


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% 

Guidance on financial help with medical screening and tests.

Highest awareness


24% 

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% 

Getting information on which support groups are available.

Highest value

85% 

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.

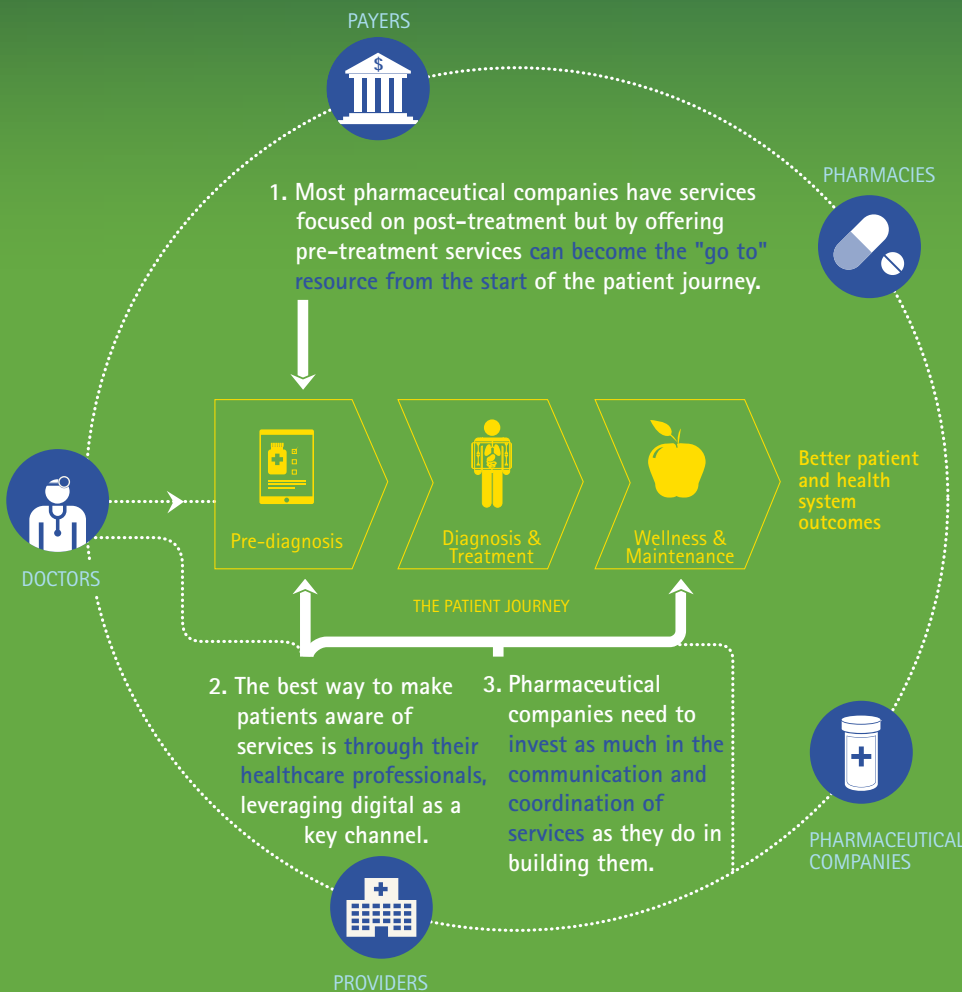


want this to be their healthcare professionals.



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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