

Accenture Life Sciences
Patient Inspired. Outcomes Driven.

LOST IN TRANSLATION: THE COMMUNICATION GAP IN PATIENT SERVICES


 **France Results**

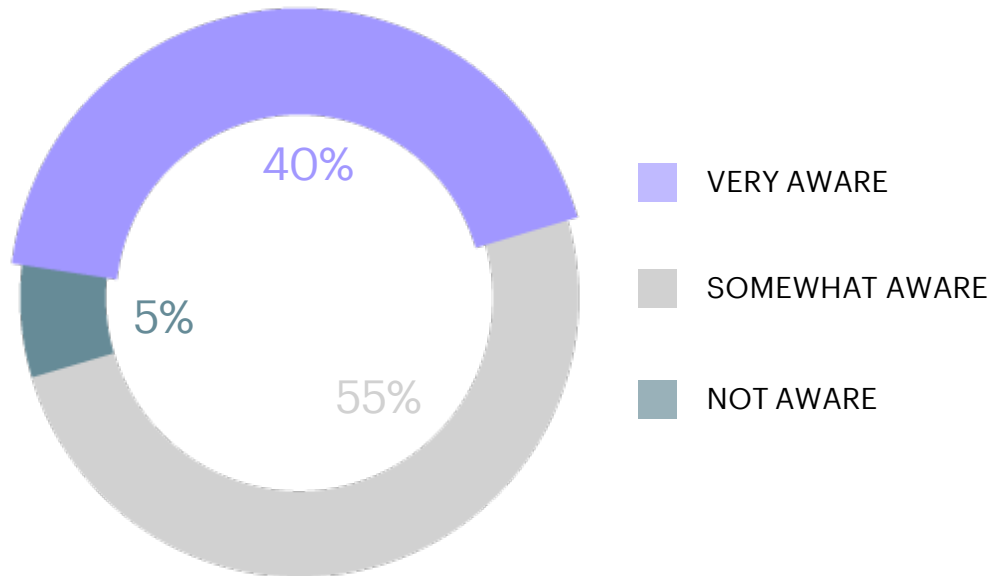
Survey of 60 France-based healthcare professionals on what their awareness, use and value of patient services is across five therapeutic areas and general practitioners.



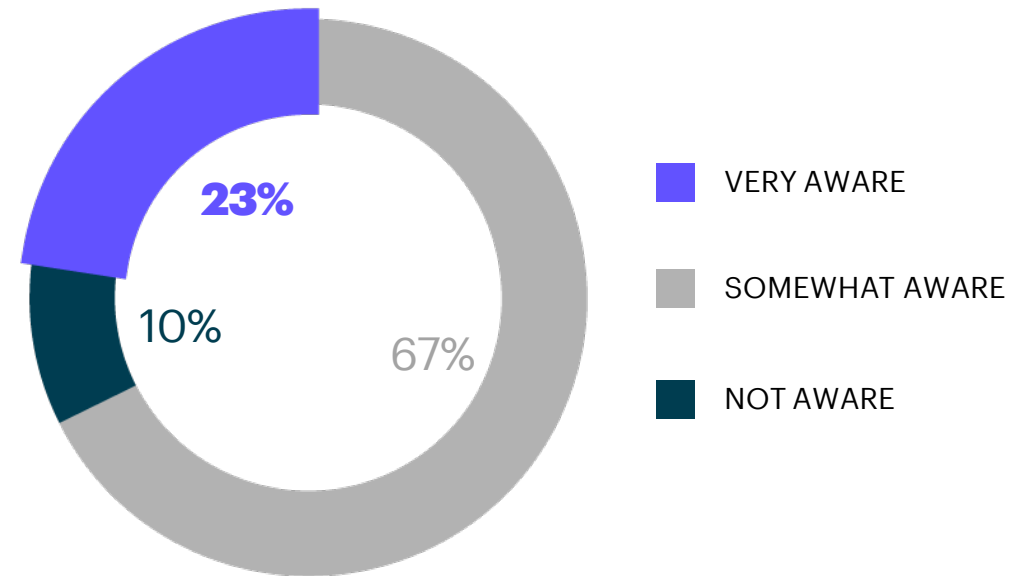
KEY FINDING #1

MOST HCPs ARE NOT VERY AWARE OF PATIENT SERVICES

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



THIS IS CONSIDERABLY LOWER IN  **FRANCE AT 23%**



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)**
France Respondents **(60)**

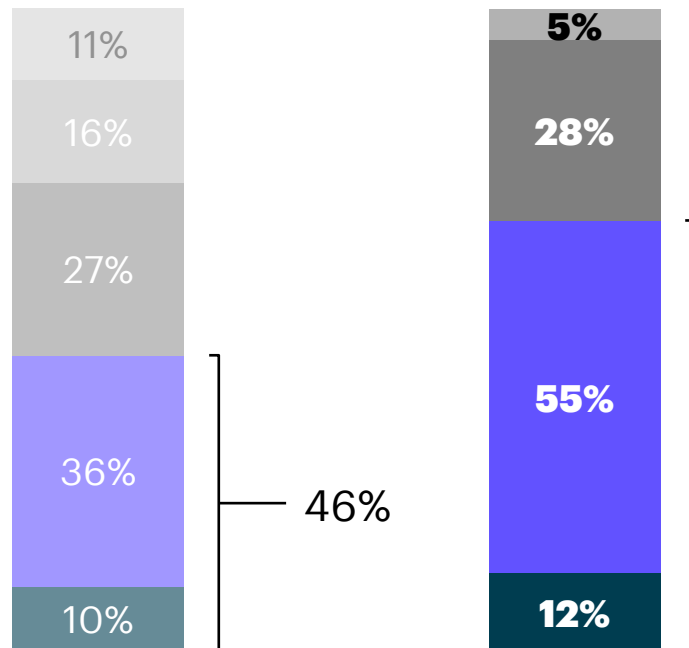
KEY FINDING #1

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.

ALL COUNTRIES

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



FRANCE

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



Almost half (46%) of HCPs hear about patient services from sales reps less than 25% of the time. This is considerably higher in France at **67%**.

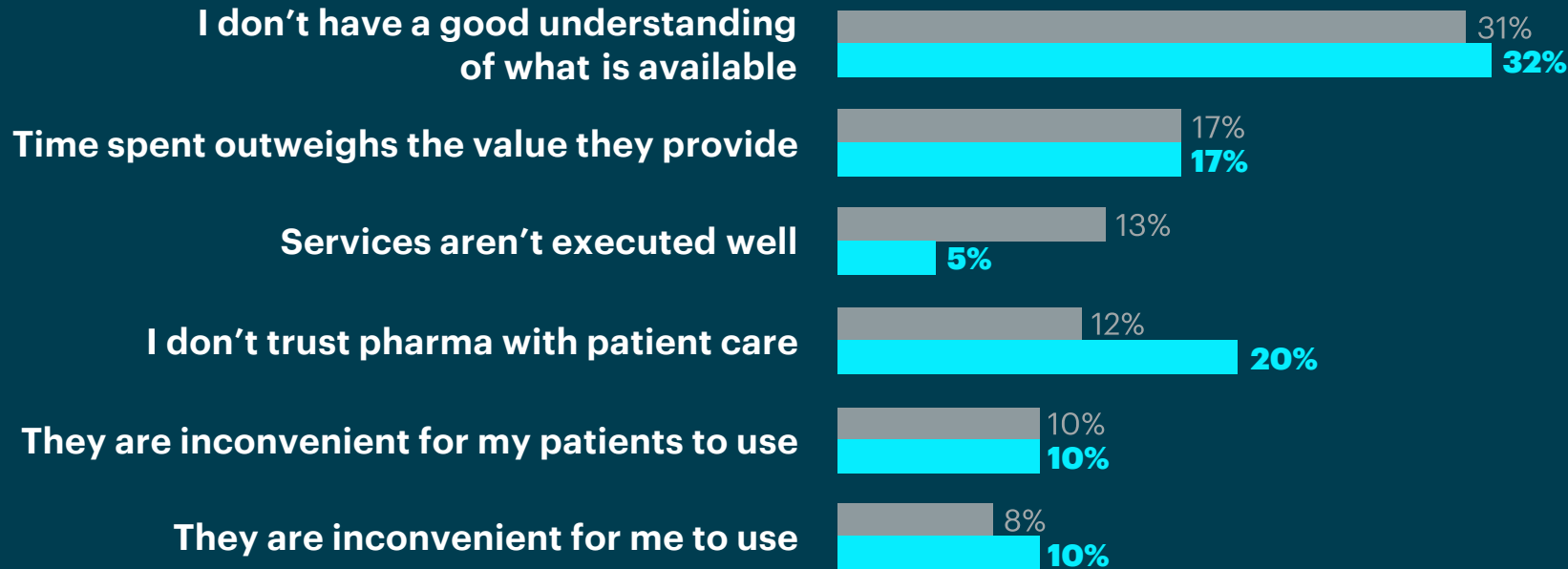
Q.8. How often do you hear about patient services during in-person visits from Sales Reps? Single-coded question

Base: Total Respondents (362)
France Respondents (60)

KEY FINDING #2

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

HCPs don't share information on patient services primarily because they don't have a good understanding of what is available. In France, HCP's are skeptical of services driven by profit and not by public health. They have more confidence when one of their colleagues has developed a service or has tested it with patients.



In France HCPs, rated not trusting pharma with patient care as the second reason.

Ranked 1st

ALL COUNTRIES

FRANCE

Q.14. What are the greatest barriers to you recommending patient services? Please rank in order from the biggest barrier to the smallest barrier. Rating per option

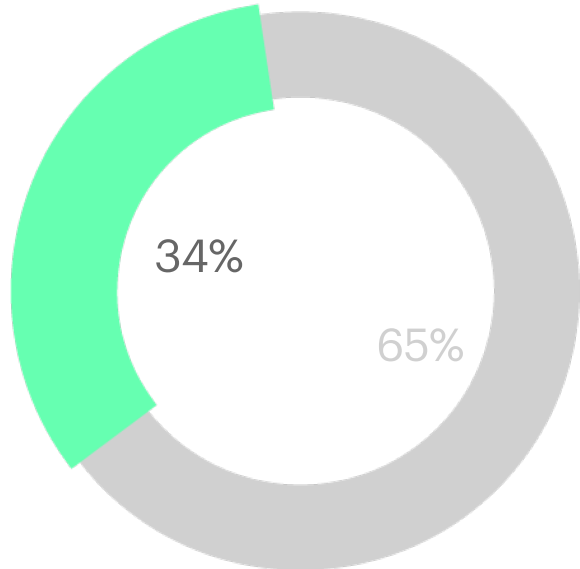
Base: Total Respondents (362)
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KEY FINDING #3

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



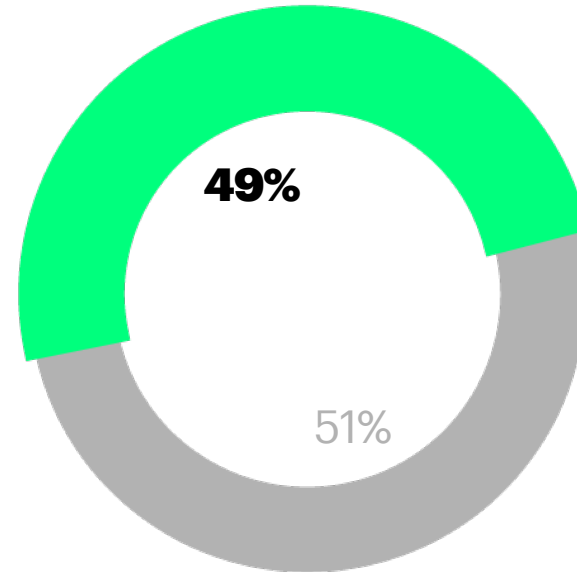
ONLY 1/3 OF SALES REPS PRESENT PATIENT SERVICES AS AN INTEGRATED SOLUTION THAT CAN HELP ACHIEVE TREATMENT OUTCOMES GLOBALLY



- PRESENT PRODUCT AND SERVICE AS A HOLISTIC AND INTEGRATED SOLUTION TO IMPROVE OUTCOMES
- PRESENT PRODUCT FIRST AND THEN THE SERVICES

THIS IS CONSIDERABLY HIGHER IN FRANCE AT

 **49%**



- PRESENT PRODUCT AND SERVICE AS A HOLISTIC AND INTEGRATED SOLUTION TO IMPROVE OUTCOMES
- PRESENT PRODUCT FIRST AND THEN THE SERVICES

Q.9. When pharmaceutical reps are talking about patient services during in-person meetings, how do they present them?
Single-coded question

Base: Total Respondents **(362)**
France Respondents **(60)**

KEY FINDING #3

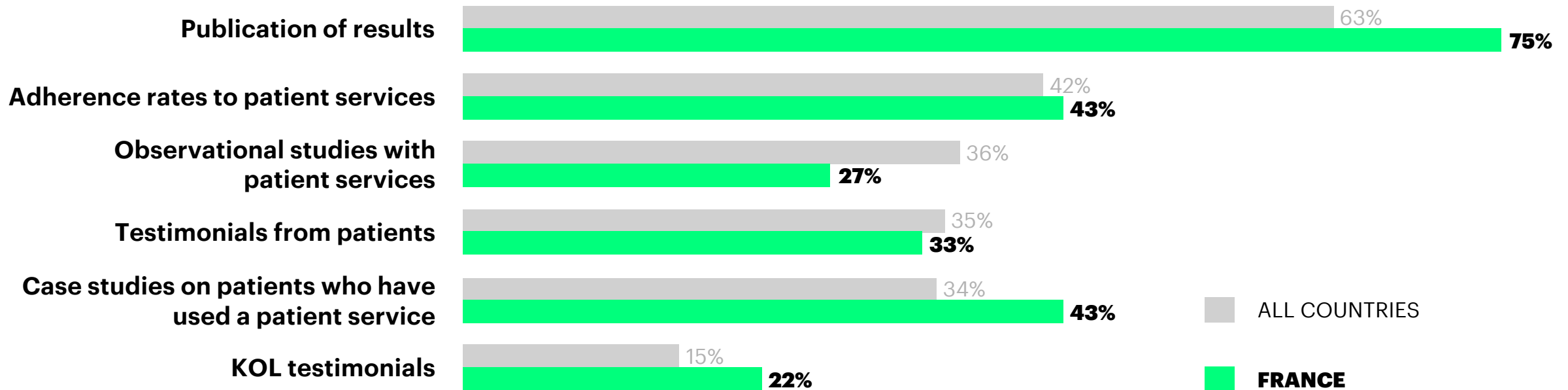
HCPs SEE BETTER PATIENT OUTCOMES AS THE PRIMARY REASON FOR USING SERVICES WITH PATIENTS



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



In France, patient case studies is a desirable form of evidence as HCP's require proof that services has value and carries results.



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

Base: Total Respondents (362)
France Respondents (60)

FILL THE COMMUNICATION GAPS



R&D & COMMERCIAL GAP

Rigorously generate evidence on the impact of patient services on outcomes—starting with clinical trials

PRODUCT AND SERVICE GAP

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

ENGAGEMENT GAP

Change the “conversations” with HCPs (and the market) to focus on outcomes—across all channels and with greater frequency.

TURN MORE HCPs INTO SUPER RECOMMENDERS AND PATIENTS INTO REGULAR BENEFICIARIES

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

AUTHORS



Diane Launay-Baillet
diane.launay-baillet@accenture.com

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