

THE RISE OF SELF CARE

How the empowered patient and consumer will drive the future of health

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Agenda



What are the stand-out examples of self care technology in use today?



How will self care impact the doctor-patient interaction?



How will this movement disrupt OTC and Rx decision making?



What are the predictions for the future of health?

The rising role of technology in health



Drivers & enablers of digital health:

- Covid-19
- Adoption & implementation of AI
- Changing demographics
- Increasing patient/consumer empowerment
- Larger patient populations with long term conditions
- Stretched healthcare budgets



Global Trends 2021– Health remains top of mind



<https://www.ipsos.com/ipsos-mori/en-uk/ipsos-global-trends-2021-report-aftershocks-and-continuity>

Healthcare challenges

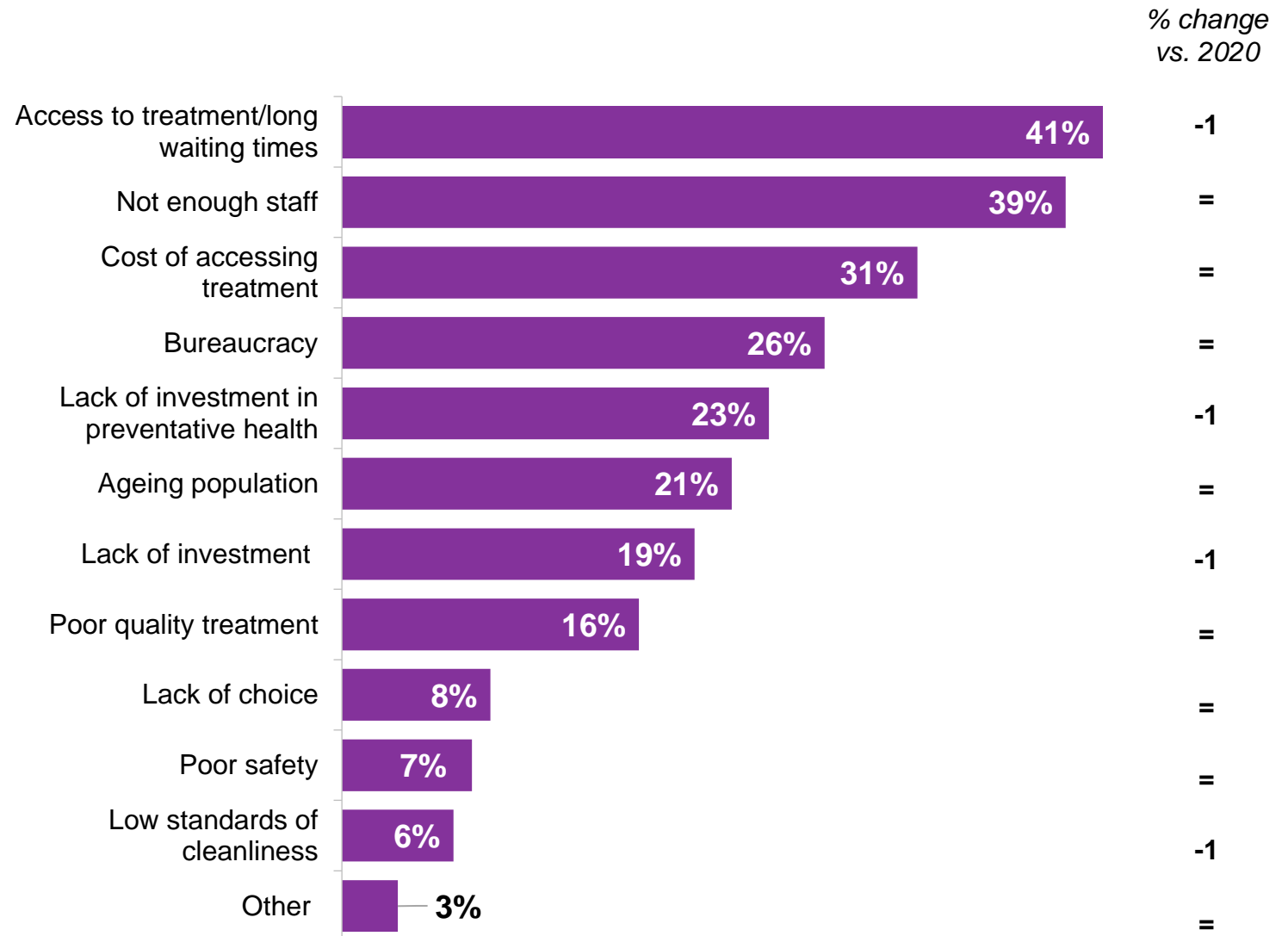
Overall, which of the following, if any, do you see as the biggest problems facing the healthcare system in your country?

Global country average

Access to treatment and waiting times emerge as the main problems that people around the world think their country's healthcare system faces – on average four in 10 select these.

Cost of accessing treatment is the third most selected issue globally (31%).

While no country has bureaucracy as their top healthcare challenge, it is widely recognised as a top 3 issue.



Base: 21,513 online adults in 30 countries, August 20th – September 3rd 2021.

Online samples in Brazil, Chile, mainland China, Colombia, India, Malaysia, Mexico, Peru, Romania, Russia, Saudi Arabia, Singapore, South Africa, and Turkey tend to be more urban, educated, and/or affluent than the general population.

The "Global Country Average" reflects the average result for all the countries where the survey was conducted.

Self care definition



**World Health
Organization**

“

“The ability of individuals, families and communities to promote health, prevent disease, maintain health, and to cope with illness and disability with or without the support of a healthcare provider”

– **World Health Organisation**



Consumers want care partners, not just care providers



80% of patients are ready for the use of technology for the management of their care¹

“Meet me where I am.”

Trends driving the future of health:

- Patient generated data
- Shared decision making
- Self-directed care
- Dynamic interconnectedness
- Supportive networks

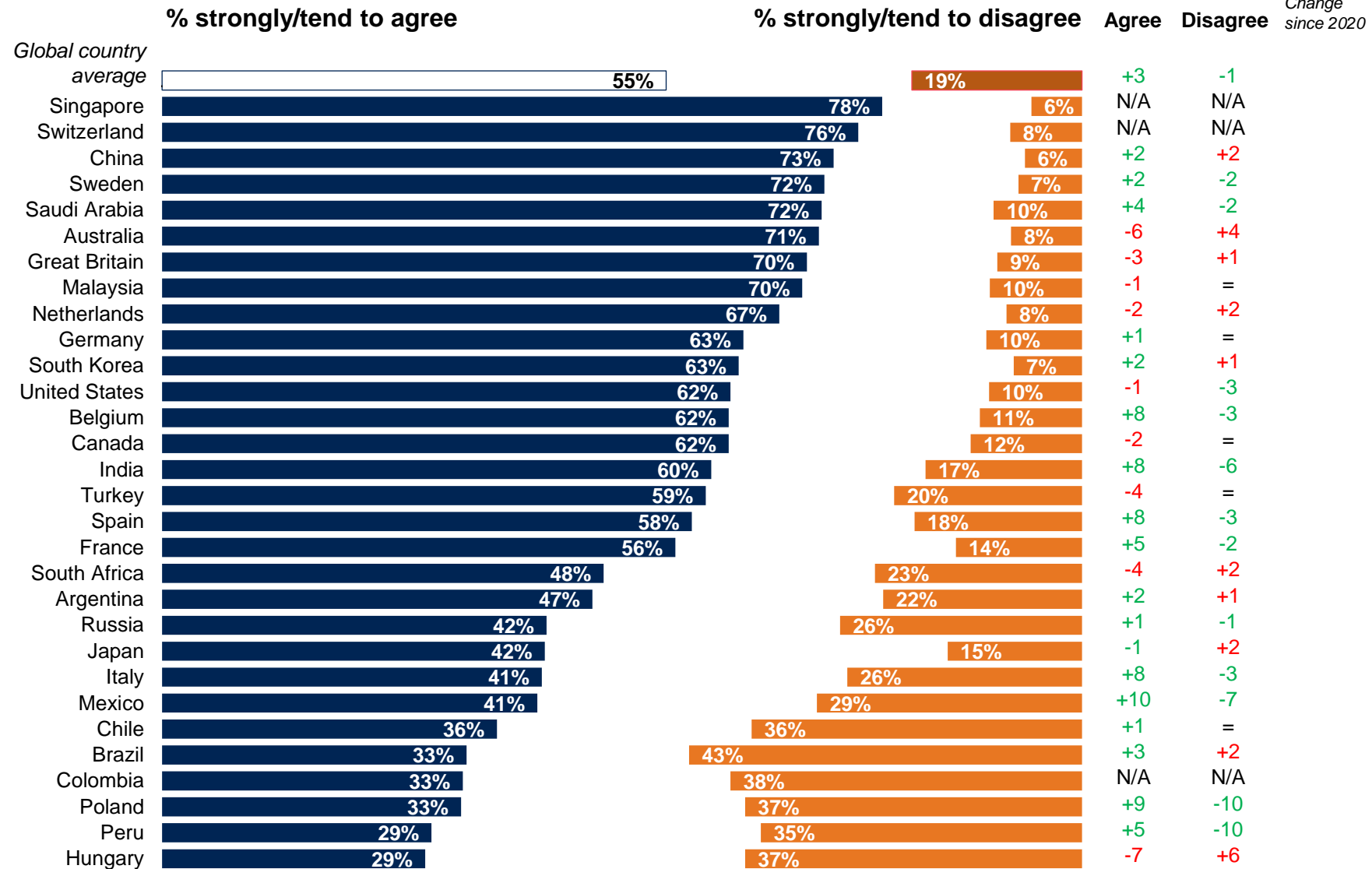
1. Tran, V., Riveros, C. & Ravaud, P. Patients' views of wearable devices and AI in healthcare: findings from the ComPaRe e-cohort. *npj Digit. Med.* **2**, 53 (2019) doi:10.1038/s41746-019-0132-y

2. Ipsos Mori

Health service information

In my country, information about healthcare services is readily available when I need it.

To what extent do you agree or disagree with this statement?



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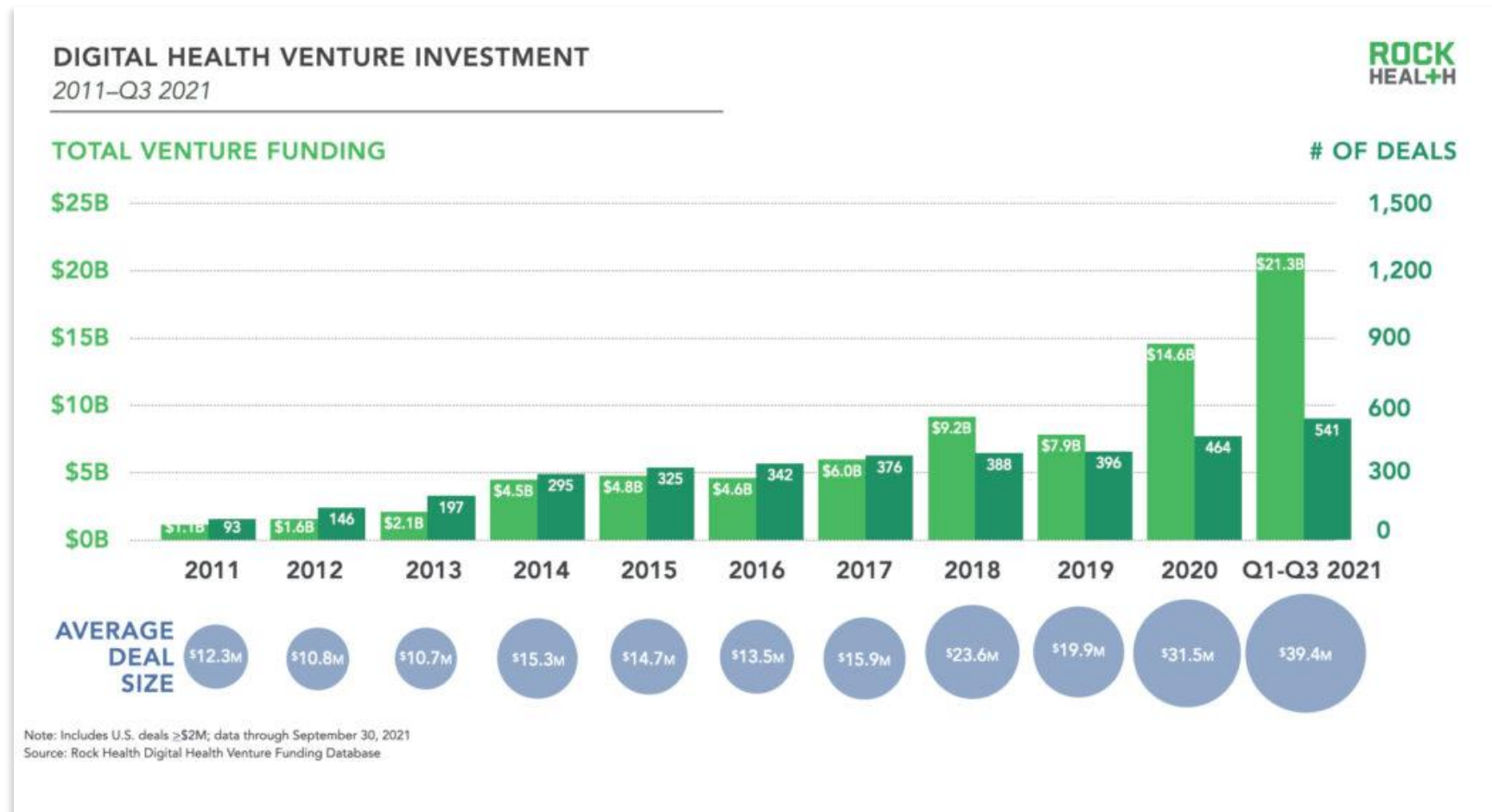
“GOOD HEALTH IS CREATED”



<https://reachtl.org/services>

Digital health M&A set a record in the first half of this year - \$46.1B on deals.

Funding overview



2021 has already surpassed \$20B mark in digital health venture funding, with a whole quarter to go...

Average deal size: 2020 = \$31.5M. 2021 = \$39.4M

Digital health funding boom

Funding overview

TOP FUNDED VALUE PROPOSITIONS

2018–Q3 2021; ordered by 2021 funding

	2018	2019	2020	Q1-Q3 2021
RESEARCH & DEVELOPMENT CATALYST	\$1.2B 2 nd	\$711M 7 th	\$2.1B 2 nd	\$4.7B 1 st
ON-DEMAND HEALTHCARE	\$1.6B 1 st	\$1.3B 1 st	\$2.8B 1 st	\$3.4B 2 nd
TREATMENT OF DISEASE	\$773M 8 th	\$903M 3 rd	\$1.5B 4 th	\$3.1B 3 rd
FITNESS & WELLNESS	\$1.2B 5 th	\$1.2B 2 nd	\$1.8B 3 rd	\$2.9B 4 th
NON-CLINICAL WORKFLOW	\$548M 10 th	\$640M 9 th	\$1.0B 8 th	\$2.1B 5 th
CONSUMER HEALTH INFORMATION	\$1.0B 6 th	\$506M 10 th	\$1.1B 7 th	\$2.0B 6 th

TOP FUNDED CLINICAL INDICATIONS

2018–Q3 2021; ordered by 2021 funding

ROCK
HEAL+H

	2018	2019	2020	Q1-Q3 2021
MENTAL HEALTH	\$1.2B 1 st	\$731M 1 st	\$2.3B 1 st	\$3.1B 1 st
CARDIOVASCULAR DISEASE	\$586M 3 rd	\$532M 2 nd	\$1.0B 4 th	\$1.4B 2 nd
DIABETES	\$408M 4 th	\$502M 3 rd	\$698M 5 th	\$1.4B 3 rd
PRIMARY CARE	\$931M 2 nd	\$416M 5 th	\$1.4B 2 nd	\$1.4B 4 th
ONCOLOGY	\$398M 5 th	\$468M 4 th	\$1.3B 3 rd	\$1.2B 5 th
SUBSTANCE USE DISORDER	\$198M 9 th	\$247M 9 th	\$554M 6 th	\$793M 6 th

Personalized medicine, on demand healthcare rising in funding

Mental health remains the top funded clinical indication.

Note: Companies can be tagged to multiple value propositions and clinical indications. Rock Health tracks 20 value propositions and 23 clinical indications. For clinical indications, we include funding for companies that have a service/offering for that particular indication even if it's not the exclusive focus of the company (e.g., Amwell is included in "mental health," but is not exclusively focused there). Funding numbers seen here are rounded to the closest decimal point, so while some numbers may appear the same, they are not equal. Includes U.S. deals ≥\$2M; data through September 30, 2021. Source: Rock Health Digital Health Venture Funding Database

Investment examples:

- **Hinge Health**, a digital musculoskeletal clinic, raised \$300 million Series D that valued it at \$3 billion – **ON DEMAND HEALTH**
- Australia-based **myDNA**, which offers a DTC genetics testing kits and nutrition and exercise programs based on the results, raised \$72.1 million in a mix of equity and other options – **DEVELOPMENT CATALYST**
- **BehaVR**, a VR-based wellness and digital therapeutics company focused on stress, addiction, and pain, raised \$7.2 million – **TREATMENT**

Self care in the home: **voice, self tests and robots**



Voice enabled health services



At home Robotics



Personalised skin and wellness coach



At home testing

Shift in community care and pharmacy services: On demand, e-commerce, self serve

HealthTech Companies

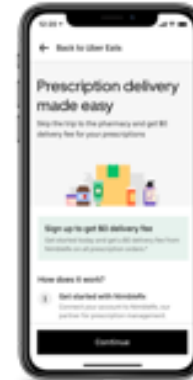
Pharmacy2U

Babylon Health

MFine

Sesame

Health kiosks (e.g. cammax, Higi)



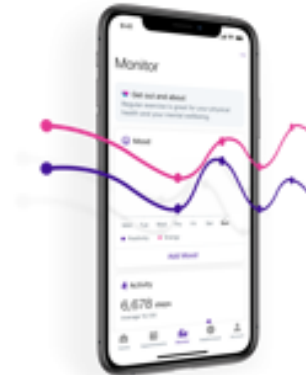
Entry from big players

Amazon PillPack

Walmart prescriptions

Uber/ Deliveroo OTC

MedBase and Zur Rose JV



Telehealth and virtual care services: integrated solutions, chatbots and asynchronous care



Remote monitoring: wearables, devices and AI driven care



Patches, on skin wearables



Smart watches, smart clothing



AI driven cloud solutions

How will this impact Doctor-Patient paradigm?



Doctors see the patient empowerment movement as a positive

Data from Ipsos digital doctor

85%

Digital health tools have made patients more interested in their own health data

82%

Digital health tools make it feel easier for patients to understand their own health

81%

Digital health tools have motivated patients to have more control over their weight and diet

Drivers and barriers to use



Drivers



Compliance



Early intervention



Reduce practice visits



Barriers



Patient mis-interpretation



Incorrect self diagnosis



Data security

THE ROLE OF PHARMACISTS?

- Digital champions
- Specialise in treatment and management of more complex conditions
- Deep understanding of genetics/personalised medicine



What are our predictions for the future of health?

Companies which empower consumers/patients and put trust and data privacy at the heart of their strategy will win

Payer and market access is critical to this new health future. Integrated care budgets and value based contracting will be the new normal

Remote monitoring and digital therapeutics will be standard of care and treatment in the near future

... however, we must keep inclusivity at the heart of all this to achieve equity in health



CASE STUDIES

Website optimisation to create patients who are active participants in their treatment

Website optimisation

Example output from card sorting exercise

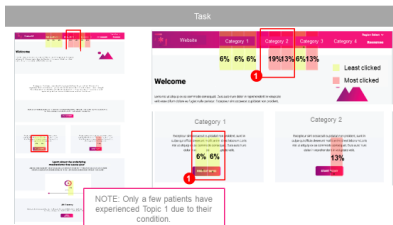
Results matrix

This table shows number of times that each card was sorted into the corresponding category.

	Category 1	Category 2	Category 3	Category 4	Category 5
Topic 1	11	3	2		
Topic 2	12	2		1	1
Topic 3	5	9	2		
Topic 4	3	2	9		2
Topic 5		10	1	2	3
Topic 6	1	10		1	2
Topic 7	2	11	2	1	
Topic 8	2		1	11	
Topic 9	1	1	2	10	2
Topic 10	1	11	3		1
Topic 11	3	6	6		1
Topic 12	1	3	8	2	2
Topic 13	7	7		2	
Topic 14	1	4	6	2	3
Topic 15		6	6		4
Topic 16	3	5	5	1	2

Example output from chalk mark exercise

Results from the one click exercise are in line with the card sorting exercise. Topic 1 should be allocated in the Category 1 section



Sector: UX & Healthcare

Region: UK & Canada

Business issue

To develop a website for patients that plays a role in creating “active” patients who demand better treatment options from their HCP.

For the therapy area this project is focused on, there are many treatments that currently exist which target its symptoms. Our client's product, however, actually works in a preventative way to target the root cause of the condition.

Our client wants to encourage and empower patients to demand better treatments from their HCPs by equipping them with knowledge of their condition and what is now possible with treatment.

Ipsos solution

A partnership between UX and healthcare combining UX research skills with therapy area and product expertise.

- We conducted 16 interviews across UK and Canada with patients who have the condition
- We shared aspects of the website and went through certain activities to test the website navigation, layout, usability and value:
 - The categories certain topics had been grouped under
 - The pathways that must be taken to access certain website features
 - Where participants navigate to find certain information
- Analysis of the activities demonstrated several opportunities for optimization including: where certain topics should be regrouped into different categories, the sections participants tend to fall back on when looking for a wide variety of information and where to best place certain website features.
- We were also able to give over-arching recommendations based on our advanced UX experience for what website features work well across the board

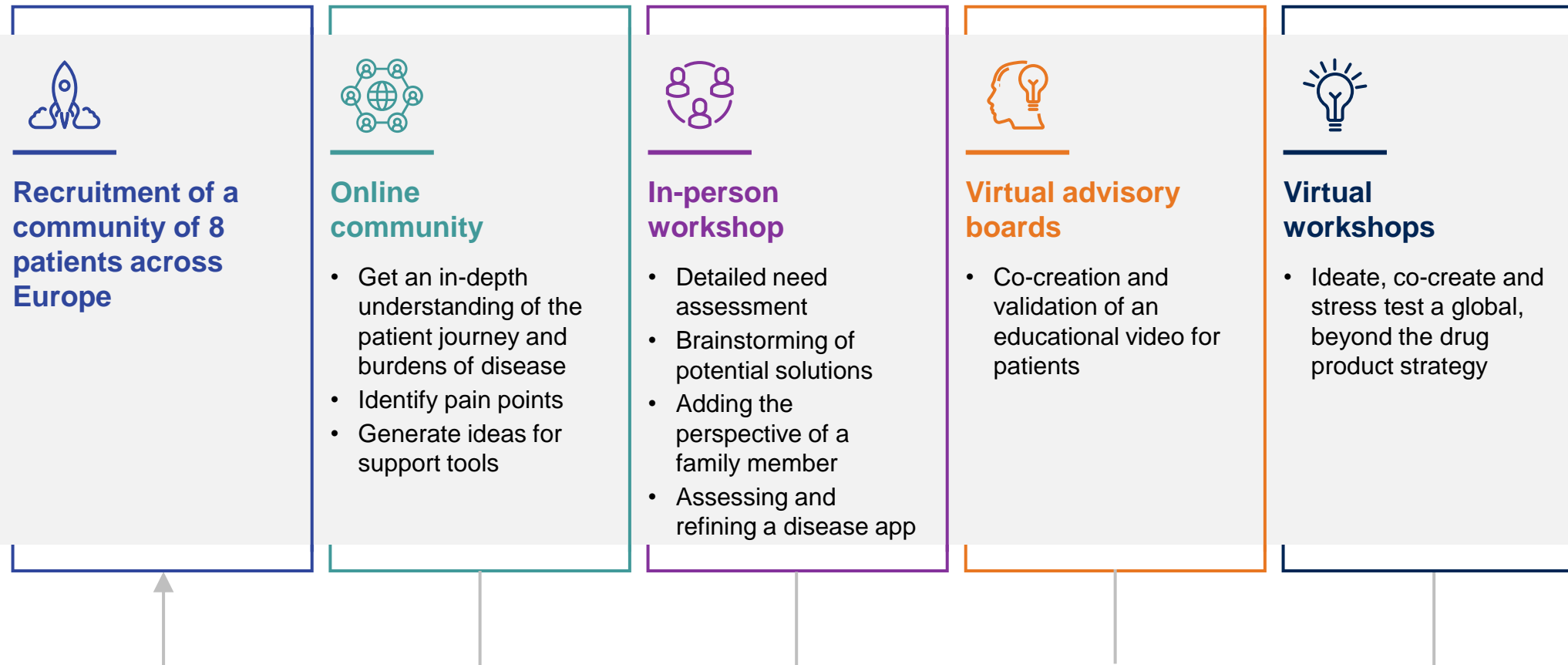
Client benefit

Concrete recommendations for website optimizations to improve navigation and structure.

Developing empowering tools for patients with patients

In preparing the launch of a treatment for patients diagnosed with a rare disease, our client wanted to:

- **Understand the patient journey, the associated burden of disease and identify pain points**
- **Develop tools that empower patients** to take ownership of their disease and to optimize their experience

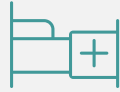


Feedback loop back to participants

Output and value delivered to the client



Access to a motivated and highly committed long-term community



Comprehensive understanding of the patient journey, the burdens of disease and its pain points



Concepts for tools and solutions beyond the drug that empower patients to make a real difference in their lives



A disease app with tailored functionalities and content to better self-manage the condition



An educational video that encourages patients to seek for support and an early diagnosis



Enables our client to tailor their strategy and offerings to patients' needs in order to improve outcomes and ultimately strengthen the brand experience

THANK

YOU

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GAME CHANGERS

