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CASE STUDY

Patient Emotional Journey Analysis

Learn how Convosphere's Patient Emotional Journey Analysis helped a multinational pharmaceutical brand, operating in the Multiple Sclerosis (MS) market, gain a deeper understanding of the emotions, motivations and challenges experienced by MS patients.

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Introduction: Social Listening in Pharma and Life Sciences

In recent years, the pharmaceutical companies have realised the need to adjust to the dynamic digital landscape and the technology driven shift from the passive to the empowered patient. Where focus groups and consumer surveys were once the go-to research methods, the industry is now actively exploring new techniques to gather patient insights.

With patients – as well as caregivers and HCPs – turning to social media and forums to connect with peers, share their experiences and exchange advice, it's no surprise that an increasing number of pharma marketers have discovered the benefits of tapping into these digital channels to better understand patient perceptions and experiences. In many cases, primary market research has now become replaced, or supplemented, by social listening as a research method.

Learn how Convosphere's patient-centric, multilingual social listening can be used to map the Patient's Emotional Journey across markets and therapy areas, and how this can provide researchers with a deeper understanding of the emotional impact of the disease and treatment.

Understand the drivers and barriers of patients to inform your customer engagement strategy

Why should you map the Patient's Emotional Journey?

- While tool-based sentiment is useful for providing a high-level overview of conversation tone, it is a blunt instrument and unable to grasp the nuance of human conversation. Fluent across a range of social listening platforms, our skilled analysts have the experience and expertise required to identify and deliver insights that matter.
- Patient Emotional Journey Analysis goes deeper into the social listening data to answer the 'why' of the stakeholder conversation themes and topics, to help you to prioritise and strategise your communication.
- Patient Emotional Journey Analysis will ensure you gain a deeper understanding of the issues driving patients' motivations and feelings in order to answer your key business questions.

Emotional insights go beyond automated sentiment, to help answer your key business questions

Causes

Pre-Diagnosis

Diagnosis

Treatment

Management

Remission

Relapse

Example business questions:

- How do patients **perceive their treatment options** and what matters most to them?
- Why do some patients become **non-adherent or switch** from one treatment to another?
- How can we **identify and break through** treatment adoption barriers?
- How can we **uncover patients’ unmet needs**, and the drivers or barriers to addressing them most effectively?
- Where are the **inflection points** by the stage in the journey which provide the opportunity to impact perception or behavioural changes?

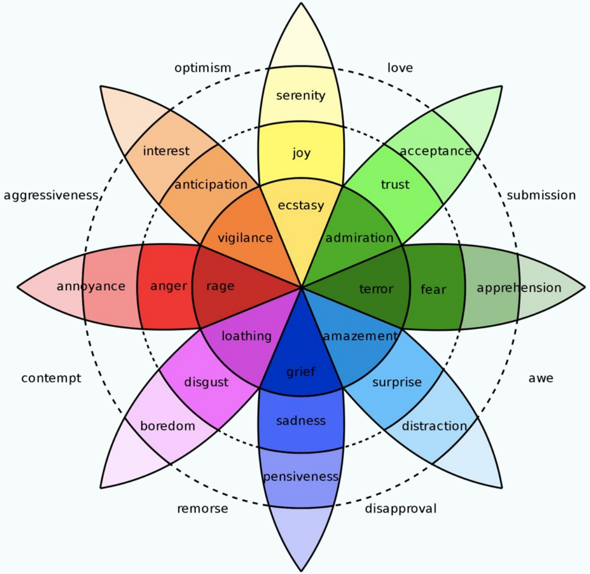
Convosphere's native speaking in-country analysts go beyond sentiment analysis by using an emotional analysis framework for insight at a deeper and culturally relevant level

Eight point scale

To categorise the emotions expressed in stakeholders' conversations, our analysts refer to Plutchik's Wheel's eight point scale of emotions. The eight points of emotions relate to the pain points and feelings identified in each journey stage.

Multilingual and global team

We use pharma-experienced and in-country native analysts to explore the conversation data and find the insights. With a team spread across the globe, our approach allows both language and culture to inform the outcome.



> *I have* ***multiple sclerosis*** *and by looking at me you wouldn’t know since it’s typically an invisible illness. I've had people suggest yoga and eating only fish.....like fish is really going to fix the fact my immune system doesn’t do its job properly. I've also at one point* ***had to use a cane*** *and I've gotten so many dirty looks and people telling me that I'm not old enough to be using one.*

Patient, Forum

Stakeholder conversation overview

Patients and caregivers use social media to give and receive emotional support from online communities, while HCPs focus on knowledge-sharing.

Patients
(77% of conversation)

- Are most likely to post on **Twitter**
- Use social media to **share their personal experiences**
- Are most engaged with the subject of their **symptoms and treatment**

HCPs
(14% of conversation)

- Are most likely to post on **Twitter**
- Use social media to **post news around research and clinical trials**
- Most likely to share research into **secondary progressive MS**
- Maintain a **professional approach** to the subject, engaging in a matter-of-fact manner

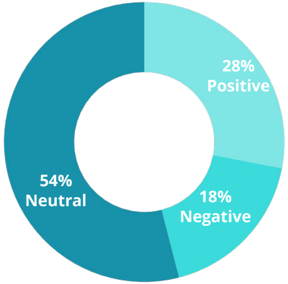
Caregivers
(9% of conversation)

- Are most likely to post on **Forums**
- Key emotions expressed are **worry and sadness** for their loved ones
- Provide **support and advice** to peers in online communities
- React **optimistically** to stories about medical advancements

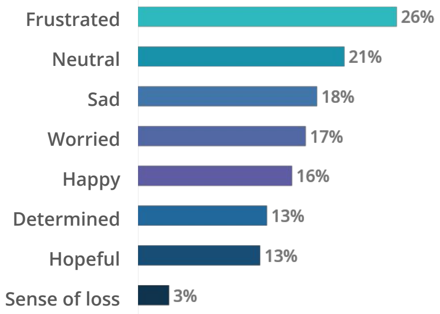
Sample size: Key Stakeholders = 500 | MS = Multiple Sclerosis | Country: US

Emotional analysis in MS provides greater depth than quantitative sentiment analysis

QUANTITATIVE SENTIMENT ANALYSIS

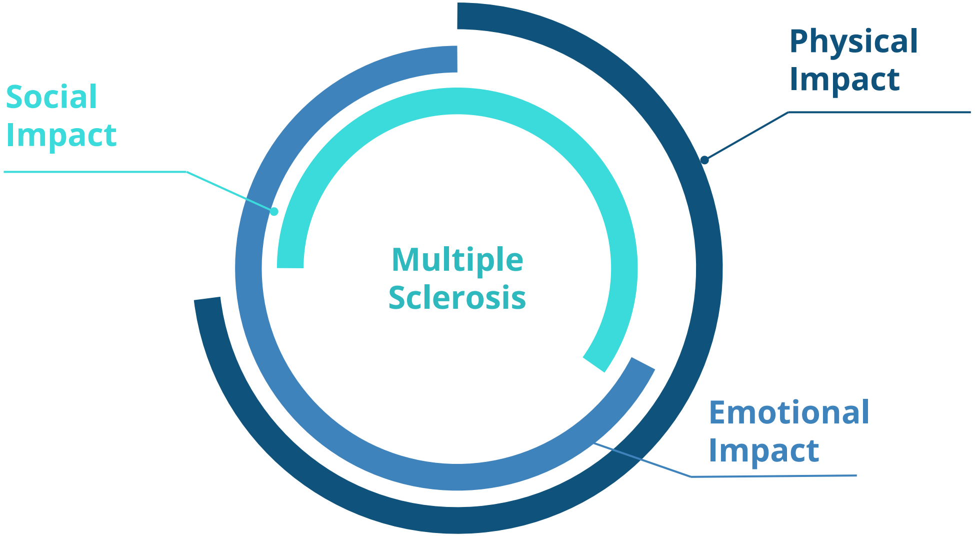


EMOTIONAL ANALYSIS



- Through emotional analysis we were able to identify specific emotional cues in around **80% of patient/caregiver posts**, along with the variations in the way people expressed their emotional state.
- This gave us a significant advantage when deep-diving into emotional challenges, such as **frustration during the diagnosis and management stage**, which is when the need for support from the medical community and peer groups peaks.

Being unable to physically complete everyday tasks takes a social, emotional and physical toll on patients



The strain of MS symptoms and financial concerns make patients feel depressed, anxious and frustrated

EMOTIONAL IMPACTS OF LIVING WITH MS

- Patients suffered from **depression, anxiety and stress** caused by MS symptoms, and financial issues linked to the condition, e.g. treatment costs or a lack of insurance/income.

- They felt **frustrated** about losing control of their bodies and their reliance on medication.

- Those in the pre-diagnosis stage were concerned over the potential physical, financial and emotional **implications of a diagnosis**.

- Some were **optimistic** about a future cure, while others were **fearful** and worried that they might "**die a miserable, painful death**".

- Caregivers were **scared of losing their loved ones and felt helpless**.

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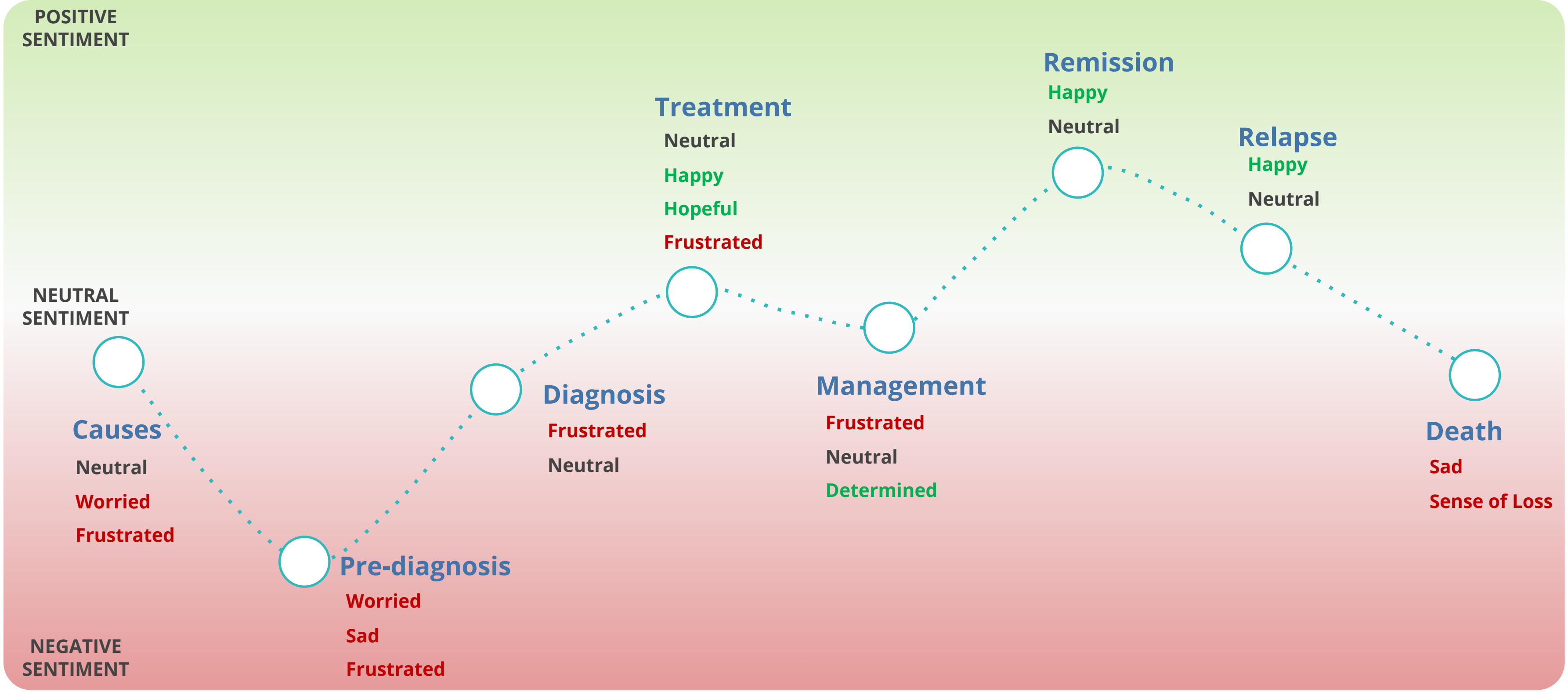
MS limits professional opportunities and the development of intimate relationships, with patients feeling judged and misunderstood

SOCIAL IMPACTS OF LIVING WITH MS

- Patients felt they were unable to pursue their **professional careers** and struggled in sexual relationships.
- Patients **faced difficulty accessing disability payments or unemployment support** from the government.
- **External judgement** from those who do not understand MS and its symptoms put up social and emotional barriers for patients.
- Some patients felt that a **lack of services** restricts their “normal” lives. Ridesharing drivers objected to forced scheduling, while patients’ travel plans were especially difficult (e.g. using Uber, difficulty travelling when there are adverse weather conditions).

Patients are most dejected during the pre-diagnosis stage, worrying about their symptoms and access to healthcare



POSITIVE SENTIMENT

NEUTRAL SENTIMENT

NEGATIVE SENTIMENT

Causes
Neutral
Worried
Frustrated

Pre-diagnosis
Worried
Sad
Frustrated

Diagnosis
Frustrated
Neutral

Treatment
Neutral
Happy
Hopeful
Frustrated

Management
Frustrated
Neutral
Determined

Remission
Happy
Neutral

Relapse
Happy
Neutral

Death
Sad
Sense of Loss

Chart reflects an average sentiment score, based on share of positive, negative and neutral mentions at each stage
n = 323 | MS = Multiple Sclerosis | Country: US

Patients are often frustrated when seeking a diagnosis, sensing that HCPs fail to take their symptoms seriously

The pre-diagnosis stage was mentioned in 6% of posts

The most common themes in patient posts at this stage were:

- Concern about their symptoms and **the impact of a diagnosis of MS** on their lives.
- **Concern over the cost** of diagnostic tests and treatment.
- **Seeking advice and opinions** from others on MS-related forums.
- **Frustration with HCPs**, described as disengaged and unwilling to consider an MS diagnosis.
- Sharing their **patient journey**.

EMOTIONAL LANDSCAPE

The standout emotions during pre-diagnosis were:

- **Worry** about symptoms and financial concerns
- **Sadness** about the potential impact of a diagnosis on a patient's future
- **Frustration** with medical professionals and the healthcare system

> *It's tough because my doctor initially doubted me when I suggested it but he also kind of* ***half listened to symptoms*** *I explained in appointments. I sent him an update on all my symptoms via message recently and he wanted to see me as soon as possible [...]* 🙄 ***Sometimes I feel like I'm crazy until I realize that the person I'm talking to isn't listening***.

Patient - Reddit

The feeling that HCPs are letting their patients down carries through to the diagnosis stage, where posts reflect frustration with the inefficiency of the process

The diagnosis stage was mentioned in 17% of posts.

Themes in the social media conversation at this stage:

- The most referenced diagnostic tools were **MRI/CT scans** and **spinal taps**
- **Frustration** was the most prominent emotion, stemming from:
  - The feeling that their journey to diagnosis was **inefficiently handled**
  - The **impact of symptoms** on patients' day-to-day lives
- Some patients mentioned being diagnosed when they had received **emergency hospital care** due to their symptoms.
- Receiving a diagnosis generated a **sense of relief** among patients as it allowed them to start treatment.

EMOTIONAL LANDSCAPE

The standout emotions during diagnosis were:

- **Frustration** with medical professionals who caused delays in the journey to diagnosis by failing to take symptoms seriously or conduct proper testing
- **Neutral** reporting of the steps they took before receiving their diagnosis
- **Sadness/Worry** over what the diagnosis could mean for their future

> *For me to go from the label 'unknown neurological condition ' to 'proven multiple sclerosis patient' was a* ***great sense of relief****. With that label I've been able to adjust my life accordingly, cope with early retirement on medical grounds and live a* ***rich and rewarding life****; another story [...] With a positive attitude, like many health conditions,* ***it can be managed*** *and your lifestyle adapted for the good.*

Patient - Reddit

Effective pharmacological treatment drives an uptick in positive feelings, with cannabis doing the same for a vocal subset of patients

The treatment stage was mentioned in 49% of posts

The conversational landscape around MS treatment reflected an upturn in patient emotions:

- **Pharmacological treatments** were the most frequently mentioned, particularly oral medications and IV infusions.
- The most common emotion at this stage was **happiness**, with stakeholders referencing:
  - **Receiving effective treatment**, which boosted their quality of life.
  - The potential of **ongoing and future research** uncovering superior treatments.
- HCPs posted news about potential treatments, but **rarely shared their own opinion or experiences**.
- A vocal subset of patients expressed that **cannabis** was the only treatment form that helped them feel better.

EMOTIONAL LANDSCAPE

The standout emotions during treatment were:

- **Neutral** reporting of the details of treatment/passing mentions
- **Happiness** over beginning treatment, finding treatment to be effective, and being selected for clinical trials
- **Hope** that treatment will be effective and that there will be significant developments in MS treatment in the future
- **Frustration** over a barriers to accessing treatment, such as cost and/or inadequate health insurance coverage

> *It's #GratefulPatient Day & I'm grateful that after a diagnosis of #MS in 1986 when there were NO medications now there are more & more choices of approved meds for our community.*
>
> Patient - Twitter

Patients appreciate techniques which help to lessen the severity of their condition, but are wary of the perception that they can control their symptoms

The management stage was mentioned in 20% of posts.

The most discussed forms of disease management were:

- **Dietary changes** – some patients found diet improvements to be an **effective tool** in managing their MS, while others saw no change. However, it was generally acknowledged that an unhealthy diet would worsen symptoms in the long term.
- **Coping techniques** – non-strenuous hobbies, such as **knitting and tabletop war games**, helped patients to adapt to their illness. **Online communities** were also a significant support.
- **Physical Activity** – Patients discussed exercise as a pivotal tool in managing their illness, saying it helped to offer a temporarily relief from symptoms, and restrict the progression of their condition.

EMOTIONAL LANDSCAPE

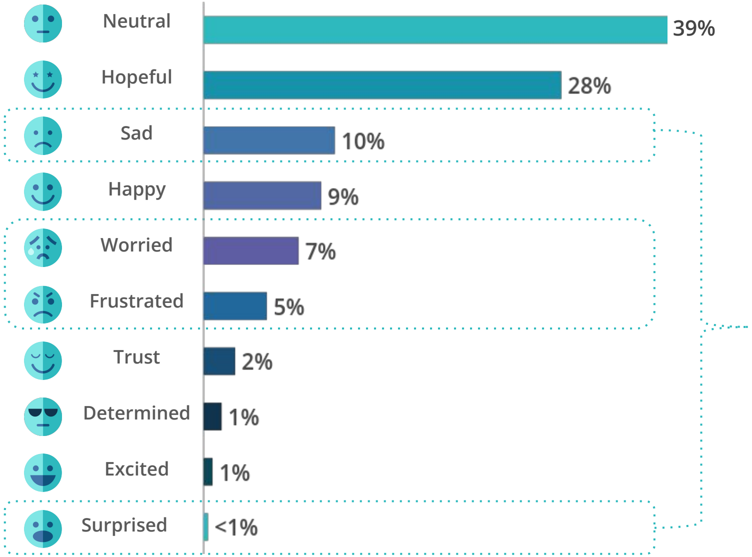
The standout emotions during MS management were:

- **Frustration** over unsuccessful attempts to manage the illness, and with people failing to understand patients' lack of control over their condition
- **Neutral** mentions of current and former attempts to manage their symptoms
- **Determination** to establish some level of control over symptoms

> *I have multiple sclerosis and by looking at me you wouldn't know since its typically an invisible illness. I've had people suggest yoga and eating only fish.....like fish is really going to fix the fact my immune system doesn't do its job properly. I've also at one point had to use a cane and I've gotten so many dirty looks and people telling me that I'm not old enough to be using one.*

Patient - Reddit

The high cost of biologic treatment is a stress factor for patients, while side effects and inefficacy leave them feeling frustrated and sad



- People felt **worried** about the side effects associated with biologics, sometimes enquiring about these online before commencing treatment. Experiencing side effects made them feel worried and **sad**.
- Some were **frustrated** by how long the medication took to have any impact for them.
- Treatment was ineffective for some patients, leading them to feel **frustrated** and sad.
- A few patients were unpleasantly **surprised** to discover the high cost of Ocrevus.

Sample size: Emotional Journey = 284
MS = Multiple Sclerosis
Country: US

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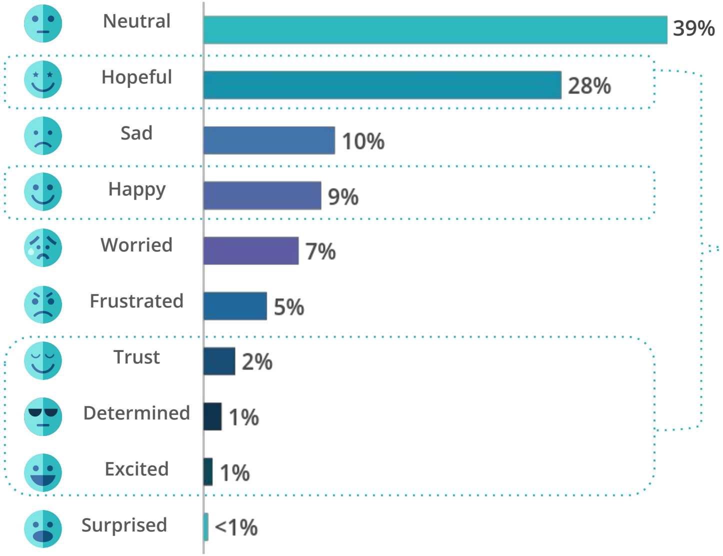
Patients are optimistic that biologic treatments could help them to better control their MS, and happy when their treatment proves effective



- Patients often described Ocrevus as the most aggressive yet effective treatment, expressing **hope** that the medication would work for them.
- Patients were **happy** when the treatment was effective and without side effects.
- Patients expressed a sense of **trust** in these medications.
- Patients were **happy** when their biologic treatments were approved, and a few **anticipated** their next infusion session.

Sample size: Emotional Journey = 284
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About Convosphere

Headquartered in London, UK, Convosphere is a **social-first insights agency**. We recognise that the value of global social listening lies in the impact data-driven decisions can make – and the cultural relevance required to make them actionable. Through **hands-on human-led social data analysis across 45+ languages**, and with offices around the world we have unprecedented data access into hard-to-reach markets where we can deliver deep consumer insights that bring **our global clients closer to local audiences**.

Our mission is to support Agencies and Enterprise in answering business questions and developing actionable customer insights globally. Our job is to **make your strategic social listening efforts scalable and successful**. Our Social Listening Analysts work with your project team to extend your company's language and analysis capabilities on a project or hourly basis.

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