

Accenture Life Sciences  
Rethink Reshape Restructure...for better patient outcomes

# Patient Services – Pharma's Best Kept Secret

Key findings and insights from a survey of 10,000 patients around the world examining their unmet service needs in seven different therapeutic areas across the entire patient journey.



 Germany Summary (2,000 patients):

 1. Patients **want more** help before they are being treated.

**60%** said pre-treatment is the most frustrating period.



**31%** German patients' greatest frustration is little notification of being at risk for a condition.

 2. Patients are generally **not aware** of services available to help them.

Awareness is low across all services

Lowest awareness

9%

Highest awareness

24%

Guidance on financial help with medical screening and tests.

Obtaining information on how to manage the specific condition.

Base: Germany (2,000)  
\*aggregated average across all services

**17%**  Less than **one out of five** German patients are aware of services available to them.\*



 3. When patients **are aware** of services, they use them.

**58%** Nearly six out of ten use services when they are aware of them.\*

Usage varies but is still generally high across all services.

**43%** for guidance on financial help with medical screening and tests.

**70%** for obtaining information on a specific condition.

 Lowest Usage

 Highest Usage



 4. Patients **value services** across all disease states.

In Germany, eight in ten patients (80%) rate the services used as 'extremely' or 'very' valuable\*

Lowest value

66%

Highest value

85%

Getting information on which support groups are available.

Getting insurance coverage.

Base: Those aware of services (varies for each service)  
\*aggregated average across all services



\*aggregated average across all services



5. Patients **want their healthcare professionals** to be the primary source of information on services they need to manage their health, but digital channels play a key role as well.



Doctors are one of the **top information sources** for German patients at **68%**.



Digital channels are a close second at **57%**.



want one point of contact to help manage their health.

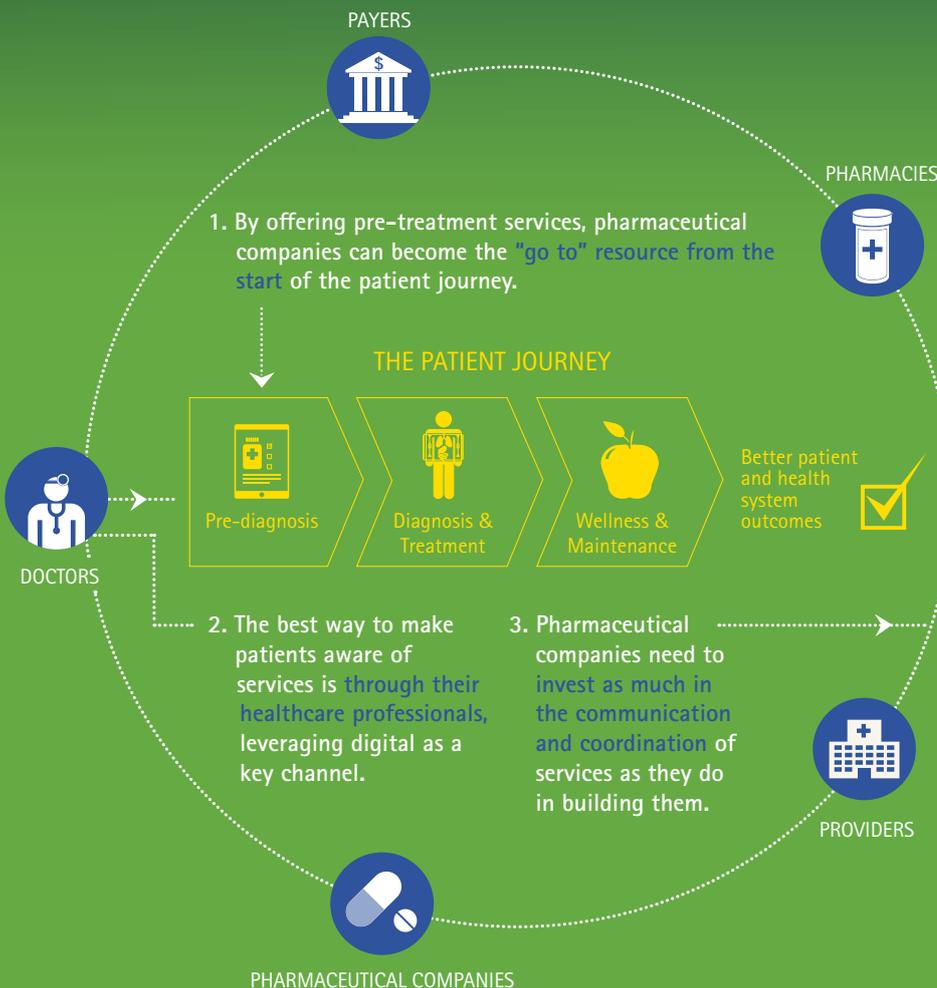


want this to be their healthcare professionals.



Only 2% said pharma companies.

## So what do these findings **imply** for pharmaceutical companies?



### About the Research

Online survey of 10,000 patients between December 2014 and January 2015, across five countries and seven therapeutic areas (heart, lungs, brain, cancer, immune system, bones, hormones/metabolism) to provide unparalleled patient insights on unmet needs across the patient journey. Respondents were 18 years or older, with annual household income at or above \$25,000. The questions explored respondents' perspectives on a variety of services, including information or education, financial assistance, reward programs, physician referrals, and nurse support.

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