



PATIENT OPINION LEADERS: THE NEW KOLs FOR PHARMA?

The rise in patient power is transforming the healthcare landscape. Patients are not only increasingly challenging physicians, payers and pharma companies to see things from their perspective, but they are doing so within healthcare systems that are trying to become more patient-centric. Social media is accelerating this revolution by facilitating the emergence of patient opinion leaders (POLs), so-called because of their impressive online followings. But just how influential are these POLs? What is the nature of their influence and how should pharma companies best respond?

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EXECUTIVE SUMMARY

This report examines the emergence of patient opinion leaders (POLs), the extent and nature of their influence and how pharma companies can best work with these people. POLs are defined as people who live with a disease and who have attracted large numbers of followers online because of the extent of their knowledge and their ability to encourage others to raise their expectations of their healthcare systems.

POLs are important to pharma mainly because of their role in changing the social contract patients have with their physicians that is so central to conventional healthcare. As patients themselves, they also have a valuable role as sources of feedback for pharma on how products are taken in the real world. This report examines how they are driving a revolution in healthcare, how they are being recruited by pharma companies to better understand real-world disease issues and how their influence differs massively depending on the therapeutic area they work

in. It looks to the US where the empowerment movement is strongest because the nature of private markets encourages patients to function more like consumers than in the tax-funded healthcare systems of Europe. It also looks to areas such as cancer, which are leading the empowerment movement because of the nature of the condition, the rapidly changing options for treatment and the high prices.

The conclusions are clear: to work effectively with POLs, pharma companies must understand that their main motivation is to raise the expectations of their patient communities about what they can expect from healthcare. And they are borne out via several case studies of how pharma is supporting these goals by employing POLs directly, by how they are focusing their marketing messages and, in several other ways, seeking how they can help patients help themselves to feel more confident about managing their healthcare.

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