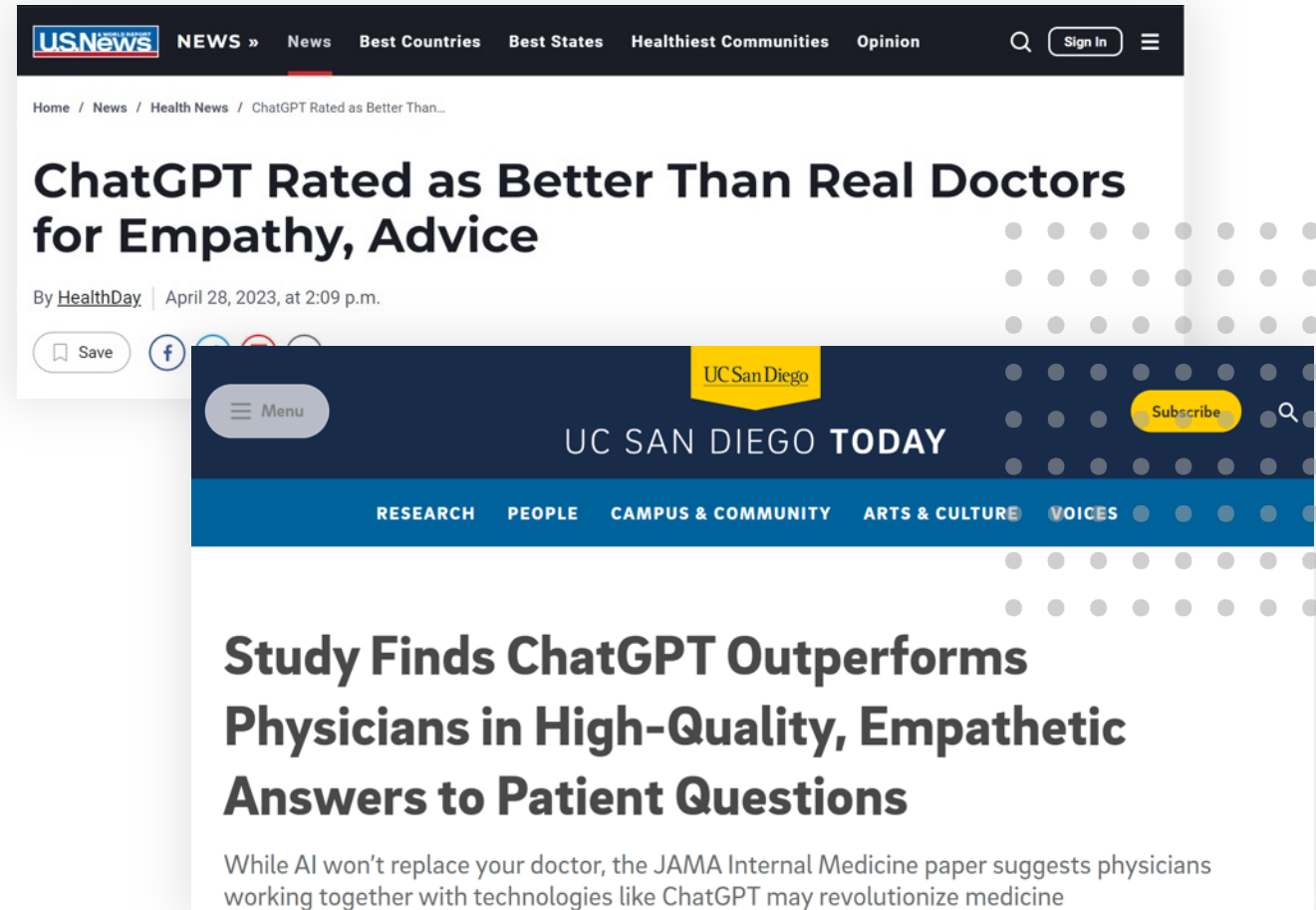
% who sometimes **feel frustrated** when talking to a doctor because he/she doesn't have time to answer all questions



% who sometimes **feel like the doctor lacks empathy**

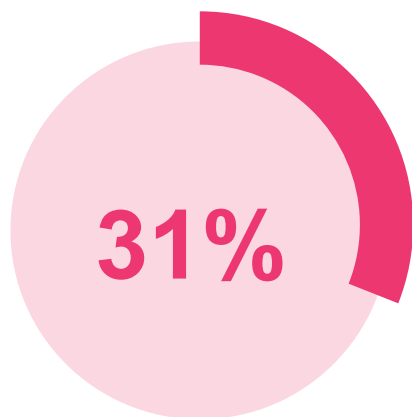


And now media stories could case further challenges

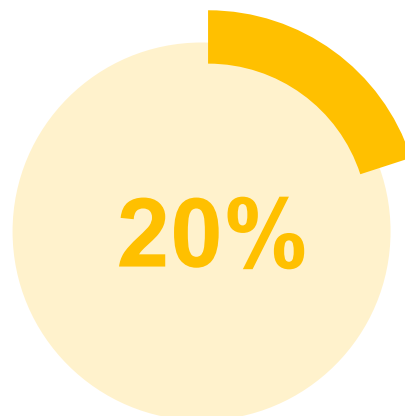


With new generations formulating 'demands' – often ill-tolerated by HCPs

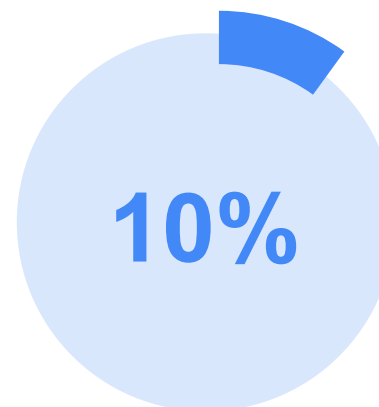
Gen Z/Millennials



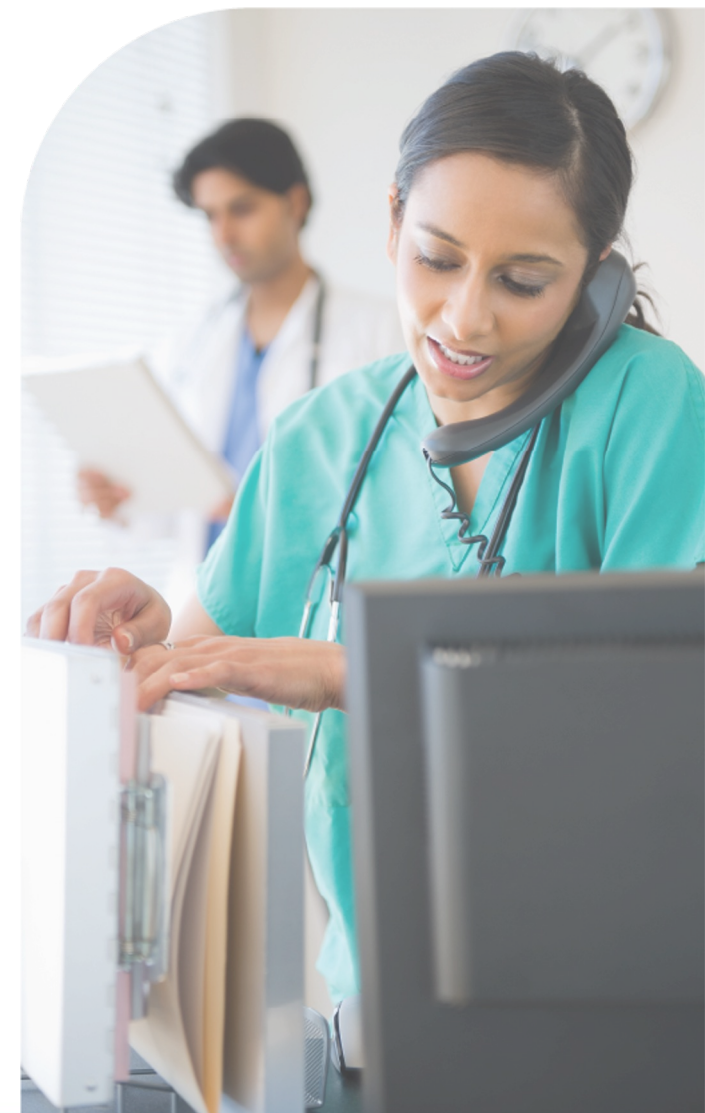
Gen X



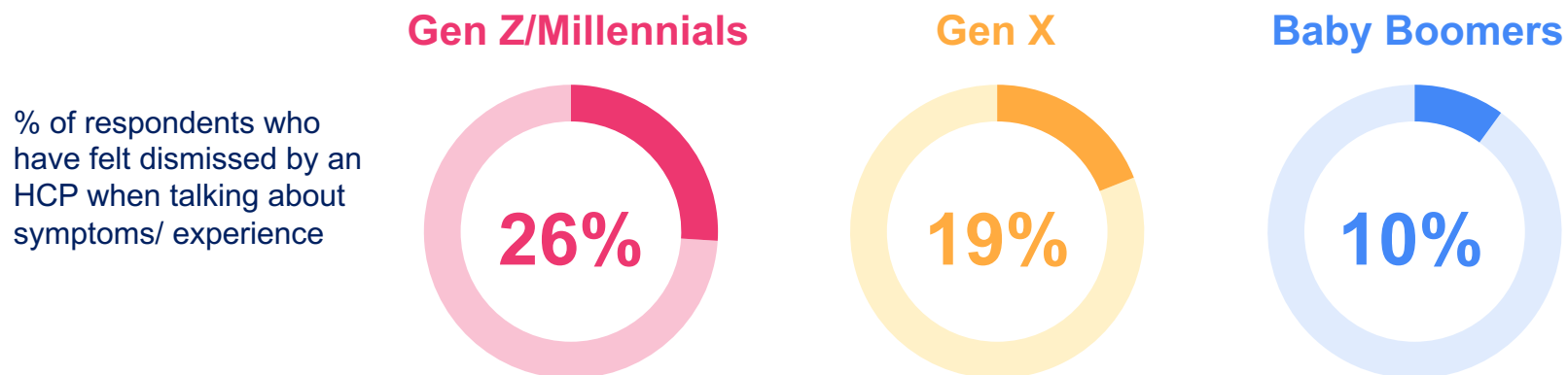
Baby Boomers



... say they have **asked their doctor to prescribe** a specific medicine or treatment
they have read about on a medical website



We see the emergence of the term 'medical gaslighting' as patients don't feel listened to



#1 assumed reason for dismissal or discrimination by HCP

Age
27%

Weight
26%

Age
36%



As part of a more empathetic approach, mental health impact needs to be a focus



39%

of participants struggle with the mental health aspects of their chronic condition



GEN Z & MILLENNIALS

55%



GEN X

40%



BABY BOOMERS

16%

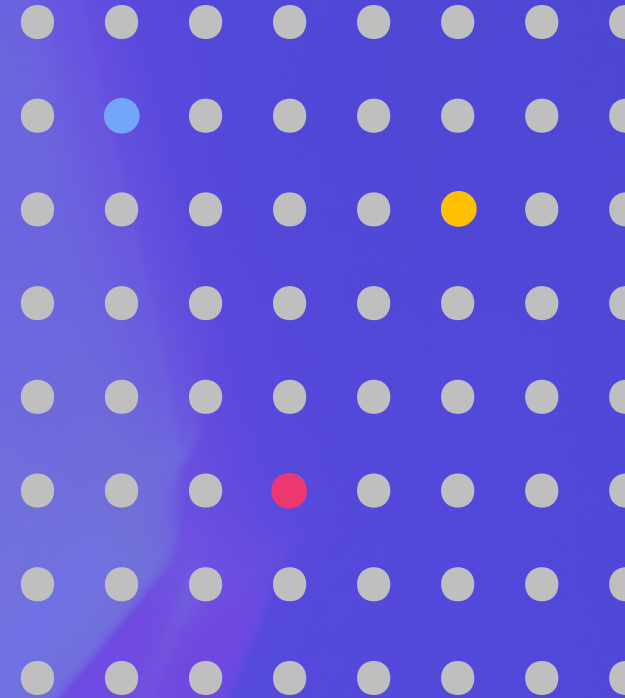
Trend implications

- HCPs need support in navigating these changing dynamics and expectations
- Consider patient-focussed end points (QoL, mental health) in drug development
- Empathy is important in patient (&caregiver!) communication materials



Health‘influencers

New behaviors in seeking health information



Recognition of areas of expertise

Younger generations are expecting a 'reframing' around expertise & experience

Don't confuse your Google search with my 6 years of medical school

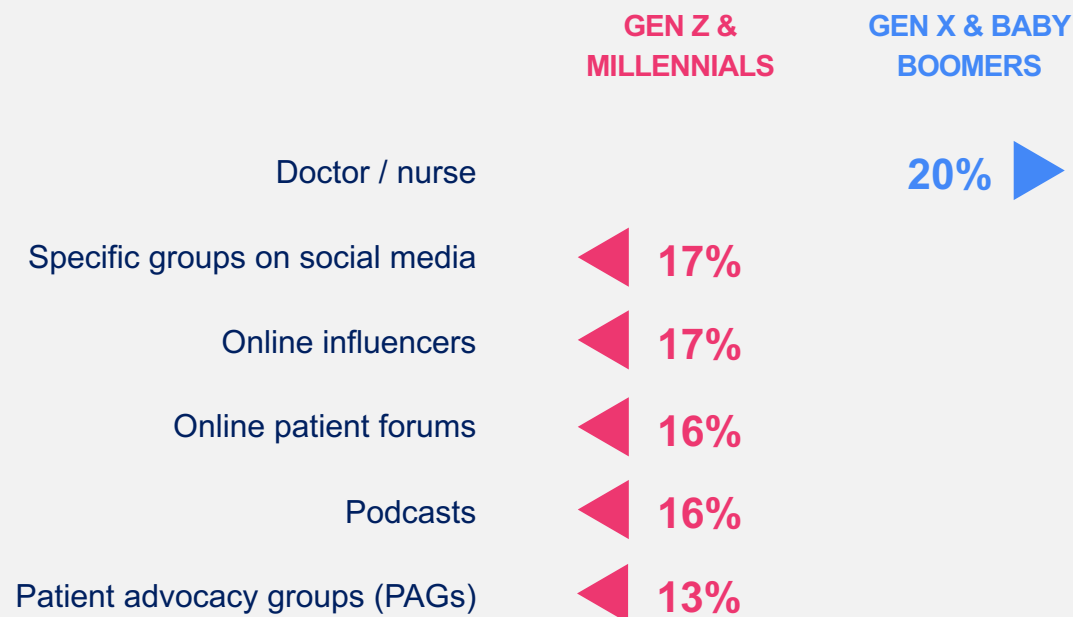
Don't confuse the one hour lecture you had on my condition with my 20 years of living with it



Younger generations are turning to online influences

Information sources used

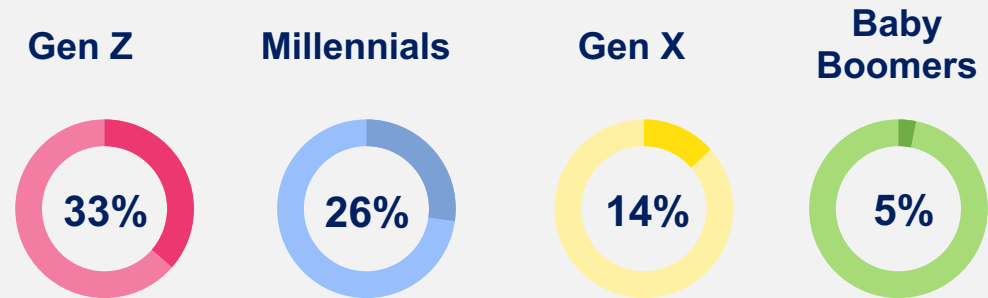
Difference in % of Gen X/Baby boomers vs. Gen X/ Millennials using each source



Generational difference in % of participants who reported that they use the **following information sources regularly to learn about their chronic condition(s)**

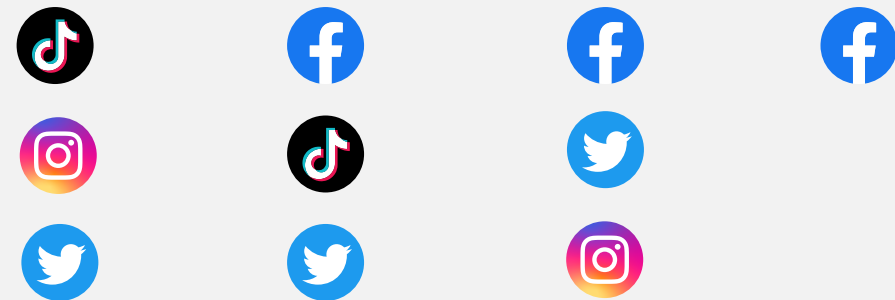
There are clear generational differences in the use of social media

Generational differences in information formats are also seen



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

Top 3 social media platforms used by people seeking health information



**Interestingly the differences
in information format
preferences may not be as
stark as expected**

The written word is critical

The younger generation also turn to
discussions with patients on social media far
more vs. older generations

Top 3 preferred information formats



GEN Z & MILLENNIALS



Website



Video



Leaflet/
instructions



GEN X



Website



Leaflet/
instructions



Text/ emails with
useful links



BABY BOOMERS



Leaflet/
instructions



Website



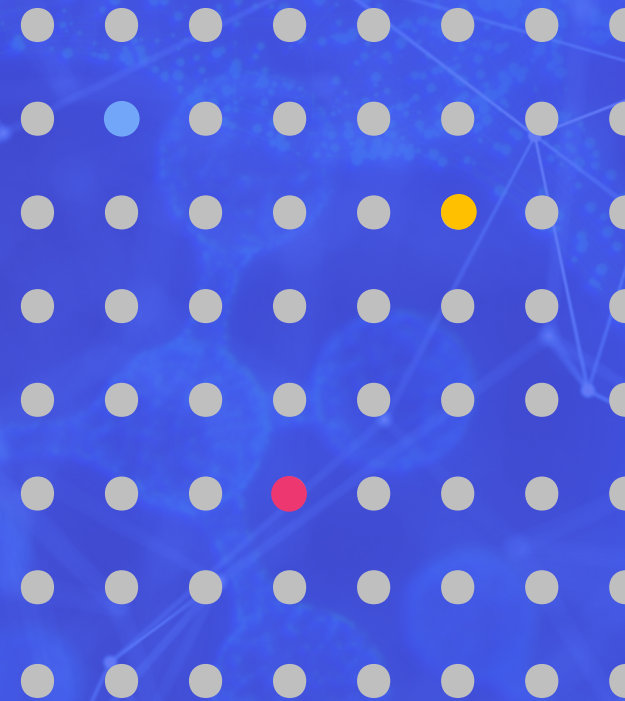
Text/ emails with
useful links

Trend implications

- Supporting patients with 'life advice' rather than medical information
- Information channels not only different per disease area, but first and foremost by age/generations
- Critical for paediatric / young adult audience: the patient influencer on social media



Key takeaways



For therapy areas with multiple age groups, you need to...

- Stop just dividing patients by clinical type and see the real people and their wider needs
- Think beyond the science, to offer empathetic, 'human' support
- Develop communications strategies for the different generations of patients
- In R&D phase, think of your product in the context of the 'patient of tomorrow'



For Gen Z & Millennials (<40 year olds), you need to...

- Engage with patient influencers – particularly on TikTok – and online communities
- Use a mix of online text (websites) and video education materials
- Take a 'digital health' first approach to support their need for convenience and maximise access to healthcare
- Keep pace with their expectations on empathy



For Gen X & Baby Boomers (<40 year olds), you need to...

- Use their physicians as the primary influencers of their health decisions
- Still provide text (websites & leaflets) education materials with any video content
- Don't dismiss them as 'non-digital', but target digital health tools for these life stages & specific support needs
- Position health-at-home solutions as a complement, not a replacement of F2F care



Thank you!

For more details, please contact us!

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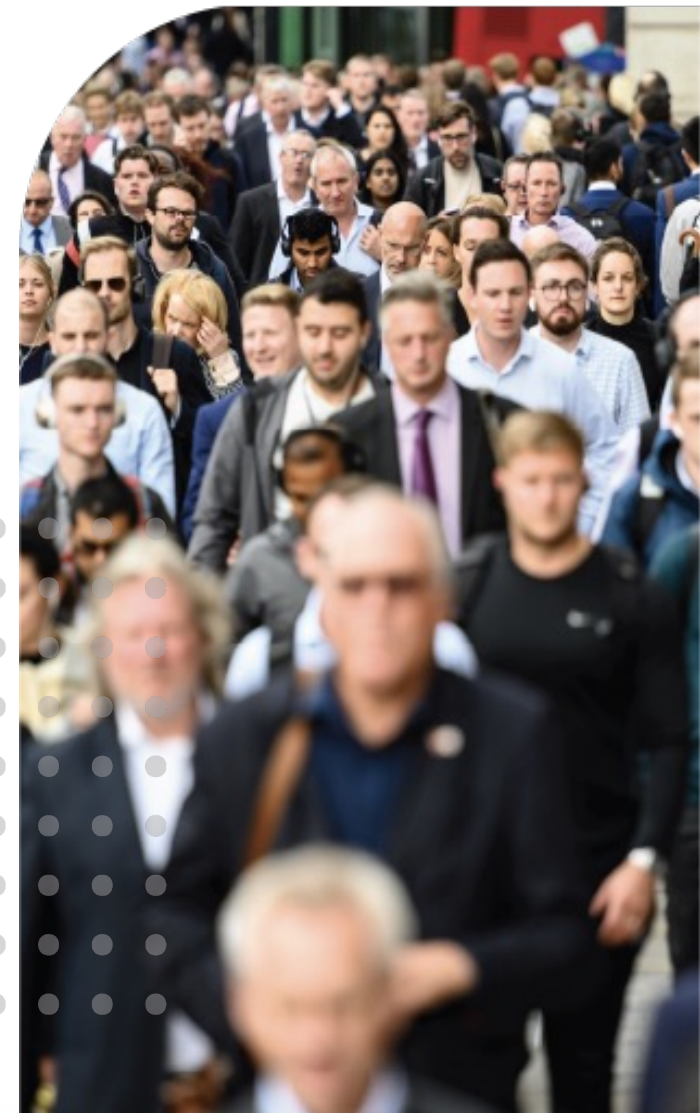
Back ups

Study details



Many lenses to look at patients' expectations

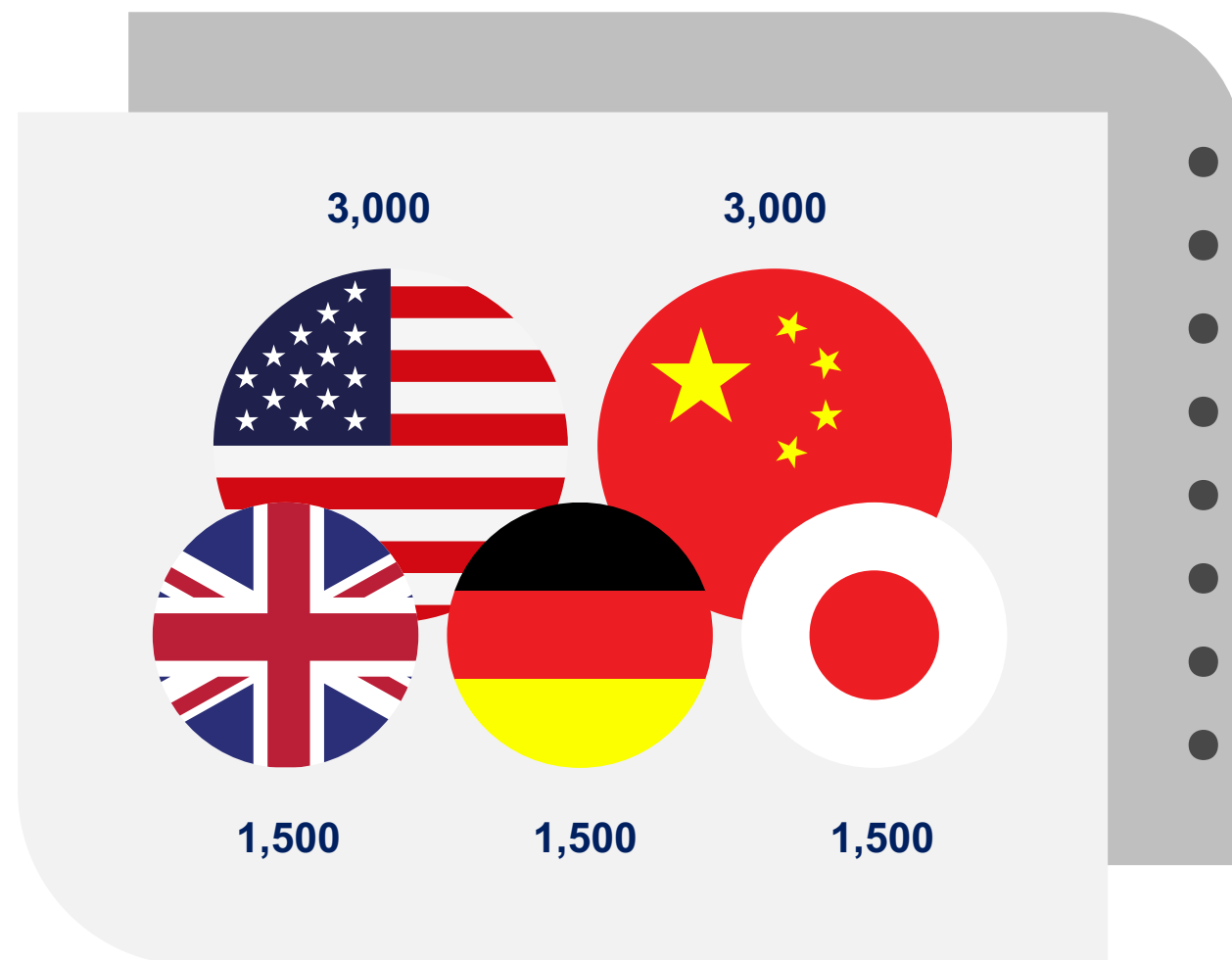
- Socio-demographics: age, gender, income, country, ethnicity (US)
- Behaviors: information-seeking patterns, adoption of digital health
- Health conditions: 50+ health conditions



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



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

