

Accenture Life Sciences

Rethink Reshape Restructure...for better patient outcomes

Patient Services – Pharma's Best Kept Secret

Accenture Research Note: Key findings from a survey of 10,000 patients around the world



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An Accenture survey of 10,000 patients from the United States, United Kingdom, France, Germany and Brazil examined their unmet needs in seven different therapeutic areas across the entire patient journey. The survey overwhelmingly revealed that patients **want more services before they are treated** for a disease, regardless of disease type. In addition to this, the vast majority of patients are **not aware of the services available to help them**. In the limited number of cases where patients are aware of a service, they **use them across all therapeutic areas** surveyed. The survey also unveiled that the majority of patients consistently **want their healthcare professional(s) to be the primary source of information on the services** they need to manage their health—and consider digital as a primary channel to receive such services.



Are patient services pharma's best kept secret?

As our 2014 survey of 2,000 US patients uncovered, patients expect pharmaceutical companies to provide services that help them manage their health.¹ But where across the patient journey are services most wanted? What are patients' greatest frustrations and concerns? Where do they see clear gaps in services? And do patients with different types of diseases want different services? These are just a few of the questions that Accenture's 2015 survey of 10,000 patients in the United States, United Kingdom, Germany, France and Brazil addressed.

This survey revealed several eye-opening results and insights. First, it revealed that patients want more help and guidance BEFORE they begin being treated for a disease with their greatest frustration being lack of notification of being "at risk" for a condition. Second, it found that

the majority of patients are not aware of the services available to them across the patient journey. In fact, less than one in five patients (19 percent) are aware of services available to them.

The good news is that once patients are aware of the services available, the majority use them. The survey further revealed that regardless of disease or therapeutic area, patients highly value the services provided and therefore are likely to continue to use them.

The survey also revealed that nearly every patient wants one point of contact to find out about the services available to them—ideally through their healthcare professional(s). Yet many, if not most, pharmaceutical companies are going straight to patients to offer their services.

These findings beg the questions:

- Are pharmaceutical companies missing a significant opportunity to provide services at the earliest possible point in the patient journey—before they are even being treated for a disease?
- And could pharmaceutical companies greatly increase patient awareness of services if they better engage with healthcare professionals to inform patients of the available services?

The answer to both questions appears to be a resounding yes.

1. "Great Expectations: Why Pharma Companies Can't Ignore Patient Services," Accenture 2014.



Key Finding 1:

Patients want more help *before* they are being treated.

What if patients could be empowered to better determine their own risk profile? And what if physicians could better identify the people who are most "at risk" and make them aware of a range of services available to support them prior to being diagnosed?

The timing of where patient services are provided across the patient journey emerged as a critical issue for patients. Our global survey found that nearly two-thirds (65 percent) of all patients surveyed said that the pre-treatment interval is the most frustrating period for them (see Figure 1).

Their single biggest frustration is the lack of notification of being at risk for a condition. The global survey found that 34 percent of patients across all therapeutic areas were frustrated that they had little warning that they could be diagnosed with a condition (see Figure 2). This percentage rose to 44 percent for patients surveyed with immune diseases.

This key finding makes complete sense from the patient's perspective. Prior to diagnoses, people often don't know that they might be at risk for a particular disease. Once symptomatic, they may be confused and anxious about the symptoms they are experiencing, with fear of the unknown. They typically have many unanswered

questions and are often unclear as to where to go or whom to ask for help, which can lead to significant delays in seeking proper medical attention. A combination of these factors can lead to a late diagnosis, delays in appropriate medical intervention and treatment has implications to patient and healthcare system costs.

As patients begin the process of trying to understand what they are at risk of, what their symptoms might indicate or evaluating potential treatments, they want a great deal of information quickly on everything from an understanding of how "at risk" they might be to potential interventions and treatment options. This is the stage at which our survey indicates patients are most receptive and willing to engage. Yet many pharmaceutical companies are targeting services later in the care cycle, after a patient starts treatment indicating missed opportunities for earlier and better patient engagement.

Figure 1. Pre-treatment consistently is the most frustrating time for patients.

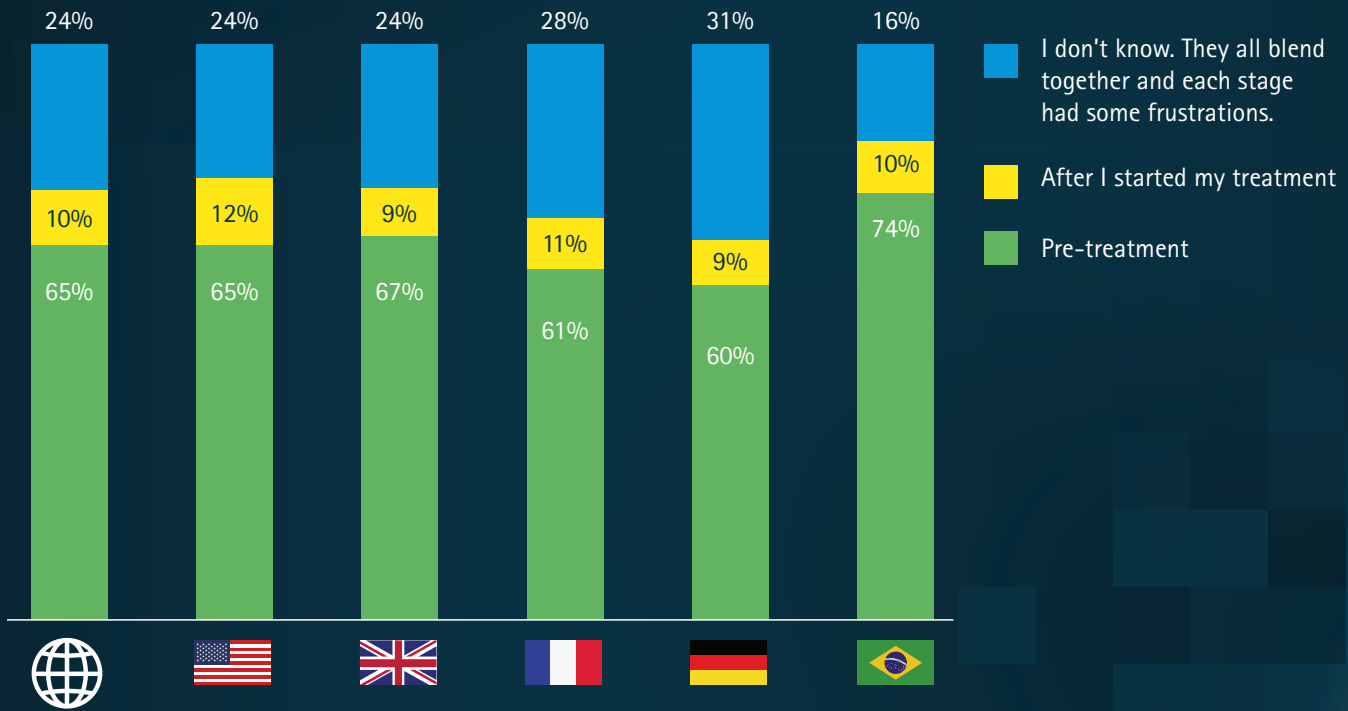
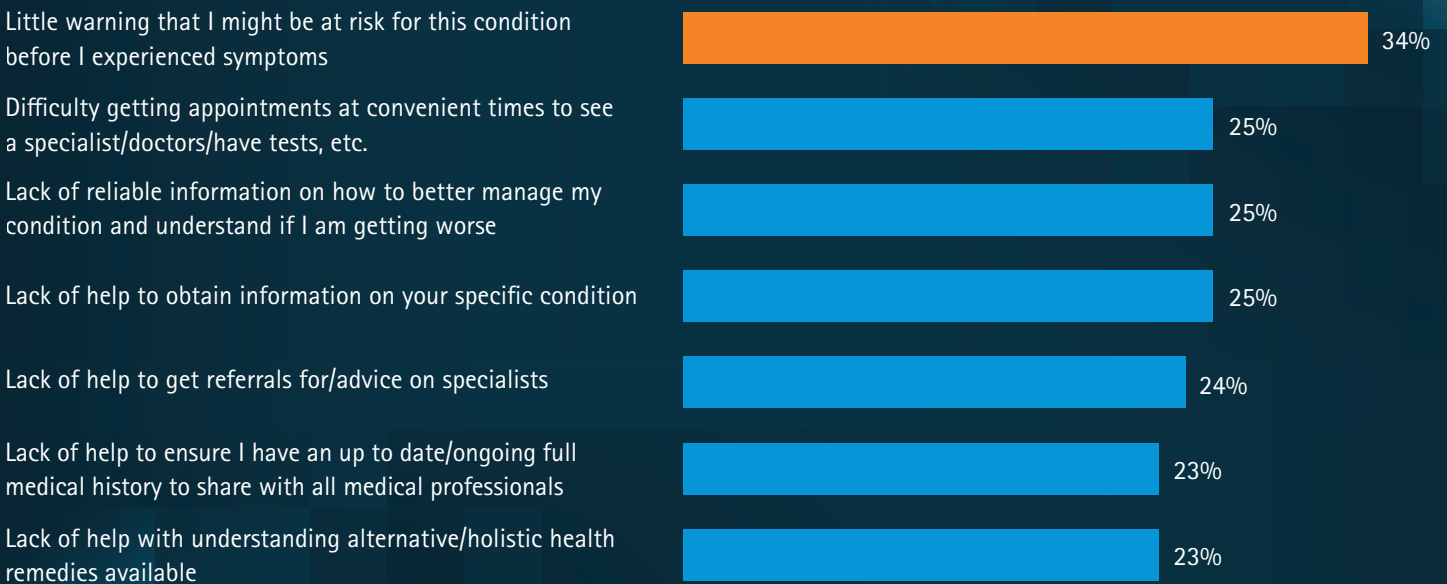


Figure 2. Patients' greatest frustration is little notification of being at risk for a condition.



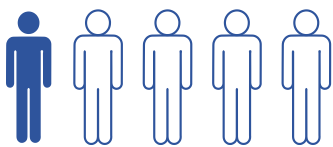


Key Finding 2:

Patients are generally not aware of the services that are available to help them.

Our global survey of 10,000 patients found that less than one out of five patients (19 percent) are aware of the services available to them.

<1 in 5

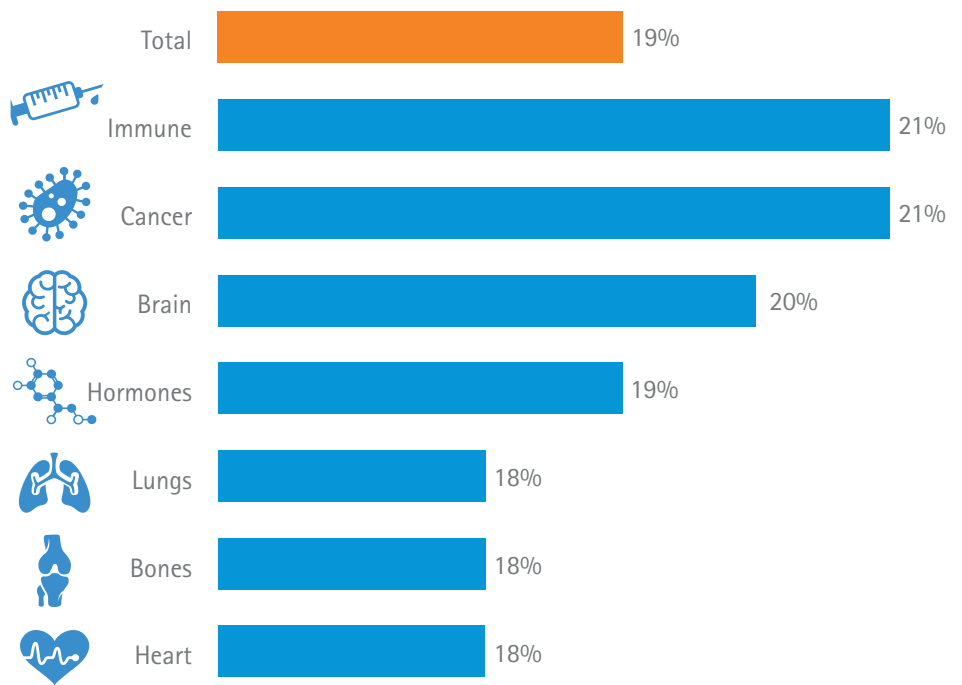


Between news reports of the latest clinical studies, profiles of surgical breakthroughs and coverage of health-related threats, it may seem like every media channel and platform provides a steady stream of health information around the world. But the opposite is apparently true when it comes to patient services. Our survey found that on average, less than one out of five patients (19 percent)* are aware of the services available to them (see Figure 3). What's more, awareness is low across all therapeutic areas, ranging from a low of 18

percent for bone, lung and heart conditions to a slightly higher 21 percent for cancer and immune diseases.

What accounts for this low awareness of patient services? Many pharmaceutical companies are spending hundreds of millions of dollars to develop patient services, and seeing only minimal uptake. If patients are not aware of a service, there is simply no chance they are going to use it. What is clear right now is that the message that services are available is not getting through to many patients.

Figure 3. Most patients are unaware of the services available to them across all disease states.



*Aggregated average across all services



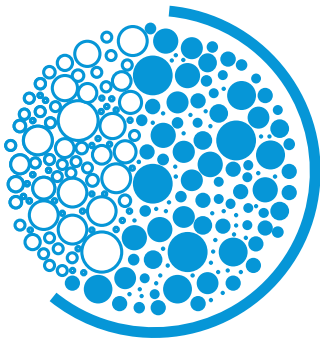
Key Finding 3: When patients are aware of services, they use them.

The opportunity to reverse such low awareness of patient services is particularly compelling because patients who are aware of patient services do in fact use them. Our survey found that nearly six out of 10 patients (58 percent*) use services when they are aware of them (see Figure 4). While usage of specific patient services varies, utilization is still generally high across all services provided. Within the survey population, the use of services ranged from a high of 69 percent

for services that helped patients obtain information on a condition, to a low of 47 percent for information on support groups (see Figure 5).

Additional insights can be drawn from the size of the gap between awareness and usage of different services. In almost all cases, the higher the awareness, the higher the usage, which suggests a swelling effect as more patients become aware of services generally, more are inclined to use them.

Figure 4. Nearly six out of 10 patients use services when they are aware of them.

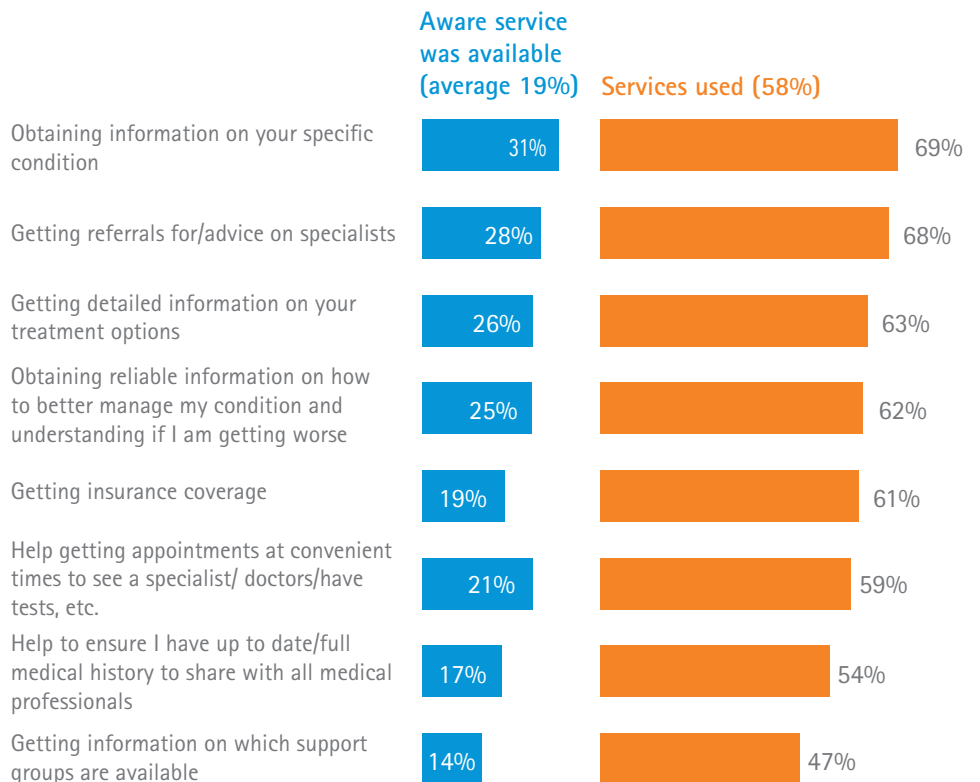


58%

Nearly six out of 10 (58%) patients use services when they are aware of them.

*Aggregated average across all services

Figure 5. Usage varies but is still generally high across all services.





Key Finding 4: Patients value services across all disease states.

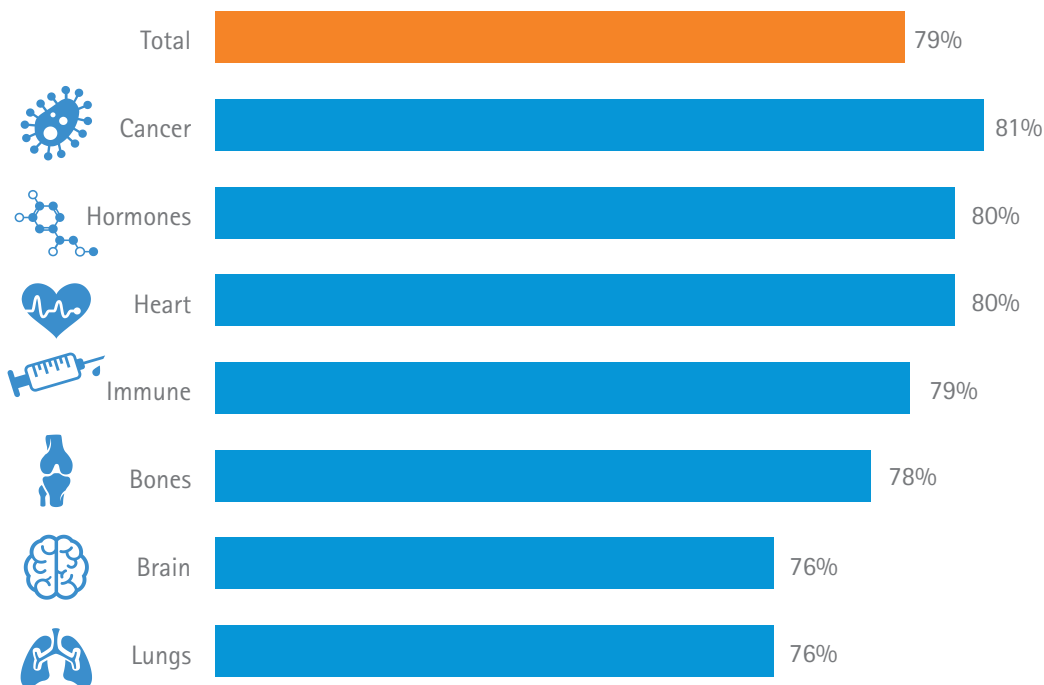
Patients not only use the services once they are aware of them, but they also find great value in the services that they use—no matter what health condition they are facing. The vast majority (79 percent) of survey respondents said that the services they used were “very” or “extremely” valuable (see Figure 6). This high level of satisfaction is seen across all disease states,

with patients contending with diagnoses that range from life-threatening in the cases of cancer or heart problems, to chronic conditions such as auto-immune or hormonal disorders.

Pharmaceutical firms that have invested in patient services can take pride in the fact that once patients use the services

they are offering, there is a high level of appreciation of them. This fact highlights the opportunity for pharmaceutical companies to utilize services in combination with their products to become a much more trusted and respected partner in the healthcare system that is helping deliver better outcomes for patients.

Figure 6. Value is high across all therapeutic areas.



*Aggregated average across all services



Key Finding 5:

Patients want their healthcare professionals to be the primary source of information on services they need to manage their health, but digital channels play a key role as well.

An overwhelming majority of patients (87 percent) stated they wanted a single point of contact to provide a service to help them manage their condition. The vast majority (85 percent) would like that to come from their healthcare professionals. Only six percent would seek information about services from their insurance company, while that number drops to one

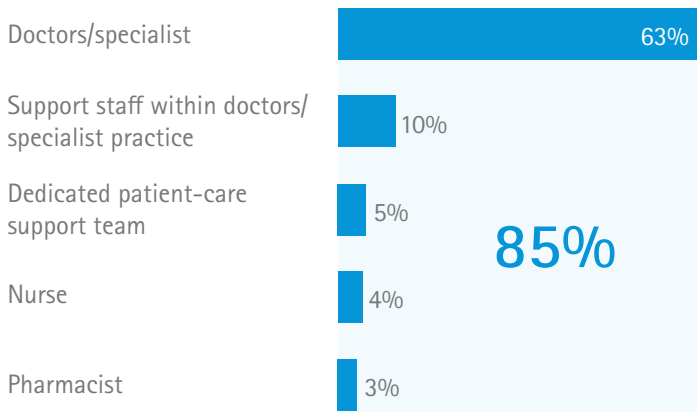
percent for pharmaceutical companies (see Figure 7). Could this one percent increase to 85 percent if pharmaceutical companies marketed their services directly to healthcare professionals who in turn present them to patients?

While in-person visits with doctors remain the top means from which patients gain

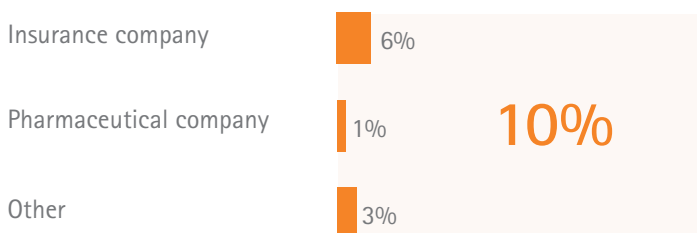
information (67 percent), digital channels are gaining ground and are a close second, mentioned by 57 percent of respondents. Further, younger individuals (18–30 years old) are even more receptive to digital channels with 62 percent ranking them in the top three preferred sources of information (see Figure 8).

Figure 7. The vast majority of patients want one point of contact to help them manage their health—ideally their healthcare professionals.

Healthcare professionals



Others

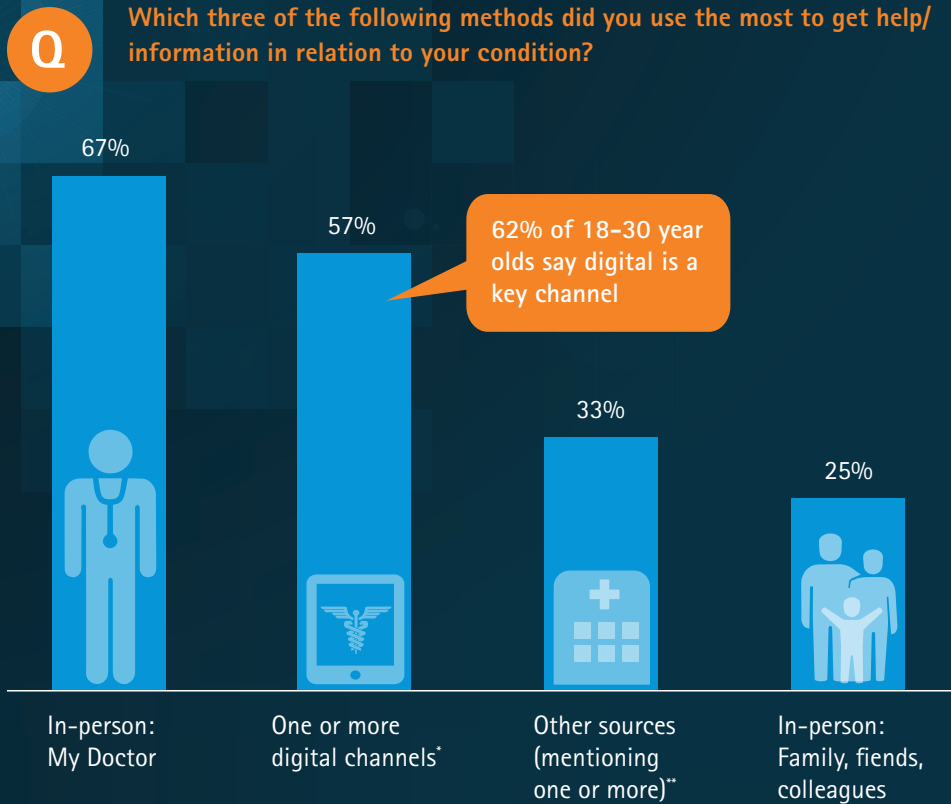


Results by Country

	Healthcare professionals	Other (including insurance and pharma companies)
Total	85%	10%
	88%	7%
	88%	9%
	87%	10%
	86%	5%
	72%	25% (insurance 19%)

Insurance companies mentioned more in Germany

Figure 8. Doctors are one of the top information sources for the majority of patients with digital a close second.



* Percentage of respondents that mentioned one or more digital channel, including medical websites and online communities

** Percentage of respondents that mentioned one or more other source, including books, magazines

Base: Total Respondents (10,000)

So what do these findings imply for pharmaceutical companies?

Our survey unveiled that there is clear opportunity for pharmaceutical companies to increase their value to patients by increasing awareness, and ultimately use of patient services—and to start doing so much earlier in the patient journey.

Specifically, pharmaceutical companies should:

Implication 1:

Consider offering pre-treatment services to become the "go to" resource from the start of the patient journey.

Pharmaceutical companies are missing a significant opportunity to provide services to patients prior to beginning treatment. This is when patients' greatest unmet need, and the opportunity for education and engagement, is highest.

By filling a gap in services during the pre-treatment interval, pharmaceutical companies can become the "go to" resource from the start of the patient journey for a particular therapeutic area. This earlier intervention gives companies a much stronger foothold to be able to continue in that capacity throughout the patient journey after treatment begins.

Those who stake this claim early are very likely to secure a first-mover advantage making it much harder for other companies to break in. What's more, just providing patient services at distinct parts of the patient journey versus throughout the entire journey limits effectiveness and creates an opening for competitors to enter and gain patient attention and loyalty.

Those who stake this claim early are very likely to secure a first-mover advantage making it much harder for other companies to break in.

We have heard some pharmaceutical executives express concerns about market saturation for patient services in the United States. But this is in direct contrast with patients' view with the vast majority being unaware of available services. If anything, they would like to hear more about services and receive them earlier in their course of care. Until pharmaceutical companies take action to raise awareness and utilization, it is difficult to argue that saturation is truly a problem.

Meanwhile, in Europe, we see payers increasingly requesting a product plus patient services strategy from pharmaceutical companies. This request is likely to become more of a requirement moving forward that will make patient services not just a "nice to have" but a "must have" for pharmaceutical companies.



Implication 2:

Consider targeting key healthcare professionals to increase patient awareness of available services.

Most pharmaceutical firms have marketed services directly to the patient rather than engaging healthcare professionals in the process. On some level, this approach is understandable since patients are the ultimate end user.

Yet, our survey clearly showed that healthcare professionals—doctors in particular, but also specialists, nurses and pharmacists—are viewed as the primary trusted advisors by most patients. As such, they are best suited to direct and make patients aware of these services because when patients hear about the available services from their healthcare professionals, they are much more likely to view the services as legitimate and valuable.

That said, everyone knows healthcare professionals are extremely time-constrained. Typically, patients with long-term chronic conditions consult their healthcare professionals three to four times per year^{2,3,4}. The average consultation time is about 15 minutes^{5,6}. This means healthcare professionals have a total of about one hour to change and influence a patient's health status within a full year.

Patient services represent a significant opportunity to support both patients and healthcare professionals beyond the in-person consultation window through all intervals of the patient journey.

Pharmaceutical companies should see services not as a "nice to have" addition, but as part of their long-term core branding and value proposition.

Pharmaceutical companies can make this happen by enlisting their salesforce who are already meeting with healthcare professionals. Instead of talking primarily about the product, the salesforce can focus discussions on desired patient outcomes and how the combination of the pharmaceutical company's services and products helps patients achieve those goals.

This approach will likely require some "retraining" of the salesforce, but when healthcare professionals are convinced that a service fills a real need for patients and adds value to current treatment approaches, the service plus product combination can be viewed as an important, if not essential, component of care. This repositioning from providing a product to helping deliver improved patient outcomes provides an unprecedented opportunity for pharmaceutical companies to become a much more trusted adviser in the healthcare ecosystem.



2. The number of visits is dependent on age and the number of chronic conditions the patient is effected by.

3. <http://www.cdc.gov/nchs/data/databriefs/db161.htm>

4. <http://www.cdc.gov/nchs/fastats/physician-visits.htm>

5. <http://kaiserhealthnews.org/news/15-minute-doctor-visits/>

6. <http://en.wikipedia.org/wiki/Doctor>

Implication 3:

Consider investing as much in the communication and coordination of the services as you do in building them.

Many pharmaceutical companies are pouring millions of dollars into developing and launching services to patients and assume their work in "providing" a service is done, especially if competitors are doing the same thing. However, our survey demonstrates that despite this investment, awareness of services is extremely low and leading to significant unmet patient need.

Pharmaceutical companies have a tremendous opportunity to rethink how they are bringing these services to the market. The investment needs to shift from not just building them, but in how they market, communicate and coordinate with healthcare professionals. Conversations with healthcare professionals need to shift from products to the overall patient value and better outcomes that can be achieved through the combination of products and services.

This shift to patient value and outcomes has significant implications to the entire life cycle of a product—from product launch to maturity—as well as the patient journey—from pre-treatment all the way through ongoing treatment or resolution.

"Improved patient outcome and value are fundamental principles for the NHS. Any patient service partner, including pharmaceutical companies, must recognize this as a form of covenant and an absolute minimum requirement."

David Heyburn, Head of Medicine Management, National Health Service.

For example, if you think about product launches today, many are primarily focused on the therapeutic product. But imagine the change in conversations with healthcare professionals if you were to talk about how your company can help their patients improve their health outcomes through a powerful combination of products and surrounding services? Or if you could have discussions on how you can help healthcare professionals identify at-risk patients before they are even diagnosed?

The need to change discussions to patient outcomes with healthcare providers in Europe is highlighted by the predicted shortfall of one million healthcare workers by 2020.⁷ This projection indicates there will be an even heavier burden on healthcare professionals with pharmaceutical companies having a unique opportunity to support them and the patients they treat through services in support of their products.



7. [European Commission report \(2012\)](#)

Conclusion

Patients still have significant unmet needs that services can fulfill across the patient journey—particularly in the pre-treatment interval. This shortfall, in combination with low patient awareness of services, but high usage and value across all disease states makes a strong case for pharmaceutical companies to change the way they are bringing patient services to market and engage at a much earlier phase in the patient journey. In doing so, they have an opportunity to achieve first-mover advantage in a specific therapeutic area and maintain that advantage by providing services at every interval of the patient journey.

With healthcare professionals as patients' most trusted advisor, they are the natural conduit to making patients aware of the services available to them. Consequently, healthcare professionals are the primary audience that pharmaceutical companies should be engaging with to make patients aware of services. After all, they are already interfacing with healthcare professionals in relationship to their products. The key will be to change those conversations from product focused to patient outcome focused, outlining how their products in combination with their services can help time-constrained healthcare professionals better serve their patients—even before they become one.

About the Research

Accenture retained Coleman Parkes Research to conduct an online survey of 10,000 respondents in the United States, United Kingdom, France, Germany and Brazil (2,000 per country) between December 2014 and January 2015.

Respondents were 18 years or above, with annual household income at or above \$25,000. For each country, we surveyed a minimum of 150 patients with conditions affecting the heart, lungs, brain, immune system, the bones or any organs, hormones/metabolism and any area of cancer. The rest of the sample was by natural fall-out.

The online questionnaires were completed at home, in private, and screeners and quotas were put in place to ensure quality of respondents and representation of the targeted population. The questions explored respondents' perspectives on a variety of services, including information or education, financial assistance, reward programs, physician referrals and nurse support.



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