

Capgemini Consulting press contact:

Glen Nelson

Tel.: +1 312 725 0325

Email: glen.nelson@capgemini.com**Omnicom Health Group press contact:**

Joanne Trout

Tel.: +1 212 415 3669

Email: joanne.trout@omnicomgroup.com

Survey: Real-World Evidence Ranked as the Most Influential Data Source Informing Physician's Treatment Decisions

Capgemini Consulting and Omnicom Health Group's research study reveals impact of heightened financial risk for Organized Providers and growing importance of real-world data, offers recommendations for pharma's operating model

New York, February 28, 2017 – In a survey of 866 U.S. physicians, respondents ranked real-world evidence as the most important data informing treatment decisions, followed by clinical trial data. Analyzed in the research study [“Tracking the Shift From Volume to Value in Healthcare”](#) by [Capgemini Consulting](#) and [Omnicom Health Group](#), the authors argue that this finding is just one of the ways providers are changing behaviors as their financial risk increases, and the pharmaceutical industry must rethink how it demonstrates the value of its products in response.

The survey reveals that nearly two-thirds of Organized Providers¹ are reimbursed primarily through alternative payment models designed to hold them accountable for quality, cost and patient outcomes. As financial risk shifts from the payer to the provider, new investments are required to achieve clinical and business goals. For example, to gain access to real-world data sets that can generate more powerful insights, providers are furthering technology integration with increasingly sophisticated digital health technologies.

These shifts drastically change the expectations that providers have for the pharmaceutical industry, and the role it can play in guiding and supporting customers through this evolving landscape. In response to the increased reliance on real-world evidence, pharmaceutical companies can look to collaborate with the most highly integrated health systems to co-develop and maintain appropriate real-world evidence databases that support care pathway development and track performance.

“Our study reveals that 60 percent of physicians are employed by an Organized Provider, and two-thirds are already being reimbursed by mechanisms that share financial risk which is driving them to rank real-world data over clinical trial information, transforming the way they make treatment decisions,” said Shiraz Hasan, a vice president in Capgemini Consulting's North American life sciences practice. *“The*

¹ Includes Integrated Health Networks (IHNs), Physician Hospital Organizations (PHOs), Accountable Care Organizations (ACOs) and large multi-specialty medical groups.

pharmaceutical industry is about to go through a complete reframing of how they market and provide value to the physician community given the changes in the landscape stemming from the shift to value-based care that is upon us right now.”

The research study explores other ways Organized Providers are at the frontier of health reform, and the corresponding ways that pharmaceutical companies are responding. For example, nearly 50 percent of Organized Provider physicians said that digital communication channels were their preferred method of communication, with Health Information Technology systems providing new engagement opportunities. The authors recommend that pharmaceutical companies continue to invest in digital communication channels and solutions that integrate pharmaceutical content into electronic health records and clinical decision support systems to engage providers throughout the care continuum.

“The study clearly reinforces the need for pharmaceutical companies to advance digital communications and integrate real-world evidence that will support and accelerate provider treatment decisions,” said Jo Ann Saitta, Chief Digital Officer, Omnicom Health Group.

Read the full study here: www.volumetovaluestudy.com.

Research Methodology

Omnicom Health Group and Capgemini Consulting conducted a survey of 866 U.S.-based physicians, representing 27 specialties across all 50 states, leveraging Omnicom Health Group’s proprietary HCP Insights™ database. Respondents were split approximately 50/50 between generalists and specialists. Organized Providers were defined as physicians belonging to any one of three groups: Large Multispecialty Medical Groups, Physician Hospital Organizations (PHOs) or Integrated Health Networks (IHNs). The study was fielded for two weeks between September and October 2016. In addition, the study results were verified through ten in-depth focus interviews with Organized Providers and discussions with leading pharmaceutical company stakeholders.

About Capgemini Consulting

Capgemini Consulting is the global strategy and transformation consulting organization of the Capgemini Group, specializing in advising and supporting enterprises in significant transformation, from innovative strategy to execution and with an unstinting focus on results. With the new digital economy creating significant disruptions and opportunities, the global team of over 3,000 talented individuals works with leading companies and governments to master Digital Transformation, drawing on their understanding of the digital economy and leadership in business transformation and organizational change. Find out more at: <http://www.capgemini-consulting.com>.

About Omnicom Health Group

Omnicom Health Group (www.omnicomhealthgroup.com) is a global collective of communications companies with more than 3,200 dedicated healthcare communications specialists. It provides marketing services to the health and life-science industries through a combination of specialized agencies, customized client solutions, and collaborations with other Omnicom network agencies. Organized around four customer groups—healthcare professionals, patients, payers, and medical, evidence and regulatory stakeholders—Omnicom Health Group serves more than 100 clients in over 55 offices worldwide.

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