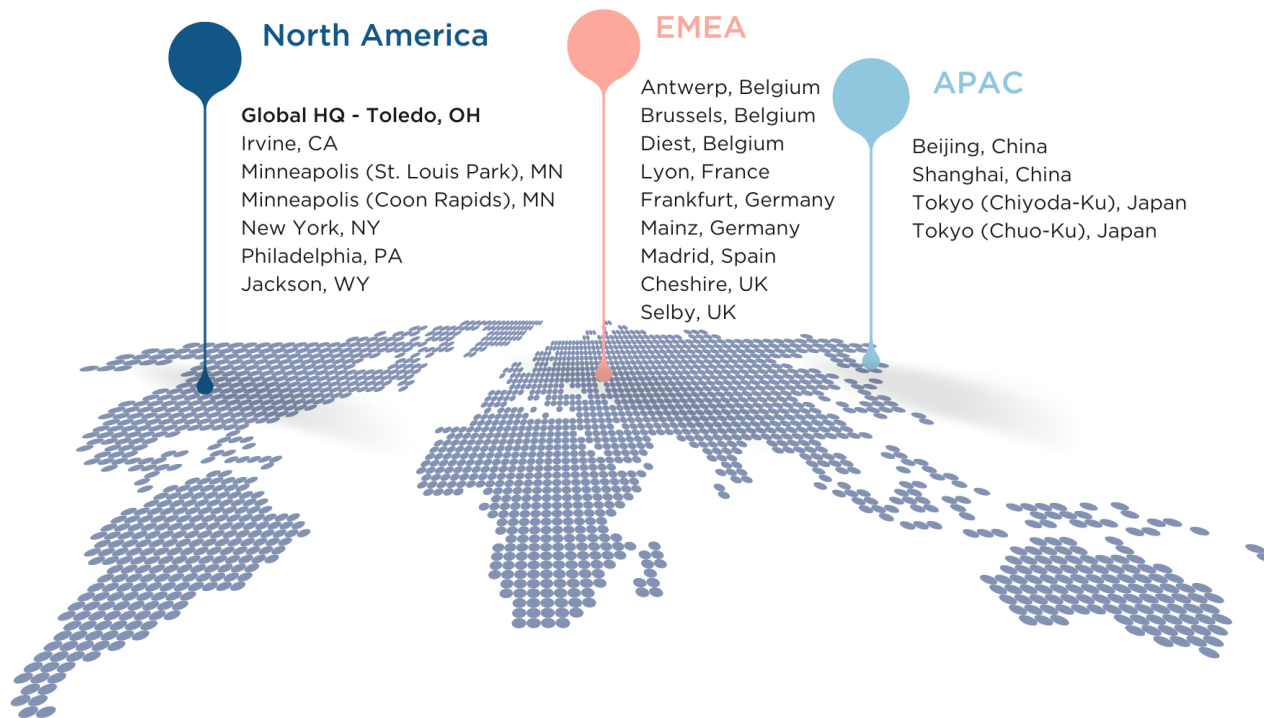


Patient empowerment in medical device treatment decisions

November 2024

SUAZIO - Meet the Team



By the Numbers

55+ Years in Business
1900 Employees
125 Clients
1700+ Projects

Quality & Flexibility

Senior Consultants
In-house call center with trained & qualified interviewers
35+ native languages capabilities

Research Guideline Compliance

Intellus/Insights Association/Ephmra guidelines
Member of EphMRA and ESOMAR
ISO certification 27001/27701

Part of NAMSA

World's leading CRO for Medtech/IVD
Access to 1900+ clinical & regulatory staff
Broad therapeutic expertise



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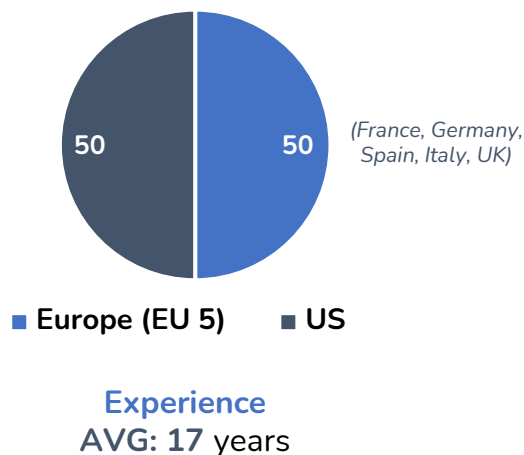
Study Background

Objective

With an increasing patient empowerment across healthcare pathways, we aim to

- better understand physicians' view of patient involvement in treatment decision and medical device selection
- Inform medical device manufacturers what physician-patient support tools/materials should be developed

Sample per region



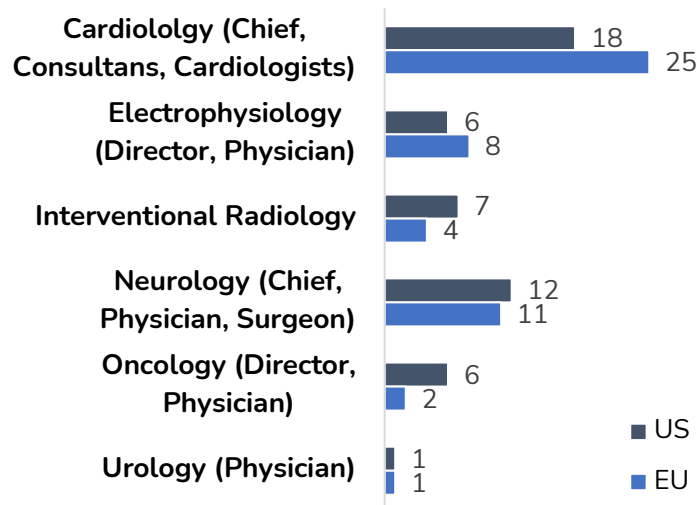
Methodology

N=100 Quantitative 10-minute online surveys.

Between July & August 2024



Role by Region

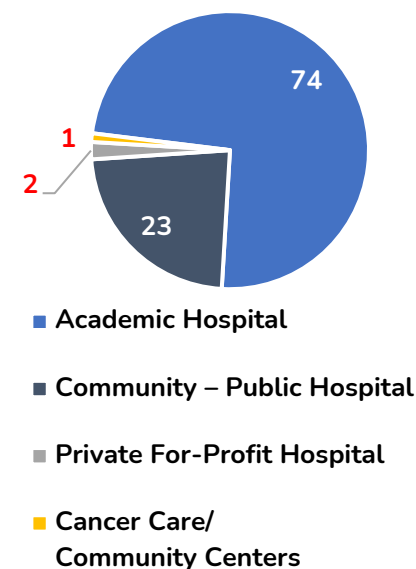


Participants

Level of influence in medical devices purchase decision (N):

- Main decision-maker: 70
- Part of team/committee makes final decision: 15
- Make decision, after consulting with others: 13
- Evaluate and make recommendation: 2

Facility type

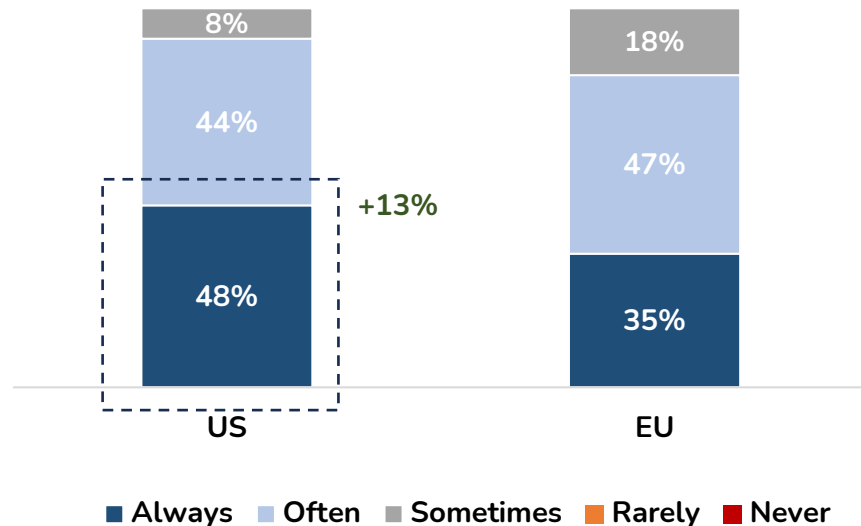


Sharing the Treatment Decision Process with Patients

35% or more of physicians frequently make a joint decisions with patients, but only 48% include them always. Educational workshops are an opportunity for device manufacturers to become influential

How frequently do they decide on a treatment together with patients?

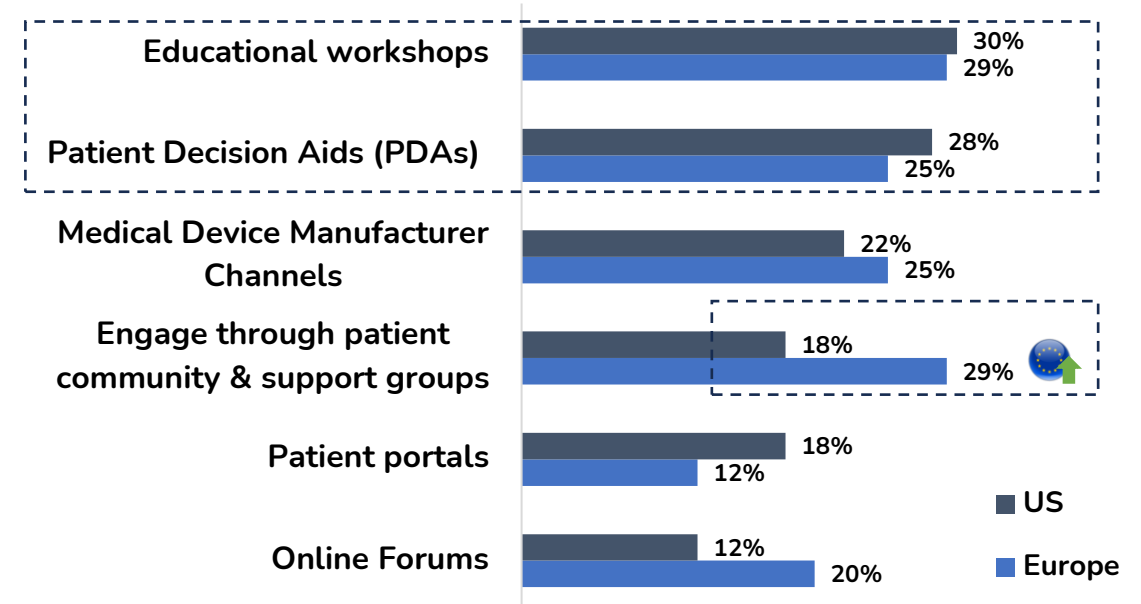
American physicians share decisions with patients more frequently than Europeans (lowest in Germany and Spain)



Single Select

Tools used for a shared decision

Physicians use tools, such as workshops the most overall with European participants believe in engaging with patient groups as a resource for shared decision making



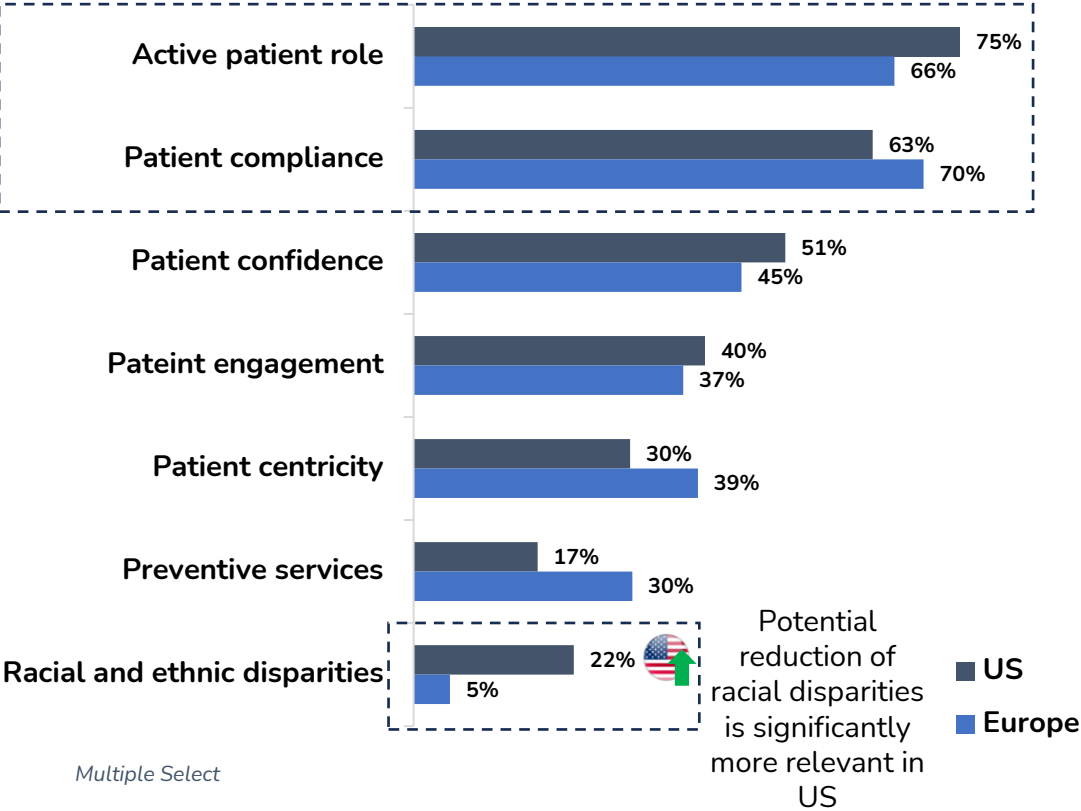
Multiple Select

Benefits or Challenges from Patients' involvement

Above 60% of physicians believe patients' involvement can make them more likely to continue their treatment pathway, but over 80% are concerned about access to misinformation

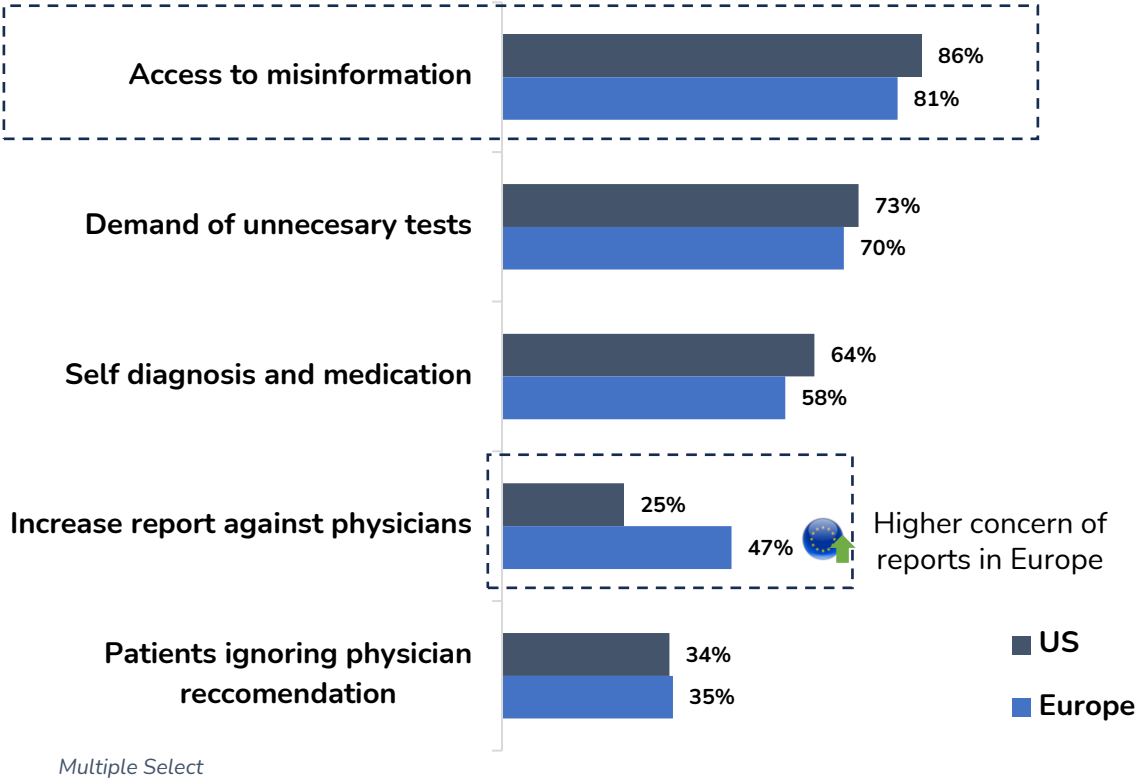
Benefits of patient involvement & engagement

In both regions physicians believe active patients and compliance are key potential benefits in healthcare



Challenges of patient involvement & engagement

The biggest challenge in physicians' mind regarding patient involvement is their access to misinformation about their treatment

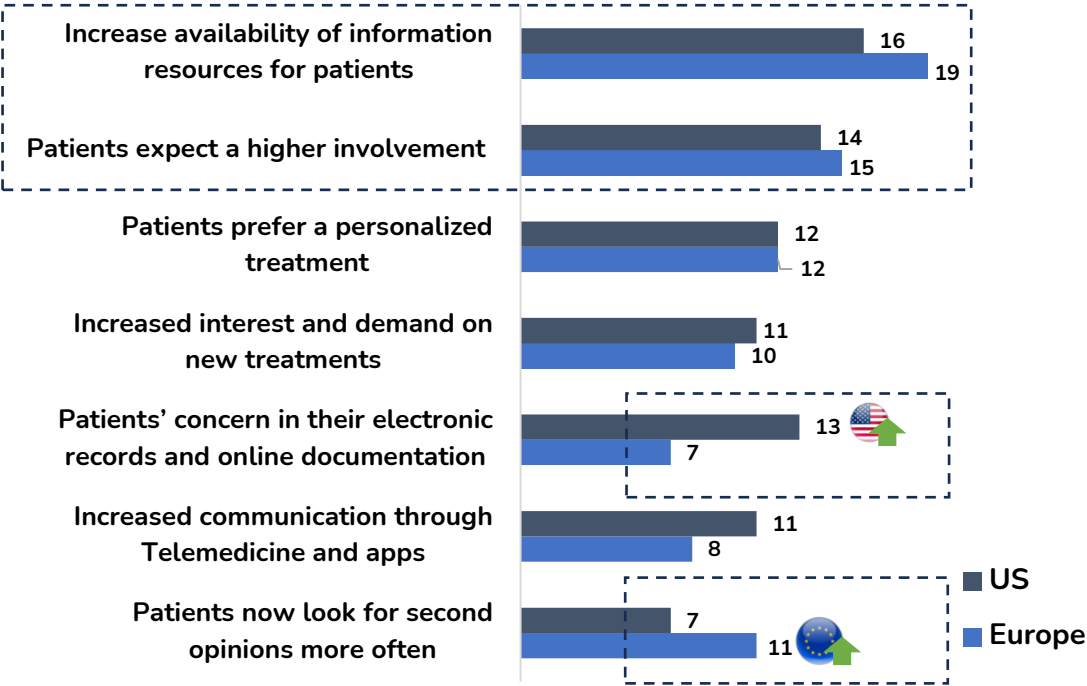


Physician Drivers in a patient-physician relationship

Physicians expect patients to become more involved in the near future when making treatment recommendations. They currently prioritize patients' condition, goals, and including them in the decision

Most relevant changes in patient-physician relationship last 3-5 years.

American patients seem more concerned over their online information and Europeans on a second opinion according to physicians

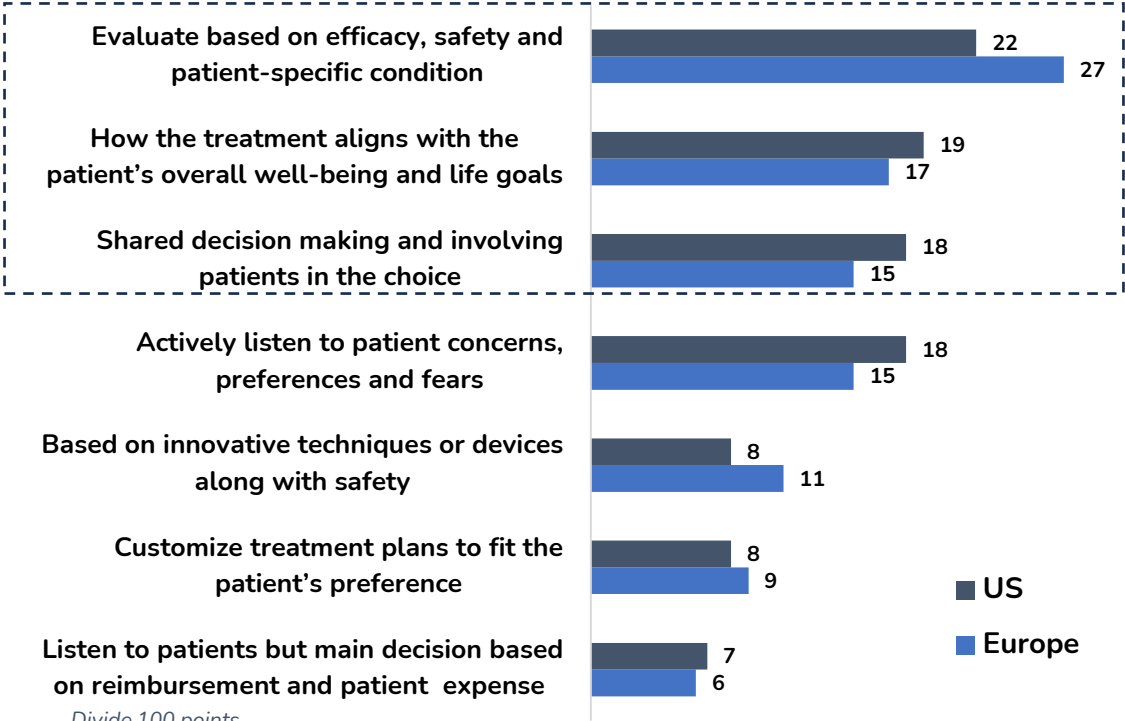


Divide 100 points

Others(10 points or less): Patients expect more detailed follow-ups, Patients are more/less involved in their survivorship plans,

Most relevant items assessing patient preference & treatment recommendation

Physicians base their recommendations similarly in both regions, prioritizing shared decision making with an active patient role



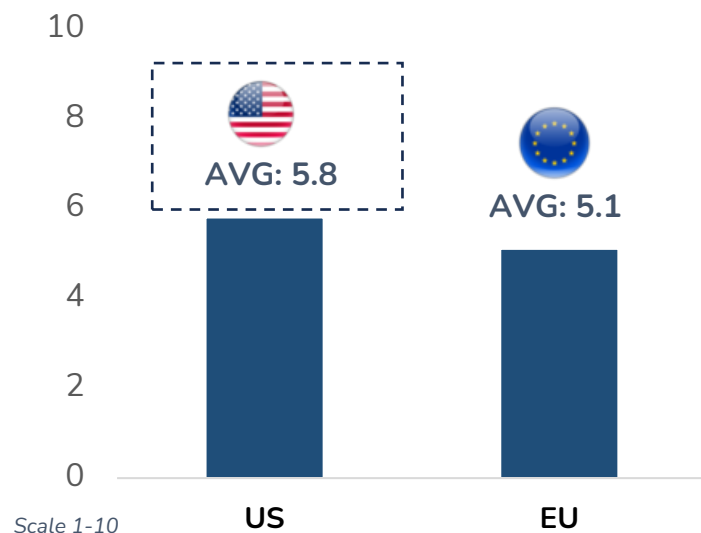
Divide 100 points

Patients influence in device selection

The role patients play in the final device or manufacturer selection is currently low at a max average of 5,8 in US and 5,1 in Europe. Physicians do mention the increase in patient knowledge and suggestions

Patient influence in selection of devices and manufacturers

Physicians mention an overall low patient influence, but it becomes slightly higher for US physicians



In their own words

“Patients will be able to look up information online and make strong suggestions of their preferences” Neurologist, Score 8



“They have *more info* so they will have preferences, but ultimately the payor decides, and the *physician has final say*” Oncologist, Score 7

“I believe that despite *increased engagement* in their care, it will be *unlikely that most patients will inform* the devices/manufacturers used.” Cardiologist, Score 2,



“Patients are *very well informed* and always want the *most modern* treatment method” Neurosurgeon, Score 9

“I think patient decision making is important but ultimately *the decision should come down to the clinician* responsible for their care” Interventional Radiologist, Score 6

“I do not see an immediate change in this but *may be more down the line.*” Cardiologist, Score 5

Patients influence in device selection

There are overall lower scores across regions, but the US and therapeutic areas Neurology, Urology and Oncology are the highest scoring

Patient influence in selection of devices and manufacturers

A potential explanation of the higher perceived influence in Neurology, Urology and Oncology could be because the nature of the therapeutic area, where disease treatment can be a long-term engagement.

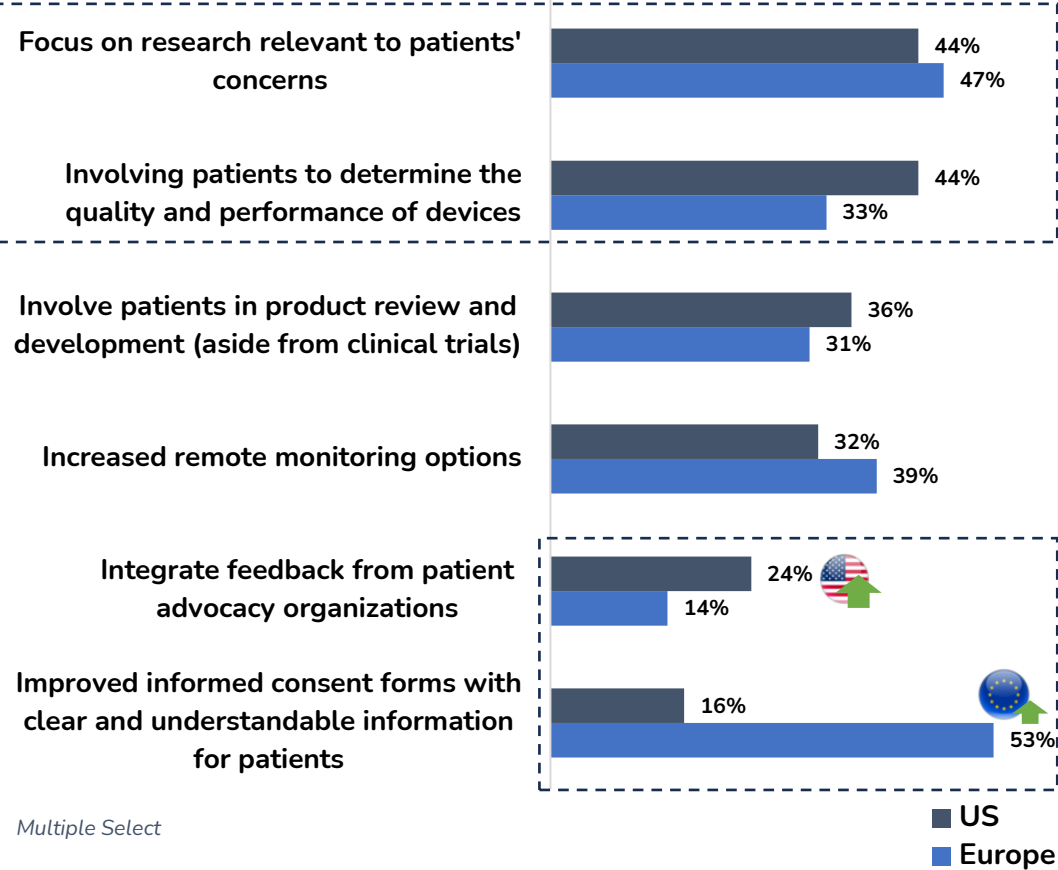
Influence of patients in selection of device and manufacturer	Total	US	Europe	Cardiology	EP	Interventional Radiology	Neurology	Oncology	Urology
Sample N	100	50	51	43	14	11	23	8	2
Score 1 to 5	45%	38%	51%	51%	57%	55%	26%	38%	0%
Score 6 to 7	36%	38%	33%	40%	36%	18%	39%	25%	50%
Score 8 to 10	20%	24%	16%	9%	7%	27%	35%	38%	50%
AVG	5,5	5,8	5,1	5,0	4,5	4,9	6,6	6,4	7,5

Scale 1-10

Patient engagement and device manufacturers

At least one third of physicians in both regions believe medical device manufacturers should involve patient more in product development and evaluation. More than 50% of Europeans want improved consent forms

How can manufacturers aid in patient engagement



“The patient's must be an active participant in medical device manufacturers products. That involvement may reflect surveys of patients' perception of the effectiveness of the device as well as the ability to undertake remote monitoring. Ultimately the patient's experience will assist in development of future course of device investigation and development” US cardiologist

“Patients will be able to look up information online and make strong suggestions of their preferences” US Neurologist

“There should be more specifically directed goals of device manufacturers to address what the patient needs and not what others think they need.” US, Oncology



“Consent forms maybe incorporating graphics or photos would help patients understand better. Feedback from advocacy groups will also increase the trust of patients” Germany, Neurosurgery

“The client and end user are the most appropriate to assess the effectiveness and quality of the products.” France, Cardiology

“Involving them in product review and development would just enhance patient engagement and also be a positive thing for industry.” UK, Neurosurgery

Patient engagement and device manufacturers

Preferences will change across healthcare areas, but all wish medical device manufacturers to include patient feedback and increase transparency

How can manufacturers aid in patient engagement

It seems EU participants are also looking for help in the development of consent forms to support them in the shared decision making of treatment decision

How manufactures could aid patient engagement	Total	US	Europe	Cardiology	EP	Interventional Radiology	Neurology	Oncology	Urology
Sample N	100	50	51	43	14	11	23	8	2
Focus on research relevant to patients' concerns	46%	44%	47%	16%	7%	9%	26%	38%	100%
Involving patients to determine the quality and performance of devices	39%	44%	33%	23%	14%	45%	52%	63%	0%
Involve patients in product review and development (aside from clinical trials)	34%	36%	31%	40%	36%	27%	52%	25%	0%
Increased remote monitoring options	36%	32%	39%	23%	43%	45%	39%	38%	0%
Integrate feedback from patient advocacy organizations	19%	24%	14%	44%	36%	64%	48%	25%	50%
Improved informed consent forms with clear and understandable information for patients	35%	16%	53%	37%	64%	18%	35%	13%	100%

Multiple Select

Beneficial resources from medical device company

Over 30% of physicians believe one-on-one patient training modules and tailored patient programs are the most beneficial resources a medical device company could provide to support physician-patient engagement

Most beneficial resources from a medical device company

Analysis shows large differences by therapeutic area. Manufacturers can try to address those needs by co-developing those resources.

Most beneficial resources from medtech companies	Total	US	Europe	Cardiology	EP	Interventional Radiology	Neurology	Oncology	Urology
Sample N	100	50	51	43	14	11	23	8	2
One-on-one patient training modules	34%	28%	39%	35%	21%	36%	39%	25%	50%
Patient engagement programs tailored to specific therapeutic areas	33%	38%	27%	26%	21%	36%	39%	63%	50%
Quality guidance protocols for patient follow up	31%	28%	33%	30%	43%	45%	26%	13%	0%
Training tools for patients with limited digital literacy	30%	26%	33%	28%	64%	0%	26%	25%	50%
Online patient dashboard to share relevant information with patients	25%	24%	25%	12%	14%	45%	43%	25%	50%
Patient engagement online training tool	25%	30%	20%	30%	21%	0%	30%	13%	50%
Advocacy groups for patients	21%	18%	24%	21%	0%	27%	22%	38%	50%
FAQ for barriers to patient portals and product websites	17%	22%	12%	19%	14%	9%	4%	63%	0%

Multiple Select

Conclusions & Key Learnings



- Physicians frequently make a joint decision on treatment with patients, but only 48% include them always. Improving educational workshop can be an opportunity for device manufacturers to help clinicians.



- Above 60% of physicians believe patients' involvement can make them more likely to continue their treatment pathway, but over 80% are concerned about access to misinformation



- Physicians expect patients to become more involved in when making treatment recommendations. They currently prioritize patients' condition, goals, and including them in the decision



- The role patients play in the final device or manufacturer selection is currently low at a max average of 5,8 in US and 5,1 in Europe. Physicians do mention the increase in patient knowledge and suggestions



- At least one third of physicians in both regions believe medical device manufacturers should involve patient more in product development and evaluation. More than 50% of Europeans want improved consent forms
- Over 30% of physicians believe one-on-one patient training modules and tailored patient programs are the most beneficial resources a medical device company could provide to support physician-patient engagement



Are you interested to discuss further or learn more?

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