

The Patient Is IN

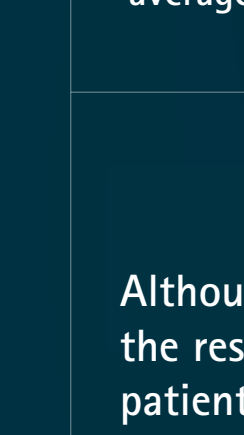
Pharma's Growing Opportunity in Patient Services



ABOUT THE RESEARCH

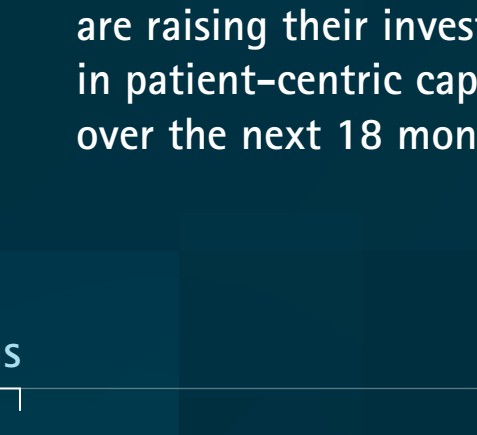
Responses from more than 200 patient services executives in the US and Europe on current and anticipated activities and investments in patient services across seven therapeutic areas.

KEY FINDINGS



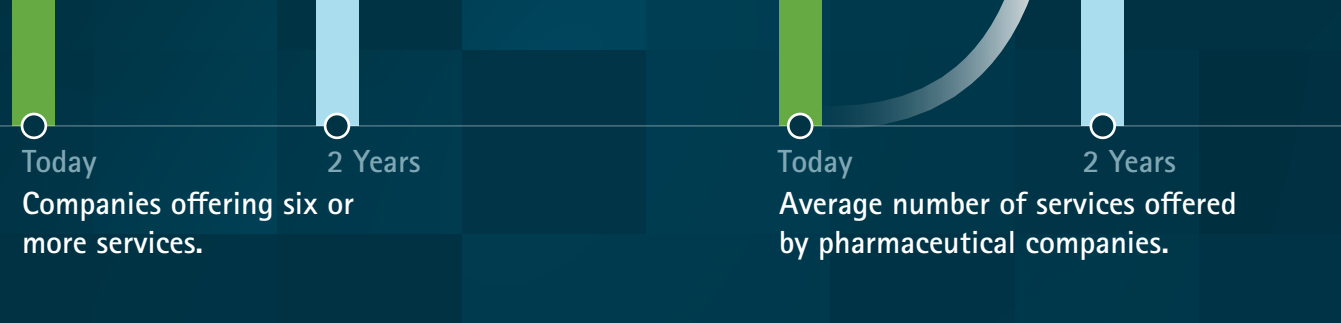
Patient services are delivering value with a significant increase in focus and investment expected over the next two years.

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



Although only 1/2 of the respondents rate their patient-centric capabilities as strong today.

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



3 of the top increases in services offered over the next 2 years:



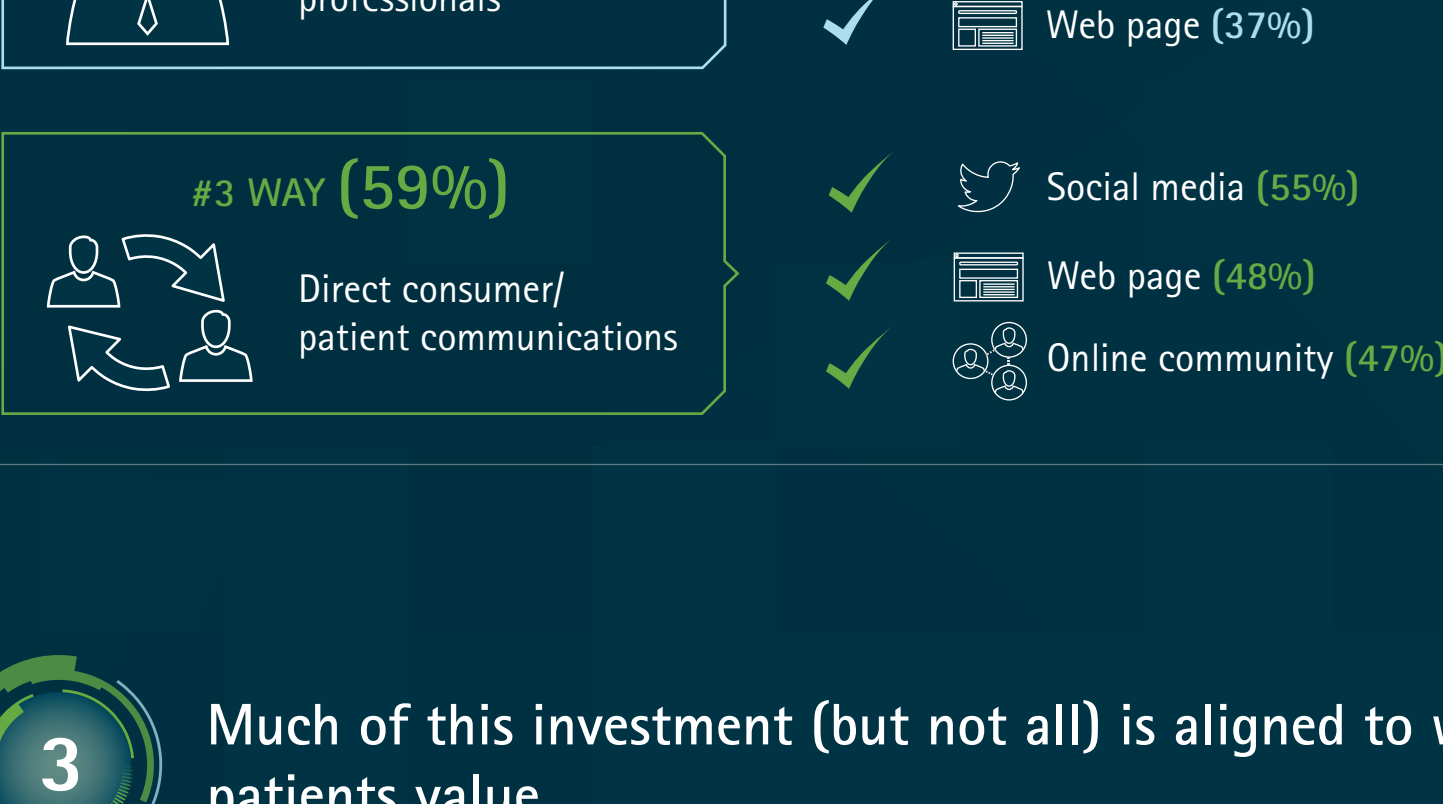
Companies are going big with investments in digital engagement technologies and supporting analytics.



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

Digital channels play a dominant role in making patients aware of their services.

Top three ways to make patients aware of services:



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

50% of the services expected to grow the most are highly valued by patients.

There are some cases where patient value exceeds expected expansion in service offering:



POTENTIAL BARRIERS TO SUCCESS

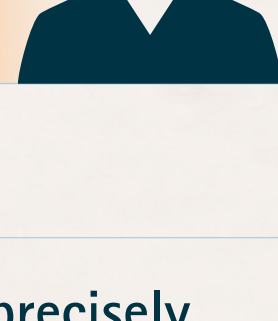


Companies primarily make patients aware of their services through healthcare professionals, however, less than 1 in 5 patients are aware of the services.

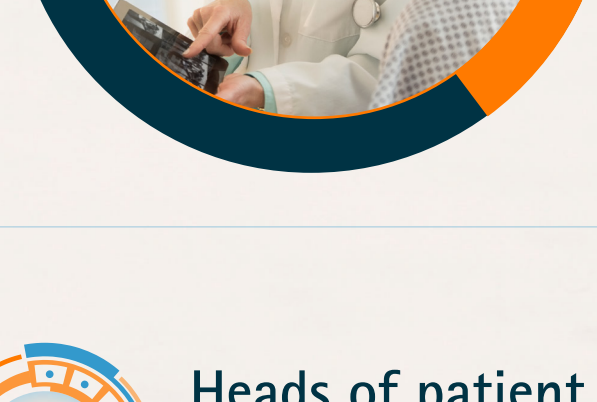
81% of companies go through healthcare professionals to make patients aware of their services, relying on in-person communication 64% of the time.



However, just 19% of patients are aware of the services available from pharmaceutical companies.



The majority of companies are not able to precisely measure the impact of patient services on outcomes.

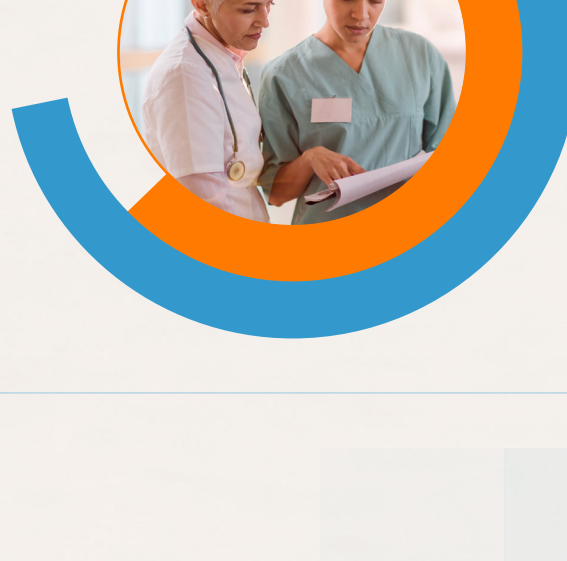


Companies cite improved patient outcomes as their #1 objective but only 40% of respondents are able to precisely measure it.



Heads of patient services/experience are rapidly emerging but without full ownership of the patient experience.

62% of respondents identified themselves as ahead of patient services or patient experience.



And yet 73% of respondents don't see a single group as having responsibility for patient services – on average, they cited 2.5 different groups having this responsibility.

IMPLICATIONS



Patient services will become a competitive driver and are no longer optional for pharmaceutical companies.

It will no longer be a question of if pharmaceutical companies should offer services, but which ones and how.



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

Invest in understanding the needs of patients to direct your patient services strategy.

Develop a robust measurement capability to ensure your patient services are delivering the desired patient outcomes and business value.



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

Mixed or unclear ownership may create inefficiency and limit the impact of services.



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

Focus conversations on the outcomes achieved by the solutions (products + services) you offer. When healthcare professionals see the bundled solution as integral to achieving better outcomes, they will be much more inclined to discuss the solution with the patient.

For the full report, visit: accenture.com/patientservices2016

100 patient services executives based in the US and 103 from Europe



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Covers seven therapeutic areas:

