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.

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

<table>
<thead>
<tr>
<th>Lowest awareness</th>
<th>Highest awareness</th>
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<tbody>
<tr>
<td>Guidance on financial help with medical screening and tests.</td>
<td>Obtaining information on how to manage the specific condition.</td>
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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.*

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

70% for obtaining information on a specific condition.

4. Patients value services across all disease states.

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

<table>
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<th>Lowest value</th>
<th>Highest value</th>
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<td>Getting information on which support groups are available.</td>
<td>Getting insurance coverage.</td>
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85% for highest value

66% for lowest value

*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.