Pharma’s Growing Opportunity in Patient Services

The Patient Is IN

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Top three ways to make patients aware of services:

- Valued by 83%
- Expected increase by 36%
- Covers seven therapeutic areas:

- Today
- 2 Years

- 1 in 5 patients are aware of the services.
- Only 30% of the services in Europe that are expected to expand over the next two years offer above average patient value.
- There are some cases where patient value exceeds expected activity increase.

KEY FINDINGS

Patient services are delivering value with a significant expansion in focus and investment anticipated over the next two years.

**IMPLICATIONS**

- It will no longer be a question of if pharmaceutical companies should offer services, but which ones and how.
- Patient services will become a competitive driver.
- It’s critical to designing a service offering that is seamless and scalable.

POTENTIAL BARRIERS TO SUCCESS

- The majority of European respondents are either not aware or not interested in what patient services are.
- Much of this investment (but not all) is aligned to what respondents rate their patient-centric capabilities as strong today.
- However, just 72% of European respondents primarily make in-person communications to make patients aware of their services, relying on digital channels only 58% of the time.
- Clear organizational and operating strategy must be in place to ensure companies are structured for success.

ABOUT THE RESEARCH

Responses from 103 patient services executives in Europe on current and anticipated activities and investments in patient services across seven therapeutic areas.

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Accenture Life Sciences

Co-pay assistance +165%
Benefit coverage +108%
Direct consumer/program development +55%
Patient disease education +32%
Patient communications +22%
In person +18%
Social media +16%
Online community +13.5%

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