

The Industry Insider Series: Pharma, Healthcare and Service Innovation

*An independent survey covering service innovation and
healthcare collaboration within pharmaceutical companies.*

Introduction

From May through to July 2010, psHEALTH ran an online survey with leading pharmaceutical companies to look at their views on service innovation and healthcare collaboration.

Given budgetary constraints and recent government sponsored initiatives such as QIPP (quality, innovation, productivity and prevention) , psHEALTH was interested in learning how the Pharmaceutical Industry views their role within healthcare provision.

Survey size:

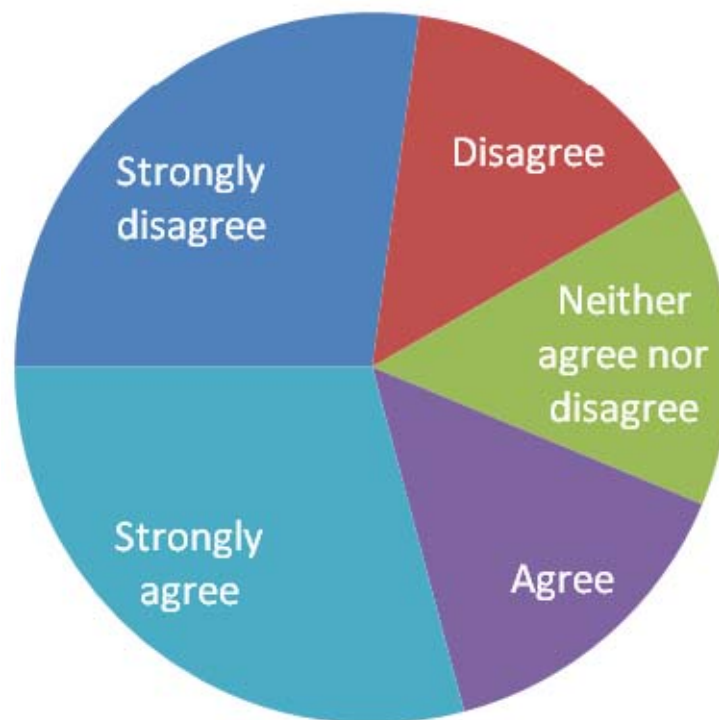
100 senior leaders were contacted from over 40 of the UK's top pharmaceutical companies. This survey covers the views and insights from 22 leading companies that participated in our survey.

Executive summary

- Most pharma companies now offer healthcare services as an extension of their drug business
- Primary motivation for healthcare services to defend existing revenue stream as opposed to creating new ones
- Drug adherence is the most common service offering; risk sharing and service redesign is also high on agenda
- Pharma investment in the healthcare services is set to increase further, starting with drug compliance programs
- Pharma are best placed to run these programs; however home healthcare providers also play an important role
- While there is a lot of enthusiasm, proving value of these services has been more difficult
- Lack of coordination among key stakeholders remains the biggest hindrance for the programs' success
- Even within the company, coordinating service delivery across departmental boundaries is a problem ...
- ... Hence pharma is increasingly delivering these services via online workflow systems to keep stakeholders involved and standardize operations in order to measure outcomes and prove value

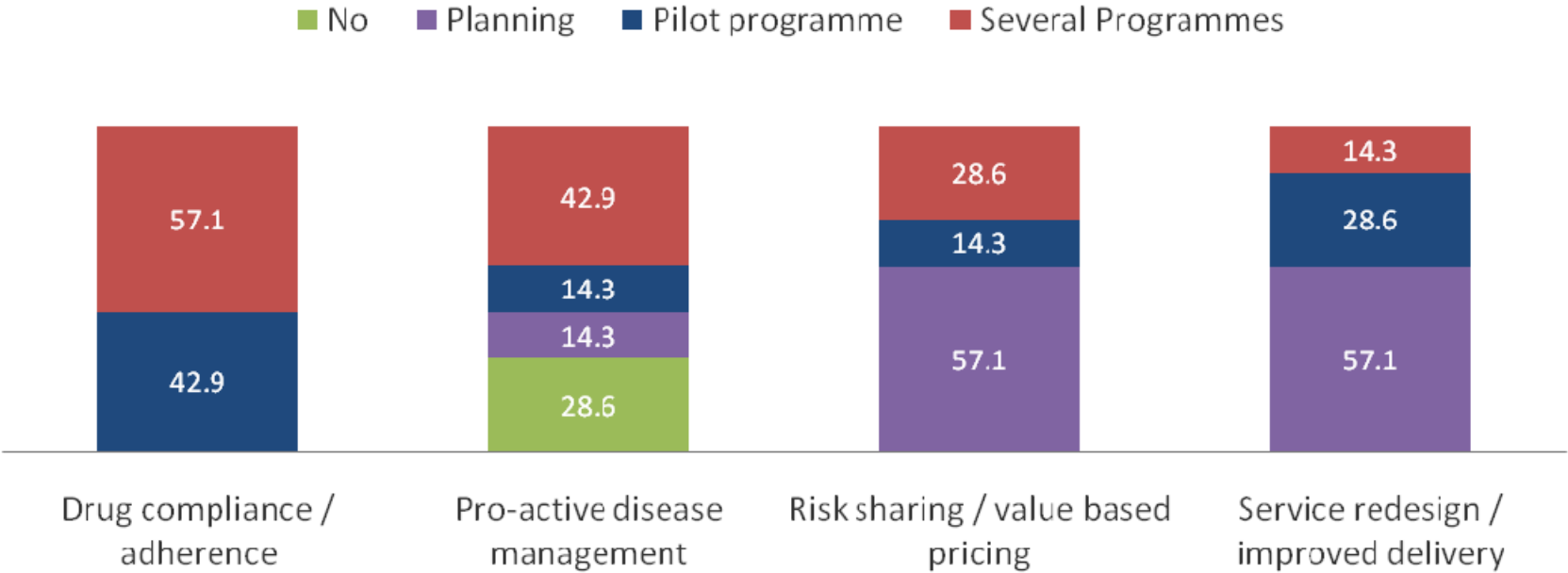
Most pharma companies now offer healthcare services as an extension of their drug business

Has your company moved from selling drugs to providing them in combination with services to improve outcomes?



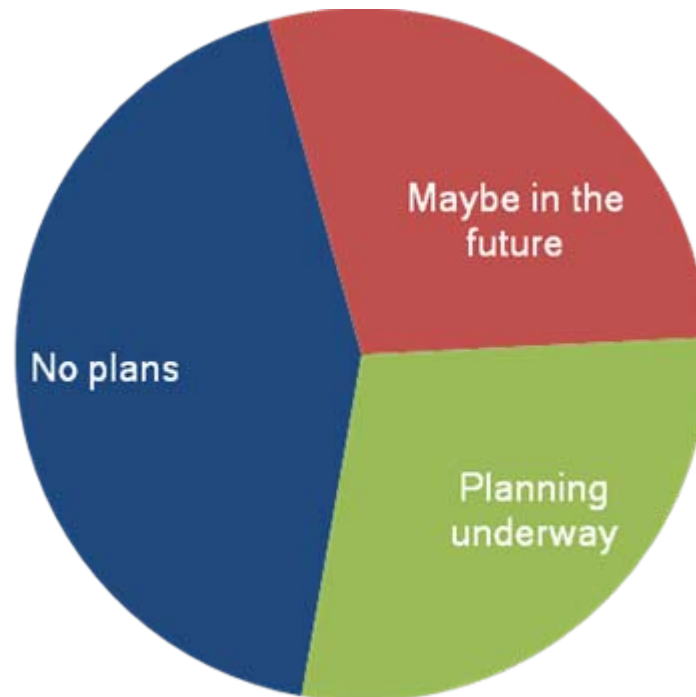
Drug adherence is the most common service offering; risk sharing and service redesign is also high on agenda

What type of programmes do you offer? (% of respondents)



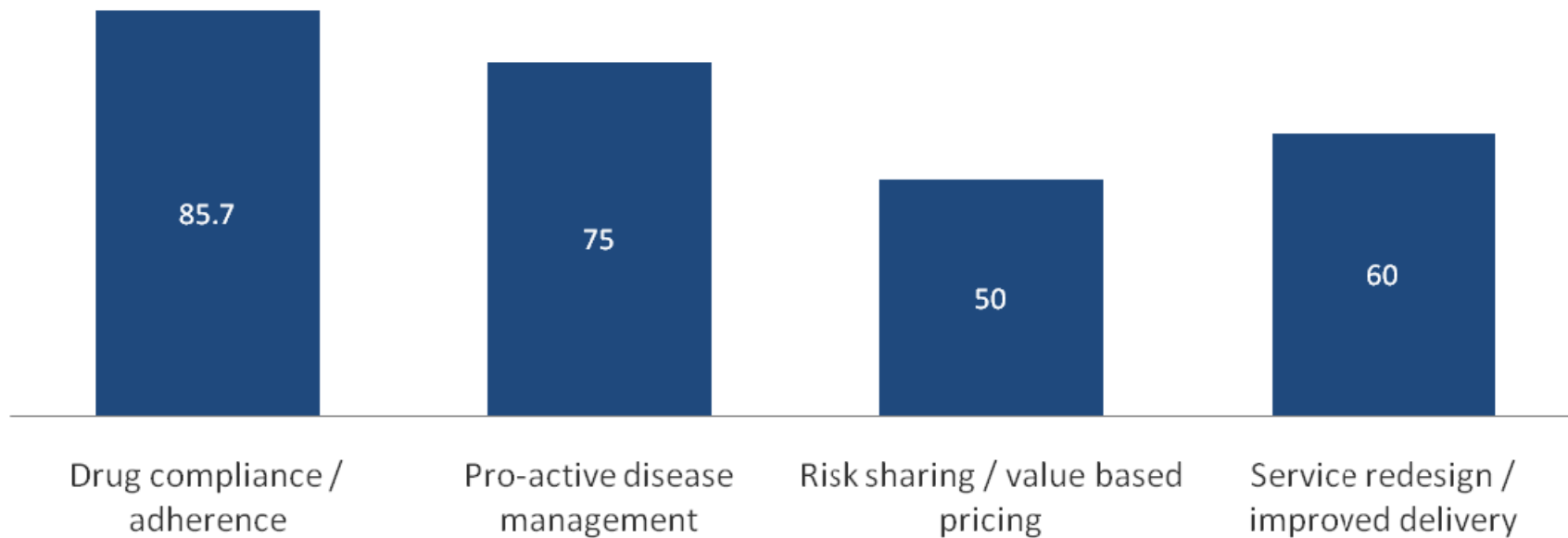
Primary motivation for healthcare services to defend existing revenue stream as opposed to creating new ones

Does your company have plans to use healthcare services as a source for non-drug revenue?



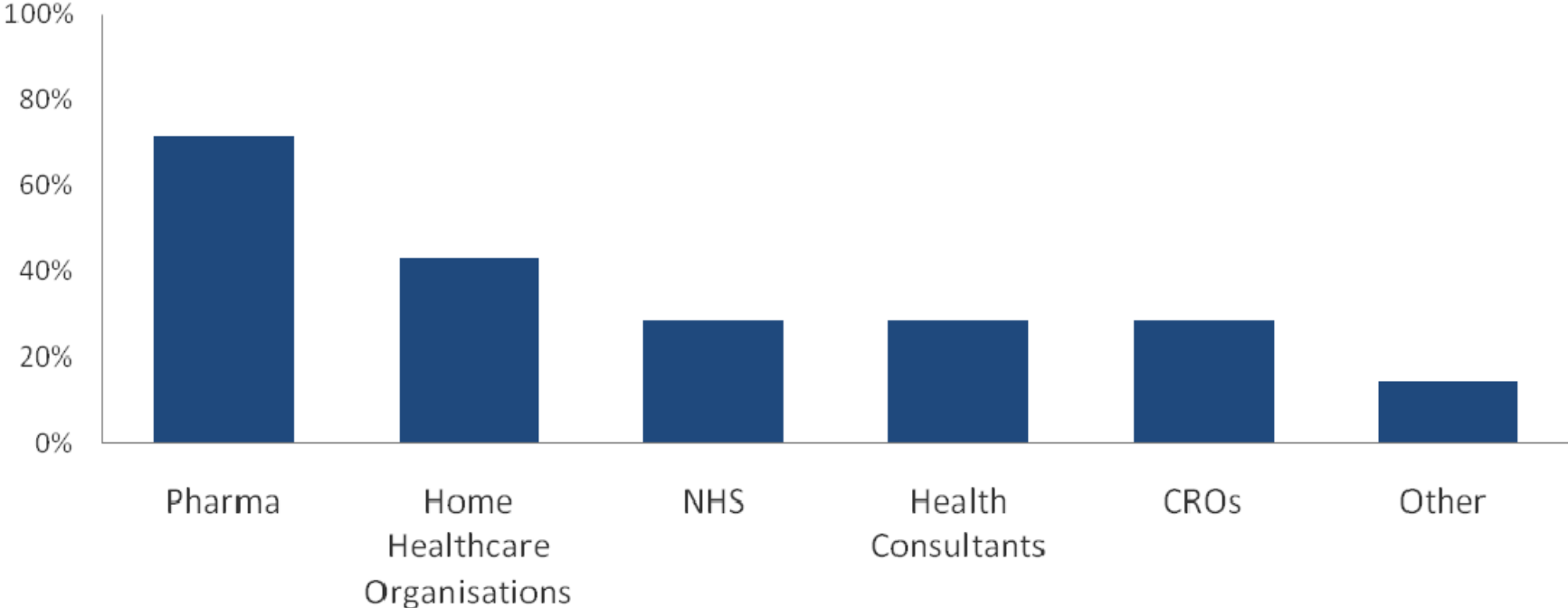
Pharma investment in the healthcare services is set to increase further, starting with drug compliance programs

Do you plan to increase investment in the following services?
(% agree)



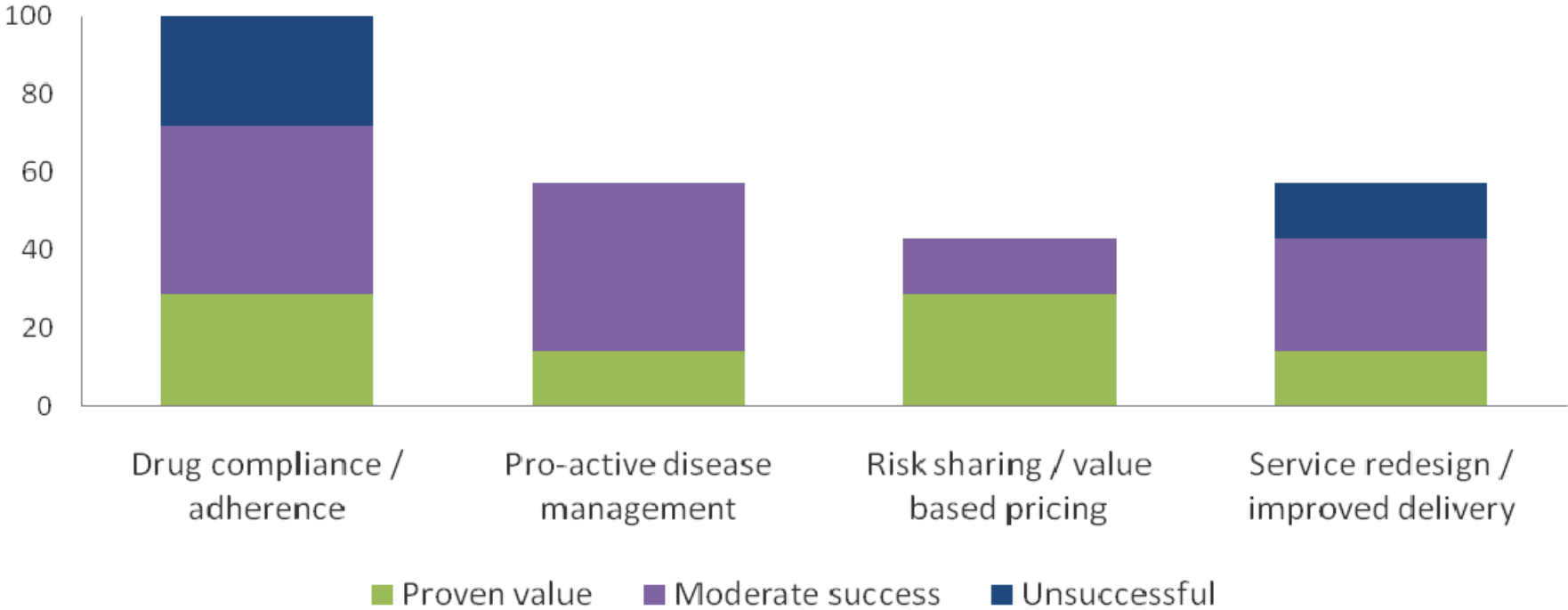
Pharma are best placed to run these programmes; however home healthcare providers also play an important role

Who do you think is best placed to run these programmes?



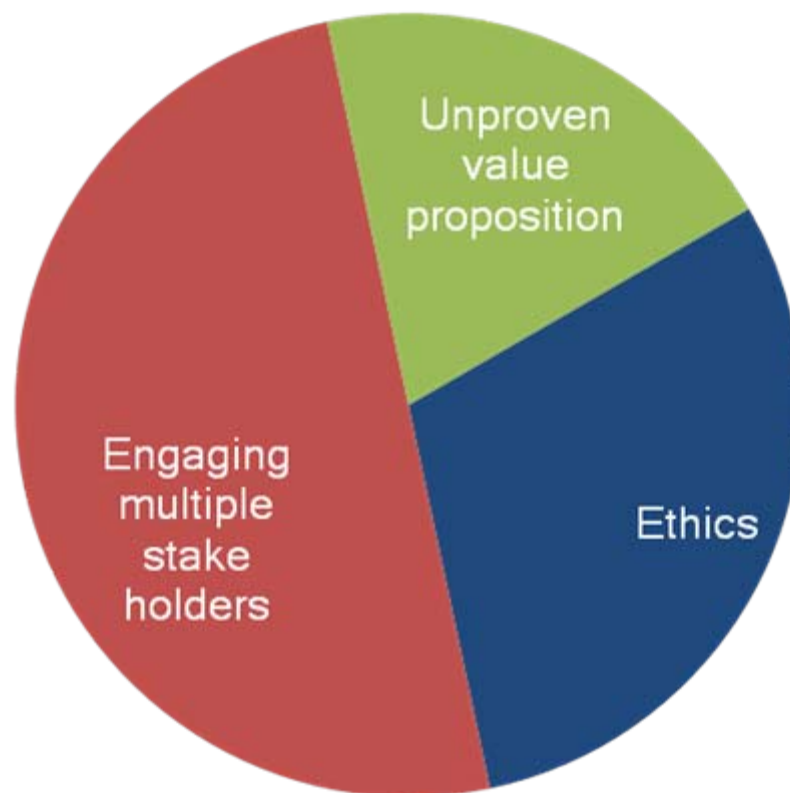
While there is a lot of enthusiasm, proving value of these services has been more difficult

How are the programs performing?



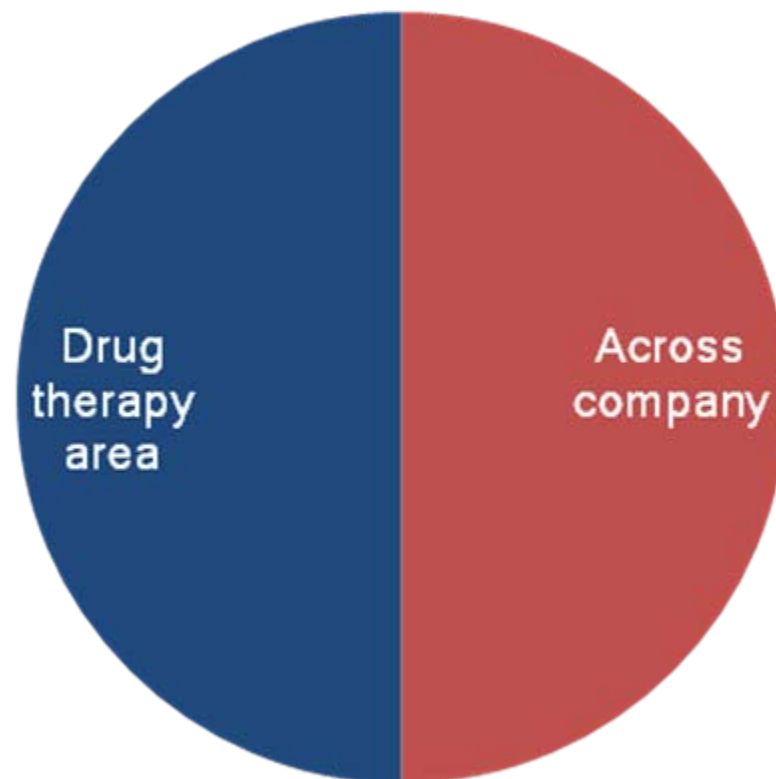
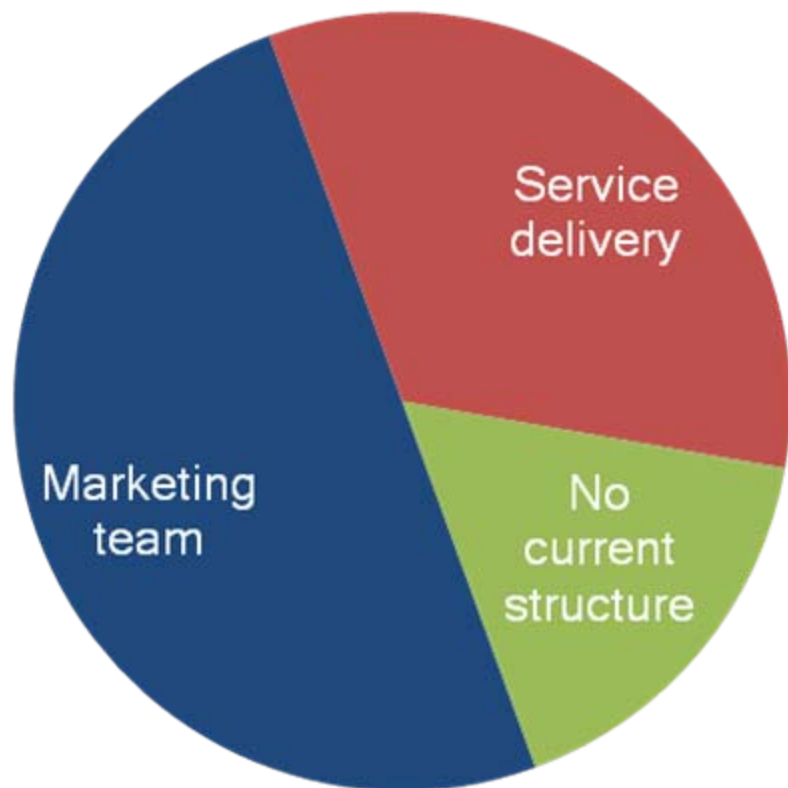
Lack of coordination among key stakeholders remains the biggest hindrance for the programs' success

What is the greatest barrier to launching and success of new services?



Even within the company, coordinating service delivery across departmental boundaries is a problem ...

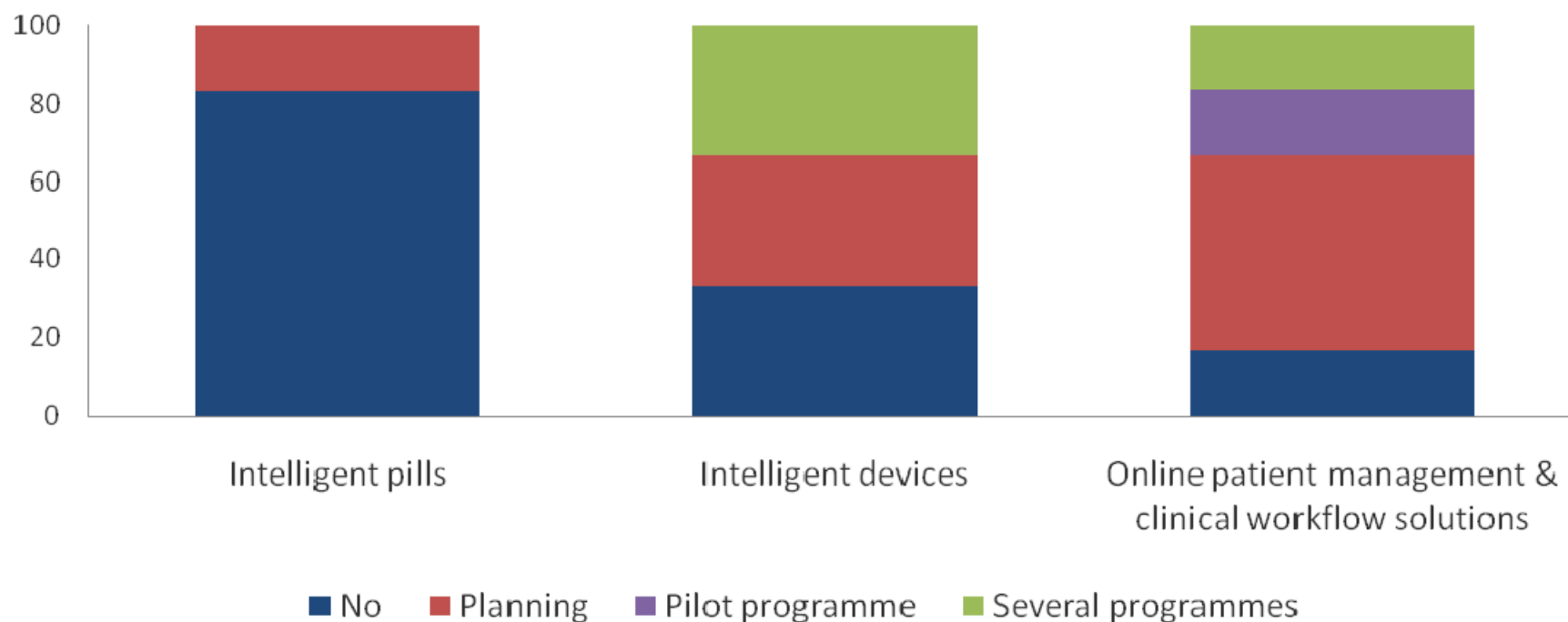
Where does service innovation and delivery sit within your organisation



... Hence pharma is engaging online workflow systems to keep stakeholders involved and standardize delivery to measure outcomes

Are you engaging the following new technologies in developing personalised medicine programmes?

(%)



Key Quotes

“...for us it is all about who owns the patient. To deliver better health outcomes you have to get closer to the patients. The journey starts with the prescription...”

Growth Director of a leading global pharmaceutical company

“...Our organisation is committed to providing service innovation within healthcare. We have recently gone through a restructuring to ensure we have the capabilities to deliver across the company, not just within a therapy area...”

Innovations Team Leader of a leading pharmaceutical company

“...Key to the programme’s success is our ability to engage with the patient and provide outcome data to all our stakeholders. We are committed to delivering service innovation, but we also want to spend our money wisely. Technology will play a crucial role in the personalisation of care delivery...”

Service Delivery Director of a leading pharmaceutical company

This survey was commissioned by psHealth, a leading provider of customised patient management and clinical workflow software to healthcare service providers in the UK and abroad.

psHealth
35 New Broad Street
London EC2M 1NH
0845 50 50 120

www.pshealth.co.uk

If you would like to discuss the survey results in more detail, please contact:
mindy.daeschner@pshealth.co.uk