

Accenture Life Sciences
Patient Inspired. Outcomes Driven.

LOST IN TRANSLATION: THE COMMUNICATION GAP IN PATIENT SERVICES


 **US Results**

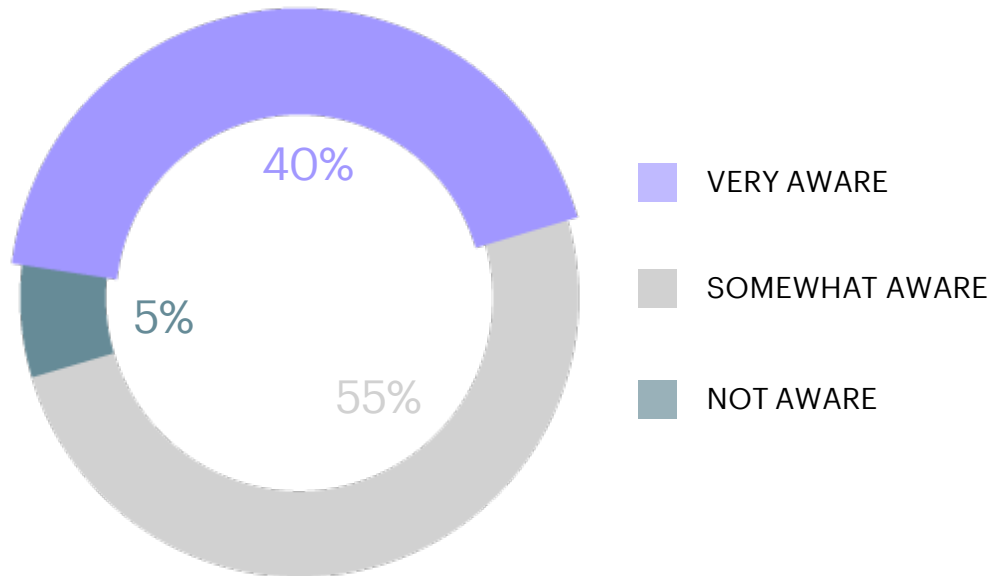
Survey of 182 US-based healthcare professionals on what their awareness, use and value of patient services is across five therapeutic areas and general practitioners.



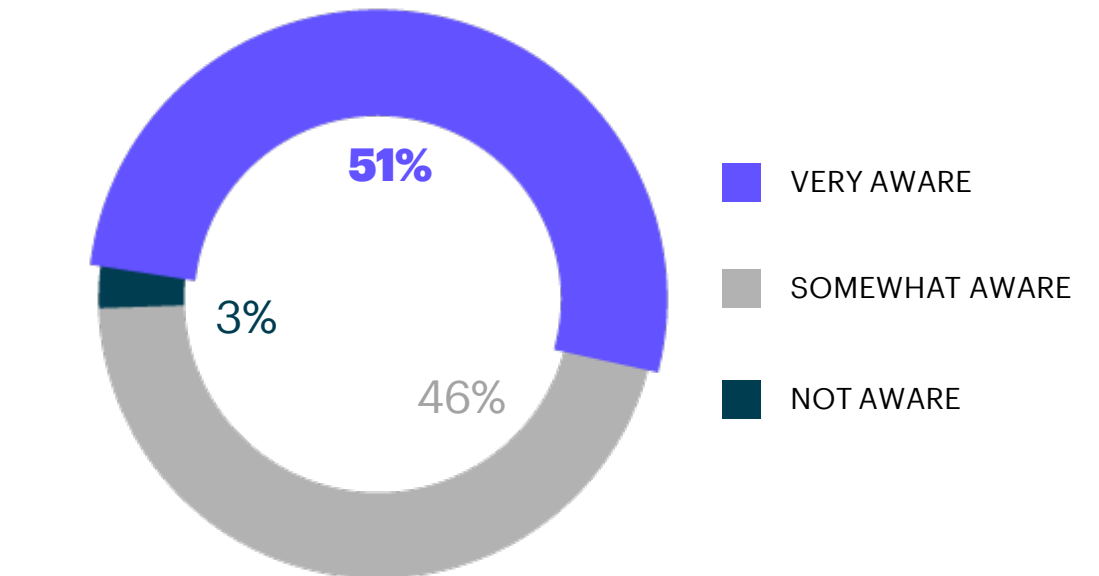
KEY FINDING #1

MOST HCPs ARE NOT VERY AWARE OF PATIENT SERVICES

 ACROSS ALL COUNTRIES SURVEYED, **JUST 40%** OF HCPs ARE VERY AWARE OF PATIENT SERVICES



THIS RISES TO **51% IN THE US**



Q.1. How aware do you feel you are of patient services programs within your therapeutic area/area of practice?
Single-coded question

Base: Total Respondents **(362)**
US Respondents **(182)**

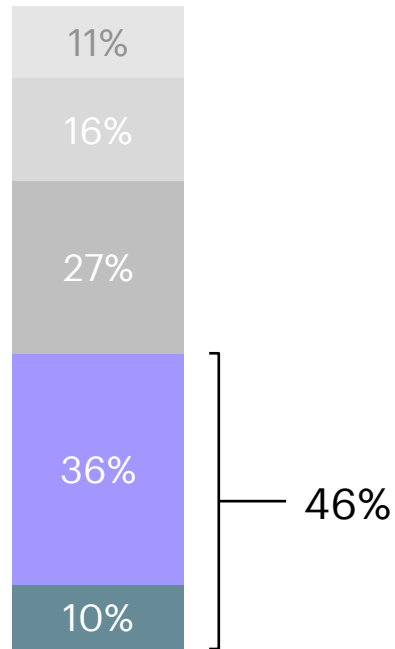
KEY FINDING #1

MOST HCPs ARE NOT VERY AWARE OF PATIENT SERVICES

Sales reps are the primary way HCPs hear about patient services, but most aren't talking about them. Almost half (46%) of HCPs hear about patient services from sales reps less than 25% of the time.

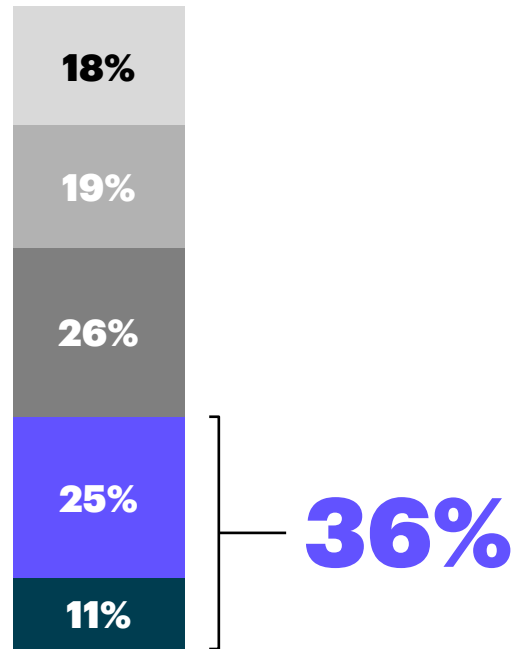
ALL COUNTRIES

- 76% - 100% OF THE TIME
- 51% - 75% OF THE TIME
- 26% - 50% OF THE TIME
- <25% OF THE TIME
- NEVER



US

- 76% - 100% OF THE TIME
- 51% - 75% OF THE TIME
- 26% - 50% OF THE TIME
- <25% OF THE TIME
- NEVER



In the US, HCPs hear about patient services more frequently, but

more than 1/3

still only hear about them from sales reps less than 25% of the time.

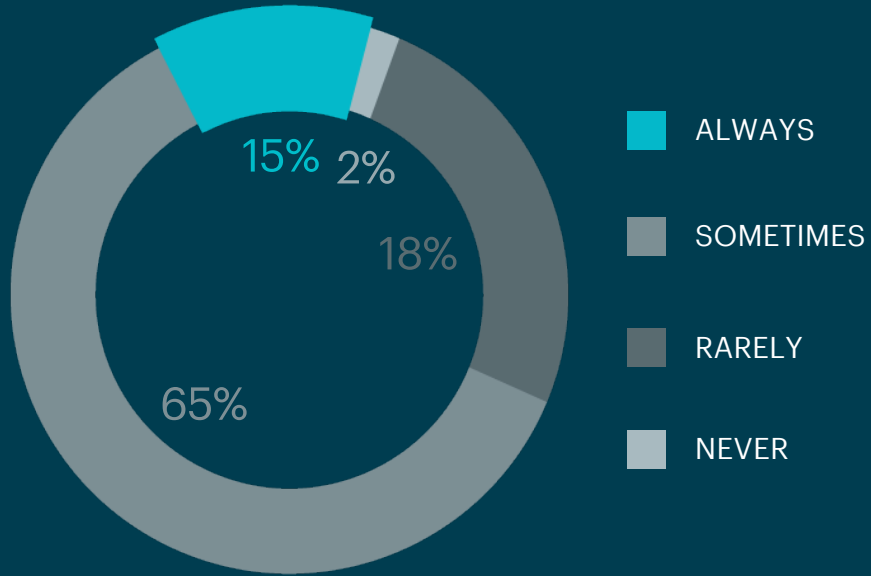
Q.8. How often do you hear about patient services during in-person visits from Sales Reps? Single-coded question

Base: Total Respondents (362)
US Respondents (182)

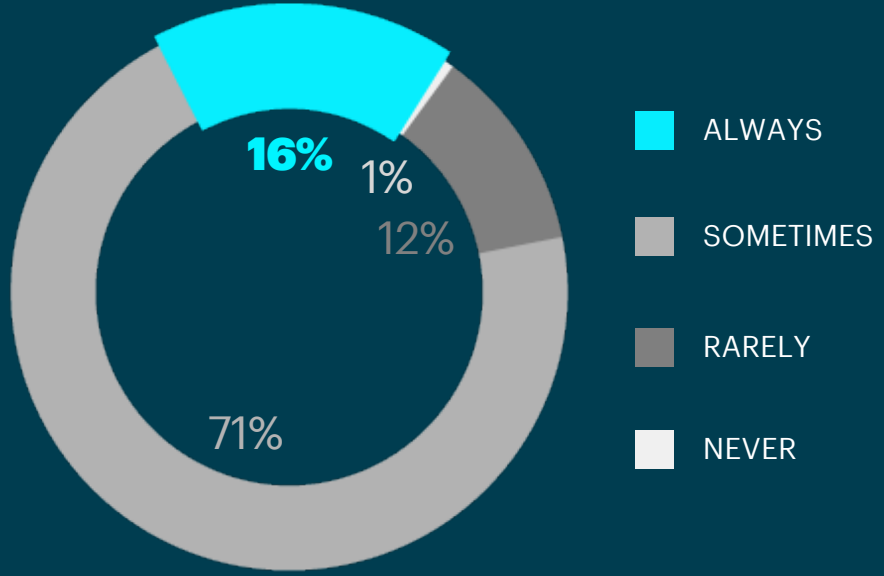
KEY FINDING #2 HCPs DON'T FREQUENTLY TALK ABOUT PATIENT SERVICES WITH THEIR PATIENTS



OVERALL, **JUST 15%** OF HCPs ALWAYS PERSONALLY SHARE INFORMATION ON PATIENT SERVICES



THIS IS SIMILAR IN THE US (16%), BUT A SLIGHTLY HIGHER PROPORTION STATE THEY SOMETIMES SHARE INFORMATION



Q.19. How often do you personally share information regarding available patient services with your patients?
Single-coded question

Base: Total Respondents **(362)**
US Respondents **(182)**

KEY FINDING #3

HCPs SEE BETTER PATIENT OUTCOMES AS THE PRIMARY REASON FOR USING SERVICES WITH PATIENTS



This holds true for the US. More HCPs in the US felt patient services had little/no benefit, however, more also saw lowering overall healthcare costs as a primary reason for using services.



Q.15. Please rank the following aspects of patient services in terms of how beneficial they are from the most beneficial aspect to the least beneficial aspect. Rating per option

Base: Total Respondents (362)
US Respondents (182)

KEY FINDING #3

HCPs SEE BETTER PATIENT OUTCOMES AS THE PRIMARY REASON FOR USING SERVICES WITH PATIENTS



Publication of results of improved patient outcomes would increase HCPs trust/belief in the value of patient services.



This holds true in the US, however, all forms of evidence were rated slightly lower in building trust/belief in the value of patient services compared to overall findings.



Q.25. What type of evidence would you like to see to increase your trust/confidence in the value of these patient services?
Multi-coded question

Base: Total Respondents (362)
US Respondents (182)

SO WHAT DO PHARMA COMPANIES DO ABOUT THIS?

FILL THE COMMUNICATION GAPS

TO ENCOURAGE MORE HCPs TO RECOMMEND PATIENT SERVICES SO THAT PATIENTS CAN ACHIEVE BETTER HEALTH OUTCOMES



For global results, please visit:
[accenture.com/patientservicessurvey](https://www.accenture.com/patientservicessurvey)

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