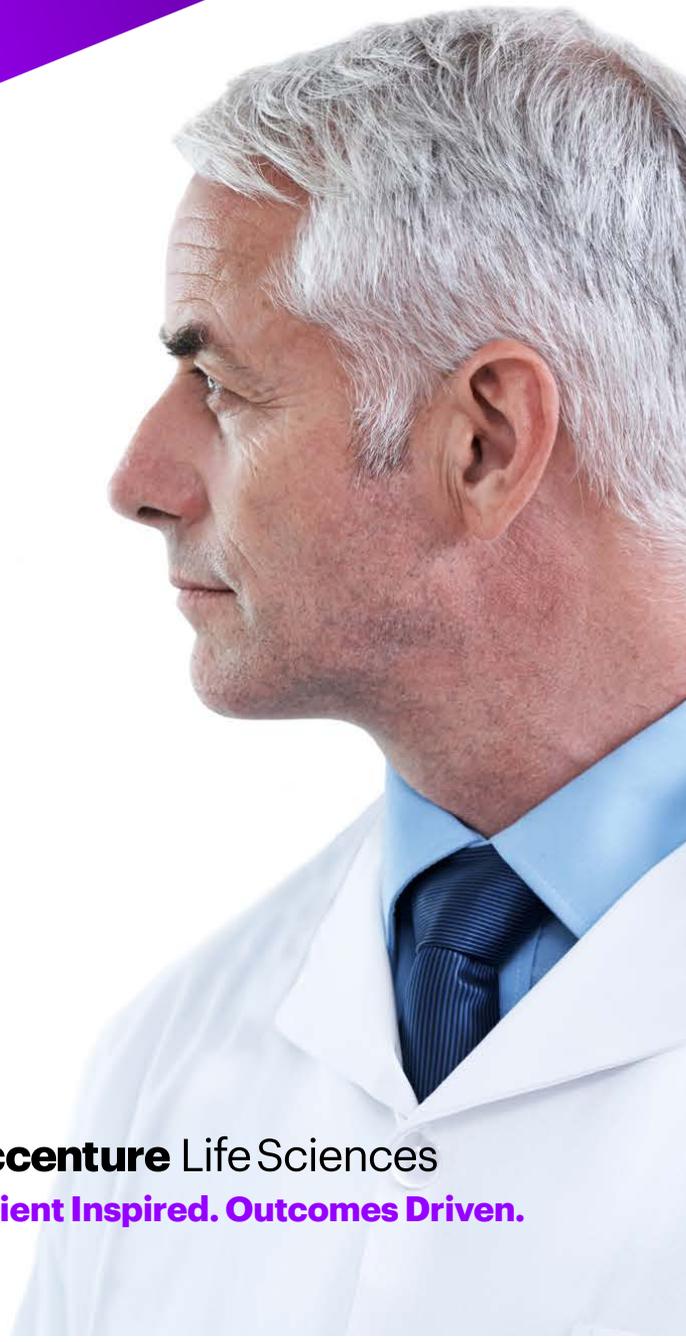




# LOST IN TRANSLATION: THE COMMUNICATION GAP IN PATIENT SERVICES



**Accenture** Life Sciences  
Patient Inspired. Outcomes Driven.

# PATIENT SERVICES

## PATIENTS WANT THEM, PHARMA IS INVESTING IN THEM, BUT PATIENTS DON'T KNOW ABOUT THEM ...AND NEITHER DO HEALTHCARE PROFESSIONALS

Over the past several years, Accenture has been studying the use, value, and awareness of patient services in top global healthcare markets to understand how the pharmaceutical industry can better meet patient needs and improve outcomes. We have consistently found a growing trend, with patients expressing that they want, value and expect patient services from pharmaceutical companies—across therapeutic areas, geographies and throughout their healthcare journey.

In response to this trend, pharmaceutical companies, confident in the potential of patient services, are ramping up their investments in offerings ranging from services that help patients better understand their disease and how to manage it to services that help patients engage with others similarly affected, adhere to their treatment plans and find alternative ways to pay for their therapies.<sup>1</sup>

In our 2015 survey, patients told us that they want to hear about patient services primarily from their healthcare providers (HCPs).<sup>2</sup> Meanwhile, our 2016 survey revealed that most pharmaceutical companies (81%) rely on healthcare professionals to communicate information about their services. On paper, it appears to be a perfect match.

And yet, a troubling “disconnect” persists between pharmaceutical companies and patients. Despite clear support from both parties, pharmaceutical companies face a significant challenge in making patients aware of the services they offer, with just one in five patients aware of services.<sup>2</sup>

This gap made us wonder: What is happening between the point where pharma companies tell HCPs about their services that support patients and HCPs talking with patients about their care program? How do HCPs really find out about patient services? Do they see them as essential? How often do they recommend them to patients, when and why? And, on the flip side, what factors might keep them from sharing information about patient services?

To better understand the full landscape of patient services, our 2017 research surveyed 362 healthcare professionals in the US, the UK, France and Germany who were either a specialist in one of five different therapeutic areas or a general practitioner to identify the best ways for pharma companies to make HCPs—and ultimately patients—aware of and use patient services in ways that will improve outcomes and their return on investment. This report details the survey's key findings and outlines the implications of those findings for pharmaceutical companies (see “About the Survey” for more details).

**The goal of our research is to help pharmaceutical company executives make better strategic decisions about how to connect patients and healthcare providers with services that can improve the patient experience, overall care and positively impact health and economic outcomes.**

## WHAT DO HEALTHCARE PROFESSIONALS THINK ABOUT PATIENT SERVICES?

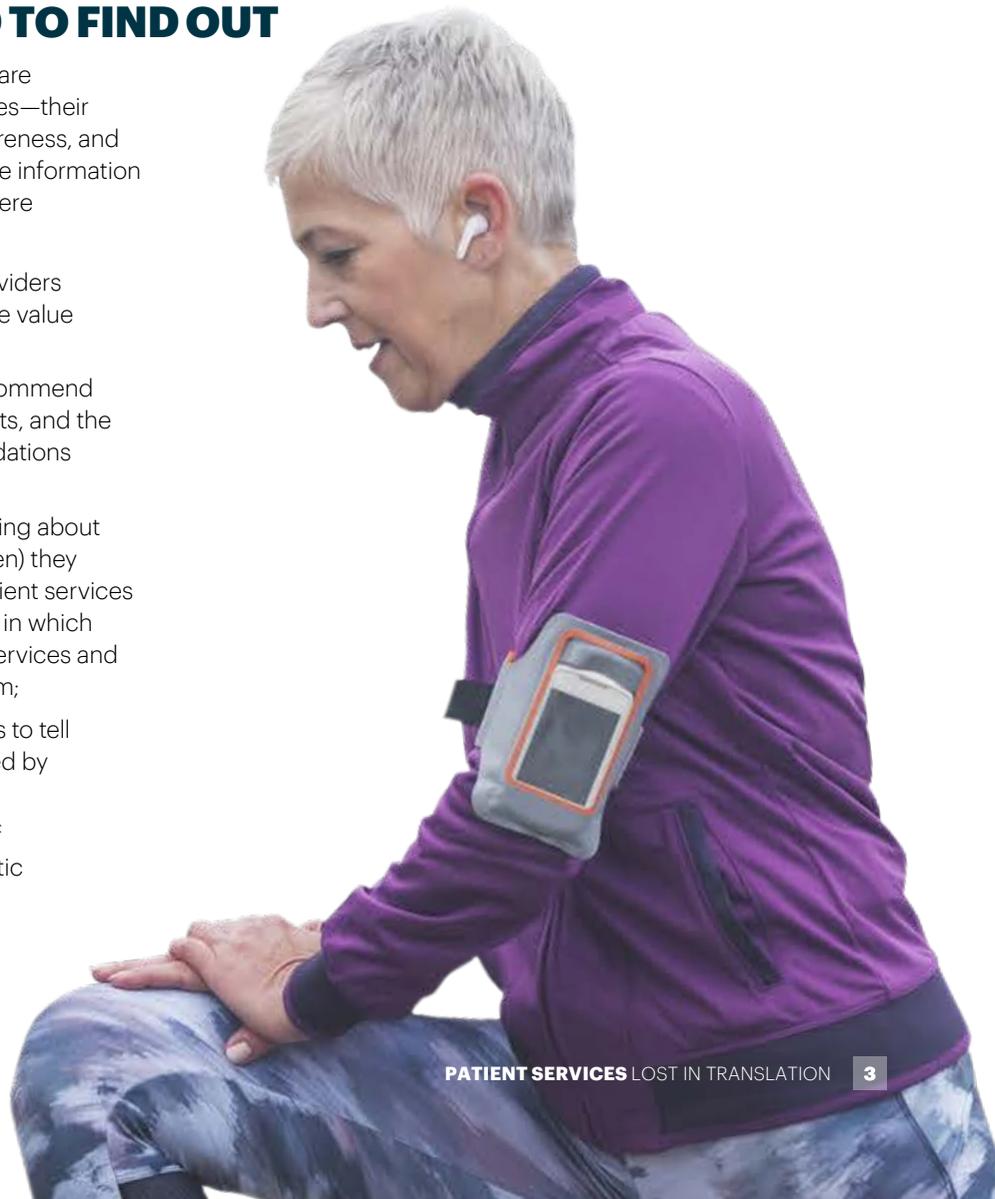
HCPs who regularly hear about patient services are more likely to recommend them and see fewer barriers to using them. They also see improving patient outcomes as the greatest benefit of using services.

**BUT HCPs aren't hearing about patient services nearly enough—and when they do, it is primarily as an add-on to product sales versus as an integrated solution that can help improve patient care and outcomes.**

### WHAT WE WANTED TO FIND OUT

This research report presents healthcare professionals' views on patient services—their perception of their value, level of awareness, and the extent to which they communicate information about services to their patients. We were particularly interested in identifying:

- The extent to which healthcare providers believe that patient services provide value to patients and improve outcomes;
- The frequency with which they recommend patient services to their own patients, and the context in which those recommendations are made;
- How healthcare providers are learning about patient services, how (and how often) they communicate the availability of patient services to their patients, and the manner(s) in which they prefer to learn about patient services and disseminate information about them;
- Barriers to their ability or willingness to tell patients about the services provided by pharmaceutical companies; and,
- If and how awareness and usage of patient services varies by therapeutic area and geography.



## KEY FINDING #1

# MOST HEALTHCARE PROFESSIONALS ARE NOT VERY AWARE OF PATIENT SERVICES

There is clear evidence that HCPs do not have a comprehensive understanding of the scope and depth of patient services being offered by pharmaceutical companies. Just 40% of our respondents reported being very aware of patient services; the majority (60%) said they are only somewhat aware, or not aware at all. HCPs in the Oncology field had the highest awareness level (52%), followed by Immunology (44%). Brain specialists had the lowest level, with just 31% being very aware of services available (see Figure 1).

Our survey revealed that pharma sales reps are the number one way HCPs hear about patient services today (see Figure 2). This confirms what pharma companies told us in our 2016 survey – that the majority (64%) primarily use in-person sales meetings with HCPs to inform them about their patient services. The problem is that HCPs aren't hearing about patient services from sales reps most of the time. Nearly half of the HCPs we interviewed said they hear about patient services less than 25% of the time in their meetings with sales reps. Interestingly, in France, 67% of HCPs said they hear about patient services during sales meetings less than 25% of the time, and 17% stated that they never hear about patient services during these interactions.

Communication with HCPs on patient services via other channels—such as conferences, email, websites, portals, etc.—is happening even less. More than half of HCPs reported that they hear about patient services less than 25% of the time through other channels (72% for HCPs in France).

## HOW OFTEN ARE HCPs HEARING ABOUT PATIENT SERVICES?

### FROM SALES REPS:

## ALMOST HALF

are hearing about patient services  
less than 25% of the time

### THROUGH OTHER CHANNELS:

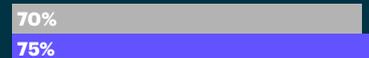
## MORE THAN HALF

are hearing about patient services  
less than 25% of the time

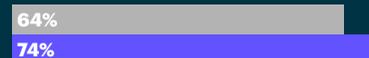
## HOW DO HCPs WANT TO BECOME AWARE OF PATIENT SERVICES?

Sales reps still top the list, with digital channels on the rise.

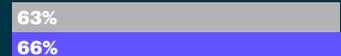
### PHARMACEUTICAL SALES REPS



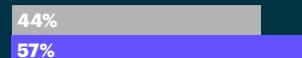
### CONFERENCES



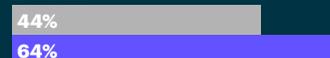
### COLLEAGUES/PEERS



### PHARMACEUTICAL WEBSITE/PORTAL

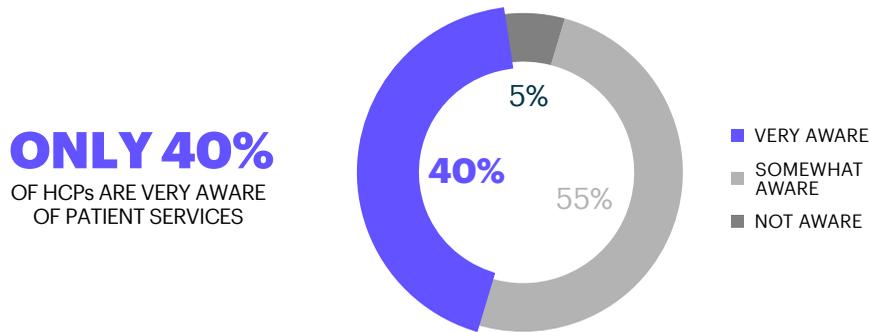


### E-MAIL



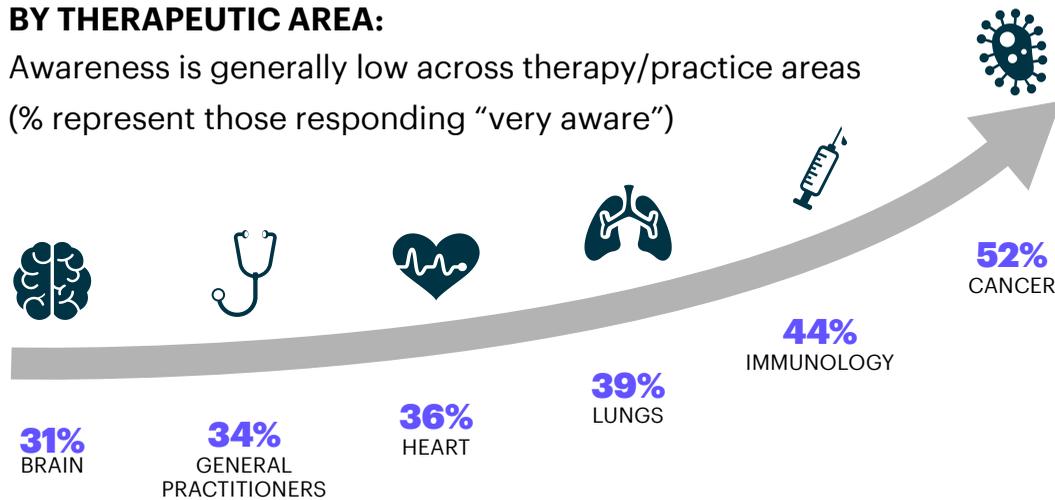
■ CURRENT CHANNELS THROUGH WHICH HCPs HEAR ABOUT PATIENT SERVICES  
■ FUTURE CHANNELS HCPs WOULD LIKE TO HEAR ABOUT PATIENT SERVICES

**FIGURE 1:  
HEALTHCARE PROFESSIONALS AWARENESS OF  
PATIENT SERVICES PROGRAMS**



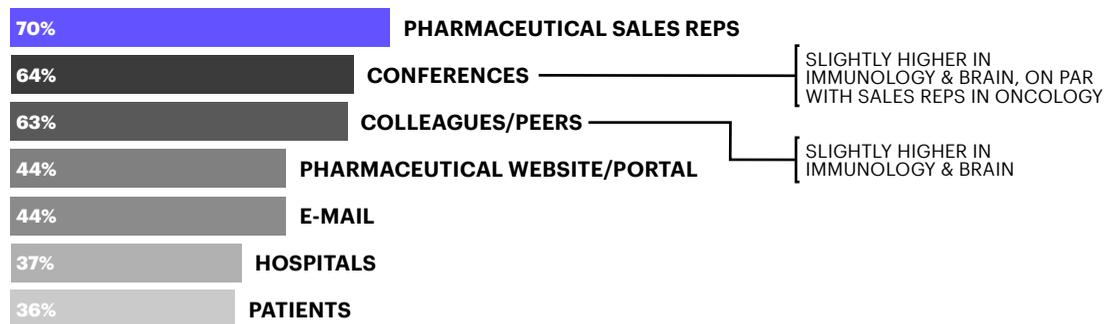
**BY THERAPEUTIC AREA:**

Awareness is generally low across therapy/practice areas  
(% represent those responding “very aware”)



**FIGURE 2:  
TOP SEVEN WAYS HCPs HEAR/LEARN ABOUT PATIENT SERVICES  
OFFERED BY PHARMA COMPANIES**

(Ranked in order of most to least used channel)



## KEY FINDING #2

# HCPs DON'T TALK ABOUT SERVICES FREQUENTLY WITH THEIR PATIENTS

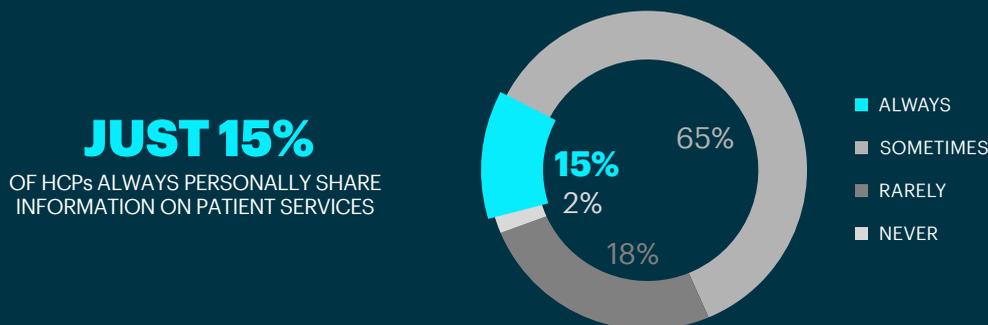
Last year's survey of 200+ patient services executives revealed that most pharmaceutical companies (81%) rely on HCPs as the primary way of communicating with patients about their services.<sup>1</sup> Meanwhile, most patients (63%) want HCPs to be their primary point of contact for those services.<sup>2</sup>

And yet, this year's survey revealed that just 15% of HCPs reported that they always personally share information on pharma services with their patients. The rest—and vast majority (85%)—said that they sometimes, rarely, or never personally share information on services with patients (see Figure 3). 42% of HCPs reported that their primary reason for not discussing services is that they lack a good understanding of what's available (see Figure 4). This was an even more prominent reason for HCPs specializing in Immunology (58%) and Brain (67%).

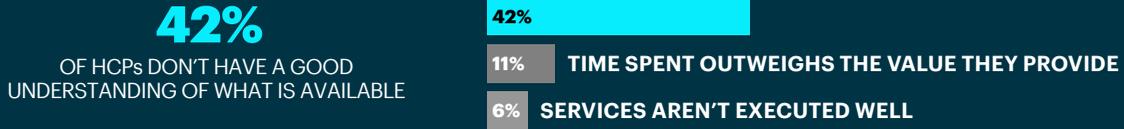
HCPs who share information about services with patients do so most often when those patients are starting out with a new therapy/drug/device, rather than at other points in their treatment (see Figure 5). This finding was consistent across all geographies and therapeutic areas and suggests a "one-and-done" approach to talking with patients about services versus an ongoing conversation throughout their treatment period.

**While just 15% of HCPs always share information on patient services, HCPs indicated that they are very willing to talk about them. Only 2% of respondents said that they never share information about services (see Figure 3).**

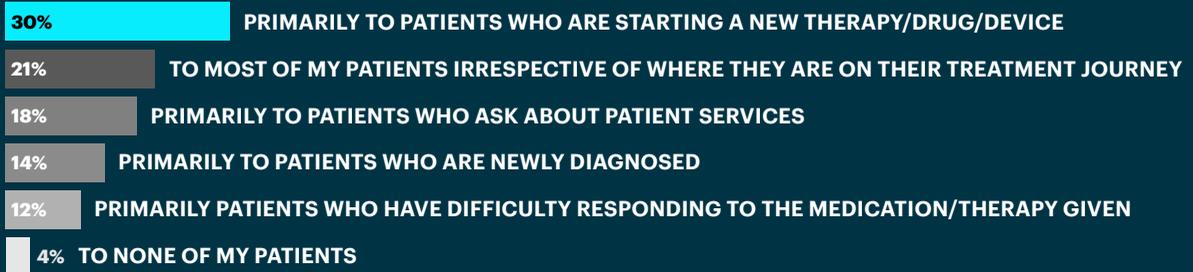
FIGURE 3:  
FREQUENCY OF HCPs PERSONALLY SHARING SERVICES WITH PATIENTS



**FIGURE 4:  
BARRIERS HCPs FACE IN RECOMMENDING PATIENT SERVICES**



**FIGURE 5:  
TREATMENT STAGE THAT HCPs RECOMMEND SERVICES TO THEIR PATIENT**



## KEY FINDING #3

# HCPs SEE BETTER PATIENT OUTCOMES AS THE NUMBER ONE BENEFIT OF USING SERVICES

### ...but most pharma companies aren't presenting them that way.

The opportunity to improve outcomes is the biggest benefit that HCPs see of using patient services. A significant number of respondents (21%) also cited patient services as an important contributor to patient care and support outside of the provider's office, and a factor supporting patients' ability to manage their conditions (see Figure 6). HCPs and pharma companies are aligned on this point as our 2016 survey of patient services executives revealed that delivering better patient outcomes was the primary goal in offering services.

However, just three out of ten pharma sales representatives present the services in terms of their ability to improve patient outcomes when they meet with HCPs. Most sales reps don't

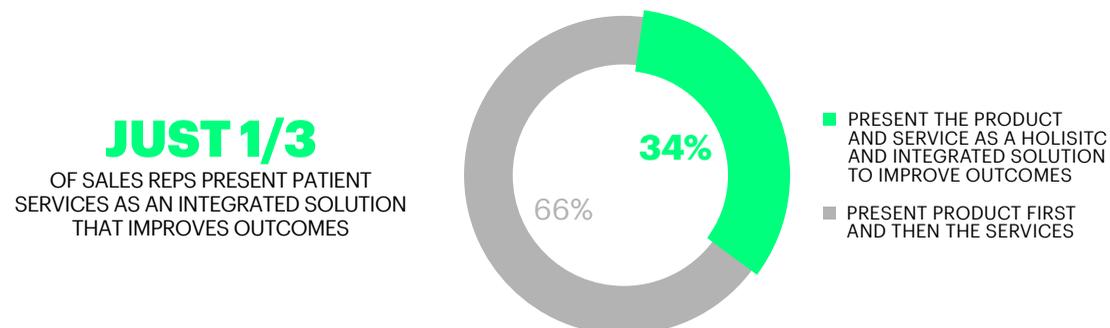
present patient services as an integral part of their company's offerings or part of a holistic solution to address unmet patient needs. Instead, they present the product first and tend to treat services as an afterthought or as an add-on (see Figure 7).

Meanwhile, HCPs indicate that they would be far more likely to recommend pharma companies' services to their patients if sales representatives made a more compelling case for their use. What would constitute a compelling case? A majority of HCPs (63%) say that solid, published evidence of improved outcomes would increase their trust/belief in the value of patient services (see Figure 8). And almost half (42%) said that evidence of services helping patients adhere to their treatment plans would increase their trust/belief.

FIGURE 6:  
TOP THREE BENEFITS OF PATIENT SERVICES FOR HCPs



FIGURE 7:  
HOW SALES REPS PRESENT PATIENT SERVICES TO HCPs



**FIGURE 8:  
EVIDENCE THAT WOULD INCREASE HCP TRUST/CONFIDENCE  
IN RECOMMENDING SERVICES TO THEIR PATIENTS**



## WHAT SETS HCP “SUPER RECOMMENDERS” OF PATIENT SERVICES APART?

HCPs who always share information about services with their patients have a distinct profile. These “Super Recommenders” have a high awareness of patient services and hear about them in meetings with pharma sales reps more than half the time.

Most Super Recommenders see no barriers to recommending patient services, and they recommend services to their patients regardless of their treatment stage. They also see delivering a better patient outcome as the primary benefit of using patient services. They use digital devices (such as laptops, tablets, smart phones, etc.) more

often during in-person meetings with their patients, and are more likely to communicate with patients about services outside of in-person meetings.

On the flip side, there are the “Infrequent Recommenders”—those who rarely or never share information about pharma companies’ services with their patients. Infrequent Recommenders have a low awareness of patient services, hear about patient services less than 25% in meetings with sales reps and mostly suggest patient services to patients who ask about them.

	<b>SUPER RECOMMENDERS</b> (always recommend)	<b>INFREQUENT RECOMMENDERS</b> (rarely or never recommend)
<b>AWARENESS OF PATIENT SERVICES</b>	<b>81%</b> ARE VERY AWARE	<b>21%</b> ARE VERY AWARE
<b>FREQUENCY HEARING ABOUT PATIENT SERVICES FROM SALES REPS</b>	MOST HEAR ABOUT THEM <b>MORE THAN 50%</b> OF THE TIME	MOST HEAR ABOUT THEM <b>LESS THAN 25%</b> OF THE TIME
<b>PRIMARY BENEFIT OF PATIENT SERVICES</b>	BETTER PATIENT OUTCOMES	PROVIDE VALUABLE INFORMATION TO PATIENTS
<b>BARRIERS TO PATIENT SERVICES</b>	MOST SEE NO BARRIERS	MOST CITE POOR UNDERSTANDING OF WHAT IS AVAILABLE
<b>WHEN THEY RECOMMEND PATIENT SERVICES</b>	TO MOST PATIENTS IRRESPECTIVE OF TREATMENT STAGE	MOSTLY TO PATIENTS WHO ASK
<b>FREQUENCY OF DIGITAL TECHNOLOGY USE WITH PATIENTS</b>	<b>HIGH USAGE</b> <b>74%</b> LAPTOP <b>51%</b> TABLET <b>45%</b> SMARTPHONE	<b>LOWER USAGE</b> <b>47%</b> SMARTPHONE <b>43%</b> LAPTOP <b>24%</b> TABLET

# SO WHAT SHOULD PHARMACEUTICAL COMPANIES DO DIFFERENTLY IN PATIENT SERVICES?

## FILL THE COMMUNICATION GAPS

Our research suggests pharma companies can turn many more HCPs into champions of patient services and in doing so, enable patients to become beneficiaries of those services. Patient services have the potential to become an essential and valued element in helping deliver better patient experiences and outcomes, but only if HCPs:

- Possess a comprehensive understanding of what's available;
- Understand how services can help deliver a better patient outcome;
- Feel confident when talking about services; and,
- Can easily inform and connect patients with the services best suited to their needs.

### AstraZeneca: incorporating services into clinical trials

In 2016, the company began using a mobile app in three clinical trials studying a therapy for women with certain recurring forms of ovarian cancer to gather information about two common side effects of the treatment. The goal: to help the patients report side effects more easily (and hopefully more quickly), and to help the doctors conducting the trial track side effects and respond more readily to patients suffering from them.

The app was developed by Paris-based Voluntis in close clinical collaboration with AstraZeneca and the US National Cancer Institute (NCI). It uses a Bluetooth-enabled blood pressure cuff to gather and send data to the patient's smartphone and also to the patient's doctors, including those conducting the trial, via a web portal.<sup>3</sup>



To that end, pharmaceutical companies can take action on the following fronts:



## **FILL THE R&D AND COMMERCIAL GAP**

### **Rigorously generate evidence on the effect of patient services on outcomes—starting with clinical trials.**

Presenting evidence that patient services have a notable effect on patient outcomes is essential in making a compelling case to HCPs. This calls for embedding services into the product-development process—starting with clinical trials—to generate the required data to prove impact on patient outcomes. Capturing such evidence at the very earliest stages of clinical trials will also help prove the value of services internally to sales reps, medical affairs, and budget holders, who will then advocate for or allocate resources so that service programs can be developed more effectively and marketed more purposefully. Taking these steps will help make patient services part of the company's DNA.



## **FILL THE PRODUCT AND SERVICE GAP**

### **Refocus commercial functions from developing and marketing brands to designing and marketing holistic patient solutions.**

For many organizations, taking this step will require a huge mindset change. Some organizations have tasked their brand teams with marketing patient services; doing so has typically led to patient services being an afterthought to the product. Other pharma companies have built separate patient-services organizations working separately/in parallel to brand or marketing teams; this approach also relegates services to an add-on position. Leading organizations will embed patient-services talent into their existing brand teams to enable their organizations to build and market holistic solutions—or even create "outcome" teams instead of brand teams.



## **FILL THE ENGAGEMENT GAP**

### **Focus conversations with HCPs (and the market) on outcomes—across all channels and with greater frequency.**

The entire healthcare industry is shifting to a value-based approach, but pharma companies are still talking primarily about their products. Sales reps, for example, are still driven by incentives based on script volume—an approach that is not aligned with the HCP's, patient's or payer's goal of improving patient health and outcomes. Pharmaceutical companies need to embrace an outcomes-first mindset, which means they are bringing an outcome to market, rather than a product. They need to ensure that every communication through every channel leads with outcome—positioning it as "what" they are selling and "why" their offerings should matter to their target audience—with the combined product and service(s) solution as the "how." And this approach should apply whether they are communicating to the market through the marketing organization, through sales reps, or through Medical Affairs (as is often the case in Europe).

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## ABOUT THE SURVEY

We surveyed 362 healthcare professionals across the United States and Europe (specialty physicians, primary care physicians, nursing specialists (e.g. a diabetic specialist nurse) and nurses working in a practice setting, hospital setting, or, in the USA, in integrated delivery networks or accountable care organizations, to understand their awareness, use and perception of the value of patient services. On average, these respondents each treat 2,240 patients per year. The fieldwork was conducted in March and April of 2017, and involved telephone interviews and online interviews, depending on the respondents' preferences. This is the fourth survey we have conducted on patient services to understand market and growth dynamics and the impact of patient services on patient and economic outcomes. Previous research includes two patient surveys and a pharmaceutical patient services executive survey.

Survey respondents were either general practitioners or specialists in one of five main therapeutic areas: cancer/oncology; immune system/immunology; brain/neurology; cardiology and lungs/respiratory.

Respondents were from the United States, the United Kingdom, Germany and France.

- 1 [The Patient is IN: Pharma's Growing Opportunity in Patient Services, Accenture 2016](#)
- 2 [Patient Services: Pharma's Best Kept Secret, Accenture 2015](#)
- 3 [AstraZeneca and Voluntis to test companion mobile app in ovarian cancer studies with the US National Cancer Institute](#)  
See also: [AstraZeneca to use mobile app in cancer trials](#)

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