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## Accenture Life Sciences

Rethink Reshape Restructure...for better patient outcomes

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

Key findings from a survey of 2,000 patients in the United States



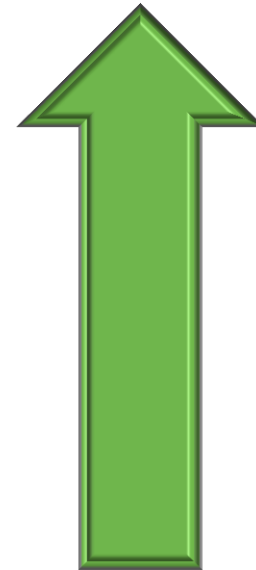
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# What do pharma CIO's think?

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**85%** of pharma CIO's are interested in hearing about Patient Services



**Trending up**

## About this research ...

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- **Who:** **2,000 respondents** in the United States, 18 years or above, with annual household income of \$25K+, 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).
- **What:** **perspectives on patient services**, including information or education, financial assistance, reward programs, physician referrals, and nurse support.
- **When:** September and October, **2013**

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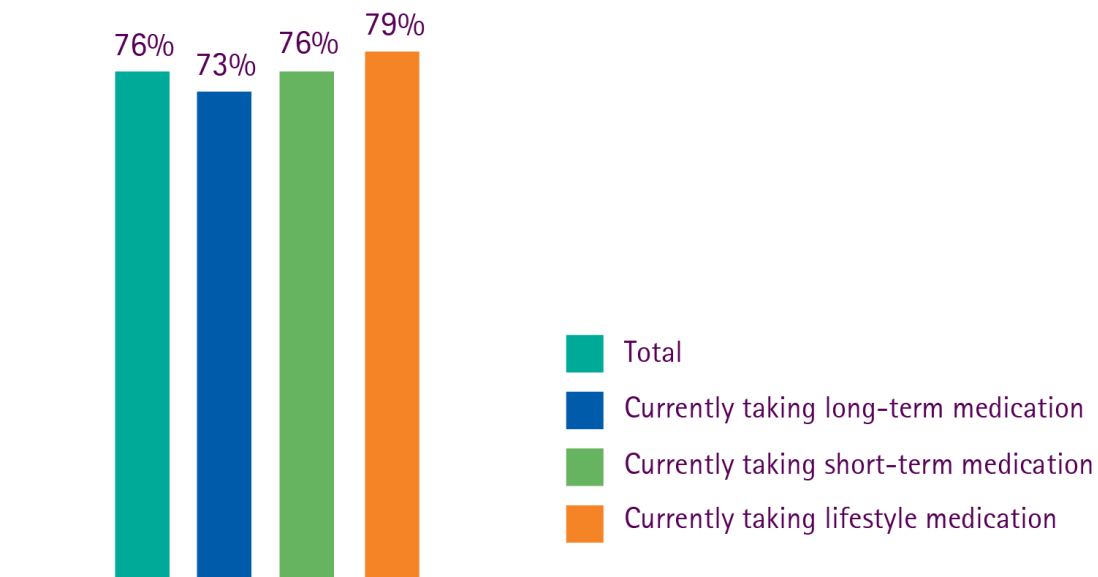
# Is there an Industry Imperative?

*There is a great deal of chatter about the industry shifting from products to services, but what do patients expect from pharma?*

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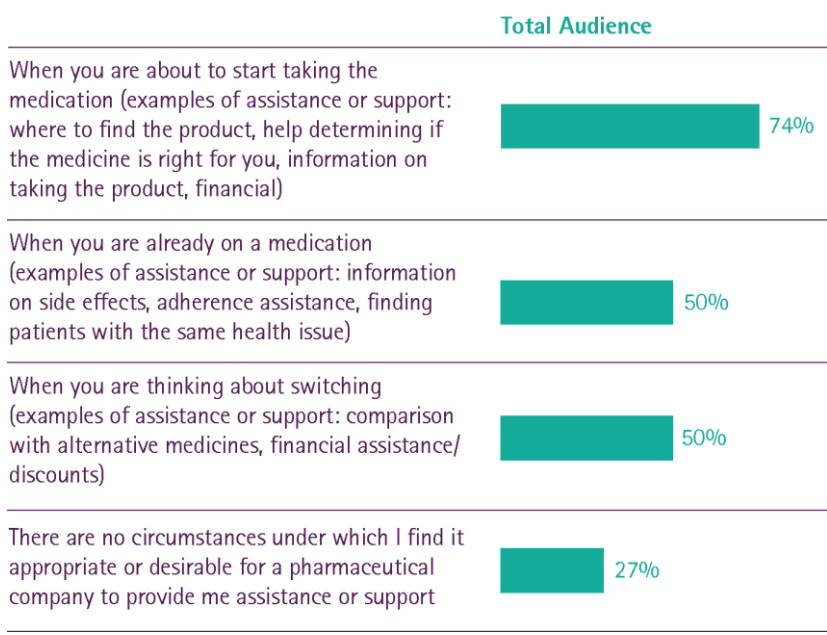
# The vast majority of patients don't just want services—they expect them

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

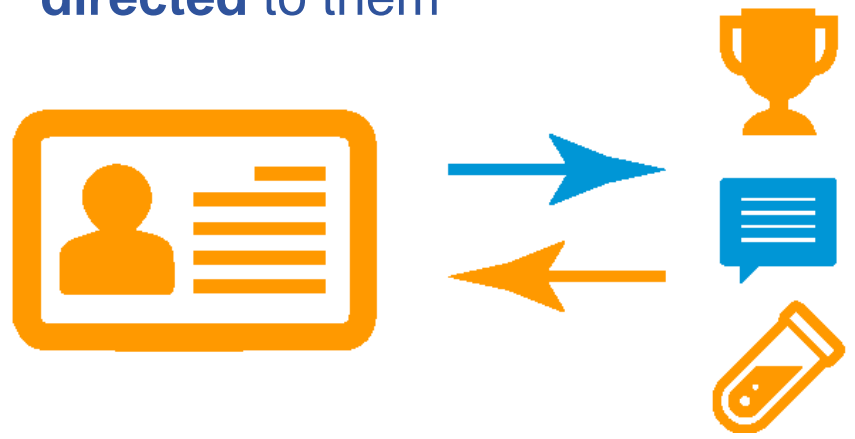


## 2 And patients are willing to interact with pharma ...

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



**64%** are willing to provide **personal** information on their health in exchange for free information and services **directed** to them



# 3 Patients greatly value services when they get them

## Comparison of Satisfaction

Services	Satisfaction
Product information	80%
Measurement tracking and alert	79%
Adherence support	77%
Physician referrals	76%
Rewards program	70%
Access to patient support forums	70%
In-home nurse support	70%
Lifestyle and coaching and training	69%
Nurse support via phone	69%
Access to clinical trials	63%
Financial assistance	63%



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However, there are some significant gaps between the services patients want and those they are receiving.



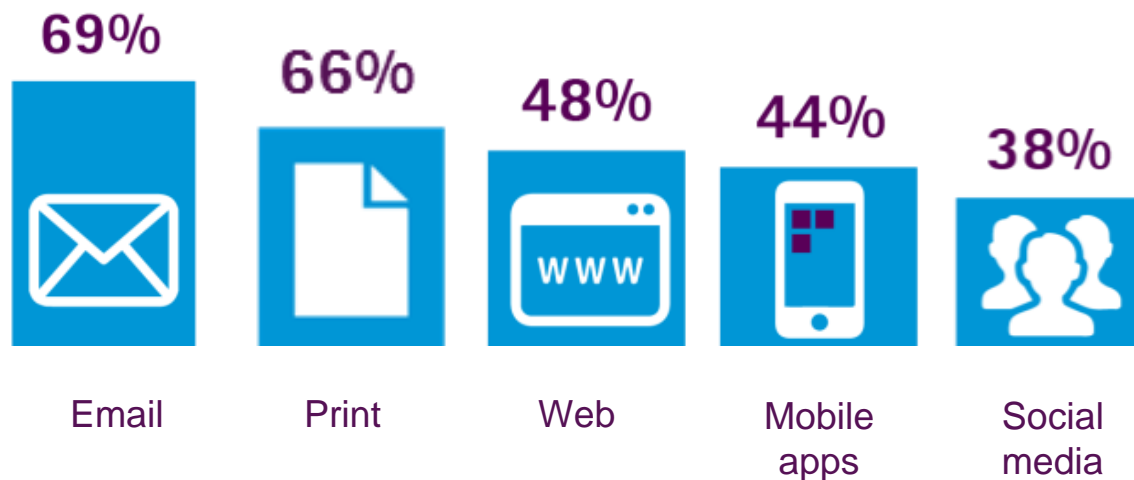


# Patients are proactive, digitally-enabled and continuously seek health-related services from a variety of channels and sources

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**68%** of patients are online several hours a day and many prefer pharmaco's reach them through digital channels.



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What are the implications?

*Will this really change how pharma operates, and if so, how?*



**Hypothesis #1: Industry leaders will drive their success through a combination of both innovative medicines and high value services**

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***Can patient services drive a tangible ROI or support improved health outcomes? What is the biggest challenge for pharma to realize these types of results?***

**Hypothesis #2: The expansion of patient services will create a need to unify the experience patients have over time and across services**

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***How prepared is pharma to coordinate patient relationships and multi-service engagement? What will need to evolve to make this attainable (e.g. capabilities, partners, legal/compliance changes)***





**Hypothesis #3: There will be an increased interest & need for engagement with niche vendors for differentiated service offerings in a rapidly evolving market of disruptive technologies**

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***What changes are required for pharma to become more flexible and dynamic in leveraging unique technologies for patient services?***

**Hypothesis #4: Patients intuitively desire reimbursement support, but this is only one element of a broader need to raise the game in managing brand value in terms of price-to-outcome**

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***Is there a role for patient services to support the growing industry challenge of demonstrating patient outcomes to obtain approval and reimbursement status?***



**Hypothesis #5: While there are data privacy and compliance challenges associated with patient services, leading companies will find ways to approach this to optimize their engagement with patients responsibly**



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***How must pharma adapt to be successful meeting patient expectations, given the constraints and risks?***

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# Accenture Patient Care Business Services

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