

HCP INTERACTIONS IN A CV-19 WORLD

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COVID-19 has radically altered the landscape of HCP interactions with patients and pharmaceutical companies

To help clarify the types, breadth, and depth of these changes, Ipsos Healthcare is conducting research with healthcare providers (HCPs).

We want to understand how physicians' behaviors and perceptions are changing, particularly in how they interact with pharma companies & with their patients.

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METHODOLOGY

Ipsos conducted n=311 online surveys with HCPs in the US: March 26 to April 2, 2020.

Specialty	# of Completes
Allergists	n=29
Rheumatologists	n=24
Neurologists	n=50
Psychiatrists	n=50
Endocrinologists	n=40
PCPs	n=50
Dermatologists	n=25
Oncologists	n=43
TOTAL HCPs	n=311

Each HCP assessed up to 3 recent e-details, resulting in 642 e-details being evaluated.

Respondents recruited through M360 panels and all self-report they:

- ✓ spend at least 75% of time in patient care
- ✓ allowed sales reps in-office prior to COVID-19
- ✓ participated in at least 1 e-detail in the past two weeks.

e-detail defined as "any non-personal interaction with a pharmaceutical sales representative or company, such as a telephone call, videoconference (Slype/FaceTime), online video, etc."

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CHANGING PRACTICE DYNAMICS

COVID-19 has already had a dramatic impact on the lives and practices of HCPs.

HCPs are seeing roughly half as many patients per week as before COVID-19.

Specialty	Prior to COVID-19	Now
Overall	45	102
PCP	77	135
Oncologist	65	68
Endocrinologist	47	101
Neurologist	38	92
Rheumatologist	46	116
Allergist	56	99
Psychiatrist	47	80
Dermatologist	30	150

Practices are changing due to COVID-19, with sudden and broad adoption of telemedicine.

Practice Change	Percent Reporting
Taking patient visits using telemedicine	80%
Postponing non-urgent patient visits	73%
Postponing diagnostic tests for some patients	61%
Reducing the number of support staff	50%
Reducing the number of nurses on staff	36%
Postponing surgery for some patients	34%
Cancelling surgery for some patients	27%
Switching patients from treatments that impact their immune system	26%
Actively testing patients for COVID-19	23%
Reducing the number of physicians on staff	21%

COVID-19 has also impacted logistics.

HCPs report that 16% of their patients have had difficulty filling scripts since COVID-19.

55% of HCPs report having difficulty sourcing general medical supplies.

Source: Ipsos Healthcare HCP Research, n=311 HCPs surveyed March 26 - April 2, 2020

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THE RISE OF TELEMEDICINE

COVID-19 has forced the rapid and widespread adoption of telemedicine. But it is likely that telemedicine, in some form, is here to stay.

Prior to COVID-19, some sources indicate only 10% of HCPs had seen patients via telemedicine. Now it is most HCPs.

Specialty	Percent of HCPs using telemedicine
Overall	80%
Allergist	90%
Rheumatologist	88%
Neurologist	88%
Psychiatrist	84%
Endocrinologist	83%
PCP	80%
Dermatologist	76%
Oncologist	69%

And this shift has been dramatic.

Specialty	Percent of patient visits that are telemedicine
Overall	67%
Allergist	51%
Rheumatologist	66%
Neurologist	66%
Psychiatrist	76%
Endocrinologist	64%
PCP	61%
Dermatologist	58%
Oncologist	51%

The extent to which HCPs and patients will rely on telemedicine creates a new paradigm, bringing many new questions.

Over the coming months, we expect there will be a wide range of telemedicine experimentation.

Source: Ipsos Healthcare HCP Research, n=311 HCPs surveyed March 26 - April 2, 2020

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THE TRANSITION TO E-DETAILING

E-detailing is important and can be very effective.

COVID-19 has stopped almost all in-person detailing, but most HCPs seem receptive to e-details.

Detailing Type	Rep visits per month
In-Person Rep Visits	16
E-Details	1

62% of HCPs now allow online or telephone details

But 38% of HCPs have simply eliminated seeing reps at all (and they were seeing reps prior to COVID-19).

HCPs still prefer to interact with pharma companies via sales reps, and many cannot name a manufacturer who does e-detailing well.

Channel	Preference (100 point allocation)
Sales reps	35
Conferences	12
Speaker programs	10
MSLs	9
Email	8
Journal ads / articles	8
E-detailing	8
Direct mail	5
Pharma manufacturer website	4

42% of HCPs cannot think of a manufacturer that has effective e-detailing interactions

HCPs report few recent invitations to e-details. Those who had e-details rate them as highly effective.

HCPs report receiving an average of **3 e-detail invitations** in the past two weeks.

Efficacy of e-details (among 642 e-details HCPs evaluated)

Efficacy Rating	Percentage
Very Effective (Top 2 Box)	57%
Not Effective (Bottom 2 Box)	43%

Source: Ipsos Healthcare HCP Research, n=311 HCPs surveyed March 26 - April 2, 2020

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When looking at the Impact of CV19 on general vaccination behaviour, physicians on G-MED expect higher future uptake across vaccines

78% ▲

Of physicians responding to our poll anticipate higher rates of general vaccination post COVID-19

For many physicians on the forum, COVID-19 will have a positive impact on the general rate of vaccinations in years to come. This impact is expected to be most felt in the uptake of flu vaccinations. However, many of the physicians who replied to this poll believed the rates of vaccination would likely trail off, since the behaviour will most likely be post-CV19 panic, rather than a fundamental change of belief.

Some of the physicians on the community are apprehensive about the potential impact anti-vaxers may have on the positioning of the CV19 vaccine. Some of these physicians expect anti-vaxers to equate expedited vaccination development with lower efficacy and safety, which could influence the wider public. On top of this, some fear what could happen to vaccination rates if the CV19 vaccine is later proven to be unsafe.

SOURCE: G-MED, Global Physician Forum
 BASE: Physicians using the G-MED Physicians Only Community, asking 10 key Q&A questions
 7 - Ipsos | Medical Communities & COVID-19 | July 2020 | Wave 1 | Public

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The calm after the storm: Physicians' conversations online are turning to the longer-term management of CV19

Amongst physicians in the G-MED community, conversations have moved beyond the high-alert emergency topics of PPE, ventilation and hospitalisations and moved into calmer territory, such as:

- Establishing treatment protocols for CV19 and non-CV19 patients
- Lasting effects of CV19 and specific population concerns
- Hopes (and concerns) around vaccination development
- Physicians' increased comfort with virtual education

“most of the patients have been treated by primary care. If they have symptoms, we assume that they have Covid19 since they are not tested unless they get worse. Paracetamol, isolation and almost daily telephone follow-up, especially in the second week, which is when they usually get worse”
 Physician, Spain

“The best thing for me is to treat them according to the clinical guidance we have.”
 Physician, El Salvador

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There is a sense of cautious optimism amongst physicians on the community

Summary learnings in this wave from the G-MED Community:

- Physicians feel they have been 'through the worst' of the pandemic and have cautious optimism, specifically regarding a potential CV19 vaccine
- CV19 is expected to increase general vaccination uptake – at least for the short-term future
- Physicians are engaging with virtual learning opportunities, particularly those not treating CV19 with decreased caseloads

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FLU+FORCE

A MOBILE FLU CLINIC

FLU+FORCE—a new program brought to you by AstraZeneca in partnership with national immunization organizations. The program will provide you with vaccination options without the need for an in-office visit.

- ✦ THERE ARE BENEFITS FROM FLU VACCINATION. PREVENTING INFLUENZA IS ALWAYS IMPORTANT, BUT IN THE CONTEXT OF THE COVID-19 PANDEMIC, IT'S EVEN MORE CRITICAL TO DO EVERYTHING POSSIBLE TO HELP REDUCE ILLNESS AND PRESERVE HEALTH CARE RESOURCES!
- ✦ FLU+FORCE IS DESIGNED TO PROVIDE RESOURCES THAT WILL HELP YOU EXECUTE A MOBILE FLU CLINIC USING AN INFORMATION GATEWAY TO ACCESS:
 - COMMUNICATION TEMPLATES
 - PROCESS AND LOGISTICS GUIDANCE
 - PARTNERSHIP LINKS TO IMPORTANT TOOLS
- ✦ WHETHER IN A POP-UP FACILITY OR A DRIVE-THROUGH CLINIC, FLU+FORCE IS PROUD

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