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

<table>
<thead>
<tr>
<th>Percentage Range</th>
<th>ALL COUNTRIES</th>
<th>FRANCE</th>
</tr>
</thead>
<tbody>
<tr>
<td>76% - 100% OF THE TIME</td>
<td>11%</td>
<td>5%</td>
</tr>
<tr>
<td>51% - 75% OF THE TIME</td>
<td>16%</td>
<td>28%</td>
</tr>
<tr>
<td>26% - 50% OF THE TIME</td>
<td>27%</td>
<td>55%</td>
</tr>
<tr>
<td>&lt;25% OF THE TIME</td>
<td>36%</td>
<td>12%</td>
</tr>
<tr>
<td>NEVER</td>
<td>10%</td>
<td>67%</td>
</tr>
</tbody>
</table>

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.

<table>
<thead>
<tr>
<th>Reason</th>
<th>ALL COUNTRIES</th>
<th>FRANCE</th>
</tr>
</thead>
<tbody>
<tr>
<td>I don’t have a good understanding of what is available</td>
<td>31%</td>
<td>32%</td>
</tr>
<tr>
<td>Time spent outweighs the value they provide</td>
<td>17%</td>
<td>17%</td>
</tr>
<tr>
<td>Services aren’t executed well</td>
<td>13%</td>
<td>5%</td>
</tr>
<tr>
<td>I don’t trust pharma with patient care</td>
<td>12%</td>
<td>20%</td>
</tr>
<tr>
<td>They are inconvenient for my patients to use</td>
<td>10%</td>
<td>10%</td>
</tr>
<tr>
<td>They are inconvenient for me to use</td>
<td>8%</td>
<td>10%</td>
</tr>
</tbody>
</table>

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

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)  France Respondents (60)
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**

- **65%**
  - Present product first and then the services
- **34%**
  - Present product and service as a holistic and integrated solution to improve outcomes

**THIS IS CONSIDERABLY HIGHER IN FRANCE AT 49%**

- **51%**
  - Present product and service as a holistic and integrated solution to improve outcomes
- **49%**
  - 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?

Base: Total Respondents (362)
France Respondents (60)
SO WHAT DO PHARMA COMPANIES DO ABOUT THIS?

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