

# Is the patient voice truly valued?

Patients speak for only 92 seconds during the typical specialist visit.



Themes of patient centricity, valuing the patient voice, and making patients partners have received a great amount of recent attention across the healthcare and pharmaceutical industries. Many recent whitepapers, conferences, and discussions have focused on these topics, and the theme of ASCO's 2023 Annual Meeting was "Partnering With Patients: The Cornerstone of Cancer Care and Research."

While patient centricity can provide benefits across many facets of drug development and patient care, the place where patients can have the largest impact on their own health is often in the doctor's office, conversing with their treating physician. To assess the impact of the healthcare industry's focus on patient centricity on actual treatment practices, ZoomRx has recorded and analyzed over 500 real-world treatment conversations between HCPs and patients, across 10 therapeutic areas (TAs).

This analysis reveals that the healthcare industry is still far away from making patient centricity a reality. Tellingly, the patient voice is heard for only 92 seconds in the average real-world specialist visit.

## Limited time leads to shorter conversations

A key requirement for patient centricity is allowing sufficient time for meaningful conversation between HCPs and patients. However, recent research indicates that physicians today often do not have sufficient time to provide optimal patient care, and that the average physician spends two hours on paperwork for every one hour of patient care. ZoomRx data shows that the average conversation between a patient and specialist lasts just 7.2 minutes, suggesting that HCPs often lack the time for an in-depth conversation about a patient's unique needs and wellbeing.

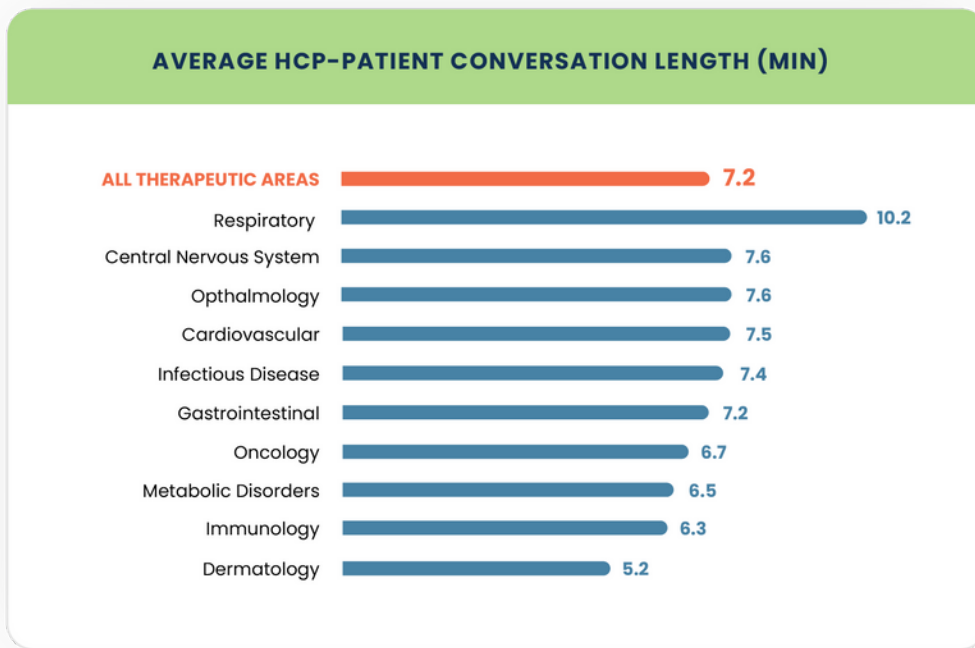


Figure 1. Average HCP-Patient conversation length across therapeutic areas, in minutes.

## Actual patient share of voice lags far behind the ideal state

The limited time for patient visits is compounded by the fact that HCP speech accounts for more than 80% of the average HCP-patient conversation, while patient speech contributes to less than 20%. This is less than half of HCPs' reported ideal of 51% patient share of voice (as measured via HCP survey), and amounts to an average of just 92 seconds of patient speech per visit. Especially alarming is that oncology patients, who often face complex and agonizing tradeoffs between extending survival and quality of life, typically have only 41 seconds per oncologist visit to express their opinions.

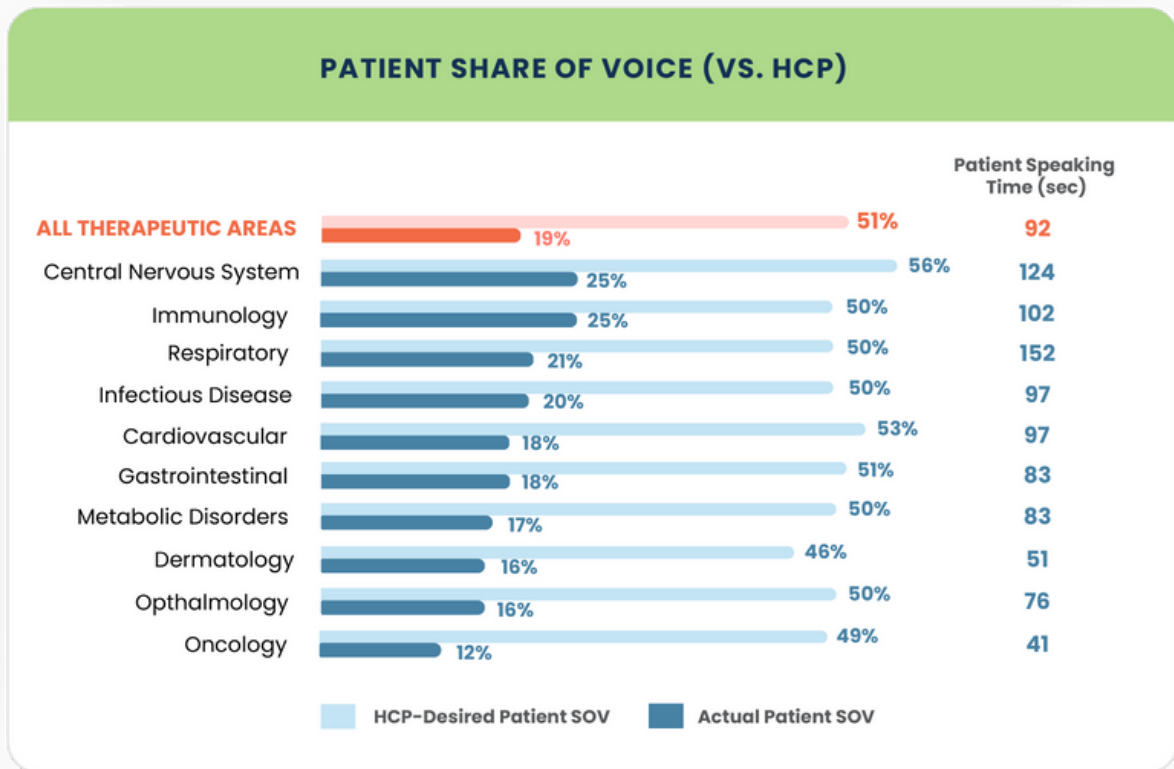


Figure 2. HCP-desired patient share of voice (collected via quantitative survey) vs. actual patient share of voice (quantified from real-world HCP-patient conversation recordings), and average patient speaking time per specialist visit (in seconds) across therapeutic areas

## Proactive HCP questioning - not patient preparedness - is the main driver of patient voice

By examining the proportion of time spent discussing common topics across TAs, some insight can be gained regarding which conversation topics drive patient engagement. For example, TAs with above average patient speech tend to spend a larger proportion (33%) of the conversation discussing patient history than TAs with below average patient speech (23%).

Therapeutic Area	Patient speech (seconds)	Treatment Decision	Patient History	Safety	Access	D&A	Diagnostics	Education	Patient Concerns	Logistics & Scheduling
Respiratory	152	9%	39%	8%	7%	8%	9%	18%	2%	0%
Central Nervous System	124	39%	28%	14%	8%	4%	7%	0%	0%	0%
Immunology	102	39%	30%	6%	7%	9%	8%	0%	0%	0%
Infectious Disease	97	43%	26%	8%	9%	9%	1%	1%	3%	1%
Cardiovascular	97	22%	42%	15%	10%	6%	5%	0%	0%	0%
<b>ALL THERAPEUTIC AREAS</b>	92	36%	27%	11%	8%	7%	6%	2%	2%	1%
Gastrointestinal	83	26%	30%	15%	7%	8%	10%	2%	0%	0%
Metabolic Disorders	83	25%	20%	18%	10%	14%	13%	0%	0%	0%
Ophthalmology	76	20%	17%	10%	0%	4%	31%	0%	8%	9%
Dermatology	51	49%	17%	13%	6%	4%	9%	1%	1%	0%
Oncology	41	32%	29%	11%	7%	0%	8%	0%	12%	1%
TAs with ABOVE Average Patient Speech	114	30%	33%	10%	8%	7%	6%	4%	1%	0%
TAs with BELOW Average Patient Speech	66	30%	23%	13%	6%	6%	14%	1%	4%	2%

Figure 3. Proportion of time spent on common topics during HCP-patient conversations, across therapeutic areas.

However, the variable most highly correlated with patient speech is simply the number of questions asked by the HCP ( $R^2=0.69$ ). There is a much smaller positive correlation between patient speech and the number of questions asked by the patient ( $R^2<0.1$ ), suggesting that even the most engaged and informed patients may struggle to have their voices heard without active effort by HCPs to solicit information.

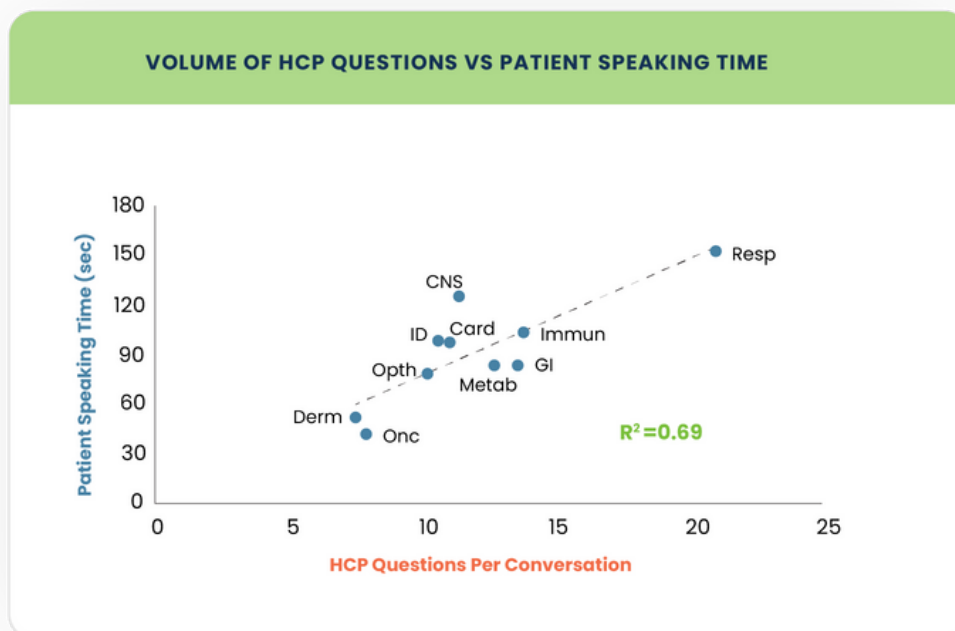


Figure 4. Correlation between the number of questions asked by the HCP during an HCP-Patient conversation and total patient speaking time, by therapeutic area.

## Implications for Pharma

The US healthcare system is in a precarious position, with growing fears that record-high physician burnout levels may lead to declining standards of patient care. Pharmaceutical companies must fully appreciate the value of physicians' time and help to minimize time spent outside of patient care. This includes offering efficient and valuable rep visits, providing HCP support resources, and sharing insights on common patient issues, questions, and needs. This guidance can foster more efficient and effective communication and help HCPs extract critical information from their patients.

With limited time to spend in direct conversation with HCPs, educating patients outside the physician's office is also crucial. Patients should be made aware of the treatment options available, the most important questions to ask their HCPs about treatment, and external resources like support groups and financial assistance. Providing patient education materials and interactive platforms can encourage patients to actively participate in their healthcare decisions and amplify the patient voice within the HCP-Pt conversation, ultimately leading to better health outcomes.

## Conclusions

The patient voice is critical not only for HCPs' treatment decisions, but also for pharmaceutical companies in developing and delivering effective therapies. Currently, time spent listening to the patient voice within real-world HCP-Patient conversations is far behind the patient-centric ideals advanced by the broader healthcare industry. By taking tangible steps to understand and quantify the patient voice for specific brands and markets, pharma brands and manufacturers can help bridge the gap between perception and reality and truly embrace patient centricity.

**To learn more about ZoomRx's HCP-Patient Conversation recordings, check out our [platform overview](#) and recent [whitepaper](#).**

**To learn how ZoomRx can help your organization in its journey toward patient centricity, please reach out to**

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