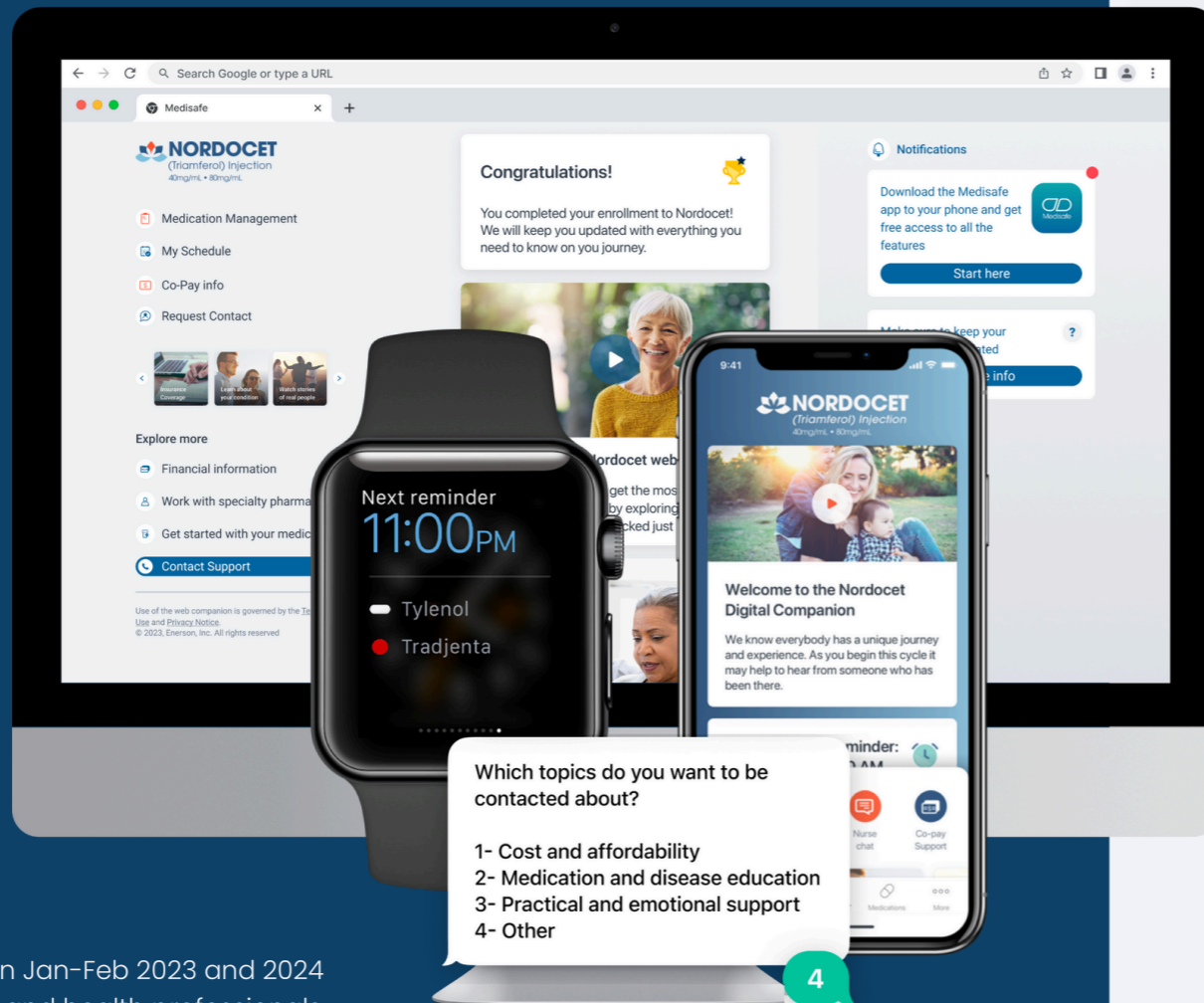


STATE OF PATIENT DIGITAL SOLUTIONS

2024

STATE OF PATIENT SOLUTIONS

2024



Sources:
Medisafe Survey data taken Jan-Feb 2023 and 2024
of more than 1,100 patients and health professionals

Contents

Summary, Key Findings

Top 3 Digital Benefits: Patients vs. HCPs

Patients '23 vs '24: Telehealth Slips

About AI: Patients Aren't Convinced

Patient Use of Health Apps

Top Obstacles to Digital Solutions

Planning Digital Health Solutions in 2024

Patient Digital Solutions in 2024

Medisafe surveyed 637 patients, HCPs and digital health professionals about what they see as the state of solutions in 2024. Some key findings:



Telehealth Less Crucial in 2024:

Coming off the COVID highs of last year, patients are less **interested in telehealth** as a top three digital health solution.



Patients Want Appointment Trackers:

Patients are **more than twice as likely** to want digital solutions to track appointments than brand and marketing professionals believe.



More Co-Pay & Caregiver Support :

Digital health professionals surveyed put less emphasis this year on telehealth, educational resources and **more on co-pay and caregiver support/monitoring**.



On A/I, Depends Whom You Ask:

Pharma brand and innovation teams surveyed were **2X more likely to say AI** will improve patient outcomes than patients and providers.



Sending Reports As a Top Benefit

Patient support organizations are 29% more likely to list sending reports as a top benefit, compared to pharma digital and brand teams



Patients under 30 See Digital Differently

Patients 30 and under are more interested in measurements, journaling , co-pay and patient coaching than those 60+, and they **also want more educational resources**.

2024: Pharma's Digital Stage Is Set

A post-COVID world with new patient habits creates higher digital expectations, value

*“Leading pharma companies will use 2024 to **reinvent the model** in a way that matches the moment and **sets the stage** for competing differently in the years ahead.”*

- [PWC: Next in Pharma 2024: Reinventing for Returns](#)

The collage features three news snippets:

- PharmExec.com** (top): "More Gen AI, Direct to Patient Models & Digital Health Top What's On the Horizon in 2024" (January 10, 2024)
- Forbes** (middle): "Top Five Imperatives For Healthcare And Pharmaceutical Leaders In 2024" (Feb 21, 2024, 07:15am EST). The list includes:
 1. Embrace AI-driven transformation.
 2. Prioritize the patient experience.
- EY** (bottom left): "48% of healthcare and pharma companies poised to integrate first-Gen AI solution within the next year: EY Report" (24 Jan 2024)
- Lilly** (bottom right): "Lilly Launches End-to-End Digital Healthcare Experience" (January 4, 2024)

What are the top three benefits that digital solutions for patients should provide?

Patients Say:



49%

Track Appointments



42%

Track Measurements



42%

Manage Refills

HCPs Say:



42%

Track Appointments



34%

Send reports to HCPs



33%

Manage Refills

Digital Health Professionals:



28%

Send Reports to HCPs



28%

Allow Family/Friend
Caregiver Monitoring

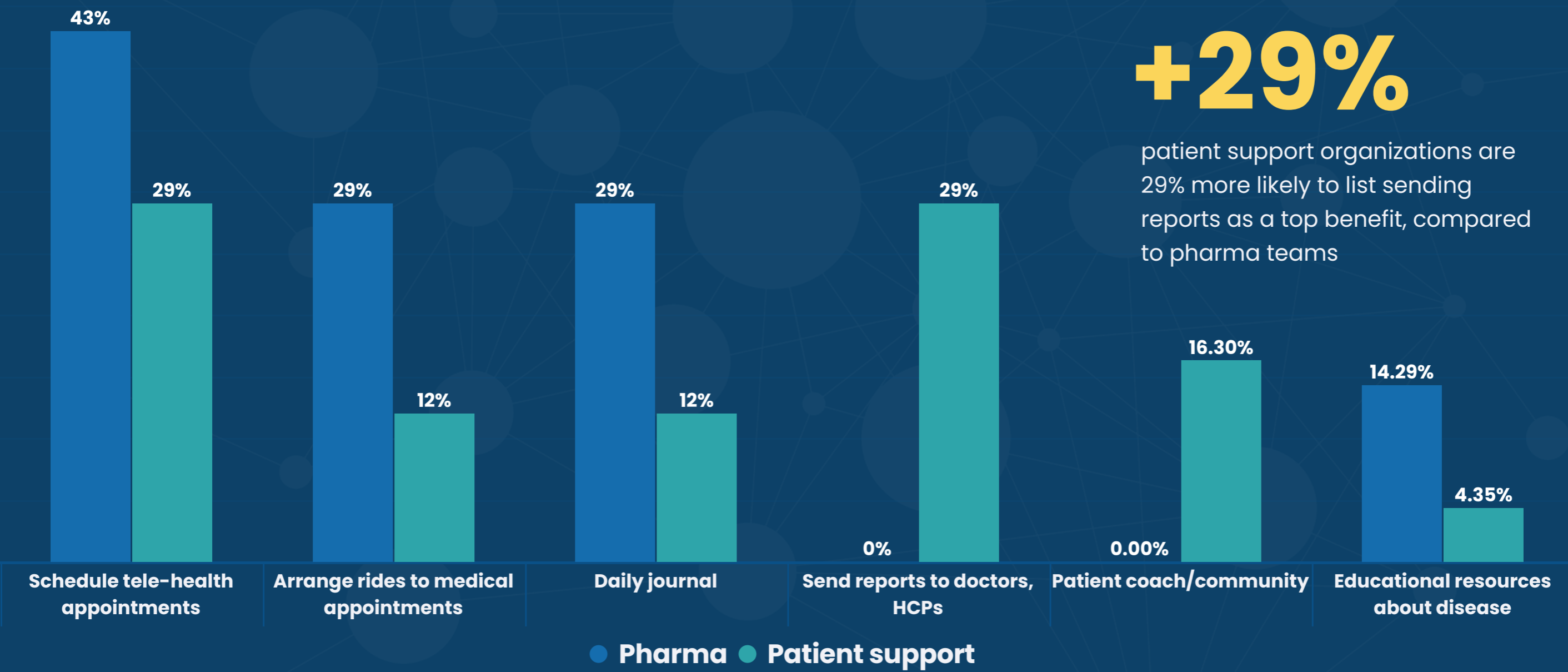


25%

Manage Refills

Pharma vs. Patient Support Organizations

What Are the Top Benefits That Patient Digital Solutions Should Provide?



Source: Medisafe Survey 2024

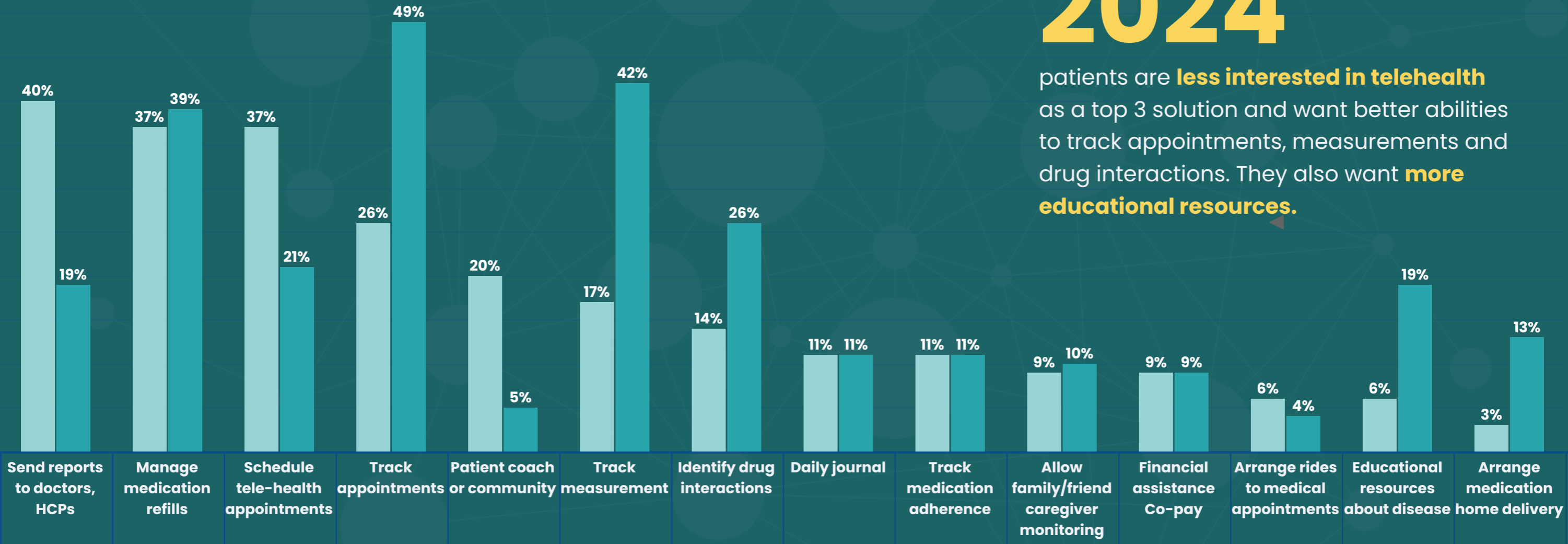
Patients 2023 vs. 2024:

What Are the Top 3 Benefits That Patient Digital Solutions Should Provide?

● Patients 2023 ● Patients 2024

2024

patients are **less interested in telehealth** as a top 3 solution and want better abilities to track appointments, measurements and drug interactions. They also want **more educational resources**.



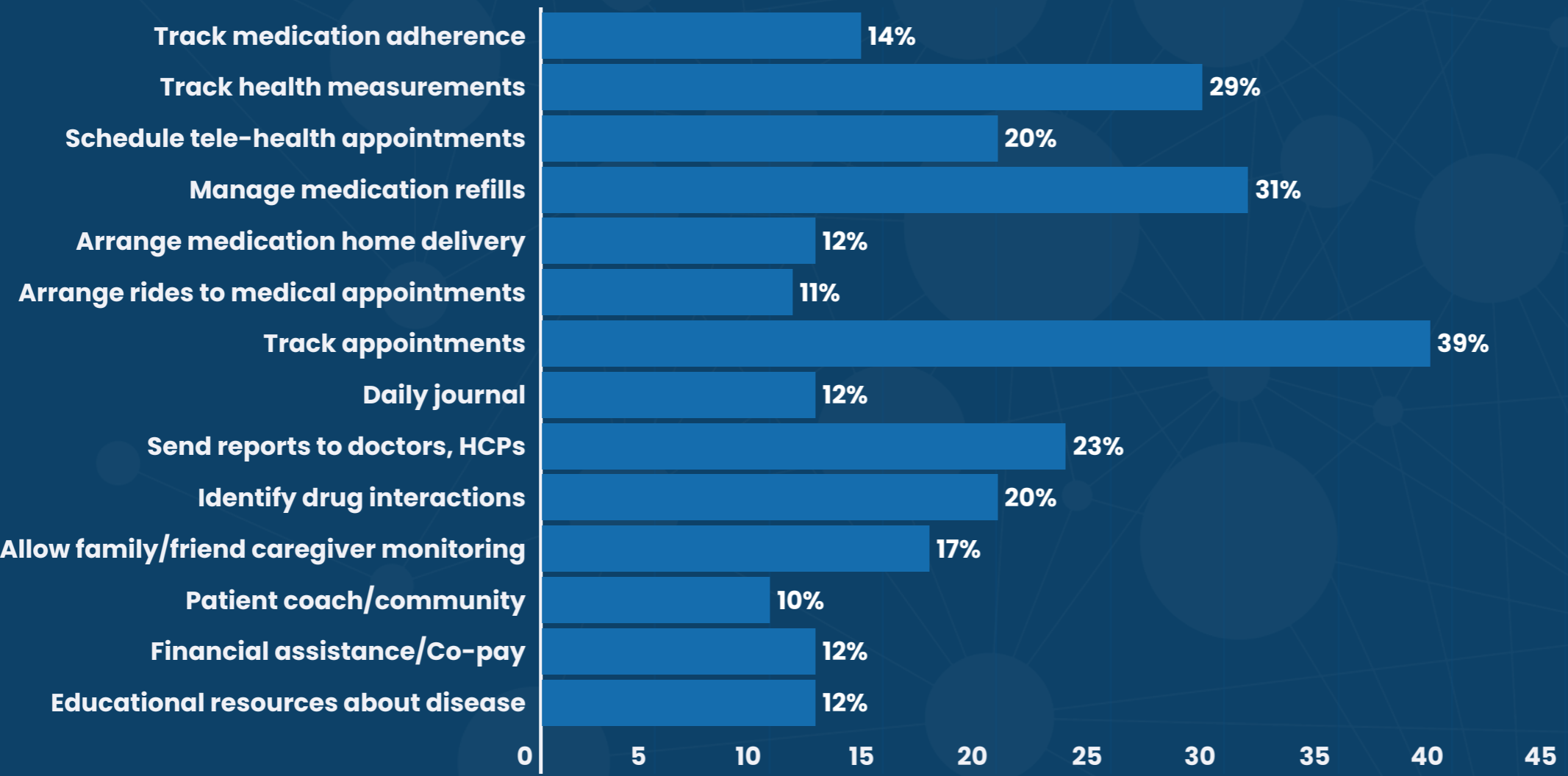
"I want one universal health record that I and only I control who sees it."

- Patient Survey Respondent

Source: Medisafe Survey 2023, 2024

2024 : What Are the Top Benefits That Patient Digital Solutions Should Provide?

< All Respondents >



-17%

year-over-year decline in patients listing telehealth as a top benefit of digital solutions should provide

"I don't think AI can insure data privacy, I don't think it can be controlled to protect humans." - Patient Survey Respondent

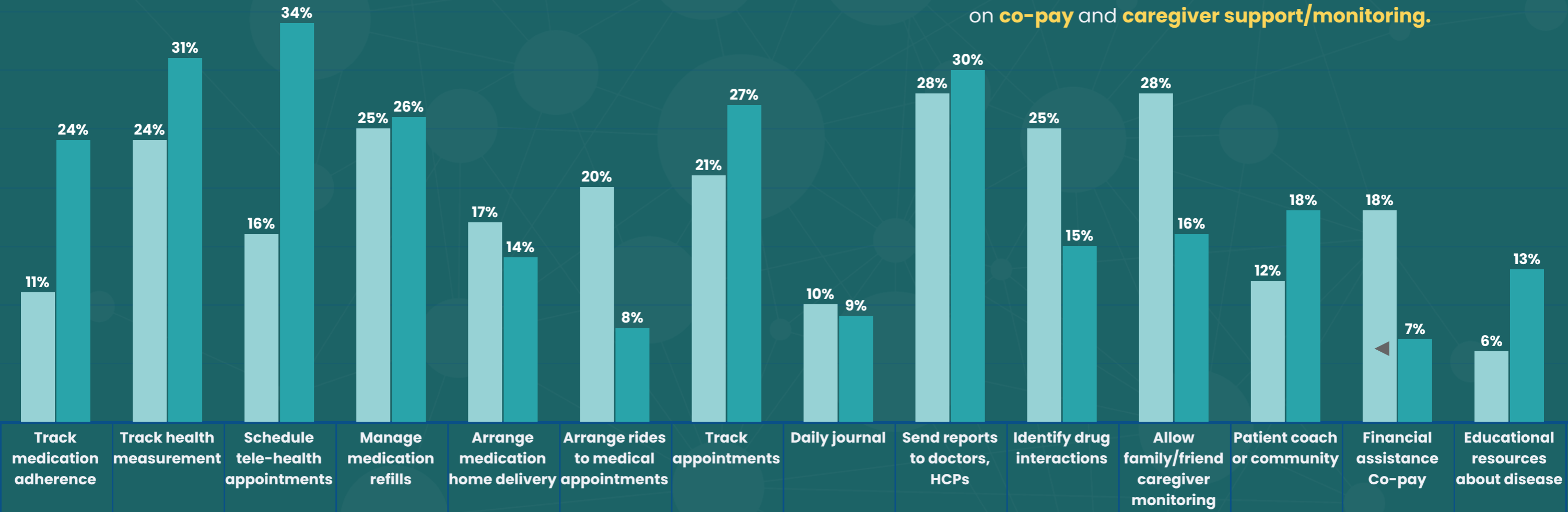
Source: Medisafe Survey 2024

Digital Health Professionals Last Year vs. Now

What are the Top 3 Benefits that Digital Solutions Should Provide?

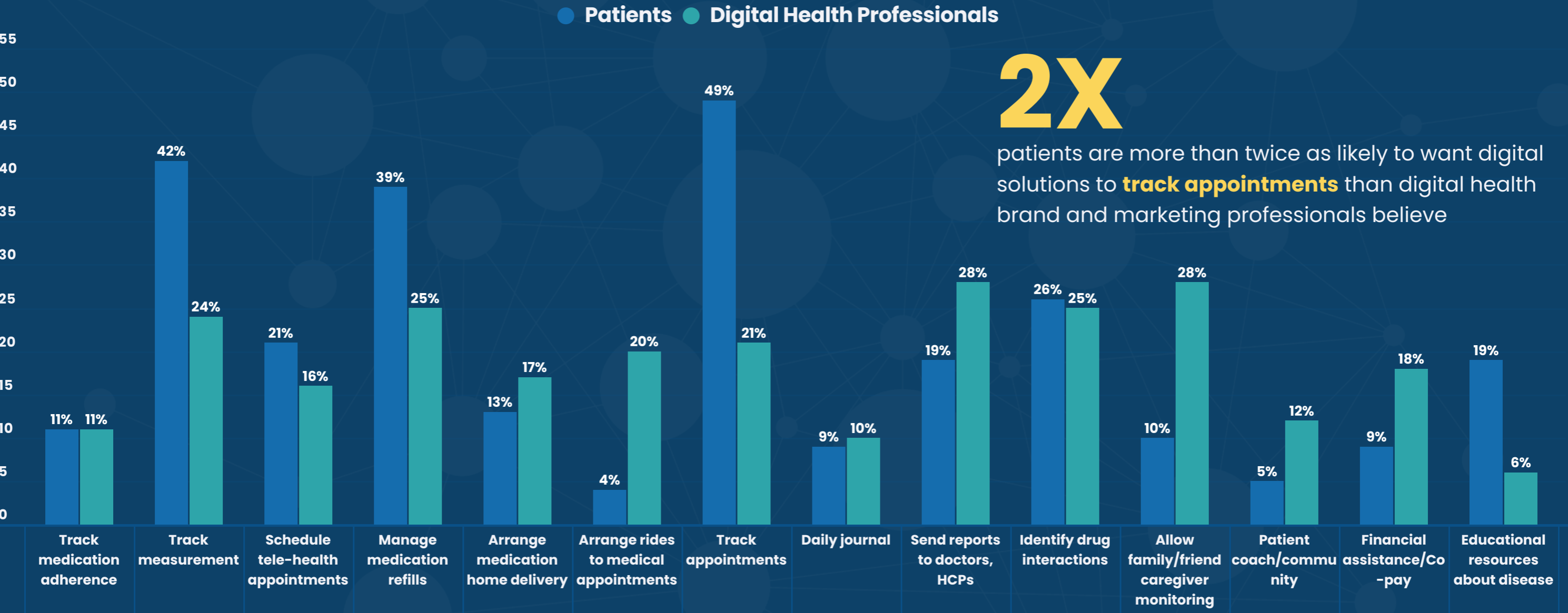
● 2024 ● 2023

Digital health professionals surveyed put less emphasis this year on telehealth, educational resources and more on **co-pay** and **caregiver support/monitoring**.



Patients vs. Digital Health Professionals

What Are the Top 3 Benefits That Patient Digital Solutions Should Provide?



"Digital solutions should facilitate patients' understanding of what providers are talking about"

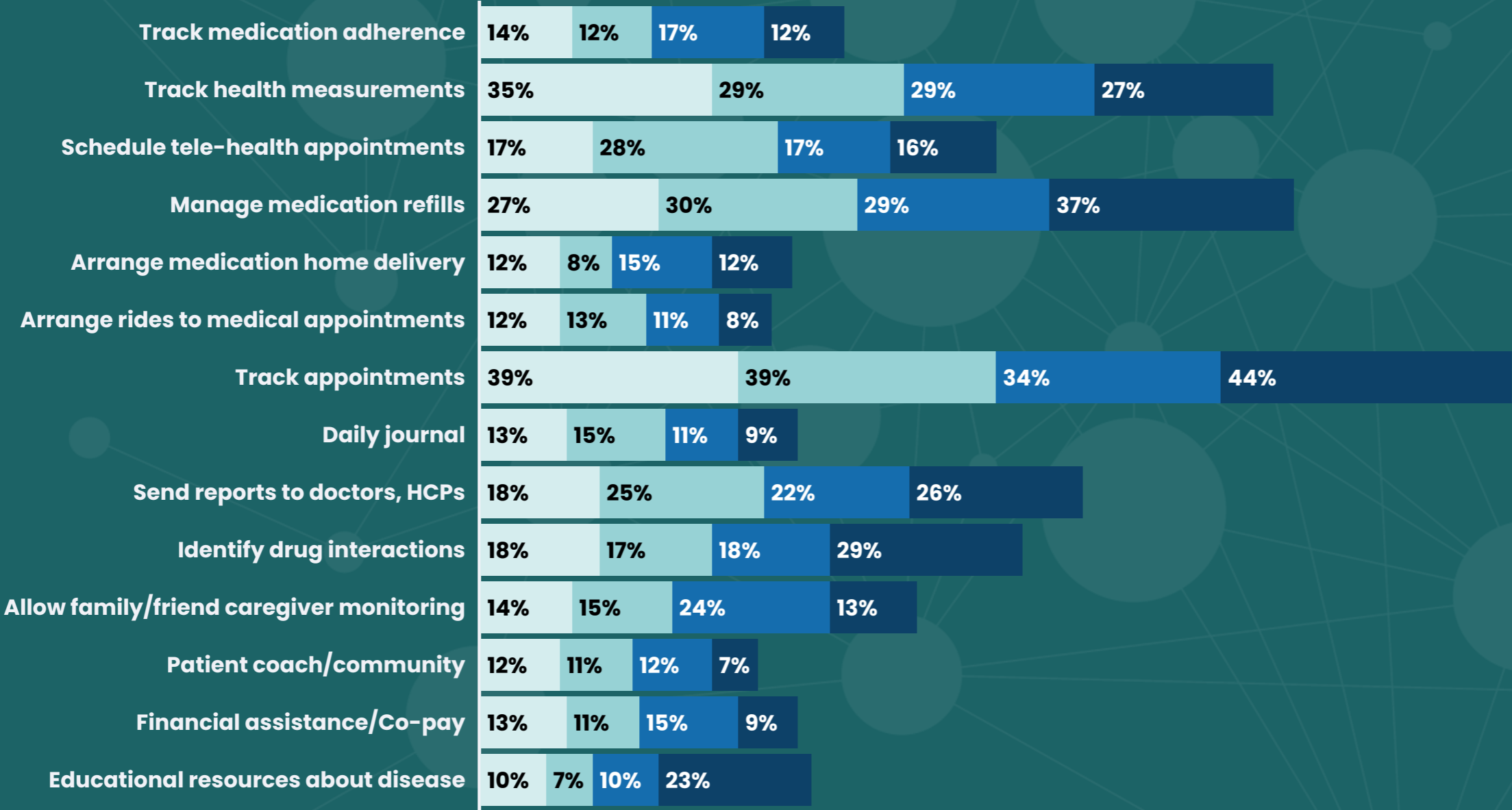
- Patient Survey Respondent

Source: Medisafe Survey 2024

What Are the Top 3 Benefits that Digital Patient Solutions Should Provide?

Responses by Age

● Ages 18-29 ● Ages 30-44 ● Ages 45-59 ● Ages 60+



Patients under 30 are more interested in measurements, journal, co-pay and patient coaching **than those 60+**

Source: Medisafe Survey 2024

Medisafe: Unquestionable Trustworthiness and Impact

Driven by dependable, experienced, and outcome-driven digital solutions

Your Advantage Starts Day 1

30B+ Patient Data Points

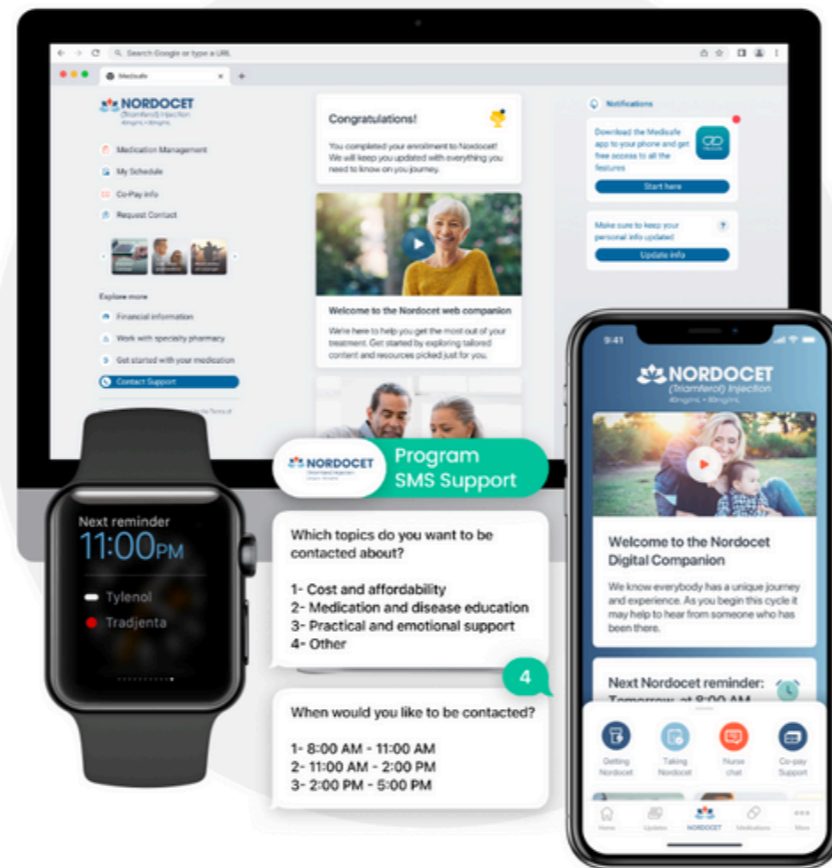
12M+ Registered Users

68% Engage at least 1X a day
10-30% higher than social media

Holistic Approach Gets Full View

6+ Medications managed by average Medisafe user

1.1M Doctors added by patients to manage appointments



Jump Start With Proven Expertise

15-20% Persistency lift
validated by 3rd parties

20+ Brand partnerships
Delivering over hundreds of millions of incremental revenue across brands

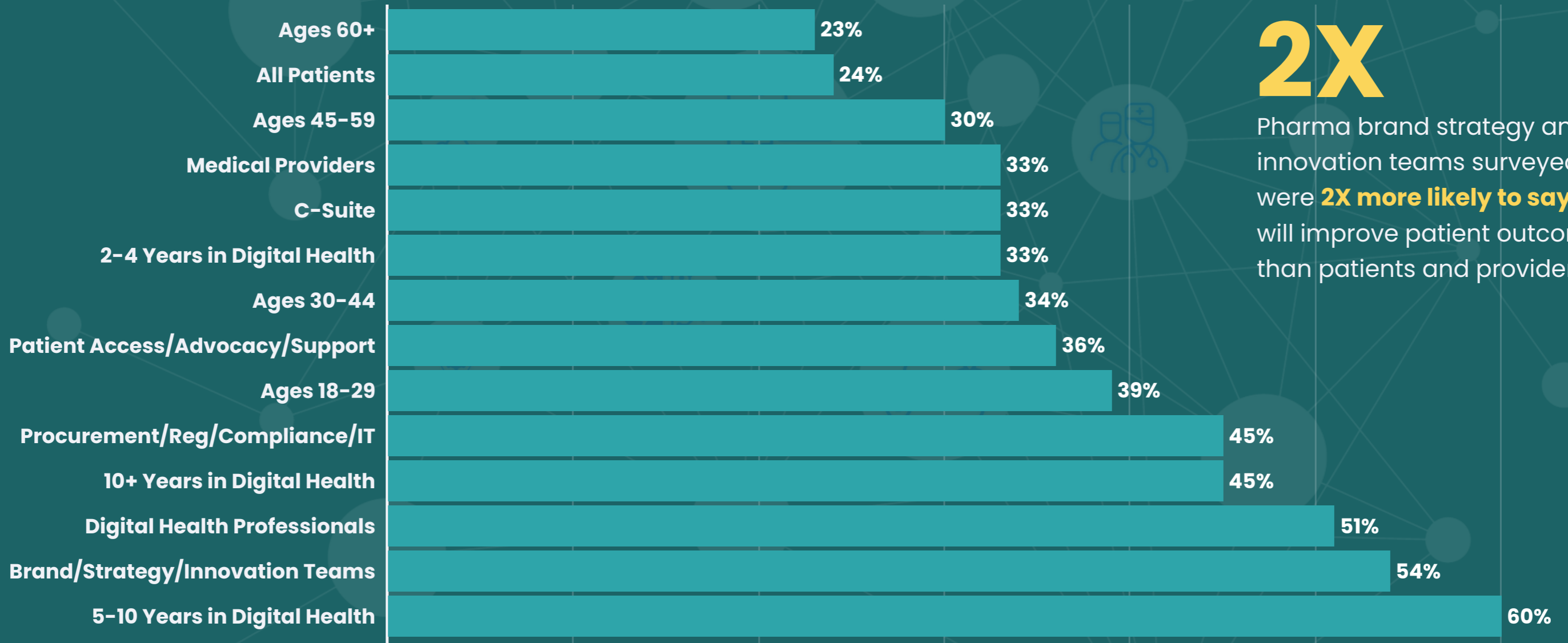
73% Increased connectivity
Nurse outbound patient reach has shown millions of dollars in savings through efficiencies (HUB/Copay, SP and CRM)

71 NPS of partner programs
Net Promoter Score alongside Amazon, Apple



AI: Many Aren't Convinced

Will AI Solutions Lead to Improved Patient Outcomes?



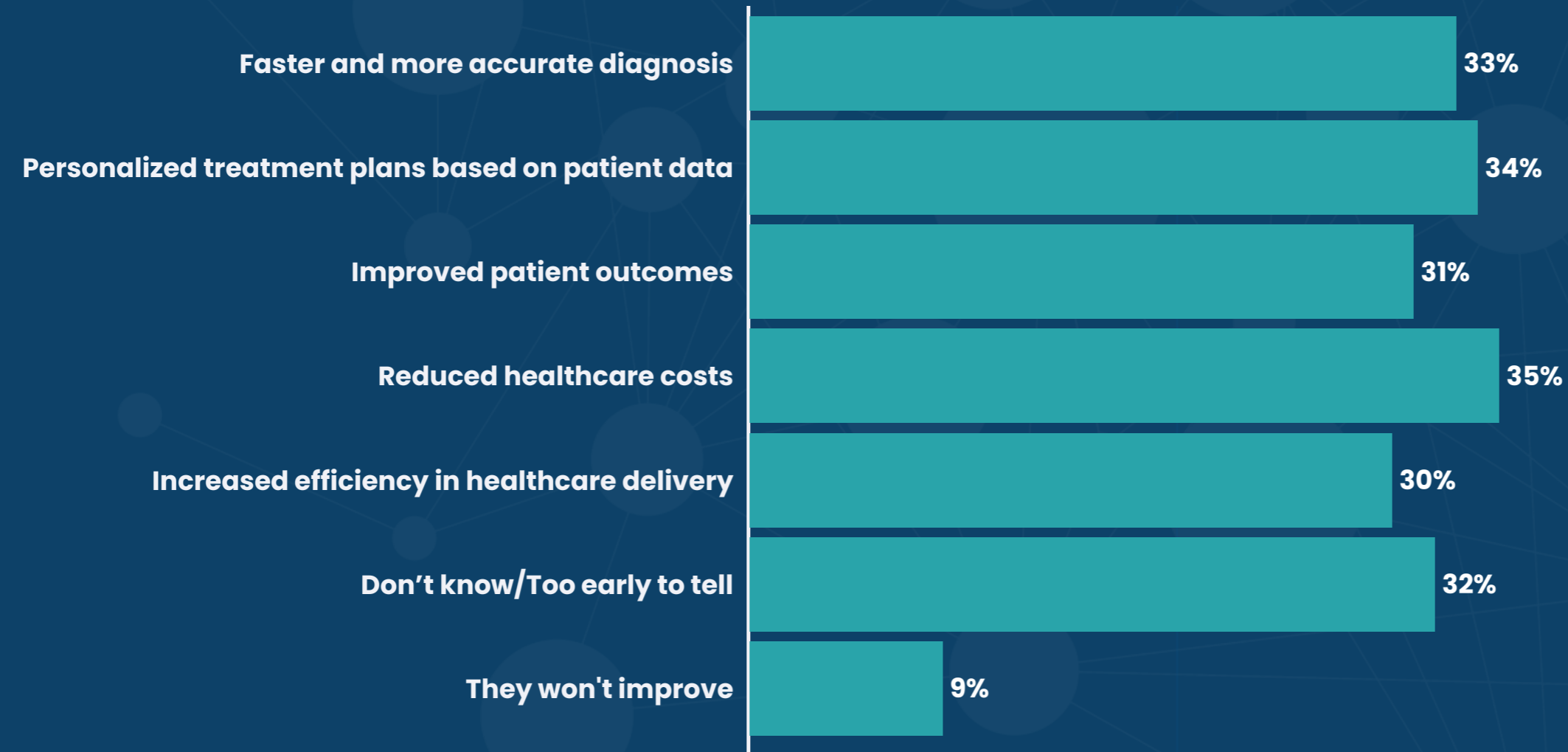
2X

Pharma brand strategy and innovation teams surveyed were **2X more likely to say AI** will improve patient outcomes than patients and providers.

How Do You Think AI Solutions Can Improve the Quality of Healthcare Services?



All Respondents



How do you see AI solutions evolving in the digital health space in the next year?

< All Respondents >

- Greater integration of AI solutions with existing healthcare systems
- More widespread use of AI-powered medical imaging analysis
- Increased focus on personalized treatment plans based on patient data
- Greater emphasis on ensuring the ethical use of AI in healthcare
- Increased use of AI-powered chatbots for mental health support
- No change in the coming year

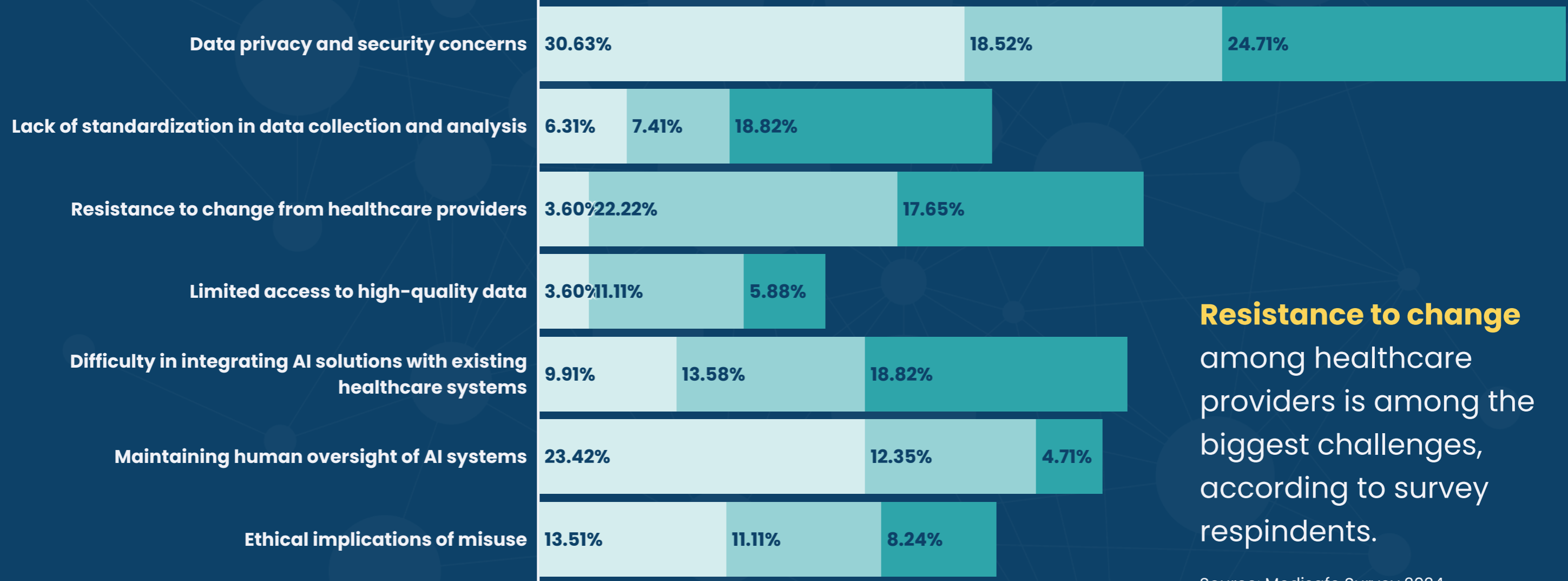


Most agree that **2024 will bring increased AI integration** with existing healthcare ecosystems

Source: Medisafe Survey 2024

What Are the Biggest Challenges to Implementing AI Solutions in the Digital Health?

● Patients ● Medical Providers ● Digital Health Professionals

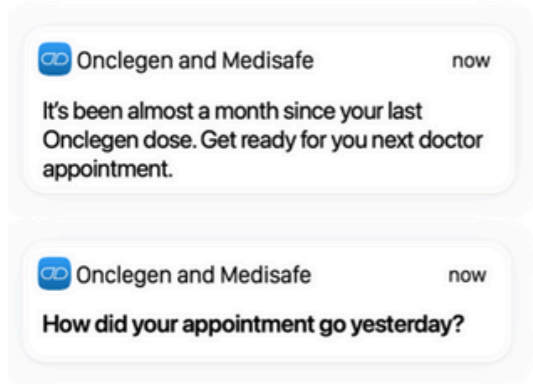


Resistance to change among healthcare providers is among the biggest challenges, according to survey respondents.

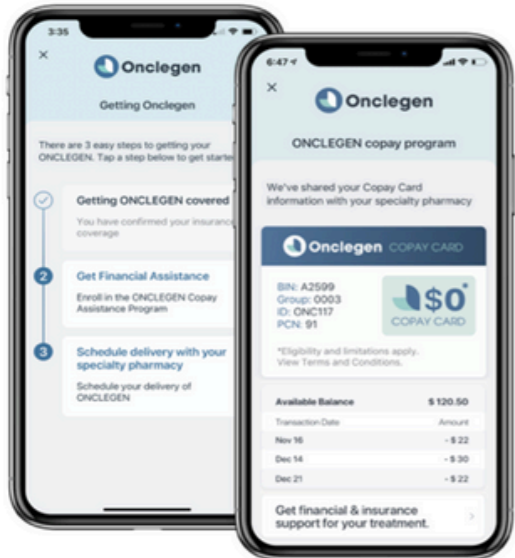
Source: Medisafe Survey 2024

Medisafe: Where Support and Copay Go Digital

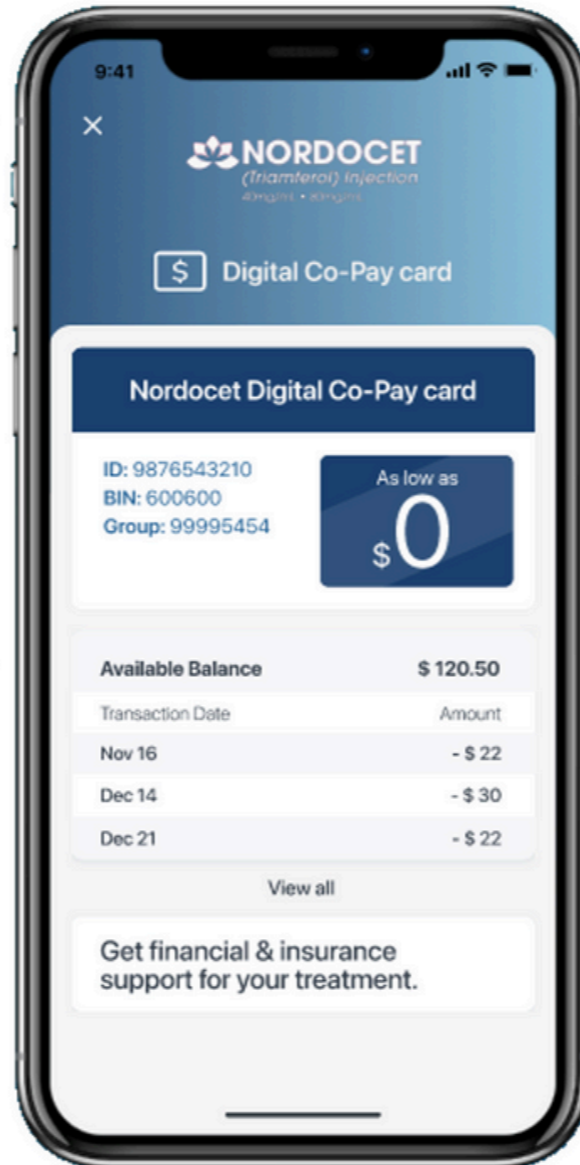
Our partners get a customized, highly-personalized Digital Companion experience in Medisafe to address specific patient journey challenges, from improving first fill rates and first 90 days adherence, to increasing months on therapy and improving Patient Services efficiencies.



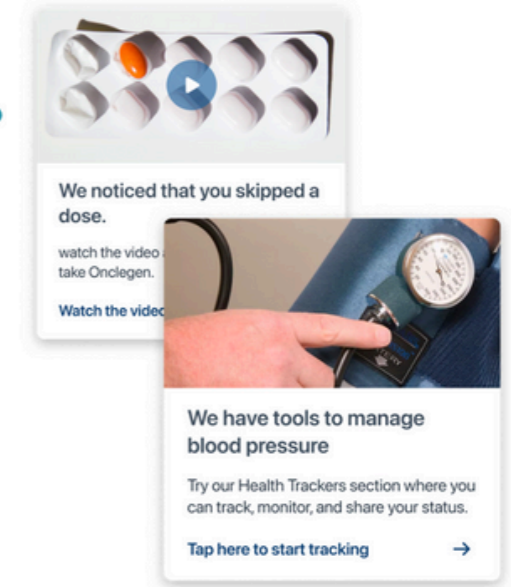
Timely,
Contextual
Notifications



Copay Card,
PA Guidance,
Education



Dynamic
AI-Driven
Content Feed



Human
Patient
Support

Which topic do you want to be contacted about?

- Condition Support
- Financial Guidance
- Medication Assistance



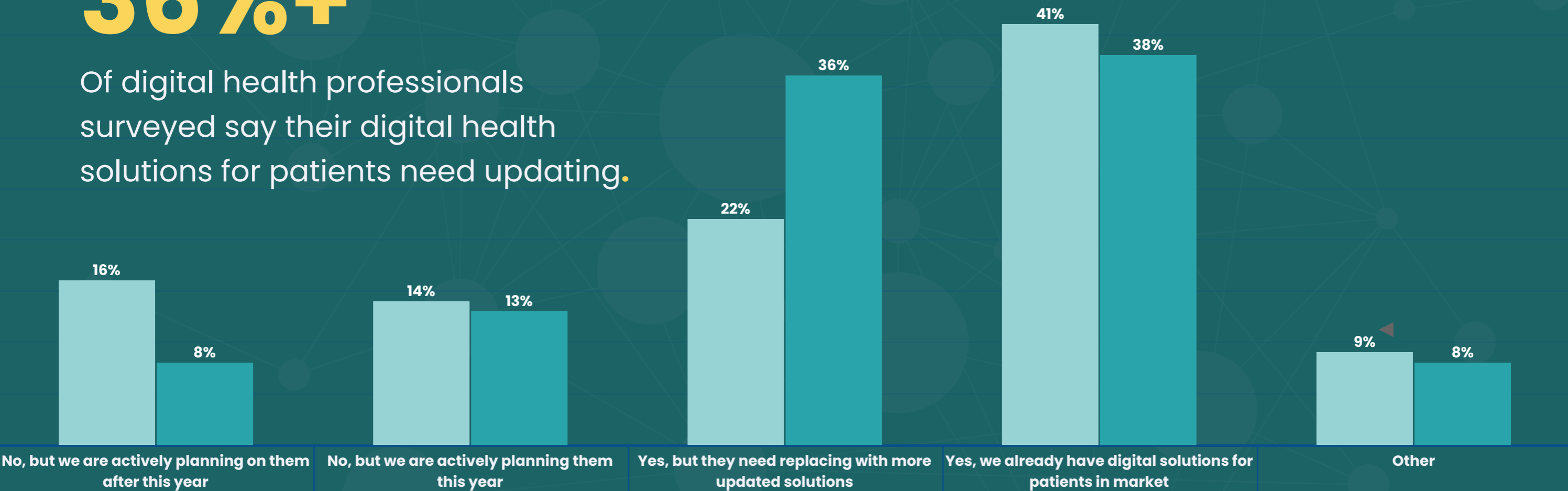
Digital Health Professionals Last Year vs. Now

Does Your Organizaan Plan on Digital Solutions for Patients in 2024?

● 2023 ● 2024

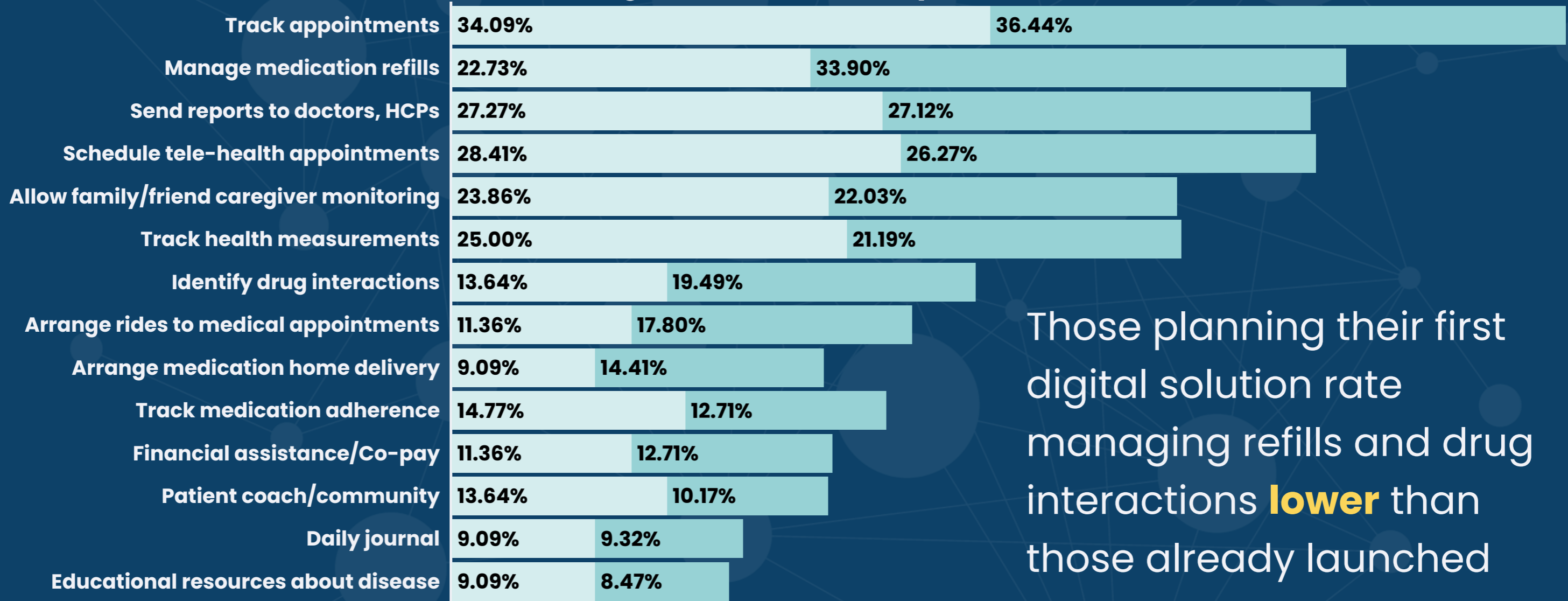
36%+

Of digital health professionals surveyed say their digital health solutions for patients need updating.



Professionals Who Launched Solutions vs Planning One: What Are the Top 3 Benefits that Digital Patient Solutions Should Provide?

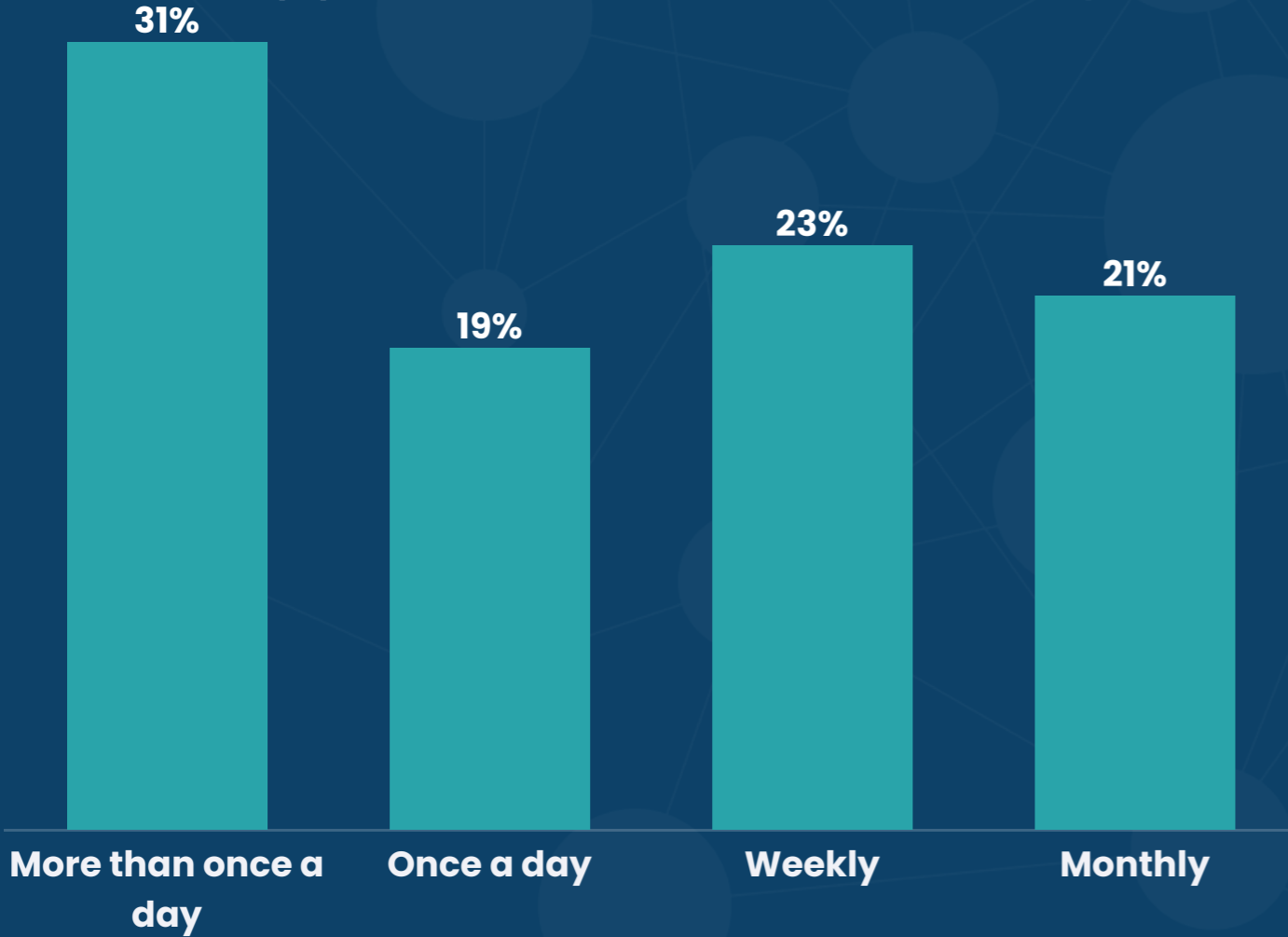
● Planning Their First ● Already Launched



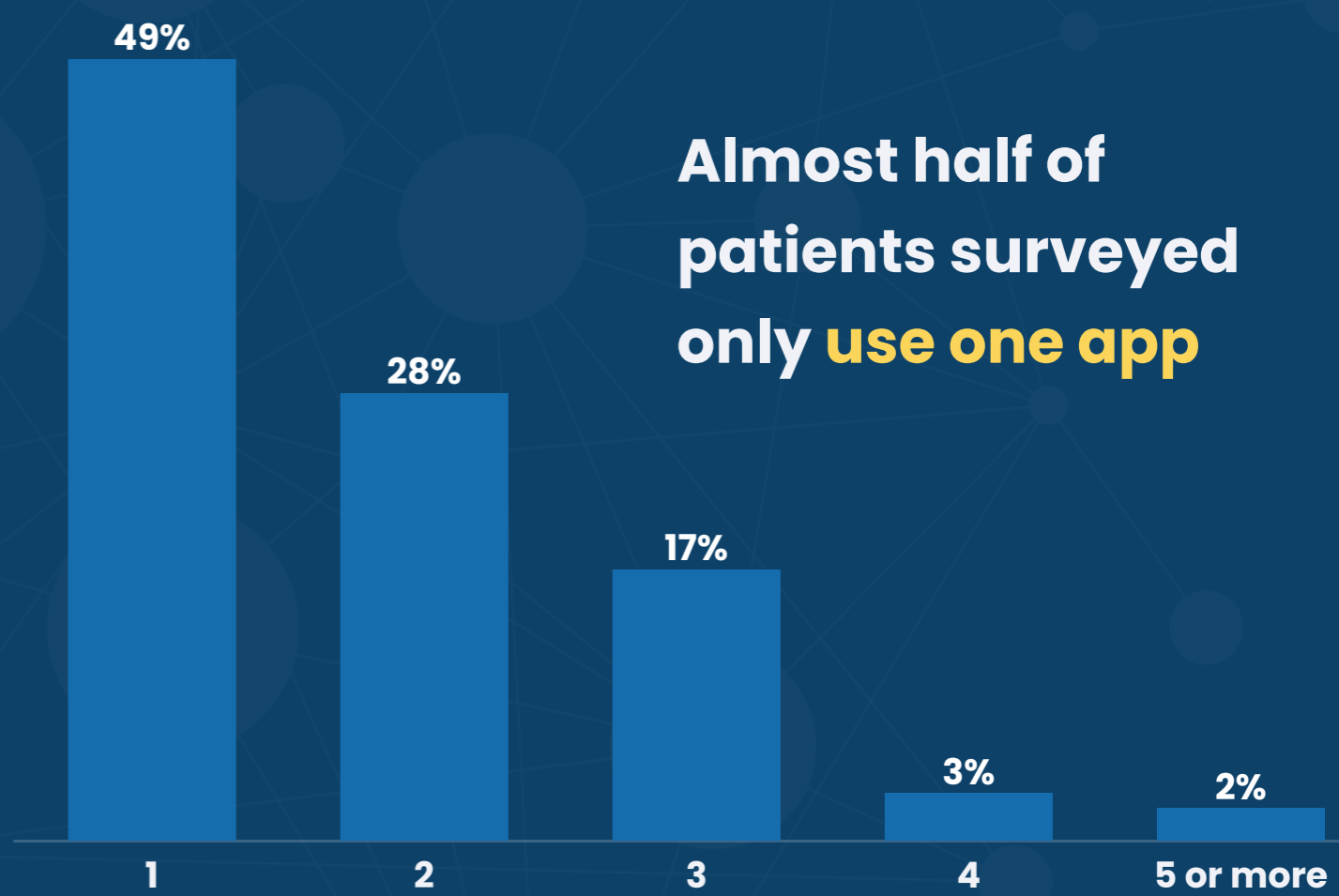
Those planning their first digital solution rate managing refills and drug interactions **lower** than those already launched

More than 50% of Patients Surveyed Say They Use a Health App at Least Once Daily

How Often Do You Use Smartphone Apps for Your Health Journey?



How Many Smartphone Apps Do You Use To Track Your Health Journey?

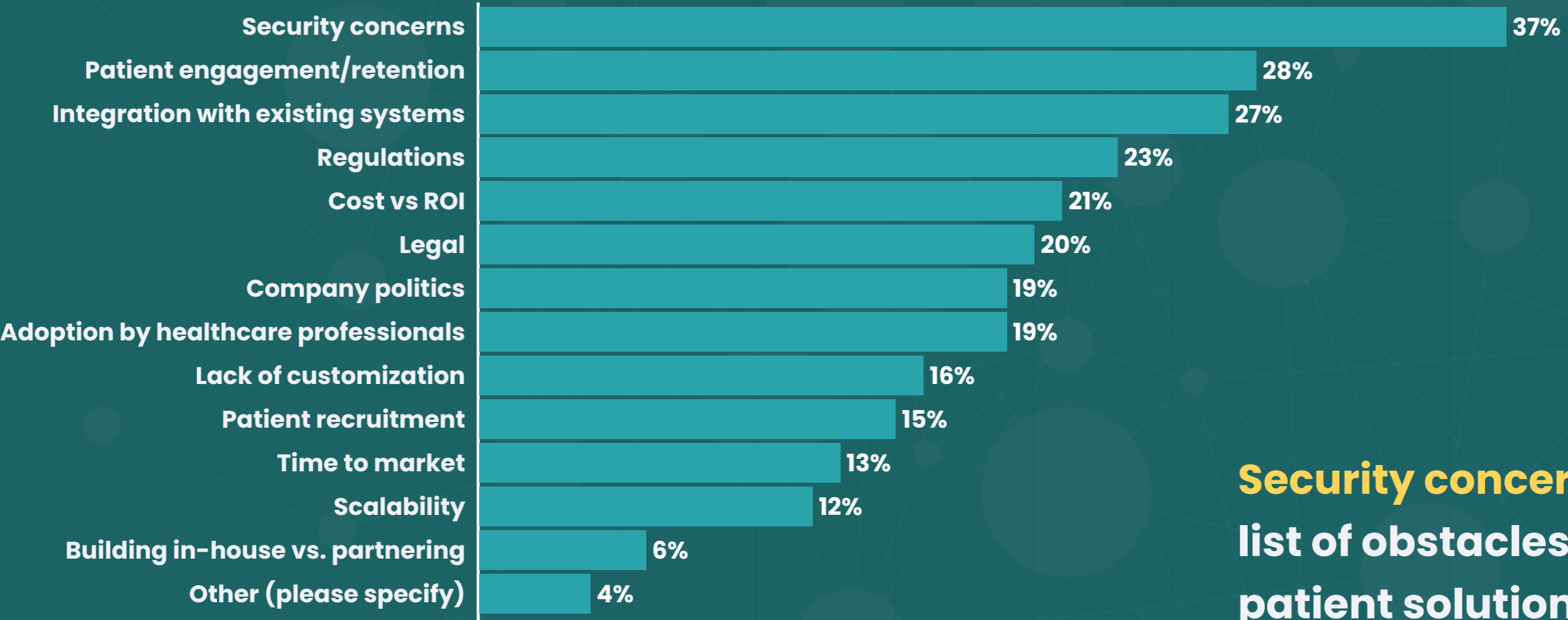


Almost half of patients surveyed only use one app

Source: Medisafe Survey 2024

What Are the Top 3 Obstacles to Successful Digital Patient Solutions?

All Responses 2024



Security concerns top the list of obstacles to digital patient solutions, **except** for respondents **under age 30**.

"People have a bias that says AI is better than humans and it isn't." - Survey Respondent

Source: Medisafe Survey 2024

What are the top obstacles preventing successful digital solutions for patients?

HCPs Say:



37%

Security Concerns



29%

Patient Engagement and retention

Patient Access/Advocates



41%

Patient Engagement and retention



39%

Security Concerns

Digital Professionals Say



36%

Security concerns



36%

Integration with Existing Systems

Planning a Digital Solution for Patients or interested in more data?

Contact Us:

Info@medisafe.com