

Pharma's Role in Improving the Health Experience: Understanding Patient Expectations

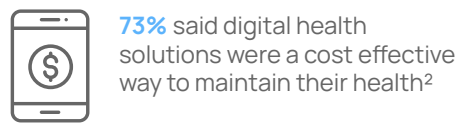
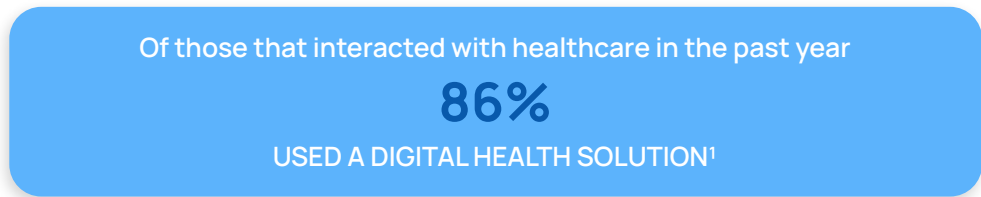
Patients have become accustomed to digital health, but they struggle with fragmented experiences. Patients want integrated solutions that make it easier to access care and manage their health.

This infographic breaks down the key findings from ixlayer's patient research survey, conducted with Ipsos, highlighting what patients expect from pharma, the biggest challenges they face, and the opportunities for biopharma to deliver seamless, patient-first digital health experiences.

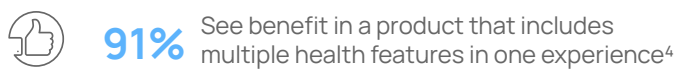
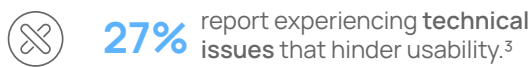
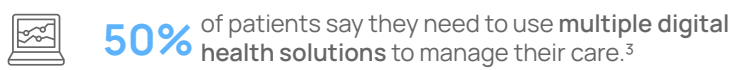


Key Takeaways: Digital Health Adoption is Strong

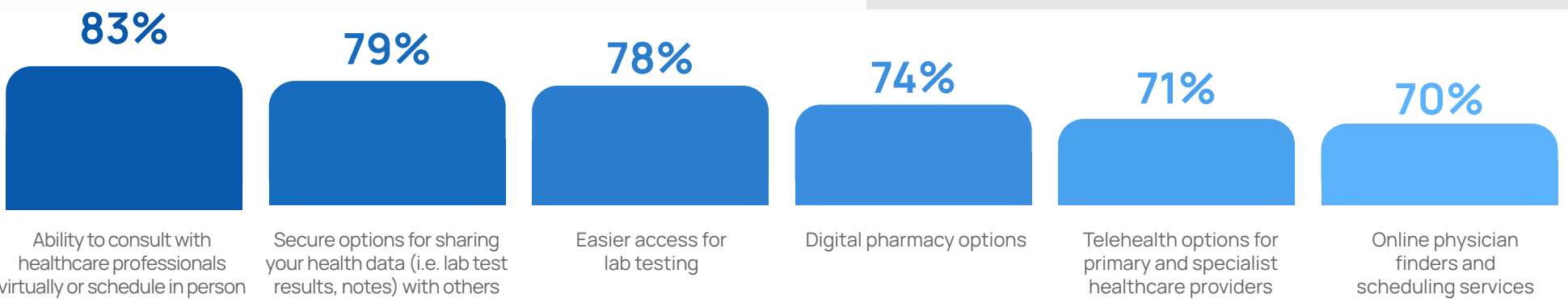
Patients have become accustomed to using digital health products and cite specific benefits from using them.



But, There is Room to Improve

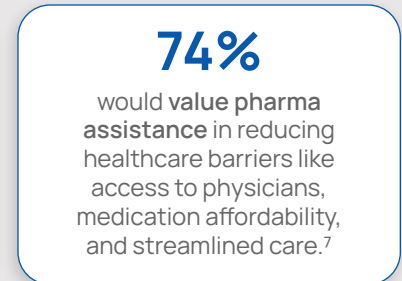
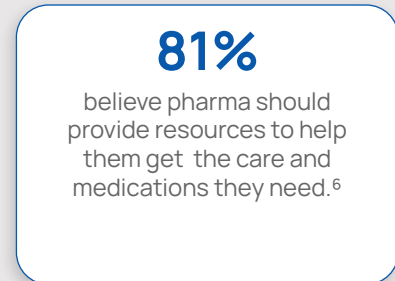


Top Features Driving Usage⁵

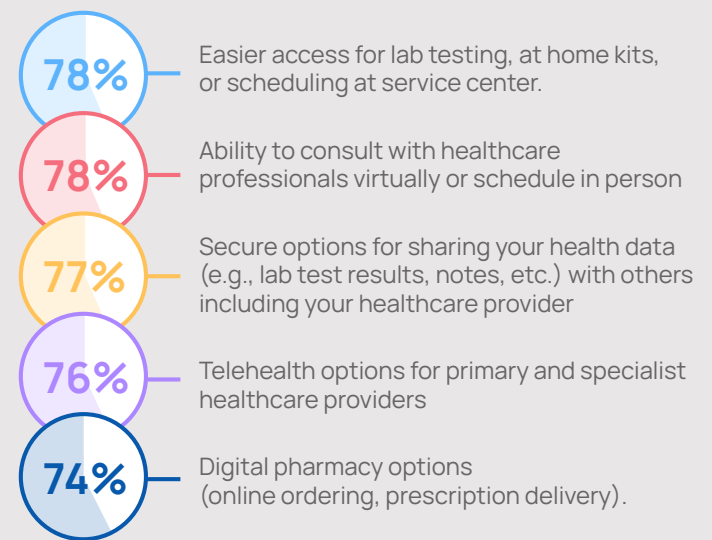


Opportunity: Patients Expect More from Biopharma

Patients are looking to biopharma to help streamline the patient journey.



Offering services that are available in direct-to-patient programs also improves perception.



More positive perception of biopharma if the following services were provided.⁸

About the ixInsights patient research:

These are some of the findings of an ixlayer patient survey, with data collection done by Ipsos. A total of n=414 individuals, ages 21+, with at least one of the following conditions were surveyed online between January 6-24, 2025: asthma, COPD, type 2 diabetes, heart disease, psoriasis, or atopic dermatitis. No weights were applied to the data, and the findings reflect the opinion of these survey respondents only.

1. ixInsights 2025 / Ipsos Patient research, Base: All respondents (n=414); S10: Out of 785 respondents that completed the screener 106 respondents did not select any digital options but had interacted with healthcare in the past year. Base: All respondents (n=414)

2. ixInsights 2025 / Ipsos Patient research, Base: All respondents (n=414); A10_t2b. [Digital Health Solutions - Top 2 Box Summary] - On a scale from 1 to 5, where 1 is strongly disagree and 5 is strongly agree, please rate how much you agree or disagree with the following statements:

3. ixInsights 2025 / Ipsos Patient research, Base: All respondents (n=414); A10_t2b. [Healthcare Experience - Top 2 Box Summary] - On a scale from 1 to 5, where 1 is strongly disagree and 5 is strongly agree, please rate how much you agree or disagree with the following statements: I have to utilize multiple digital health solutions to manage my health; I experience technical difficulties when using digital health solutions A30. [Reasons for Dissatisfaction] - What are the top reasons generally that you are not satisfied with the digital health solutions you are using/used in the past? 33%

4. ixInsights 2025 / Ipsos Patient research, Base: All respondents (n=414); A35. [Benefit of Solutions] - If a company were to offer all of the following in one solution, how beneficial, if at all, would that be? Helping me find a physician; Providing patient assistance programs to help those who cannot afford their medication; Providing tools or resources to help me access medication (e.g., delivery services, automatic reminders); Education about the conditions that medication treats; Support programs to help with adherence (e.g., medication reminders); Telehealth services to connect me to care; Provision of at home lab testing kits; Easier access for lab testing; at home kits, or scheduling at service center

5. ixInsights 2025 / Ipsos Patient research, Base: All respondents (n=414); C5 [S]. If a digital health solution offered the following features, how likely on a scale from 1 to 5 where 1 is not at all likely and 5 is extremely likely, how likely would you be to use it? Top 2 box

6. ixInsights 2025 / Ipsos Patient research, Top 2 Box, Base All n=414 - On a scale from 1 to 5, where 1 is strongly disagree and 5 is strongly agree, please rate how much you agree or disagree with the following statements: "Pharmaceutical companies should provide resources to patients to help them get the care and medicines they need."

7. ixInsights 2025 / Ipsos Patient research, Top 2 Box Base All n=414. - On a scale from 1 to 5, where 1 is strongly disagree and 5 is strongly agree, please rate how much you agree or disagree with the following statement: I would value help from a pharmaceutical company to reduce the healthcare barriers I encounter (e.g., help accessing physicians, increasing access to medications or reducing price)

8. ixInsights 2025 / Ipsos Patient research; C10 Base: All respondents (n=414) If a pharma company were to offer a digital solution with the following attributes how, if at all, would it change your perception of the company? (Top 2 Box) Somewhat / Much more positive