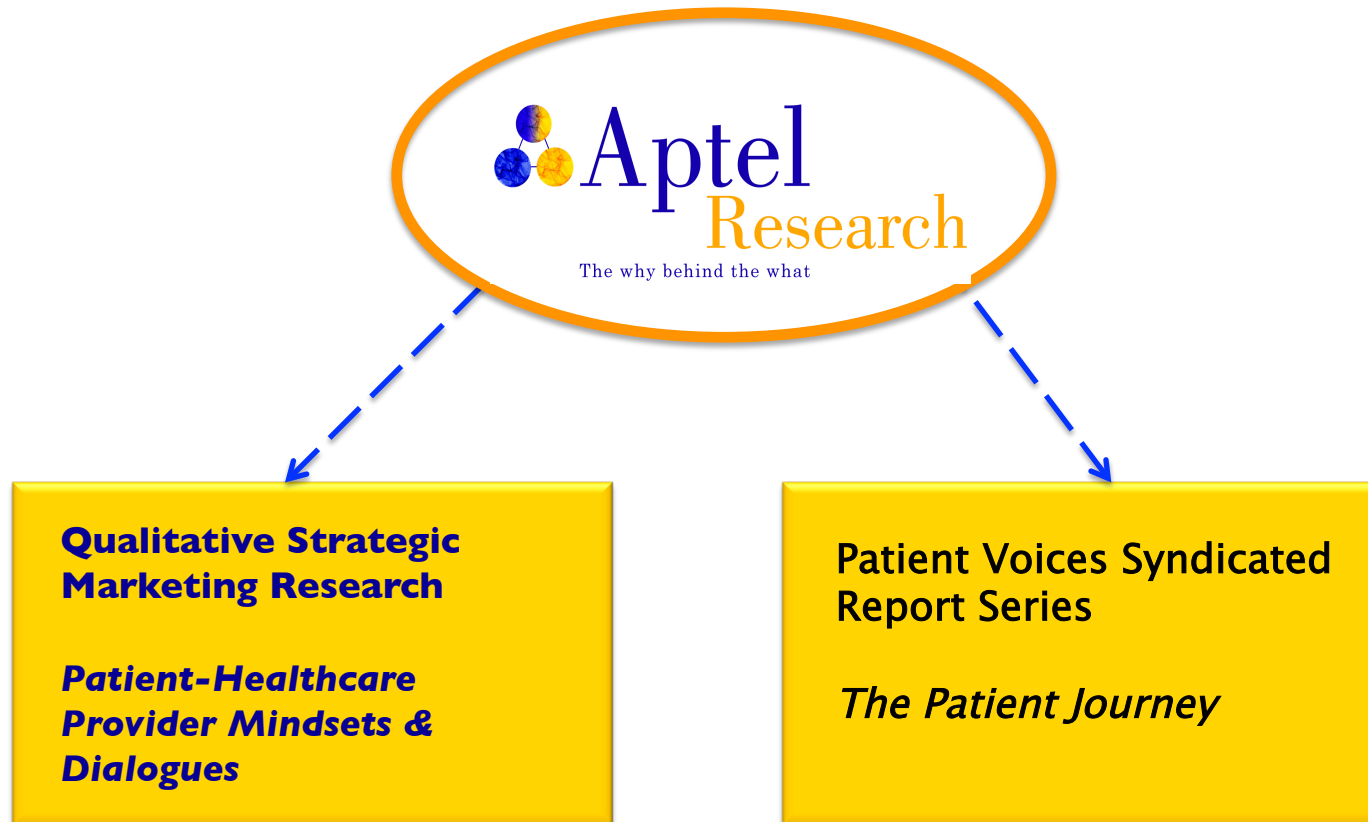


Areas of Focus

- A global strategic specialty marketing research and consulting company for the life sciences industry.







Patient Empowerment

Impact on Patients' Treatment Experiences

- **What is the Definition of Patient Empowerment?**
- **Why is Patient Empowerment a Hot Topic?**
- **What does Patient Empowerment Take?**
- **What Does it Mean for Healthcare Companies?**
- **Examples of Impact on Patient Treatment Experiences from Patient Voices® Syndicated Reports: MS and RA**
- **Questions**



Patient Empowerment: Definition

Patient power over a range of decisions such as provider and treatment choices



Patient Empowerment: Larger Scope

- **Patients can also contribute to defining national policies**
 - ✓ Health priorities
 - ✓ Goals
 - ✓ Standards
 - ✓ Programs
 - ✓ Resources and Monitoring



Why is Patient Empowerment a Hot Topic?

- **Changing Medical Landscape:** Chronic rather than acute diseases
- **Changing Information Landscape:** Availability of information (internet, patient forums/communities, blogs)
- **Advances in Technology:** Monitoring devices, genetic testing
- **Changing Provider Landscape:** Decreasing number of healthcare providers
- **AND.....\$ OF HEATHCARE**

Why is Patient Empowerment a Hot Topic?

EMPOWERED PATIENT



***BETTER QUALITY OF LIFE
BASED ON PATIENT'S NEEDS, SITUATION AND
VALUE SYSTEM***

MAXIMIZATION OF COST/BENEFIT











What Does Empowerment Take?

In Order for Patients to be Empowered, Their Role is Being Redefined



- **Assume greater responsibility**
- **Different patient-physician relationship**

Different Patient-Physician Relationships

Disease Management Milestones / HCP role	<i>Problem Detection (sign and symptoms)</i>	<i>Diagnosis and prognosis</i>	<i>Define health goals/ Generate treatment Options</i>	<i>Implement treatment</i>	<i>Monitor and evaluate</i>	
NONE						
Partner						
Expert						
God						

What Does It Mean For Pharma?



- **PATIENT CENTRICITY**

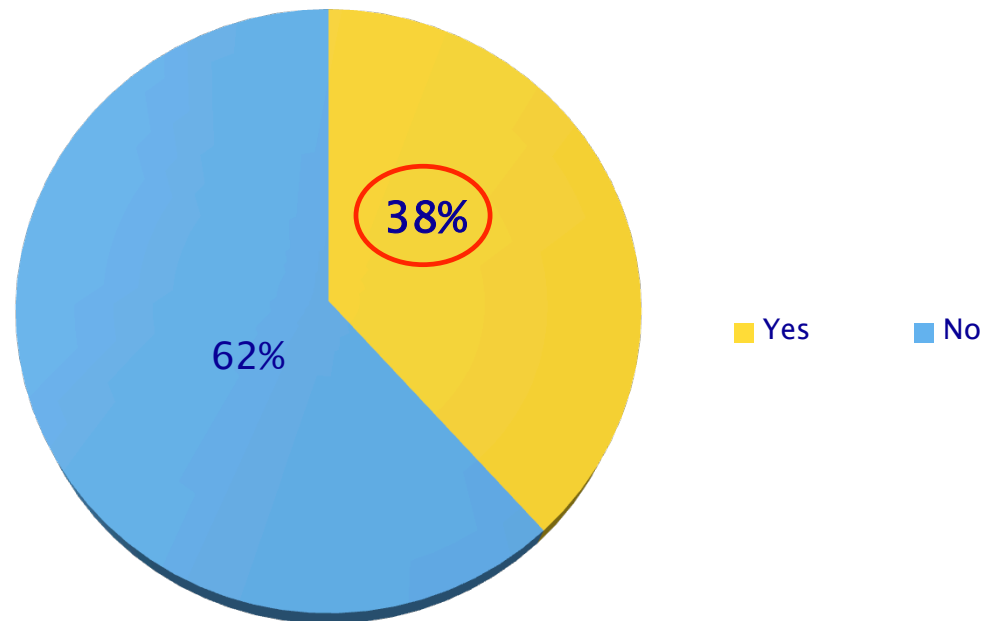


Examples from Patient Voices® Syndicated Reports

- **Specialty Chronic Diseases**
- **Methodology**
 - ✓ Qualitative interviews
 - ✓ Quantitative surveys
 - ✓ Analysis of patient social media

Request/Ask About Current Medication

(n=196)



Negative Feelings

- **Uncertain about the Future**
 - ✓ 31% non-Requesters vs 11% Requesters
- **Tired**
 - ✓ 9% Requesters vs 1% non-Requesters
 - ✓ Hopeless 9% vs 0% Requesters

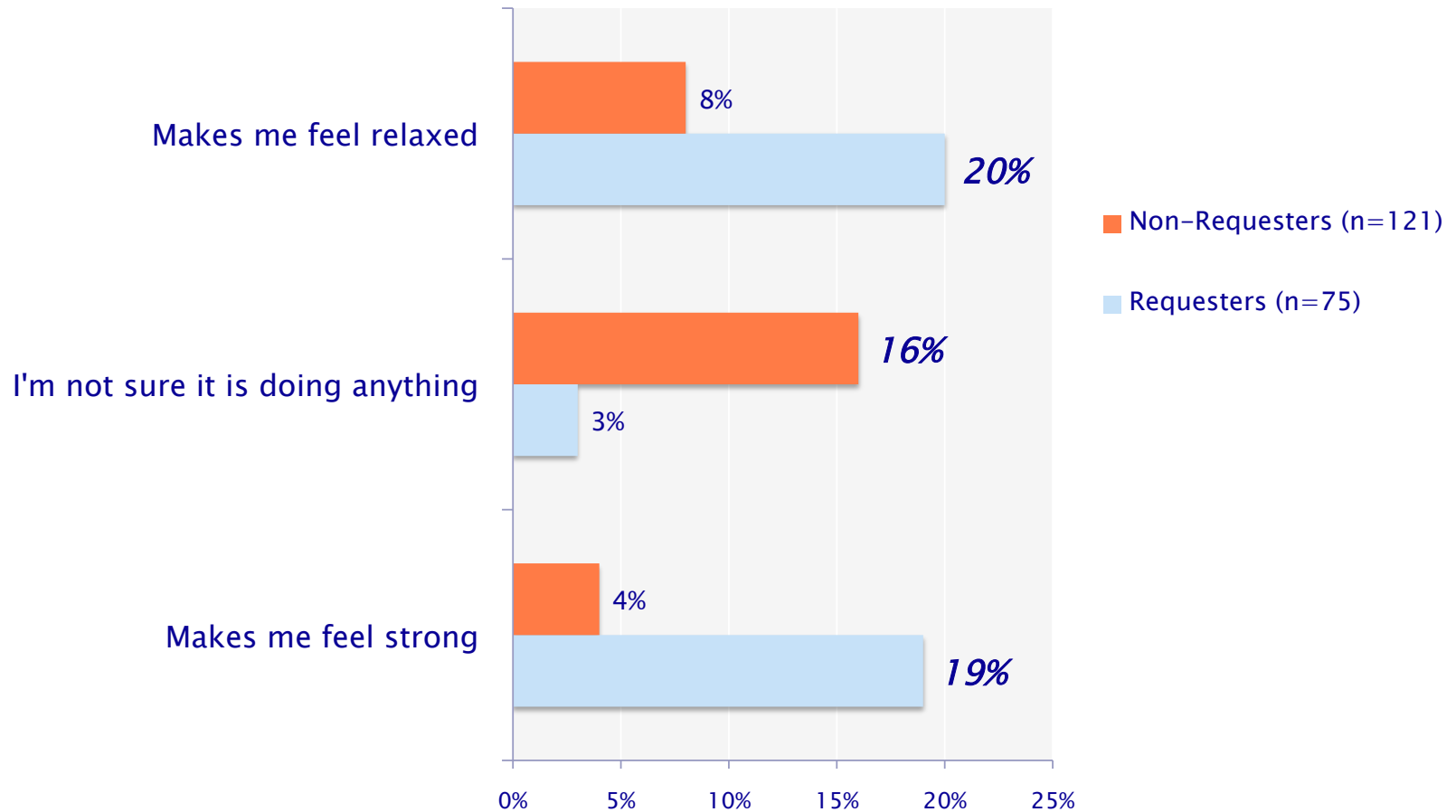
Positive Feelings

- **Confident**
 - ✓ 32% Requesters vs 12% non-Requesters
- **In Control**
 - ✓ 28% Requesters vs 9% non-Requesters
- **Satisfied**
 - ✓ 21% Requesters vs 8% non-Requesters

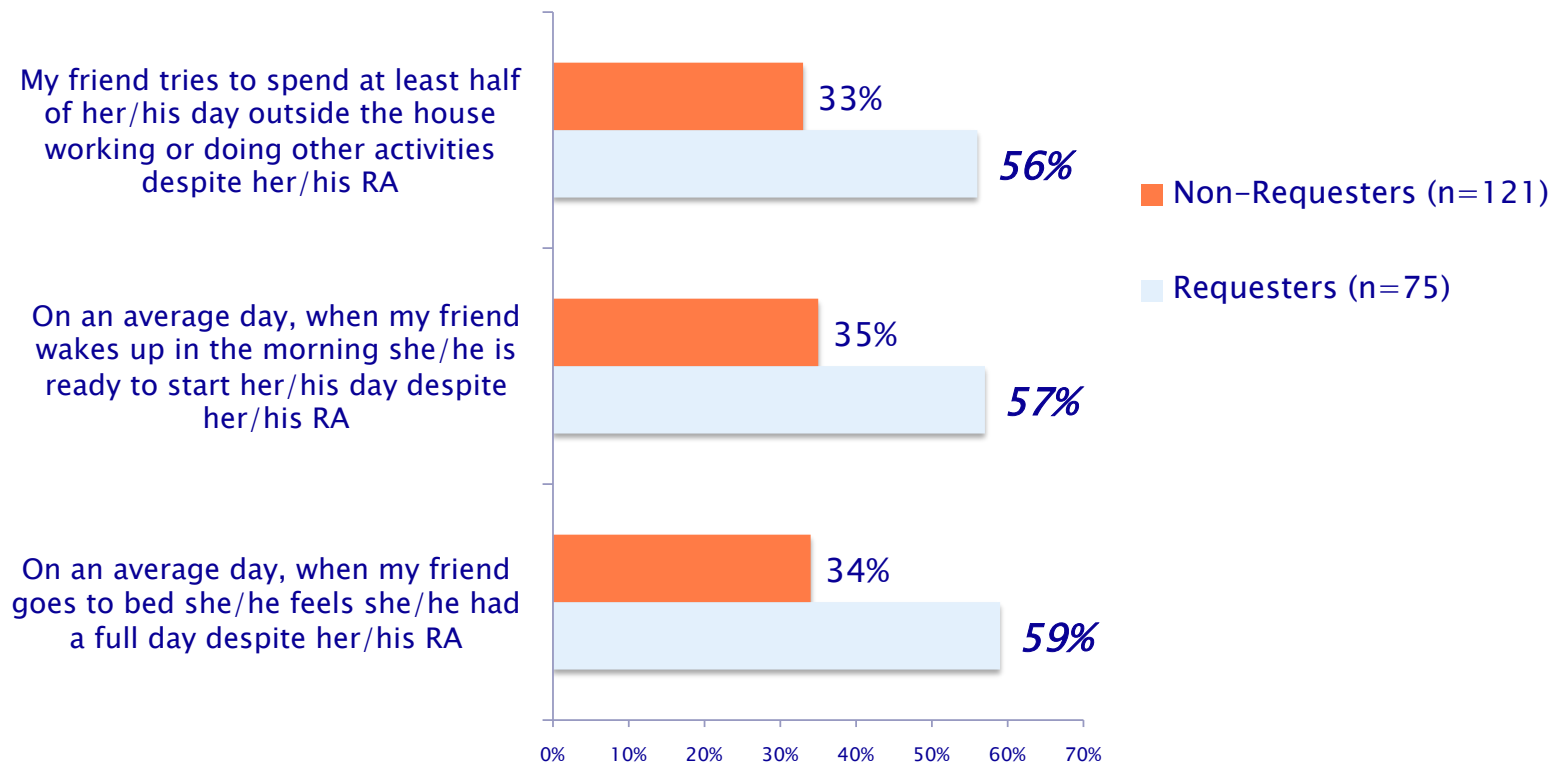
In their own words...

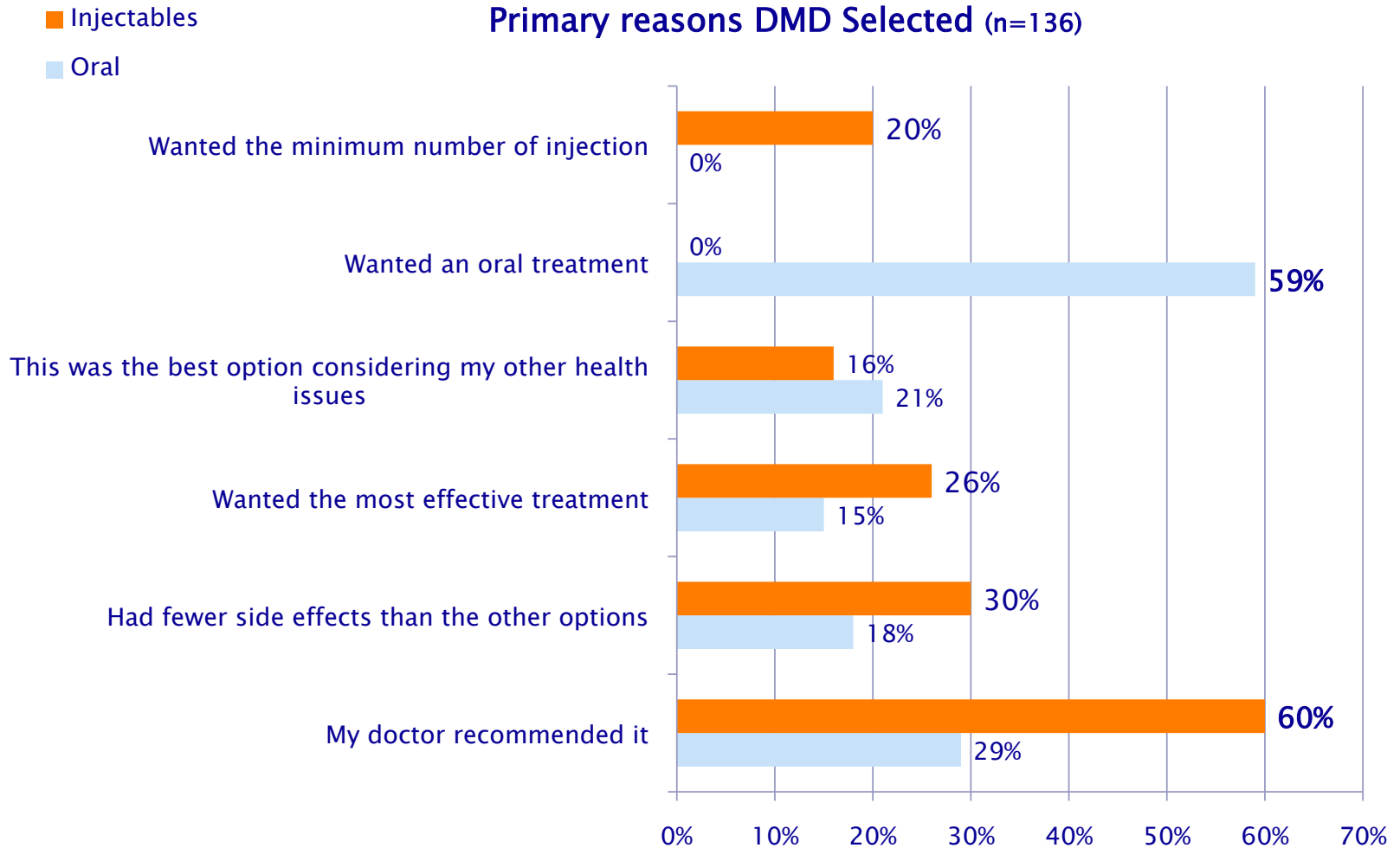
“When I started on Enbrel, I knew that I would be ok, and that it was the right therapy for me”

Most important thing Current Biologic does

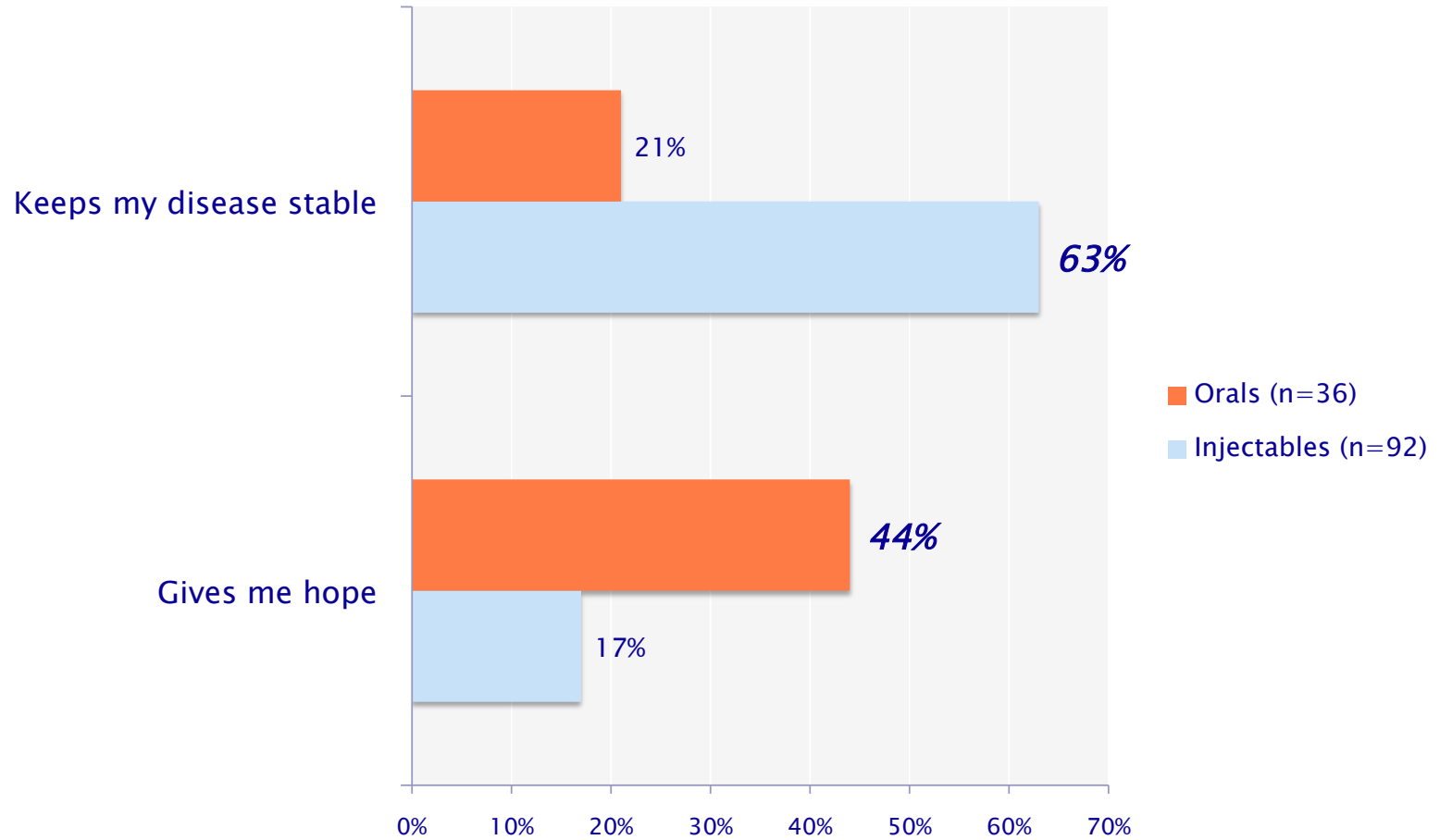


Attitude Towards Days-to-Day Living (% agree/strongly agree)





Most important thing DMD does



- **Patient's engagement in their treatment selection positively impacts their treatment experience**
- **Patient's engagement in their treatment selection positively impacts their attitude and perception towards their disease and treatment**



- **Importance for pharma to reach patient audiences with the most relevant messages in order to engage them in treatment decision**



Questions



Thank You!