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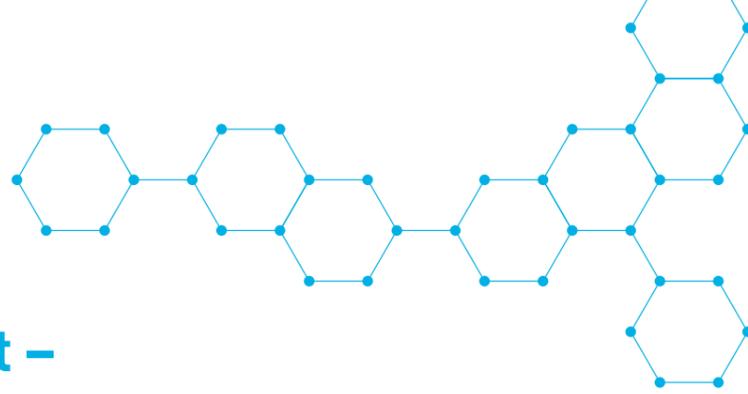
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Digital Patient Engagement

Insights for the Pharmaceutical Industry

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Digital Patient Engagement – To what extent is digitization impacting the relationship between patients and pharma companies?

The pharmaceutical industry is being pressured to change. With empowered patients and new players entering the market, traditional stakeholders are being challenged, calling for new business models and a revised market equilibrium.

The FDA (Food and Drug Administration) and the European Medicine Agency are taking patients' opinions increasingly into account during drug development and regulatory approvals. The French authority HAS (Haute Autorité de Santé) consults with patient advocacy groups when assessing drugs. Online communities such as Patients Like Me are playing more important roles in product adoption.

Being able to provide services during the whole patient journey and capturing patient generated health data to gain insights are key to pharmaceutical companies' market access. They also play an important part in developing patient centric medical and marketing strategies.

Capgemini Invent and IMD Business School research shows that there are many opportunities for pharmaceutical companies to create value in the healthcare ecosystem and leverage digital patient engagement to improve treatment outcome for patients. Digital patient engagement will play a major role in the future of healthcare.

According to the 2017 Capgemini Invent Digital Life Science Market Web Watch, 60 % of initiatives launched by pharmaceutical companies in 2017 focused on patient experiences and 35% on digital R&D.

Digital patient engagement is defined as an information flow between a patient and a pharmaceutical company mediated directly or indirectly by digital technologies.

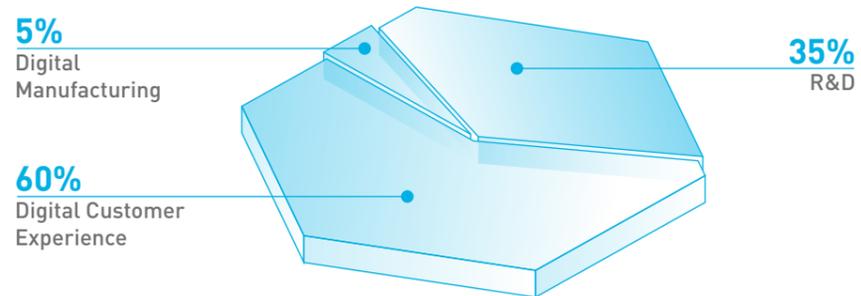
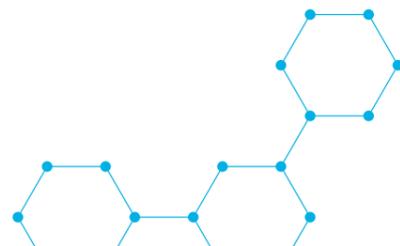


Figure 1: Focus areas of digital initiatives in the life sciences industry

Source: Capgemini Invent Digital Life Science Market Web Watch, 2017



Digital Patient Engagement is here to stay

However, according to IMD research only 20% of pharmaceutical executives consider digital disruption to be a threat today.

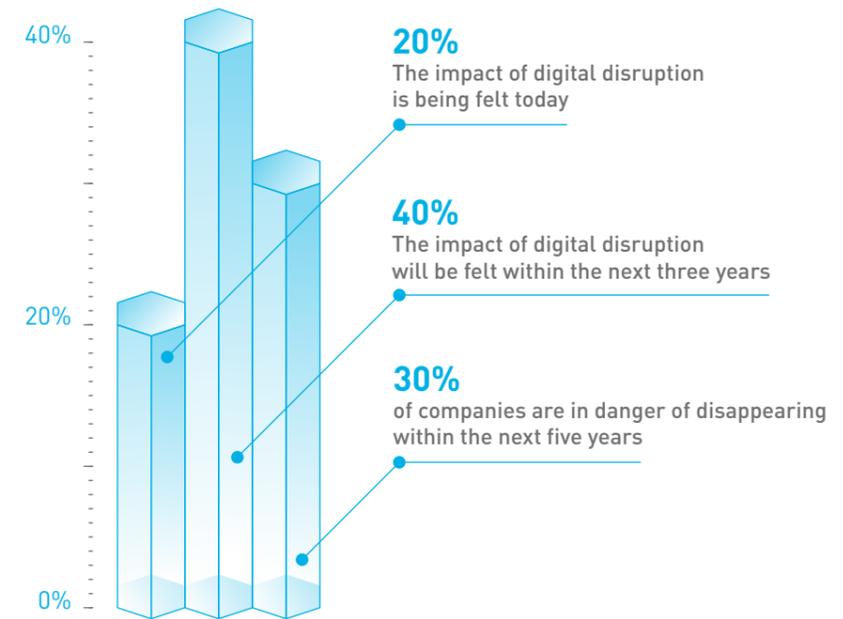


Figure 2: Impact of digital disruption on the pharmaceutical industry

Source: Global Center for Digital Business Transformation, 2017

IMD research also reveals that most pharmaceutical companies are not prepared for the coming changes.

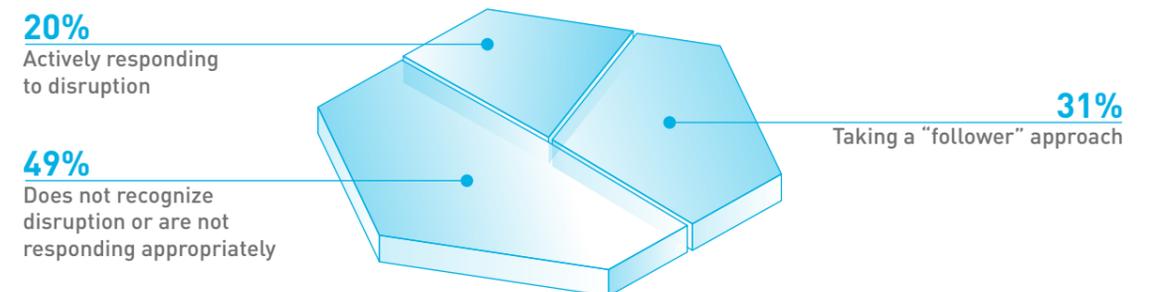


Figure 3: Leadership attitudes towards digital disruption

Source: Global Center for Digital Business Transformation, 2017

Companies are using digital tools to add value for patients, but not all take full advantage of the new opportunities that digital offers

Based on interviews with executives, we identified six types of digital patient engagement initiatives. Digital tools are often used to do what is already being done by other means for marketing, patient education, treatment adherence and clinical trial initiatives.

The following are examples of the most common initiatives employed by pharmaceutical companies:

Type 1 and 2: Brand Awareness and education

A pharmaceutical company sponsors a professional cycling team composed by cyclist with diabetes to raise awareness about diabetes on social media (inspired by Novo Nordisk).

Type 3 and 4: Patient monitoring and real-world evidence

A pharmaceutical company uses a device to detect pulmonary pressure. The data is sent automatically to the healthcare provider, who can intervene before the patient feels any adverse symptoms.

These initiatives add value, but do not take full advantage of the capabilities that digital technologies can provide.

Digital capabilities can be leveraged to create new opportunities and new business models. Our interviewees mentioned informed decision making and a holistic approach to disease as the most likely and most innovative future digital patient engagement initiatives. Our research shows that only a few pharmaceutical companies have focused on these types of initiatives. By contrast, they have become the focus of technology companies, start-ups and new style patient advocacy groups.

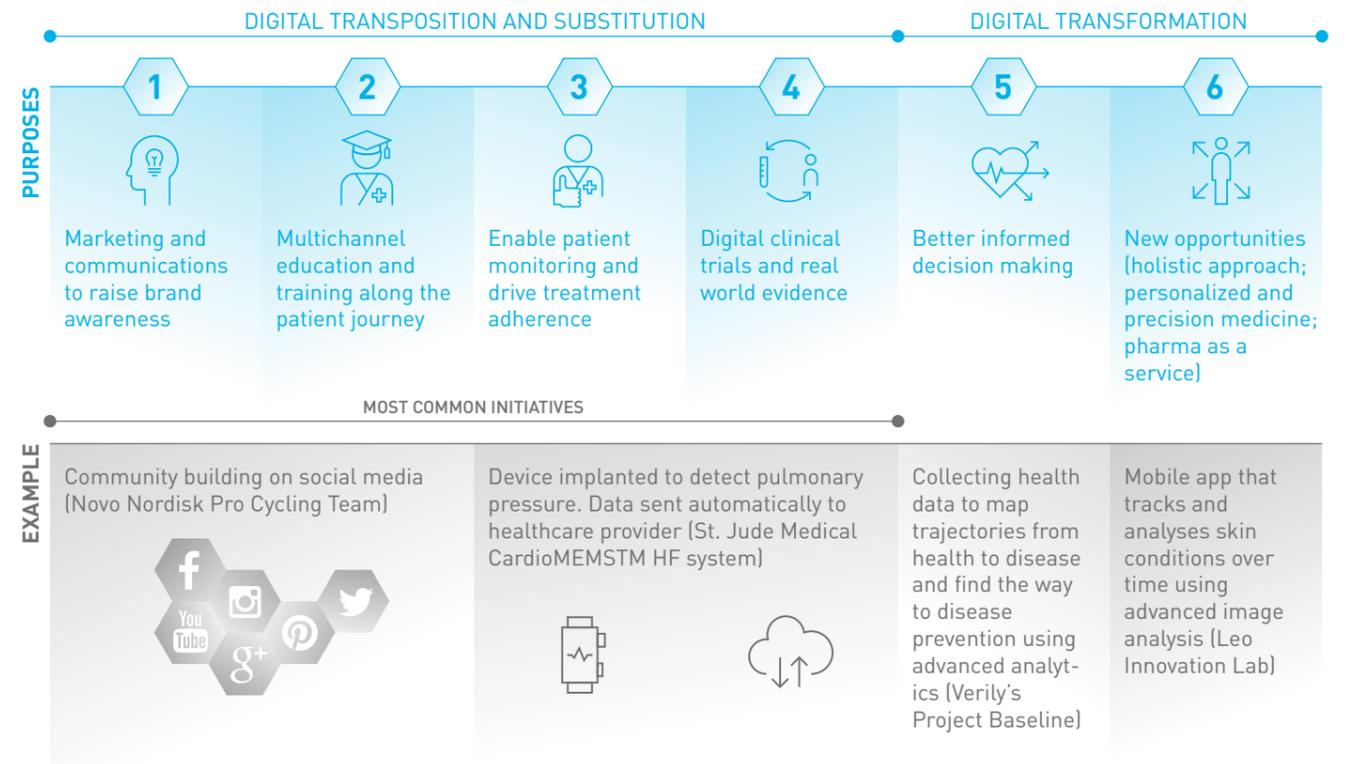
Type 5: Improved decision-making

In April 2017, Verily launched Project Baseline, with the aim to collect health data from 10,000 people over 4 years to study health and disease in more depth than ever before. The data collected will be used to map trajectories from health to disease and find the way to disease prevention.

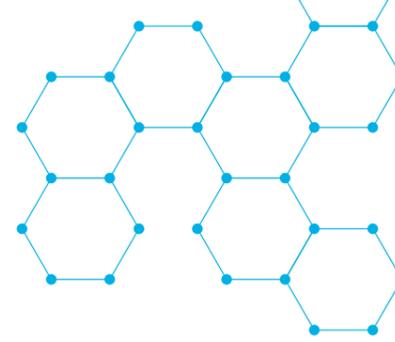
Type 6: New Opportunities

LEO Innovation Lab has launched several mobile applications for people living with various skin conditions. One example is Imagine, a mobile app that tracks and analyses skin conditions over time using advanced image analysis. The aim of the app is to support patients and healthcare professionals in more easily identifying triggers and providing the right treatment more quickly.

Figure 4: Digital Patient Engagement Initiatives, Purposes and Examples

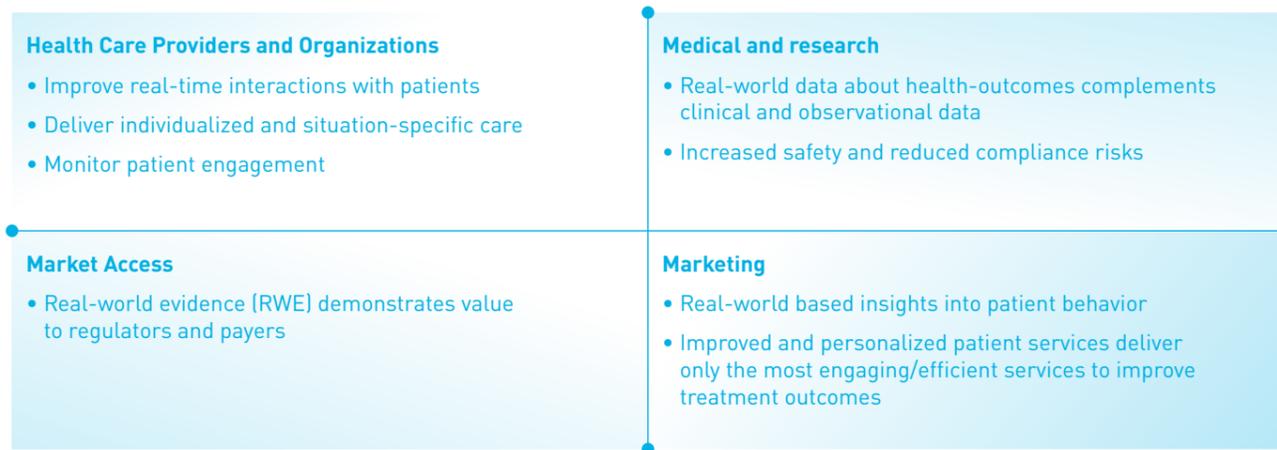


In the future, digital patient engagement can lead to new opportunities and improved treatment outcomes for patients



Other healthcare stakeholder groups can also benefit from digital patient engagement initiatives

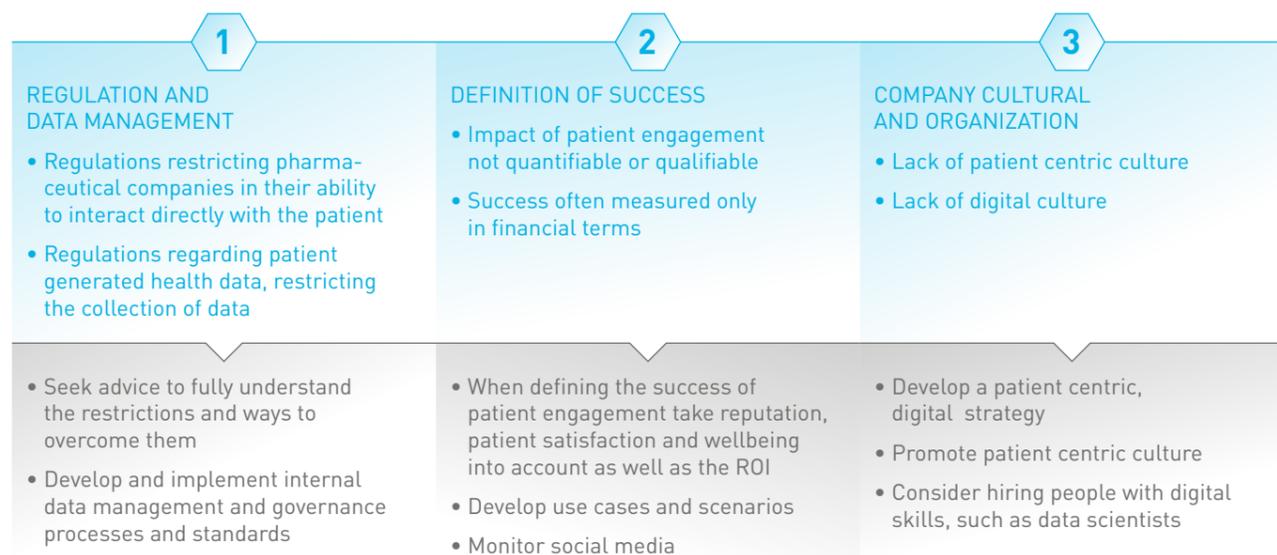
Figure 5: Benefits of digital patient engagement



Capgemini Invent and IMD research also shows that there are challenges that pharmaceutical companies must overcome if they want to engage digitally with patients. It is essential for pharmaceutical companies to establish a digital and patient-centric culture. The following figure highlights the most frequently encountered barriers and ways to overcome them.

Stakeholders will benefit from analyzing patient generated health data so as to optimize patient treatment and services and offer a seamless patient journey.

Figure 6: Frequently mentioned barriers and how to overcome them



Collaborating with external experts, developing cross-functional, cross-departmental working groups and implementing a patient-centric strategy are some ways to overcome highly siloed organizational structures that inhibit a patient-focused approach. Once the challenges are resolved, pharmaceutical companies can bring additional value to the healthcare ecosystem and help define the future. It is clear that digital patient engagement will be an integral part of the patient journey going forward and has the potential to contribute to improved patient wellbeing and personalized treatment.

Research Methodology

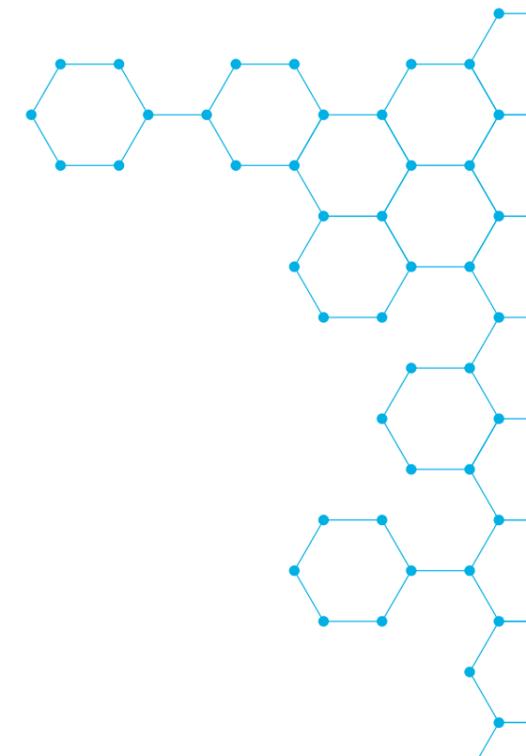
30 interviews were conducted between September 2017 and January 2018. 79% of the respondents came from the pharmaceutical industry and 21% were technology partners and services providers of the healthcare industry. Interviewees represented companies in Belgium, Denmark, Germany, France, Switzerland, the U.K. and the U.S.

Secondary research was drawn from IMD Business School and Capgemini Invent whitepapers, professional pharmaceutical publications, academic journals, and specialized websites.

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