Survey of 60 UK-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

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

THIS IS CONSIDERABLY LOWER IN THE UK AT ONLY 22%

Base: Total Respondents (362)
UK Respondents (60)
KEY FINDING #1
MOST HCPs ARE NOT VERY AWARE OF PATIENT SERVICES

Across all countries, sales reps are the primary way HCPs hear about patient services. In the UK, conferences are the primary way HCPs hear about patient services, followed by sales reps. In addition, e-mail and hospitals are also more impactful channels in the UK compared to the overall findings.

Q.6. Please select the top 5 channels through which you hear/learn about patient services offered by pharmaceutical/biotech companies the most. Please rank them in order of the channel you hear about patient services the most, to the channel you hear through the least. Rating per option

Base: Total Respondents (362)
UK Respondents (60)
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 SLIGHTLY HIGHER IN THE UK **AT 18%**, BUT STILL VERY LOW

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

Base: Total Respondents (362)
UK Respondents (60)
### KEY FINDING #3
**HCPs SEE BETTER PATIENT OUTCOMES AS THE PRIMARY REASON FOR USING SERVICES WITH PATIENTS**

Delivering a better patient outcome is the highest in the UK, far higher than the average seen across all countries.

<table>
<thead>
<tr>
<th>Aspect</th>
<th>UK (%)</th>
<th>All Countries (%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>They help me deliver a better patient outcome</td>
<td>28%</td>
<td>42%</td>
</tr>
<tr>
<td>They help me provide patient care and support outside of my office environment and it easier for my patients to self-manage their disease</td>
<td>17%</td>
<td>21%</td>
</tr>
<tr>
<td>They provide valuable information to my patients</td>
<td>19%</td>
<td>25%</td>
</tr>
<tr>
<td>They have little/no benefits</td>
<td>5%</td>
<td>14%</td>
</tr>
<tr>
<td>They lower overall healthcare costs</td>
<td>2%</td>
<td>10%</td>
</tr>
</tbody>
</table>

**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)
UK 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 the UK, all forms of evidence would increase confidence in the value of service compared to the overall findings across all countries.

<table>
<thead>
<tr>
<th>Evidence Type</th>
<th>ALL COUNTRIES</th>
<th>UK</th>
</tr>
</thead>
<tbody>
<tr>
<td>Publication of results</td>
<td>63%</td>
<td>67%</td>
</tr>
<tr>
<td>Adherence rates to patient services</td>
<td>42%</td>
<td>58%</td>
</tr>
<tr>
<td>Observational studies with patient services</td>
<td>36%</td>
<td>53%</td>
</tr>
<tr>
<td>Testimonials from patients</td>
<td>35%</td>
<td>52%</td>
</tr>
<tr>
<td>Case studies on patients who have used a patient service</td>
<td>34%</td>
<td>42%</td>
</tr>
</tbody>
</table>

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)  UK Respondents (60)
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

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.
For global results, please visit: accenture.com/patientservicessurvey

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