

Adherence – What Do Pharma Really Know

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Abstracts

Adherence – What Do Pharma Really Know

The entire industry is talking about patient centricity but are the right steps being taken to address the most fundamental patient issue: non-adherence? Is ‘big brother’ technology the answer? Perhaps education is the key? What can be done to ensure patients take drugs as they are intended to be taken and reap the benefits accordingly?

Adherence: What do pharma really know? explores the main issues including physician impact, the variety of factors leading to non-adherence, and the potential solutions and pitfalls. Find out what leading industry experts say, not only about the important issues but also about the crucial actions and strategies that lead to success.

Discover on this page

The executive summary below, taken directly from the report, presents key findings from the research

The rigorous research objectives and methodologies employed to produce the report

Detailed report contents

Why this report is important to you

Executive Summary

In the context of pharmaceuticals, patient adherence is a metric that can best be

defined as the way in which patients take their medications as prescribed by a physician. For example, good patient adherence includes taking the correct dosage of a medication for the full duration of treatment.

Non-adherence, whereby a patient fails to take their medication as recommended or prescribed, can have a significant impact on patient outcomes. It also has a considerable financial cost to both the pharmaceutical companies, who lose revenue if patients do not persist with their medication, and the healthcare system, which bears the cost of the consequences of non-adherence, such as hospitalisations and additional medical interventions. Further, physicians may be negatively impacted as the non-adherence can be perceived as a patient not responding to therapy in the way they expect, which can in turn affect the physician's confidence in a medication, as well as physicians being required to provide additional management of non-responsive patients.

Pharmaceutical companies have invested significant time and resource into understanding reasons for non-adherence, patient and healthcare provider education and support programmes to promote consistent adherence. These have met with varied success – for those patients who are non-intentionally non-adherent, support programmes and reminder services can be very beneficial as they address the core reason for this non-adherence; forgetting to take their medication as intended. In contrast, simple reminders and support programmes do not have the same impact for patients who are intentionally non-adherent, actively deciding not to take their medication due to a range of factors including fear of side effects, affordability issues, lack of education about the drug and the complexity of the regimen. Instead, adherence interventions are more focused on changing behaviour, through education programmes or, increasingly, through interactive technology that allows healthcare providers and carers to monitor the patients' adherence and proactively take steps to address failure to take their medication.

As adherence support offerings have become more sophisticated, through the use of advanced technology, tailored adherence support is becoming more common with pharmaceutical companies increasingly offering individualised experiences that appeal to each different customer. Technology such as wearables and smartphones have closed the loop in providing feedback on how patients are taking their medication and, in addition to enabling healthcare providers to be proactive in managing their patients' health, these technologies provide pharmaceutical companies with an invaluable source of robust data. Indeed, some companies are collecting outcomes data in this way and using this information to show how a particular product would deliver greater benefits to patients, physicians and payers compared to competitor drugs.

This report will examine the growing importance of adherence to pharmaceutical companies and the strategies that are being implemented to address the drivers of non-adherence amongst patients. It will assess the different factors that contribute to non-adherence, the activities that pharmaceutical companies are undertaking to tackle non-adherence and how these are expected to evolve with the growing use of technology. The report will also provide insight into the way in which companies' design and implement adherence support programmes and how the creation of specific patient solutions teams is impacting on adherence strategies.

Research Methodology and Objectives

This report provides insight into the evolving area of adherence in the context of patient-centricity and added value strategies. It also offers guidance on how to steer your adherence strategies towards successful results.

Analysis is based on in depth interviews with seven senior experts, each of whom have extensive experience of adherence and patient programmes.

Git Patel, CEO Sargas Pharmaceutical Adherence & Compliance (SPAC)
International

Soren E Skovlund, Senior Researcher, People Centered HealthCare and Lead on Patient Reported Outcomes, Faculty of Health Sciences, Aalborg University.
Chief Patient Officer at DrugStars Inc

Sinead Tuite, Patient Programmes Manager, MSD

Jason DeGoes, Head of Global Patient Solutions Team at Teva
Pharmaceuticals

Marketing Head, Global Vaccines Company

Former Global Patient Adherence Lead at Novartis Pharmaceuticals

Director, Global Patient Solutions Lead

Key questions explored in this report include

What is the latest thinking regarding intentional and unintentional non-adherence?

What are the range of factors leading to non-adherence?

Why is adherence so important to all stakeholders and what is its impact?

What more can be done to support patient and physician education as a route to addressing non-adherence?

What should a successful adherence programme look like? What specific elements are crucial?

Is technology the key to success? How can technological developments be better utilised to address non-adherence?

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There is a considerable commercial impact of non-adherence

Non-adherence has a significant financial cost

The level of adherence can vary across patient populations

The treatment goal exerts an impact on adherence

A range of factors lead to non-adherence

Physicians have a critical role to play in patient adherence

Non-intentional non-adherence tends to be an area that pharmaceutical companies focus on

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Support programmes are the mainstay of adherence strategies

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Internal challenges can limit a company's commitment to addressing adherence

Pharmaceutical companies are starting to focus resource on adherence

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Why this report is important to you

As part of the package of change underway across the industry, adherence has an important role to play. We're experiencing multiple developments including intense downward cost pressure, the push towards patient centricity, greater demand for added value, rapidly evolving technologies and the quest for evidence based outcomes. With this backdrop, the evolution of effective, results-oriented adherence programmes is a logical and inevitable development – but we're not there yet.

Physicians continue to overestimate adherence levels and payers are not yet shouting loudly enough for the industry to make the significant investment needed to solve this issue. In the meantime, the opportunity remains. Pharma and patients will reap the benefits when, not if, more effective solutions to non-adherence take hold. Only then will

the tide begin to turn.

This report will enable you to

Understand why adherence solutions are now more patient-centric

Review the commercial arguments for an effective adherence programme

Find out more about the initiatives already being undertaken to tackle non-adherence

Discover how successful adherence support programmes are designed and implemented

Gain insight into the evolving role of patient-centric teams

Learn about new methods of measuring adherence

Plan ahead for the key trends expected to impact future adherence programmes

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