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Accenture Life Sciences
Rethink Reshape Restructure... for better patient outcomes

Great Expectations: Why Pharma Companies Can't Ignore Patient Services

Accenture Research Note: Key findings from a survey of 2,000 patients in the United States

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An Accenture survey of 2,000 patients in the United States found that select patient services are highly valued and yet severely underserved, underutilized or nonexistent. However, those patients that receive services like them and greatly value them.

Do pharmaceutical companies know what patients want—rather, what patients *expect*—them to deliver?

Patients are exerting more influence than ever on their treatment decisions. And while medicines and therapies are essential in delivering an improved health outcome, patients also are clear about needing complementary services to help them better manage their health and individual outcomes.

An Accenture survey of 2,000 patients in the United States found that select patient services are highly valued and yet severely underserved, underutilized or nonexistent. On the positive side, those that receive them like them and greatly value them. Those that don't receive them want to—and expect pharmaceutical companies to provide them either directly or through their healthcare providers. Further, patients are perfectly happy receiving these services via digital channels or enabled by them, as they are spending multiple hours a day online already.

All of which raises the question: Can pharmaceutical companies afford not to provide such services, particularly in therapeutic areas where services could improve health outcomes?

It would appear that the answer is 'no', but success and return on investment in patient services require understanding what patients truly value in services, why they value them and how they want to receive them for different therapeutic areas and health needs. Ultimately, these types of services may be exactly what the doctor ordered for pharmaceutical companies—giving them new outcome-based offerings to engage with patients and the broader healthcare ecosystem including providers, Integrated Delivery Networks (IDN), retailers, payers, and others.

KEY RESEARCH FINDINGS

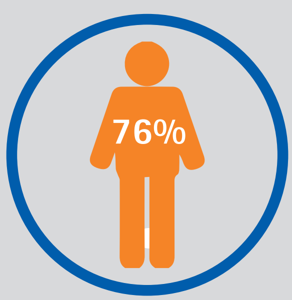
1. The vast majority of patients don't just want patient services—they expect them.

Patients are increasingly taking more control of their health—and being encouraged to do so from a wide range of sources including the government, payers and other healthcare providers. Not surprisingly, they are looking for assistance to do so. Nearly half (46 percent) of American adults take prescription drugs; the average is 4.1 prescriptions. A fourth of those ages 18 to 39 regularly take two prescription drugs, suggesting that a reliance on multiple drugs is no longer confined to older Americans according to a 2012 poll by Consumer Reports National Research Center.

Having established that commercial connection, it is understandable why an overwhelming percentage of patients believe that pharmaceutical firms should provide services that complement the products they sell (see Figure 1). Providing personalized and value-add services in support of the products they sell is common across almost every other consumer-facing industry from retail to telecomm, hi-tech and travel. Why should pharma be any different? Especially when addressing something as important as someone's health?

Our survey found:

- **76%** of patients think pharmaceutical companies have a responsibility to provide information and services that help patients manage their own health.
- Nearly as many respondents—**74%**—indicate that the most appropriate time to initiate outreach is when they start taking a medication, although half of the respondents are open to receiving assistance after they have begun a course of treatment or are considering switching (see Figure 2).



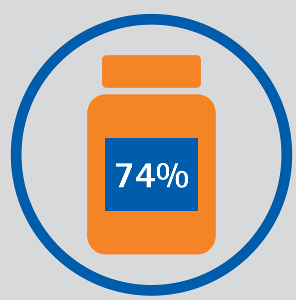


FIGURE 1. Patients believe it is important for pharmaceutical companies to have complementary services for their products

Do pharmaceutical companies have a responsibility to provide services that complement their products?

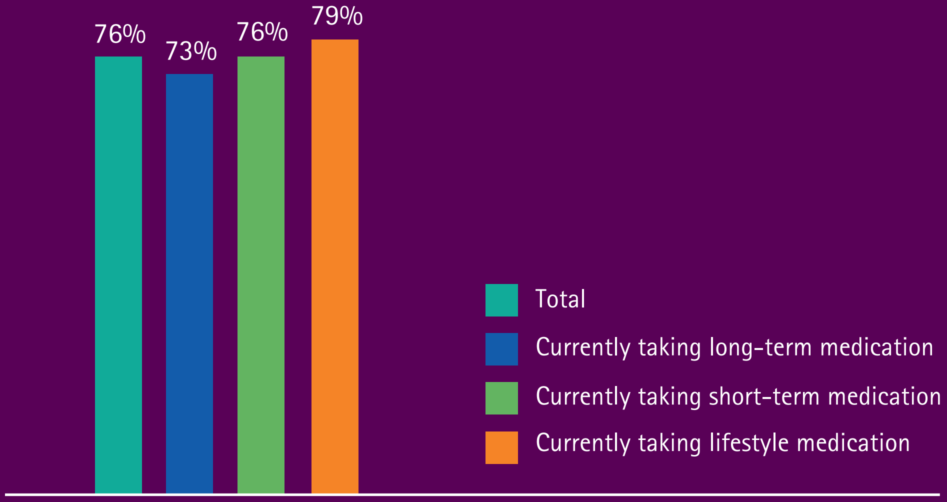


FIGURE 2. Patients are most receptive to pharmaceutical companies reaching out to them when they are about to start a medication

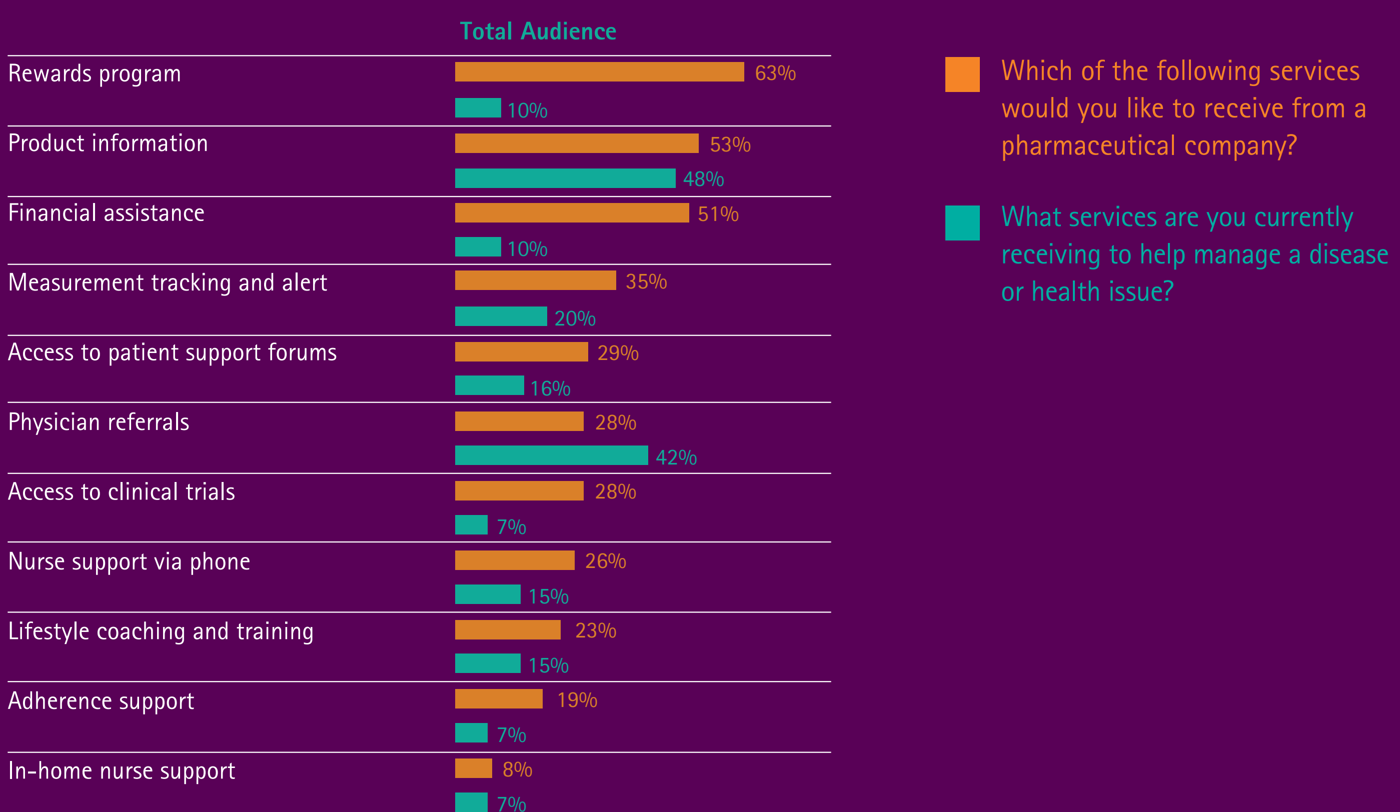
When would you be most receptive to pharmaceutical companies contacting you?

	Total Audience	Currently taking long-term medication	Currently taking short-term medication	Currently taking lifestyle medication
When you are about to start taking the medication (examples of assistance or support: where to find the product, help determining if the medicine is right for you, information on taking the product, financial)	74%	75%	69%	74%
When you are thinking about switching (examples of assistance or support: comparison with alternative medicines, financial assistance/ discounts)	50%	53%	47%	49%
When you are already on a medication (examples of assistance or support: information on side effects, adherence assistance, finding patients with the same health issue)	50%	48%	52%	49%
There are no circumstances under which I find it appropriate or desirable for a pharmaceutical company to provide me assistance or support	27%	24%	31%	26%

What are the services that patients are receiving today? And which ones do they really want? Surprisingly, there is a significant gap between the services that patients want and what they are receiving.

- Rewards programs have the largest gap between those wanting the service— 63 percent— and only 10 percent receiving it (see Figure 3). The four services or information patients most expect or want are:
  1. **Reward programs**—63 percent want, 10 percent receive
  2. **Product information**—53 percent want, 46 percent receive
  3. **Financial assistance**—51 percent want, 10 percent receive
  4. **Measuring and tracking**—35 percent want, 20 percent receive
- **Product Information** and **Physician Referrals** were the two highest services received, although neither reached 50 percent (see Figure 3).
- 20 percent or less of patients are receiving any one of the other services.
- Interest in financial assistance is particularly high among those taking long-term medication at 57 percent. This reflects the heavy cost burden many people with chronic conditions bear.

FIGURE 3. Patients demand for patient services is high, but supply remains mixed



2. Patients greatly value services when they get them.

Patients are generally very satisfied with patient services when they get them—and are willing to give more personal health information to obtain more relevant services. Of the patients who receive services, a sizable majority (70 to 80 percent) express satisfaction with all the services used, as shown in Figure 4.

- Satisfaction rates are high across the board—ranging from a high of 80 percent for **physician referrals** to 69 percent for **access to patient support forums** for the top five services used.
- Less used services, such as **access to clinical trials** and **financial assistance**, posted the lowest satisfaction ratings at 63 percent—which is still a relatively high satisfaction score.
- The most important services to patients overall are **product information** (73 percent), **financial assistance** (64 percent), **reward programs** (60 percent), and **physician referrals** (55 percent) (see Figure 5).

FIGURE 4. Patients who receive services greatly value them, and expressed a strong desire for more

Comparison of satisfaction

Services	Satisfaction	Desired	Received
Physician referrals	80%	28%	42%
Nurse support via phone	79%	26%	15%
In-home nurse support	77%	8%	7%
Measurement tracking and alert	76%	35%	20%
Rewards program	70%	63%	10%
Product information	70%	53%	48%
Adherence support	70%	19%	7%
Access to patient support forums	69%	29%	16%
Lifestyle and coaching and training	69%	23%	15%
Financial assistance	63%	51%	10%
Access to clinical trials	63%	28%	7%

FIGURE 5. Patients reveal their most important services

Please rank your top five most important services

	Total Audience	Currently taking long-term medication	Currently taking short-term medication	Currently taking lifestyle medication
Product information	73%	81%	70%	67%
Financial assistance	64%	68%	66%	58%
Rewards program	60%	65%	58%	57%
Physician referrals	55%	60%	53%	52%
Nurse support via phone	45%	46%	47%	44%
Access to patient support forums	40%	39%	41%	39%
Lifestyle coaching and training	39%	37%	39%	41%
Access to clinical trials	37%	34%	37%	40%
Measurement and tracking and alert	36%	34%	34%	40%
Adherence support	33%	25%	37%	40%
In-home nurse support	18%	12%	19%	23%

Patients place high importance on services providing a strong indication that services are viewed as a 'should offer' not a 'nice to offer' add-on—dependant on the type of medicine or treatment. Patients are also ready and willing to share information in order to receive improved or free services (see Figure 6).

Patients recognize that to be most relevant and useful, services need to reflect current and accurate health information, which must be provided in exchange for these valuable services.

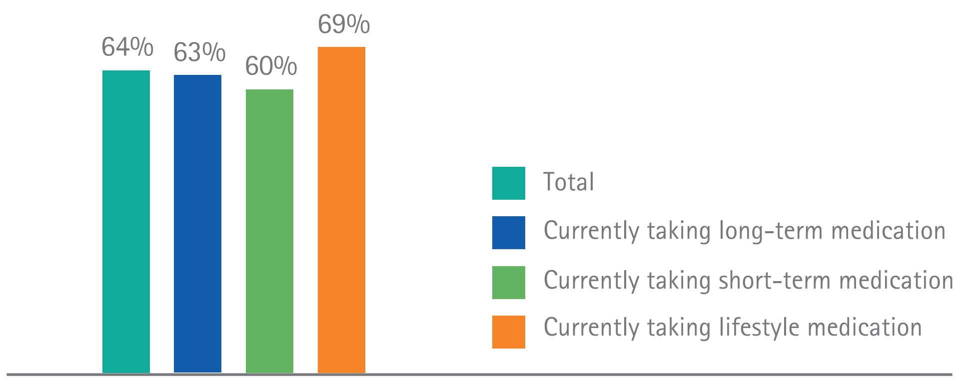
This desire for services, and their willingness to collaborate with healthcare firms to obtain them, represents a significant opportunity for pharmaceutical companies to explore service components as a way to expand access to care and treatments that patients need to remain healthy.

Each pharmaceutical company will have to evaluate the fit for their own portfolio, disease areas, patients types and value gaps. In the short term, there are exciting strides being made by pioneering pharmco's who are using patient services in everything from launching new products to using services as the basis for setting up new innovative collaborations with provider systems, payers and retailers to deliver improved health outcomes for patients.

More than **6 in 10 (64 percent)** patients are willing to provide information on their health in order to receive free information and/or services

FIGURE 6. Patients are willing to provide information on their health to get the services they want

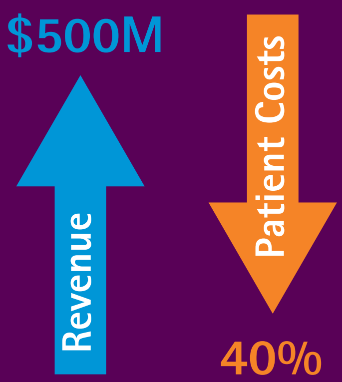
Are you willing to provide information on your health in order to receive free information or services in return?



Leading Examples of Pharmaceutical Companies Servicing the Patient for Better Outcomes

Delivering multi-channel patient education, outreach and support during product launch

A leading global pharmaceutical company is using patient services to launch an anti-obesity drug in the United States. Success requires tailoring communications to meet individual patient preferences. Accenture is helping meet that goal by providing patient services across multiple channels including **web, email, direct mail and inbound/outbound call centers**. The program is expected to **increase patient adherence by 30%** and deliver personalized customer experiences based on patient segmentation analysis and insights from patient interactions.



Finding the best information and service combinations using big data analytics

A major healthcare company is collecting, aggregating and analyzing real-world data from payers, providers and patients to determine the combination of information and services to deliver the best outcomes for diabetes patients. Accenture is working with this client and the various stakeholders with the goal of **increasing revenues by more than $500 million** annually, **reducing costs by an average of 40 percent** for diabetes patients and decreasing visits to the ER by more than 50 percent for high-risk patients.

Merck's VreeHealth provides post-discharge services for providers, payers and patients

Merck launched a unique, non-brand-specific suite of services from its subsidiary, VreeHealth. VreeHealth leverages technology to provide products and services that help patients transition to post-discharge environments (homes, assisted care facilities, etc.) by maintaining a connection among patients, providers and payers and providing a platform and tools to facilitate information and data exchange. The goal is to help patients and providers improve overall care quality and outcomes, while **reducing re-admissions and related costs**.

3. Patients are proactive, digitally-enabled and continuously seek and consume health-related services from a variety of channels and sources.

Today's 'always on' patients use digital and non-digital channels to access information and services related to their health and medications. The 'consumerization' of healthcare is reflected in both patients' frequent use of consumer digital technology to conduct health research and engage with providers and health communities, as well as their elevated expectations for how 'beyond the pill' services and solutions should be delivered. Our survey found that:

- 80 percent of patients are proactively seeking information about the medicines they are taking, and more than 70 percent seek out information on healthcare services related to their conditions (see Figure 7).
- More than two-thirds—68 percent—of patients/consumers spend several hours a day online. This includes 69 percent of those older than 65.

Patients' preferences for receiving information vary by source, channel, and format. Traditional channels have high preference, but digital is rapidly gaining ground. Pharmaceutical companies should consider using 'above the line' and 'below the line' mediums when communicating to new and existing customers, because patients prefer that companies reach them via digital channels (see Figure 8).

- Not surprisingly, patients place the highest trust in information provided by their physicians via print (presumably in person or at a facility) or by email.
- On the other hand, patients want pharmaceutical companies to reach them via digital and social means with 69 percent wanting to be reached by email versus 66 percent via print materials.
- 48 percent want pharmaceutical companies to reach them via a website with a strong 44 percent through mobile apps.
- 38 percent want pharmaceutical companies to reach them via social media—a significantly higher percentage than what they want from physicians, pharmacists, friends and family.

There is a clear need for pharmaceutical companies to understand patient communication preferences and customize channels and content to provide relevant customer experiences at scale.

FIGURE 7. Patients are proactively seeking information on medications and health services

Percentage of respondents describing themselves as proactive when reviewing information on medications, chronic conditions, healthcare services, illnesses and clinical trials

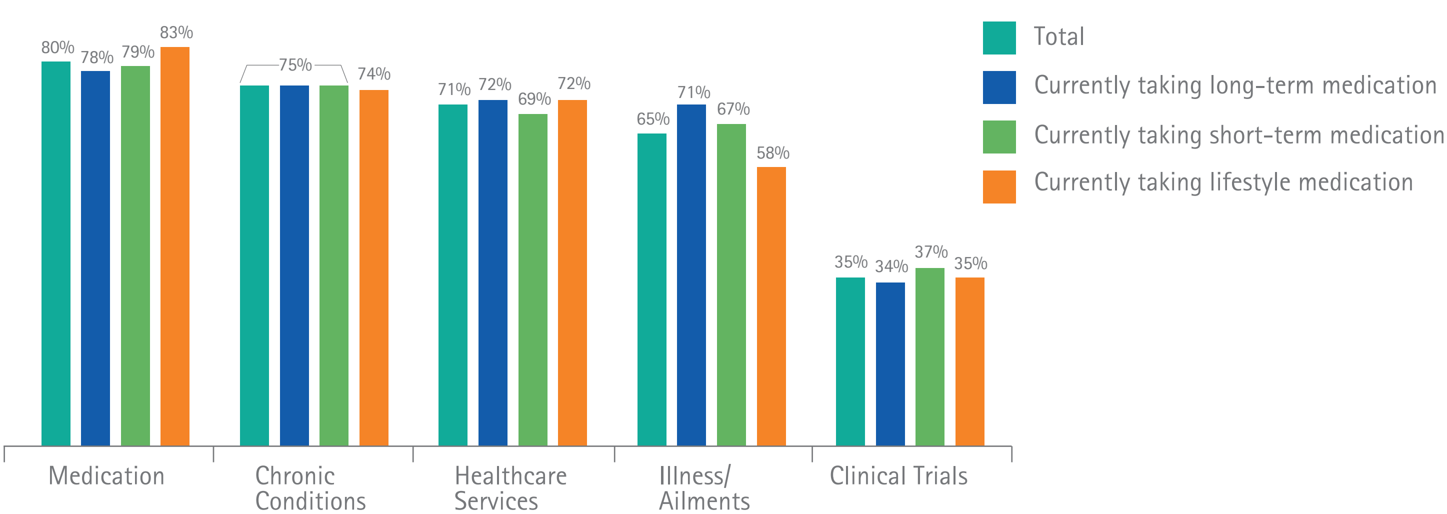
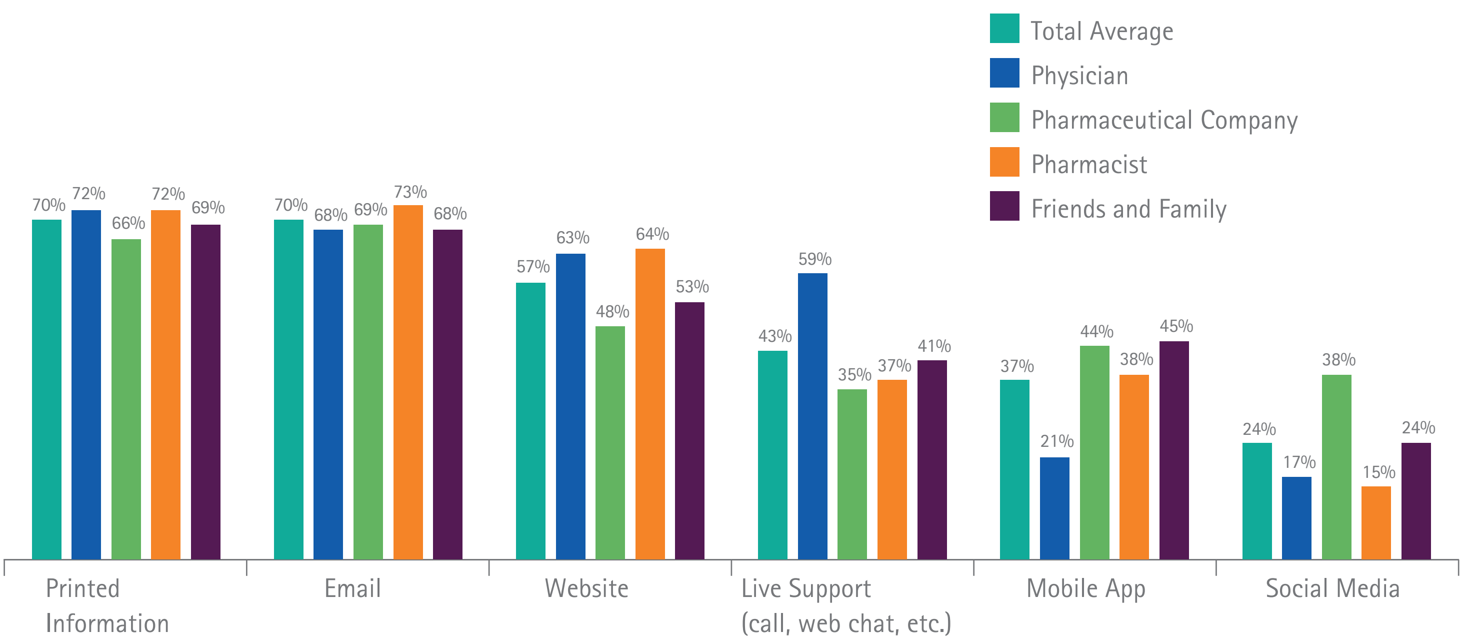


FIGURE 8. Patients prefer digital and social outreach from pharmaceutical companies

Please rank your preferred method of outreach when receiving information on medicines and healthcare



CONCLUSION

Patients want and expect more services from pharmaceutical companies to help them learn about their conditions and therapies, and better manage their health. The healthcare marketplace provides significant opportunities for pharmaceutical companies to do so. All pharmaceutical companies need to take a close look at their current portfolio and identify where patient services could benefit patients and the business, as well as support provider, retailer, payer and patient goals. However, some specialty drugs such as oncologics or lifestyle drugs such as obesity and smoking cessation, for example—may be even better suited for patient services. The services that are most useful will vary by therapeutic area, strategic, branding and financial objectives.

The ability to provide accessible, useful patient services will help pharmaceutical companies elevate their value across the healthcare ecosystem—improving health outcomes for patients, and partnering with other health-ecosystem constituents to achieve improved patient outcomes.

Survey Methodology

Accenture retained Coleman Parkes Research to conduct an online survey of 2000 respondents in the US between September and October, 2013. Respondents were 18 years or above, with annual household income of $25K or above, and currently taking a short-term medicine (e.g., antibiotics, or migraine medication), a long-term medicine (such as those for treatment of diabetes, or high blood pressure), or a lifestyle medicine (e.g., birth control pills, or erectile dysfunction therapies). 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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About Accenture Life Sciences

Accenture is a global management consulting, technology services and outsourcing company, with approximately 281,000 people serving clients in more than 120 countries. Combining unparalleled experience, comprehensive capabilities across all industries and business functions, and extensive research on the world's most successful companies, Accenture collaborates with clients to help them become high-performance businesses and governments. The company generated net revenues of US$28.6 billion for the fiscal year ended Aug. 31, 2013. Its home page is www.accenture.com.

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