

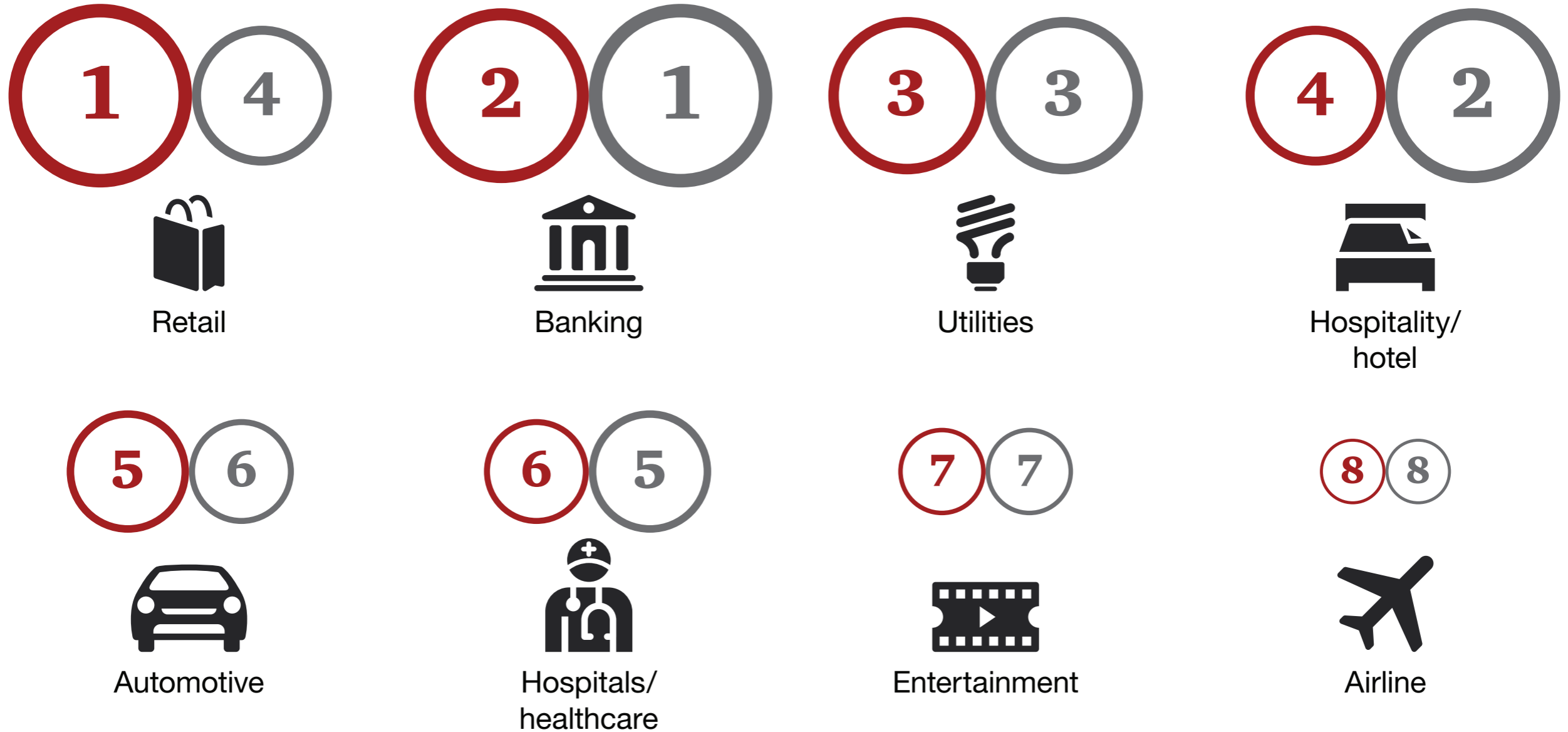
# *Top health industry issues of 2014*

Graphics chart pack

# Customer experience is slipping in healthcare

Please rank each industry on how well they serve you as a customer

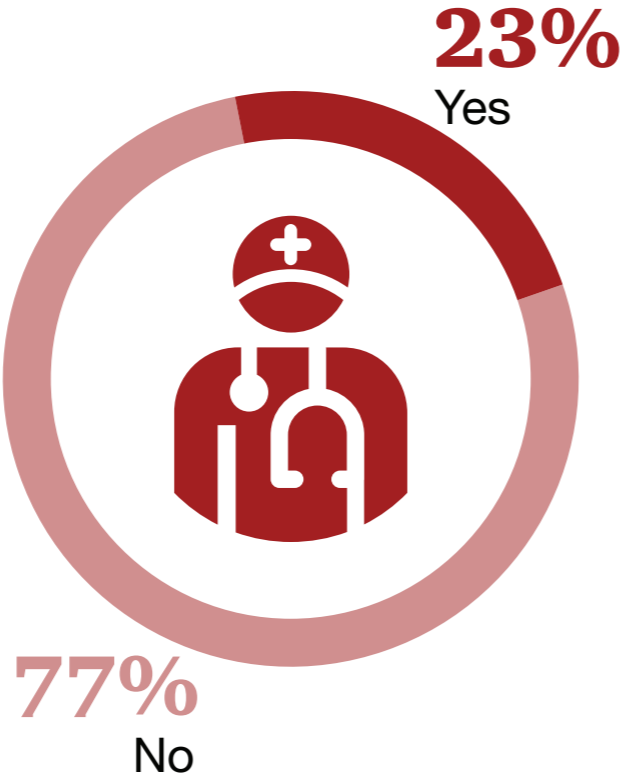
■ 2013 ■ 2012



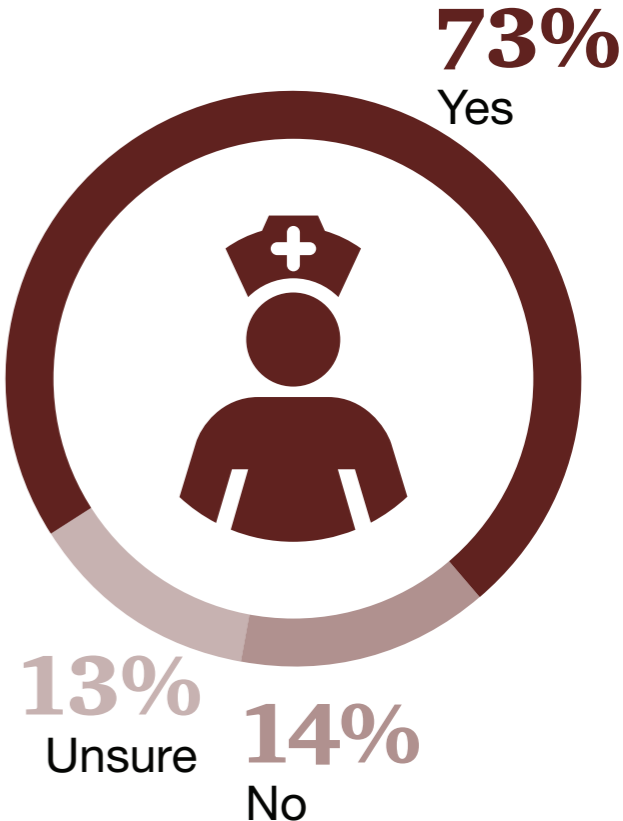
Source: HRI Consumer Survey, PwC, 2013

# As healthcare goes retail, there's room for growth

Have you (or someone in your household) ever sought healthcare treatment in a retail clinic?



Would you (or they) go to a retail clinic again in the future?

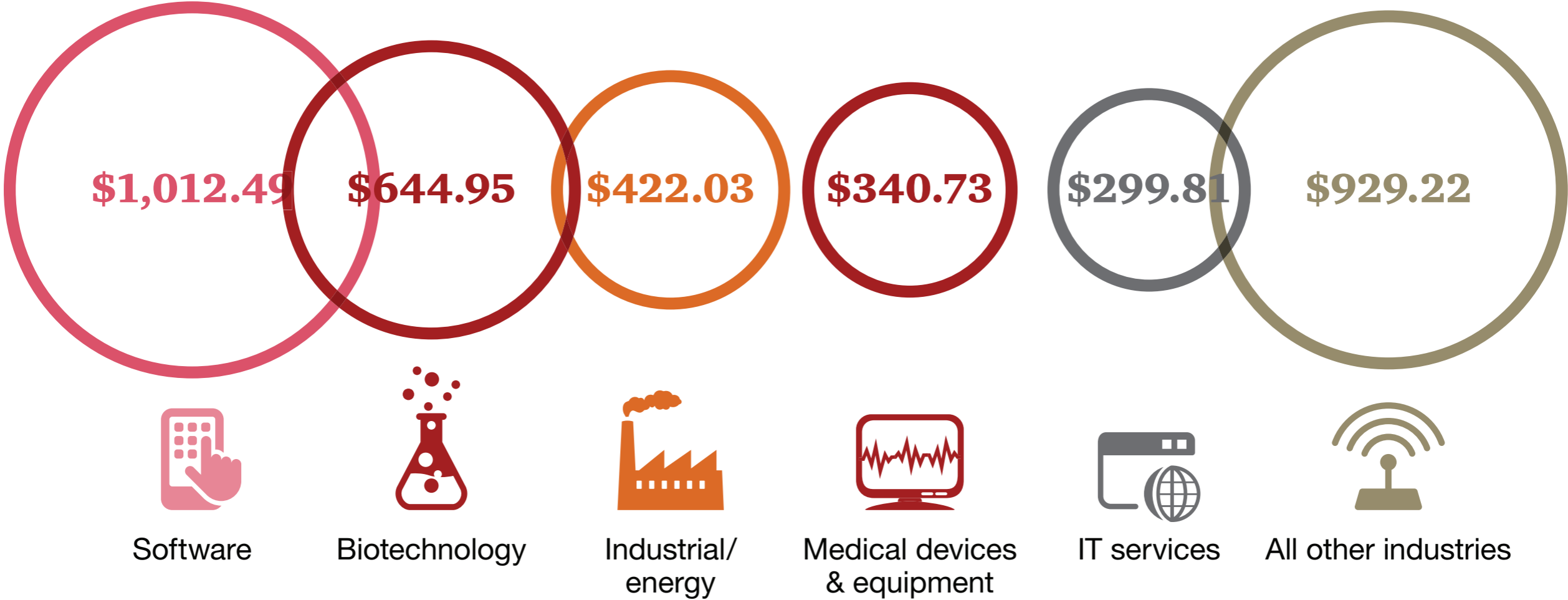


Source: HRI Consumer Survey, PwC, 2013



# Biotech ranks in top five for corporate venture capital investments

Money invested by corporate venture capitalists (in millions)

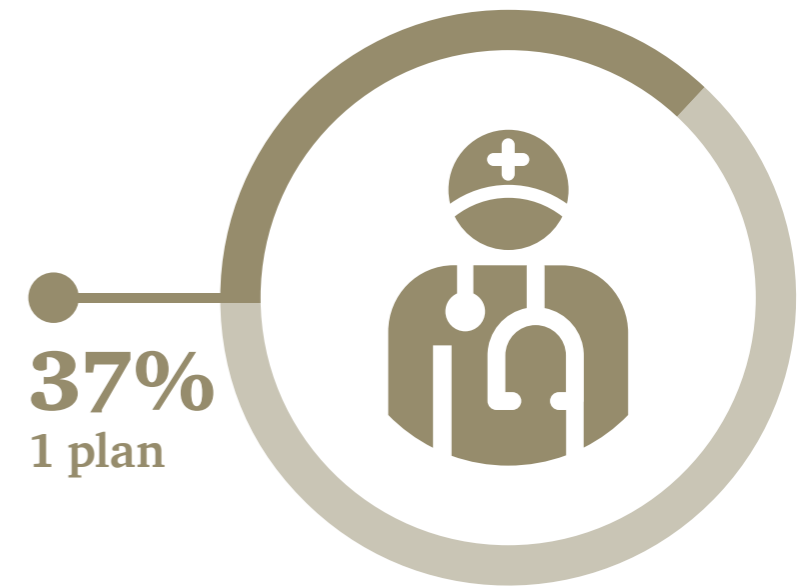
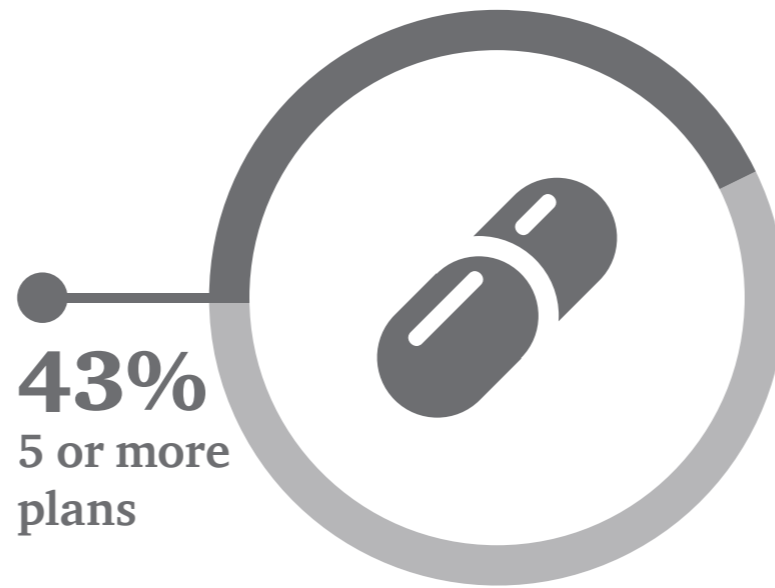
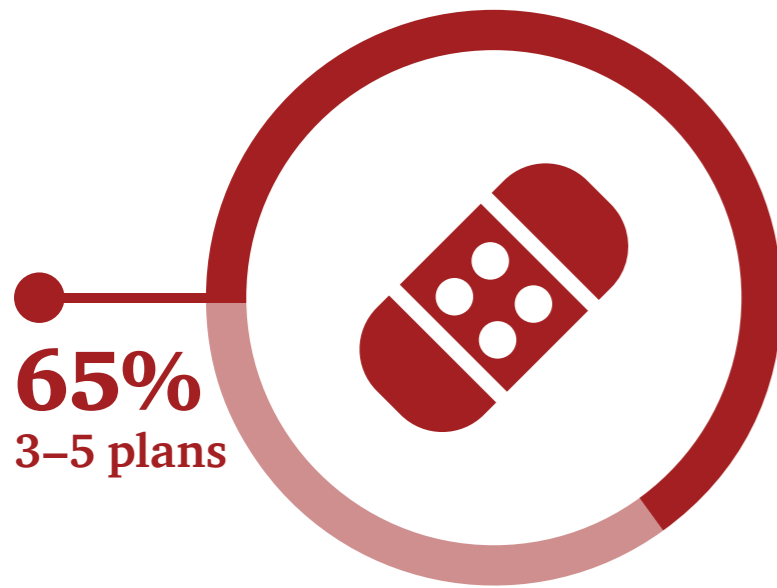


Source: PwC/National Venture Capital Association MoneyTree™ report; data: Thomson Reuters, data pertains to: 01/01/2012–06/30/2013



# Employees prefer some choice in health insurance plans

I prefer that my employer offer me...



Source: HRI Consumer Survey, PwC, 2013

# Hospital prices remain a mystery for a majority of consumers

I have enough information on prices for the following types of medical care



**61%**

Prescription  
drugs



**54%**

Doctor visits



**43%**

Medical devices



**41%**

Hospital  
emergency  
services



**40%**

Hospital  
non-emergency  
services

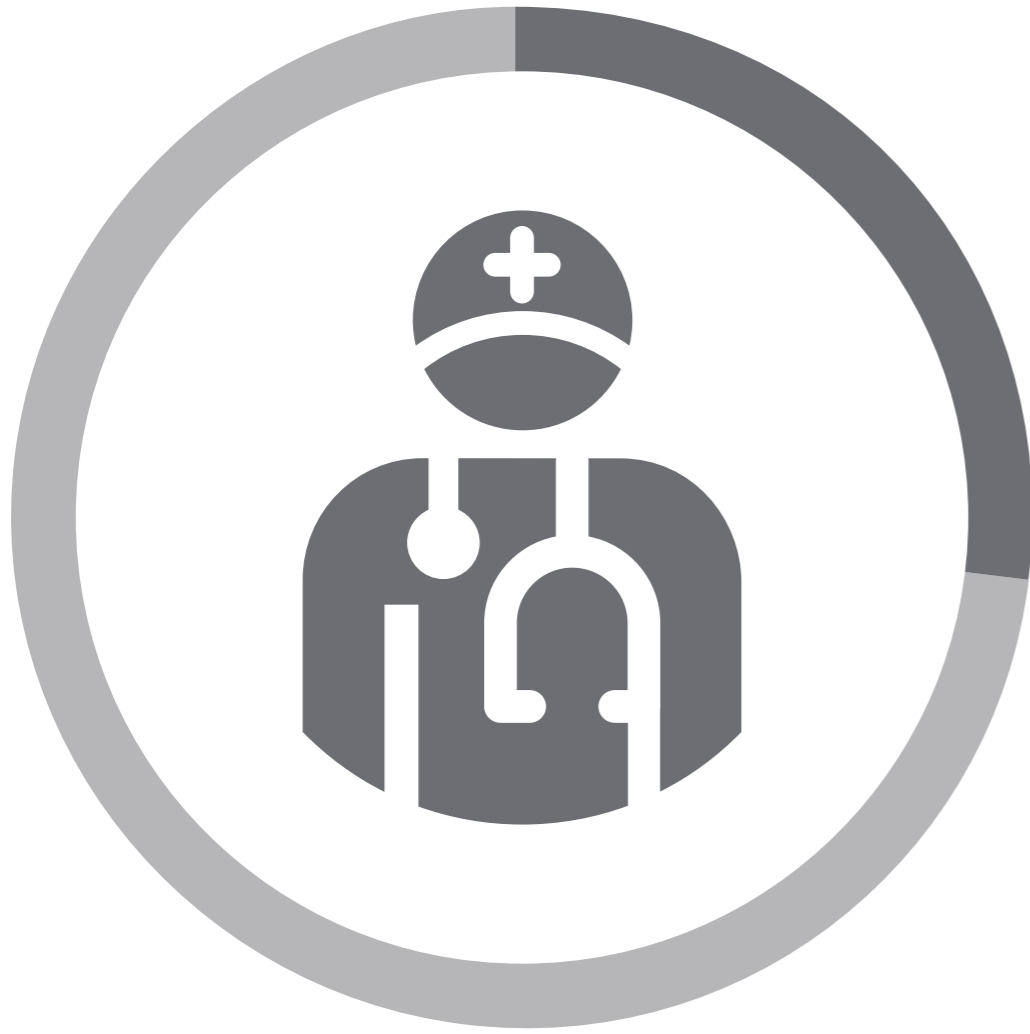


**37%**

Lab tests

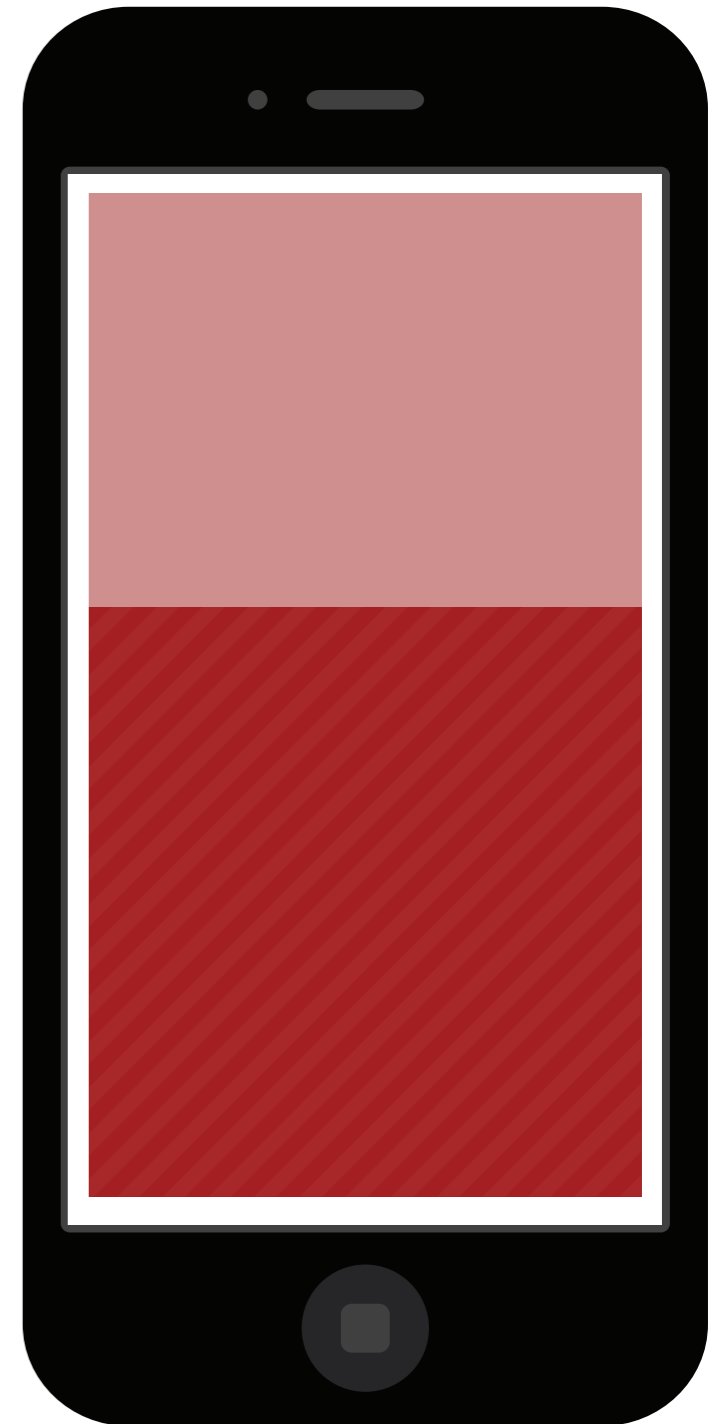
Source: HRI Consumer Survey, PwC, 2013

# *The future of healthcare is mobile*



Today, only **27%** of **physicians** are encouraging patients to use mobile health applications.

But **59%** of **physicians and insurers** believe that widespread adoption of mobile health applications in the near future is unavoidable.



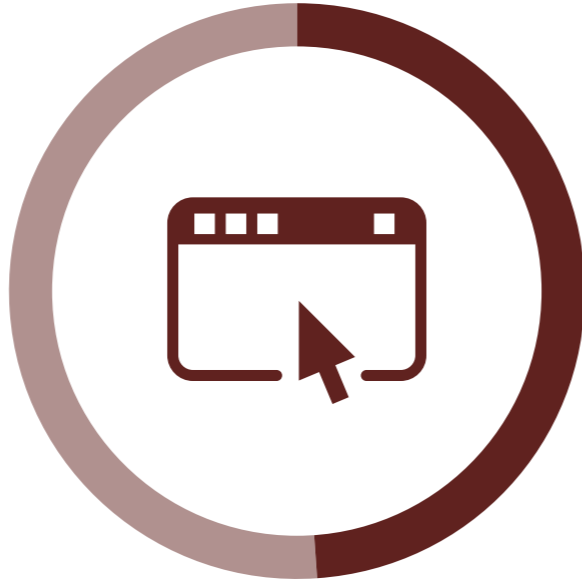
Source: Economist Intelligence Unit mHealth Survey (commissioned by PwC), 2012

# Consumers turn to technology to communicate with providers

How willing would you be to communicate with your doctor, nurse or caregiver in the following way?  
Respondents that cited “very willing” or “somewhat willing”



**69%**  
Email



**49%**  
Online chat or web portal



**45%**  
Text message



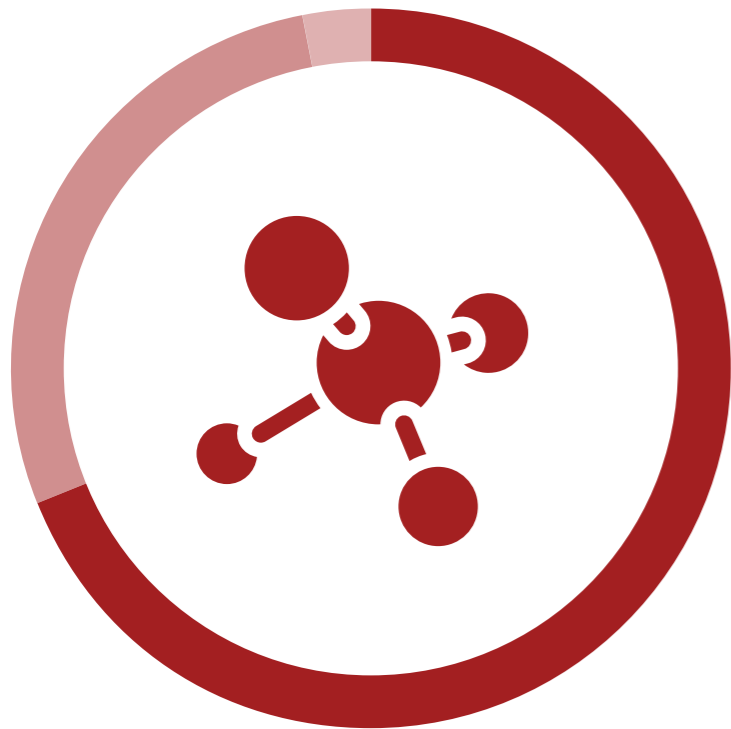
**40%**  
Mobile health applications

Source: HRI Consumer Survey, PwC, 2013

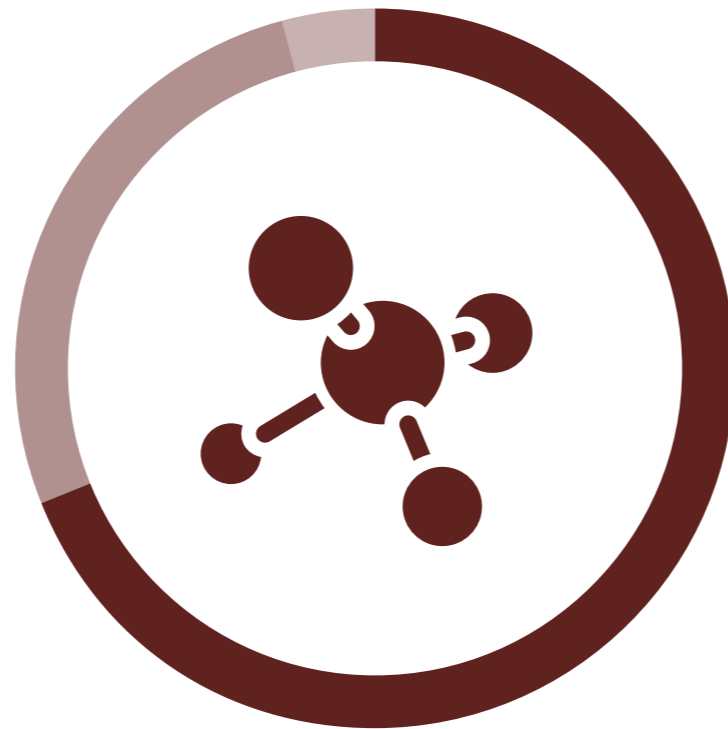


# Research and development remains an economic engine in the eyes of consumers

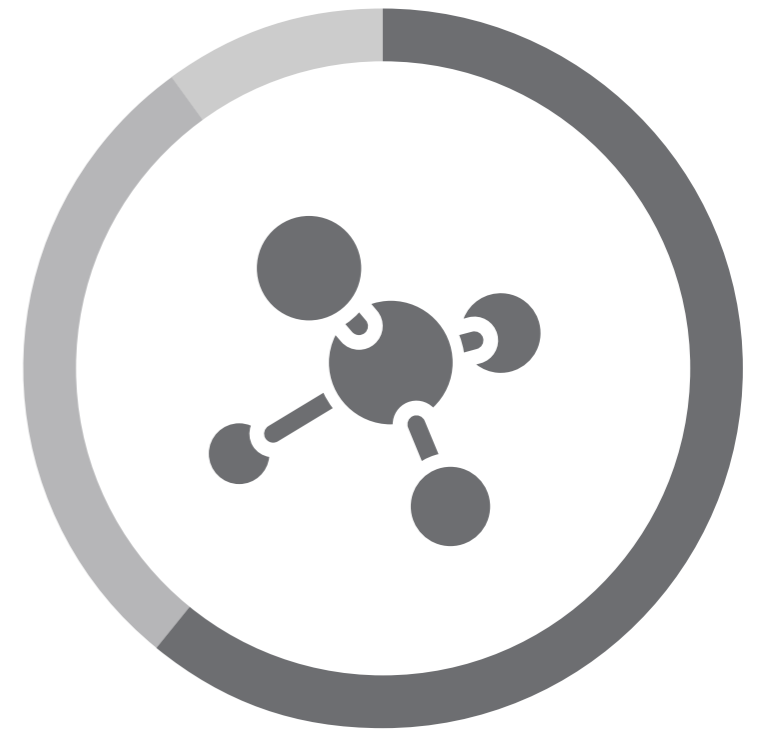
Do you agree that pharmaceutical and biomedical research is important for economic growth?



**69%**  
agreed in 2013



**69%**  
agreed in 2012

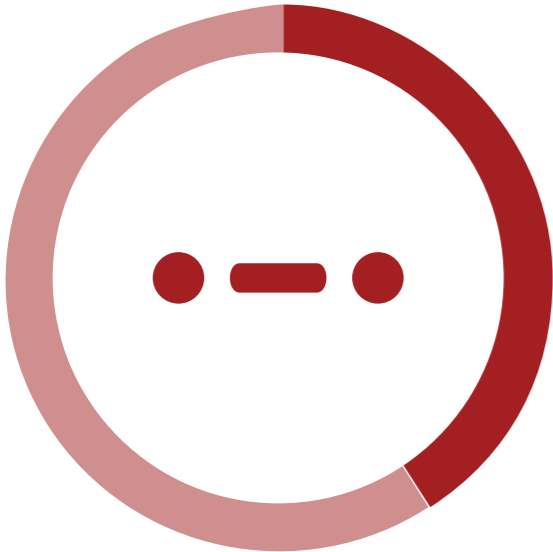


**61%**  
agreed in 2011

Source: HRI Consumer Survey, PwC, 2013

# Few companies manage innovation for maximum efficiency and breakthrough results

Which of the following best describes the way that your company manages its innovation process?



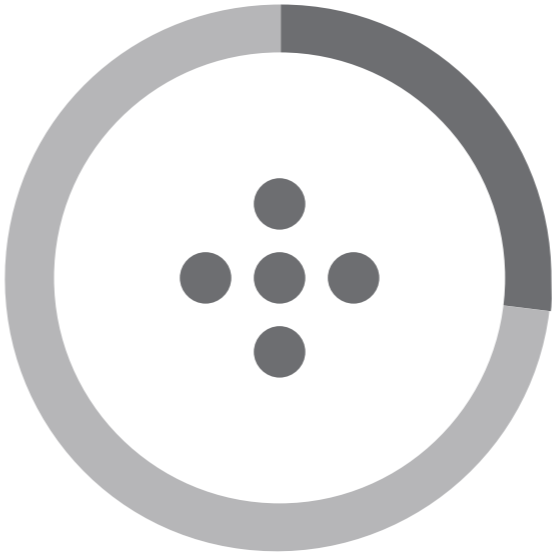
**41%**

In a structured way there is alignment from concept



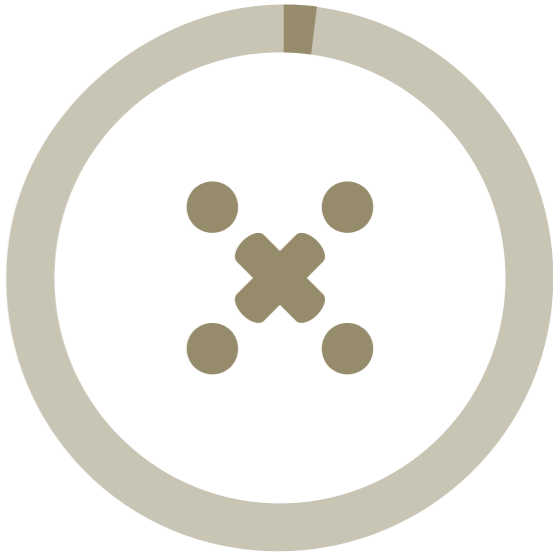
**30%**

Informally projects arise out of market needs or good deeds



**27%**

Formally all innovation activities are coordinated

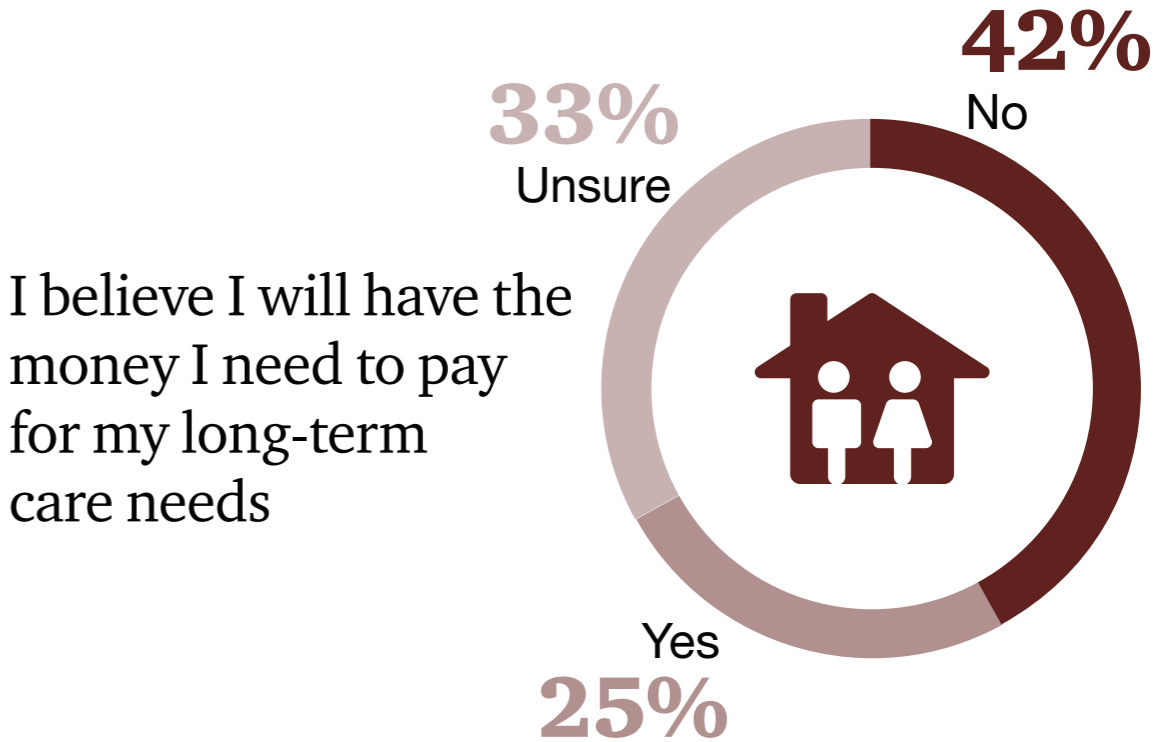
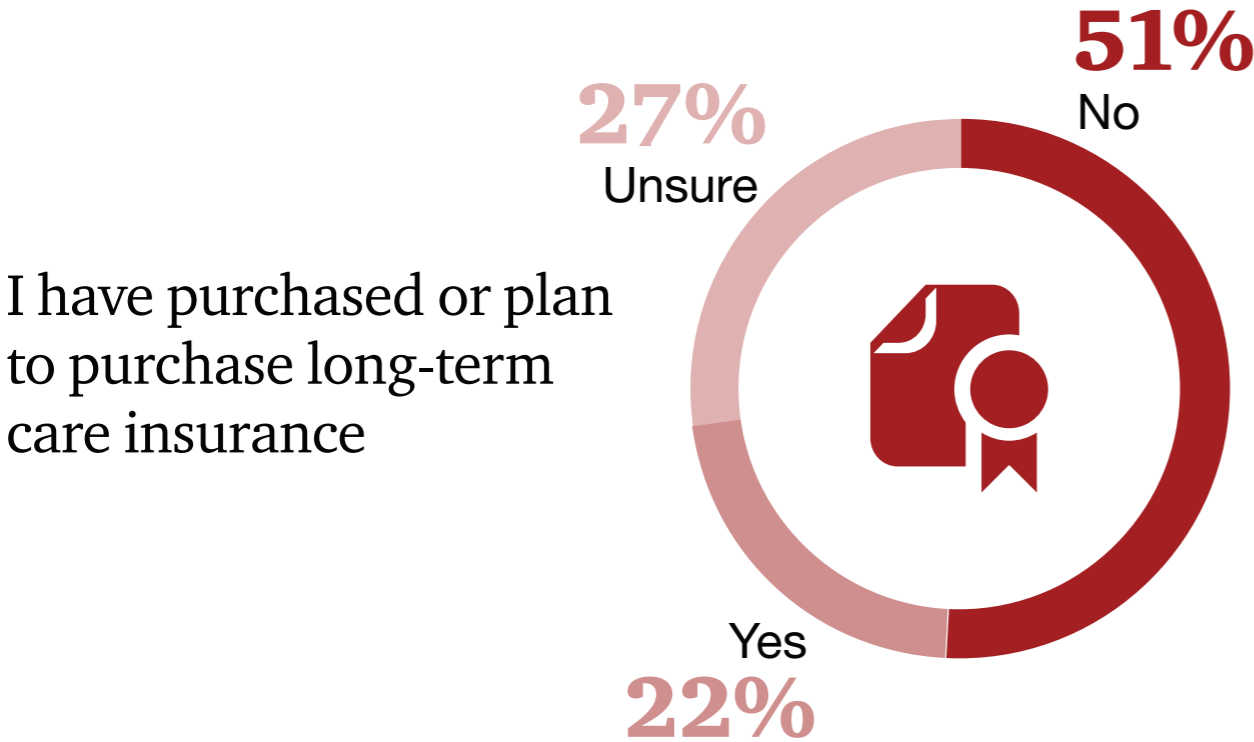


**2%**

Other

Source: Global Innovation Survey, PwC, 2013

# Consumers know they are unprepared for long-term care costs

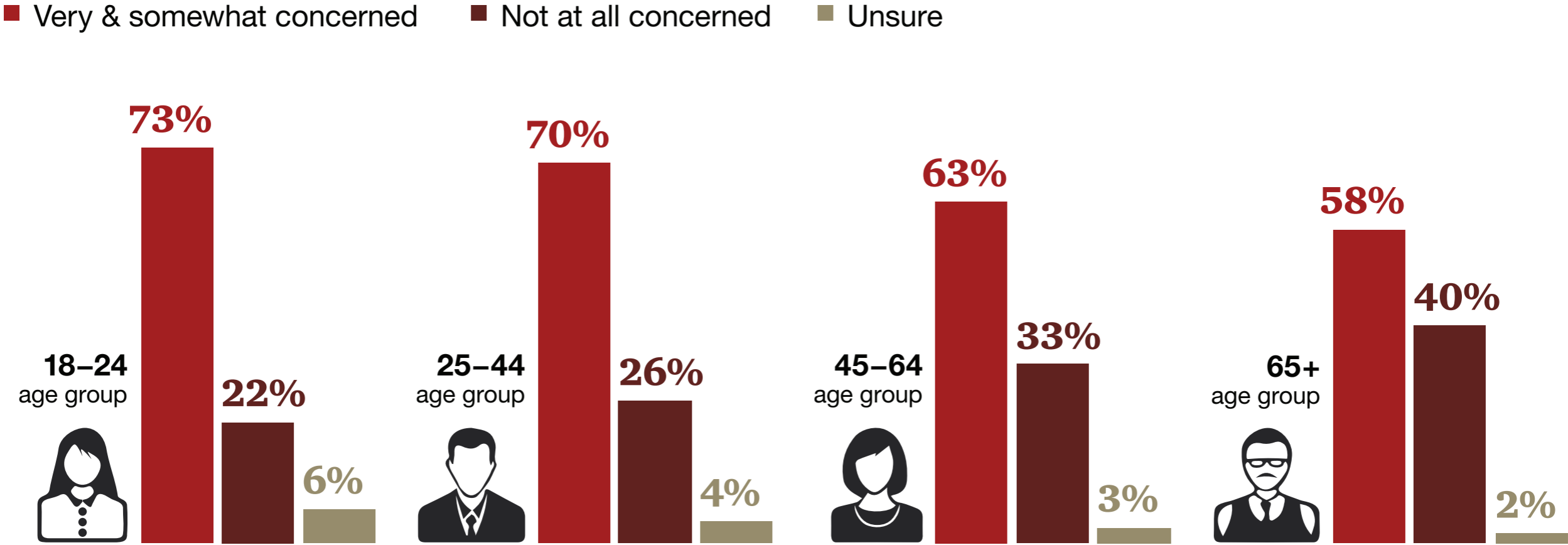


Source: HRI Consumer Survey, PwC, 2013



# Younger consumers are more concerned about the safety and quality of their medications

How concerned are you about the safety and quality of the drugs you take?



Source: HRI Consumer Survey, PwC, 2013



