

HEALTHCARE
DIGITAL
MARKETING
CONSUMER
COMMERCIAL

2018

TRENDS

Syneos Health
Communications



2018:

NEW EXPECTATIONS. NEW OPPORTUNITIES.

What will your brand do?

People's expectations are constantly being reshaped rewired, and remodeled by new and innovative experiences with media, peers, technology and brands.

Brands that don't deliver experiences that meet or exceed these rapidly changing expectations are increasingly being ignored, brushed aside, or deemed irrelevant.

How do we keep pace?

Use the trends changing the landscape to change and accelerate our own thinking.

Trends show us those shifting customer expectations. They reveal data and clues about changing habits and preferences. They uncover brands that are making unique connections and getting to white spaces first.

We use trends to challenge how we go to market and continually innovate every aspect of customer experience.

This year, we worked with more than 250 trend spotters from across the Syneos Health Communications global footprint to identify the shifts most relevant to healthcare marketers. These trend spotters work on the front lines of our business to bring us real-world insight and clues from across the industry and well beyond it.



CONSUMER

Expectations created by media, peers and entertainment



DIGITAL

Behavior changes influenced by technology, tools and devices



MARKETING

Shifts in how brands are earning time, attention and loyalty



HEALTHCARE

New realities in accessing, giving and receiving healthcare

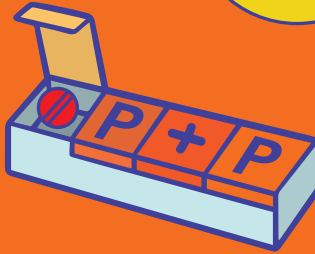
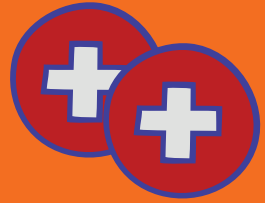
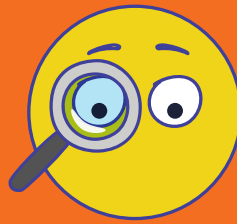


COMMERCIAL

New voices and value equations shaping the market landscape



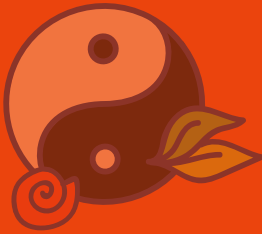
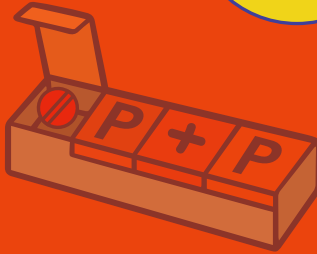
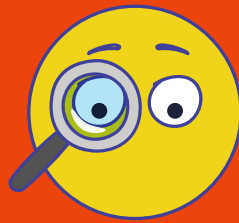
- COLUMBUS
- DALLAS
- LONDON
- MONTREAL
- MUNICH
- NEW YORK
- NEWTOWN
- PHILADELPHIA
- SANTA MONICA
- SARATOGA SPRINGS
- TOKYO
- TORONTO



#living

2018 HEALTHCARE TRENDS

- 01 For the Love of Science
- 02 Women in (Real) Pain
- 03 Doubling Down on Medical Affairs
- 04 Home Delivery
- 05 Teaming Up Pharmacist and Physician
- 06 Living Normal
- 07 War for Drugs
- 08 Reform (and Reinvention) Ready
- 09 Medical Data Deluge
- 10 Accelerating Orphan Response
- 11 Divided Interests
- 12 Alternative to Alternatives
- 13 Dispensable Docs
- 14 Rise of the Illiterati
- 15 experiMental Health



#living

01

FOR THE LOVE OF SCIENCE

In 2018, it's all about showing off your science.

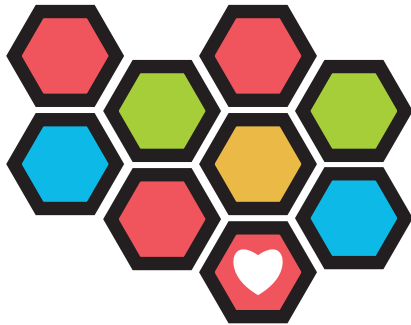
Pharmaceutical innovators will increasingly share their “how it’s made” fascination with consumers, employees and physicians alike. High science or low science; new ground or familiar territory, brands are creating fresh moments of discovery.



CELEBRATING SCIENCE

One of Pfizer's four corporate imperatives is to "earn respect from society." To advance that, they created a campaign called "Before It Was a Medicine," told from the perspective of Pfizer scientists. It shows the inspiration, the numbers and the relentless drive that ultimately led to life-changing innovation. Each spot and video shows the personal stories of both patient and scientist. The campaign went to TV, Instagram, Facebook, Twitter and all over their building. In fact, they wrapped each of their main corporate buildings in the love of science to fuel employee pride. The campaign reached 1.4 billion people via television and 900 million via social channels. The result: a 47 percent change in perception.

[*Cannes Lions Health, 2017*](#)



A YEAR OF NEW SCIENCE

In 2017, The U.S. Food and Drug Administration (FDA) followed its counterparts in Europe and China by approving a new cancer therapy that involves genetically modifying a patient's immune cells. The treatment, Kymriah, is in a new category of CAR-T treatments that the agency is calling "historic." It's just one of many new approaches to cancer that are driving significant public interest in the science behind the innovation. The Internet made consumers arm chair doctors. These advances are driving a new desire to become arm chair scientists.

[*Science Magazine, 2017*](#)





RESURGENCE OF MEDICAL AFFAIRS

As products become more specialized and sophisticated, medical affairs teams are taking on a bigger role in commercialization. MSLs are actively educating on the science, having deeper clinical conversations with HCPs and payers alike. They're filling in the gaps in the sales force and translating "how it works" science to "how it will be used" reality by leveraging both research and social listening to understand real-world application. To get the right science story, brands are activating MSLs earlier: 60 percent report being active at the registration or launch of a drug. One of their newest roles: creating the development story for approval documents to showcase scientific investment.

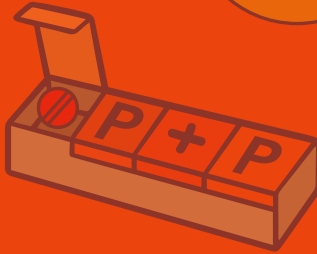
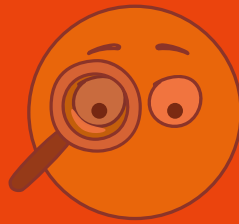
[MM&M / Cutting Edge, 2017](#)

LEARNING IN MINECRAFT

Pfizer combined a love of science with a love of building stuff for kids living with hemophilia. The HEMOCRAFT was developed in partnership with the Entrepreneurial Game Studio at Drexel University, the NHF and other members of the hemophilia community. It lets kids play in the low-fi simulated environment to learn about and track different aspects relevant to their disease.

[Mobihealthnews, 2017](#)





#living

02

WOMEN IN (REAL) PAIN

Women's pain comes into the spotlight with new empathy and new urgency.

Sexism and stereotypes have long led to women's pain being taken less seriously and treated less aggressively. In 2018, new voices and new campaigns are set to radically change that.



PAIN PRESUMPTIONS

A woman's struggle with pain is often met with skepticism by her peers and her healthcare providers. Spencer Kornhaber recently wrote in *The Atlantic*, "It is a documented fact that women tend to report more pain than men — but also that their pain is seen as less credible, with women less likely to be given strong pain relievers, facing inordinately long wait times to be treated, and likely to be told that their problems are mental or emotional rather than physical."

[*The Atlantic*, 2017](#)

LEARNING FROM LADY GAGA

Lady Gaga recently made headlines for postponing her tour due to severe pain. In the Netflix documentary *Gaga: Five Foot Two*, the singer showed us what that pain is really like. It started with a broken hip on the Born This Way Tour in 2013. But it's continued as fibromyalgia, a disorder that is difficult to diagnosis, explain, and treat. In the documentary, she said, "I have chased this pain for five years." Gaga lists off a series of drugs she's taking to cope with the pain. We see her lying face down on a doctor's table with needles protruding from her back, continuing to talk about people who don't believe her pain.

[*Netflix*, 2017](#)





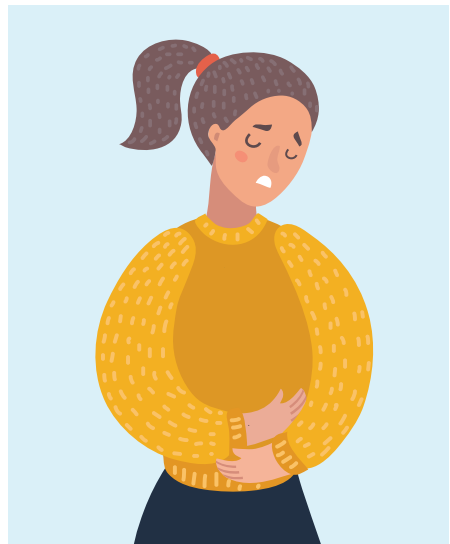
29 STORIES

Lara Parker asked women in the BuzzFeed community to share their own stories about moments when their pain had not been taken seriously by doctors or medical professionals. She ultimately published 29 stories from women who said their pain was ignored, minimized and even “scoffed at.” Many of these women had serious medical conditions that were only later diagnosed by medical professionals who believed their pain and looked for the underlying cause.

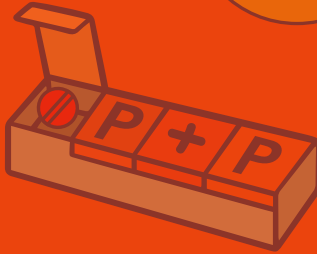
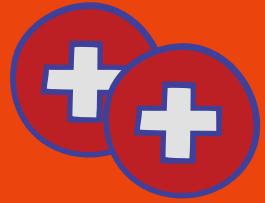
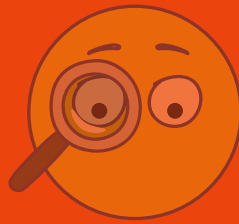
[*BuzzFeed, 2017*](#)

RECOGNIZING ENDOMETRIOSIS

The chronic pain of endometriosis affects one in 10 women, but it can be difficult to diagnosis, often taking up to 10 years to put a name to the pain. AbbVie teamed up with Julianne Hough, a Dancing with the Stars competitor, to create “Get in the know about ME in EndoMEtriosis.” The campaign is focused on helping women recognize the symptoms, which may lead to a timely diagnosis. On MEinEndo.com women can find an endometriosis symptom checklist, a symptom tracker, and other information on the disease.



[*FiercePharma, 2017*](#)



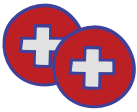
#living

03

DOUBLING DOWN ON MEDICAL AFFAIRS

Medical is the #1 strategic investment of 2018.

The healthcare industry is changing rapidly, and pharmaceutical leaders are looking to their medical organizations to change just as quickly. Look for brands to lead with medical (not reps), shift expectations to create new kinds of partnerships, and fuel a stronger feedback loop from Commercial to Clinical.



FROM TRANSACTIONS TO RELATIONSHIPS

Medical is increasingly seen as a critical strategic investment, one that helps pharmaceutical leaders build lasting value with and for the medical community. Keith Allan, former Medical Director at Novartis, told eyeforpharma, “We are now looking at the medical community as an ongoing strategic investment, a long-term, mutually beneficial partnership, whereas before it was more transactional, more sporadic. The customer base is far broader now, with payers and regulators looking for evidence of the medical, clinical, and economic value of our medicines.”

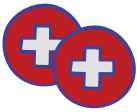
[The Changing Face of Medical Affairs, eyeforpharma, 2016](#)

MORE CUSTOMER-CENTRIC

Medical affairs teams are increasingly investing in more patient- and customer-centricity. They're also spending more face-to-face time with a range of customers from traditional healthcare providers to advocates, insurers, and patients. Kirk Shepard, President of the Medical Affairs Professional Society (MAPS) and formerly Senior Vice President and Head of Global Medical Affairs at Shire, told eyeforpharma, “MA is positioned to bring insights and knowledge into the company at decision points; we've increased the percentage of our Medical people who have a customer-facing role to 80 percent.”

[eyeforpharma, 2017](#)





NEW DATA, NEW ENGAGEMENTS

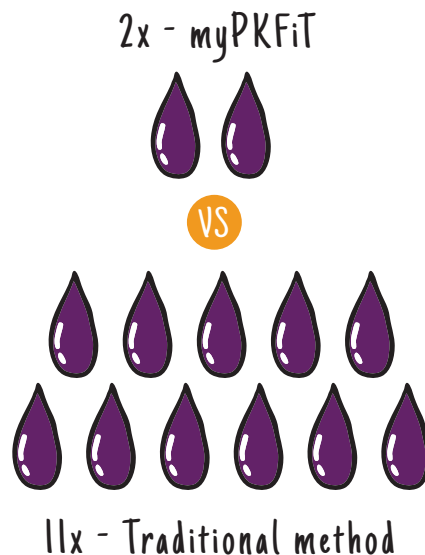
Many medical affairs teams are focusing on how to create and share relevant real-world data. At Baxter, the team is using data to earn more partnerships from KOLs and other professional stakeholders. The three key strategies behind their evolution include listening to stakeholders to understand what kind of data they will value, generating that data in late-stage, patient-focused trials and educating professionals about what Baxter is doing to increase the understanding of disease and treatment.

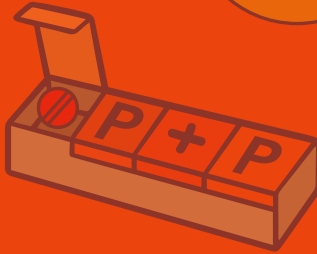
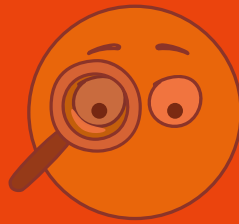
FirstWord, 2017

GOING BEYOND EVIDENCE TO ACTION

Shire's medical team is leveraging digital medicine and data to improve patient outcomes. Its myPKFiT software uses data analytics to reduce the number of blood samples needed to calculate prophylactic medication dosages for hemophilia patients. The software uses existing clinical data to predict patients' pharmacokinetics (PK) curve based on two blood samples instead of eleven. A personalized approach based on PK enables more precise dosing, fewer side effects, and better patient engagement.

eyeforpharma Conference Presentation, 2017





#living

04

HOME DELIVERY

An Rx in '18 is like milk in '78: the best way to get it is to have it conveniently left on your doorstep.

Why go to the pharmacy when the pharmacy could come to you? Innovators big and small are creating new ways to use this gold standard of convenience to improve first fills and long-term adherence.



GET IT NOW

Apps, like NowRx, make it easy for users to upload a prescription, have a video visit with a pharmacist, and schedule delivery to any location of their choosing. But other innovators are taking even more friction out of the system. Capsule, a new kind of pharmacy, allows doctors to order directly for their patients. Once the prescription is logged, Capsule deploys a delivery person to pick it up and deliver it anywhere in New York City within two hours at no extra cost to the patient. They accept all major insurance and copays don't change.

FirstWord, 2017

CVS GOES CURBSIDE

It might not quite be to your door, but it is to theirs. CVS Health has partnered with Curbside, start-up that allows customers to order purchases from an app then pick them up outside the store without ever venturing inside. The pharmacy will be incorporated into Curbside's existing app and will create its own app, CVS Express, which serves up Curbside's experience to CVS customers. The experience is already available in 4,000 stores and has just been integrated into Yelp for additional ease of interaction.

TechCrunch, 2017





AMAZON APPROACHING

The industry has a new reason to buzz about Amazon. In 2017, the company announced plans to hire a general manager for its pharmacy business and said it is mulling the right approach to cracking the complex and regulated market. It recently started selling prescription drugs on its Japanese site, a possible indicator of its broader ambitions. Many are saying the Whole Foods acquisition could point the way. Experts believe the acquisition creates a physical location for needed pharmacy infrastructure.

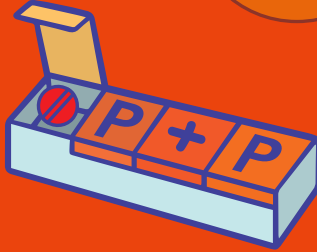
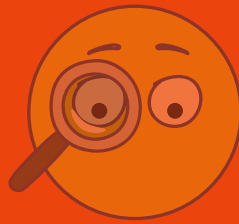
CNBC, 2017

DRIP SERVICE?

Consumers can get more than prescription drugs delivered to their door. Today, they can custom-select an intravenous drip designed to increase their performance. Companies like VitaSquad are offering online ordering of IV therapy solutions to increase recovery time for everything from hangovers to fitness fatigue. The luxury banana bags are administered by professional nurses and promise effects for up to four days.

VitaSquad, 2017





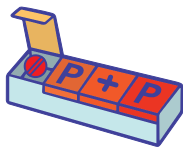
#living

05

TEAMING UP PHARMACIST AND PHYSICIAN

Healthcare is betting big that this partnership can change behavior and deliver bottom-line impact.

From integration at the point of care to interconnected metrics, new collaborations between this duo are creating systems that focus on uncovering preventative possibilities and supporting ongoing adherence.



A NEW MANDATE

The Royal Pharmaceutical Society is one of many important voices setting a new vision for the role and impact pharmacists should have. In one report, they laid out specific recommendations, such as “Pharmacists should shift their focus away from the distribution of medicines towards providing a broader range of services; should see helping people get the most from their medicines and keeping them healthy as their ultimate goal; should take initiative and drive change at the local level — not wait for national solutions.”

Royal Pharmaceutical Society, 2016

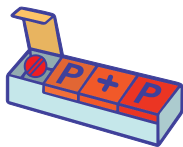
CIGNA AND CVS OFFER NEW BENEFITS

Cigna and CVS are partnering to provide more in-pharmacy care. They recently launched a new program called Cigna Health Works. It will point members to available routine and diagnostic services at CVS Pharmacy and CVS MinuteClinics as part of a suite of benefits designed to give members more control over their healths including discounts on health-related products and enrollment in the payer’s Cigna 90 Now program, which offers 90-day refills for maintenance prescriptions.

HealthPayer Intelligence, 2017

Program Features:

- **Over-The-Counter Discounts**
- **Health Actions When They Matter Most**
- **Convenience At MinuteClinic®**



BALANCING FEAST AND FAMINE



The shortage of primary care physicians and surplus of pharmacists in most markets is one of the key trends driving change. An editorial in the *Specialty Pharmacy Times* said even more pointedly, “[P]harmacists are already in the race for provider status. Not to mention, pharmacists are currently doing point-of-care testing, vaccination shots, and collaborative practice agreements with physicians.” Countries like The Netherlands are proactively preparing for that shift. In their medical schools, pharmacy and MD students overlap for one year of medical training to learn each other’s crafts and perspectives.

[*Specialty Pharmacy Times, 2017*](#)

DOCS SEE FOCUSED VALUE

Primary care doctors have reported high satisfaction with clinical pharmacy services. One study recently asked 144 primary care providers, including 130 with a clinical pharmacist within their primary care practice, about the new partnerships.

Primary care providers reported that pharmacists positively impacted quality of care and said specific types of pharmacy services have the greatest impact on patient care:

38.6% Medication therapy management

29.8% Disease-focused management

11.4% Medication reconciliation

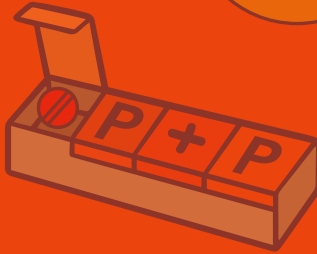
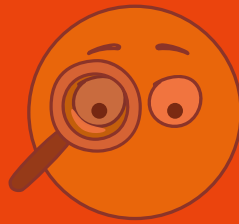
They also said the most valuable disease-focused pharmacy services are:

9.65% Hypertension

58.8% Diabetes

11.4% Pain

[*Truong H, et al, 2017*](#)



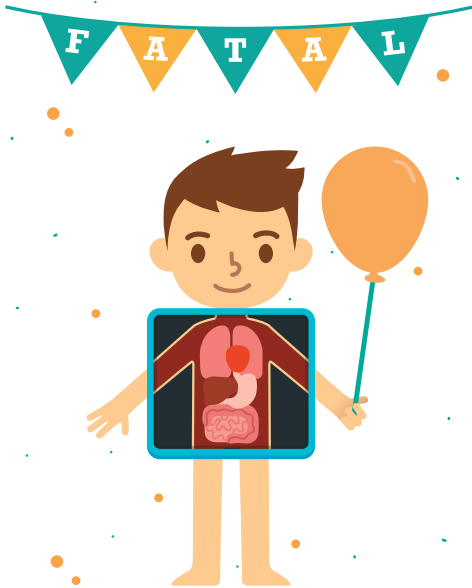
#living

06

LIVING NORMAL

***Today, it's not about living with a disease;
it's just about living.***

A new wave of activists and artists are on a mission to make living with a life-changing diagnosis more commonplace and comfortable. Innovators and brands are joining their fight with new tools and experiences that make it easier to see people, not their illnesses.



LIVING WHILE DYING

Claire Wineland is 20 years old and has lived her entire life with cystic fibrosis. Wineland is on a mission to normalize sickness. She wants to show people how to live while dying and teach the people around them how to better support them. To do that, Wineland has been taking to the stage and the smartphone camera since she was 14 years old. She's published a whole host of videos and posts created as part of what she called her Clarity Project. She told CNN, "What happens when you have an illness where you're never going to be healthy?" Does that mean I'm never going to have a life? Am I never going to do anything or be anything other than a sick kid?"

[*CNN, 2017*](#)

MY MUPPET HAS AUTISM

For the first time in a decade, the classic children's television show Sesame Street introduced a new Muppet, Julia. This character has autism and was created to normalize the traits of autism before children enter school. It can be hard to get Julia's attention. Big Bird had to repeat himself to get her to listen, for example. Julia also has wonderful talents the others don't, like drawing. In the end, she's just one of the gang. Exactly like each child's future classmates will be.

[*Sesame Street, 2017*](#)





FEWER SPECIAL TRICKS

The newest innovations in assistive technologies are working to make access quite a bit easier. One of our favorites is the Kenguru car. It's designed for people who use wheel chairs. Instead of rolling out ramps or folding up wheelchairs, it lets drivers come as they are. The owner simply rolls a wheelchair in from a pop-up back door and drives off using controls that work similar to those of a motorcycle.

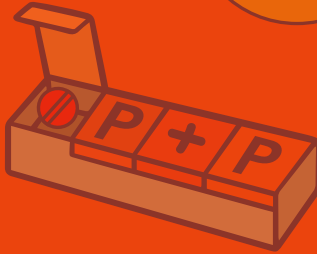
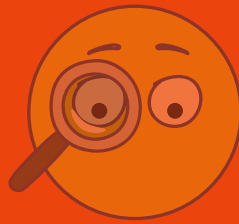
[KD Healthcare Company, 2017](#)

CAFÉ ON A MISSION

Owners Michael and Jennifer Myers opened Sam's Canterbury Café because they wanted to create a meaningful job for their son, Sam, after he graduated from high school. They made a commitment to hiring not just Sam, who is on the autism spectrum, but many adults also on the autism spectrum. Today, more than a third of the staff are people living with autism. The owners have built unique employment training to help the adults on the spectrum learn to be successful in an independent work environment. They also offer training to employees not on the spectrum to help them understand how to best interact.

[Baltimore Sun, 2017](#)





#living

07

WAR FOR DRUGS

*The prescription for 2018 involves
at least a little bit of THC.*

Activists, patients, and innovators are finding new uses for medical marijuana. The results are new laws and new applications that are changing how people live with pain.



29 STATES AND COUNTING

It was just four years ago that Congress passed the Rohrabacher-Farr amendment. In a scant 85 words, it prohibits the Justice Department from spending any federal dollars to prosecute medical marijuana users and sellers. Its passage created radical change in the US, including a multibillion-dollar industry and the freedom of millions to openly partake in its products without fear of federal prosecution. Today, 29 states have legalized marijuana use in some form, most commonly for medicinal purposes. Other states have pending ballot issues on the topic, but the controversy continues as the Rohrabacher-Farr amendment was part of a budget package that is set to expire. US Attorney General Jeff Sessions has been opposed to much of this reform, and in the first week of 2018 he announced plans to reverse the Obama-era guidelines that made this market possible. So the billion-dollar question is, will 2018 bring expansion or new challenges?

[*Los Angeles Times, 2017*](#)

[*CNN, 2018*](#)

CHOOSING COMFORT

The choice of medical marijuana came along when the crescendoing debate about opioids ignited new conversations about the kinds of pain treatment people should expect. One patient, Larry Yolkeson, described his experience to NPR this way, “You name it, and I’ve been on it. Opioids cause the worst constipation — so bad you’ll want to kill yourself. My doctor gave me a (medicinal marijuana) prescription, and I took it that night. I woke up the next morning pain free. I tell everyone it is a miracle, and it saved my life.”

[*NPR, 2017*](#)





SENIOR CUSTOMER

Geriatric physician Benjamin Han of New York University (NYU) studied 47,000 people ages 65 and older. The prevalence of marijuana use — whether medically or recreationally, showed about a 250 percent increase over a seven-year period. Han wrote, “[p]revious generations have had a very low prevalence of using drugs and alcohol. But with the baby boomer generation this is really going to change dramatically.”

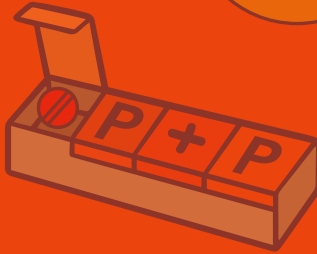
Addiction, journal of the Society for the Study of Addiction, 2016

CANNABINOID PIPELINE

Pharmaceutical innovators like GW and Emerald Health are betting big on cannabinoid science that goes beyond dispensary medical marijuana. GW has researched cannabinoids since 1998, primarily focused on treatments for disorders of the central nervous system (CNS). It has commercialized one drug and has several more in the pipeline. The FDA announced in Q4 2017 that it granted Orphan Drug Designation to Emerald’s lead molecule, EHP-101, for the treatment of systemic scleroderma. More cannabinoid innovation will be ahead in 2018 and beyond.

GW Pharmaceuticals, Emerald Health, 2017





#living

REFORM (AND REINVENTION) READY

Providers have rapidly scaled their response to payment, value, and patient-centric reforms. In 2018, new dynamic delivery systems will push accountability even further.

Industry consolidation and changing sites of care have created a larger, more dynamic and integrated healthcare delivery system. Product selection and decision making that was once made at a local level is now being made at the corporate level with a smaller more powerful group of stakeholders influencing the decision-making.



ANTICIPATING PATIENT OUTCOMES

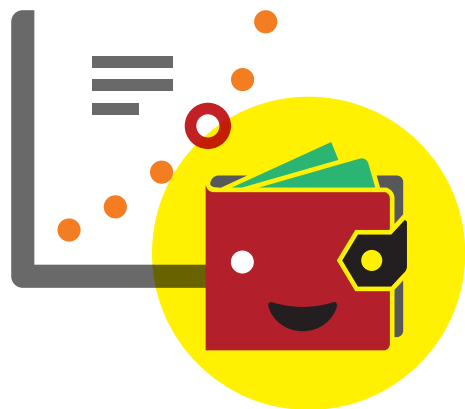
Harvard Pilgrim Health Care (HPHC) is just one of many payers asking for financial guarantees if drugs do not meet anticipated thresholds. This team is also leveraging insights generated from real-world data to better anticipate expected outcomes. They cite using Real World Evidence in three recent cases: observing the lowering of patients' lipids to those seen during clinical trials by tracking the effectiveness of Amgen's Repatha; monitoring hospitalizations for congestive heart failure by tracking the effectiveness of Novartis' heart drug Entresto at reducing readmissions; and evaluating the ability of Eli Lilly's Trulicity to lower HbA1c in diabetic patients.

HarvardPilgrim.org, 2017

TURNING THE TITANIC

In the hopes of righting some of the misaligned incentives in the U.S. healthcare system, the Centers for Medicare & Medicaid Services (CMS) are investing heavily in advanced value-based care models of payment. In 2018, they aim to have more than half of their reimbursements in the form of alternative payment models.

CMS.org, 2017





RETHINKING REIMBURSEMENT IN THE U.S.

According to U.S. healthcare industry experts Drs. David T. Feinberg and Mark B. McClellan, “Alternatives to fee-for-service (FFS) payment are becoming more widespread. The idea is to provide aligned financial support for reforms in healthcare that improve quality and efficiency... For example, many healthcare organizations have found that analyzing current treatment patterns and redesigning care pathways can enable more patients to be more engaged in their care and more effectively treated in outpatient settings or in their home.”

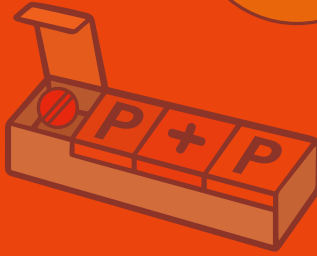
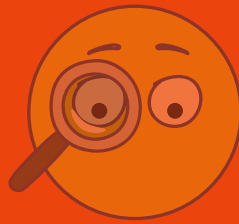
[JAMA, 2017](#)

SPECIALISTS TEAM UP FOR THE FUTURE

Dermatology consolidation is proving particularly active, and investors are buying into the value of aligning specialists to maximize profits. In 2017, Chicago private equity firm Sheridan Capital Partners invested in Dermatologists of Central States (DOCS), a specialty practice management company built around more than 30 affiliated dermatologists in southwest Ohio. These consolidations and affiliations are helping cut costs, improve quality and expand service offerings of these practices.



[www.beckershospitalreview.com, 2017](#)



#living

09

MEDICAL DATA DELUGE

The speed of scientific discovery has left medical insight and knowledge staggering under its own weight.

From huge philanthropic investments to savvy algorithm-based tools, all signs point to breakthroughs in helping scientists break through the noise in research to find just what they're looking for. In 2018, we'll see an explosion of ways for doctors to just keep up.



CHA-CHAN[G]

In 2017, the multibillion dollar philanthropy The Chan Zuckerberg Initiative acquired meta.com in hopes of making progress toward its goal of curing all disease. The start up is built around an AI-powered research search engine, and CZI's cash infusion is enabling the platform to be offered for free to all researchers interested. It's poised to do more than just make life easier for scientists to find the data they need; it will also allow foundations and universities to track where research breakthroughs are happening in real time to adjust resources accordingly.

[Bloomberg, 2017](#)

THOUSAND OF NEW DATA POINTS

Lynda Chin and Greg Satell recently contextualized this challenge in an article called "How Physicians Can Keep Up with the Knowledge Explosion in Medicine" in the Harvard Business Review, "Imagine an oncologist with more than a decade of practice experience is evaluating a lung cancer patient today. During her training years ago, there would have been a handful of therapy options to consider. Today there are dozens of additional options, in addition to hundreds of open clinical trials, each representing a potentially more effective treatment for the patient. Not only does she have to know about these new drugs and the active clinical trials, she also should be up-to-date on all of the published articles in this area so she can understand the science behind each therapy option in order to make the best decisions for her patient." The two offered a range of inventive new solutions, including medical paralegals for every practice.

[HBR, 2016](#)



DOCS DOING IT FOR EACH OTHER

UpToDate employs 6,300 physician authors, editors, and peer reviewers whose only job is to dig through their data. They manually review the most recent medical information and create quick-read synopses for practicing doctors. More than 80 research studies demonstrate their impact on improved patient care and hospital performance.

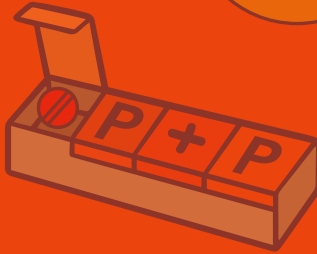
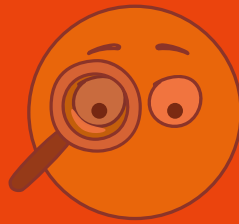
[*UpToDate, 2017*](#)



CAN OLDER DOCTORS KEEP UP?

A number of studies have looked at how the age of a doctor can affect outcomes. One led by Dr. Anupam Jena of Harvard Medical School looked at a random sample of Medicare data for more than 700,000 hospital admissions from 2011 to 2014. The patients were treated by whichever physicians happened to be on duty at the time of their admission. When the team looked up the ages of the nearly 19,000 doctors involved, they found the older the doctor, the higher the patient mortality rate. For physicians under the age of 40, patients' mortality rate was 10.8 percent. That edged up to just over 11 percent for patients treated by doctors in their 40s. The patient mortality rate was 11.3 percent for physicians aged 50-59, and rose above 12 percent for physicians over 60. Jena explained, "there's a fear that as doctors get further away from residency, they might be out of touch with new technologies and treatments."

[*BMJ, 2017*](#)



#living

ACCELERATING ORPHAN RESPONSE

***In 2018, call rare diseases anything but “small.”
All eyes are on them for both molecular and
marketing innovation.***

The FDA built fast tracks. Pharma built a pipeline. The sales force created a data grid. Together, healthcare is “all in” on both developing new rare disease treatments and quickly getting them to the people who need them most.



800 leaders in orphan drugs



38 countries



135 presentations

COME TOGETHER, RIGHT NOW

Since it started in 2011, the World Orphan Drug Conference (WODC) USA has grown leaps and bounds. Its attendance has more than quintupled, growing from a small assembly of 150 attendees focused on policy, regulatory pathways, and proper incentives to “a global gathering of more than 800 leaders in orphan drugs from 38 countries, and more than 135 presentations covering all aspects of orphan drug development and rare disease research.”

[WODC Website, 2017](#)

SMALLER POPULATIONS DRIVING BIGGER SALES

In 2016, global sales of orphan drugs accounted for 16 percent of all prescription drug revenues with well over \$100 billion in annual sales. By 2022, prescription revenues for rare disease are projected to exceed \$200 billion and grow to account for more than one-fifth of the overall market.

[Financial Times, 2017](#)





INVESTING IN RARE DISEASES MAKES CENTS

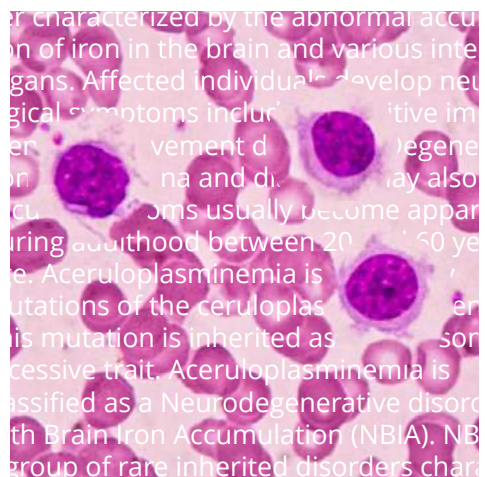
The World Health Organization (WHO) defines “rare diseases” as those affecting less than five in every 10,000 people, while the U.S. Food and Drug Administration (FDA) uses the term “orphan diseases” for those affecting less than 200,000 in the United States. Regardless of what you choose to call them, they are a big opportunity for many life science companies. With less competition, few existing treatments, and a high correlation with long-term treatment needs, Mitchell Ng, the principal partner of Life Science Sector investment fund Thesalus, notes that, “Smart investors should focus on pharma companies with specialty drugs for orphan diseases in the pipeline, regardless of market capitalization; these have greatest future revenue potential.”

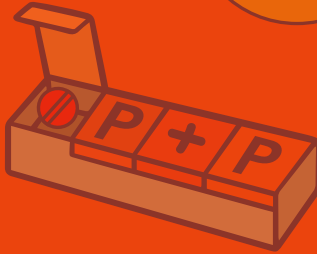
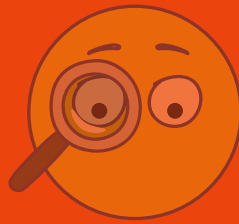
[Forbes.com, 2017](#)

CLOSING THE LOOP TO IDENTIFY RARE DISEASE

Alynlyam Pharmaceuticals has developed an Integrated Customer-Patient Data Driven Approach that uses claims data and lab results to help HCPs identify rare diseases. They aggregate the licensed claims data of more than 250 million lives together with lab results that show which practices are testing for symptoms like the ones in the rare diseases their drugs treat. Artificial intelligence integrates and investigates that data to identify possible diagnoses or disease accelerations. The team can use that targeted specific data to direct field and nonpersonal activity just when practices most need the support.

[eyeforpharma, 2017](#)





#living

DIVIDED INTERESTS

The merging of PBMs with pharmacies is threatening to shift the focus of front line pharmacy staff.

Specialty pharmacy used to be aligned with the interests of patients and physicians: get people on drug; keep people on drug. Early reports show that shifting with new payer involvement. Consumer-driven ratings can stand in the gap — but potentially only for engaged patients.



A CRITICAL SHIFT IN POWER

Consolidations and M&A activity have created healthcare mega insurers. Today, just three pharmacy benefit manager companies — Express Scripts, CVS, and Optum — handle 75 percent of all prescription claims. The parent companies of these PBMs have also gotten into the \$100 billion specialty pharmacy market. In 2007, zero percent of specialty prescriptions went through payer-owned specialty pharmacies. Today, that number is 60 percent and climbing.

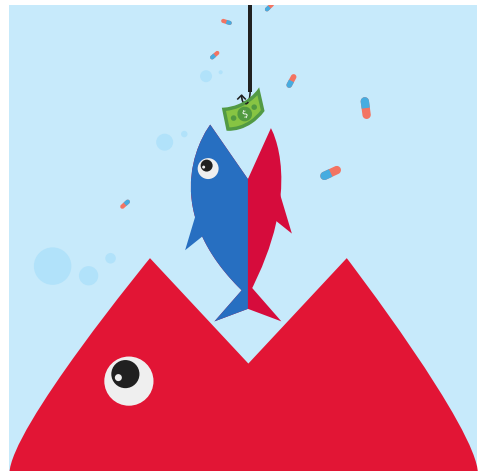
[The New York Times, 2017](#)

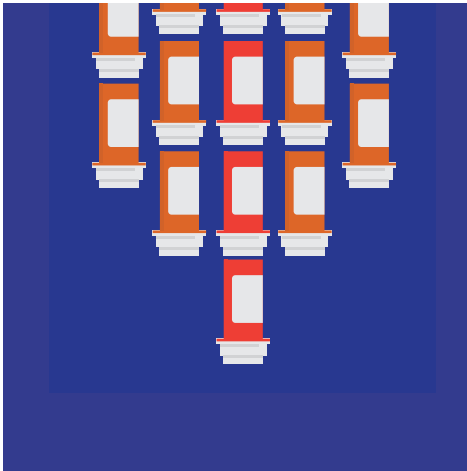
[inVentiv Health, 2017](#)

DEALS KEEP COMING

As consolidation in the industry continues to grow, other PBMs and pharmacies are likely to be teamed up in large, complex organizations. The recent Rite Aid and Walgreen deal (since rescinded) set up an intriguing rivalry. Quartz explained that “[b]uried inside Rite Aid is a bundle of pharmacy benefit managers (PBMs). These are companies that handle the distribution of drugs for large employers, insurance companies, and government programs like Medicare. Walgreens says that acquiring Rite Aid’s PBMs would help it compete with archrival CVS, which controls a large and extremely profitable PBM called Caremark.” CVS also is now set to be fully integrated with mega insurer Aetna.

[Quartz, 2017](#)





SPECIALTY IS OUTPACING

While growth of traditional medicines has remained largely flat, the specialty market is in a time of dynamic growth and innovation. A recent study from IMS Health found that the specialty growth rate is 23 percent, compared with 7.8 percent in traditional medicines. Overall, specialty drugs account for 36 percent of all spending (and growing).

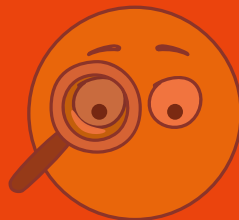
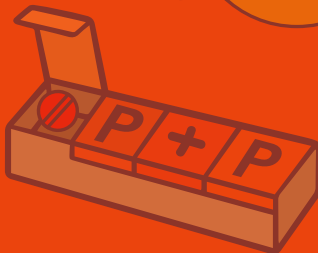
IMSHealth.com, 2016

HOSPITALS WILL BE NEXT

It's not just PBMs and insurers who are interested in the specialty pharmacy business. Hospitals are increasingly entering the market. Factors motivating the shift included a desire to provide more integrated, comprehensive care; best meet Accountable Care Organization (ACO) integration principles; and create new revenue streams. A recent survey of the American Society of Health-System Pharmacists found that while only 8.7 percent of all hospitals had a specialty pharmacy operation, larger hospitals were much more likely to have a specialty pharmacy. Nearly half (47.1 percent) of the hospitals with more than 600 beds operated a specialty pharmacy.

[wwASHP survey results, 2017](#)



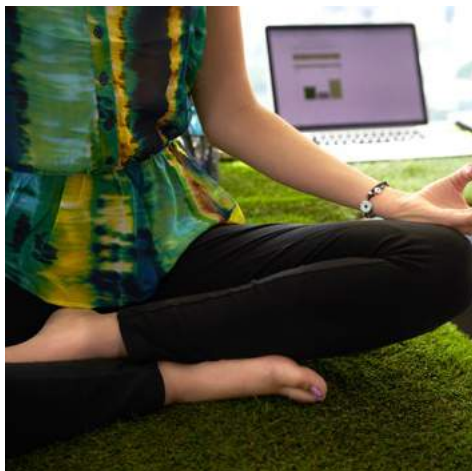


#living

ALTERNATIVE TO ALTERNATIVES

The debate about unorthodox treatments is changing this year from could it work to will it hurt?

In 2018, the rumblings of criticism about untested alternative treatments and therapies will reach a crescendo of backlash from healthcare providers and patient advocates alike. Wellness claims will continue to rise, but so will scrutiny of the impact and science.



WELLNESS EVERYWHERE

The average town square was once home to a bakery, grocery, and hair stylist. Now it's a SoulCycle, juice press, and meditation coach. Wellness and alternatives are everywhere from the Wellery in Saks Fifth Avenue stores to in-office yoga and sleep pods at JP Morgan Chase to complete complementary care suites in leading hospitals. In Germany, homeopathic alternatives are not only covered costs — they're often a prescribed part of care.

[*PLOS, et al, 2017*](#)

PHYSICIAN FRUSTRATION

Doctors have long accepted alternatives as part of patients' self-care, but the newest trends are pushing them too far. In one memorable editorial, a Toronto-based OB-GYN took on Gwyneth Paltrow's *The Goop* this way: "Your goopshit bothers me because it affects my patients. They read your crackpot theories and they stop eating tomatoes or haven't had a slice of bread for two years, they spend money on organic tampons they don't need, they ask for unindicted testing for adrenal fatigue (and often pay a lot via copayments or paying out-of-pocket), or they obsess that they have systemic Candida (they don't)."

[*Huffington Post, 2017*](#)





NEW DEMAND FOR CLARITY

In Germany, three cancer patients died in June 2016, shortly after they had sought untested alternative treatments from a curative practitioner in Bruges-Bracht. The resulting public outrage has led an expert group called the “Münster Circle” to propose comprehensive reform of the medical practitioners called naturopaths, saying they give patients the wrong impression that doctors and alternative practitioners are alternative alternatives.

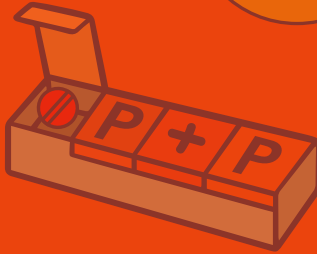
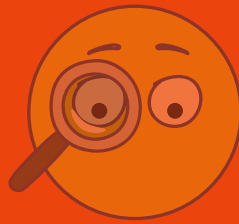
[Speigel, 2017](#)

COULD PHARMA BRIDGE THE GAP?

Pharmaceutical brands are increasingly packaging right-sized self and complementary care with tested treatments and devices. Diabetes device companies like Livongo, Telcare, and iHealth package lifestyle support services with their glucose meters. Novo Nordisk offers a complete Cornerstones4Care program to support its insulin brands. Now, Conde Nast is offering pharma partners even more opportunities to talk about health and wellness. Brands can now partner with the publisher to co-create custom content to be targeted and delivered across their 100 million reader portfolio.

[WWD, 2017](#)





#living

DISPENSABLE DOCS

Why wait for your family physician when any doctor will do?

Patients are hopping to new points of care for shorter wait times, new approaches to treatment, or even just someone who shares their opinion. Even the most loyal patient segments are piecing together care from across multiple practices. Hospitals and providers are trying new ways to establish relationships, including using the voice of their patients.



MOST LOYAL ARE NOT SO LOYAL

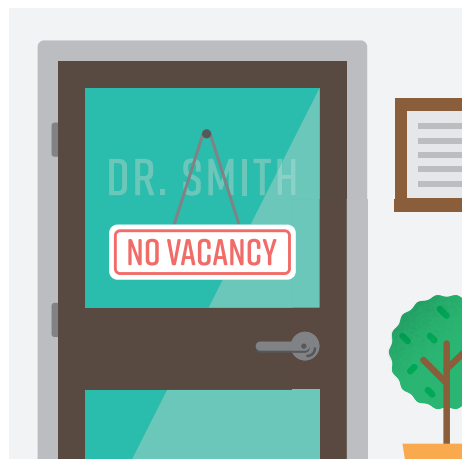
Over five years, Medicare participants interact with an average of 2.8 distinct healthcare systems. This segment has long been considered to be one of the most loyal, but today 80 percent seek 30 percent of their care outside their “home system.” That represents \$11,000 in healthcare costs on average.

[Advisory.com, Innovation Center, 2017](#)

NO VACANCY

Long wait times to book an appointment with a specialist or chosen general practitioner are leading many patients to say “any doctor will do.” In the U.K., one million people are unable to get appointments with GPs in a given week. The NHS says these are the longest waits on record, representing 47 million occasions when patients attempted but failed to secure help from their GP, forcing them to give up, try again later, or turn to Accident and Emergency departments.

[The Telegraph, 2017](#)





AGREE WITH ME

For some, the second opinion they're looking for is one that agrees with their online health sleuthing. David Epstein of ProPublica recently covered new trends in what patients demand from their physicians. He wrote, "While he was waiting in the emergency department, the executive took out his phone and searched 'treatment of coronary artery disease.' He immediately found information from medical journals that said medications, like aspirin and blood-pressure-lowering drugs, should be the first line of treatment. The man was an unusually self-possessed patient, so he asked the cardiologist about what he had found. The cardiologist was dismissive and told the man to 'do more research.' Unsatisfied, the man declined to have the angiogram and consulted his primary-care doctor."

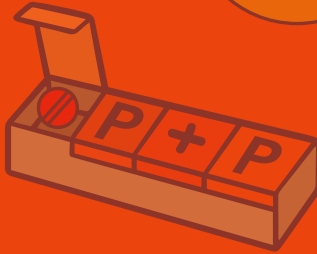
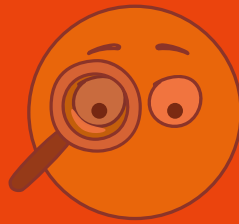
[*ProPublica and The Atlantic, 2017*](#)

COULD PHARMA BRIDGE THE GAP?

Many hospitals, including the University of Utah, solicit patient reviews to help consumers learn from each other and keep customer feedback at the center of their organization. The system's Dr. A. Lorris Betz told *Stat News*, "We now get, and post, roughly 100,000 reviews a year that are directed toward our physicians and their teams." That feedback has helped them improve almost every aspect of care from reducing the handoff of patients from one provider to another to reducing clinic wait times to helping admitted patients get a better night sleep.

[*Vivian S Lee, The Stat, 2017*](#)





#living

THE RISE OF THE ILLITERATI

What happens when healthcare illiteracy is compounded with digital naiveté? A whole new segment of left behind patients who need just-for-them interventions and support.

Smart brands are finding new ways to bridge this health-literacy gap and connect struggling patients with the accessible tools they need to meet them where they are.



Blah Blah **Insulin**,
Blah Blah Blah Blah,
Blah, **Diabetes**, Blah Blah
Blood Glucose Levels,
Blah Blah.

DOUBLE NEGATIVE

According to research out of the University of Texas, around half of adult Americans demonstrate low health literacy, while struggling to find and use health info. This stat is particularly troubling because the study showed that this healthcare illiteracy is associated with overall poorer health and specific negative health outcomes. Additionally, these issues are compounded in this digital age as tech-challenged patients are doubly impacted when Health Information Technology (HIT), including digital portals, wearable tech, and mobile apps, enter the fray.

[*Journal of Medical Internet Research, 2017*](#)

MIRRORING ACROSS THE POND

In the U.K., the news is either slightly better, or slightly worse, depending on the angle. Forty-three percent of adults in Britain struggle to grasp the health info given to them. But once you throw numbers in the mix like A1Cs and O2 Sats the illiteracy climbs to 61 percent. That means that the majority of Brits are unequipped to handle even the basic information they need to combat and overcome their ailments.

[*PharmaPhorum.com, 2017*](#)





3 important questions to ask at every visit:

- 1 What's my main problem?
- 2 What do I need to do?
- 3 Why is it important for me to do this?

CHANGING THE CONVERSATION

Pfizer is working to shine light on the need for greater health literacy and bring the conversation to the right people. The company has a site dedicated to providing tools and resources to patients (and their family and friends), healthcare professionals, and policy makers. It channels the right information, statistics and thought leadership to each audience, and connects each group with the tools they need to succeed.

Pfizer.com/Health/Literacy, 2017

SPEAKING FLUENT "PATIENT"

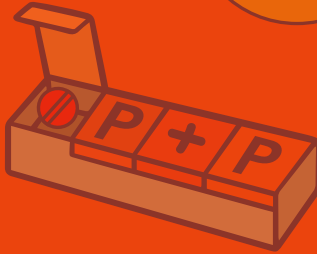
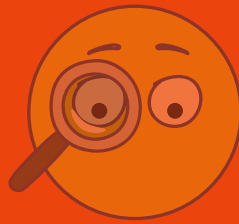
Bristol-Myers Squibb has developed a Universal Patient Language to help communicate complex topics to patients. The "UPL" addresses widely voiced concerns among consumers and healthcare advocates that communications about medicines are not designed for an optimal patient experience. It's an open source project that engaged patients, caregivers, and advocates for more than two years to co-create new principles and tools designed to change how our industry talks to patients and caregivers to, ultimately, better foster learning.

UPL.com, 2017

TAKE
WITH WATER

IS THAT A
SIP, GULP
OR A FULL GLASS?





#living

15

EXPERIMENTAL HEALTH

From pop culture stars to princes to programmers to public policy wonks, everyone seems to be talking about improving mental health and well-being.

Brands both inside and outside of healthcare are developing creative new ways to destigmatize these disorders and use facts to weed out fiction. In 2018, look for revolutionary new support and solves to take center stage.



POUNDS FOR PROGRESS

In 2017, the U.K.'s National Health Service (NHS) announced expanded funding for mental health, investing £35 million in seven mental health trusts. They have been given marching orders to “trail blaze” new digital services for patients and become “Global Digital Exemplars for Mental Health.” These trusts aim to develop mobile tools for patients that allow them to better manage their illnesses, engage family and friends for additional support, and improve their healthcare professionals’ mobile access to their patients’ real-time records.

PharmaTimes.com, 2017.

A MOBILE THERAPY SESSION

Talkspace, the cross-platform digital therapy tool, made headlines again in 2017 on several fronts. First, the platform is building serious momentum and bringing the mental health benefits of talk therapy to new audiences. With more than half a million users, it's remarkable that more than half have never sought traditional therapy. Additionally, the interface makes it uniquely positioned to address mental health needs emerging from our digital world—the company now offers a three-month Social Media Dependency program focused on helping people overcome depression and self-image issues brought on by digital peer pressure.

[AdWeek](http://AdWeek.com), 2017.





SHOW AND TELL

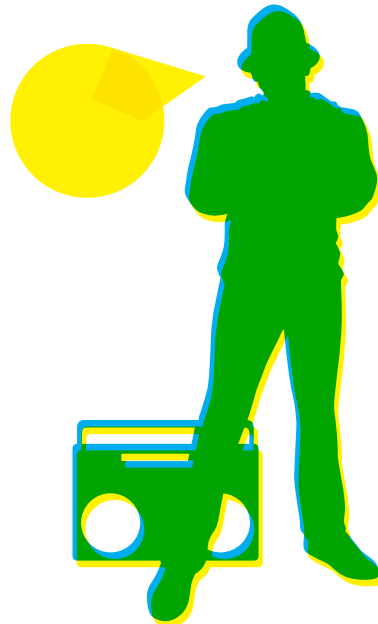


According to a 2017 article from the American Psychiatric Association, “The ways we show and talk about mental health [in media] can help reduce stigma if done carefully.” While this rings true, the APA also warns that the inverse is also fact. Personifying misguided mental health stereotypes across TV, film, and other media can have devastating consequences to a society’s acceptance and support of those struggling with mental health issues. With one in five adults struggling with a mental health disorder in any given year, leveraging media to advance mental health is more important than ever.

[American Psychiatric Association, 2017](#)

HIP-HOP SESSIONS

Viceland’s *The Therapist* show made headlines in 2017 by breaking down both the cultural and racial stereotypes that can get in the way of seeking help for mental health issues. Rappers and hip-hop artists including Ice Cube and Eminem have historically thrown shade at seeking counseling for the trauma of “gangsta” life in their lyrics, but this year the show featured host Dr. Siri Sat Nam sitting down with several rappers, including the late, great New York artist Prodigy to flip the script on seeking help for mental health. Even the master Jay-Z himself has become vocal in sharing the help that therapy has afforded him in his verse.



[Pitchfork.com, 2017](#)

CONTRIBUTORS TO THIS REPORT:

Abbie Lade	Christian Wasmer	Jared Davis	Keith Ruark
Abby Protopapas	Christopher Brixey	Jason Buchel	Kelley Kaufman
Adam Lemke	Chris Cummings	Jason Ferguson	Kelli Hallett
Adam Michiels	Claire Gilak	Jason Meggs	Kelly Gratz
AJ Triano	Claire Nishioka	Jeanine O’Kane	Kevin Coleman
Alex Brock	Craig Porter	Jeff Brodscholl	Kim Johnson
Allison Murphy	Dan Bunce	Jeff Eaton	Kristen Spensieri
Amanda Grieco	Dan Connelly	Jeff Giermek*	Kristina Diaz
Amanda Loban*	Dan Cummings	Jemma Contreras	Kurt Hawtin
Amanda Marglitch	Dan Ferreira	Jen Hunter	Lauren Ankeles
Ami Yu	Dan Zaret	Jennifer Bonito	Lauren Selikoff
Amy Hutnik	Daniel Schäfer	Jennifer Fleishman	Leah Warner
Amy Liverman	Danielle Bedard	Jennifer Moses	Leigh Householder*
Amy Tsai	Danielle Burrick	Jeremy Rosario	Leslie Isenegger
Andreas Reinbolz	Dave Querry	Jessica Kahan	Linda Adams*
Andy Ault	David Hepler	Jessica Parkes	Lindsay Cohen
Angela Mitchell	Deborah Kazenelson	Jessie Katzbeck	Lindsey Wilcox
Ann Manousos	Denise Adams	Jim Mittler	Lisa Arbogast
Anna Khersonsky	Diane Condon	Jim Rotsart	Lisa Stockman
Barrie Pendsay	Diane Turek Pire	Jim Smith	Lisa Waters
Barry Brandstetter	Drew Beck*	Joanna Rainbow	Lizzy Guterma
Becca Thomas	Drew Glenn*	Joe Daley	Lulu Richards
Ben Curits	Duncan Arbour*	Joe Immen	Lydia Strohmeier
Bob Taylor*	Elle Hamilton	John Bye	Lyndsay MacFeeters
Brad Rodstrom	Ellen McCarthy	John Catania	Lysa Shaw
Brandon Eldredge	Emily Rhodes	Jonathan Cogan	Maddie Rounds
Brandon Morse	Eric Delnicki	Jonathan Ehrlich	Malorie Kelly
Brian Chavez	Erica Chiao	Jordan McLaughlin	Manuela Fastner
Brian Simpson	Eva Straßburger	Juli Cavnar	Marah Oberfield
Brianna Wilkoff	Gabriel Sterne	Julie Adrian	Marcos Mendell
Bryan Distefano	Gia Seymour	Julie Dorst	Marie Emms
Bryan Katz	Grace Valastro*	Kaitlin Perez	Mark Dmytruk
Bryan Murphy	Halen Dang	Karen Elford	Mark Jazvac
Bryan Roman	Hannah Robinson	Karen Kopp	Mark McCoy
Campbell Hooper	Heather Gray	Karen Sanford	Mark Vuchenich
Carly DelPiano	Hitu Malhotra*	Karen White	Markus Muehl
Carly McLean	Holly Byrd	Kathleen Starr	Martina Schwarzkopf
Cary Whitt	Howard Brock	Kathryn Strausser	Matt Merlin
Celeste Mosby	Jackie Krieger	Kaydee Blinn	Matthew Howes
Chris Baker	Jackson Carroll	Keith Kelly	Matthew Young
Chris Casey	Jane Winter	Keith Morris	Meg Alexander

* EDITORIAL TEAM

Meghan Terwilliger	Raffaella Facchini	Theresa Mühlthaler
Meredith Young	Raisa Reza	Tipp Nelson
Michael Collinson	Ram Gopalakrishnan	Todd Henwood
Michael Eder	Rebecca Terranova	Tom Albers
Michael Field	Renato Luis	Tom Carey
Michael Iacoveillo	Rich Baptista	Tom Perkins
Michael Kehlmeier	Rich D'Ginto	Tom Principe
Michael Kotevich	Rich Gorman	Tony Lanzone
Michael Skovira	Richard Wong	Tony Xu
Michele Arini	Rob Parsons	Ty Bailey
Mike Bell	Robert Defino	Tyson Smith
Mike Corn	Robert Evangelista	Vanessa Rivera
Mike Menta	Robert	Veronica Karingada
Mike Ryan	Wojciechowski	Vince Ng
Mike Sheehan	Roberto Giannattasio	Wendy Jacobs
Mike Titon	Robin Jones	Will Dawson
Nadine Goeritz	Rodney Sexton	Yvonne Ash
Nancy Feiner	Rohit Sood	
Naseem Allaf	Rose Anna	
Natasha Watzka	Kaczmarcik	
Nathaniel Hayes	Ryan Maglione	
Neall Currie	Sam Cannizzaro	
Nick Murphy	Sam Ying	
Nick Salter	Scott Elliso	
Nick Willhoft	Scott Hohman	
Nicole Beckstrand	Sebastian Bather	
Nikki Mans	Shirley Mao	
Nikki Tzanopoulos	Simone Lemelle	
Nori Kaiser	Sonja Foster-Storch	
Pankaj Bhalla	Sonya Joshi	
Pat Leary	Stacy Hall	
Pat Wilczynski	Stephanie Bukantz	
Patrick Bishop	Stephanie Crooks	
Patrick Fulmer	Steve Toman	
Patrick Manhard	Steven Rupiper	
Patty Holmes	Susan Ly	
Paul Mignon	Susan Suponic	
Paul O'Neill	Susannah Amiteye	
Paul Zimmer	Tanya Jishi	
Phillip Reynolds	Tasia Dedenbach	
Rachel Lipsitz	Teddy Wong	



In today's complex healthcare environment, great ideas alone aren't enough to bring brands to dominance. They need to be tested in the fire of the real world; honed by the people who know the molecules better than anyone; delivered by those who truly understand what your product can become.

Syneos Health Communications is the only healthcare communications network that is part of a company on the front lines of healthcare. We work where your ideas need to work.

Trends help us create experiences that beat channel benchmarks, that raise expectations, and ultimately help us meet the metric that matters most: engaging more people in critical conversations about the changing possibilities of healthcare.

To download all 2018 trend reports,
go to: trends.health

CONTACT:

Leigh Householder

Managing Director, Innovation

leigh.householder@syneoshealth.com

