

Understanding the Patient Journey

Bringing Access and Care Closer to the Consumer

PRESENTED BY
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 HEALTHLINE MEDIA



Patient Centricity Drives Impact

CLARITY

Make it
**understandable
and actionable**

CONNECTION

Make it
cohesive

COST

Make it
**affordable
and accessible**

CONVENIENCE

Make it
easier

CONSUMER NEEDS THAT CAN DRIVE TO BETTER OUTCOMES

CLARITY

Consumers need clear, actionable information

89%

proactively research treatment information for medications they are prescribed or interested in trying

LOOKING UP

Side effects

Cost of medication

Safety information for long-term use

Other people's experiences taking same medication

PROMPTED BY

Direct reason

67%

doctor, diagnosis
symptoms, side effects

Curiosity

79%

advertisements, news coverage
online or social media



CLARITY

CALL TO ACTION

How to deliver engaging content

It's about the what, when, and how

SIMPLICITY

Uses easy to understand language

Unpacks what to expect

CONVENIENCE

Quick answer to questions

Easy to access

HOLISTIC

Takes lifestyle and medical history into account

INTERACTIVE

Direct message to brand

Comments on social posts



CONNECTION

Consumers face gaps in the care journey

43%

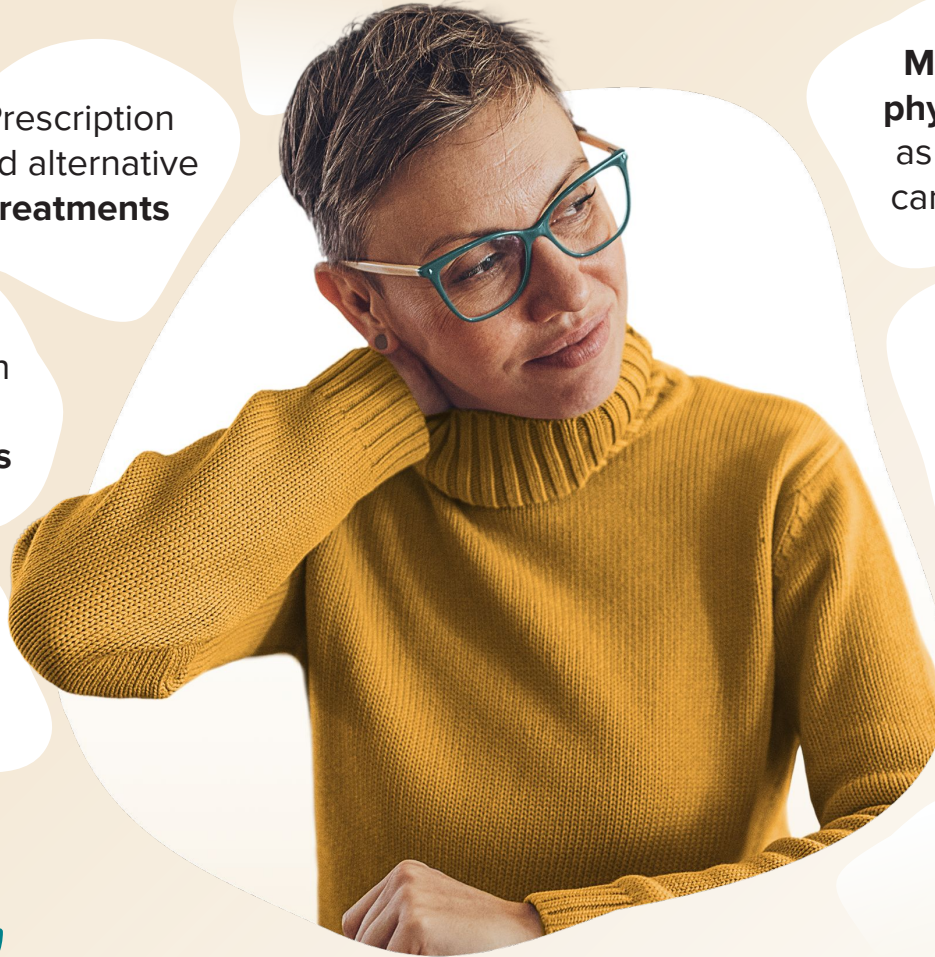
evaluate resources based on how they “take into account my lifestyle and medical history”

Prescription and alternative treatments

Living with multiple conditions

Interconnections between different aspects of health

WHOLE PERSON



Multiple physicians as part of care team

Disparate communication

27% find acting as the middleman between doctor, pharmacy, and insurance challenging

Multiple, disjointed visits and tests

HEALTH SYSTEM



CONNECTION

CALL TO ACTION

Digital solutions build cohesion

Tools and services increase engagement



53%
engage with **physician influencers** on social media²

70%
turn to **condition influencers** for tips on managing a condition²

62%
want services **connected within the same experience** rather than using different brands and services for different needs¹

68%
want **helpful hints** of little things to do each day³



COST

Consumers need knowledge of cost solutions earlier

Among people who say **affordability of medications** is a challenge

73%
proactively look for **cost of medication**

43%
proactively look for **discount programs or ways to save**

BUT
Only 23%

have **used** payment support programs or manufacturer coupons on medications



COST

CALL TO ACTION

Integrate cost solutions where consumers are

Reach consumers actively seeking cost information

Of the 39% of people who **have heard of manufacturer coupons**

WHERE TO EDUCATE

63%

Healthcare Professional

40%

Health Information Websites

36%

Social Media

**Only 22% from
Pharma Websites**



CONVENIENCE

Consumers want an easier healthcare experience

PAIN POINTS

31%

Hard to schedule or
have to wait too long
for healthcare visits²

29%

Getting **diagnostic testing**
*(blood tests, exams)*¹

46%

Dissatisfied with pharmacy
due to inability to compare
Rx medication prices³

CONVENIENCE

CALL TO ACTION

Resources and services can address convenience concerns

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31%

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WHAT THEY NEED

31%

Direct connect to HCPs

25%

Remote or telehealth support

31%

At-home lab testing kits

25%

Pharmacy delivery services

25%

Pharmacy locators



Patient Centricity Drives Impact

Provide clarity to **drive to patient support**

Connect with consumers to move them
from information to action

Communicate with consumers in the
channels where they are

Create cohesive experiences that **foster
deeper engagement and drive outcomes**





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