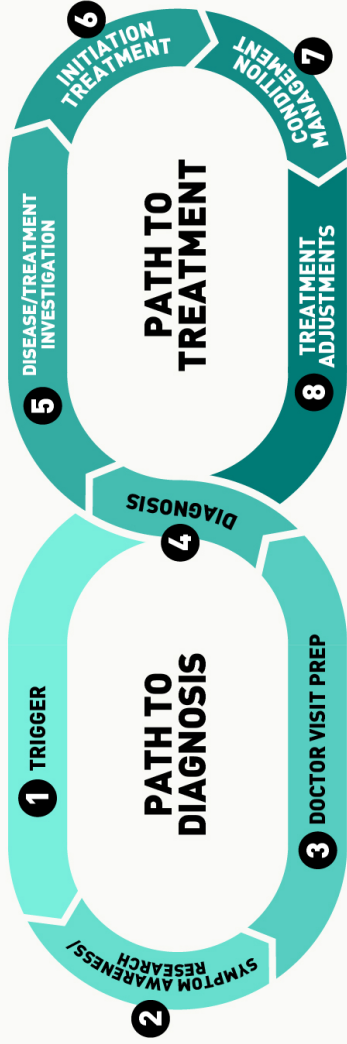


TODAY'S CHRONIC PATIENTS: JOURNEY INTELLIGENCE

As part of RAPP's ongoing commitment to journey-based intellectual property, our latest customer experience management research, or CXM study, focuses on the healthcare vertical with an emphasis on chronic conditions. This study uncovers and quantifies points of pain, influence and channel preference of patients newly diagnosed, recently treated and active in treatment, and intelligence around medication adherence, health technology and beyond.

A patient journey for chronic conditions begins when symptoms occur – patients become emotionally charged, often anxious and frustrated, upon diagnosis as they navigate through the healthcare ecosystem. Mental health, however, improves at the onset of treatment as patients remain hopeful for what is to come. Acceptant of the situation, they then integrate the medication region into their lifestyles in hope to optimize health outcomes.

Understanding the many touch-points driving the patient journey could inspire the health system and providers to add value, meeting patient needs and expectations, and ultimately, facilitating an encouraging and positive experience.



KEY

- Major challenges experienced by the patient during this phase
- Actions influencing the patient's decisions, top of mind during this phase

1 TRIGGER

Experiences and factors prompting the need to evaluate health and wellbeing

TIME SPENT

- On average, 31% of patients waited more than a month to seek medical advice.

TOP TRIGGERS

- 55% Had a regular primary care provider (PCP) annual checkup
- 50% Informed a medical condition from a doctor's visit
- 48% Requested medical lab tests or diagnostic procedures, indicating a potential condition

2 SYMPTOM AWARENESS/RESEARCH

Actively researching symptoms before seeking medical care

TOP USED CHANNEL

- Mobile health app

TIME SPENT

- 38% of patients researched and selected a provider in less than a week.

TOP EMOTION

- 55% are anxious

TOP POINTS OF PAIN AND INFLUENCE

- 40% Researching holistic options to treat my symptoms
- 89% Researching symptoms to identify possible medical conditions

3 DOCTOR VISIT PREP

Researching Providers to schedule an appointment for a doctor's visit

TOP USED CHANNEL

- Physician office

TIME SPENT

- 30% are scared

TOP POINTS OF PAIN AND INFLUENCE

- 56% Researching insurance coverage for seeing a provider/specialist*
- 88% Researching for a specialist for my condition

DID YOU KNOW?

The younger segments are frustrated with the obsolete care-seeking diagnostic process. 57% of 18-44 year olds experience pain when switching holistic options.

*Identified as both Points of Friction & Drivers of Choice

4 DIAGNOSIS

Receiving diagnosis and health evaluation from Provider

TOP EMOTION

- 29% are sad

TIME SPENT

- Over 51% of patients received a formal diagnosis within their first doctor's visit, followed by 37% by their second visit.

TOP FEARS AND ANXIETIES

- 69% Illness progression
- 62% Uncertain about the future
- 43% Being a burden
- 43% Dying from the condition
- 34% Not being there for family

5 DISEASE/TREATMENT INVESTIGATION

Learning more about the condition and further understanding associated causes, symptoms, and treatment options

TIME SPENT

- Nearly 1 in 3 of patients spent less than 6 hours researching their condition and treatment options while nearly 14% did not conduct further research.

TOP EMOTION

- 30% are sad

TOP POINTS OF PAIN AND INFLUENCE

- 62% Coping with the stress of the diagnosis
- 89% Researching proper assistance and answers around my condition

TOP USED CHANNEL

- Medical website

6 TREATMENT INITIATION

Filling the first prescription and taking the first dose

TIME SPENT

- 2 of 3 patients received their first prescription in less than a week from the time of diagnosis.

TOP EMOTION

- 30% are relieved

TOP POINTS OF PAIN AND INFLUENCE

- 51% Making necessary adjustments to my lifestyle and behaviors to maximize my treatment outcomes
- 72% Getting prior authorization/insurance approval to fill the prescription

TOP USED CHANNEL

- Internet search

7 CONDITION MANAGEMENT

Ongoing use, managing possible side effects, and adhering to drug therapy regimen

TIME SPENT

- 40% of patients stay on their current regimen long enough time for the drug to take full effect.

TOP EMOTION

- 45% are anxious

TOP POINTS OF PAIN AND INFLUENCE

- 55% Maintaining necessary lifestyle changes to adhere to the treatment plan
- 71% Monitoring medication side effects and drug reactions

TOP USED CHANNEL

- Physician office

8 TREATMENT ADJUSTMENTS

Determining treatment effectiveness, continuation, or switching treatment to improve health outcomes

TOP EMOTION

- 55% are hopeful

TOP POINTS OF PAIN AND INFLUENCE

- 44% Seeking other treatment options and drug therapies
- 77% Determining if the medication is improving my health and condition

TOP USED CHANNEL

- Email/DM

REASONS BEHIND MED NON-ADHERENCE

- 33% Cost
- 32% Time management
- 29% Medication side effects

22% Stopped taking the prescribed drug or discontinued treatment

DID YOU KNOW?

44% of patients can know how long it takes for the new drug to reach full efficacy, if that's not immediate, and how long to stay with a drug, if it doesn't seem to relieve the pain or condition

64% of patients/pharmacists making sure prescribed meds are covered, insurance to balance the needs and costs (would enhance the treatment adjustment experience)

FACTORS ENHANCING THE TREATMENT ADJUSTMENT EXPERIENCES

- AFFORDABILITY
 - Balanced treatment costs
 - Prescription is covered by insurance
 - Lower/l copays
- REGIMEN
 - Explanation of side effects
 - Ability to compare drugs
 - Drug effectiveness timeline

The Modern Patient Journey, 2021 Healthcare CXM Study for Chronic Condition Diagnosis and Treatment. Published December 2021. For more information, contact the Consumer & Market Intelligence team at DMIRAPP.com.

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