



LET'S TALK PATIENT SERVICES

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Market evolution

Ageing world population and emerging markets gaining market share



New Economic Reality

Price pressures and outcome-based reimbursements



Product changes

Scientific breakthroughs, personalised medicine and rise of generics



Patient Empowerment

due to digitally native customers and consumerization of healthcare



Business Model Disruption

with the convergence of industries and an increased focus on the patient

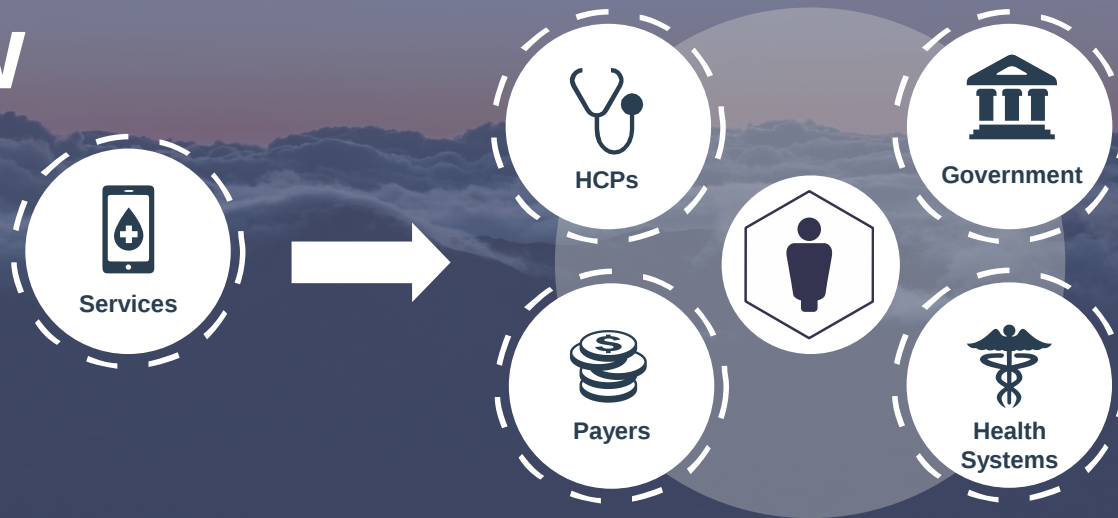
Today

Value propositions focus on clinical attributes of products versus competitors' and physician prescribers



Tomorrow

Value propositions focus on delivering outcomes-based health & therapy management services enabled through connected devices, sensors, services, social engagement, and broadly 'aware' solutions



Healthcare Tomorrow

<https://www.youtube.com/watch?v=C4LbAUa4ZwY>

High performance. Delivered.

Insight



Patient services are delivering value today with a significant increase in focus and investment expected over the next two years

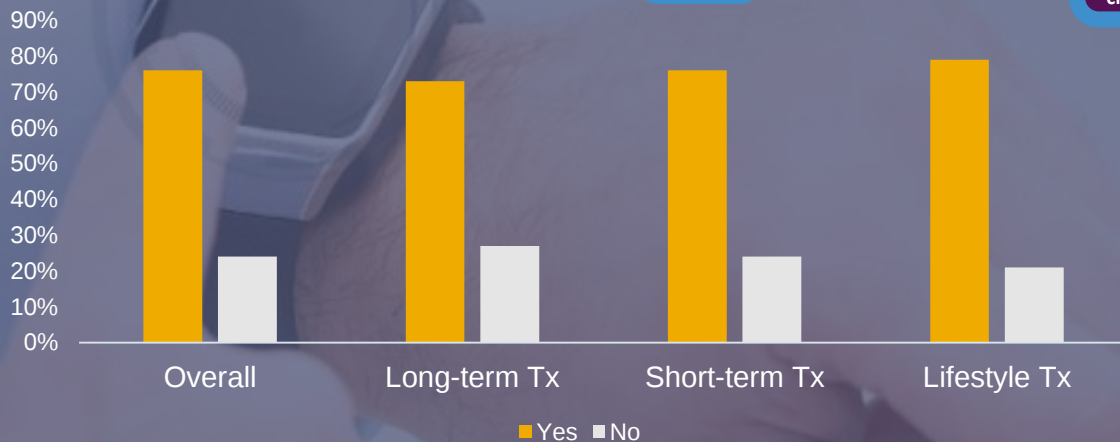
Companies are going big with investments in digital engagement technologies and supporting analytics

Much of this investment (but not all) is aligned to what patients' value

Patient Expectation

76%

of patients believe that Pharma have a responsibility to provide services that complement their products.



67%

Doctors are one of the primary sources of information for the majority of patients...

1st
choice

but digital channels are a close second at

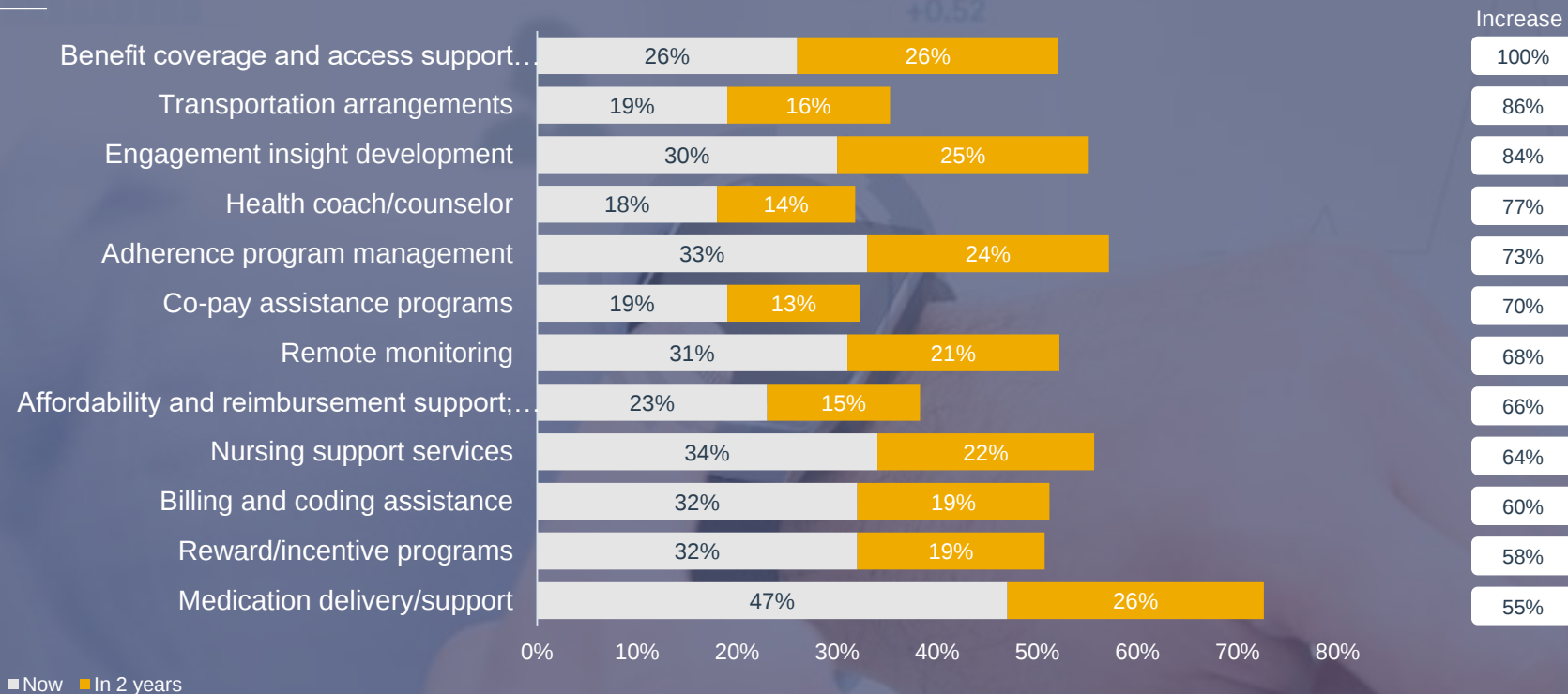
57%

(62% for 18-30 year olds).

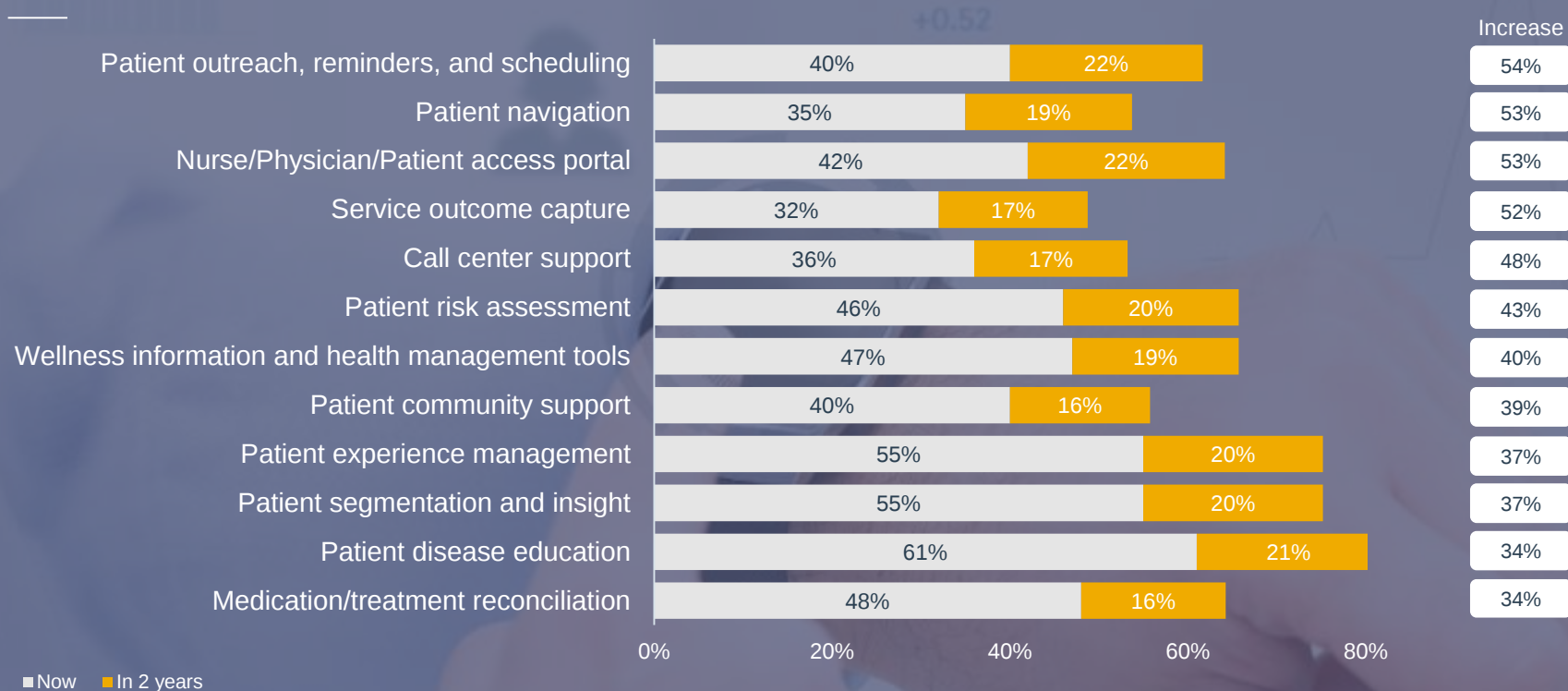


2nd
choice

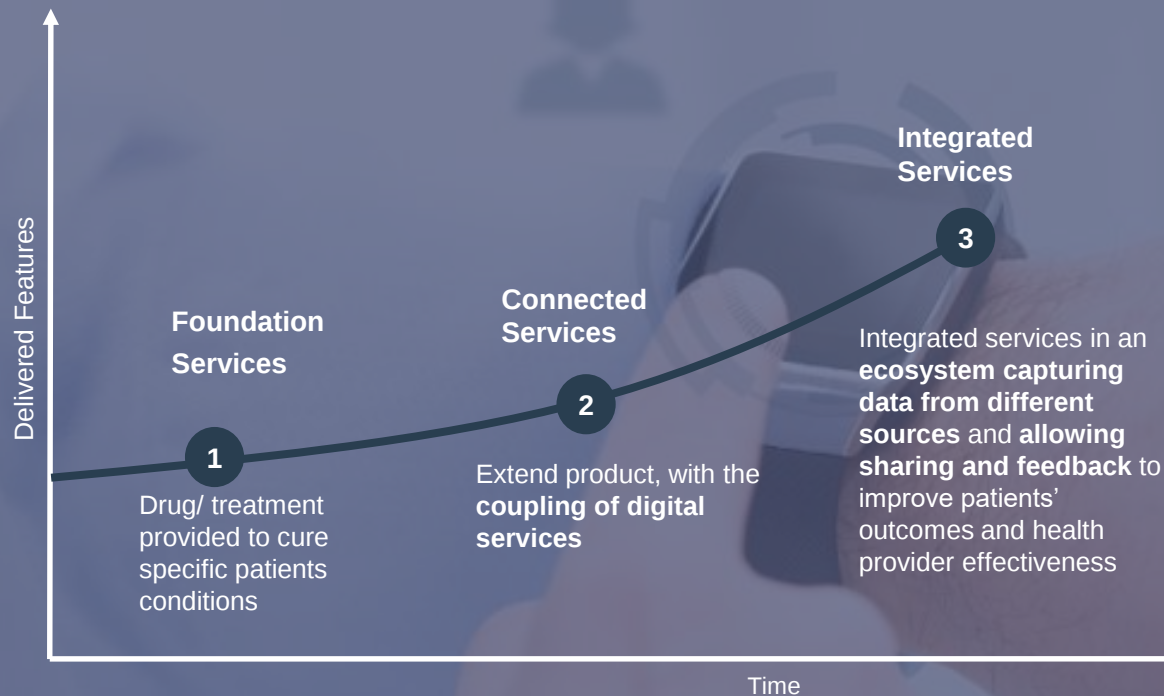
Patient Services Growth 1 – 12



Patient Services Growth 13 – 24



They journey we are on



65%

of all patients surveyed said pre-treatment is the most frustrating period.

Progress is truly life changing

Patient Services in R&D

https://mediaexchange.accenture.com/media/t/1_1h53ly9y

It's Not Just Research



Exploit New Data

From wearables and connected devices



Support Reimbursement



Continuous Patient Journey

from Research to Care

Integrated Healthcare Model

from Physician to Researcher



Impact on Technology



SENSORS

The market value for sensors that translate physical information into data will grow at a 36% CAGR from 2016 to 2020



CONNECTED DEVICES

The connected devices market will grow from 2.5 billion devices in 2009 to 30 billion by 2020



NETWORK CONNECTIVITY

Worldwide household Wi-Fi connectivity will grow to from 25% of all households to 42% of households by 2016



THE CLOUD

Cloud applications will account for 90% of total mobile data traffic by 2019 compare with 81% at the end of 2016



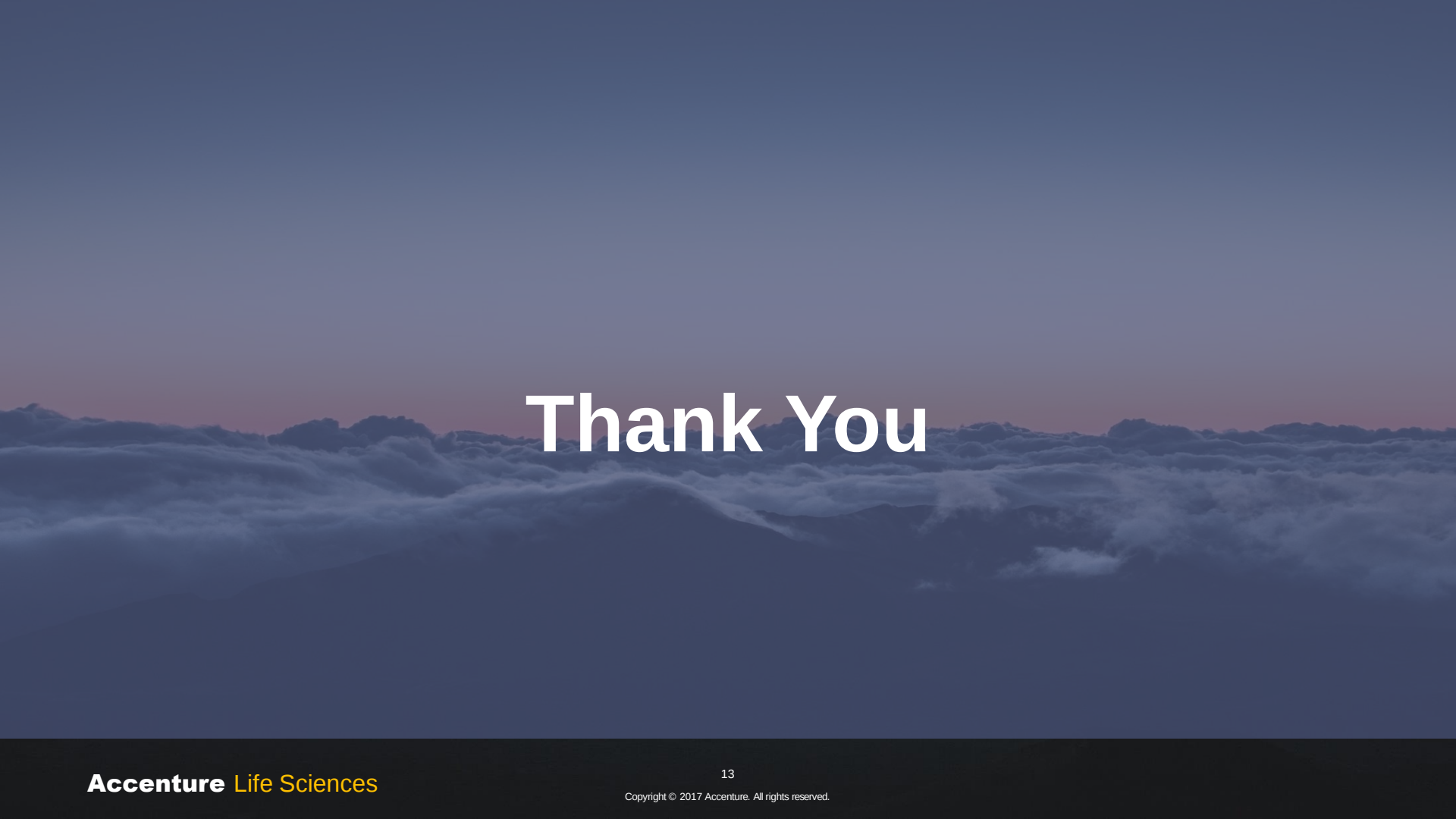
DATA & ANALYTICS

15.9 exabytes of mobile traffic data alone will be generated per month by 2018



USER INTERFACES

Rise of natural user interfaces (NUIs) where physical interfaces are replaced by parts of our bodies are emerging



Thank You