Caregiver---Gatekeeper or Patient: A Dual Opportunity

Mary Ellen Carroll
Product Manager, Wyeth

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Today’s Agenda

- Demographics Impacting Health Landscape
- Growth Of Chronic Disease
- Understanding Caregivers
- Opportunities Facing Life Science
Society Will Continue To Change

1959

2009

2050

Source: Google & Getty Images

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US Population Is Rapidly Aging

6,000+ Americans Celebrate their 65th birthday Daily!

Sources: US Census Bureau; Silverbook.org.lib.php on line 990 Alliance For Aging Research 1999
Seniors Will Be The Only Group To Grow

**2010**
- Under 18 years: 27%
- 18 to 24 years: 26%
- 25 to 44 years: 27%
- 45 to 64 years: 24%
- 65 years and over: 13%

**2050**
- Under 18 years: 20%
- 18 to 24 years: 23%
- 25 to 44 years: 25%
- 45 to 64 years: 23%
- 65 years and over: 20%

Prevalence Of Chronic Conditions Continues To Rise


The Silver Book: Chronic Disease and Medical Innovation in an Aging Nation
Moving Beyond 2010, Growth Of Chronic Conditions Will Rise

Projected Rise In Seven Most Common Chronic Disease
2003 - 2023

Physicians May Be Unprepared To Advise Patients On Ancillary Health Issues

- Over half of physicians believe their training did not adequately prepare them to:
  - Coordinate in-home and community services
  - Educate patients with chronic conditions
  - Manage the psychological and social aspects of chronic care
  - Provide effective nutritional guidance
  - Manage chronic pain

Source: National Public Engagement Campaign on Chronic Illness
Caregivers
What Is A Caregiver?

A caregiver refers to anyone who provides assistance or help to someone who may be incapacitated...

- **Informal caregiver & family caregiver** are terms that refer to unpaid individuals such as family members or friends. They work full & part time and can live with or apart from their patient.

- **Formal caregivers** are paid care providers associated with a service system.

Source: Family Caregiver Alliance. This fact sheet was prepared by Family Caregiver Alliance in cooperation with California’s Caregiver Resource Centers and funded by the California Department of Mental Health. © 2001 Family Caregiver Alliance. Revised 2005. All rights reserved. FS-SCS200506. http://www.caregiver.org/caregiver/jsp/content_node.jsp?nodeid=439
Facts About Caregivers Today.....

- Often sustain people with disabilities
  - 44 mm provide care
  - 37.1 billion hrs. with $306 billion annual value

- Caregivers for loved ones 65+ tend to be female and family-members
  - 41% child
  - 27% other relative
  - 23% spouse

- Range of ethnicities

- Often ill-prepared for role
  - Often suffer from poor health too
  - 60% work full/part time too

Source: National Family Caregivers Alliance 2009 National Policy Statement
Caregivers Provide A Range Of Assistance
What Is The Impact Upon Caregivers?

- Stress & Guilt
- Health

My Home
- Finances
- Daily Activities
- Partner
- Work
- Kids
- Home

Loved One
- Appointments
- Health
- Safety
- Personal Care

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What Is The Health Status Of The Caregiver Today?

- Lower levels of self-care
  - 60% have fair to poor health
  - 50% do not keep up with doctor visits/tests
  - 70% believe their physical & emotional health are fair to poor

- Chronic conditions include: heart disease, cancer, diabetes, arthritis, obesity
  - Nearly half show clinically significant symptoms of depression
  - Increased physical ailments, acid reflux, pain, & diminished immune systems

Marketing Implications
Situation: Health Status Of Caregivers Is Crucial

- **Landscape shift**
  - Older population, living longer
  - Less family caregivers
  - Diversified population

- Healthcare system will face an increased burden with the rise of chronic conditions
  - Family caregivers may be impacted

- Family caregivers represent a dual role
  - “Gatekeepers” for their loved ones
  - Patients themselves
Marketing Implications

- **Develop** programs that
  - expand *from* solely patient driven insight *to* a more holistic view that includes the caregiver

- **Deploy** programs that
  - involve caregivers
  - insure HCPs are prepared for caregiver engagement and patient dialogue

- **Evaluate** programs that
  - go beyond obvious patient and HCP-centric metrics and consider the impact of caregivers
Develop Marketing Initiatives

- Incorporate insights of *both* patient and caregiver
  - Understand the “relationships”, roles and influences
  - Utilize innovative research techniques and engage with caregivers:
    - Consumer Influence Study
    - Ethnography
    - Behavior Pathway To Treatment
    - Emotional Drivers
Deploy Marketing Campaigns

- Tools to help HCPs and/or nurses engage with caregivers

- Programs to reach *both* patient and caregiver

- “Opt-in” databases to capture needs for the patient and caregiver
Emerging Learning

- Among patients and caregivers
  - Assess the opportunity within consumer base
  - Understand their co-morbidities
  - Offer “opt-ins” within sites and databases
  - Cross divisional -- Rx and OTC
  - Hemophilia: Mom was caregiver but wanted information on women’s healthcare
    - Cultivate a relationship with education

- Stopsilentsuffering.com
  - Late stage illness and constipation associated with prescription pain relievers
  - Caregiver-directed communication reinforces patients needs
  - *Speaks to the “caregiver”*
Is Someone You Love Suffering in Silence?

When a loved one or someone you know is going through a progressive late-stage illness, your focus, naturally, is on helping them with their condition. A common side effect of certain prescription pain relievers is constipation that can be debilitating — and difficult to talk about. But even if they remain silent you can speak about it for them. You can be their voice.

If you suspect that the person you’re caring for is experiencing constipation caused by certain prescription pain relievers, it may be easier for them to identify symptoms from a list than it is to openly describe what they’re experiencing. And you know how important it is to try to help with their condition. So, please download the Constipation Symptoms Checklist, review it and share it with your loved one. You can then bring the checklist into the doctor’s office and he/she can discuss it.
The End