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.

Brazil Summary (2,000 patients):

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

74% said pre-treatment is the most frustrating period.

39% Brazilian patients’ greatest frustration is a lack of help to ensure they have an up-to-date medical history.

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

Awareness is low across all services

<table>
<thead>
<tr>
<th>Lowest awareness</th>
<th>Highest awareness</th>
</tr>
</thead>
<tbody>
<tr>
<td>Guidance on financial help with medical screening and tests.</td>
<td>Getting referrals for/advice on specialists.</td>
</tr>
<tr>
<td>6%</td>
<td>31%</td>
</tr>
</tbody>
</table>

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

20% One out of five Brazilian 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.

42% for guidance on financial help with medical screening and tests.

72% for getting referrals for/advice on specialists.

4. Patients value services across all disease states.

In Brazil, over eight in ten (81%) rate the services used as ‘extremely’ or ‘very’ valuable

<table>
<thead>
<tr>
<th>Highest value</th>
<th>Highest value</th>
<th>Lowest value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Information on the specific condition.</td>
<td>Information on treatment options.</td>
<td>Information on how to manage the condition.</td>
</tr>
<tr>
<td>87%</td>
<td>87%</td>
<td>69%</td>
</tr>
</tbody>
</table>

Value of patient services by therapeutic area

Base: Those aware of services (varies for each service)
*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.

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.

For More Information, Contact:

Marcelo Duerto
marcelo.v.duerto@accenture.com