



Future of Life Sciences: Data, Digital & AI

KPMG in Thailand
June 2025



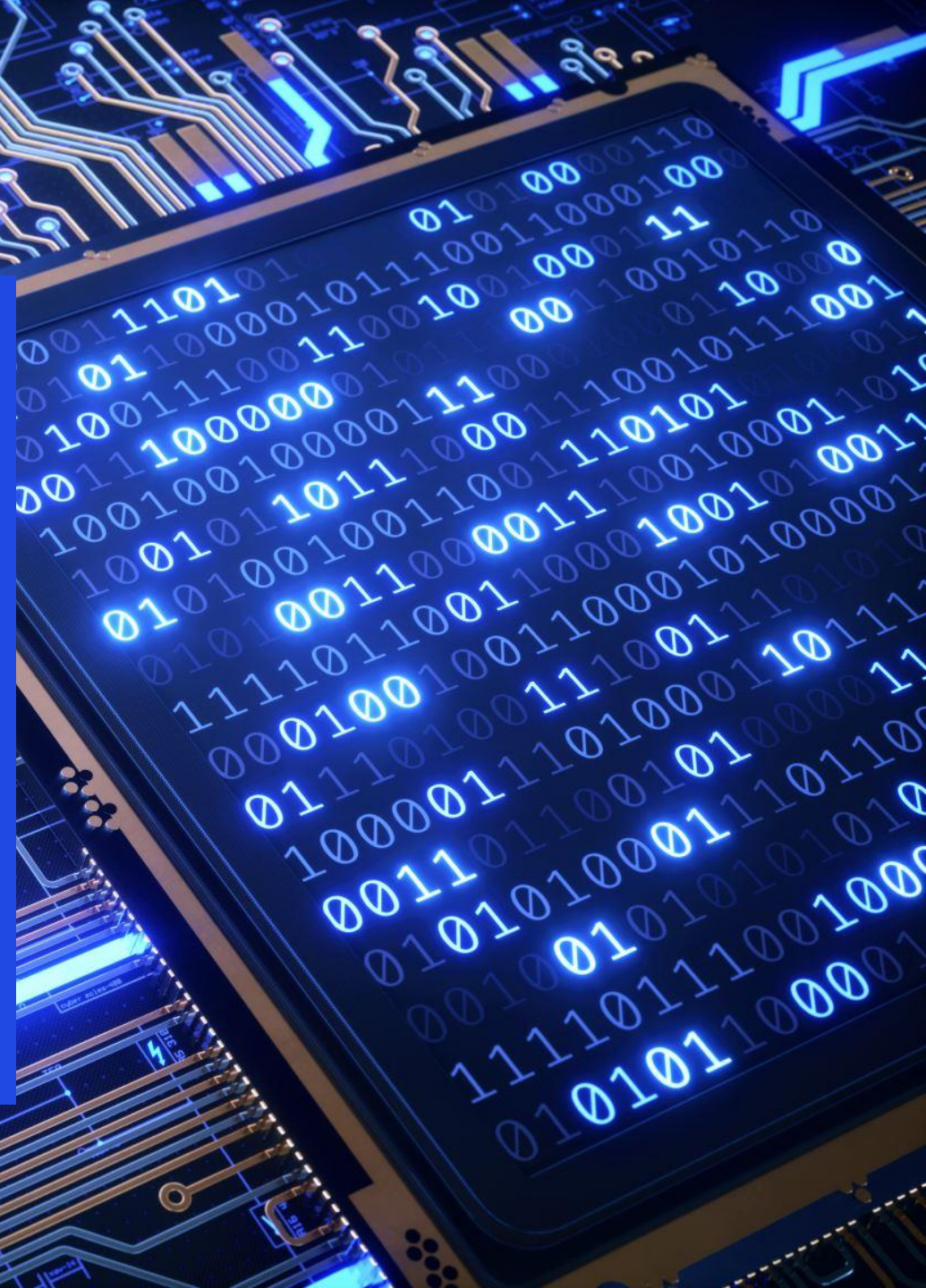
Agenda

08:30 a.m. – 09:00 a.m.	Registration and refreshments
09:00 a.m. – 09:05 a.m.	Welcome and introduction
09:05 a.m. – 09:20 a.m.	Key insights from KPMG on the global mega trends in life sciences in the Asia Pacific region and implications for Thai companies
09:20 a.m. – 09:40 a.m.	Data, digital and AI trends in healthcare and life sciences
09:40 a.m. – 10:00 a.m.	Modern sales and servicing with Salesforce for life sciences
10:00 a.m. – 10:30 a.m.	Discussion and Q&A
10:30 a.m. – 11:00 a.m.	Networking session





Welcome and introduction



Here with you today



Peter Liddell
Head of Life Sciences
KPMG in Asia Pacific
KPMG in Singapore



Matt Crane
Partner
Head of Healthcare and Life Sciences
KPMG in Thailand



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Director, Technology Consulting
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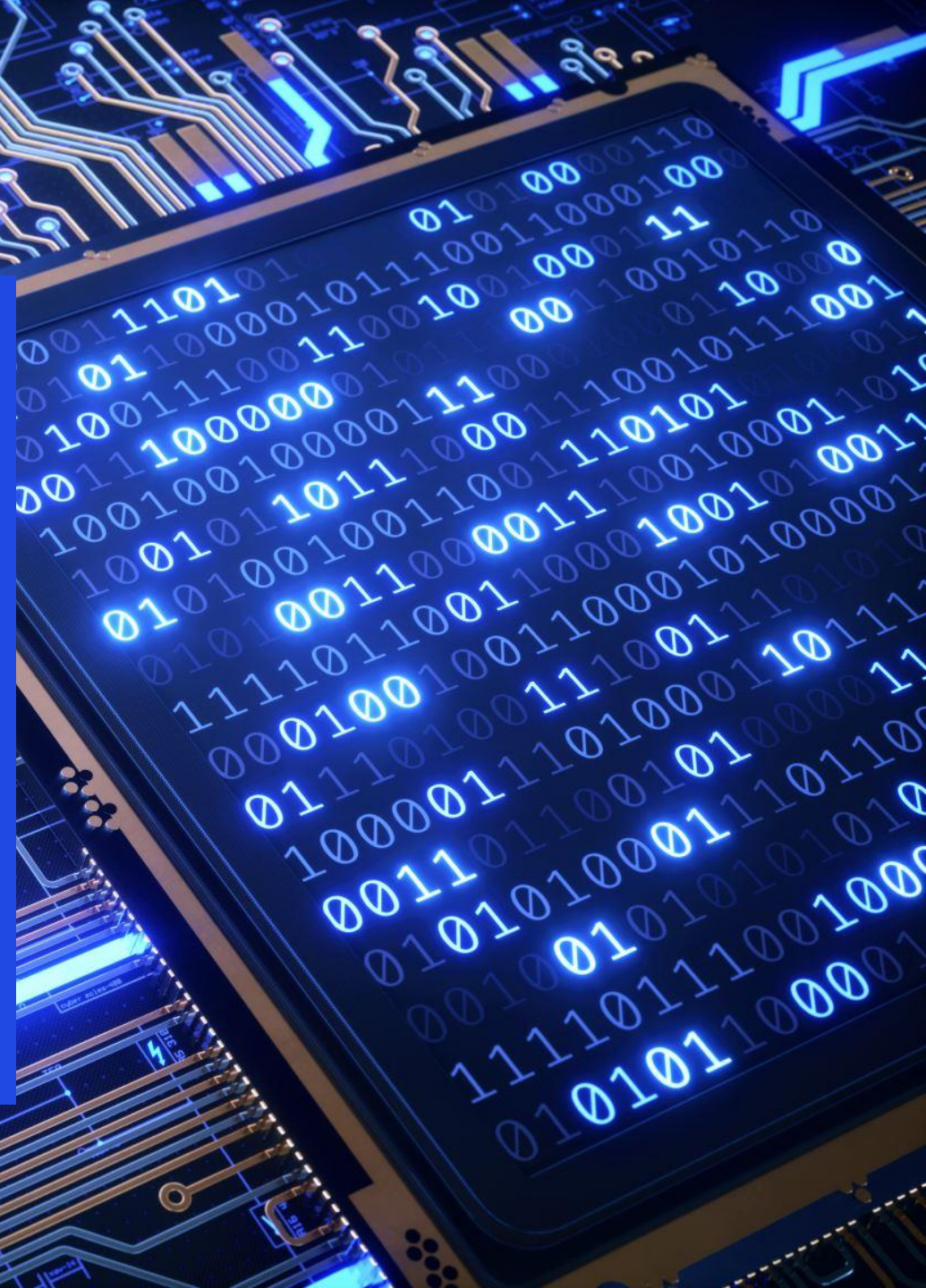
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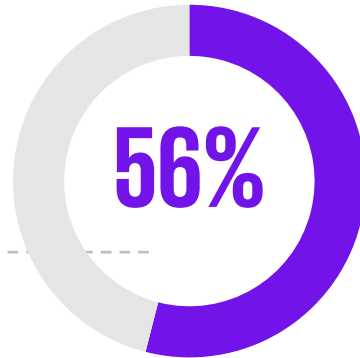
Global mega trends in life sciences in ASPAC



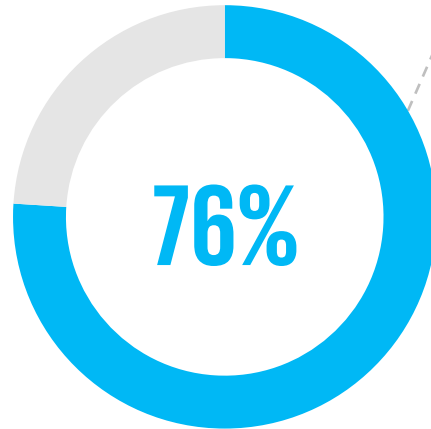
Insights from 2024 KPMG Life Sciences CEO Outlook

We surveyed 118 life sciences CEOs globally to ask them about the risks and challenges they face, their expectations for the next three years and the opportunities driving their businesses forward.

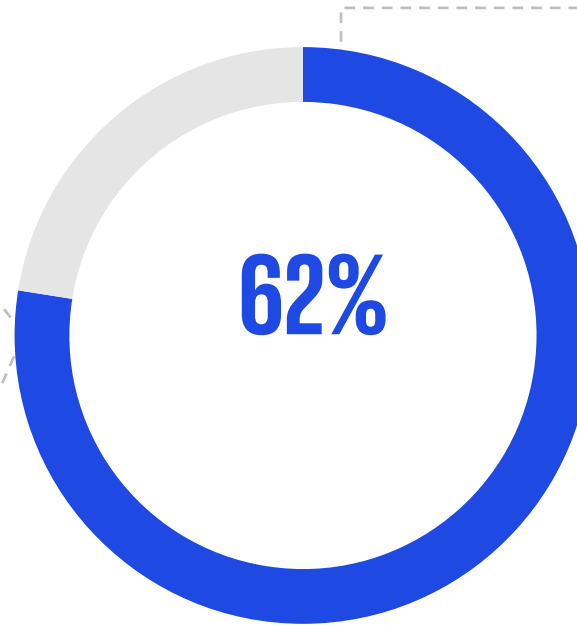
The majority of life sciences CEOs expect **anaemic growth over the next three years**. Fifty-six percent say they expect to achieve growth of less than 2.5 percent per annum.



Life sciences CEOs are worried about **supply chain disruption and trade regulation**. Supply chain disruption emerged as the top risk as ranked by life sciences CEOs. And more than three quarters expect trade regulation to have a major impact on their organization within the next three years.

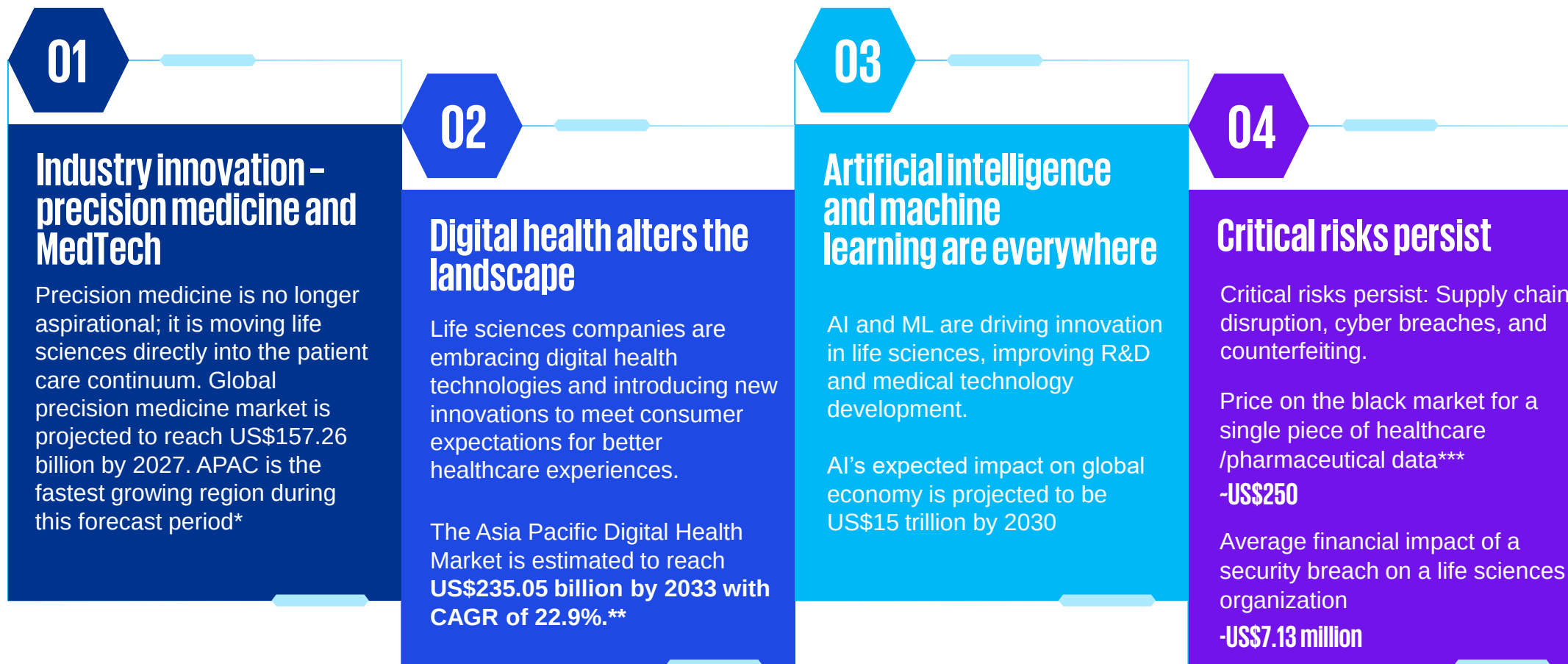


Sixty-two percent of life sciences CEOs say that **generative AI is a top investment priority for their organization, with profitability improvements cited as the top benefit**. Yet 53 percent say they are worried about the **ethical considerations** of the new technology.



Future growth will be driven by **digitalization and connectivity** across the business. Life sciences CEOs say they will be placing more capital investment into new technologies versus developing workforce capabilities. M&A will continue to be a major factor, but CEOs would like to see market conditions stabilize and the cost of financing fall.

Signals of change

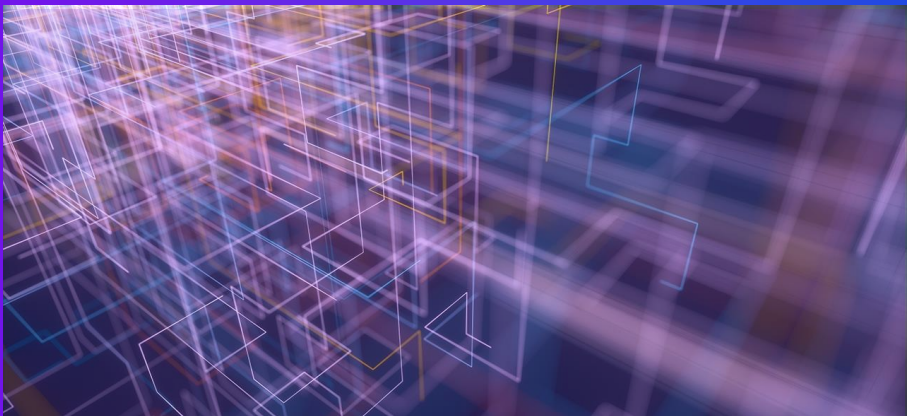


Source*: Precision Medicine Global Market Report. March 2023

Source**: SPER Market Research, .

Source***: Paul Nadrag, "Industry Voices — Forget credit card numbers. Medical records are the hottest items on the dark web," Fierce Healthcare, January 26, 2021.

Rising demand for personalized healthcare presents an unprecedented opportunity for AI in life sciences across APAC



OPPORTUNITIES IN APAC

The demand for personalized and efficient healthcare is on the rise, and the MedTech industry is booming with an enormous potential for the greater use of AI.

US\$1.4B

APAC Healthcare market size in 2023

US\$250M

APAC market size for AI in MedTech

50%

growth rate for AI in MedTech

However, the region faces several challenges as well:

1



Rapidly aging population

1 in 4

People in APAC will be aged 60 and above by 2030

2



Limited access to healthcare

700M

People in APAC lack the most basic healthcare support

3



Growing burden of disease

US\$250B

Economic burden of chronic diseases in APAC

4



Low healthcare expenditure

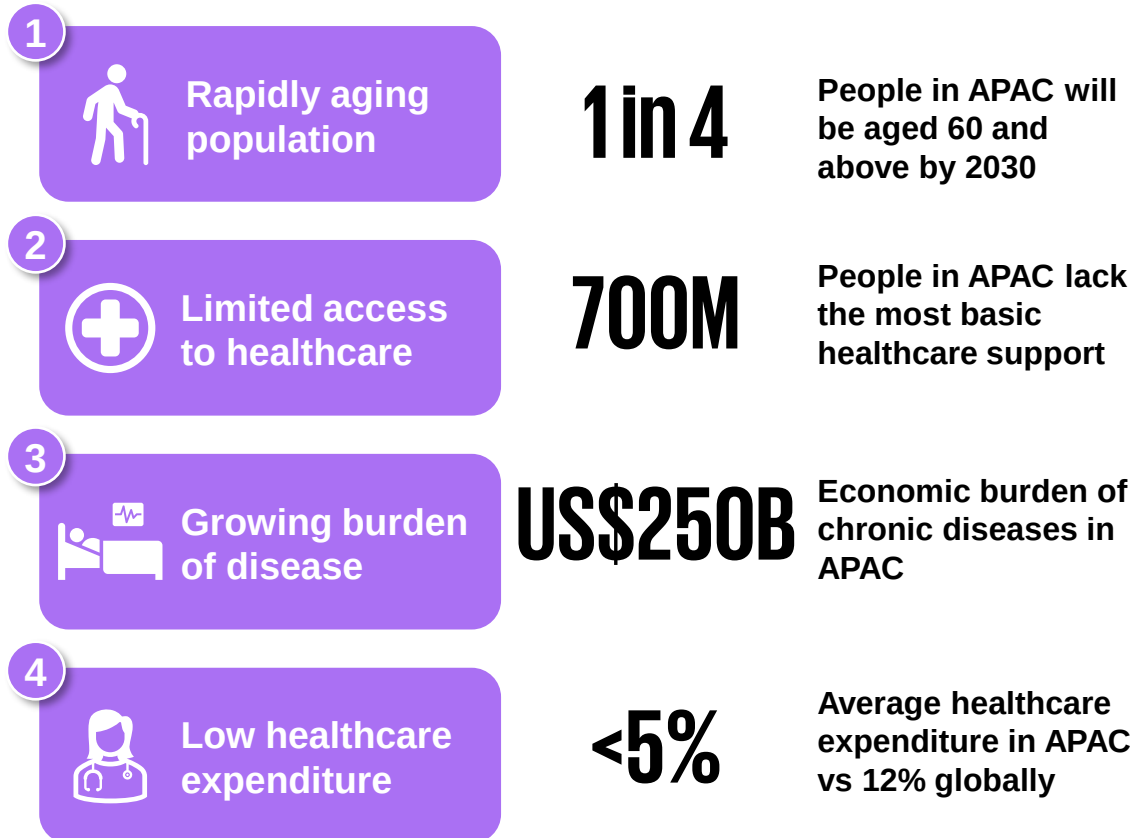
<5%

Average healthcare expenditure in APAC vs 12% globally

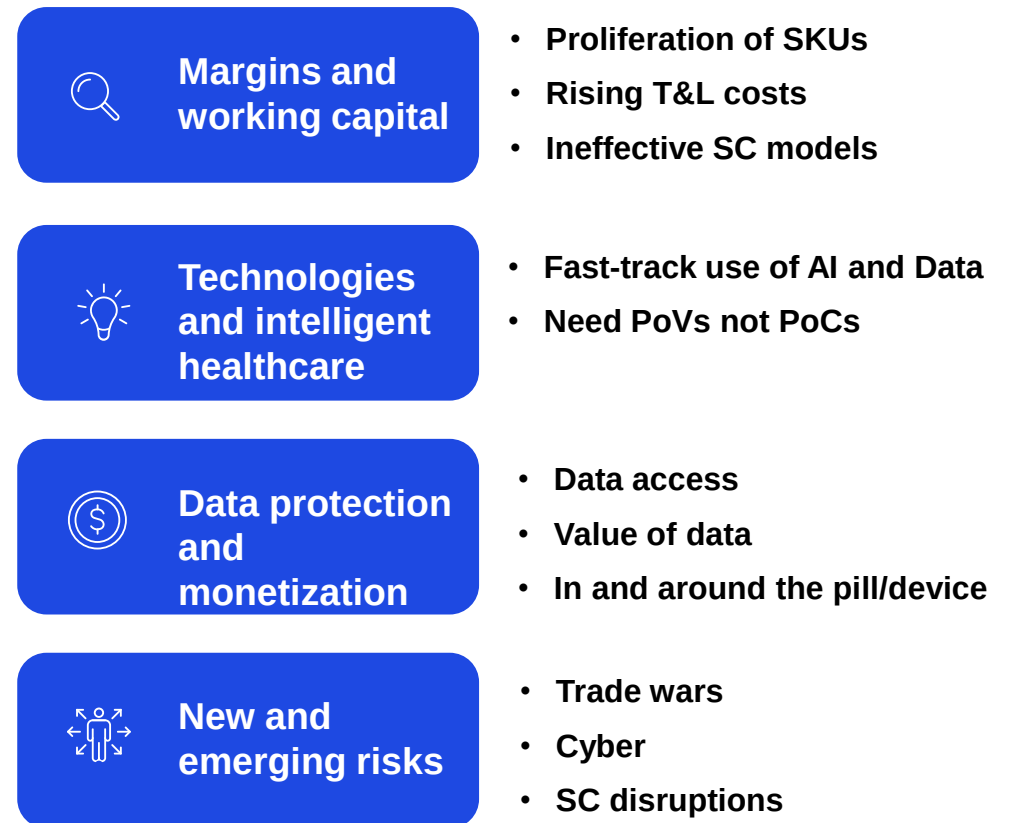
Source(s): APACMed, KPMG Thought Leadership, Grand View Research, Insights 10

Healthcare ecosystem challenges impact upon life sciences companies

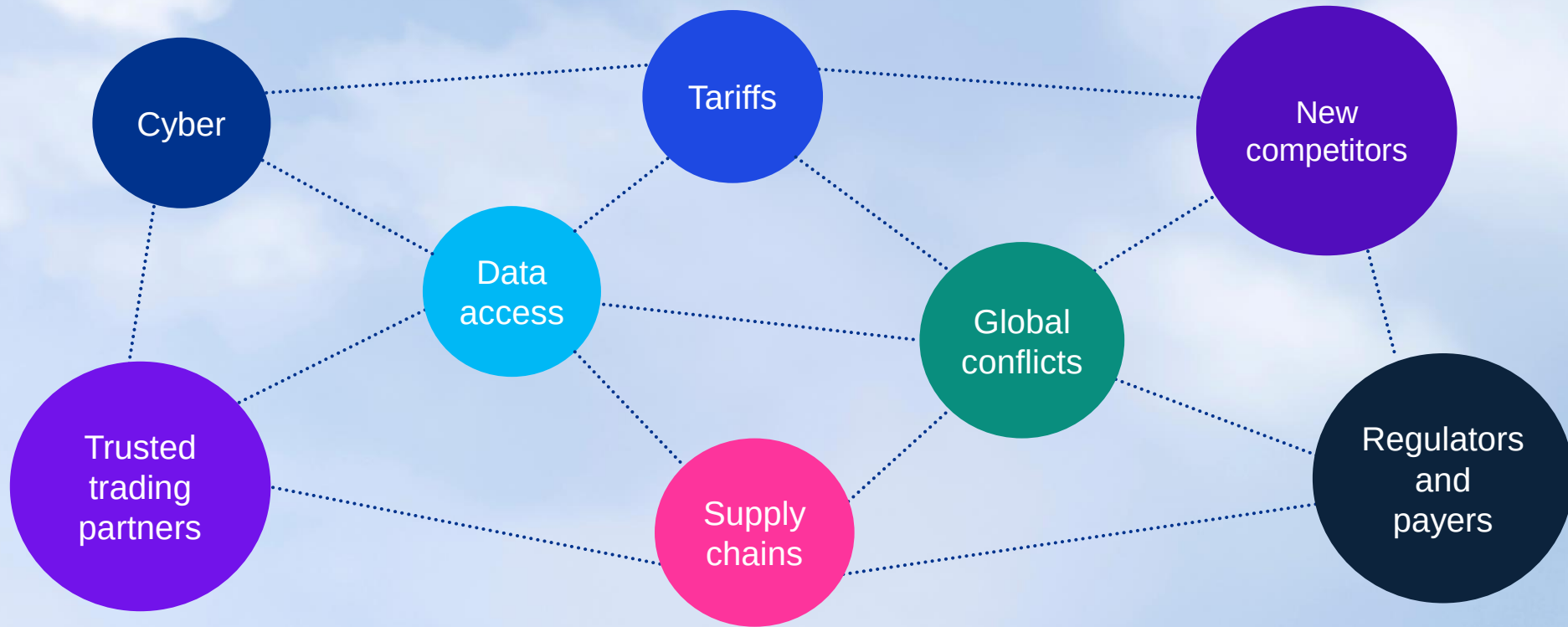
As critical suppliers, life sciences companies must respond



Impacts to life sciences companies:



New and emerging risks – interconnectedness



Strategic imperatives

Life sciences companies seeking to differentiate themselves from the competition should consider accelerating their journey toward increased connectivity. To succeed, life sciences organizations can focus on four strategic imperatives.



Source: Susan Moore, “7 Top Trends in Cybersecurity for 2022,,” Gartner, April 13, 2022.

Implications for Thai companies



Key implications for Thai companies

1

There is an opportunity for **Thailand to be a leading player in the future** of ASEAN Life sciences and healthcare.

2

BUT, there're significant risks Thailand will be left behind if we do not embrace changes and accelerate adoption of technology.

3

Many of these global risks and challenges are relevant to Thailand, including **ageing society, data readiness and supply chain** risks.

4

Knowledge, capability and insights from overseas needs to be leveraged to make this happen.

5

Financial support and stakeholder engagement is critical — across corporates (LS & HC), government, insurers and other stakeholders (e.g. multilaterals), including advisors and tech providers!

Data, digital and AI trends in healthcare and life sciences

Ana Miros
Head of Digital, Data and AI, Life Sciences
KPMG in Asia Pacific



The trends

Healthcare in APAC is under pressure to address key challenges in management and care delivery

01



Operational challenges

- 1. Talent shortages and retention**
 - Despite the growing demand for healthcare across APAC, the healthcare workforce is struggling to keep pace.
 - 27 countries in the APAC region showed that there are approximately 1.3 physicians/1000, lower than OECD average of 3.3, with the lowest being 0.2 in Cambodia and Nepal.
- 2. Facility scalability and standardization**
 - Expanding and upgrading facilities to meet the increasing healthcare demand in APAC while ensuring a consistent patient experience across locations is a significant operational challenge.

02



Clinical challenges

- 1. Adoption and integration of technology**
 - Integrating advanced technologies, such as artificial intelligence in fertility services, across markets with varying technological readiness and regulatory environments can be complex and may slow deployment.
- 2. Data overload**
 - Physicians are inundated with large amounts of lab results, vitals, and patient records, which can hinder timely, accurate decisions without proper filtering or support tools.

03

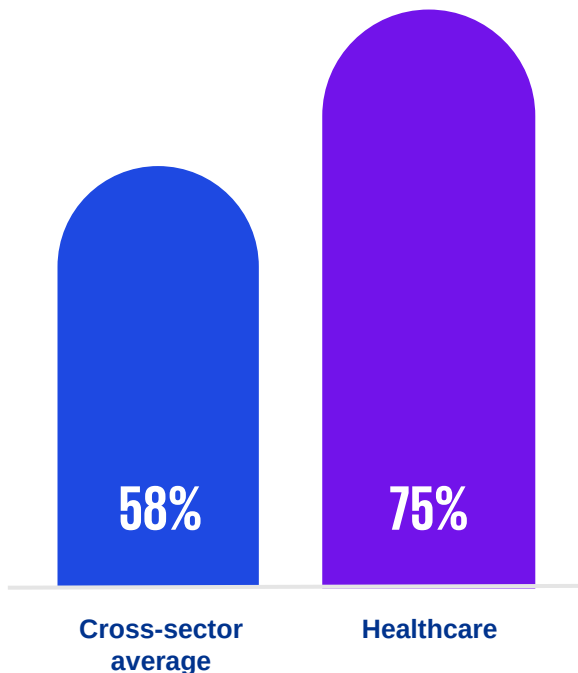


Financial challenges

- 1. Equity disparity**
 - Nearly 70% of workers in the LMI countries within APAC do not possess basic digital skills and there is disparity in access with high income countries ~4 hospital beds/1000 compared to 1.3 hospital beds/1000 in LMI countries.
- 2. Capex burden from tech investments**
 - Investments in digital transformation require high capital expenditures, impacting short- to mid-term cash flows.

Yet it is risk averse to change....

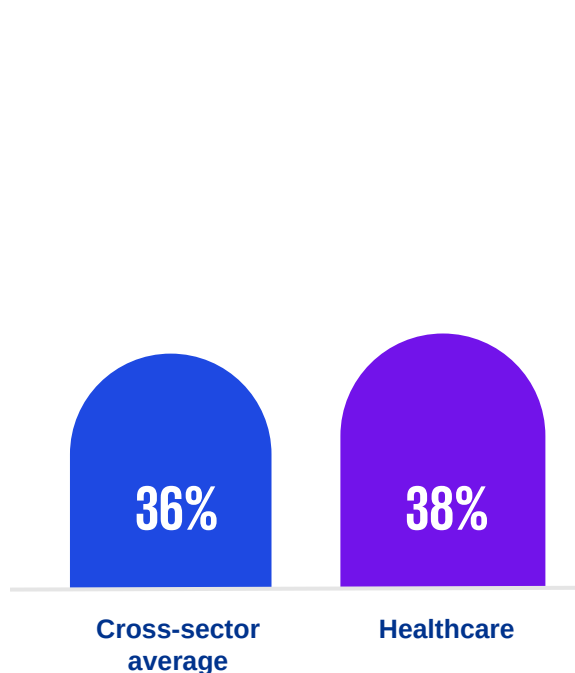
"Employee resistance influences our investment decisions with new technologies."



Q. To what extent do you agree with the following statement?

Employee resistance influences our investment decisions with new technologies.

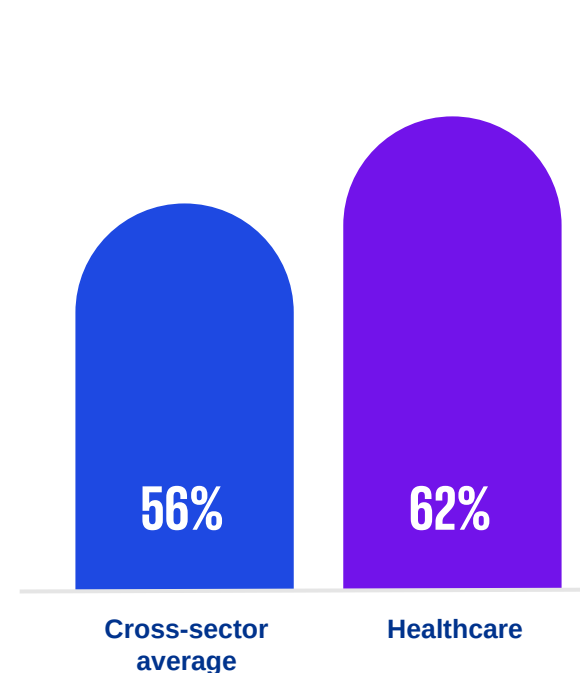
"A risk-averse culture that is slow to embrace change"



Q. Which of the following challenges are most likely to slow down your transformation?

A risk-averse culture that is slow to embrace change

"Risk aversion frequently makes senior leadership move more slowly in embracing new technology."



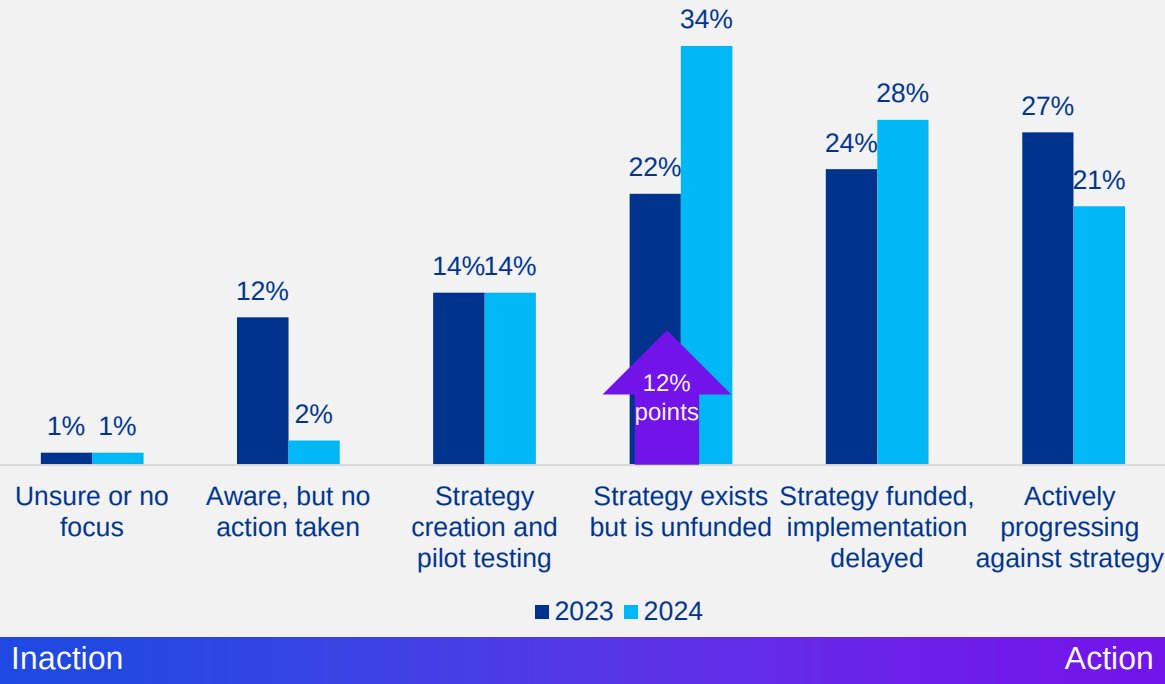
Q. How often do the following situations occur within your business?

Risk aversion makes senior leadership move more slowly than our competitors in embracing new technology.

....and continues to underspend on innovation

Current stage of data strategies across healthcare organizations

While many healthcare organizations are actively developing or have already established strategic visions for data and analytics, **limited funding and implementation challenges** continue to hinder the sector's ability to fully realize these initiatives.



Barriers to tech investment



Cybersecurity and privacy concerns

Healthcare organizations are increasingly targeted by cyberattacks, posing a significant risk to patient data and system integrity.



Transformation fatigue

Implementing digital tools often requires changes to existing workflows, which can be disruptive and time-consuming for healthcare professionals.

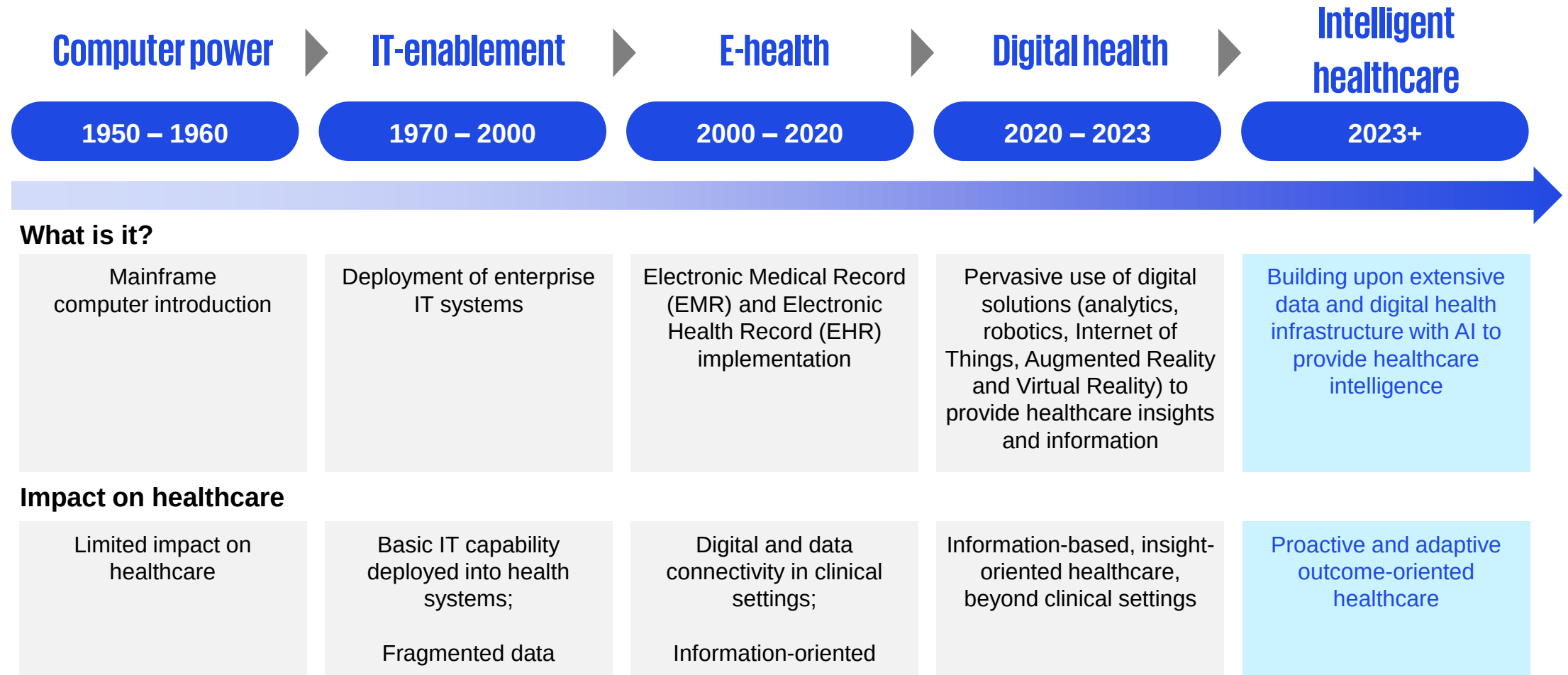


Immature data management strategies

Healthcare organizations may lack the necessary IT infrastructure, including reliable internet access and robust security measures, to support digital transformation initiatives.

The potential

Intelligent healthcare expands on the 'information age' of digital, data-driven healthcare by integrating AI across the value chain



Sources: KPMG [*'Realizing the value of AI in MedTech within Asia Pacific' Whitepaper*]

2025 – the year of agentic AI, the ‘third’ AI wave

Top 5 Gartner trends in 2025

#1

Agentic AI

Shifting to autonomous decision making on specific task to achieve a specific outcome

FOCUS

60%

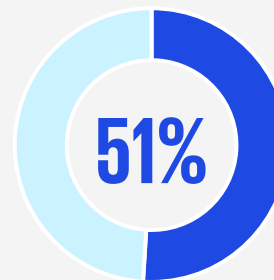
Focusing on administrative duties (operational optimization) use cases

OUTCOMES

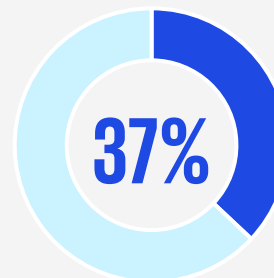
79%

Focusing on productivity for ROI (and 73% on profitability)

KPMG AI Quarterly Pulse Survey: 2025 is the year of agentic AI

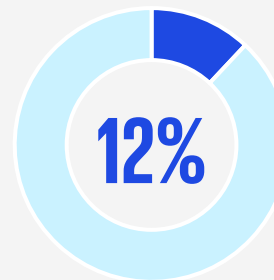


Exploring AI agents



Piloting AI agents

But...



Deployed AI agents

Source(s): Gartner, KPMG Quarterly AI Pulse Survey

AI Agents are being integrated across the healthcare continuum

 Autonomous Clinical Triage and Referrals	 Administrative Load Reduction	 Clinical Decision Support	 Surgery Assistance	 Patient Support
<i>Agentic AI routes patients to the appropriate care level based on symptom severity and history</i>	<i>Agentic systems assist administrative work such as information retrieval, note taking and documentation preparation</i>	<i>AI agents can analyse vast datasets and make decisions autonomously, driving predictive analytics and enhancing patient care</i>	<i>Agentic AI enhances robotic-assisted surgery by enabling surgeons to perform minimally invasive and precise procedures</i>	<i>Generative-AI-powered agents can conduct low-risk, non-diagnostic, patient-facing services</i>
Example: - LIV by Sheba Medical is AI-powered tool designed to revolutionize psychiatric triage – This agentic AI enables initial screenings for individuals grappling with post-conflict mental distress - LIV has achieved accuracy level of 94% and has resulted in 5x faster diagnosis and treatment since implementation	Example: - Dragon Copilot is an AI clinical assistant embedded in clinical workflows to support physicians in real time in administrative tasks during patient visit - With Dragon Copilot, each physician can save 5 mins per patient encounter with 70% reported reduction in burnout and fatigue	Example: - VoxelPrompt is the first AI agent in medical imaging that dynamically plans, executes, and adapts using external computational tools - It demonstrated 89% accuracy in pathology characterization across different brain regions and surpasses conventional vision models on 23 different brain regions	Example: - CMR Surgical pioneers agentic AI solutions for surgery assistance through robotic platforms. - Versius, an AI-driven robotic system by CMR Surgical enhances surgical precision, manoeuvrability, and visualization, resulting in 43% increase in number of thoracic patients offered minimal access surgery	Example: - Hippocratic AI is an AI-powered agents for patient-facing services, focusing on enhancing patient engagement, communication, and support - Agentic AI provides 99% correct advice as opposed to 81% by human nurses with no advice leading to severe harm or death
Faster patient intake	Reduced burden on physicians	Faster and more accurate diagnosis	Optimised surgical plan and outcomes	More efficient follow-up

The Current State

Yet, with unprecedented opportunity, comes unprecedented risk

Technology level



Hallucinations

GPT is known to not admit to mistake unless prompted, therefore, keeping AI in the loop via AI-Clinician-Patient triad for shared decision making is crucial .



Accountability ('symbiotic' not 'replacement')



Ingestion

e.g. limits on length and type of data ingested



Data representation and bias

Open-source vs private, representation of social/demography and bias on underrepresented groups, e.g. rare diseases, minority populations



Data currency



Privacy and cybersecurity



Ethics



Memory

e.g. instances where the model won't recall prior sessions interacting with patients/'point in time' recollection

System level



Bias

Encoding bias (potential of poor data quality or bias of the data for training or re-training) and automation bias (may overlook errors from the AI due to over-reliance)



Overestimation

Ecosystem stakeholders and patients risk being overly 'bullish' on AI and overlooking (or may even not know) the risks



Exposure

System over-reliance and dangerous AI (malicious AI)



Access

Usability and knowledge (AI risks exacerbating the digital divide), financial (models and data sources will likely 'sit behind a paywall')



Capability

Skills readiness (requires an ecosystem-level upskilling to address the skills gap for the entire healthcare ecosystem) and skills degradation ('over-utilization' of AI resulting in skills degradation in companies and clinical settings)

Source(s): KPMG Analysis



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...and unique considerations when looking at translation into healthcare

The risk

Healthcare is risk, not opportunity based (like many other sectors); where healthcare is richly punished for poor outcomes and poorly rewarded for improving outcomes.

The debt

Massive tech debt that has largely unchanged over decades and remains fragmented with limited interoperability and standardization

The reactive reality

Care is reactive instead of proactive due a bias towards willingness to pay for reactive acute care (when the problem presents/corrective action) versus preventative actions.

The liability

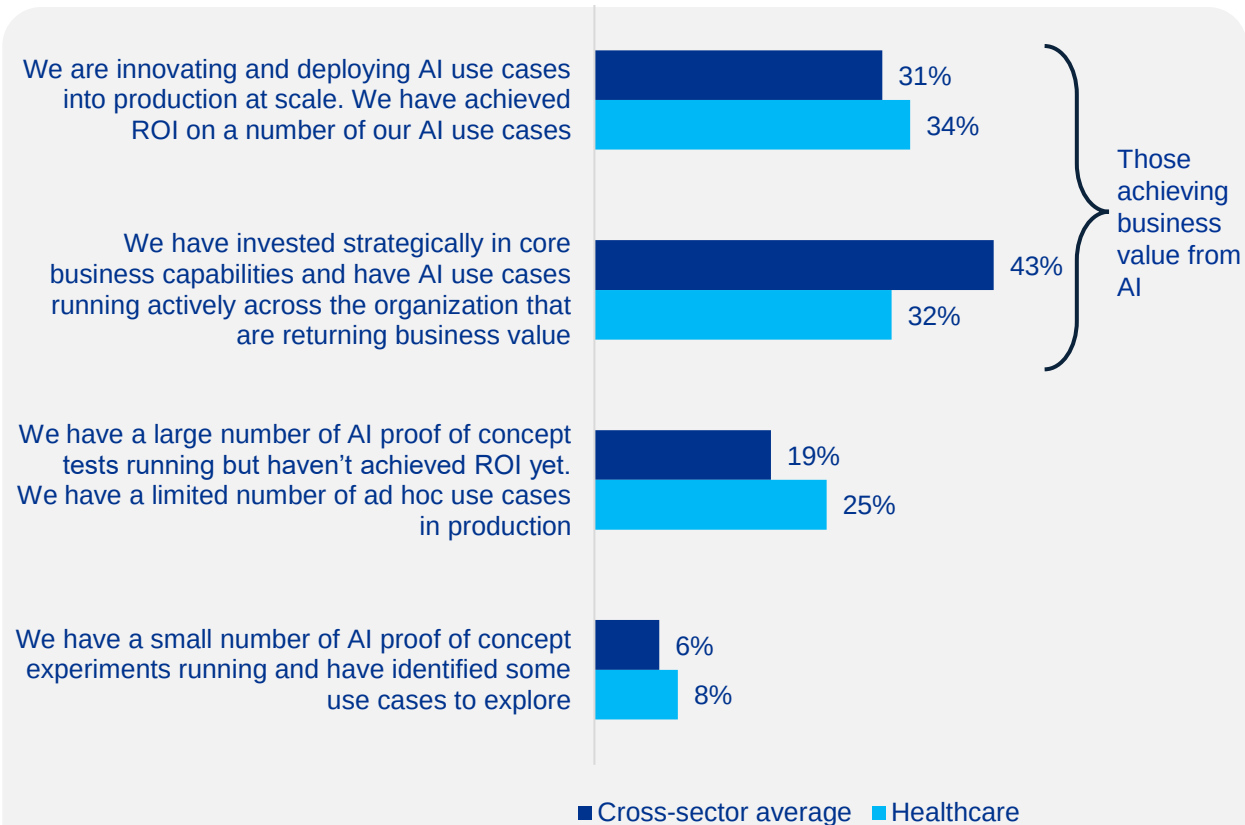
Providers are burdened with healthcare liability which results in added caution when introducing new technology and digital tools.

The non-standard standard

There is a non-standard standard of care which is difficult to change/has long standing history.

...stuck in PoC purgatory and demonstration of ROI

AI maturity levels across organizations



Q: Which of the following best describe your organization's current maturity level with AI adoption?

Key insights

1. Healthcare organizations are scaling AI and reaping its ROI

- 32% of healthcare organizations have invested strategically and are running active AI use cases
- 34% have achieved ROI, which is higher than the cross-sector 31%, implying that many initiatives are translating into measurable value

2. More healthcare organizations are stuck at the PoC stage

- 25% of healthcare firms are stuck at the PoC phase without ROI, compared to 19% cross-sector
- This suggests healthcare organizations may be more selective in what gets past PoC, or there maybe challenges faced to advance into production

3. Healthcare is pushing through early exploration

- A small proportion of healthcare organizations (8%) are in the very early stages, showing some momentum in moving past the exploratory phase

We've seen the successes...and the failures

Neglecting the return of investments

Users does not equal revenue

Key challenge:

- Reaping return of investments (ROIs) of a product is a complex challenge, as the emphasis on users can sometimes overshadow the critical role of ROIs.
- Companies often focus on user experience but fail to consider ROIs.

Case study: Pear Therapeutics

(Unsuccessful)

Background

- Pear Therapeutics developed a digital therapeutic for addiction treatment, offering FDA-approved prescription software as a treatment for substance use disorders.

The issue

- While patients and doctors appreciated the technology, insurers were unwilling to reimburse software like they would for traditional drugs.

Outcome

- Without insurance coverage, Pear struggled to generate revenue. In 2023, the company filed for bankruptcy after failing to secure sustainable reimbursement pathways.

Takeaways

- Real world success requires early financial and non-financial impact analysis.
- Before launch, secure buy-in from payors if required.

Multiple stakeholder involvement

Providers' leadership and practitioners have to be onboarded

Key challenge:

- Hospitals have multiple decision-makers (*doctors, compliance, management, etc.*) with differing priorities.
- By the time approval is secured, funding may run out, competitors may pivot, or key internal champions may leave for other hospitals.

Case study: Epic Systems

(Successful)

Background

- Epic Systems, an electronic health record (EHR) company, faced a fragmented and competitive market when hospitals were adopting digital records.

Their solution

- Epic aimed for long-term enterprise contracts with large hospital systems, and was able to secure hospital-wide adoption.

Outcome

- Epic won long-term enterprise contracts by making its EHR deeply embedded in hospital workflows, ensuring hospitals had little incentive to switch to competitors.

Takeaways

- To succeed in technological implementation, institutional buy-in from multiple stakeholders such as IT, compliance, and finance teams must be secured, not just end users.

Workflow integration challenge

Doctors will not adopt workflow-disrupting technologies

Key challenge:

- Healthcare professionals already face significant challenges with inefficient EHR systems and administrative tasks.
- The addition of extra clicks, logins or manual data entry further hampers adoption and reduces overall efficiency.

Case study: IBM Watson Health

(Unsuccessful)

Background

- IBM Watson Health was marketed as a groundbreaking AI-driven platform that could assist oncologists in diagnosing and recommending treatments for cancer.

The issue

- Despite the promising technology, the platform struggled to integrate with hospital workflows and EHRs, requiring oncologists to manually switch systems and reconcile data, leading to low physician adoption.

Outcome

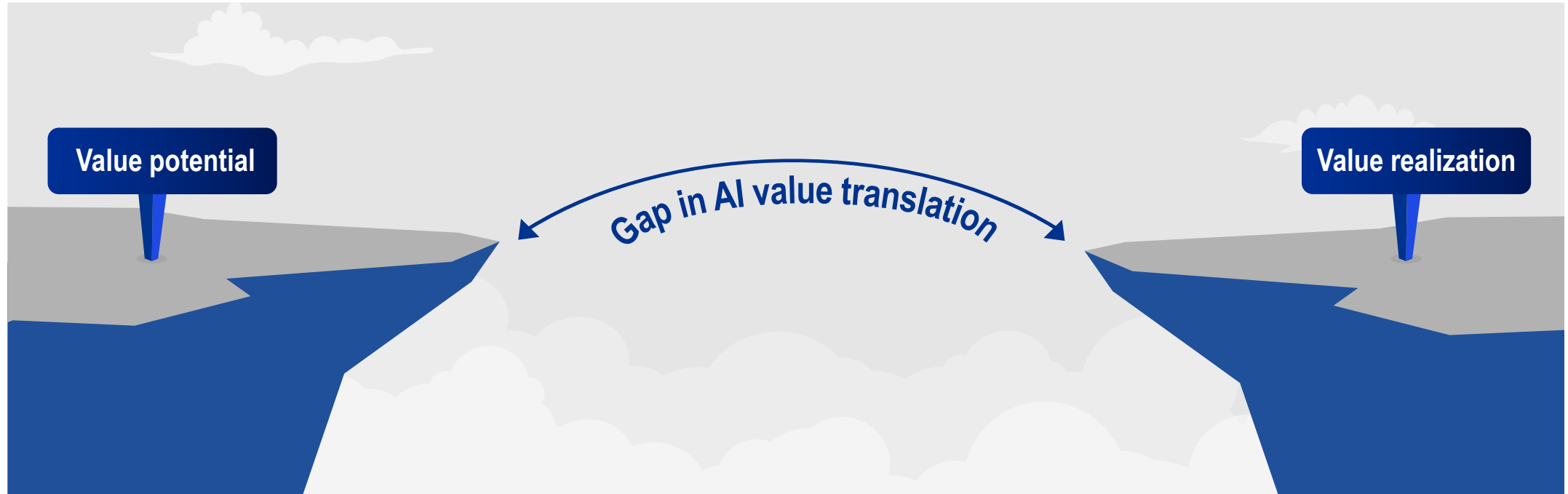
- Low adoption and credibility issues led to IBM selling its Watson Health division.

Takeaways

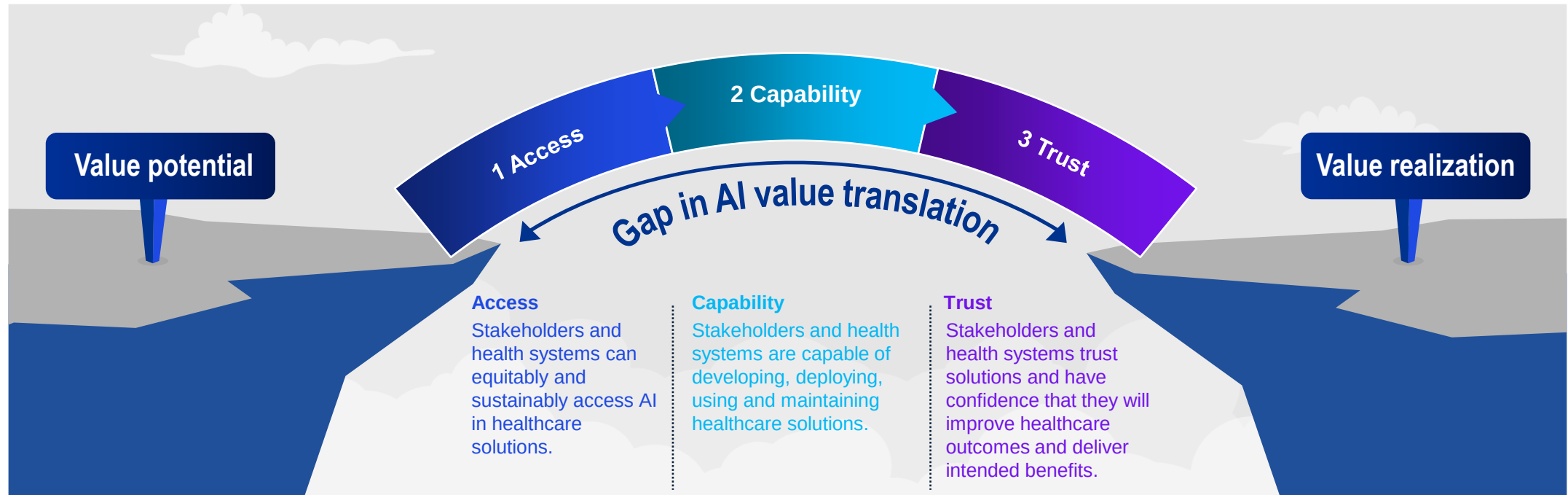
- Adoption happens when technology fits into existing workflows.
- Healthtech products must integrate seamlessly with EHRs, billing systems and workflows to achieve adoption.

The Gap

There is a gap when translating and realizing the potential value of AI and digital health in Healthcare



Three key areas are critical for bridging the gap from potential to value realization: access, capability and trust



Fortifying access, capability and trust ensures AI translation and outcomes in healthcare, enabling the future of intelligent healthcare

What this area seeks to explore...

Access

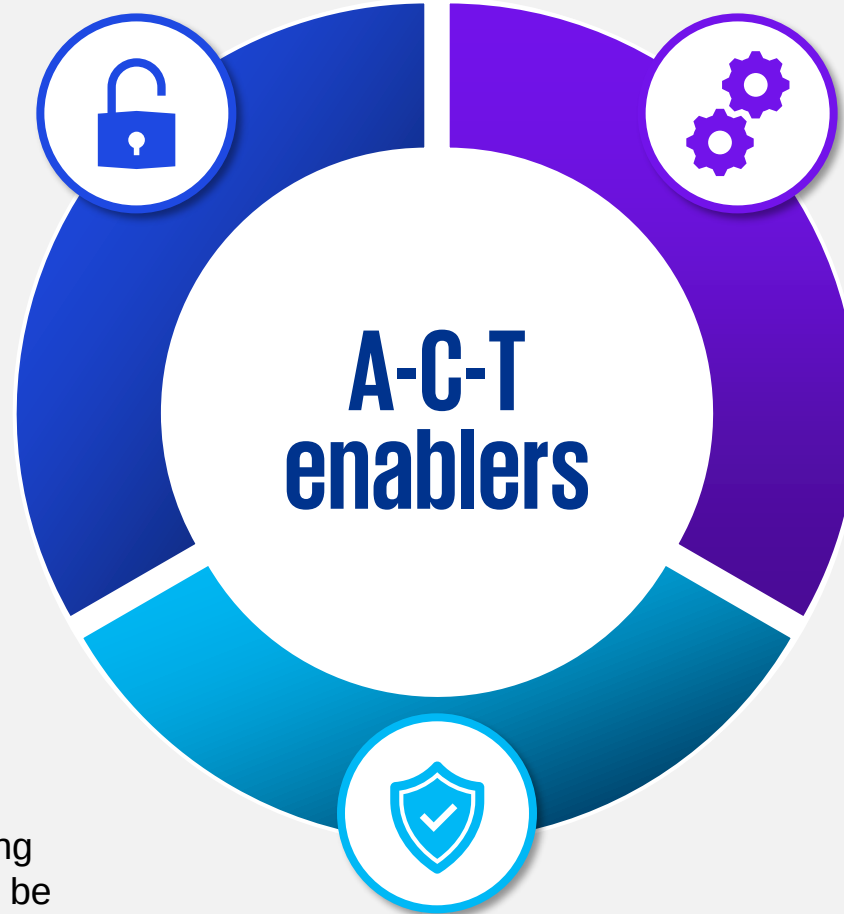
Reimbursement and funding required to enable AI to be designed, deployed, adopted and utilized. Equitably.

Capability

The skills and infrastructure needed to develop/commercialize AI into healthcare

Trust

Confidence that AI will deliver the intended outcomes while minimizing risk. The solution helps healthcare be faster, better, cheaper and safer.



Why is it important for healthcare commercialization...

Access

Ensure access to financial support across the innovation translation lifecycle

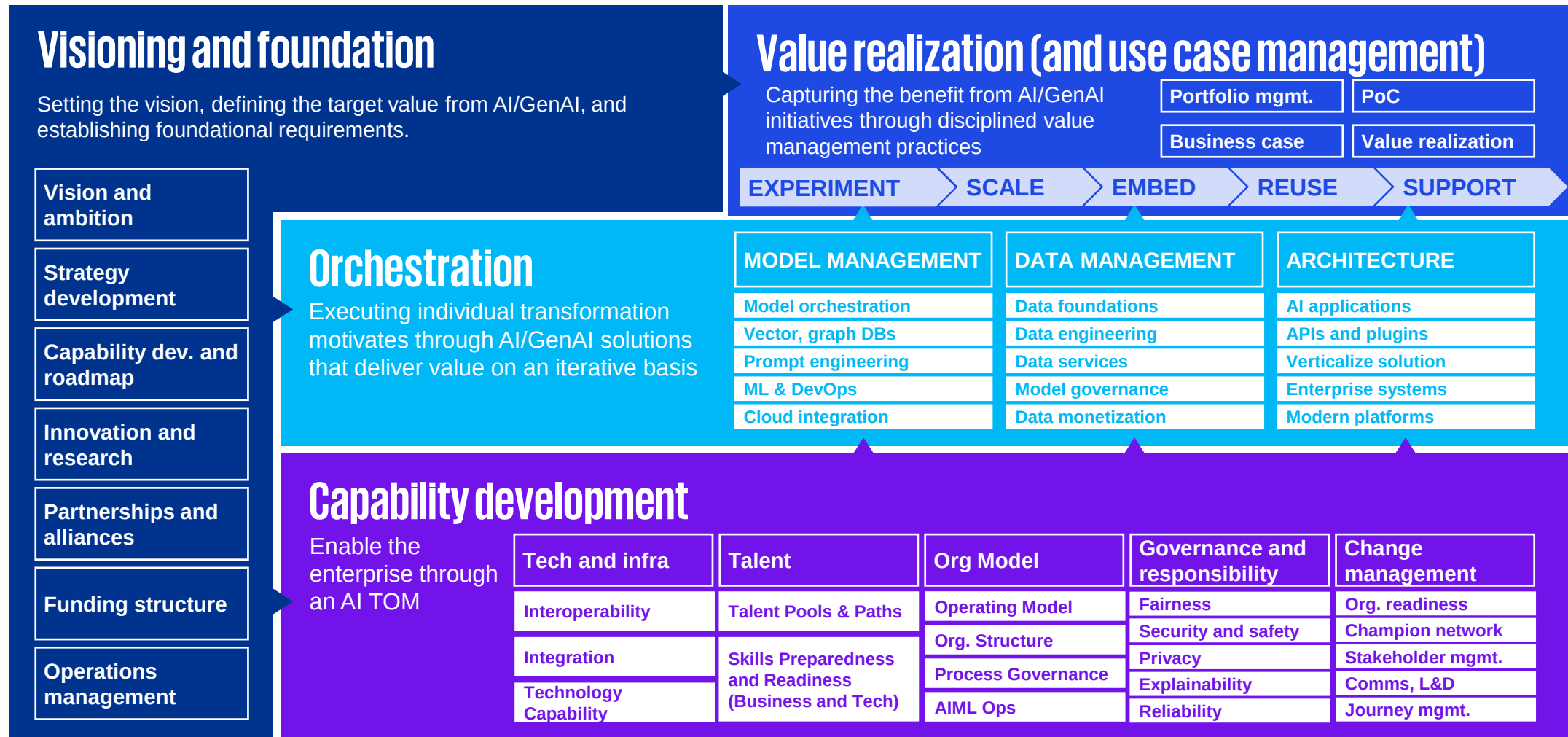
Capability

Equip the ecosystem with the right skills and capabilities for developing and bringing new products to market

Trust

Build confidence that AI meets safety, efficacy and ethical standards and local needs

Enabling A-C-T across the AI translation pathway from vision to value



**Where to from
here?**

Key steps to deliver the future of intelligent healthcare

01**The Big B**

Understand whose and how many behaviours have to change to achieve the vision; regulators, patients, clinicians, hospitals, insurers, policy-makers. What's their willingness to invest (time/money), act and perception of value?

Trust**02****Collaborate to accelerate**

Don't go at it alone. Look at partnerships to accelerate scale and strengthen business model. Are you competitors collaborators, or collaborators competitors?

Capability**03****Challenge the status quo**

Draw inspiration from global models and practices to re-imagine care models. The demographic is changing (lifespan != healthspan). We can't assume prior models are fit for purpose in the face of changing needs.

Access**04****Create value, realize value**

Undertake diversified initiatives to create value (e.g. PoCs) but don't overlook developing capability (workforce, interoperability and infrastructure, systems and commercials) to ensure value created...can be realized

Capability**05****Know your 'standard' competition**

How does the solution integrate or change the current (non-standard) stand of care, offering a solution that's easier, safer and more cost-effective than existing standards-of-care

Access

Scan the below to learn more!

‘Healthcare Horizons Revisited’ Thought Leadership:

Scan to download
the full report



‘Realizing the Value of AI in MedTech within Asia Pacific’ Whitepaper:

Scan to download
the full report





Modern sales and servicing with Salesforce for Life Sciences



Open discussion and Q&A

Please give us the feedback
to improve our services





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Salesforce for Modern Sales and Servicing

Navigating Challenges in Today's
Pharma and MedTech Landscape



Our data is trapped in **disparate systems** and **data silos**

salesforce

#7 Employees jump between 7 systems daily

78 Average number of systems used by today's Pharma companies





The Pharma and MedTech Industries continue to see change



80%

“Doing More With Less”
primary focus for 80%
of HLS organizations

Drive Efficiency

85%

Compound annual
growth rate through
2027 for AI in
healthcare

AI Growth

30%

Of the world's data is
generated in health

\$866B

Increased Competition as
the global market
expected to grow by 2033

**Enhance Overall
Business Functions**

50%

of physicians say they
prefer all or mostly
virtual engagement

**Improve
Customer Trust
and Satisfaction**





The complexity we have

Time consuming tasks

Outdated engagements

Data and organizational silos

Lack of transparency

64%

of senior health leaders say inadequate data is a large barrier to AI adoption

Source: Applications of AI in Health & Life Sciences, 2024 Study

salesforce

The connections we want



Efficient processes

Personalized engagements

Intelligent health experiences

Empower patients and teams

58%

of workers say AI-powered automation can address burnout

Source: UiPath Survey: Automation Generation Report, 2023

Transforming MedTech

Data-Driven Customer Prioritization
with Agentforce, from Salesforce

Enable seamless collaboration with
unified **data**

Automate operations for efficiency,
address the “do more with less” challenge

AI-Powered personalized engagements
across channels

HOLOGIC®
The Science of Bone

Boston
Scientific | ottobock.

salesforce

Search...

Treatment Center Coordinator Care Program Enrollee Charles Scott Request Slots

Therapy Name: Gene Therapy Name 1 Transplant Center: Boston Cell and Gene Therapy Center Select Phase: Apherisis Infusion Therapy Start & End Date: 08/10/2022 12/10/2022

> Advanced Search (0)

Look what we found for you!

1. Screening 2. Blood Collection 3. Apheresis 4. Manufacturing

Cancer Institute Makana Clinic Makana Clinic Biopharma Inc

Wednesday 17 Aug Starts In 1 Day

Wednesday 14 Sept

Wednesday 21 Sept

Thursday 12 Oct

Thursday 18 Aug Starts In 1 Day

Friday 19 Aug Starts In 2 Days

Thursday 15 Sept

Friday 16 Sept

Friday 13 Oct

Wednesday 2 Nov

Wednesday 9 Nov

23% Reduction in time spent on manual tasks (% time saved)

Interactions must be personalized for improved patient outcomes

salesforce

Precision medicine

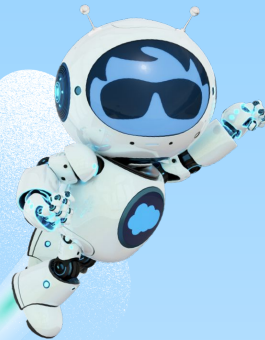
81% of oncologists view cell and gene therapies as crucial for treatment and lasting remission

Connected and unified teams

86% believe it's critical to address the entire care continuum with 'total' solutions across the company

Next-gen engagement

70% of HCPs engage digitally at least once per month



Patient-centricity

75% envision greater patient outcomes as a result of AI-powered, personalized services & support programs

Thank You

To connect with me:



To find out more:

