

COVID-19 HCP Sentiment Surveys

Part 1: Physician Engagement with Patients and Remote/Telehealth Experiences

April 2020



Research overview

- Question ideas and topics were solicited from Sermo clients during the period from March 23rd to March 30th
- This report address topics related to experiences physicians are having with patients and remote/telemedicine
- Questionnaire was developed and programmed by Sermo
- Data collected between April 3 and April 14, 2020
- Sermo invited physicians among a list of eight specialties, and in nine countries (details shown in table to the right)
- Respondents were not incentivized for their time
- Total sample: 1,392

Country	Sample
United States	221
Italy	323
Spain	181
France	167
Germany	137
Great Britain	135
China	111
Japan	110
Switzerland	7
Specialty	Sample
General Practice or Internal Medicine	611
Cardiology	169
Oncology	153
Neurology	143
Psychiatry	104
Rheumatology	82
Dermatology	66

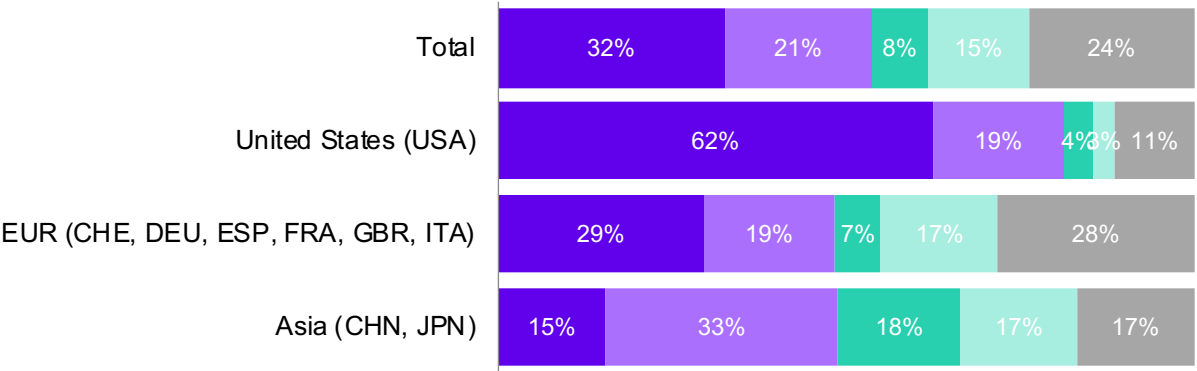
Key findings

- Physicians in Europe and Asia note slight declines in patient volume – unlike the US, which has seen wide declines in patient volume since before the COVID-19 outbreak
- Cardiologists and Dermatologists have had the greatest declines in patient volume
- HCPs are dealing with a substantial share of calls & time related to COVID-19, but non-COVID-19 calls are still the majority
- Remote and telehealth treatment has jumped, with over 90% of physicians treating patients remotely
- Telemedicine tools are commonly used for remote treatment, particularly in the US where 63% of HCPs have used it during the COVID-19 outbreak
- Among physicians using telemedicine for consultation during the COVID-19 outbreak, nearly half (48%) are using it for the first time
- When the outbreak ends, one-fifth of physicians using video conferencing and telemedicine tools expect to use them significantly more than before

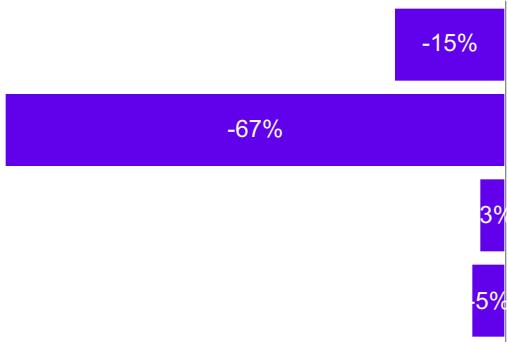
HCPs in the US have seen wide declines in patient volume since before the COVID-19 outbreak, with 81% noting mild/significant decline and 14% an increase

Overall Impact on Patient Volume (vs. Pre-Crisis)?

■ Significant drop ■ Mild drop ■ No change ■ Mild increase ■ Significant increase



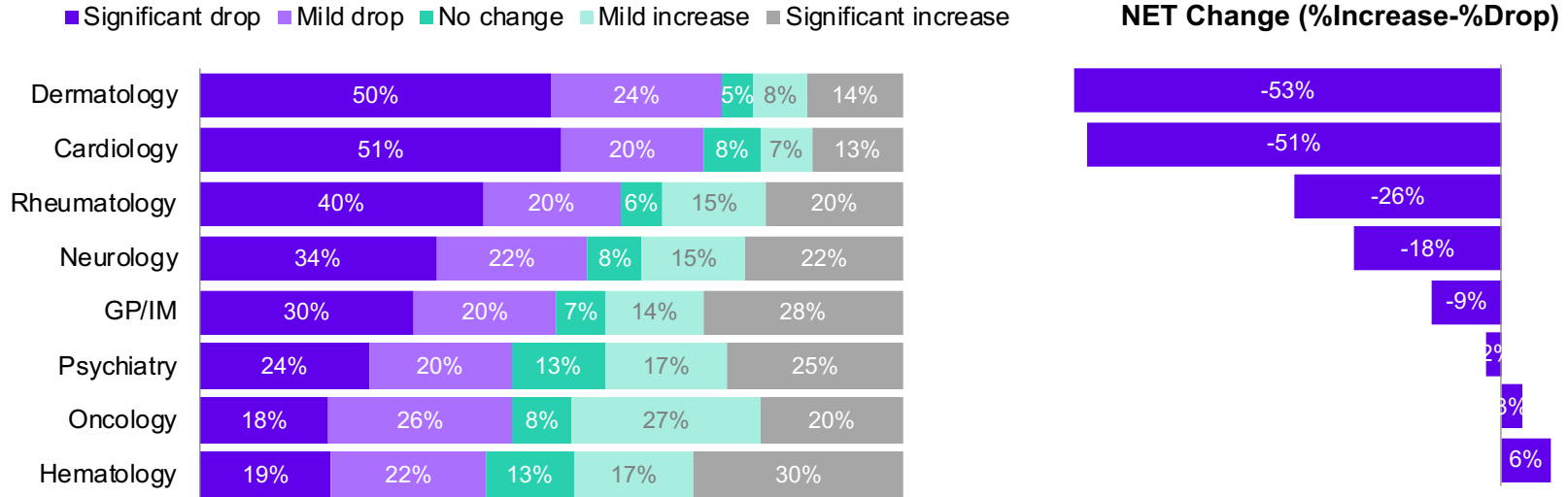
NET Change (%Increase-%Drop)



	Total	USA	EUR	Asia
Base Sizes, n=	1,392	221	950	221

Dermatologists and Cardiologists have had the greatest declines in patient volume since before the COVID-19 outbreak

Overall Impact on Patient Volume (vs. Pre-Crisis)?

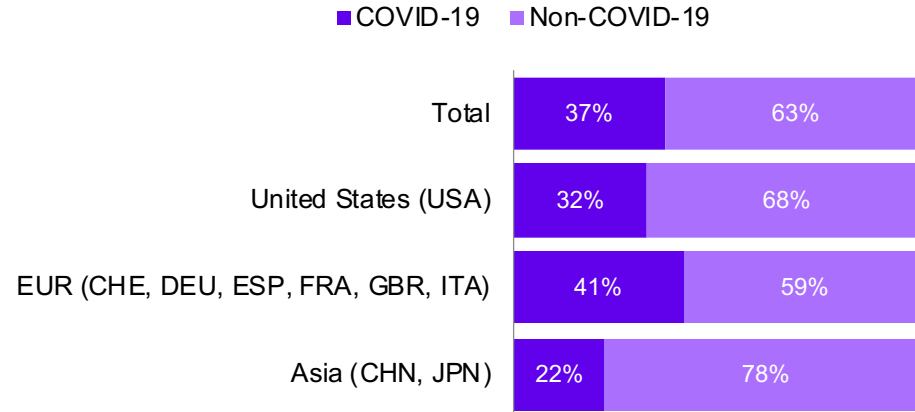


Q4. Overall, what impact have these changes had on your volume of patient interactions (either in-person or remote care) vs. pre-crisis?

	Card.	Derm.	Hema.	GP/IM	Neuro.	Onc.	Psych.	Rheum.
Base Sizes, n=	169	66	64	611	143	153	104	82

HCPs are dealing with a substantial share of calls & time related to COVID-19, but non-COVID-19 calls are still the majority

Average Share of Patient Calls/Time Now Related To...



- COVID-19 takes up about one-third of the calls & time for US HCPs
- COVID-19 takes up just over 40 percent of calls & time for HCPs in Europe

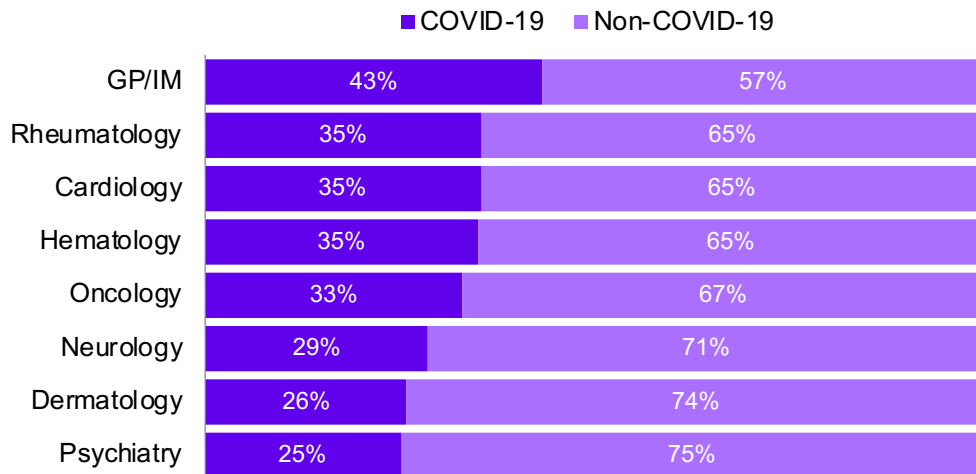
Q2. What percentage of calls/percentage of time are/is now related to concerns about COVID-19 symptoms vs. non-COVID related?

	Total	USA	EUR	Asia
Base Sizes, n=	1,392	221	950	221

General Practice/Internal Medicine HCPs note a higher share of calls & time devoted to COVID-19

Average Share of Patient Calls/Time Now Related To...

Q8. How has the COVID-19 situation affected your office staffing?



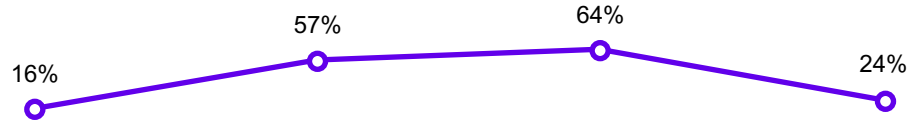
- Rheumatologists, Cardiologists and Hematologists also note higher share of calls & time
- Psychiatrists, Dermatologists and Neurologists have the lowest share of calls & time

Q2. What percentage of calls/percentage of time are/is now related to concerns about COVID-19 symptoms vs. non-COVID related?

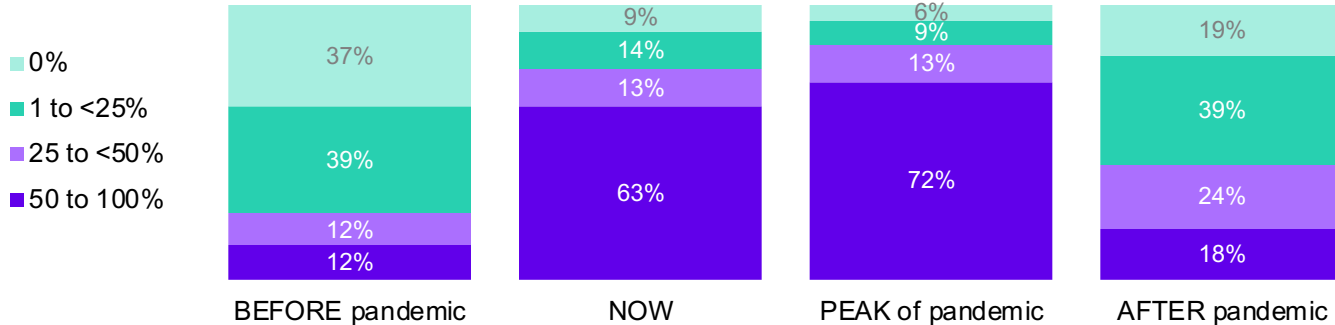
	Card.	Derm.	Hema.	GP/IM	Neuro.	Onc.	Psych.	Rheum.
Base Sizes, n=	169	66	64	611	143	153	104	82

Remote & telehealth treatment has jumped with over 90% treating patients remotely

Average Share of Patient Visits by Remote/Telehealth



Share of patients treated via remote/telehealth (at relevant points of COVID-19 outbreak) - TOTAL

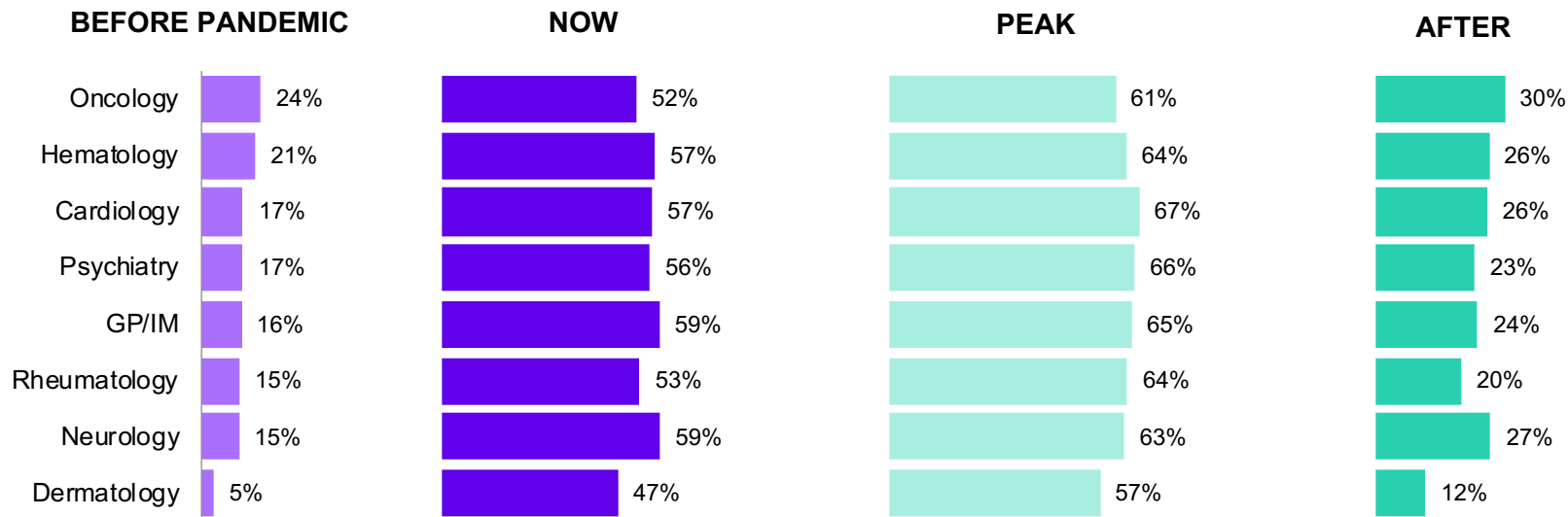


- On average, 57% of patients are currently being treated remotely
- HCPs expect to be treating a nearly a quarter of their patients through remote/telehealth methods – up from 16% before

	Total
Base Sizes, n=	1,392

All specialties are treating at least half of their patients remotely; when the COVID-19 outbreak ends all specialties expect to be seeing more patients remotely

Average Share of Patient Visits by Remote/Telehealth

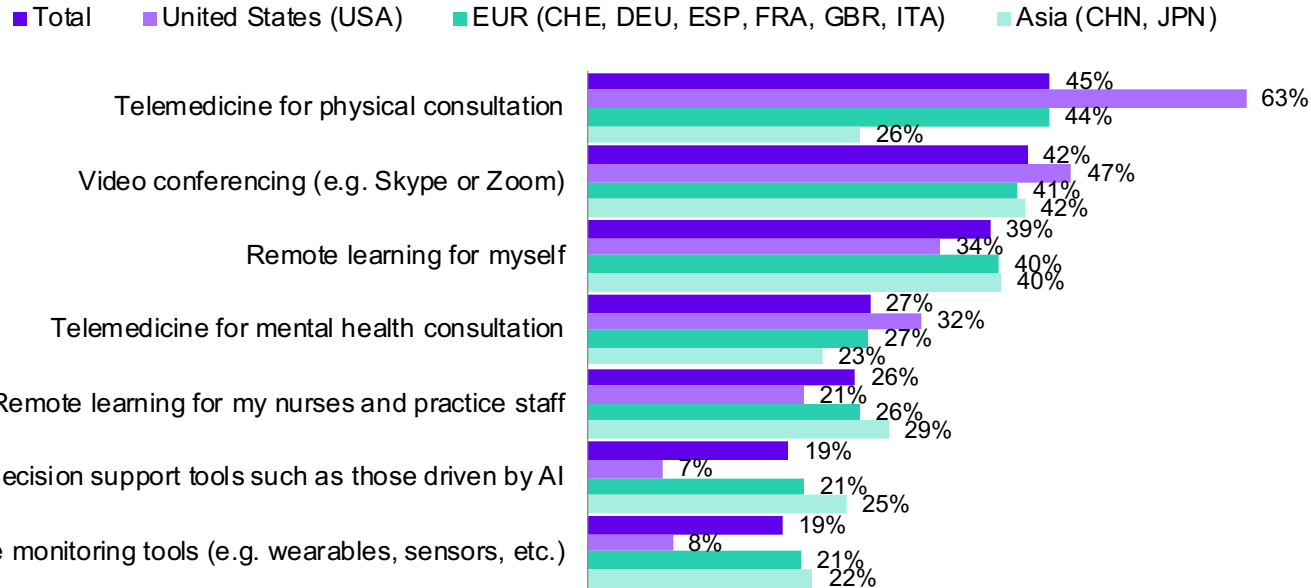


Calculation of percent of weekly patient visits that are remote/telehealth at each timepoint

	Card.	Derm.	Hema.	GP/IM	Neuro.	Onc.	Psych.	Rheum.
Base Sizes, n=	169	66	64	611	143	153	104	82

Telemedicine tools are commonly used for remote treatment, particularly in the US where 63% of HCPs have used it during the COVID-19 outbreak

Remote Activities and Tools Currently Used



- While HCPs in the US are using remote treatment solutions more widely, those in Europe and Asia are using the time to conduct remote learning
- Clinical decision support and remote monitoring tools are being used by more HCPs in Europe and Asia than the US

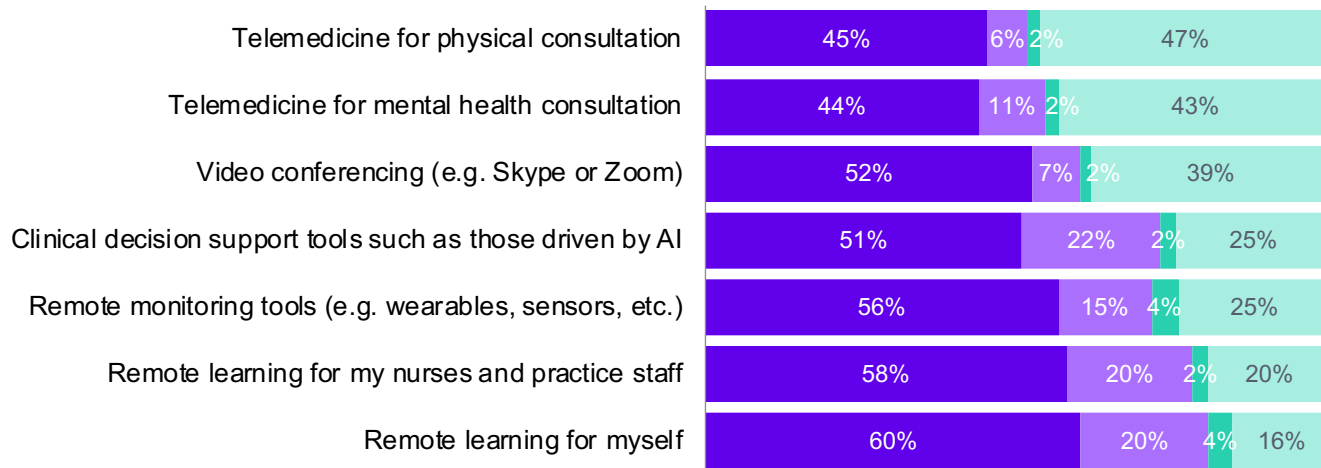
Q9. Which of the following activities/remote working tools have you used since the emergence of COVID-19?

	Total	USA	EUR	Asia
Base Sizes, n=	1,392	221	950	221

Among physicians using telemedicine for consultation during the COVID-19 outbreak, nearly half (47%) are using it for the first time

Remote Activities and Tools Used/telehealth - since COVID-19 started

■ Using more ■ Using about the same ■ Using less ■ Just started



Other telemedicine and remote consultation tools are being used for the first time among many physicians

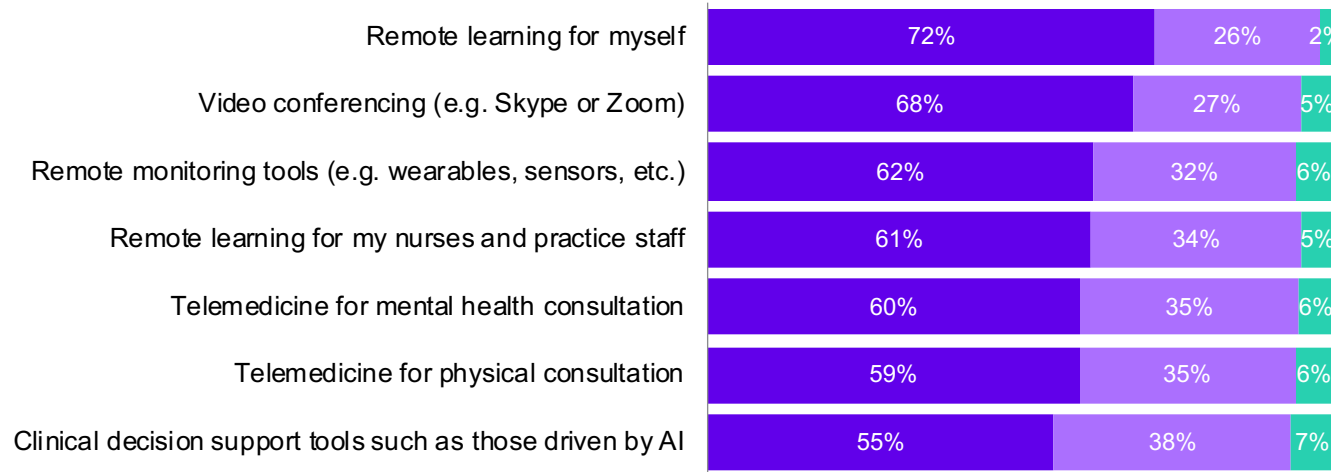
Q10. Which best describes how frequently you have used these activities/remote working tools? Answers based "since when COVID-19 started"

	Video conf.	Telemed. for physical	Telemed. for mental health	Remote monitoring	Decision support tools	Remote learning: self	Remote learning: staff
Base size (n=)	589	620	378	261	269	539	359

Overall, HCPs have positive experiences with remote learning and video conferencing tools

Impression of Remote Activities and Tools Used/telehealth

■ Positive ■ Neutral ■ Negative



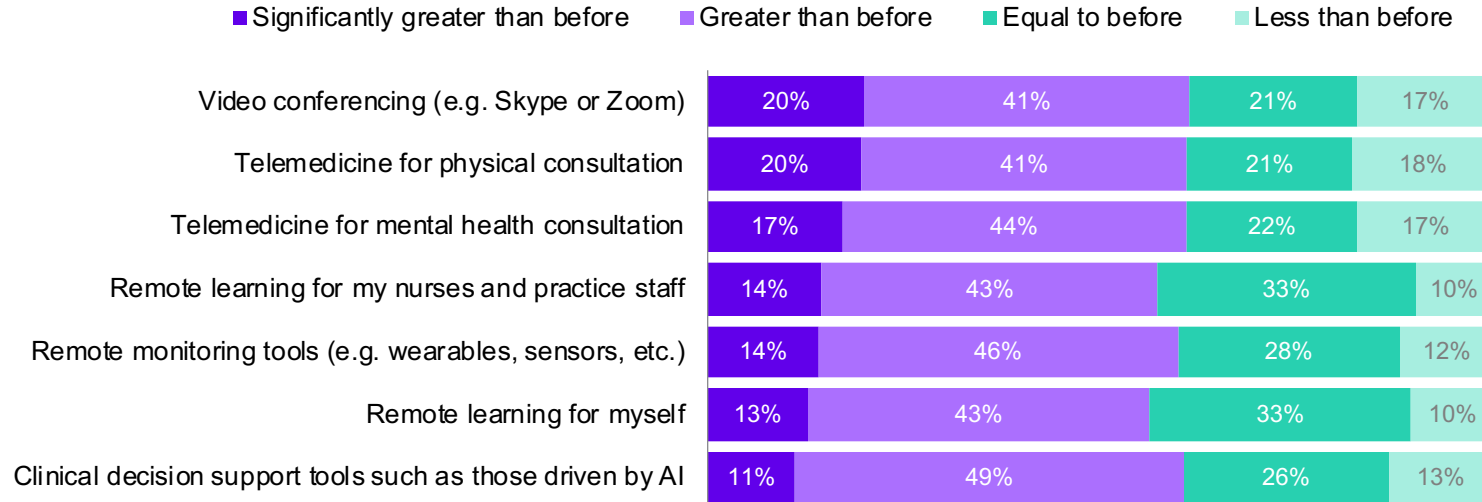
It's noteworthy that video conferencing tools have higher positive rating (68%) over telemedicine (60%) and clinical decision support tools (55%)

Q11. What has been your experience with each of these activities/remote working tools?

	Video conf.	Telemed. for physical	Telemed. for mental health	Remote monitoring	Decision support tools	Remote learning: self	Remote learning: staff
Base size (n=)	589	620	378	261	269	539	359

When the outbreak ends, one-fifth of physicians using video conferencing and telemedicine tools expect to use them significantly more than before

Expected Usage of Remote Tools - Compared to Before COVID-19

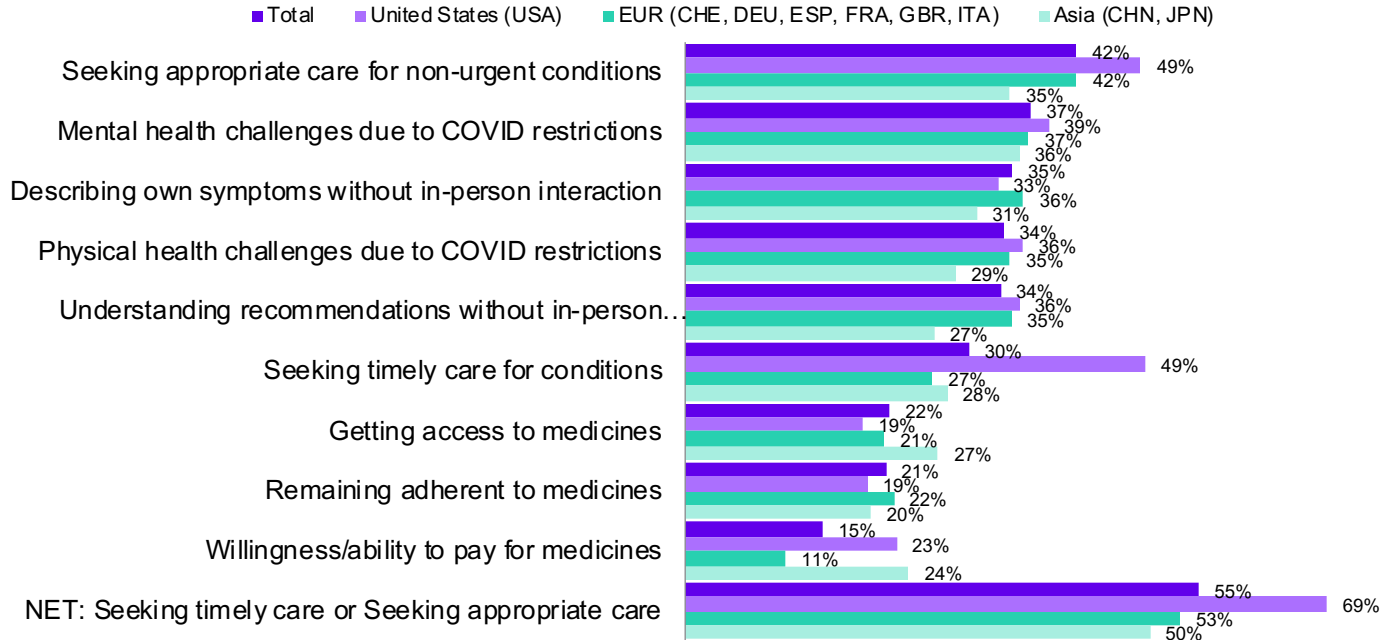


Q12. Once the crisis is over, how frequently do you envision using these remote working tools?

	Video conf.	Telemed. for physical	Telemed. for mental health	Remote monitoring	Decision support tools	Remote learning: self	Remote learning: staff
Base size (n=)	589	620	378	261	269	539	359

For patients with non-COVID-19 conditions, physicians recognize that seeking appropriate during this period is a big challenge, especially in the US

Biggest Challenges Facing Patients to Manage New/Existing non-COVID-19 Conditions



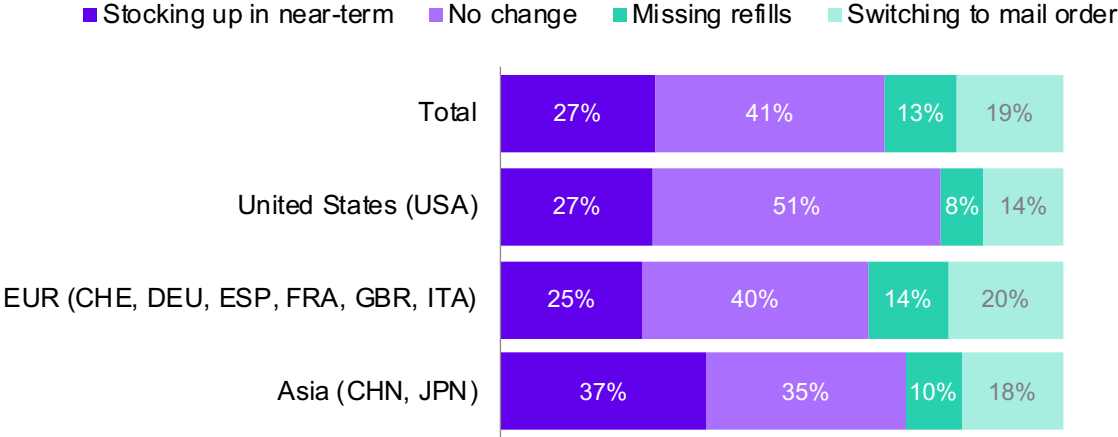
The other sharp difference between US and non-US physicians is that nearly a quarter of those in the US (23%) note challenges with willingness to pay for medicines

Q23. Beyond suspected and confirmed COVID-19 cases and complications associated with COVID-19, what are the biggest challenges facing patients related to management of their existing healthcare conditions? (Select all that apply)

	Total	USA	EUR	Asia
Base Sizes, n=	1,392	221	950	221

Just over one-quarter of physicians note that patients are primarily stocking up on prescription refills during this period

How Patients are Managing Prescription Refills

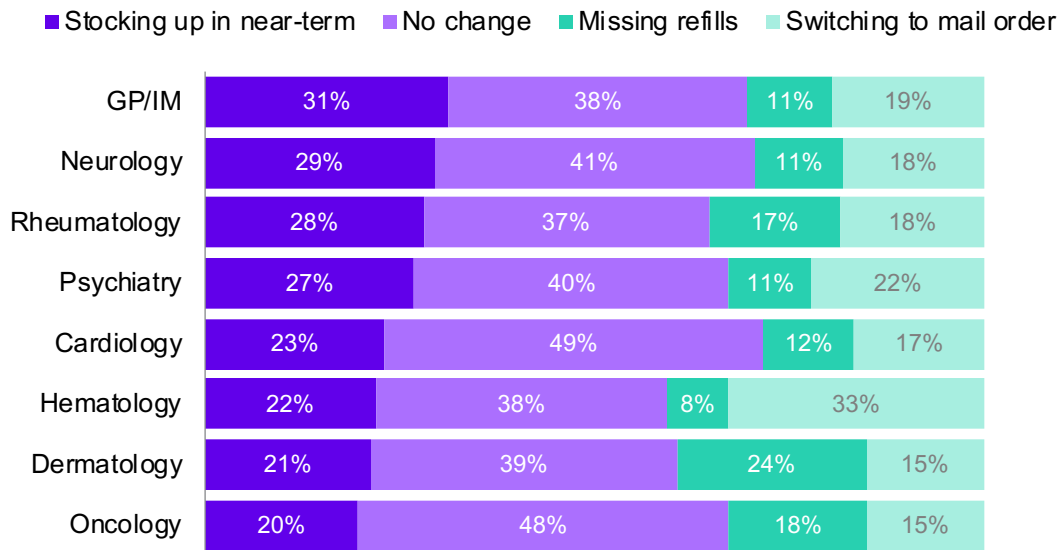


- In the US, physicians primarily note patients are stocking up (27%) rather than switching to mail order (14%)
- The difference is not as great in Europe, where 25% of physicians primarily note patients are stocking up, compared to 20% switching to mail order

	Total	USA	EUR	Asia
Base Sizes, n=	1,392	221	950	221

Specialists differ in how they primarily see patients managing their prescription refills

How Patients are Managing Prescription Refills



- 33% of Hematologists identify patients as *switching to mail order*
- 24% of Dermatologists identify patients as *missing refills*
- Nearly half of Cardiologists and Oncologists report patients as having *no change*
- 31% of GPs/IMs identify patients as *stocking up in the near-term*

Q26. In your specialty, how have your patients been managing their upcoming refills?

	Card.	Derm.	Hema.	GP/IM	Neuro.	Onc.	Psych.	Rheum.
Base Sizes, n=	169	66	64	611	143	153	104	82

Thank you

To learn how Sermo can support your HCP insights and engagement goals, email us at business@sermo.com

