COVID-19 HCP Sentiment Surveys

Part 2: Physician Interactions with Medical Technology and Pharmaceutical Manufacturers

April 2020

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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 current and expected interactions with medical technology and pharmaceutical companies
- 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: 1,155

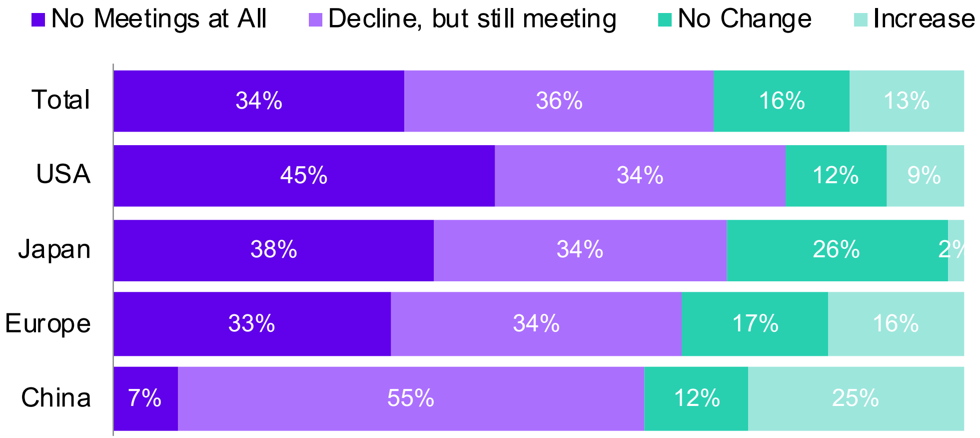
Country	Sample
United States	366
Spain	167
Italy	166
Japan	116
China	110
Great Britain	104
France	77
Germany	38
Switzerland	11
Specialty	**Sample**
General Practice or Internal Medicine	541
Oncology	112
Cardiology	110
Psychiatrist	107
Neurology	93
Dermatology	86
Rheumatology	66

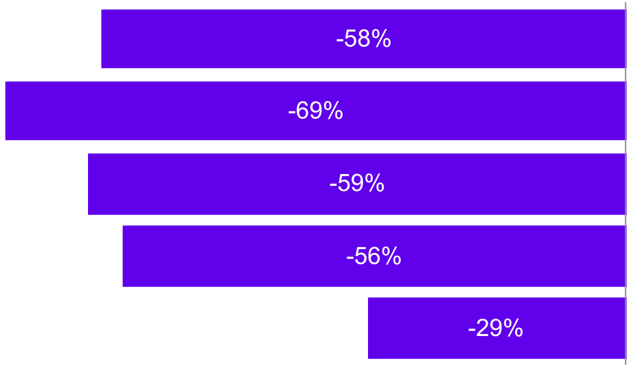
Key findings

- US has seen the largest drop in share of representative meetings (-69%), and Europe (-59%) and Japan (-56%) have also seen substantial declines
- Compared to before the crisis, HCPs expect to have fewer representative meetings after the crisis, though the decline is not expected to be as great in China and among Dermatologists and Cardiologists
- Future expectations of representative meetings is a shift to virtual and distance meetings, particularly in the US and Europe
- All specialists foresee declines in in-person meetings, though level of change varies greatly by specialty
- HCPs agree on the importance of manufacturers providing information on drug supply status, and the most effective methods for reaching them is through email in the US and Europe, websites in Japan, and social media in China
- HCPs in Japan greatly anticipate the crisis will affect their willingness to welcome representative into their clinics or institutions, and Neurologists & Hematologists expect to be least willing to welcome representatives
- Nearly two-thirds of HCPs conducting clinical trials in Japan have been negatively impacted by the crisis and, among specialists, Oncologists (64%) have been most negatively impacted
- Among types of interactions with MedTech and Pharma, HCPs most expect to accelerate transition to digital training and virtual classes

US has seen the largest drop in share of representative meetings (-69%), and Europe (-59%) and Japan (-56%) have also seen substantial declines

Overall Impact on Med Tech and Pharma Rep Meetings (vs. Pre-Crisis)

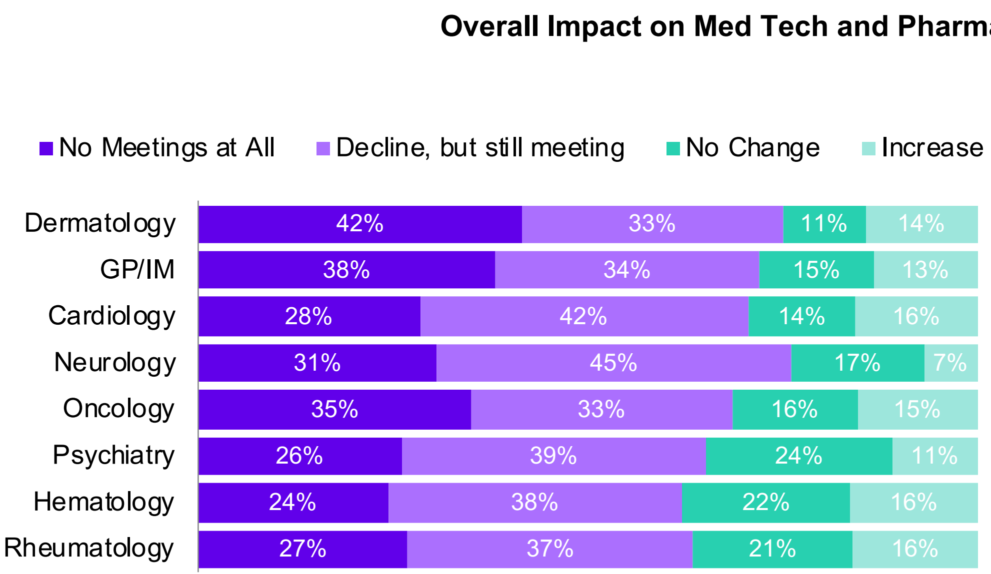


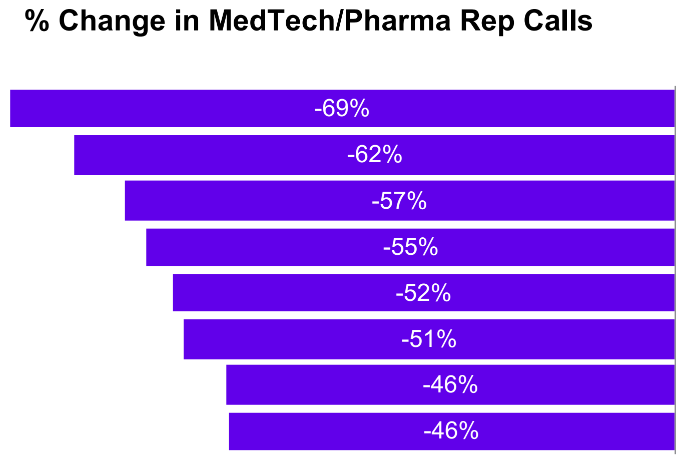


Q1/Q3. Before the COVID-19 pandemic began/Now, in the current environment, how many conversations were you having with medical technology and pharmaceutical representatives in a typical week?

	Total	USA	EUR	JPN	CHN
Base Sizes, n=	1,155	366	563	116	110

All specialties have experienced declines in representative meeting, with the greatest among Dermatologists (-69%)





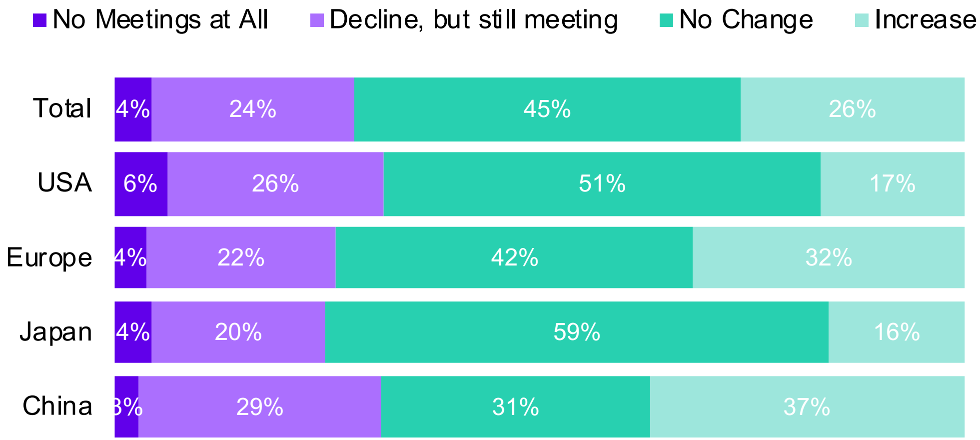
Q1/Q3. Before the COVID-19 pandemic began/Now, in the current environment, how many conversations were you having with medical technology and pharmaceutical representatives in a typical week?

	Card	Derm	Hema	GP/IM	Neuro	Onc	Psych	Rheum
Base Sizes, n=	110	86	40	541	93	112	107	66

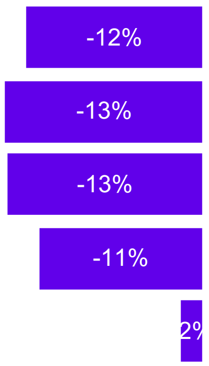
Compared to before the crisis, HCPs expect to have fewer representative meetings after the crisis, though it’s not globally expected

The largest share of HCPs (45% overall, and 51% in USA) still think future meetings will return to pre-crisis levels

Expected Future Impact on Med Tech and Pharma Rep Meetings (vs. Pre-Crisis)?



% Change in MedTech/Pharma Rep Calls



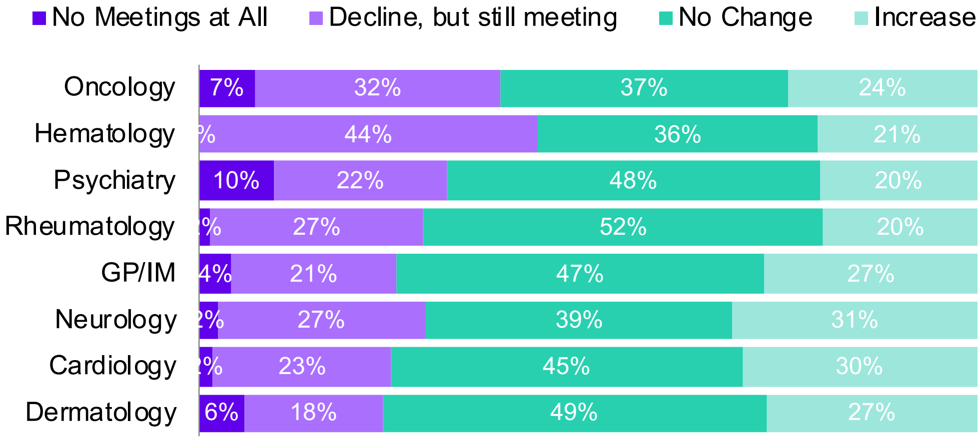
Q1/Q7. Before the COVID-19 pandemic began/After the COVID-19 pandemic subsides and normalcy returns, in the current environment, how many conversations were you having with medical technology and pharmaceutical representatives in a typical week?

	Total	USA	EUR	JPN	CHN
Base Sizes, n=	1,155	366	563	116	110

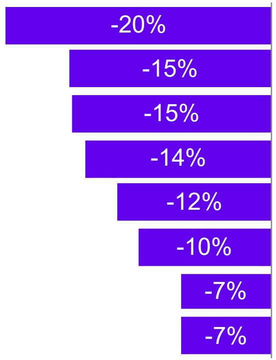
Oncologists (-20%) and Hematologists (-15%) expect the greatest decline in representative meetings after the crisis

Dermatologists and Cardiologists have higher expectation of meetings returning to pre-crisis levels – or (even) increasing

Overall Impact on Med Tech and Pharma Rep Meetings (vs. Pre-Crisis)?



% Change in MedTech/Pharma Rep Calls



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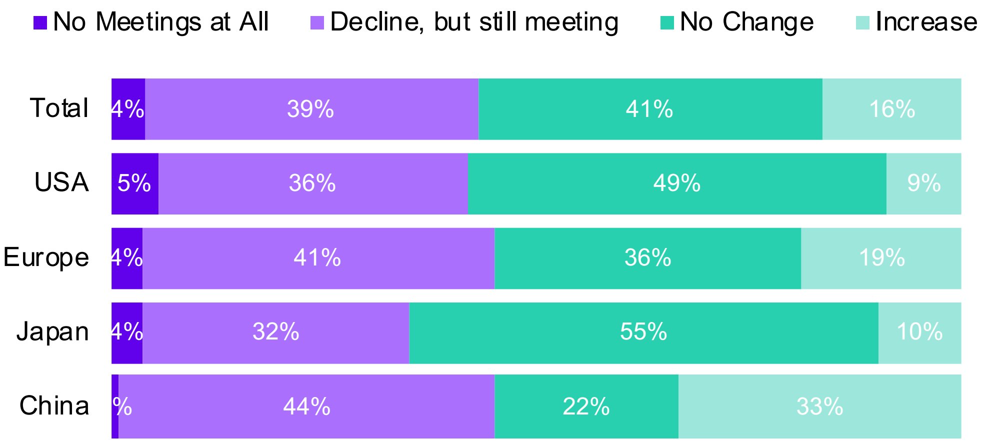
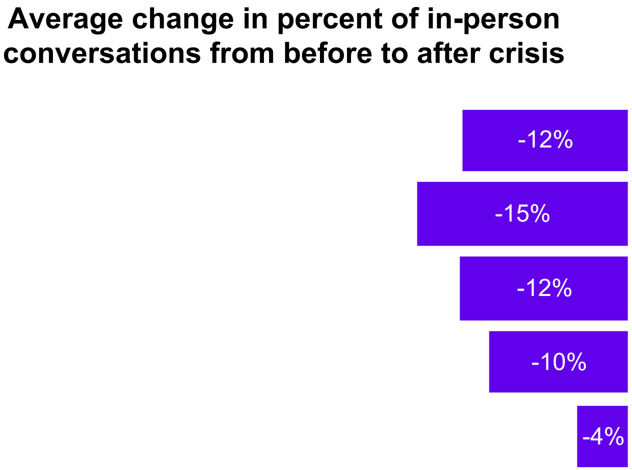
	Card	Derm	Hema	GP/IM	Neuro	Onc	Psych	Rheum
Base Sizes, n=	110	86	40	541	93	112	107	66

Future expectations of representative meetings is a shift to virtual and distance meetings, particularly in the US (-15%) and Europe (-12%)

HCPs generally anticipate lower share of *in-person* meetings after the crisis

Overall Impact on Med Tech and Pharma Rep In-Person Meetings (Post vs. Pre-Crisis)?





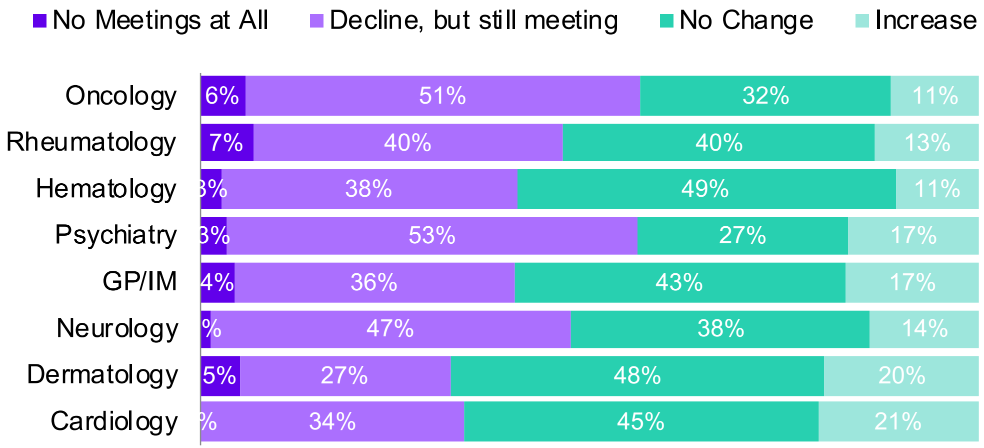
Q2/Q4. Before the COVID-19 pandemic began/After crisis, what share of your conversations are in-person?

	Total	USA	EUR	JPN	CHN
Base Sizes, n=	1,010	291	509	109	101

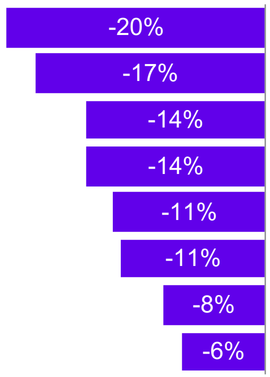
All specialists foresee declines in *in-person* meetings, though level of change varies greatly by specialty

- Dermatologists (-6%) and Cardiologists (-8%) expect to maintain nearly the same levels of in-person meetings
- Oncologists (-20%) and Rheumatologists (-17%) expect a greater shift of virtual/distant meetings

Overall Impact on Med Tech and Pharma Rep In-Person Meetings (Post vs. Pre-Crisis



Average change in percent of in-person conversations from before to future

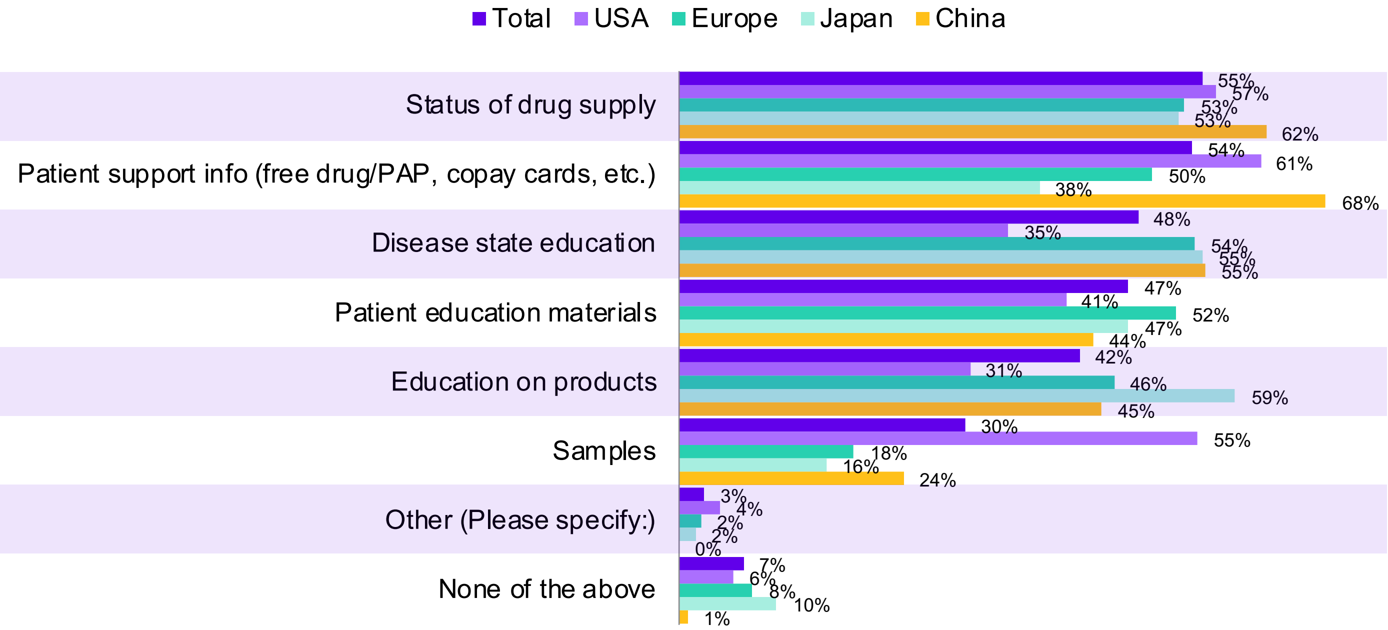


Q2/Q4. Before the COVID-19 pandemic began/after crisis, what share of your conversations are in-person?

	Card	Derm	Hema	GP/IM	Neuro	Onc	Psych	Rheum
Base Sizes, n=	106	81	34	452	83	106	86	62

HCPs agree on the importance of manufacturers providing information on drug supply status

Most Useful Support or Information from Manufacturers



HCPs differ on other information manufacturers should share:

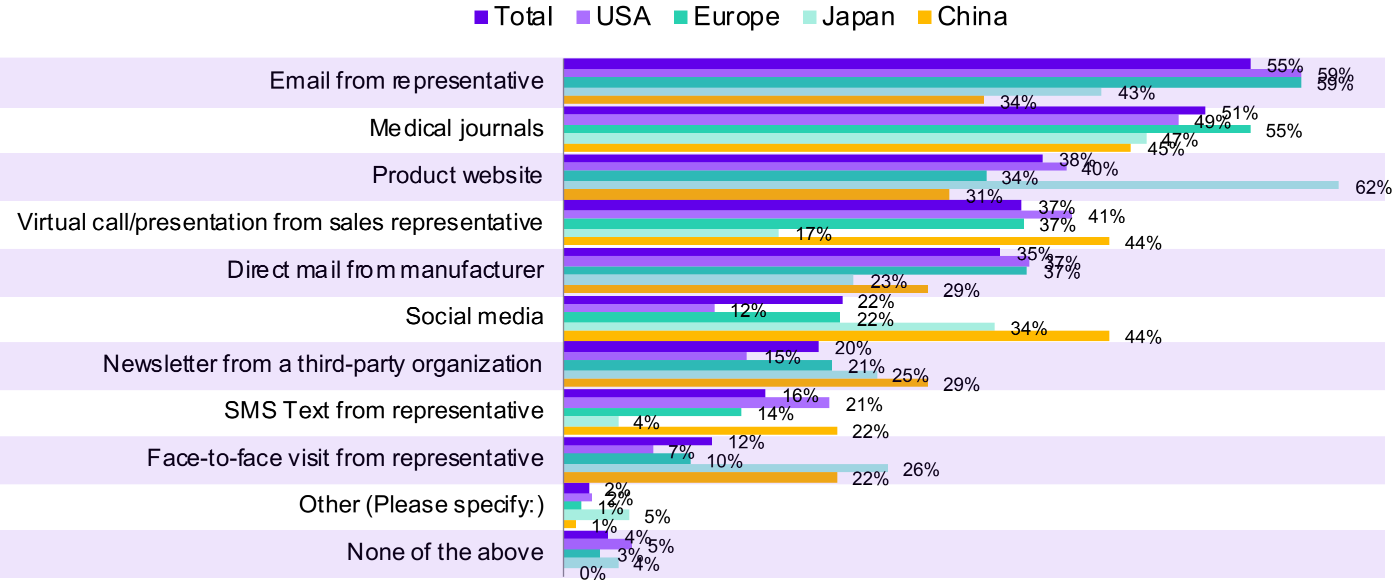
- Japan expresses greater interest in product education (59%)
- US expresses greater interest in samples from manufacturers (55%)
- Europe expresses more interest in education materials, particularly on disease state (54%) and patient education (52%)

Q9. During this COVID-19 outbreak, what type of manufacturer support or product information is useful right now? (Select top 3)

	Total	USA	EUR	JPN	CHN
Base Sizes, n=	1,155	366	563	116	110

In the US and Europe, email is the most effective method for reaching HCPs on support, news or product information

Most Effective Formats to Receive Manufacturer Support, News, or Product Information



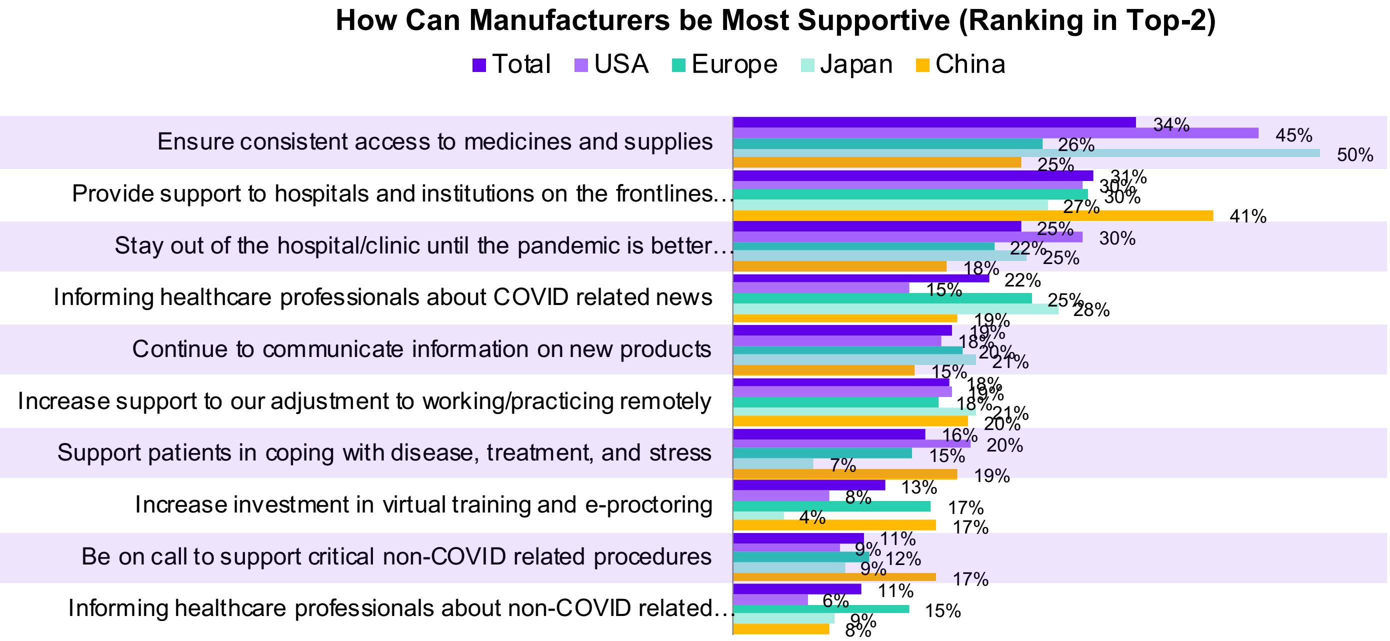
HCPs in Japan and China will look to more online or social media methods

- 62% of HCPs in Japan consider product websites to be most effective
- 44% of HCPs in China consider social media to be most effective

Q10. During this outbreak, what are the most effective formats to receive manufacturer support, news, or product information? (Select top 3)

	Total	USA	EUR	JPN	CHN
Base Sizes, n=	1,155	366	563	116	110

HCPs by geography express different priorities for how manufacturers can be supportive

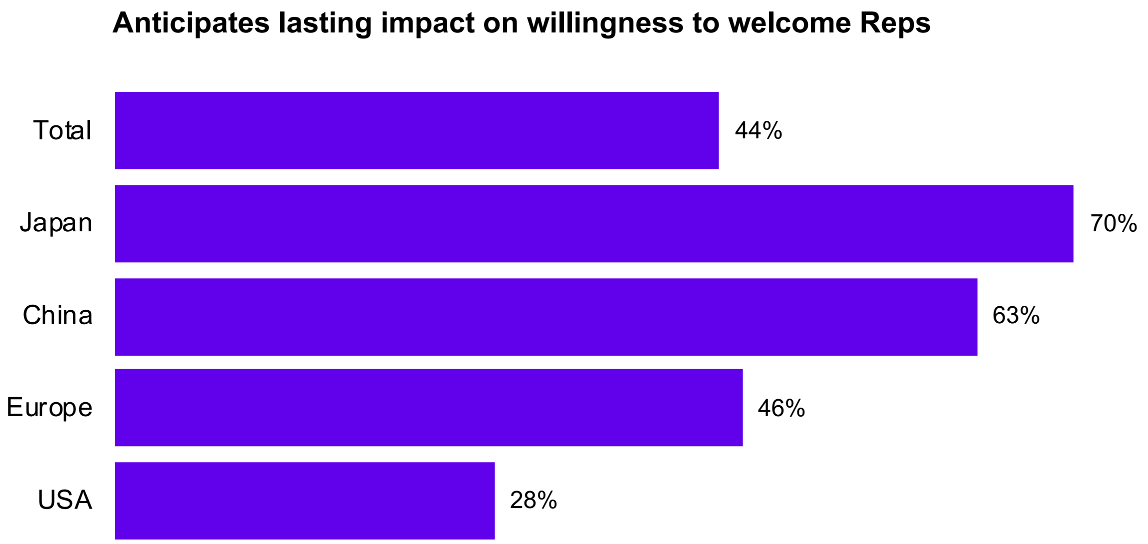


- US (45%) and Japan (50%) place highest importance on access to medicines and supplies
- Chinese HCPs express higher importance for manufacturers to provide support to healthcare institutions on the frontlines (41%)

Q15. (% Top-2 Ranking) Rank each of these in terms of what you find to be most supportive to least supportive.

	Total	USA	EUR	JPN	CHN
Base Sizes, n=	1,155	366	563	116	110

HCPs in Japan (70%) greatly anticipate the crisis will affect their willingness to welcome representative into their clinics or institutions



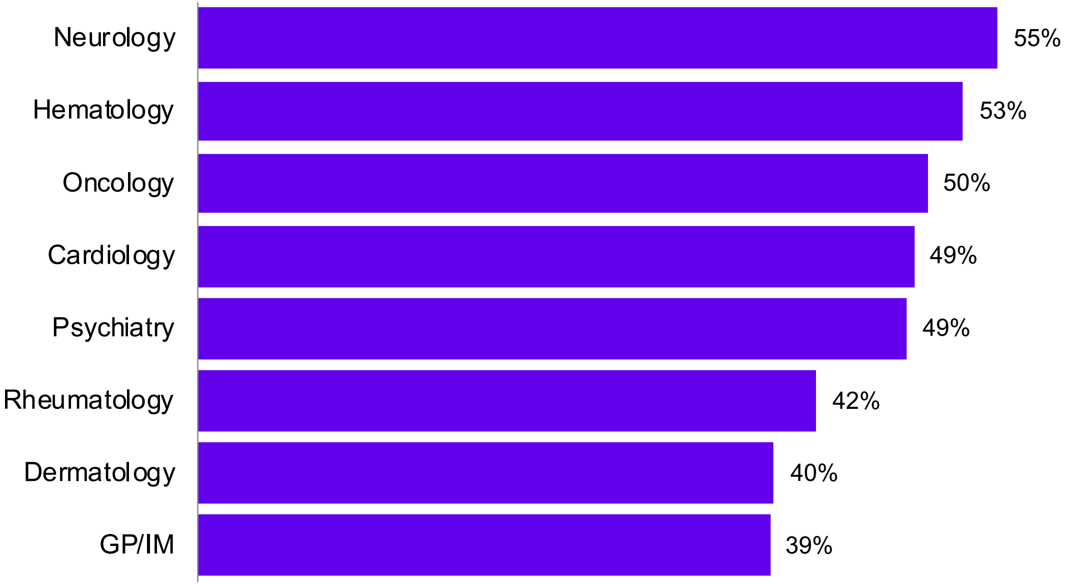
Expectations differ greatly by geography, though – US HCPs expect the impact to be least among the geographies studied

Q17. Do you anticipate the current situation having a lasting impact on your willingness to welcome pharma reps (sales or medical) into your clinic/institution for live meetings in the future?

	Total	USA	EUR	JPN	CHN
Base Sizes, n=	1,155	366	563	116	110

Neurologists (55%) and Hematologists (53%) expect to be least willing to welcome representatives

Anticipates lasting impact on willingness to welcome Reps



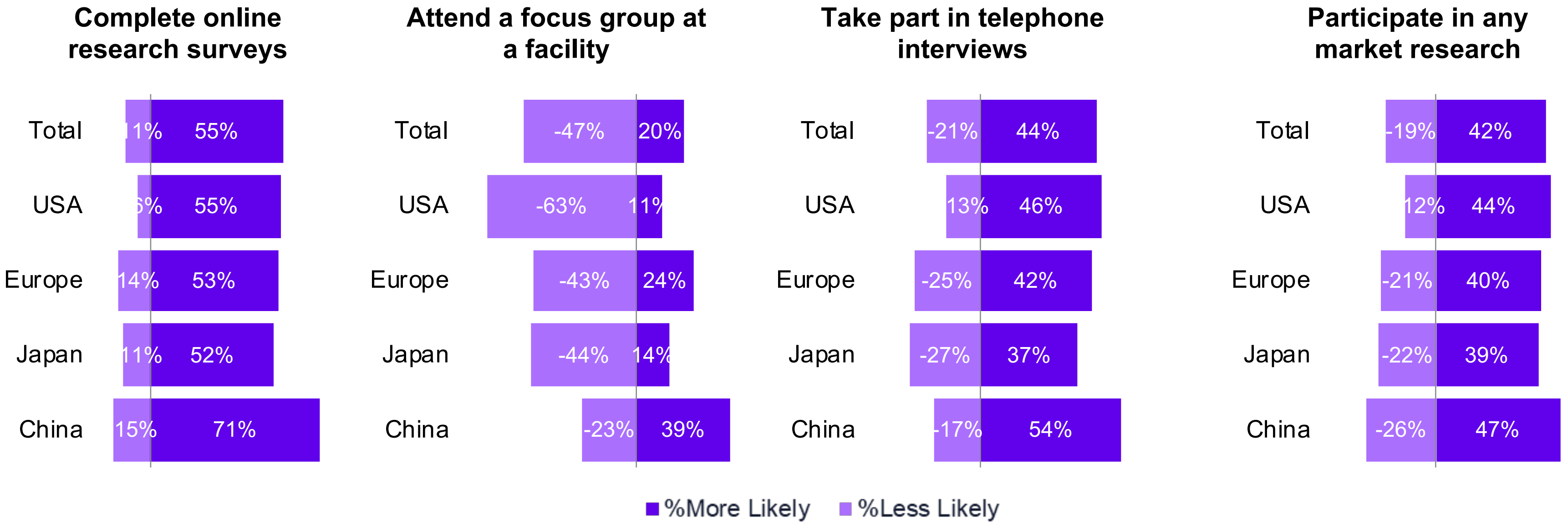
Expectations also differ by specialty, as Dermatologists and GPs display a lower reluctance to welcome representatives

Q17. Do you anticipate the current situation having a lasting impact on your willingness to welcome pharma reps (sales or medical) into your clinic/institution for live meetings in the future?

	Card	Derm	Hema	GP/IM	Neuro	Onc	Psych	Rheum
Base Sizes, n=	110	86	40	541	93	112	107	66

Physicians expect to increase their research participation, though HCPs expect to reduce their participation in focus groups, particularly in the US

Change in Likelihood to Participate in Research Activities
(%Much Less/Somewhat Less Likely & %Highly/Somewhat Likely)

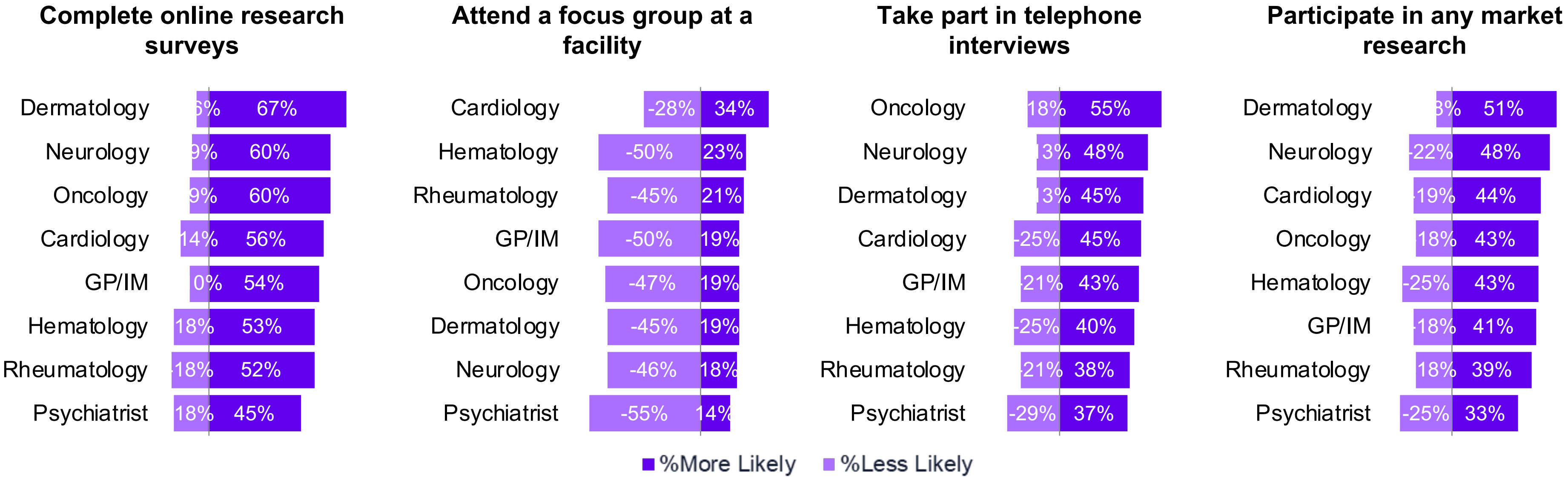


Q19. Compared to two months ago, how likely are you currently to do each of the following…

	Total	USA	EUR	JPN	CHN
Base Sizes, n=	1,155	366	563	116	110

All specialties expect an increase in research activities, except for in-person focus groups, which will have a net decrease among nearly all specialties

Change in Likelihood to Participate in Research Activities
(%Much Less/Somewhat Less Likely & %Highly/Somewhat Likely)



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	Card.	Derm.	Hema.	GP/IM	Neuro.	Onc.	Psych.	Rheum.
Base Sizes, n=	110	86	40	541	93	112	107	66

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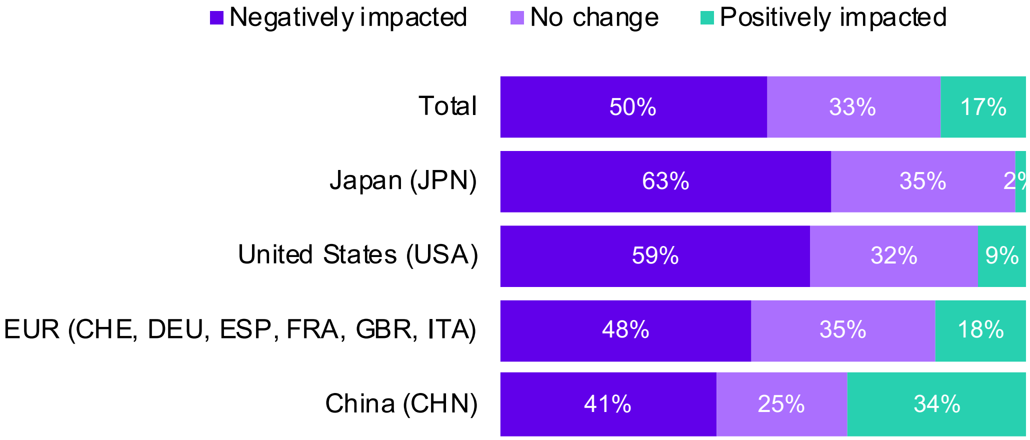
Nearly two-thirds (63%) of HCPs conducting clinical trials in Japan have been negatively impacted by the crisis

Overall Impact on Clinical Trials

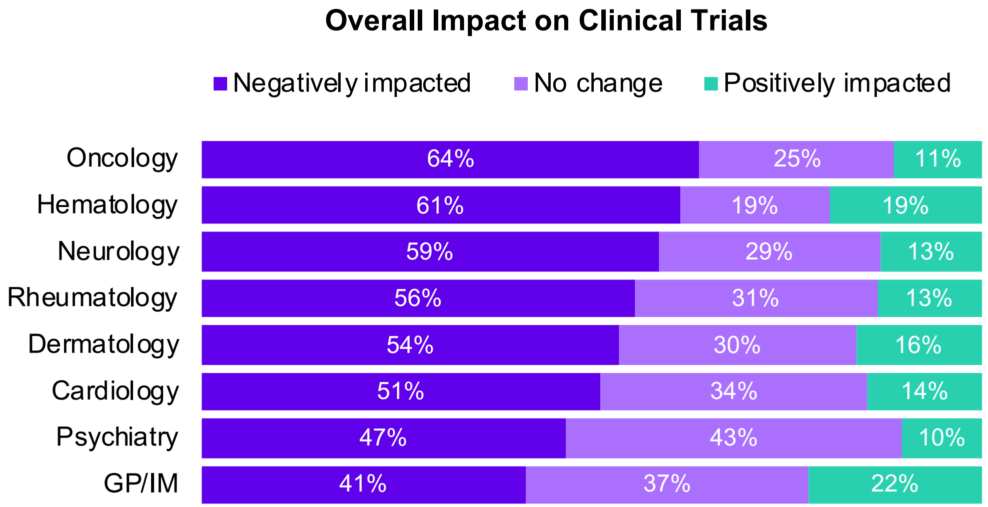


- 59% of HCPs conducting trials in the US also have been negatively impacted
- On the other hand, HCPs conducting trials in China report mixed impact of the crisis (41% report negative impact while 34% report positive impact)

Q20. How has the COVID-19 outbreak impacted on your ability to run clinical trials? (Among those who run trials)

	Total	USA	EUR	JPN	CHN
Base Sizes, n=	797	135	480	86	96

Among the specialties conducting clinical trials, Oncologists (64%) have been most negatively impacted by the crisis



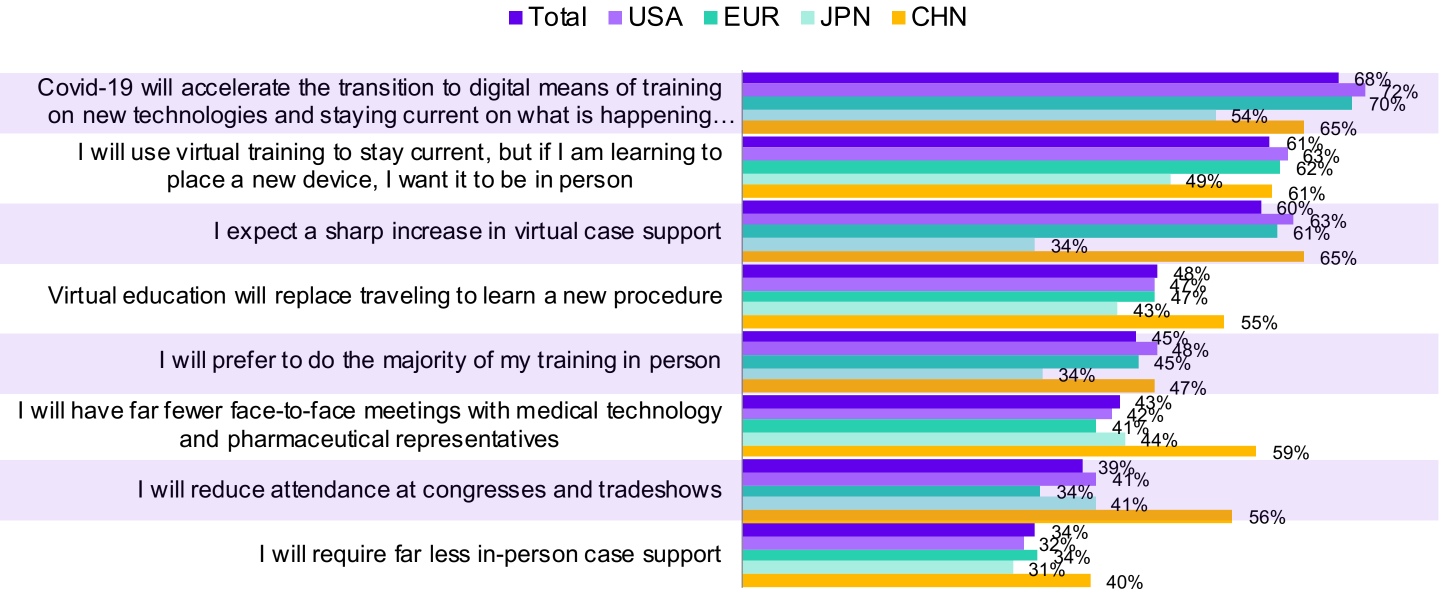
- Hematologists (61%) have also been more negatively impacted
- While GPs who conduct trials have been least negatively impacted (41%)

Q20. How has the COVID-19 outbreak impacted on your ability to run clinical trials? (Among those who run trials)

	Card	Derm	Hema	GP/IM	Neuro	Onc	Psych	Rheum
Base Sizes, n=	94	59	34	310	75	106	70	49

Among types of interactions with MedTech and Pharma, HCPs most expect to accelerate transition to digital training and virtual classes

Future Expected Interactions with MedTech and Pharma Companies (% Top-2 Rating)



- While just over one-third of HCPs expect to require less in-person case support, this is the lowest among the expected changes
- Additionally, four-in-ten HCPs expect to reduce attendance at congresses and tradeshows
- Among specialties, Oncology is the only specialty that notes lower activities listed

Q23. (%Top-2) How much do you agree with the following statements regarding the future interactions with medical technology and pharmaceutical vendors after the pandemic has subsided?

	Total	USA	EUR	JPN	CHN
Base Sizes, n=	1,155	366	563	116	110

Thank you

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