



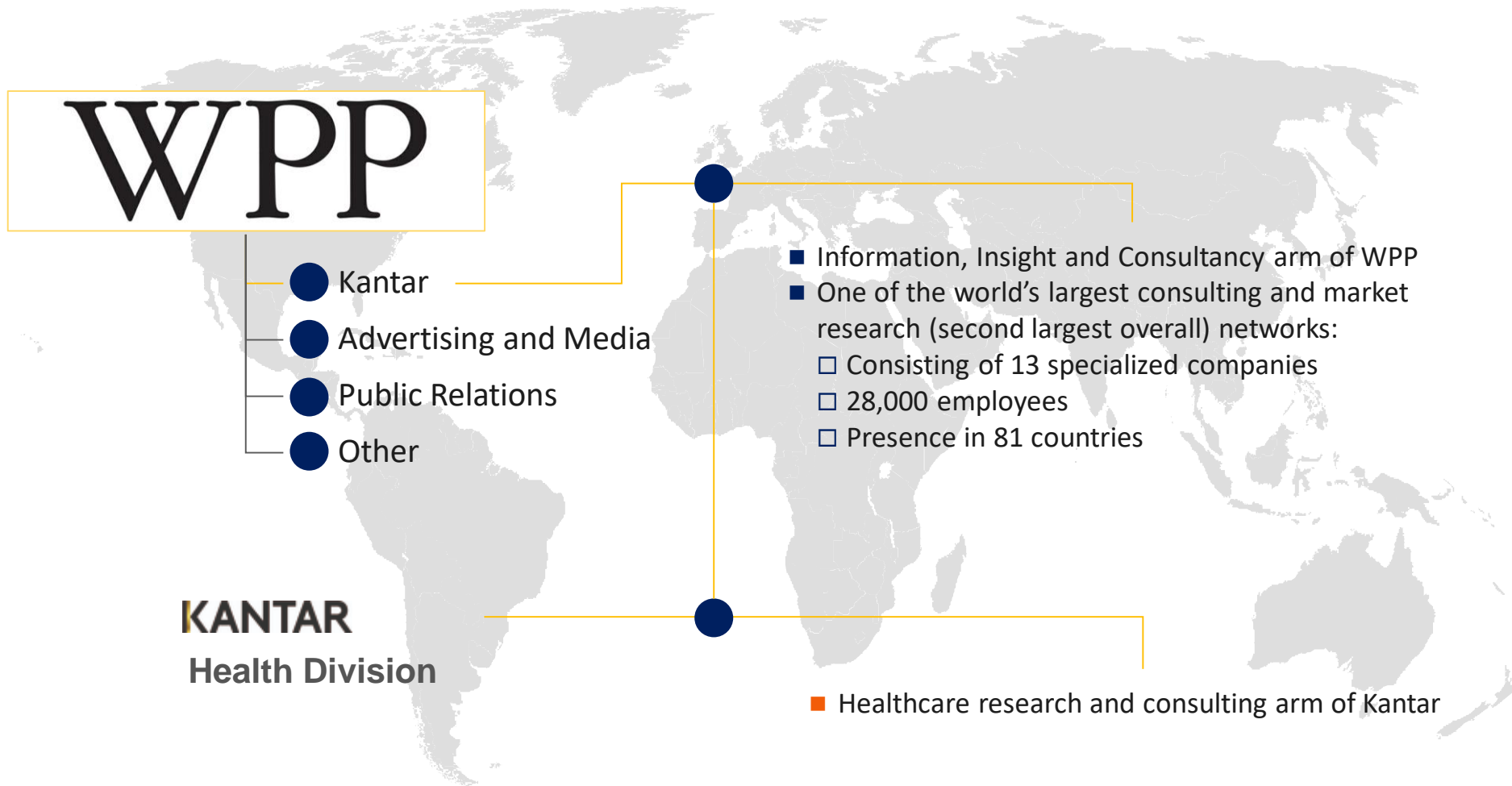
KANTAR

Trends changing the world of health

*Health and wellbeing
trends in Asia Pacific*

21st May, 2019

Part of the largest Marketing Services Agency in the World



We Integrate Clinical & Technical Expertise With Our Offerings Throughout The Development & Commercialization of Pharmaceuticals



Clinical & Scientific Services

- Pipeline Prioritization
- Asset Evaluation
- KOL Insight
- Competitive Conference Intelligence
- Due Diligence



HEOR

- PRO Development & Validation
- Observational Studies
- Conjoint Analysis
- Non-Interventional Studies



Epidemiology

- Custom Epidemiology
- Extensive Oncology Epi Expertise
- Epi Database G7



Market Access / Commercial Strategies

- Government Policy & Trends
- Pricing & Reimbursement
- Oncology Market Access



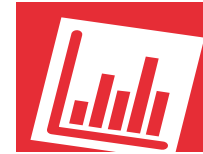
Forecasting

- Integrated Custom Forecasting
- Demand Assessment and Valuation.
- Patient Flow
- Forecast Architect Oncology Tool



Marketing Insights

- Strategic Commercialization Research
- Inline Brand Optimization
- Patient Journey



Stakeholder Management

- Sales Force Effectiveness
- Physician Experience
- Brand Management and Tracking
- Corporate Reputation



Risk Management & Safety Surveillance

- Phase IV Studies
- Non-Interventional Safety Studies

Agenda

What is driving change in health

The activated health consumer

The change this is driving

Womb to tomb

A person with long dark hair, wearing a grey cardigan over a white top, holds a lit sparkler in their right hand. The sparkler is bright and glowing, with sparks flying upwards. The background is a solid, muted blue. The text "What is driving change?" is overlaid on the left side of the image in a white, sans-serif font.

What is driving
change?



The number of health stakeholders is increasing.

A close-up, low-angle shot of a woman running on a paved road. She is wearing a white athletic tank top and a bright yellow wristband on her left wrist. Her hair is blonde and slightly tousled. The background shows a clear blue sky and distant, hazy mountains. The lighting is bright, suggesting a sunny day.

**Consumers
are more
empowered
and focused on
their wellness.**

A close-up, high-resolution photograph of an elderly Black woman's face. She is smiling gently, with her eyes partially closed. Her skin is dark brown and shows signs of aging, including wrinkles around her mouth and on her forehead. She is wearing a gold chain necklace. The background is a soft, out-of-focus green.

**An aging population
wants more from healthcare
companies and their doctors.**



**Market access is
dynamic and changing.**



**New sources and access
to health information and
services are emerging.**

A close-up photograph of a person's hand interacting with a smartwatch. The watch has a rectangular, metallic-looking face and a dark strap. The person's finger is touching the screen. The background is a blurred city street with many people and lights, suggesting a busy urban environment.

The **digital revolution** is affecting health and wellness.

A photograph of a very crowded city street, likely in Istanbul, with many people walking. The street is lined with buildings and shops, and there are many people walking in both directions. The image is slightly blurred, emphasizing the density and movement of the crowd. The text "The need for real-world evidence is intensifying..." is overlaid in white, bold, sans-serif font in the lower right quadrant of the image.

The need for **real-world evidence** is intensifying...

Introducing the

Activated Health Consumer



Introducing Patient Activation Measure® Segmentation



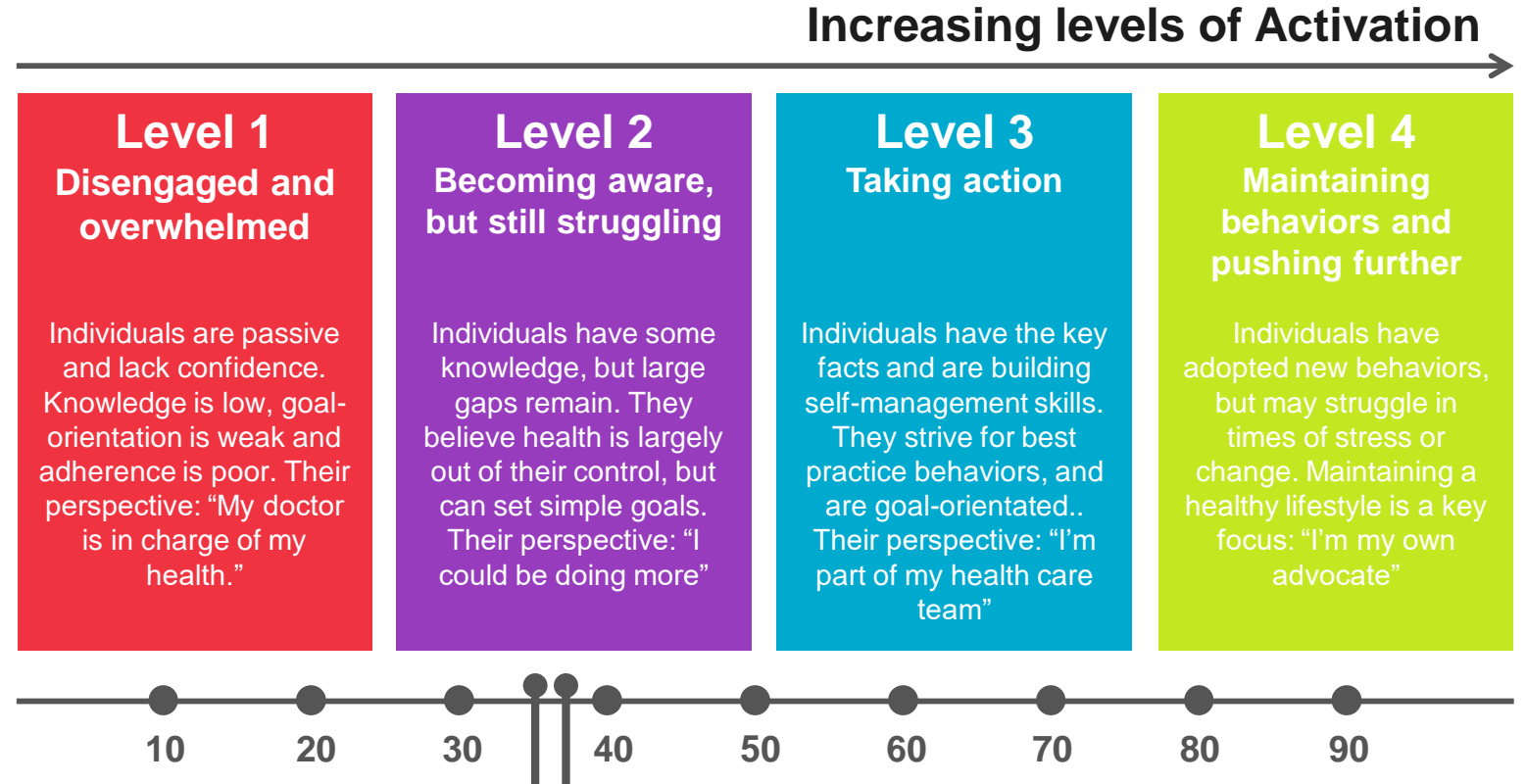
A 10 question measure that assesses a person's self-management ability or activation



Globally validated with 400+ published studies. Used by 200+ organizations in 20+ countries

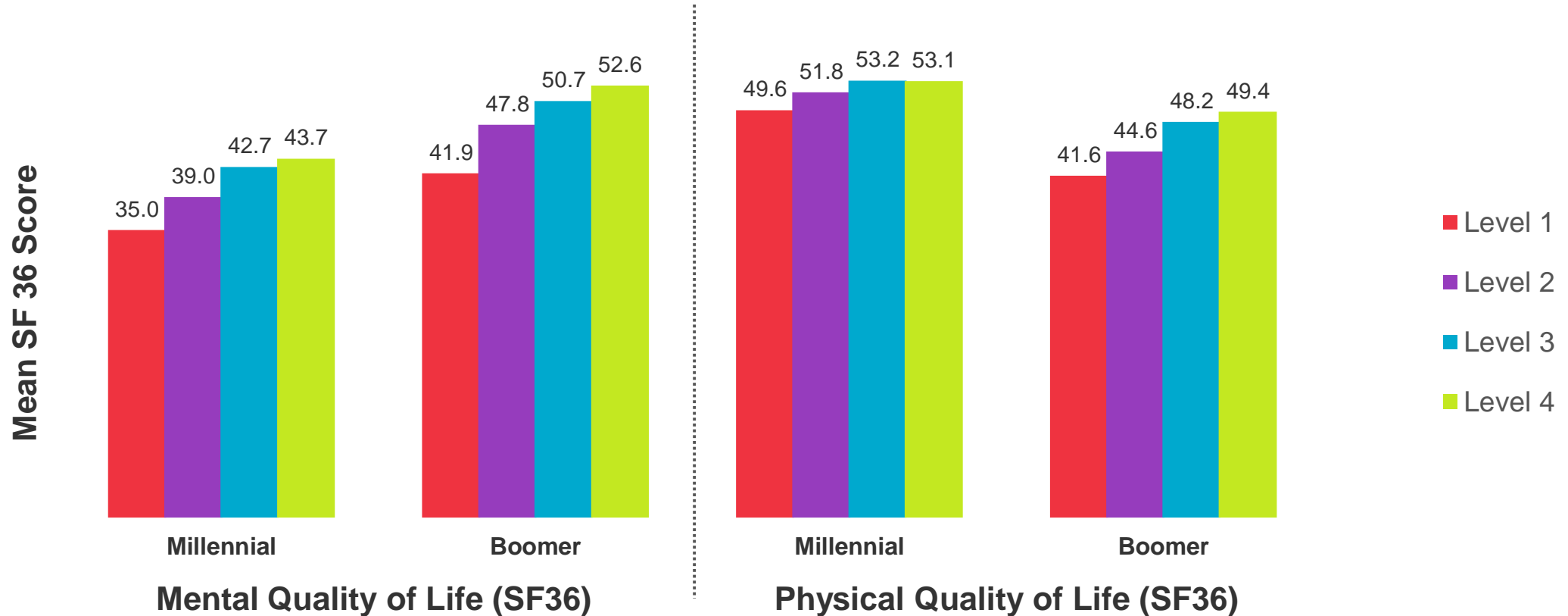


Four distinct activation levels reside along a 100 point empirically derived scale

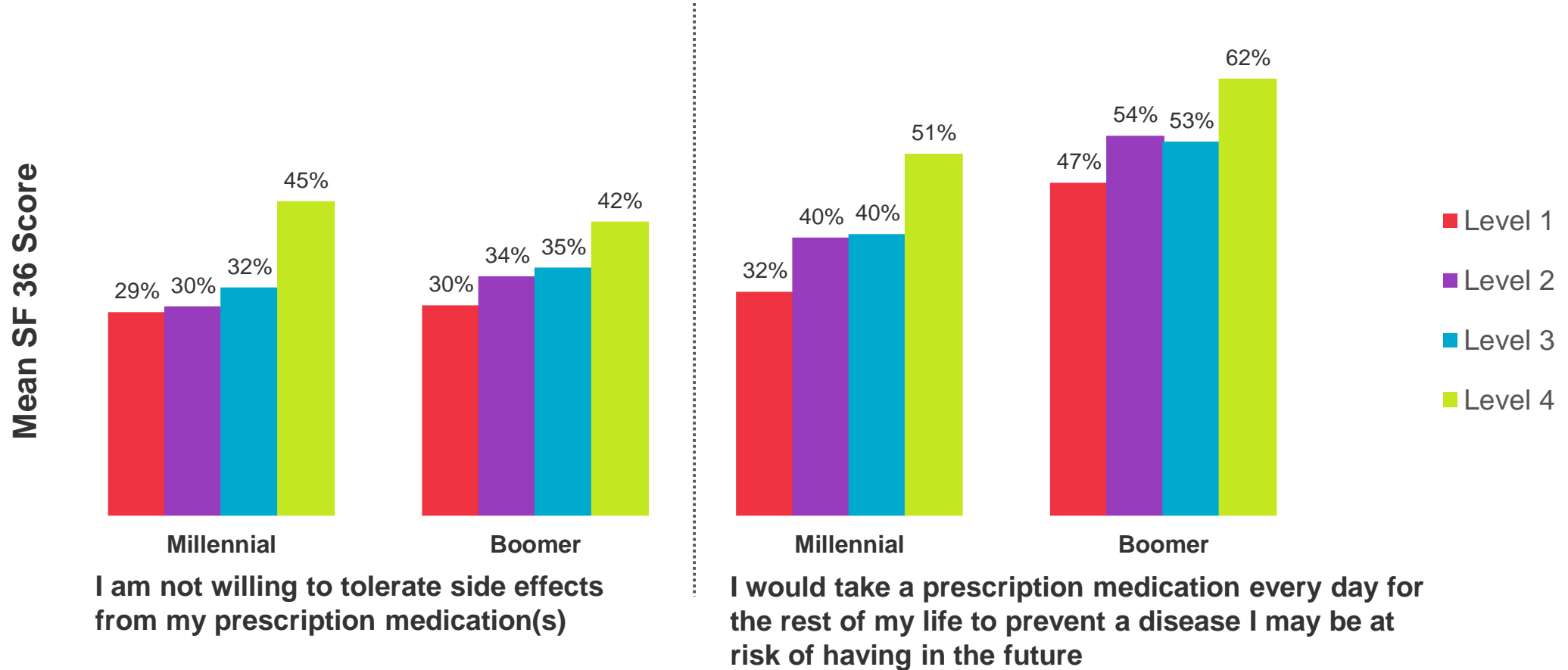


The value of a **single point change** in PAM score is significant and understood with precision, as is the shift between PAM Levels

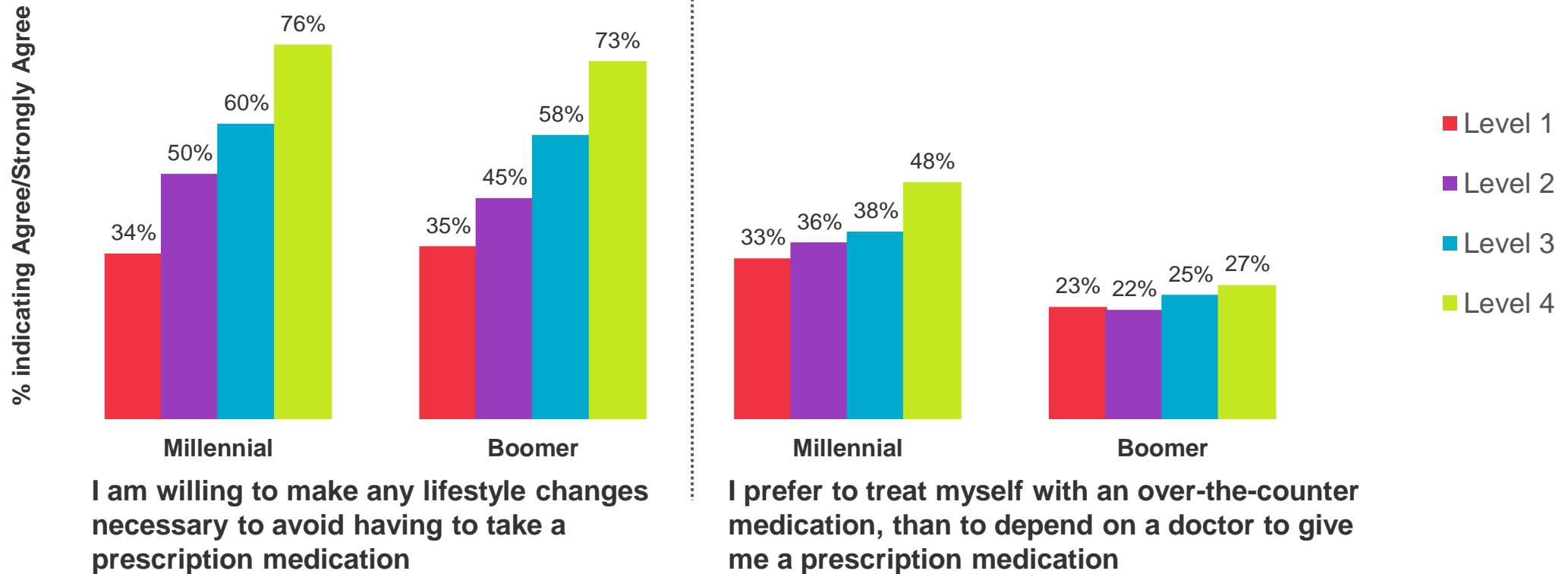
Humanistic Outcomes such as Health Related Quality of Life increase as Patient Activation level increases



Higher activated consumers seek to **avoid intolerance** but are willing to rely on Rx's if it presents an opportunity **to prevent** a disease



Higher activation associates with a greater **willingness to make lifestyle changes** to avoid medication with no difference by generation



Japan and China – results are consistent the higher the PAM categories the better the outcomes

Japan

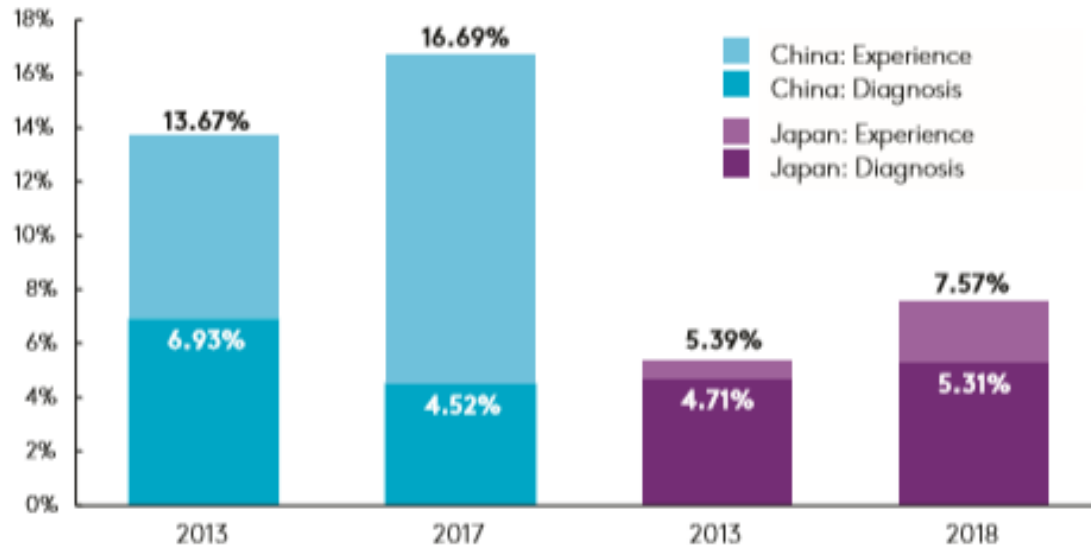
- Bivariate results of Japanese adults by PAM level (1-4) showed that higher activation levels were associated with:
 - Higher: mean age, % married, % retired, % college educated, household income, mean exercise days, and currently taking steps to lose weight. Lower: obesity and smoking rate
- In terms of outcomes, higher PAM scores were associated with:
 - Higher MCS scores. Lower activity impairment
- Level 1 adults were least likely to visit a healthcare provider, and least likely to get an annual check-up.
- Higher activated T2D patients had:
 - Higher Rx satisfaction (results not graphed). Lower HbA1c levels (results not graphed)

China

- Bivariate results of Chinese (urban) adults by PAM level (1-4) showed that higher activation levels were associated with:
 - Higher: mean age, % married, household income, and mean exercise days.
- In terms of outcomes, higher PAM scores were associated with:
 - Higher MCS and PCS scores. Lower work productivity impairment
- Higher activated T2D patients had:
 - Higher MCS and PCS scores
- In China, the proportion of adults taking steps to lose weight did not differ by PAM levels (unlike the results in Japan, which show higher activated adults are more likely to take steps to lose weight than less activated adults).
- The multivariable analyses generally matched the bivariate results. That is, even after adjusting for covariates, the results remained consistent and higher PAM categories were associated with better outcomes.

On mental health...

Figure 1. Proportion experienced and diagnosed of mental disorder in China and Japan in 2013 and 2017/2018.



Respondents who self-reported of being diagnosed with mental disorders (any of anxiety, attention deficit disorder, attention deficit hyperactive disorder, depression, generalized anxiety disorder, panic disorder, phobias, post-traumatic stress disorder, or social anxiety disorder) were included in the analysis, and compared to respondents without any mental conditions.

Figure 2. China in 2017: HRGoL of patients diagnosed with mental disorders and respondents without mental disorders.

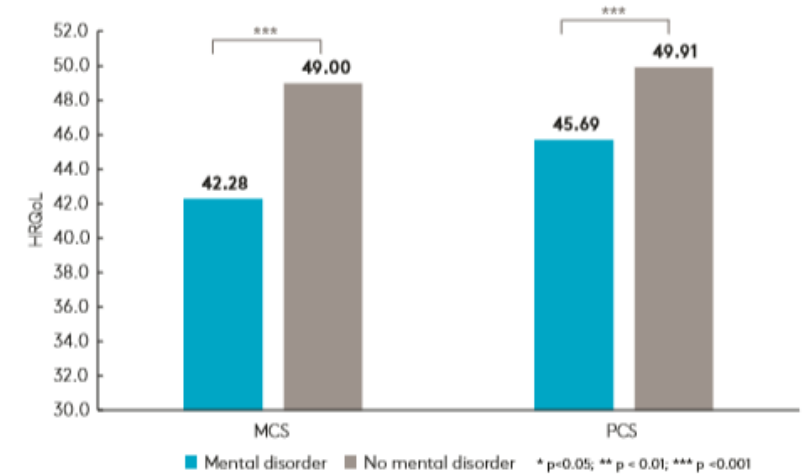
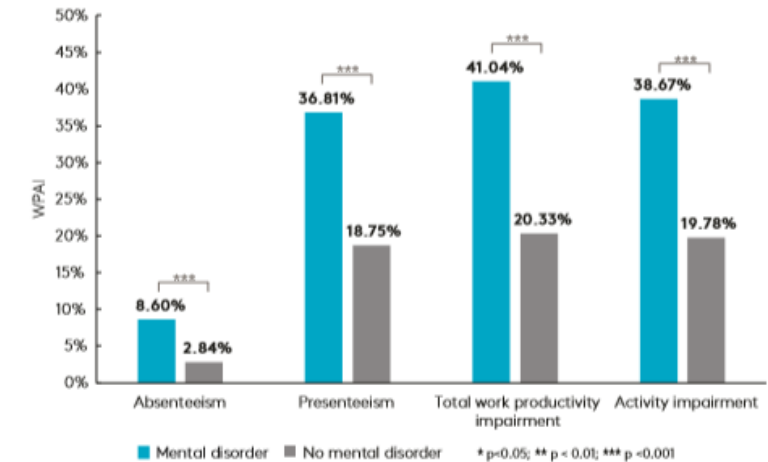


Figure 5. China in 2017: WPAI of patients diagnosed with mental disorders and respondents without mental disorders.





The change this is driving

How is this transforming the way we shop



#1: THE GLOBAL PICTURE

A stable global economy is transferring at-home consumption to out-of-home moments, meaning fewer main meal occasions—especially in Spain, France and the UK.



#2: THE HEALTHY SNACKING BOOM

While habits vary in different markets, there is an indisputable shift towards snacking—with a focus on perceived health benefits. People are beginning to balance intake throughout the day, rather than the more traditional breakfast-lunch-dinner split.



#3: BREAKFAST ROUTINES REMAIN

Habits may differ by country, but routines are set. There are multiple breakfast menus globally, so understanding cultural nuances and context is the key to finding growth.



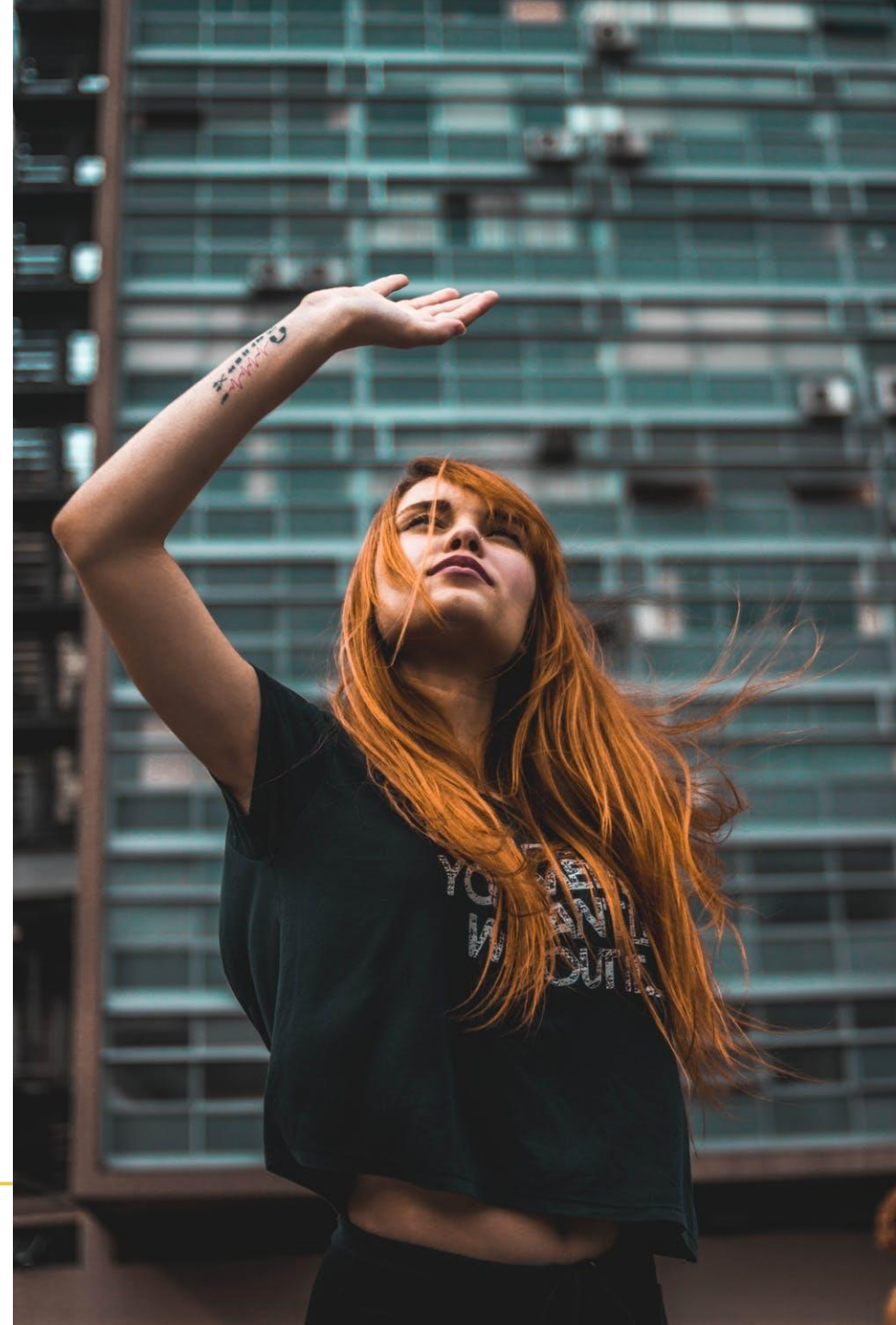
#4: THE SIMPLIFICATION OF MENUS

People are spending less time cooking at home and are simplifying their menus—with a huge impact for categories positioned as dessert occasions. Convenience is a major driver, too, offering vast potential for ready-to-eat solutions.



#5: RAPIDLY CHANGING DRINKS CHOICES

Health consciousness lies at the centre of lactose and sugar reduction, and subsequently other benefits are appearing in products—including hydration, natural and homemade, plant-based, and even fermented and probiotics. As a result, beverages is one of the most fragmented categories, with blurred lines between products and needs.



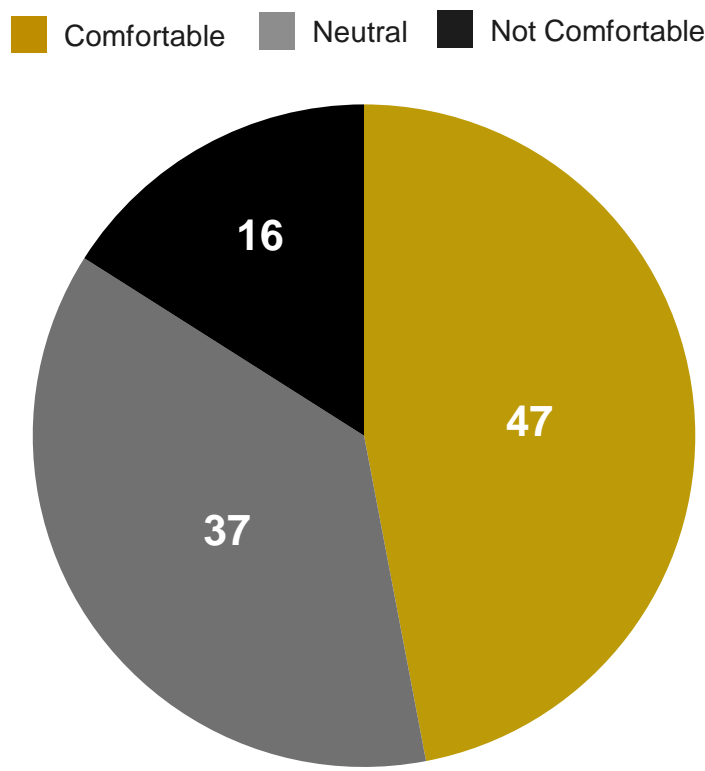


Womb to Tomb ...

Are consumers willing to share their data?

Comfort in sharing details with an insurance company

68% of those who are active are comfortable in sharing their exercise and food intake details



Connectivity gives consumers and HCPs access to real time health and lifestyle data

Internet connected

- Asthma inhalers
- Blood pressure monitors
- BMI scales
- Pills
- Blood glucose meters



Oral hygiene – and parental care

- Internet connected toothbrushes
- Monitor duration, strength and effectiveness of your and your children's brushing



Enhancing skincare



A stylized, glowing orange and yellow comet or rocket tail streaks across the frame from right to left. The tail is composed of many small, bright particles and a larger, more diffuse cloud of light. The background is a deep, dark blue with subtle gradients and some faint, wispy clouds of light. The overall effect is one of motion and energy.

Where Next?

What's just around the corner (or already here)?

- Consumer empowerment (and democratization) of healthcare
- Brand and customer experience are interwoven in building consumer relationships...and it is a reciprocal relationship
- Customers are curating how the brand and experience fits into their world
- It is critical for us to understand the consumer ecosystem to prioritize intersections where health needs and interventions meet
- Womb to Tomb monitoring – and customer relationships
- Increased involvement in their own health and their healthcare decision making – leveraging mHealth



All research is conducted in accordance with the requirements of our Quality System, which confirms to ISO 20252:2012 the International Standard for Market Research, Certification Number : 1019

© Copyright 2019 Kantar, Health Division. All rights reserved. No copies or part copies of this document shall be made without the express permission of Kantar, Health Division.

<http://www.kantarhealth.com/help/report-terms-conditions>