Accenture Life Sciences
Rethink  Reshape  Restructure...for better patient outcomes

The Patient Is IN
Pharma’s Growing Opportunity in Patient Services

Key Findings from a Survey of 200+ Patient Services Executives in the Pharmaceutical Industry in the US and Europe
The future of patient services is bright

We have been exploring the use, value, and awareness of patient services in the top global pharma markets for several years. Patients in these markets have reported, consistently, that they want—and expect—services from pharmaceutical companies. They are also increasingly seeking more services before they are treated for a disease, regardless of the type of illness they have. But perhaps most importantly, their responses to our surveys have indicated that while they highly value the services they use, the vast majority of patients do not know about the services that are already available to them.

Informed by the results of our previous research—and aware of the significant opportunities those results reveal—we focused this year on the priorities of the senior executives who are responsible for patient services in the pharmaceutical industry. We surveyed more than 200 patient services executives (100 based in the United States and 103 based in Europe) to develop a benchmark of where pharmaceutical companies stand with regard to patient services and where they intend to go over the next two years. Our survey covered seven therapeutic areas: heart, lungs, brain, immune systems, bones, hormone/metabolism and cancer. (For more detail, see the About the Research section at the end of this document.)

We were interested in:
- How much pharmaceutical companies are investing in patient services
- What they plan to invest in and why
- The extent to which they believe they are meeting patient needs and improving outcomes
- How they are communicating the availability of their patient services, and
- How they measure the effectiveness of these programs

This brief report presents a market-based view of the current and future state of patient services. It is intended to help pharmaceutical companies hone in on the services that present the highest potential—for them and the people who use their therapeutics—and prepare for the increasing demand, from patients and from healthcare systems, for better patient outcomes.
KEY FINDING 1

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

There is clear evidence that pharmaceutical companies are deriving value from the patient services they offer today. Nine of the top ten most prevalent services (and service-related capabilities) offered today are driving above-average business impact, according to survey respondents (see Figure 1). Patient segmentation*, the second most prevalent service, leads the way in terms of delivering business impact.

There is also clear evidence there will be a significant ramp up in investment in patient support services. Over the next two years, the vast majority of respondents (85%) said they are raising their investments in capabilities in this area. Just half (51%) of respondents report that their capabilities here are strong today and say they have made little progress over the last two years (see Figure 2).

Companies’ plans to increase their efforts to better support patients are further exemplified by an increase in the depth and breadth of patient services they intend to offer. Almost all of the companies surveyed (91%) expect to offer six or more patient services over the next two years, up from 73% of those offering six or more today. The average number of patient services offered by pharmaceutical companies is expected to increase by more than 50% in two years (see Figure 3). Some of the biggest increases are anticipated in benefit coverage and access support (+100%), health counselors (+77%) and adherence program management (+73%) (see Figure 4).

85% of companies are raising their investment in patient-centric capabilities over the next 18 months.

*Segmenting patients into groups that share common traits and behaviors to better serve their specific needs.
### Figure 1

**9 of the top 10 services offered by companies are driving above average business impact.**

<table>
<thead>
<tr>
<th>Top ten services offered vs Business impact</th>
<th>Services offered*</th>
<th>Business impact</th>
</tr>
</thead>
<tbody>
<tr>
<td>Patient disease education</td>
<td>82</td>
<td>46</td>
</tr>
<tr>
<td>Patient segmentation and insight</td>
<td>75</td>
<td>75</td>
</tr>
<tr>
<td>Patient experience management</td>
<td>42</td>
<td>72</td>
</tr>
<tr>
<td>Medication delivery/support</td>
<td>66</td>
<td>66</td>
</tr>
<tr>
<td>Patient risk assessment</td>
<td>39</td>
<td>39</td>
</tr>
<tr>
<td>Wellness information and health management</td>
<td>65</td>
<td>65</td>
</tr>
<tr>
<td>Nurse/physician/patient access portal</td>
<td>51</td>
<td>51</td>
</tr>
<tr>
<td>Medication/treatment reconciliation</td>
<td>42</td>
<td>42</td>
</tr>
<tr>
<td>Patient outreach, reminders, and scheduling</td>
<td>62</td>
<td>62</td>
</tr>
<tr>
<td>Adherence program management</td>
<td>57</td>
<td>39</td>
</tr>
</tbody>
</table>

(Cited by companies in top three)

All numbers represent percentages. Average business impact - 33%

### Figure 2

**Companies have only become slightly more patient-centric over the past two years.**

**How would you rate your patient-centric capabilities?**
(People, technology, partnerships combined)

- **Strong Two Years Ago**: 46%
- **Strong Today**: 51%

*Now and in 2 years*
**Figure 3**

Companies are planning to significantly increase the breadth of services they offer over the next two years.

**Figure 4**

There will be a significant increase in focus and investment in patient services.

Top 12 (of 24) services to be offered within next two years (Ranked by overall % expected increase)

<table>
<thead>
<tr>
<th>Service</th>
<th>Now</th>
<th>In 2 years</th>
<th>Increase</th>
</tr>
</thead>
<tbody>
<tr>
<td>Benefit coverage and access support (BIPA/Appeals)</td>
<td>26%</td>
<td>26%</td>
<td>100%</td>
</tr>
<tr>
<td>Transportation arrangements</td>
<td>19%</td>
<td>16%</td>
<td>86%</td>
</tr>
<tr>
<td>Engagement insight development</td>
<td>30%</td>
<td>25%</td>
<td>84%</td>
</tr>
<tr>
<td>Health coach/counselor</td>
<td>18%</td>
<td>14%</td>
<td>77%</td>
</tr>
<tr>
<td>Adherence program management</td>
<td>33%</td>
<td>24%</td>
<td>73%</td>
</tr>
<tr>
<td>Co-pay assistance programs</td>
<td>19%</td>
<td>13%</td>
<td>70%</td>
</tr>
<tr>
<td>Remote monitoring</td>
<td>31%</td>
<td>21%</td>
<td>68%</td>
</tr>
<tr>
<td>Affordability and reimbursement support; Alternative coverage/PAP</td>
<td>23%</td>
<td>15%</td>
<td>66%</td>
</tr>
<tr>
<td>Nursing support services</td>
<td>34%</td>
<td>22%</td>
<td>64%</td>
</tr>
<tr>
<td>Billing and coding assistance</td>
<td>32%</td>
<td>19%</td>
<td>60%</td>
</tr>
<tr>
<td>Reward/incentive programs</td>
<td>32%</td>
<td>19%</td>
<td>58%</td>
</tr>
<tr>
<td>Medication delivery/support</td>
<td>47%</td>
<td>26%</td>
<td>55%</td>
</tr>
</tbody>
</table>
Companies are going big with investments in digital engagement technologies and supporting analytics.

There’s an app for that? With patients’ increasing ability to access an ever-growing array of information relating to their health and care through their phones, computers, and the like, the vast majority of companies (95%) plan to invest in patient engagement technologies over the next 18 months (see Figure 5).

Most (66%) are directing their largest investments in this area towards technologies that interface with patients and healthcare professionals. But analytics and reporting metric technologies are also a priority along with patient data management technologies. Smart connected devices is the fourth largest area of investment with 41% indicating intent to invest.

Digital channels of communication dominate when it comes to making patients aware of services whether a company is going through healthcare professionals, healthcare providers (such as hospitals or clinics), or directly to the patient (see Figure 6). When companies communicate with patients through healthcare providers, for example, digital channels command the second (social media, 43%) and third (web pages, 37%) means of engagement, after in-person communication (64%). And when companies communicate directly with patients, the three top channels are digital: social media (55%), web page (48%), and online communities (47%).

These results vary slightly between respondents in the US and in Europe. In the US, television is the number one way in which pharmaceutical companies make consumers aware of services (53%), with social media (51%) and web page (48%) coming in second and third. In Europe, social media (59%), direct emails (50%), and online communities (48%) are the top three ways pharma companies use to make consumers and patients aware of services.

**Figure 5**

95% of companies are planning to invest in patient engagement technologies over the next 18 months.

In which of the following patient engagement technologies do you plan to invest in the next 18 months? (Multiple responses)

- Patient and healthcare professional-facing technology:
  - Total: 66%
  - US: 63%
  - Europe: 68%

- Data analytics and metrics reporting and tracking technology:
  - Total: 56%
  - US: 51%
  - Europe: 60%

- Patient data management technology:
  - Total: 53%
  - US: 46%
  - Europe: 60%

- Smart, connected devices:
  - Total: 41%
  - US: 51%
  - Europe: 39%

- None, we don’t plan to make investments in patient engagement technology in the next 18 months:
  - Total: 5%
  - US: 8%
  - Europe: 2%
Please rank the top three ways in which you make your patients aware of your services.
(Percentage of respondents citing channel in top three)

<table>
<thead>
<tr>
<th>Method</th>
<th>Social media</th>
<th>Web page</th>
<th>In person</th>
<th>Institutional partnerships</th>
<th>Account management</th>
<th>Pricing and contract management</th>
<th>Clinical specialists</th>
<th>External patient services organization</th>
<th>Through the sales organization</th>
<th>Through the commercial organization</th>
<th>External patient services organization</th>
<th>Payer communications</th>
</tr>
</thead>
<tbody>
<tr>
<td>Through Healthcare professionals</td>
<td>43%</td>
<td>37%</td>
<td>64%</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>72%</td>
</tr>
<tr>
<td>Through healthcare providers (e.g., hospitals, clinics, etc.)</td>
<td>55%</td>
<td>48%</td>
<td>42%</td>
<td>38%</td>
<td>16%</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>59%</td>
</tr>
<tr>
<td>Direct consumer/patient communications</td>
<td>55%</td>
<td>48%</td>
<td>42%</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>33%</td>
</tr>
<tr>
<td>Through commercial payers</td>
<td>73%</td>
<td>62%</td>
<td>64%</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>29%</td>
</tr>
<tr>
<td>Through pharmacies</td>
<td>38%</td>
<td>33%</td>
<td>29%</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>26%</td>
</tr>
<tr>
<td>Through government payers</td>
<td>72%</td>
<td>59%</td>
<td>55%</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>26%</td>
</tr>
</tbody>
</table>
**KEY FINDING 3**

**Much of this investment (but not all) is aligned to what patients value.**

Of the top ten patient services expected to grow the most in the future, only half align with what patients currently value most (see Figure 7). There are some services where patient value greatly exceeds the intent to expand the services. For example, medication delivery/support is highly valued by 85% of patients but the offering of the services is only expected to increase by 55%. Meanwhile, patient outreach, reminders and scheduling is highly valued by 79% of patients but service offering is expected to expand by just 54%.

Patient services is in many ways “growing up.” In the early days, companies offered simple services such as disease education and copay cards. These services are now common across companies, and so they are no longer points of differentiation. Over the last two years, companies have begun to invest in more innovative services, such as remote monitoring. As the field of patient services matures, leading companies in the space are seeking to invest in more innovative and technology-driven offerings.

**Figure 7**

**50% of the top 10 fastest growing services are perceived by patients to deliver significant value.**

*All numbers represent percentages. Average patient value - 76%*
The momentum is clear; pharmaceutical companies are committed to increasing, expanding, and improving the services they offer patients. However, our survey revealed potential barriers to delivering on the desired objectives of improving patient outcomes and delivering business value—most specifically in communication, measurement, and organization.

1. Communication
Perhaps the most striking challenge that pharmaceutical companies face with regard to their patient services offerings is simply making patients aware that these services exist. Our 2015 survey of 10,000 patients around the world revealed that fewer than one in five patients (19%) are aware of the services that are available to them through the companies that supply their therapeutics (see Figure 8).

Why is that? According to our survey, most pharma companies (81%) go through healthcare professionals to make patients aware of their services which is how patients prefer to hear about them. But clearly that information is not making its way from healthcare professionals to the patients in the vast majority of cases. Healthcare professionals are either not relaying information about services to their patients, or not doing so in a way that patients are meaningful enough for patients to remember them.

Figure 8

Healthcare professionals are the most commonly used channel for raising awareness of services, followed by healthcare providers.

Please rank the top three ways in which you make your patients aware of your services. (Mentioned in Top Three)

Only 1 in 5 patients are aware of the services available to them.
2. Measurement

Less visible, but equally important, is the barrier presented by the contrast between the reason most pharmaceutical companies are investing in patient services—which is to improve patient outcomes—and their ability to measure those outcomes.

Across the US and Europe, the number one objective for investing in patient services is to improve patient outcomes (see Figure 9). And yet fewer than half of respondents (40%) reported that their companies can precisely measure their impact on patient outcomes (see Figure 10).

In the future, pharmaceutical companies will be increasingly assessed on their ability to create value at the population level and for healthcare systems overall. That is, it won’t be enough to supply a therapeutic with a proven clinical value. What will matter, increasingly, is how that therapeutic performs in the population it intends to help.² Performance will be measured in a real world setting, and that’s why pharmaceutical companies must sharpen their ability to quantify those results—both for patient value and for sustaining internal investments in these programs. Market leaders will focus on capturing the impact of their services, use this information to adapt what they provide and differentiate from competitors beyond the therapeutic benefits of their drugs.

Figure 9

**Improved patient outcomes are the #1 objective in offering patient services.**

What are your objective(s) in offering patient services? (Multiple responses)

<table>
<thead>
<tr>
<th>Objective</th>
<th>Total</th>
<th>US</th>
<th>Europe</th>
</tr>
</thead>
<tbody>
<tr>
<td>Improved patient outcomes</td>
<td>67%</td>
<td>38%</td>
<td>43%</td>
</tr>
<tr>
<td>Improve healthcare professional relationships</td>
<td>59%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Improve patient experience/satisfaction</td>
<td>59%</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

²Healthcare Disrupted, Next Generation Business Models and Strategies
3. Organization
The challenge pharmaceutical companies are facing here is that the ownership for “patient services” is often spread across organizations—even when it appears to have a person or group leading it. Sixty-two percent of our survey respondents identified themselves as a head of patient services or patient experience, however, roughly three quarters (73%) of respondents say that no single function has primary responsibility for patient services within their organization. In fact, on average, they told us that responsibility for patient services is spread over 2.5 functions—even when the company has separate patient service or experience function.

62% of respondents identified themselves as Chief Patient Officer, Chief Patient Experience Officer, Patient Services Director/Executive, or Patient Services Lead

73% of respondents cited more than one team owns services across brands; on average, they cited 2.5 teams
Patient services will become a competitive driver and are no longer optional for pharmaceutical companies.

Pharmaceutical companies should no longer be asking whether they should offer services. Instead, they should ask which ones to offer, and how best to offer them.

Investment should be led by what patients value, but measuring business value is critical to sustainability.

Pharmaceutical companies should purposefully and thoughtfully seek to understand their patients’ needs and set their patient services strategy accordingly. However, they should also be acutely aware that the impact of their investments in patient services could be called into question without a robust ability to measure and prove patient and business value. Without such a capability, they could put future investment dollars—and their ability to deliver business impact—at risk.

Clear organizational and operating strategy must be in place to ensure companies are structured for success.

There is no blueprint for structuring patient services in a pharmaceutical company. Shared ownership (across departments or functions) may make sense for some while managing services centrally may be right for others. But, what is essential is clarity throughout the organization where “ownership” of the services and the strategy reside. Mixed ownership can create inefficiencies, limit innovation, and hinder a company’s ability to measure impact.

Articulating the patient and economic value of services needs to be central to healthcare professional interactions.

Most pharmaceutical companies are using healthcare professionals as the primary way to make patients aware of their services—but this channel has yet to be effective. Many companies treat services as the afterthought to their product conversations with healthcare professionals. Instead, they should frame their conversations about the outcomes that can be achieved through the combination of products AND services. Once healthcare professionals view the bundled solution as integral to achieving the better outcomes, they will naturally be much more inclined to discuss the solution with the patients.

So what does this all mean for pharmaceutical companies?
About the Research

Accenture retained Maguire Research to conduct an online survey of 203 patient services executives in the pharmaceutical industry across the United States (100 respondents) and Europe (103 respondents) between October 2015 and November 2015. The survey questions were intended to benchmark current and anticipated activities and investment in patient services. Forty respondents represented organizations with more than $25 billion in annual revenues; 28 represented companies with between $11 - $25 billion in revenues; 65 came from companies with between $6 - $10 billion in revenues; 69 represented companies with between $1 - $5 billion in revenues; one respondent represented an organization with less than $1 billion in revenues.

Covers seven therapeutic areas:

- Heart
- Lungs
- Brain
- Cancer
- Immune System
- Bones
- Hormones/Metabolism
About Accenture Life Sciences

Accenture's Life Sciences group is dedicated to helping companies rethink, reshape or restructure their businesses to deliver better patient outcomes and drive shareholder returns. We provide end-to-end business services as well as individual strategy, digital, technology and operations projects around the globe in all strategic and functional areas—with a strong focus on R&D, Sales & Marketing and the Supply Chain.

We have decades of experiences working hand-in-hand with the world’s most successful companies to improve their performance across the entire Life Sciences value chain. Accenture’s Life Sciences group connects more than 10,000 skilled professionals in over 50 countries who are personally committed to helping our clients achieve their business objectives and deliver better health outcomes for people around the world.

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