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MOVE THE NEEDLE

Amplifying the signal for patient services: Strengthening the patient engagement model to increase adoption and impact

Accenture Life Sciences

Patient Inspired. Outcomes Driven.

Over the past five years, we have seen increased investment by pharmaceutical companies in patient services, expansion of services in tandem with new specialty healthcare products, and more evidence of how these services provide value to patients.

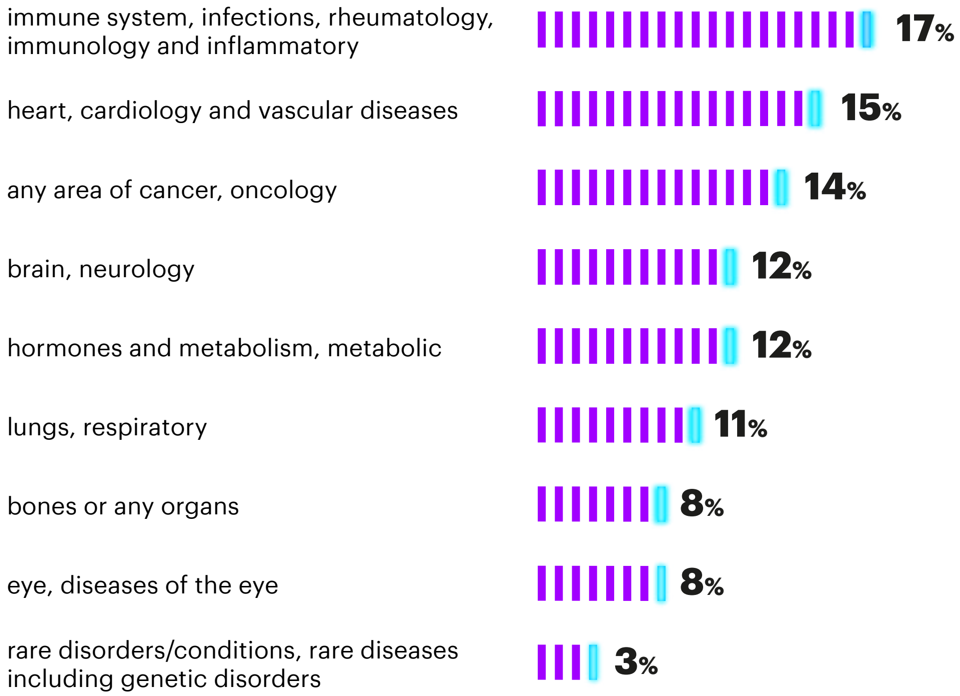
However, in a 2020 global survey of 12,000 patients in six countries, we found no corresponding increase in awareness and utilization of the patient services being offered. It's clear that the current model for how pharma companies engage with HCPs and patients has reached its limit.

Tuning into the Accenture Global Patient Services Survey

This year's survey was conducted as a follow-up to an Accenture patient services survey completed in 2015 (Patient Services, Pharma's best kept secret[1]). This year's survey looks at how the uptake and experience of patient services has changed between 2015 and 2020.

Survey data was collected in May–June 2020, with 12,000 participating patients in 6 countries (Brazil, France, Germany, Japan, UK, USA), across a range of medical conditions. We compared the 2020 data with data from our 2015 survey on patient services to examine progress and identify areas for improvement.

Fig. 1: Survey participant medical conditions



12,000
participants
equally spread across:
Brasil | Japan | France | United Kingdom Germany | USA

Introduction

Amplifying the signal for patient services: Strengthening the patient engagement model to increase adoption and impact

A patient's journey can be difficult and complex, as they face often hard-to-understand information about a diagnosis and choices to be made regarding treatment and therapy options. To support patients on their journeys, pharmaceutical companies have introduced services intended to guide them through treatment, including information on the medical and financial aspects of care, as well as day-to-day care management such as medication reminders, symptom monitoring, and nursing support. These services have become even more relevant with the evolution of New Science[2], which has seen a proliferation of specialty products entering the market, each with its own suite of support services to help navigate complex treatment programs.

In 2015, our survey findings showed that patient awareness of available support services was low, effectively dampening wider adoption and improved outcomes. Five years later, we sought to understand how the growing investments by pharmaceutical companies, the evidence of patient service value, and the new realities of COVID-19 have impacted healthcare providers (HCPs) and patients.

In our examination of all this data, we looked to answer this question: What can be done to better connect patients to the services they need? In this report, we explore key findings in our survey and propose how pharma companies can move the needle by fine tuning their programs to raise awareness and use of patient services.

We tuned into three key findings

#1

The signal is getting lost. Despite significant investment in patient services by pharma companies, patient awareness is no higher than it was five years ago. Adoption rates are also stagnant, even though patients who utilize the services find them highly valuable. The current signals being used to reach patients are getting lost, requiring new approaches.

#2

The need to create surround-sound to amplify the message. Healthcare providers play a critical role in providing patients awareness and access to support services. The signal is not only getting lost in reaching patients, but also in reaching physicians. While the industry has invested in services to provide more care support to patients, the proliferation of services has created more complexity for physicians to navigate. New models of engagement are required to enable physicians to readily access and incorporate patient services into their treatment planning.

#3

Patients are ready to receive information and care via new channels. COVID-19 has driven patient adoption of technologies to access healthcare more conveniently, accelerating an expected shift towards digitally enabled services and therapy self-administration. This openness to non-traditional engagement channels provides a tremendous opportunity to move the needle in adoption and use of patient services.

Figure 2: Patient Services Improve Outcomes

- Asthma patients using an inhaler sensor and GPS were able to understand and avoid environmental triggers, with a 78% reduction in rescue inhaler use and 48% more symptom-free days.[4]
- Lung cancer patients using a smartphone app to monitor 13 common symptoms had a 7-month overall survival benefit and improved resource utilization.[5]
- Patients with cancer who used a smartphone app to monitor pain and identify urgent issues had lower pain severity and 40% fewer inpatient hospital admissions.[6]
- Patients with Crohn's Disease who enrolled in patient services were 17% more likely to start therapy and achieve remission.[7]
- Diabetes patients using a patient portal, especially those with multiple chronic conditions, had fewer emergency room visits and hospital stays[8]

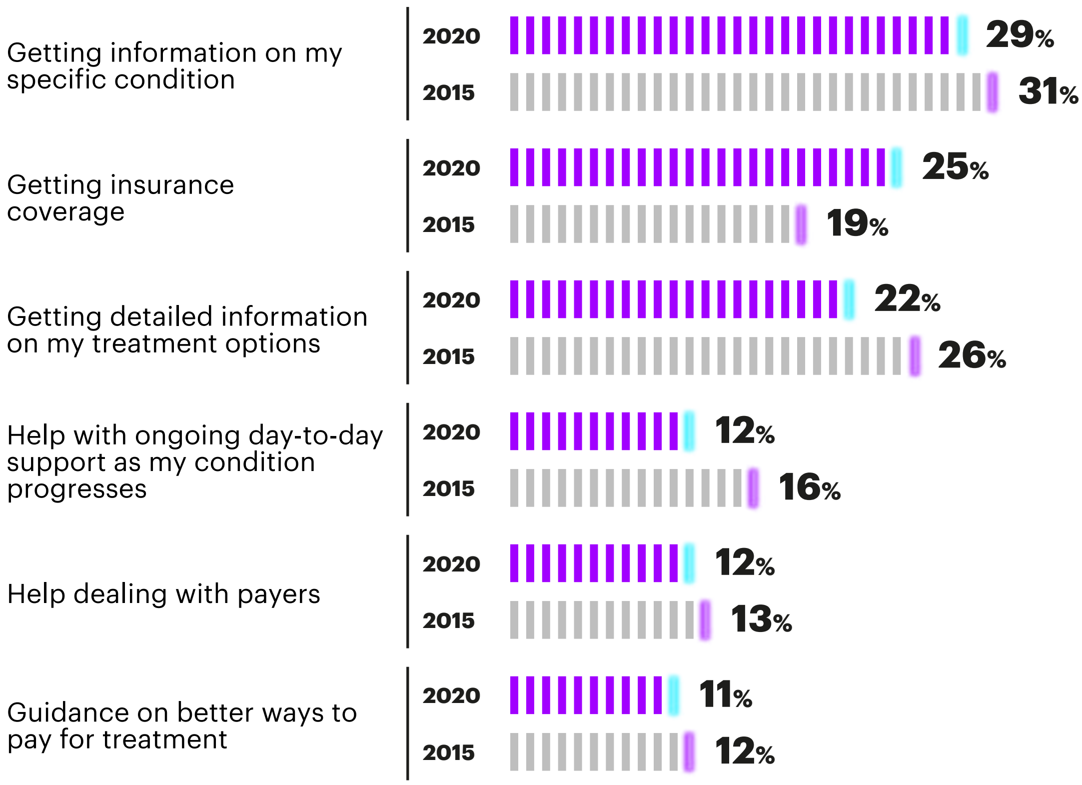
#1

The signal is getting lost: While investment continues, the message isn't getting through to patients.

Patient services are on a growth trajectory. Pharma companies are investing heavily—the market for patient engagement solutions was worth $8.8 billion in 2017 and is projected to reach $18.68 billion in 2022, **an annual growth rate of 16.2%**.[3]

The ongoing investment isn't surprising, as research on the effectiveness of specific patient services has found an array of positive impacts for both health and economic outcomes. When patients tune into the services offered, adherence increases, quality of life improves, hospitalizations and ER visits are reduced, and survival rates rise (see figure 2). Life sciences companies are having pockets of success, as are other health care organizations more broadly.

Fig. 3: Percent of patients aware of each service



However, even as investment and evidence of outcomes have grown, when we compared survey responses from 2015 to 2020, awareness and adoption of patient services did not improve. In fact, on average, just 16% of the 12,000 patients surveyed were aware of services that help patients adhere to the therapy or treatment plan (Medication Delivery / Support, Adherence Program, Risk Surveys, Medication Treatment Reconciliation, Reminders and Scheduling).

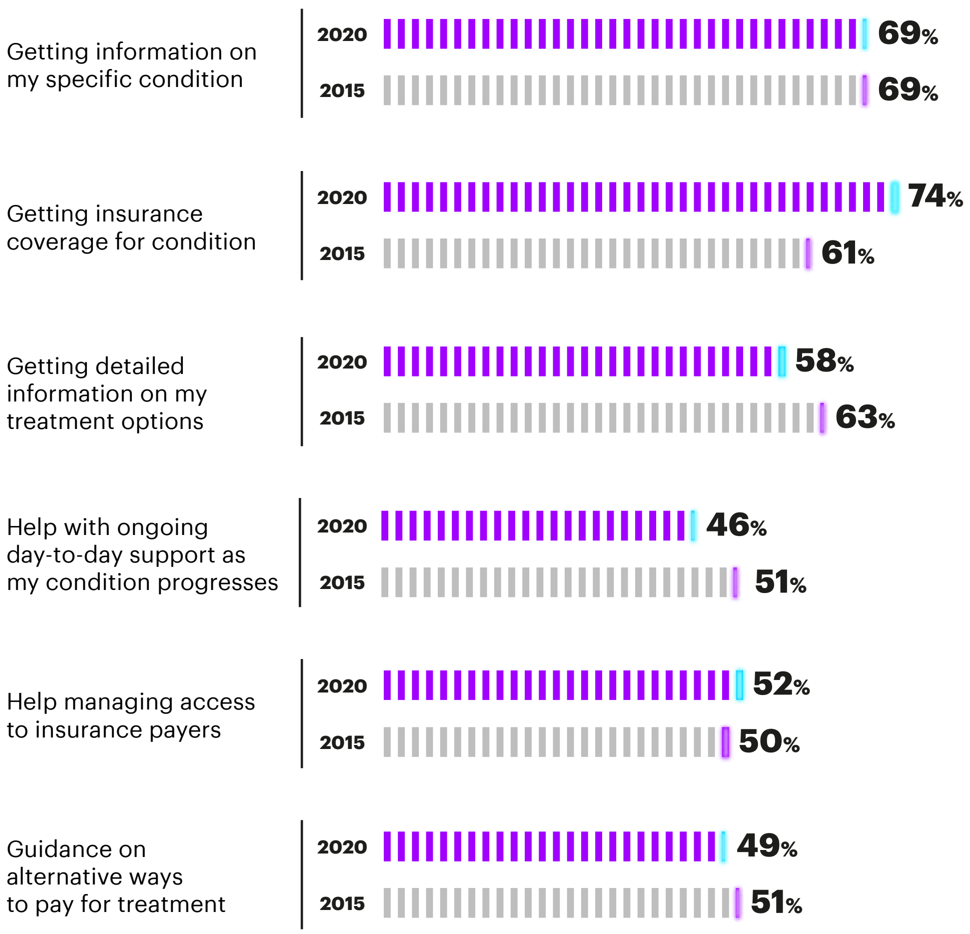
In our 2020 survey, patient awareness was highest for informational services and lowest for financial support, such as help dealing with payers and guidance on payment options (see figure 3).

Skipping the channel: Adoption by those patients aware of services also remained flat.

Between one half and three quarters of patients surveyed utilize the services they are aware of (see Figure 4). This was not an improvement in adoption levels from the survey conducted five years ago.

Usage was highest for informational services at 69% and support with insurance coverage at 74%. Receiving support with insurance coverage was the only area that showed a significant increase in adoption, rising from 61% in 2015. As a comparison, patients noted that utilization of ongoing day-to-day support as their condition progressed declined from 51% in 2015 to 46% in 2020.

Figure 4: Percent of patients who utilize services they are aware of



Keeping the headset plugged in: Patients' positive experiences have failed to deliver increased adoption or awareness.

Approximately **8 in 10 patients** surveyed rated the services they used as valuable or extremely valuable, showing that these services are providing meaningful support for the patients who participate (see Figure 5).

However, that positive experience for the patients using these services has not turned up the volume to achieve broader awareness or increased adoption.

Figure 5: Percentage of patients who say the services they've used are valuable or extremely valuable

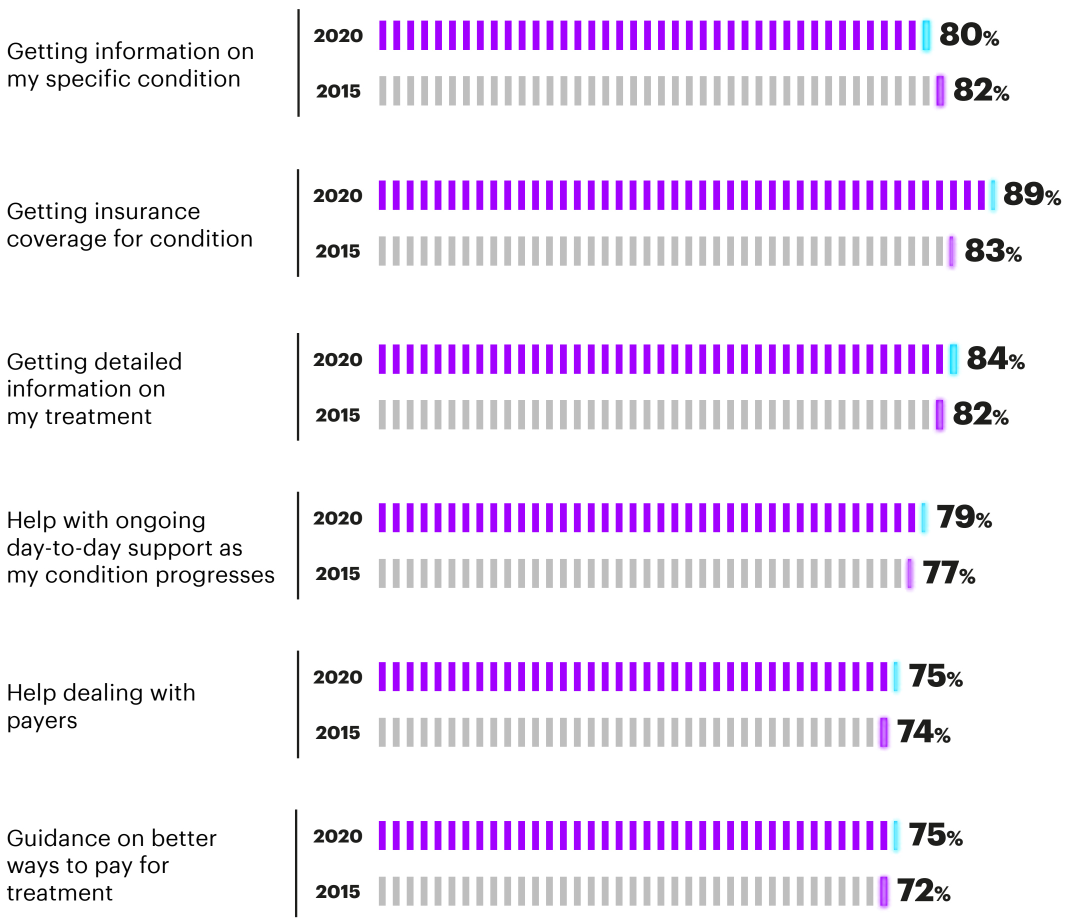
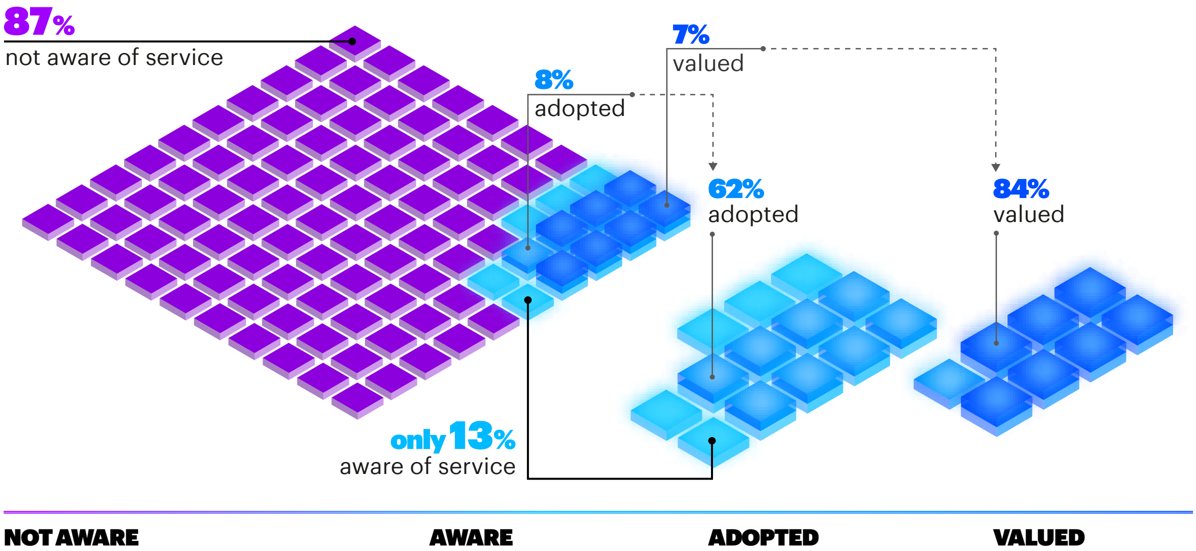
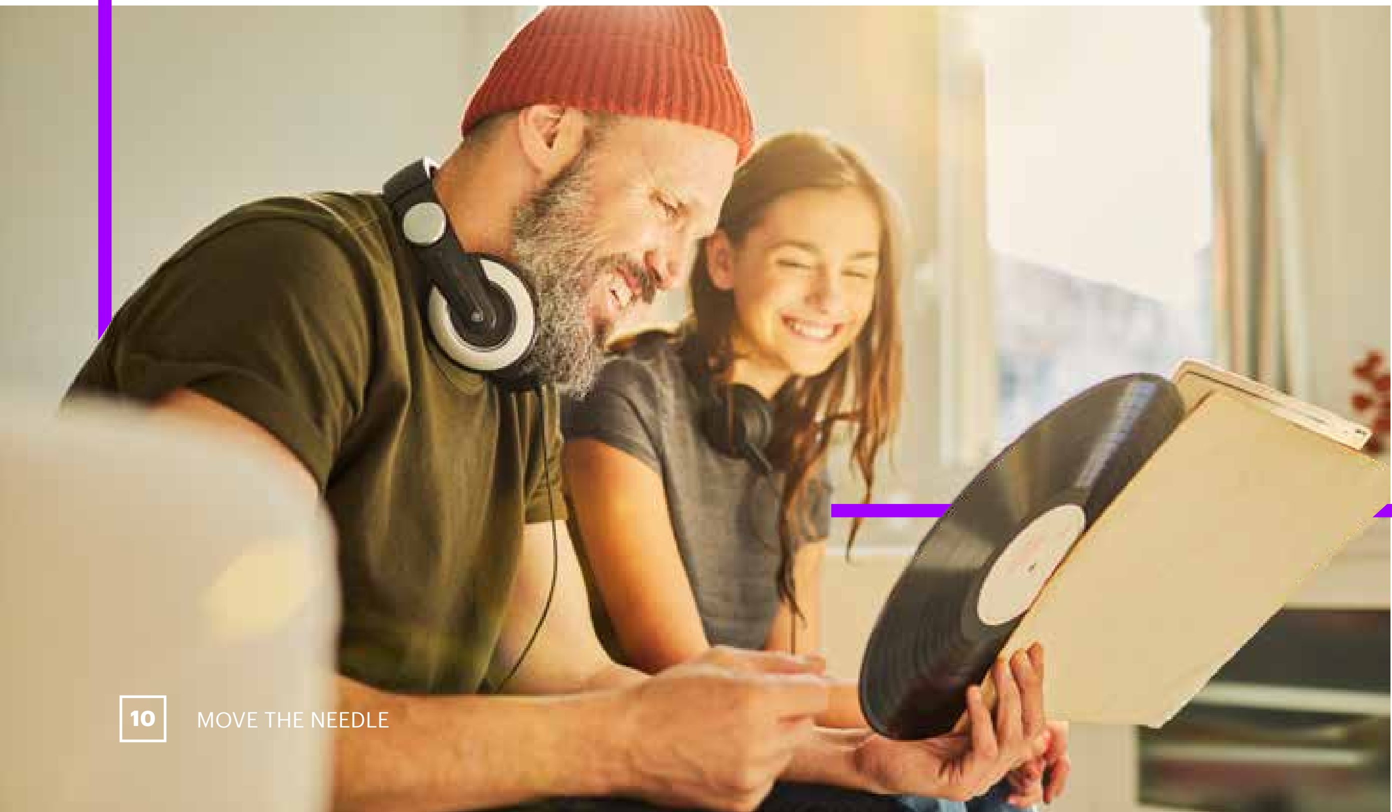


Figure 6: Rates of awareness and adoption of remote monitoring



If awareness and adoptions levels remain flat as they have for the past five years, patient services will continue to have very limited reach and impact on overall patient outcomes. For example, only 13% of patients were aware of services that help physicians engage with patients or gain access to devices that patients may be using, such as a digital diagnostics or remote monitoring. For this type of service in particular, of the 62% of patients who were aware and adopted the service, the vast majority (84%) found it valuable. However, the overall benefit to the target patient population is extremely limited, due to low awareness (in this case, 13% of all patients). These ratios hold true across the range of services we surveyed. It's clear that unless we can overcome the challenge of low awareness, we won't be able to achieve the full potential of patient services.



#2

The Need to Create Surround-Sound to Amplify the Message.

In both our 2015 and 2020 surveys, we found that the most consulted source of information by patients is their doctor, from diagnosis through treatment. It's clear that HCPs should play an essential role in informing patients about services from pharmaceutical companies that are associated with the treatments they prescribe.

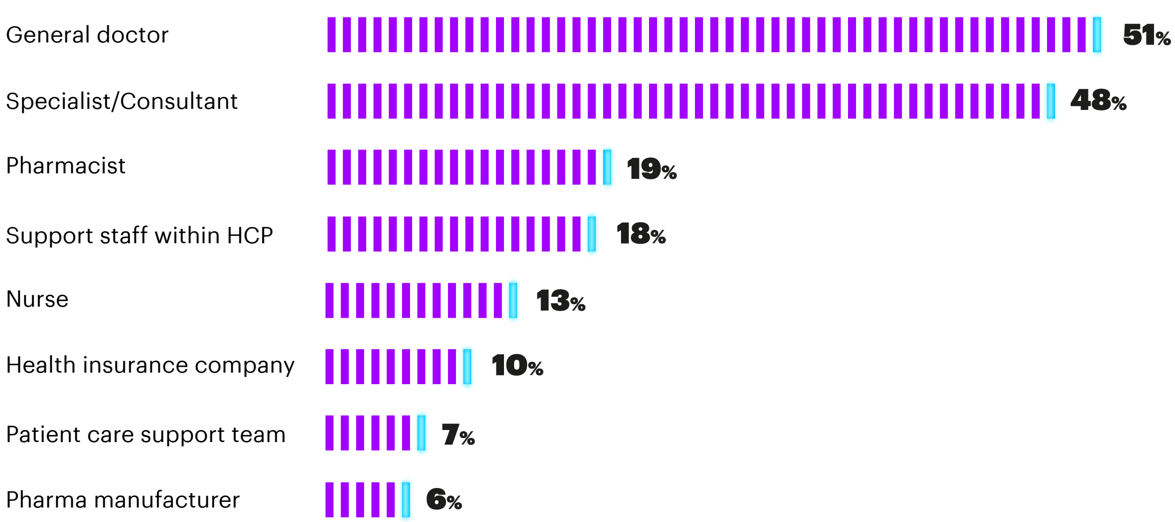
However, the time doctors spend with patients is limited. Today, they spend just 13—24 minutes with patients and their administrative hours have skyrocketed, with 70% of physicians now spending more than 10 hours every week on administration, compared to just 30% of physicians dedicating that same amount of time in 2014.[9]

While the time healthcare providers are spending with patients is decreasing, the information they need to share is increasing—from the number of approved therapies to all the services that surround them. The number of new drugs gaining approval from the U.S. Food and Drug Administration (FDA) has accelerated. From 2004 through 2013, the FDA averaged about 26 novel drug approvals per year.

From 2014 to 2019, the FDA averaged 43 approvals, ranging from a low of 22 in 2016 to a record high of 59 in 2018. In 2019, 40% of the newly approved drugs were considered first-in-class, 44% were for rare diseases, and 35% were designated as Fast Track, which speeds drug development and review.

Yet, even with the challenges they face, HCPs are identified by patients as not only the top source, but the best source of information (see Figure 7) regarding the treatments prescribed for their condition,

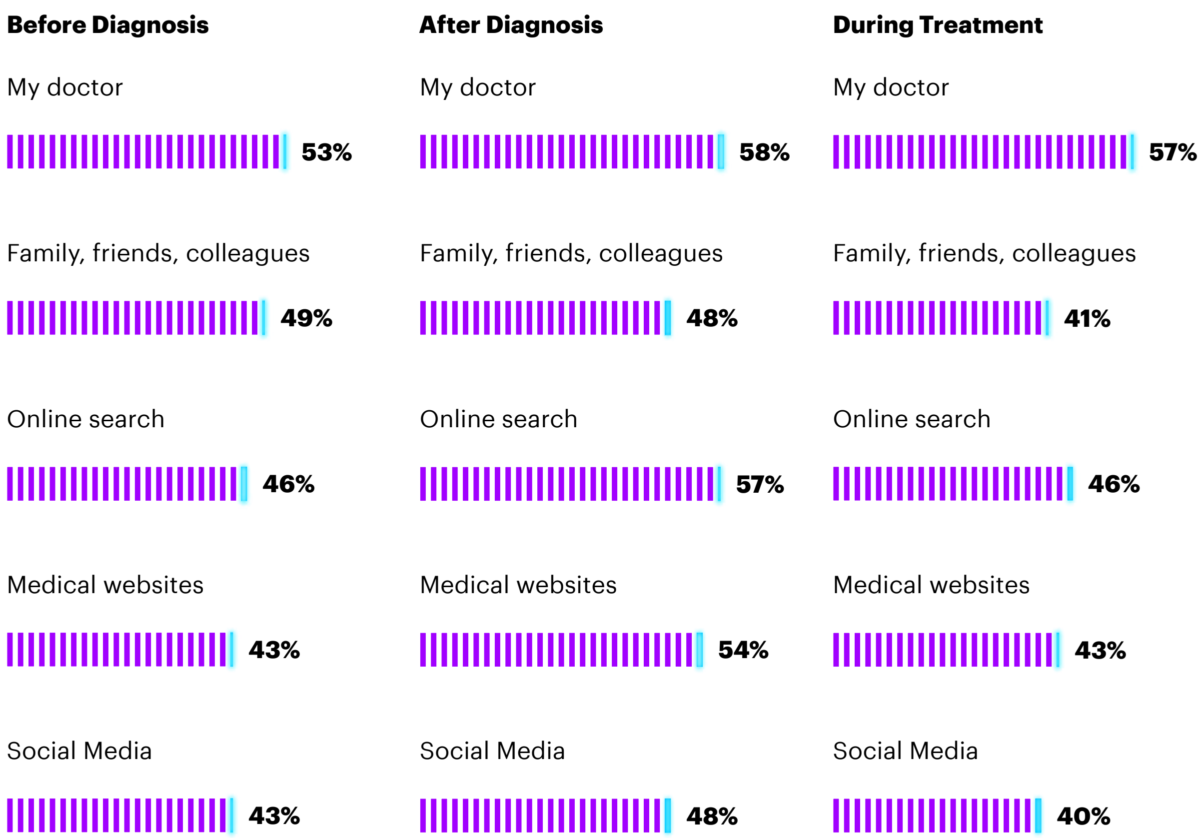
Figure 7: Percent of patients who said these sources provided the best information regarding the treatment prescribed for their condition (multiple selections allowed)



with general practitioners and specialists ranking the highest at 51% and 48% respectively. Conversely, only 6% of respondents said that pharmaceutical companies provide the best information. With the flood of information related to patient services for both new and existing therapies, it's no surprise that HCPs aren't able to break through the noise to understand and share all available options with their patients. They need to have new models that provide visibility and streamline ability to incorporate in patient treatment plans.

While HCPs may be the top information channel, complementary channels are becoming increasingly relevant in 2020. Patients are looking to other channels for the information they need. Our 2020 survey found that online search and medical websites are heavily consulted before and after diagnosis, and community support teams serve as a key information resource. During treatment, other care providers are important sources of information, such as pharmacists, caregivers, social workers, and therapists (see Figure 8).

Figure 8: 2020 Survey: Top 5 information channels used by patients before and after diagnosis and during treatment



These groups and online resources are beginning to play a more significant role in communicating with patients about the services available to them. In fact, our 2020 survey revealed an increased use of online resources for patients in the treatment phase, including use of pharma company websites up from 36% to 44% and social media from 33% to 40%.

Pharma companies should examine ways to help HCPs cut through the noise by providing concise, evidence-based information that they can confidently pass along to patients.

The increased use of online resources found in our survey also underscores the importance of developing multi-channel communications programs to ensure that patients are surrounded with clear, easy-to-understand information about the services available to understand their condition, better manage their care, or access financial assistance.

Figure 9: Top sources consulted by patients during treatment

	2015		2020
My doctor	56%	↑	57%
Community support groups	45%	↑	51%
Pharma company websites	36%	↑	44%
Social Media	33%	↑	40%

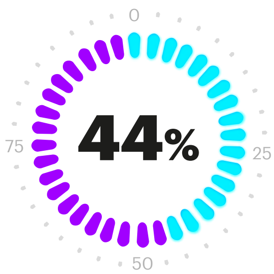
#3

Patients are ready to receive information and care via new channels.

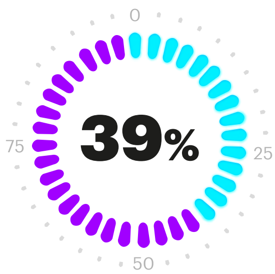
The impact of the COVID-19 pandemic on the life sciences and healthcare industries has been dramatic, from the slowdown in clinical trials to disruptions in care. One clear change has been the increase in patient adoption of digital technologies to manage their healthcare.

During the pandemic, patients began using digital technologies in new ways to receive care, access information, and were even empowered to do more to manage their conditions themselves. Nearly half of patients started using new devices or apps to help manage their conditions during this time—and they want to continue using this technology even after the pandemic is over (see Figure 10).

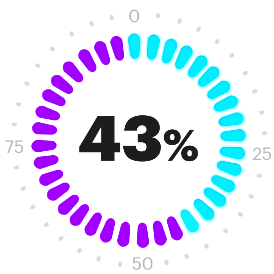
Figure 10: Patients heightened use of digital tools during COVID-19



44% of patients have had more virtual conversations with HCPs and 37% have used telemedicine more since COVID-19



39% of patients have found far more ways to get information and help during the crisis

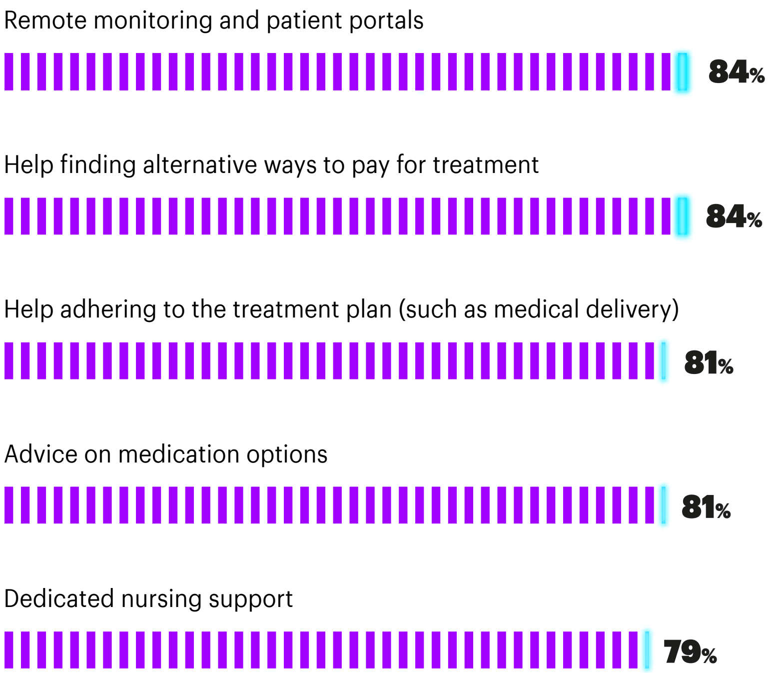


43% of patients said the crisis has proven to them that they can do a lot more to manage their condition themselves[10]

When asked about the use of patient services during the pandemic, 84% of patients said that the services they used—such as remote monitoring and payment support—were valuable or extremely valuable (see Figure 11). It's not a surprise that those who are using patient services recognize the value. However, it's the increased openness to the use of technology in the management and delivery of care that has arisen during COVID-19 that could be a game-changer for patient services.

As already noted, the biggest barrier remains low patient awareness of available digital services, with only 13% of patients aware of services such as remote monitoring and patient portals. Today, with patients and HCPs more willing than ever to leverage technology for healthcare, pharma companies must rapidly deliver the information and services needed to help drive what could be a significant increase in not just awareness but use of patient services.

Figure 11: Patient use of services during pandemic—ranked as valuable or extremely valuable



A modern, service-oriented model for patient services

The patient services model needs to be fine-tuned in order to help more patients and deliver the intended impact.

With the current model of engagement at its limit, an evolution to a model that is service-oriented and outcomes-oriented is necessary in order to realize patient impact in line with the investment being made. Fundamental changes are needed to see real improvements in awareness and adoption. Pharma companies must make it simple and seamless to learn about and access services, both for patients and HCPs.

Design patient services for value and demonstrate that value to HCPs to support their care decisions. Build patient services as a structural element of holistic care that improves patient outcomes, rather than as an occasional safety net.

Cut through the noise and simplify service choice with coordinated delivery and an integrated service model—all with the patient at the core. Present services as cohesive, end-to-end programs rather than independent solutions. Seek portfolio synergies to create efficiency, with unified services for specific therapeutic areas.

Create surround sound. Deliver clear and consistent messages through relevant channels that explain the services and value of using them, including the evidence of outcomes. Incorporate information channels that augment the HCP's role and partner with payers, pharmacies, and others in the healthcare ecosystem to meet patients where they are and become a part of their daily routine.

Harmonize with HCP workflows and patient lifestyles. Communicate via technologies already in use, like EMRs and smartphones, to make awareness and adoption of patient services easier and more convenient. Collaborate with not just doctors, but other HCPs who influence patient care, as well as community and patient organizations.

Ensure you have the right hits for the moment. Modernize modes of communication and care. Capitalize on the digital shift accelerated by COVID-19.

Take advantage of the heightened interest in the use of technology, and ability to use data to personalize services, to power hyper-relevant digitally enabled patient services.

Patient services are essential to delivering care that improves health and economic outcomes. In order to realize this goal, patients need to know about and use the services available to them. Pharmaceutical companies can play a key role in this by designing services that fit into HCP's and patients' daily lives, measuring and communicating the value of patient services, making these services easy to understand and access, and using new technologies to deliver these services.

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