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- NEWS ALERT -

Capgemini Consulting study highlights global issue of patient non-adherence to medication

Vision & Reality Report 2011 shows dramatic drop in prescription refills after six months

Paris, 26 May 2011 – A new report released today by Capgemini Consulting, the global strategy and transformation consulting brand of the Capgemini Group, highlights the growing concern among healthcare professionals and the life sciences industry about the lack of patient adherence to complete prescribed courses in medication and the significant health and cost repercussions. The 9th edition of Capgemini's Vision & Reality report provides an in-depth look at understanding the barriers to improving patient adherence and proposed recommendations to improve care through adherence. According to the report, the average adherence rate drops significantly from 69% for first filling of prescription, to a 40% drop in adherence from the first prescription to continuous refill after six months.

Recent studies estimate that non-adherence results in an incremental 131,400 deaths per year in the U.S., and 194,500 in the E.U., and significantly higher healthcare costs (e.g., close to \$300 billion annually in the U.S., and 125 billion Euros in the E.U.). Improved patient adherence will lead to improved health outcomes, significant cost savings for the healthcare system, and better revenue generation for the pharmaceutical industry. For these reasons, patient adherence is beginning to gain more focus among companies, health authorities, payers¹ and providers.

Patient adherence is difficult to address because each situation is specific, based on patient behaviors, or the condition he or she is being treated for. The healthcare system does not have aligned incentives for all stakeholders to monitor and improve treatment adherence. Poor understanding of patient needs and behaviors, insufficient prioritization or siloed approaches can hold back programs helping patients undergo complete, on-time and at prescribed dosage courses of medication.

¹ Refers to entities other than the patient that finance or reimburse the cost of health services - in most cases, this term refers to insurance carriers, other third-party payers, or health plan sponsors (employers or unions).

As a global leader in consulting across the healthcare and pharmaceutical market, Capgemini Consulting's Life Sciences practice is calling for the life sciences and healthcare industries to implement 8 recommendations:

- Elevate patient adherence as a strategic issue as a business lever compared to new treatment initiation
- Consider adherence as part of the product value proposition early in development
- Understand where the patient utilization drop-offs are and what is their root cause
- Collaborate across stakeholder groups (caregivers, patients, providers, payers) to address adherence
- Maximize patient touch points at critical stages in the patient journey to address drop-off risks
- Ensure investments focus on the appropriate patients, by identifying the patients who are already adherent and the ones that will never respond to incentives or support
- Enrich the patient experience
- Gather feedbacks from patient adherence programs and create a continuous improvement loop

Capgemini Consulting is also calling for the healthcare industry to take advantage of emerging technology tools including digital health media, such as patient records digitization and trends in information-sharing through the web. This has the potential to allow healthcare stakeholders to manage information effectively, identify points in a patient journey where adherence ceases, causes for treatment cessations and to create programs to address them.

“The pharmaceutical industry needs to address patient adherence in a more strategic and integrated part of its activities, which will be good for the patients and for the industry overall,” said Jean-Marc Neimetz, Global Leader of the Life Sciences Practice, Capgemini Consulting. *“Pharmaceutical companies need to design and deploy programs targeted to the very specific patient situations and leverage both traditional and digital approaches to do so,”* adds Thomas Forissier, Principal, Life Sciences Practice, Capgemini Consulting.

Looking ahead, pharma companies must look to radically improve patient adherence. Rising healthcare costs have put severe pressure on the entire healthcare industry and made it imperative for all stakeholders to move beyond traditional boundaries and approaches to address the patient continuum of care.

To access the Capgemini report “Patient Adherence: The Next Frontier in Patient Care”, please visit:

<http://www.capgemini.com/services-and-solutions/by-industry/life-sciences/vision-and-reality/>

About the Vision & Reality Report 2011

Capgemini's Vision & Reality report incorporates information from over 60 interviews with Life Sciences executives. Responses came from the U.S. (approximately two-thirds) and Europe (approximately one-third). These interviews took place in Denmark, France, Germany, Poland, Sweden, Switzerland, the United Kingdom, and the United States. Executives covered a range of functions including Marketing, Medical Affairs, Pricing & Reimbursement / Managed Care, Research & Development, Sales, and Commercial Operations. In addition to interviews with pharma executives, interviews were held with other healthcare stakeholders including payers, pharmacists, patient associations, universities and foundations. This report is the 9th in a series of global studies

examining issues most likely to impact the industry in the near future, conducted and published by the Capgemini Consulting Life Sciences practice since 2001.

About Capgemini

Capgemini, one of the world's foremost providers of consulting, technology and outsourcing services, enables its clients to transform and perform through technologies. Capgemini provides its clients with insights and capabilities that boost their freedom to achieve superior results through a unique way of working, the Collaborative Business Experience™. The Group relies on its global delivery model called Rightshore®, which aims to get the right balance of the best talent from multiple locations, working as one team to create and deliver the optimum solution for clients. Present in 40 countries, Capgemini reported 2010 global revenues of EUR 8.7 billion and employs over 112,000 people worldwide.

More information is available at www.capgemini.com.

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