

Accenture Life Sciences
Patient Inspired. Outcomes Driven.

LOST IN TRANSLATION: THE COMMUNICATION GAP IN PATIENT SERVICES

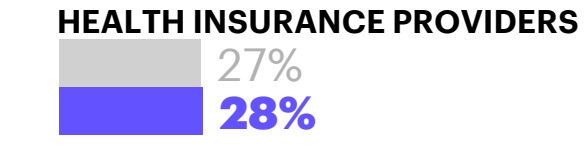
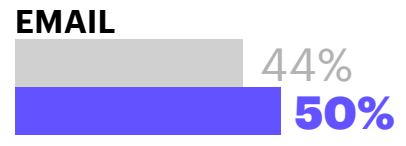
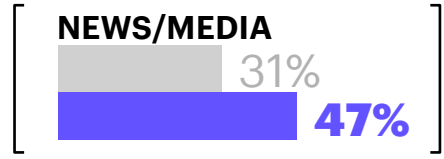
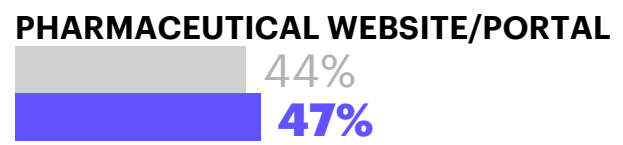
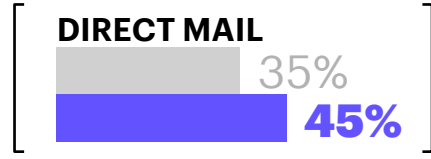
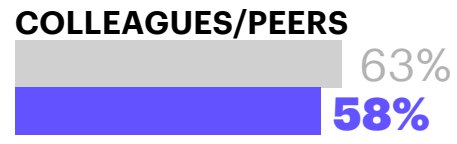
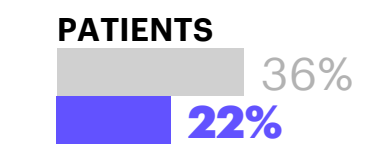
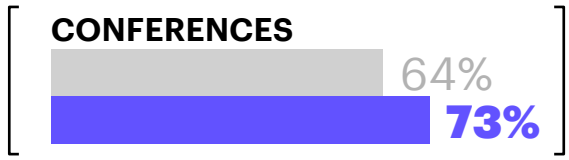
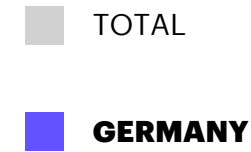
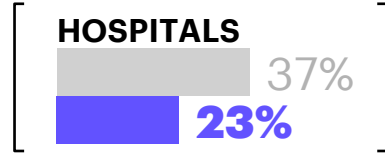
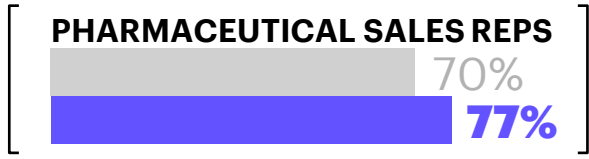
 **Germany Results**

Survey of 60 German healthcare professionals on what their awareness, use and value of patient services is across five therapeutic areas and general practitioners.



KEY FINDING #1

MOST HCPs ARE NOT VERY AWARE OF PATIENT SERVICES



Sales reps, followed by conferences are the primary ways HCPs hear about patient services. These top two ways are even more prevalent in Germany. Direct mail and news/media are also slightly more popular in Germany compared to the overall global average.

Q.6. Please select the top 5 channels through which you hear/learn about patient services offered by pharmaceutical/biotech companies the most. Please rank them in order of the channel you hear about patient services the most, to the channel you hear through the least. Rating per option

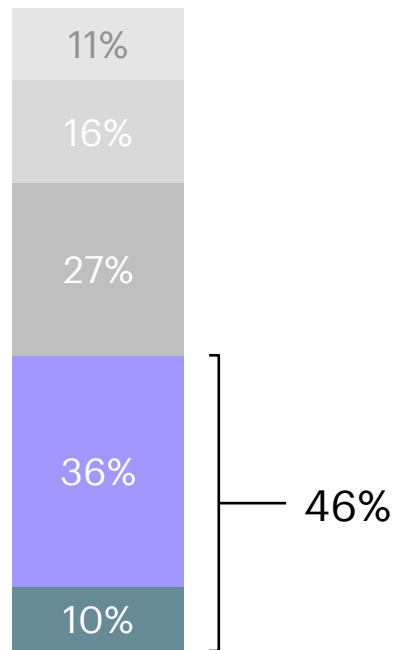
Base: Total Respondents **(362)**
Germany Respondents **(60)**

KEY FINDING #1 MOST HCPs ARE NOT VERY AWARE OF PATIENT SERVICES

Sales reps are the primary way HCPs hear about patient services, but most aren't talking about them.

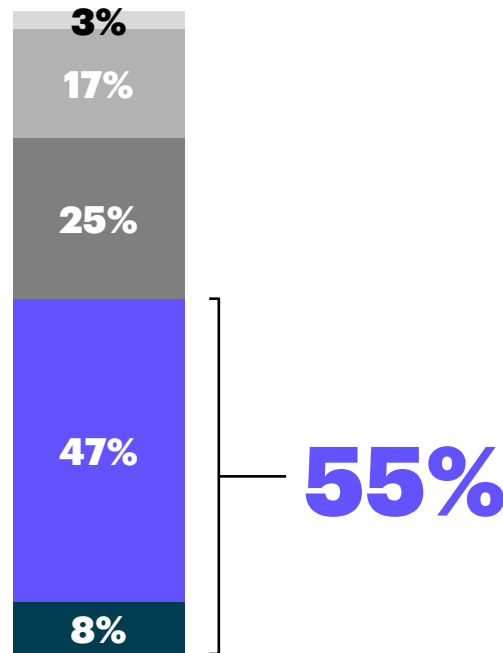
ALL COUNTRIES

- 76% - 100% OF THE TIME
- 51% - 75% OF THE TIME
- 26% - 50% OF THE TIME
- <25% OF THE TIME
- NEVER



GERMANY

- 76% - 100% OF THE TIME
- 51% - 75% OF THE TIME
- 26% - 50% OF THE TIME
- <25% OF THE TIME
- NEVER



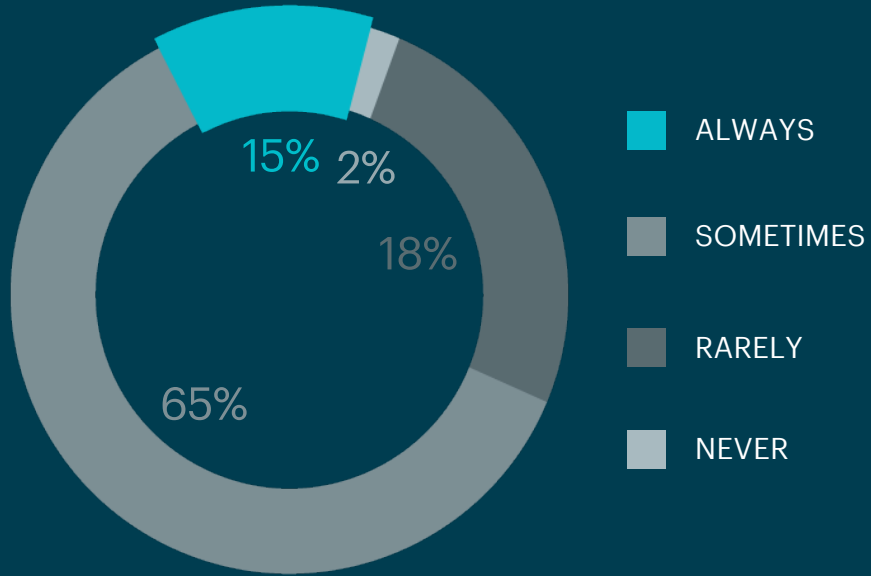
In Germany,
55%
of HCPs said they hear about patient services from sales reps less than 25% (vs. 46% across all countries).

Q.8. How often do you hear about patient services during in-person visits from Sales Reps? Single-coded question

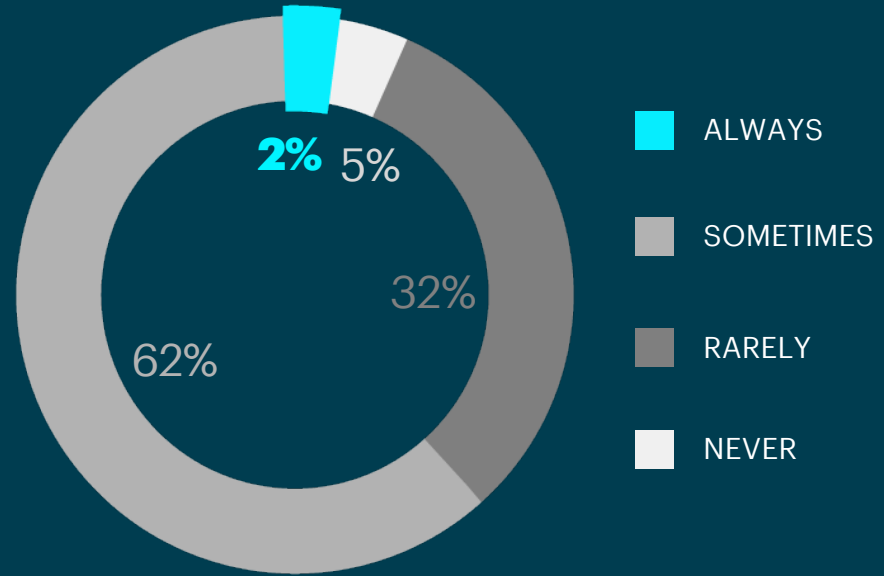
Base: Total Respondents (362)
Germany Respondents (60)

KEY FINDING #2 HCPs DON'T FREQUENTLY TALK ABOUT PATIENT SERVICES WITH THEIR PATIENTS

 OVERALL, **JUST 15%** OF HCPs ALWAYS PERSONALLY SHARE INFORMATION ON PATIENT SERVICES



IN GERMANY, IT IS SIGNIFICANTLY LESS  **AT 2%**



Q.19. How often do you personally share information regarding available patient services with your patients?
Single-coded question

Base: Total Respondents **(362)**
Germany Respondents **(60)**

KEY FINDING #2

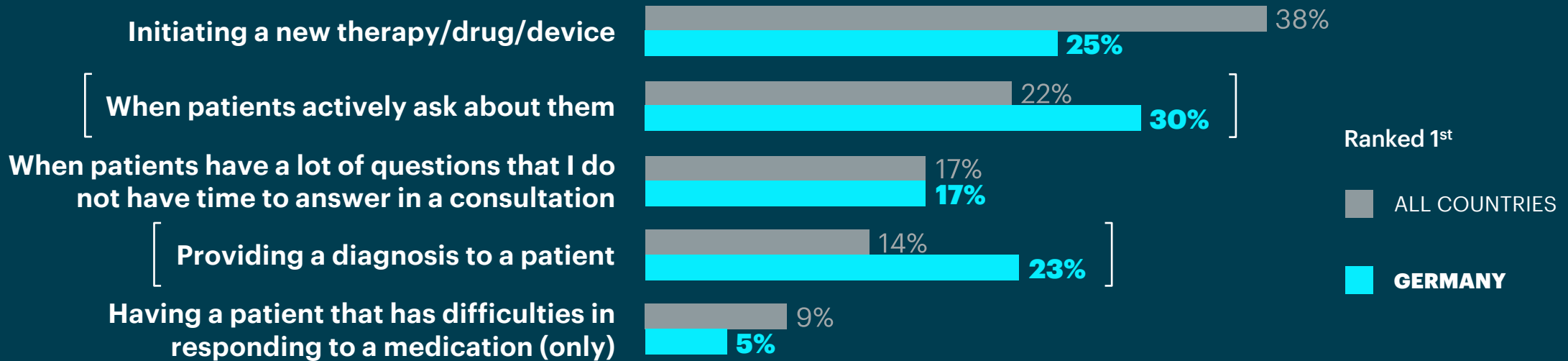
HCPs DON'T FREQUENTLY TALK ABOUT PATIENT SERVICES WITH THEIR PATIENTS



When HCPs do recommend them, they mainly do so to patients who are starting a new treatment.



In Germany, HCPs were more likely to recommend services when patients actively ask about them.



Q.11. What is the primary trigger for recommending a patient service? Please rank in order from the most important to the least important. RANK

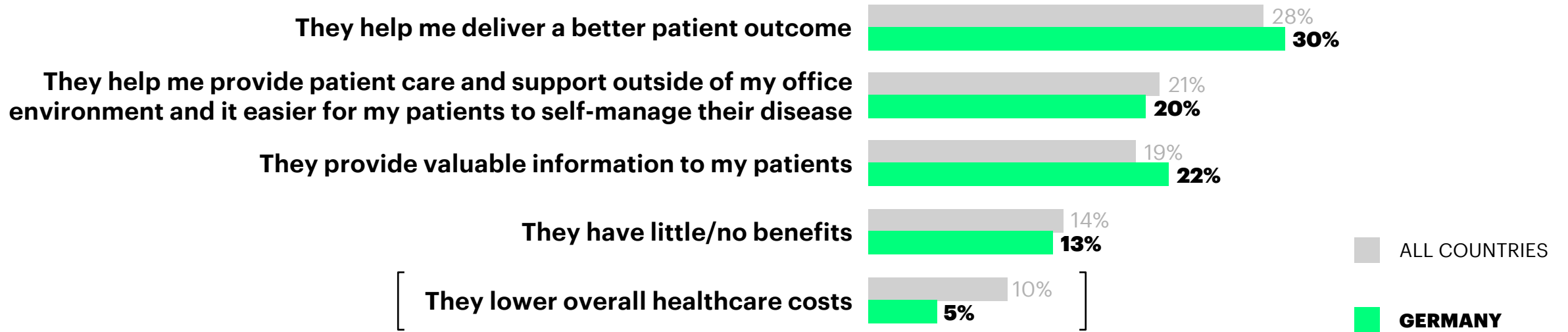
Base: Total Respondents (362)
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KEY FINDING #3

HCPs SEE BETTER PATIENT OUTCOMES AS THE PRIMARY REASON FOR USING SERVICES WITH PATIENTS



Delivering a better patient outcome is slightly higher than the all-country findings.



Q.15. Please rank the following aspects of patient services in terms of how beneficial they are from the most beneficial aspect to the least beneficial aspect. Rating per option

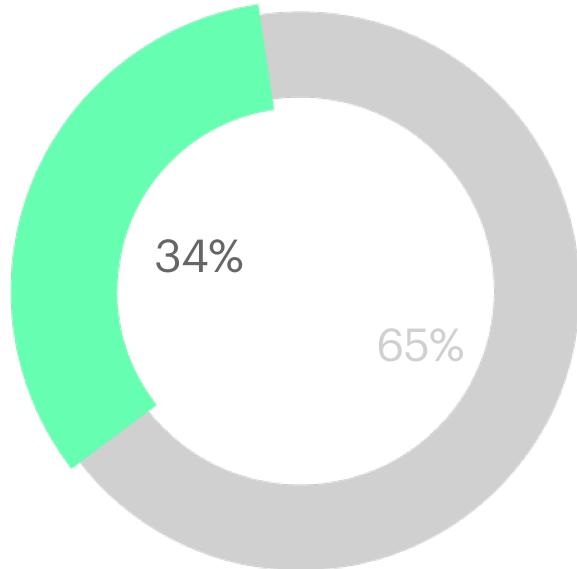
Base: Total Respondents **(362)**
Germany Respondents **(60)**

KEY FINDING #3

HCPs SEE BETTER PATIENT OUTCOMES AS THE PRIMARY REASON FOR USING SERVICES WITH PATIENTS



ONLY 1/3 OF SALES REPS PRESENT PATIENT SERVICES AS AN INTEGRATED SOLUTION THAT CAN HELP ACHIEVE TREATMENT OUTCOMES GLOBALLY



■ PRESENT PRODUCT AND SERVICE AS A HOLISTIC AND INTEGRATED SOLUTION TO IMPROVE OUTCOMES

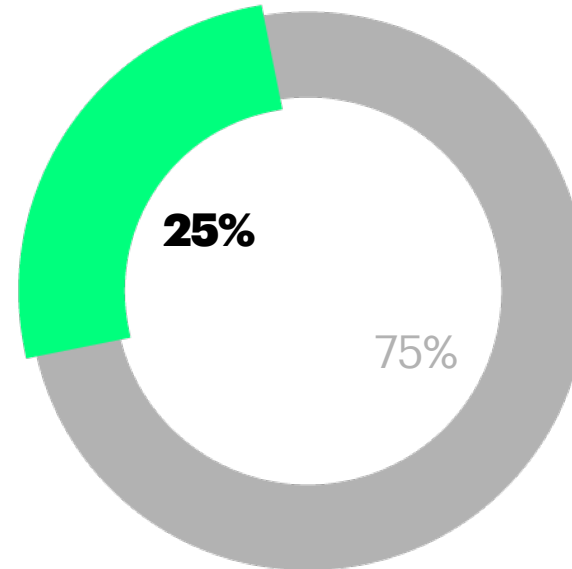
■ PRESENT PRODUCT FIRST AND THEN THE SERVICES

THIS DECREASES TO



1 IN 4

IN GERMANY



■ PRESENT PRODUCT AND SERVICE AS A HOLISTIC AND INTEGRATED SOLUTION TO IMPROVE OUTCOMES

■ PRESENT PRODUCT FIRST AND THEN THE SERVICES

Q.9. When pharmaceutical reps are talking about patient services during in-person meetings, how do they present them?
Single-coded question

Base: Total Respondents **(362)**
Germany Respondents **(60)**

SO WHAT DO PHARMA COMPANIES DO ABOUT THIS?

FILL THE COMMUNICATION GAPS

TO ENCOURAGE MORE HCPs TO RECOMMEND PATIENT SERVICES SO THAT PATIENTS CAN ACHIEVE BETTER HEALTH OUTCOMES



For global results, please visit:
[accenture.com/patientservicessurvey](https://www.accenture.com/patientservicessurvey)

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