

COVID-19 HCP Sentiment Surveys

Part 3: Timing for physician bounce back to pre-pandemic patient activity levels & how this impacts HCP access

May 2020



Sermo's HCP Sentiment Study Series: Part 3 research overview

- Survey covers timing for physician bounce back to pre-pandemic patient activity levels & how this impacts HCP access
- Questions were solicited from Sermo clients between April 22nd – May 1st
- Questionnaire was developed and programmed by Sermo
- Data collected between May 8th – May 18th
- Sermo invited physicians among a list of six specialties across eight countries
- Respondents were not incentivized for their time
- Total sample: 1,209

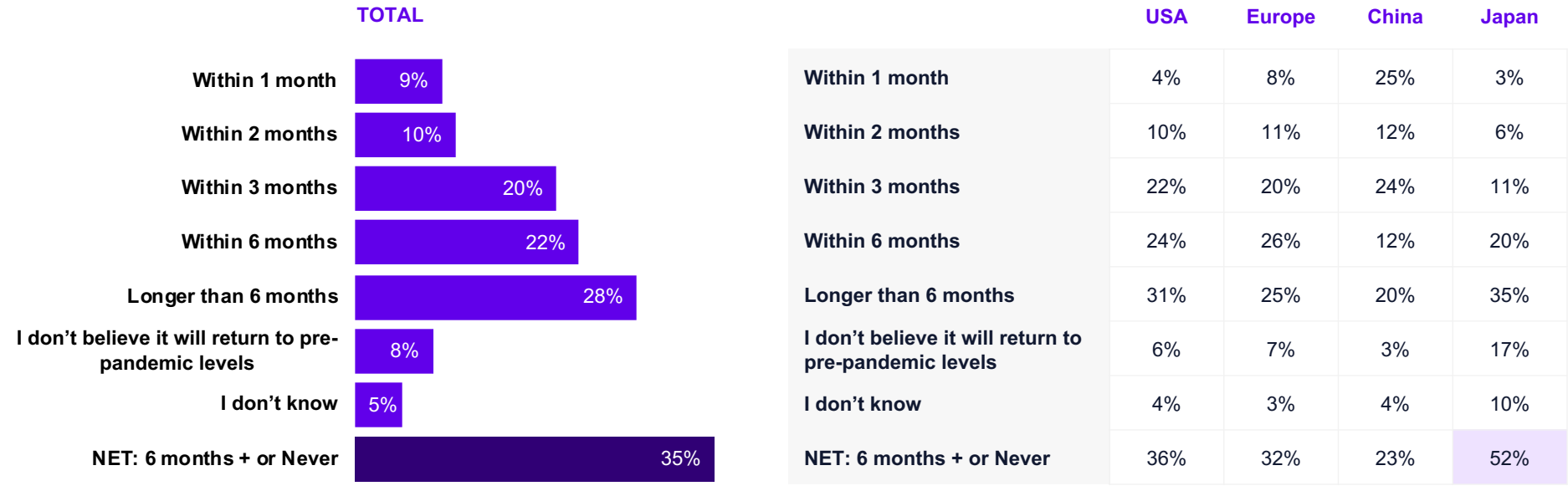
Country	Sample
United States	382
Japan	200
China	182
Great Britain	96
Italy	92
Spain	91
Germany	84
France	82
Specialty	Sample
Dermatology	226
Internal Medicine	212
Cardiology	205
Rheumatology	203
Hematology	193
Oncology	170

Timing for physician bounce-back to pre-pandemic patient activity levels



Over 1/3 of physicians believe their practice will take longer than 6 months OR will never to return to pre-pandemic levels; fears are worse in Japan

HOW QUICKLY WILL PRACTICE ACTIVITY BOUNCE BACK



	Total	USA	EUR	CHN	JPN
Base Sizes, n=	1,209	382	445	182	200

The impact on practice activity is rather consistent across specialties, though Dermatologists fear the more lasting negative outcomes on activity

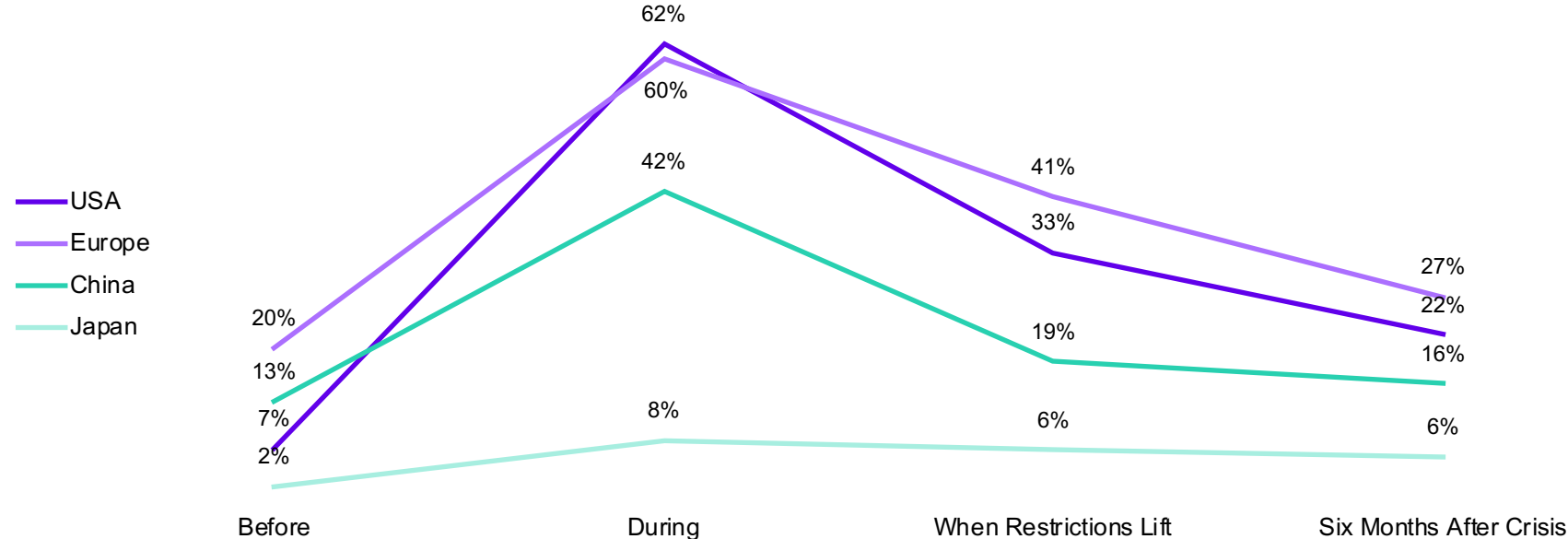
HOW QUICKLY WILL PRACTICE ACTIVITY BOUNCE BACK

	Card	Derm	Hema	Onc	IM	Rheum
Within 1 month	10%	7%	6%	8%	11%	9%
Within 2 months	10%	9%	12%	11%	7%	10%
Within 3 months	22%	14%	19%	25%	19%	21%
Within 6 months	20%	26%	23%	19%	22%	22%
Longer than 6 months	28%	32%	28%	26%	25%	27%
I don't believe it will return to pre-pandemic levels	5%	9%	5%	6%	12%	7%
I don't know	4%	4%	6%	5%	4%	5%
NET: 6 months + or Never	33%	41%	34%	32%	37%	33%

	Total	Card	Derm	Hema	Onc	IM	Rheum
Base Sizes, n=	1,209	205	226	193	170	212	203

Telehealth has made up most consultations in the US and Europe during the pandemic; Japan has had very little remote patient consultations

SHARE OF PATIENT CONSULTATIONS OCCURRING AS REMOTE/TELEHEALTH BY CRISIS PHASE

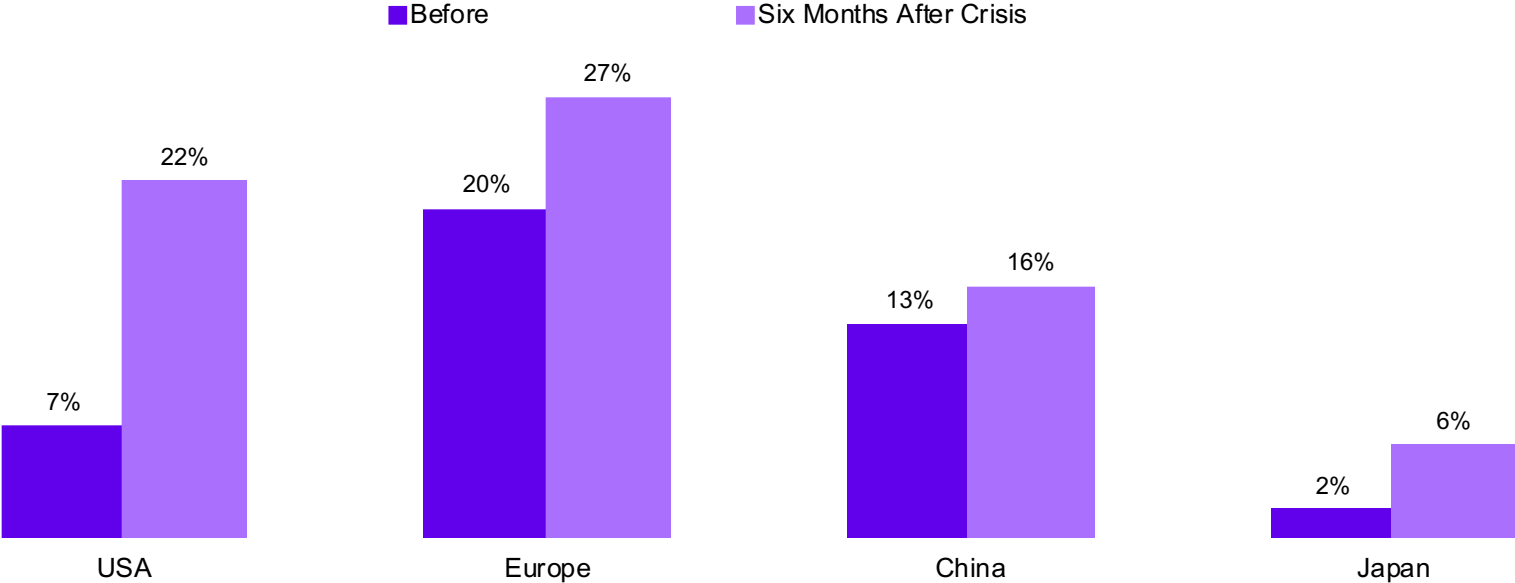


Q3/Q4/Q5 How many patient consultations are you doing each week right now/will you be doing when stay-at-home guidance/restrictions are lifted/six months after the immediate crisis? How many are in-person? How many are remote/tele-health?

	Total	USA	EUR	CHN	JPN
Base Sizes, n=	1,209	382	445	182	200

The greatest lasting impact of the COVID-19 crisis is that physicians in the US will “catch up” to Europe in terms of using Telehealth

SHARE OF PATIENT CONSULTATIONS OCCURRING AS REMOTE/TELEHEALTH BY CRISIS PHASE

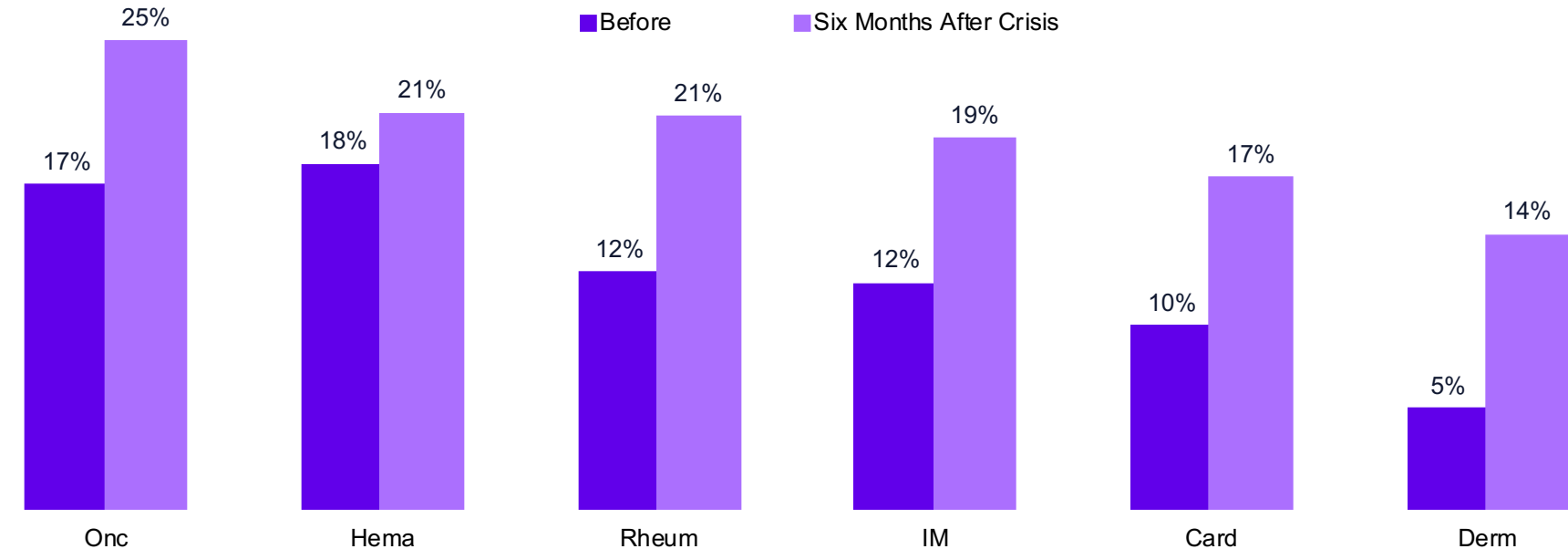


Q3/Q4/Q5 How many patient consultations are you doing each week right now/will you be doing when stay-at-home guidance/restrictions are lifted/six months after the immediate crisis? How many are in-person? How many are remote/tele-health?

	Total	USA	EUR	CHN	JPN
Base Sizes, n=	1,209	382	445	182	200

Specialists shared similar trends of Telehealth consultation; in the future, specialists with more at-risk patients will have higher share of remote consultations

SHARE OF PATIENT CONSULTATIONS OCCURRING AS REMOTE/TELE-HEALTH BY CRISIS PHASE

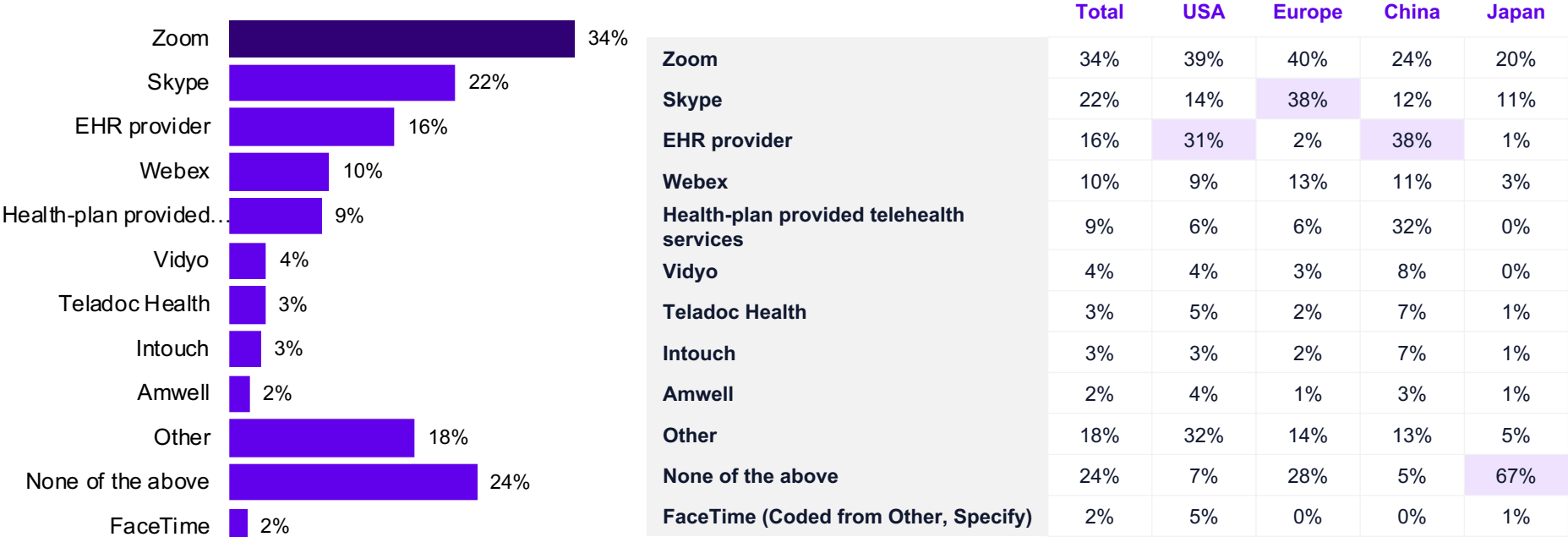


Q3/Q4/Q5How many patient consultations are you doing each week right now/will you be doing when stay-at-home guidance/restrictions are lifted/six months after the immediate crisis? How many are in-person? How many are remote/tele-health?

	Card	Derm	Hema	Onc	IM	Rheum
Base Sizes, n=	205	226	193	170	212	203

Zoom is widely used across markets, while Skype and EHR-provided platforms vary

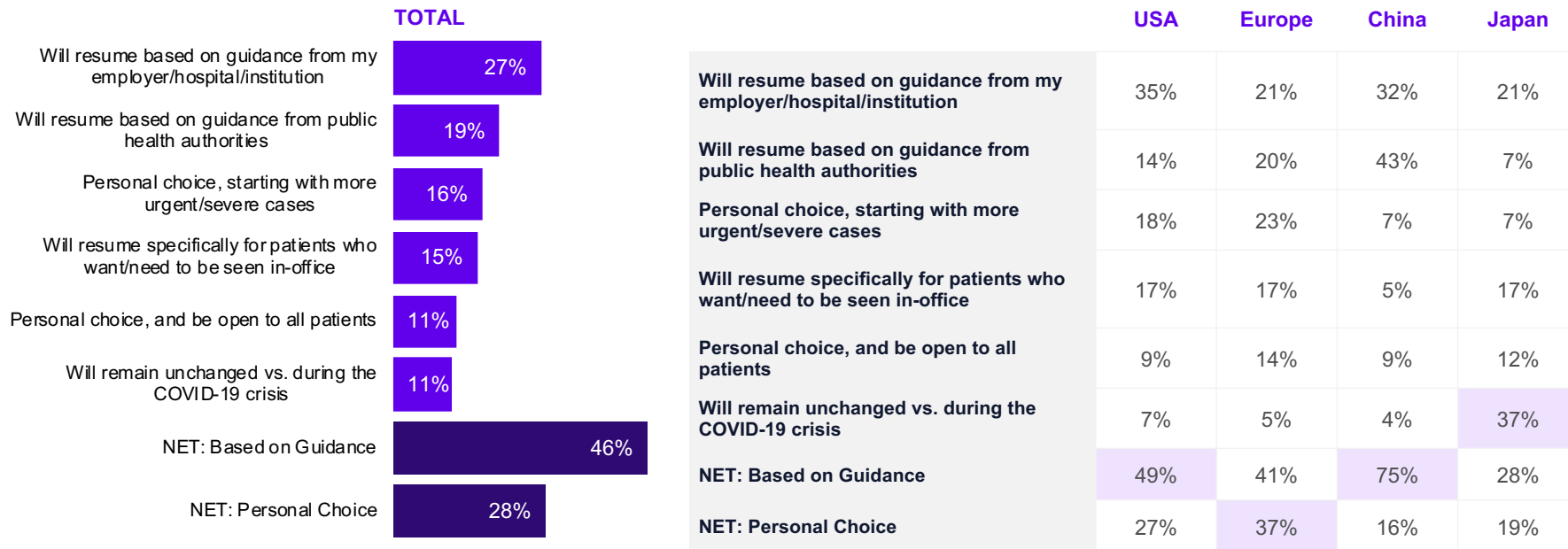
TELEMEDICINE PLATFORMS CURRENTLY USED



	Total	USA	EUR	CHN	JPN
Base Sizes, n=	1,209	382	445	182	200

Generally, physicians will look for guidance when resuming in-office appointments; Europe will have higher share of personal choice

PLANNING WHEN TO RESUME IN-OFFICE APPOINTMENTS

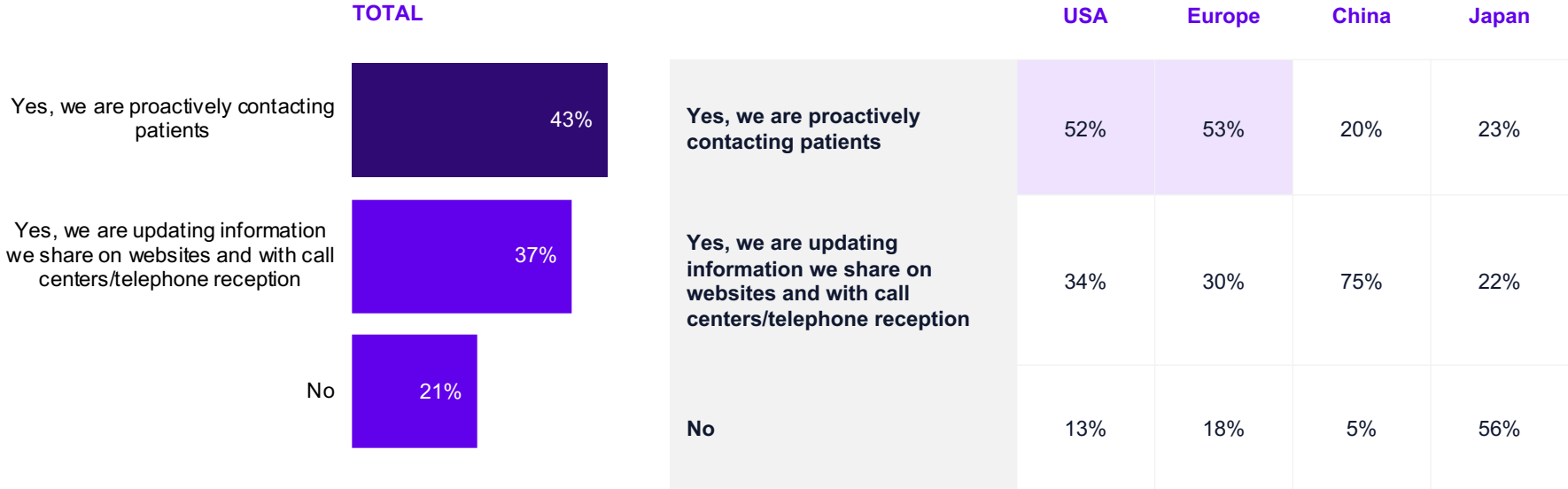


Q8. Which statement best describes your expectation on how your day-to-day work will change as the crisis subsides?

	Total	USA	EUR	CHN	JPN
Base Sizes, n=	1,209	382	445	182	200

Over half of physicians in the US and Europe are proactively contacting patients about reopening as restrictions are lifted

EFFORT TO COMMUNICATE WITH PATIENTS ABOUT REOPENING



Q10. Are you communicating with your patients about reopening as restrictions are lifted?

	Total	USA	EUR	CHN	JPN
Base Sizes, n=	1,209	382	445	182	200

Oncologists and Hematologists are the most proactive for contacting patients about reopening

EFFORT TO COMMUNICATE WITH PATIENTS ABOUT REOPENING

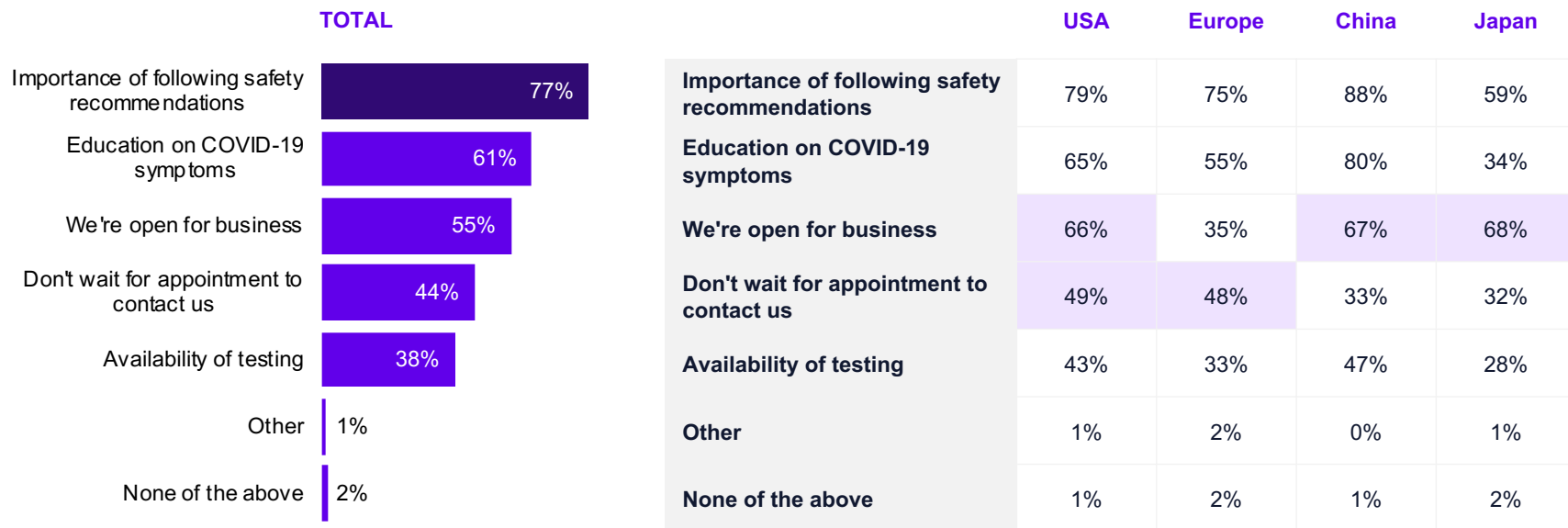
	Card	Derm	Hema	Onc	IM	Rheum
Yes, we are proactively contacting patients	38%	44%	46%	48%	37%	44%
Yes, we are updating information we share on websites and with call centers/telephone reception	36%	36%	37%	35%	37%	39%
No	26%	20%	18%	16%	26%	17%

Q10. Are you communicating with your patients about reopening as restrictions are lifted?

	Total	Card	Derm	Hema	Onc	IM	Rheum
Base Sizes, n=	1,209	205	226	193	170	212	203

Safety is the top message communicated, while nearly half of offices in the US and Europe are proactively asking for patients to set up appointments

MESSAGES COMMUNICATED TO PATIENTS



Over half of Cardiologists are asking patients to not delay making appointments

MESSAGES COMMUNICATED TO PATIENTS

	Card	Derm	Hema	Onc	IM	Rheum
Importance of following safety recommendations	80%	79%	75%	75%	79%	76%
Education on COVID-19 symptoms	58%	61%	65%	61%	66%	55%
We're open for business	54%	57%	48%	53%	57%	57%
Don't wait for appointment to contact us	53%	42%	46%	44%	40%	41%
Availability of testing	44%	22%	39%	43%	54%	32%
Other	0%	2%	1%	1%	1%	2%
None of the above	1%	2%	3%	1%	1%	1%

	Total	Card	Derm	Hema	Onc	IM	Rheum
Base Sizes, n=	958	151	180	159	142	157	169

What does this mean for the healthcare industry?

Key findings

- Physicians are cautiously optimistic about returning to pre-pandemic activity; many worry about lasting impacts on their business
- Many are being aggressive to build up the business (e.g. proactively contacting patients about reopening)
- While safety is the top message communicated, nearly half of US & European offices are proactively asking for patients to set up appointments
- Telehealth has comprised most of all patient consultation since crisis began
- All markets will see a lasting increase in Telehealth, particularly in the US with a 3X increase in share of consultations expected to be performed remotely

Implications for industry

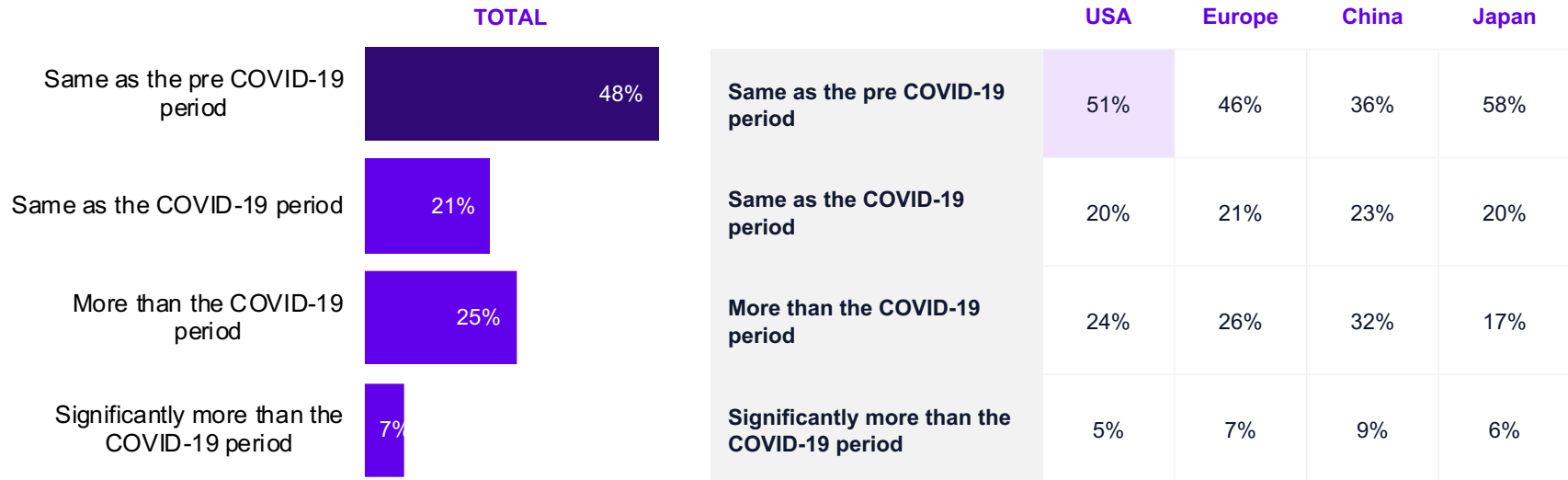
- Consider new ways to meet HCPs online as they adopt digital tools more rapidly than ever
- Now that the point of prescription is more so taking place digitally, consider new tools to educate on treatment options
- Specialty-specific nuances are key to informing your marketing strategy – invest in data to understand your key market and build a customized, personalized approach

How changes in physician practice activity impact HCP access & your business



Half of physicians in the US expect the number of conversations with sales reps to return to pre-COVID-19 levels

CHANGE IN NUMBER OF CONVERSATIONS WITH SALES REPS AFTER COVID-19 RESTRICTIONS ARE LIFTED



Q35. Once stay-at-home guidance and similar restrictions are lifted (i.e., during recovery from the immediate crisis)... How many conversations (total in-office and remote) do you expect to have with pharmaceutical sales representatives per week?

	Total	USA	EUR	CHN	JPN
Base Sizes, n=	1,209	382	445	182	200

Oncology is the one specialty with less than half of physicians expecting conversations with sales reps to return to pre-COVID-19 levels

CHANGE IN NUMBER OF CONVERSATIONS WITH SALES REPS AFTER COVID-19 RESTRICTIONS ARE LIFTED

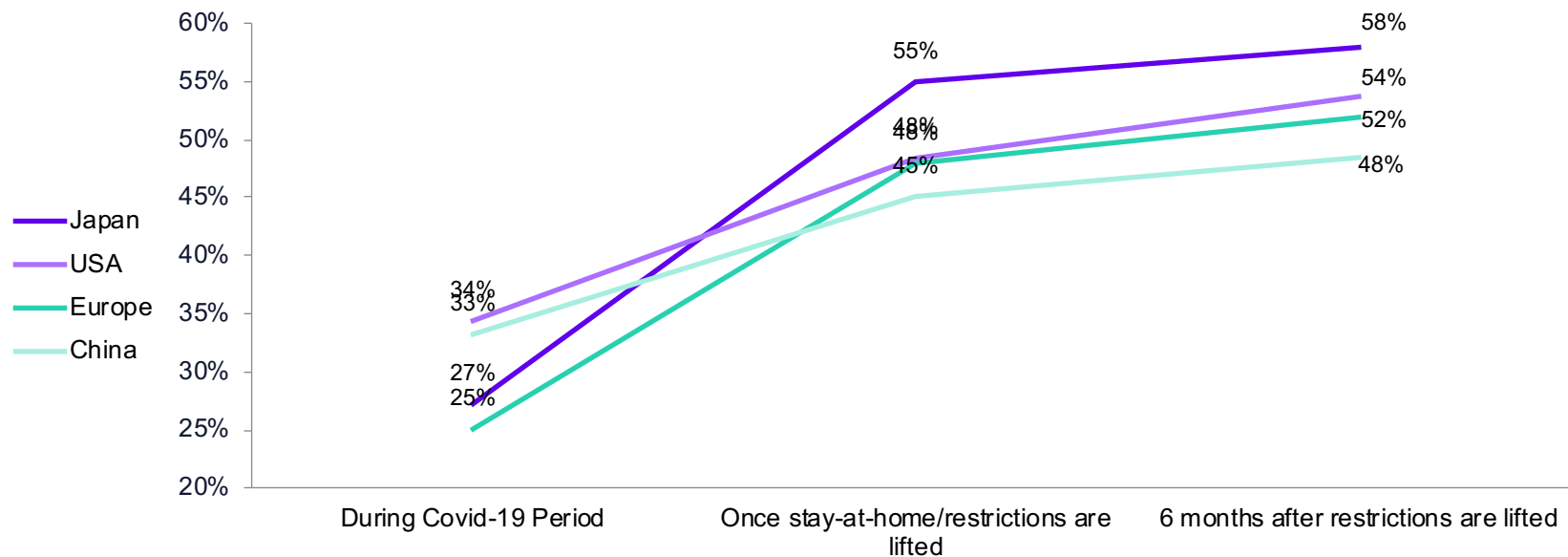
	Card	Derm	Hema	Onc	IM	Rheum
Same as the pre COVID-19 period	49%	47%	49%	40%	57%	45%
Same as the COVID-19 period	20%	17%	20%	26%	19%	23%
More than the COVID-19 period	28%	29%	24%	24%	18%	25%
Significantly more than the COVID-19 period	3%	7%	8%	9%	5%	7%

Q35. Once stay-at-home guidance and similar restrictions are lifted (i.e., during recovery from the immediate crisis)... How many conversations (total in-office and remote) do you expect to have with pharmaceutical sales representatives per week?

	Total	Card	Derm	Hema	Onc	IM	Rheum
Base Sizes, n=	1,209	205	226	193	170	212	203

Physicians expect a little more than half of conversations with sales reps to be in-person 6 months after restrictions are lifted, though slightly lower in China

SHARE OF CONVERSATIONS WITH SALES REPS IN-PERSON DURING AND AFTER COVID-19 PERIOD

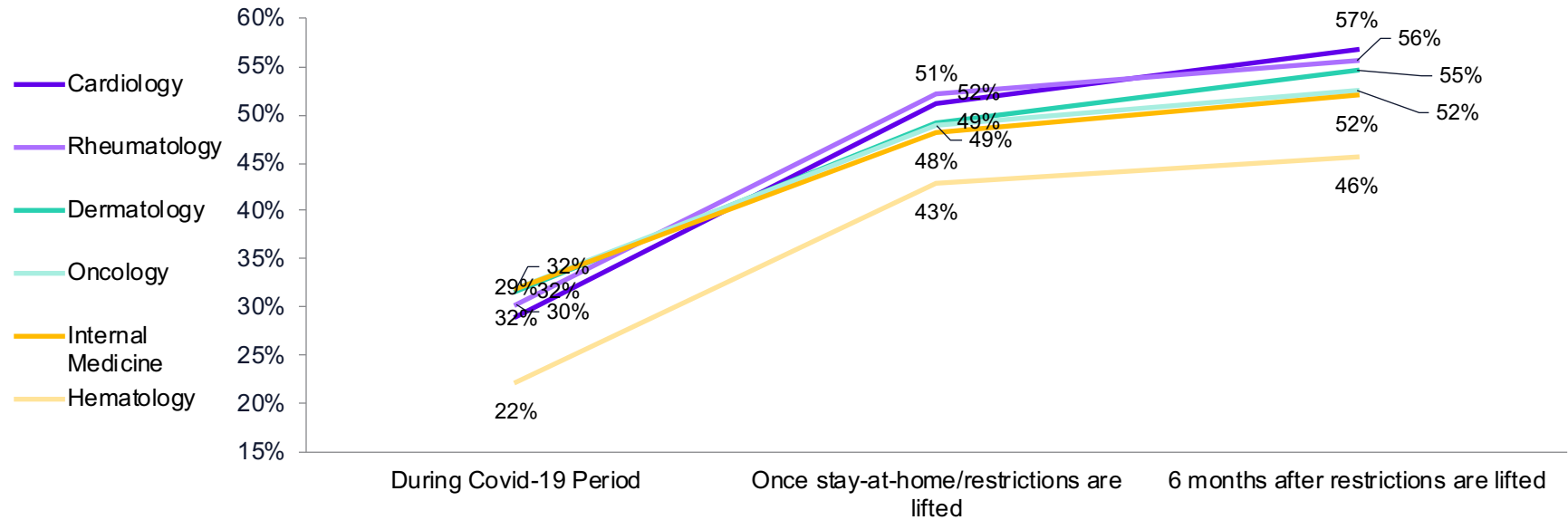


Q34. Thinking about the time during the Covid-19 period...
What share of your conversations are/were in-office?

	Total	USA	EUR	CHN	JPN
Base Sizes, n=	1,209	382	445	182	200

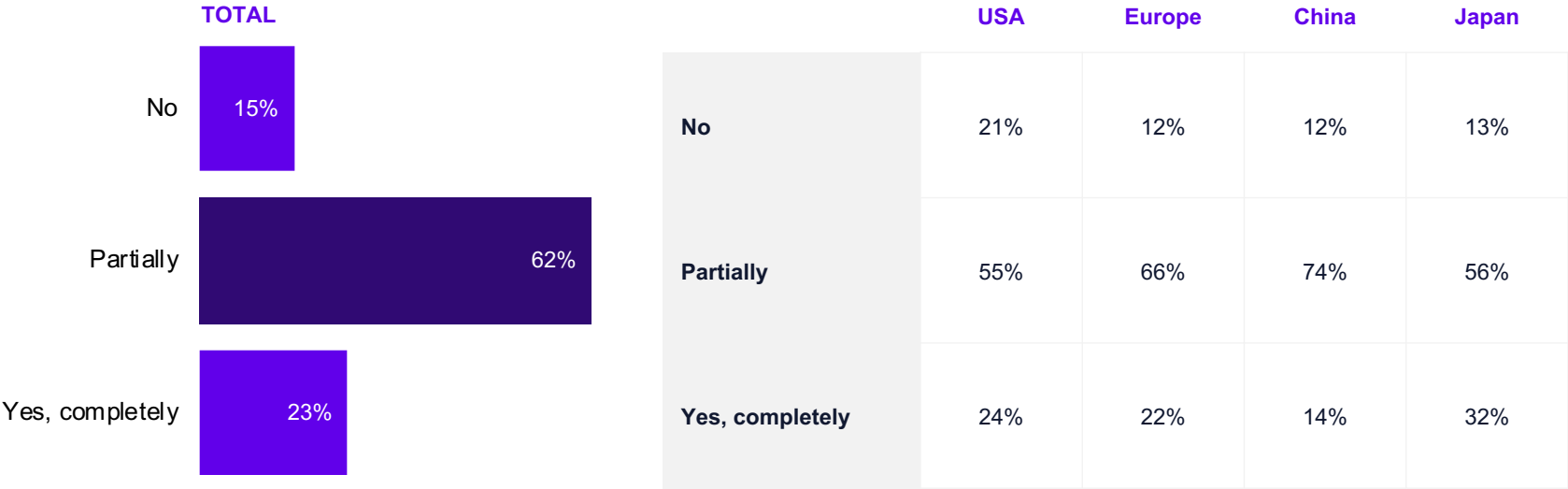
Cardiologists, Rheumatologists and Dermatologists expect over half of future conversations will be in-person; Hematologists expect less than half to be in-person

SHARE OF CONVERSATIONS WITH SALES REPS IN-PERSON DURING AND AFTER COVID-19 PERIOD



Nearly two-thirds of physicians expect representatives to only be partially allowed access for in-office meetings

EXPECTATIONS OF PHARMA REPS BEING ALLOWED ACCESS FOR IN-OFFICE MEETINGS ONCE RESTRICTIONS HAVE LIFTED



Q37. Once state or other restrictions have been lifted, do you expect pharmaceutical sales representatives will be allowed access to your practice/institution for in-office meetings?

	Total	USA	EUR	CHN	JPN
Base Sizes, n=	1,209	382	445	182	200

Among specialties, we find little difference in expectations about representatives getting access for in-office meetings

EXPECTATIONS OF PHARMA REPS BEING ALLOWED ACCESS FOR IN-OFFICE MEETINGS ONCE RESTRICTIONS HAVE LIFTED

	Total	Card	Derm	Hema	Onc	IM	Rheum
No	15%	13%	18%	17%	17%	13%	12%
Partially	62%	61%	59%	63%	63%	58%	67%
Yes, completely	23%	25%	23%	20%	20%	30%	21%

Q37. Once state or other restrictions have been lifted, do you expect pharmaceutical sales representatives will be allowed access to your practice/institution for in-office meetings?

	Total	Card	Derm	Hema	Onc	IM	Rheum
Base Sizes, n=	1,209	205	226	193	170	212	203

The reason for those who expect to not have reps welcomed back is due to pre-crisis restrictions in the US, and to changes arising after the crisis in Europe

REASONS PHARMA REPS WOULDN'T BE WELCOMED



Q38. (If answered No in Q37) Please explain why pharmaceutical sales representatives wouldn't be welcomed (Select all that apply)

	Total	USA	EUR	CHN	JPN
Base Sizes, n=	179	79	53	22	25

Among those who will not welcome sales reps, most will allow other industry personal, especially medical affairs representatives, for in-office meetings

OTHER PHARMACEUTICAL REPRESENTATIVES (BEYOND SALES REPRESENTATIVES) TO BE ALLOWED ACCESS FOR IN-OFFICE MEETINGS

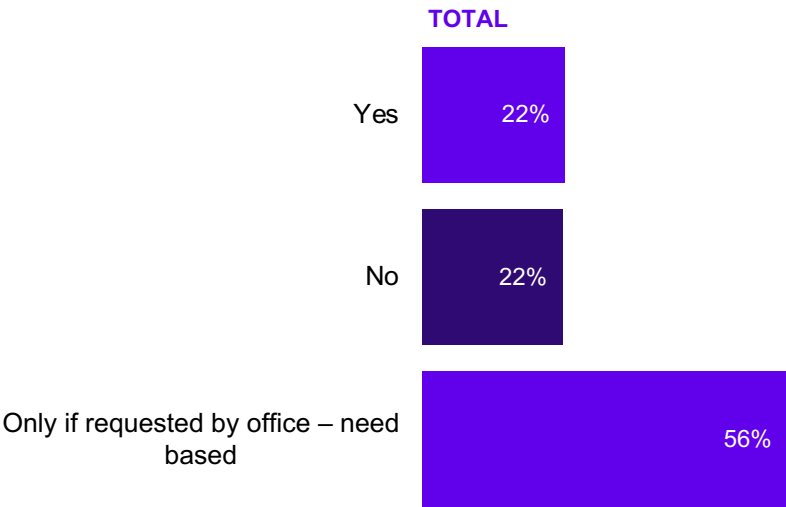


Q39. Do you expect other pharmaceutical representatives (beyond sales representatives) will be allowed access to your practice/institution for in-office meetings? Please check all that apply

	Total	USA	EUR	CHN	JPN
Base Sizes, n=	179	79	53	22	25

Just one-in-five of physicians think that pharma should avoid sending sales reps for in-office meetings under any circumstances

SHOULD PHARMA BE SENDING SALES REPS INTO THE OFFICE IMMEDIATELY AFTER THE CRISIS?



	USA	Europe	China	Japan
Yes	20%	25%	22%	21%
No	20%	27%	11%	22%
Only if requested by office – need based	60%	48%	67%	58%

	Total	USA	EUR	CHN	JPN
Base Sizes, n=	1,209	382	445	182	200

Among specialties, Hematologists have stronger belief (27%) that pharma should avoid sending sales reps for in-office meetings under any circumstances

SHOULD PHARMA BE SENDING SALES REPS INTO THE OFFICE IMMEDIATELY AFTER THE CRISIS?

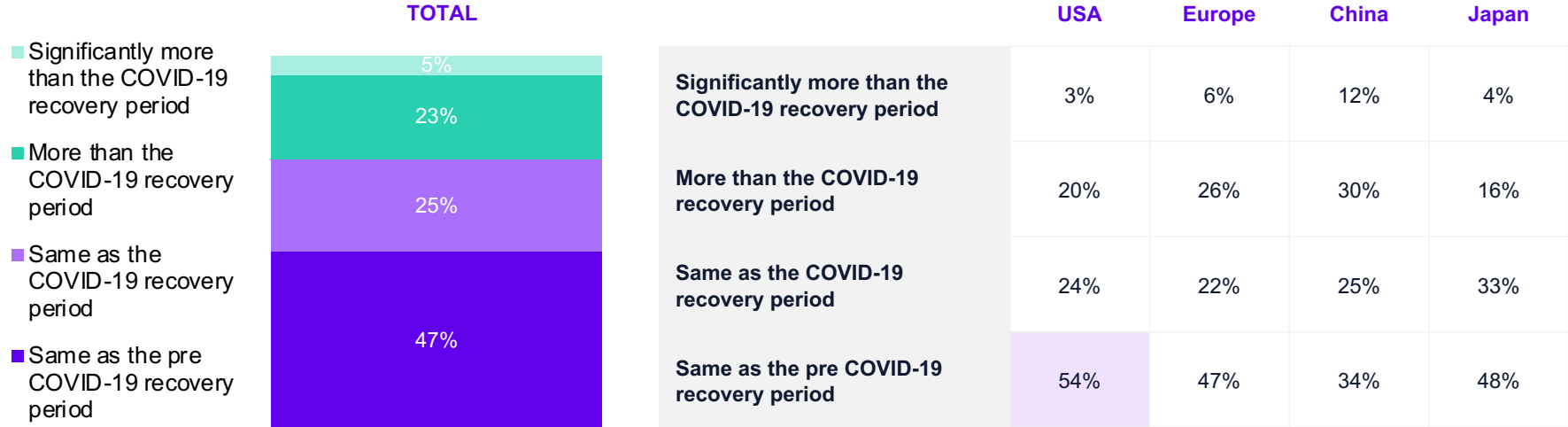
	Total	Card	Derm	Hema	Onc	IM	Rheum
Yes	22%	23%	24%	17%	22%	30%	16%
No	22%	19%	16%	27%	22%	23%	25%
Only if requested by office – need based	56%	58%	60%	56%	55%	48%	60%

Q40. Irrespective of employer or practice guidance on allowing access to sales reps, should pharma be sending sales reps into the office immediately after the crisis?

	Total	Card	Derm	Hema	Onc	IM	Rheum
Base Sizes, n=	1,209	205	226	193	170	212	203

Over half of physicians in the US expect the number of conversations with sales reps to return to pre-COVID-19 levels six months after restrictions are lifted

EXPECTED CONVERSATIONS PER WEEK WITH PHARMA SALES REPS 6 MONTHS AFTER RESTRICTIONS LIFTED



Q41. Thinking forward to 6 months after stay at home or similar restrictions are needed... How many conversations (total in-office and remote) do you expect to have with pharmaceutical sales representatives in a typical week?

	Total	USA	EUR	CHN	JPN
Base Sizes, n=	1,209	382	445	182	200

Oncologists have the lowest expectation of the number of conversations with sales reps to return to pre-COVID-19 levels six months after restrictions are lifted

EXPECTED CONVERSATIONS PER WEEK WITH PHARMA SALES REPS 6 MONTHS AFTER RESTRICTIONS LIFTED

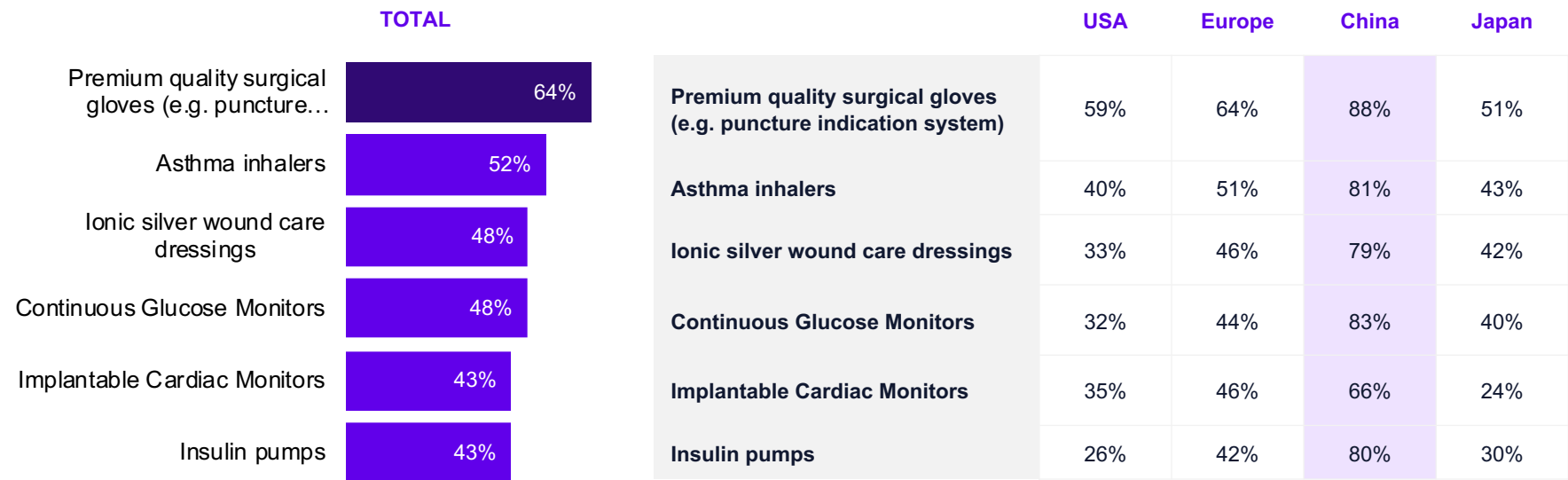
	Card	Derm	Hema	Onc	IM	Rheum
Significantly more than the COVID-19 recovery period	4%	6%	7%	5%	5%	4%
More than the COVID-19 recovery period	23%	26%	20%	25%	18%	26%
Same as the COVID-19 recovery period	21%	21%	26%	30%	25%	27%
Same as the pre COVID-19 recovery period	52%	47%	47%	40%	53%	43%

Q41. Thinking forward to 6 months after stay at home or similar restrictions are needed... How many conversations (total in-office and remote) do you expect to have with pharmaceutical sales representatives in a typical week?

	Total	Card	Derm	Hema	Onc	IM	Rheum
Base Sizes, n=	1,209	205	226	193	170	212	203

Physicians in China expect greater need to purchase a wide range of medical devices over the next six months

NECESSARY DEVICE PURCHASES OVER NEXT SIX MONTHS



Q43. Thinking ahead, over the next 6 months, how necessary will it be for your practice to purchase the following medical devices? (Not Applicable Excluded)

	Total	USA	EUR	CHN	JPN
Avg. Base Size, n=	967	245	371	178	174

All specialties show similar needs for device purchasing over the next six months

NECESSARY DEVICE PURCHASES OVER NEXT SIX MONTHS

	Card	Derm	Hema	Onc	IM	Rheum
Premium quality surgical gloves (e.g. puncture indication system)	59%	65%	67%	64%	67%	64%
Asthma inhalers	53%	37%	50%	51%	69%	50%
Ionic silver wound care dressings	42%	51%	44%	47%	55%	48%
Continuous Glucose Monitors	48%	36%	44%	45%	63%	47%
Implantable Cardiac Monitors	63%	25%	41%	43%	43%	38%
Insulin pumps	43%	34%	42%	39%	52%	47%

Q43. Thinking ahead, over the next 6 months, how necessary will it be for your practice to purchase the following medical devices? (Not Applicable Excluded)

	Total	Card	Derm	Hema	Onc	IM	Rheum
Avg. Base Size, n=	967	174	158	155	152	176	153

What does this mean for the healthcare industry?

Key findings

- Physicians are split on whether conversations with sales reps will return to pre-COVID-19 levels, though China and some specialties (Oncologists and Rheumatologists) have lower expectations
- In-person interactions will make up just over half of meetings in "the new normal"
- One-in-five of physicians think that pharma should avoid sending sales reps for in-office meetings under any circumstances as restrictions are lifted - and the majority feel visits should be need-based/only as requested
- We see strong purchasing signals for medical device companies, particularly in China

Implications for industry

- Build a comprehensive virtual meeting strategy to offset declines in pharma rep meetings
- It is important to create a need for physicians to meet with sales reps – how do we do this? Should there be deeper levels of collaboration across business units?
- With practice re-openings here/on the horizon, medical device companies can help physicians prepare by digitally promoting available supplies

Thank you!

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



APPENDIX

Specialty Deep-dives:

Oncologists, Hematologists, Rheumatologists,
Cardiologists, Dermatologists & Internal Medicine



Restrictions at infusion sites varied by market – Japan had lowest level of restrictions; China had highest level of restrictions

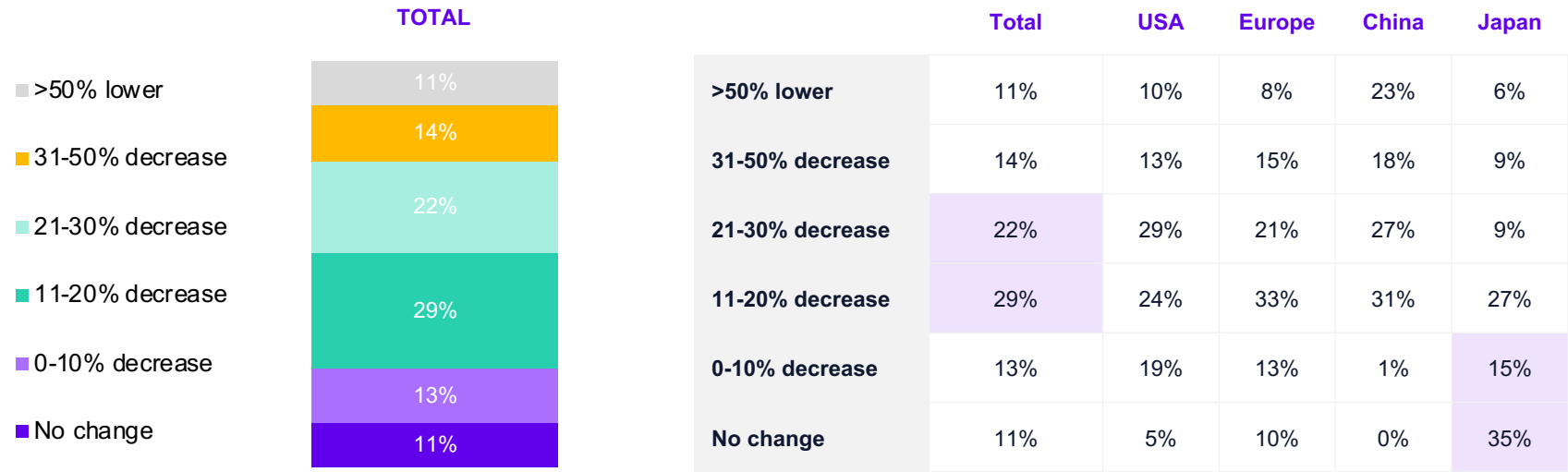
RESTRICTIONS IMPOSED ON INFUSION SITES TYPICALLY USED



	Total	USA	EUR	CHN	JPN
Base Sizes, n=	566	159	221	91	95

Half of physicians report between 11-30% decrease in infusions during COVID-19 period, except in Japan where they report little to no decrease

COVID-19 IMPACT ON NUMBER OF INFUSIONS

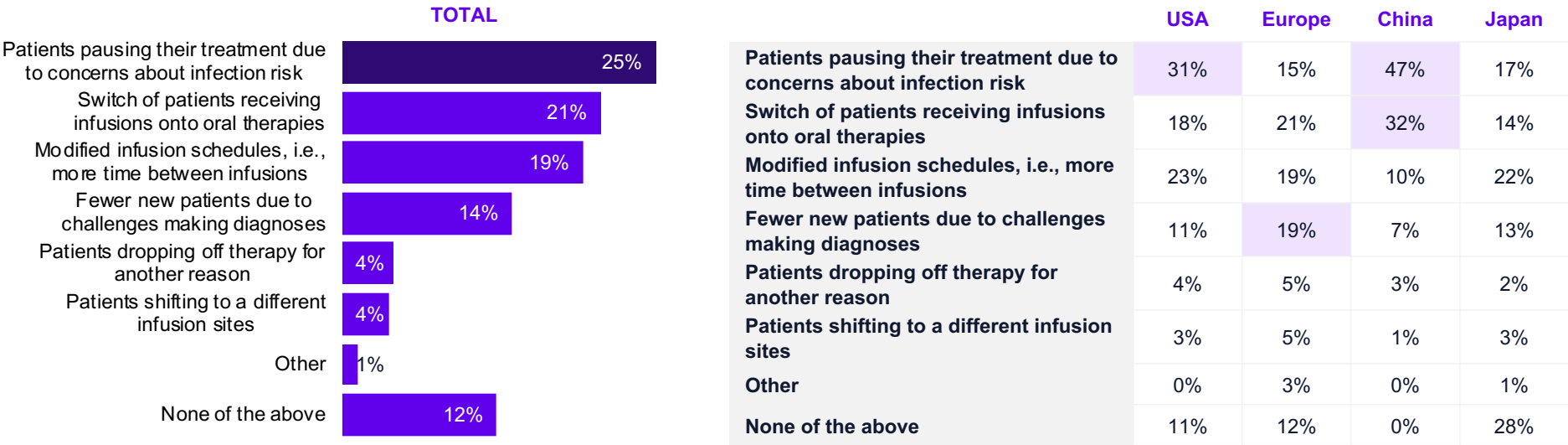


Q13. (Oncologists, Hematologists or Rheumatologists) What has been impact on overall number of infusions being administered across all the patients you treat? Answer in terms of the change in number of infusions per month compared to pre-crisis:

	Total	USA	EUR	CHN	JPN
Base Sizes, n=	542	150	215	88	89

The top drivers for the reason infusions have decreased vary by market; Infection risks weigh most on patients pausing treatment in China

TOP DRIVERS OF CHANGE IN PATIENT INFUSIONS

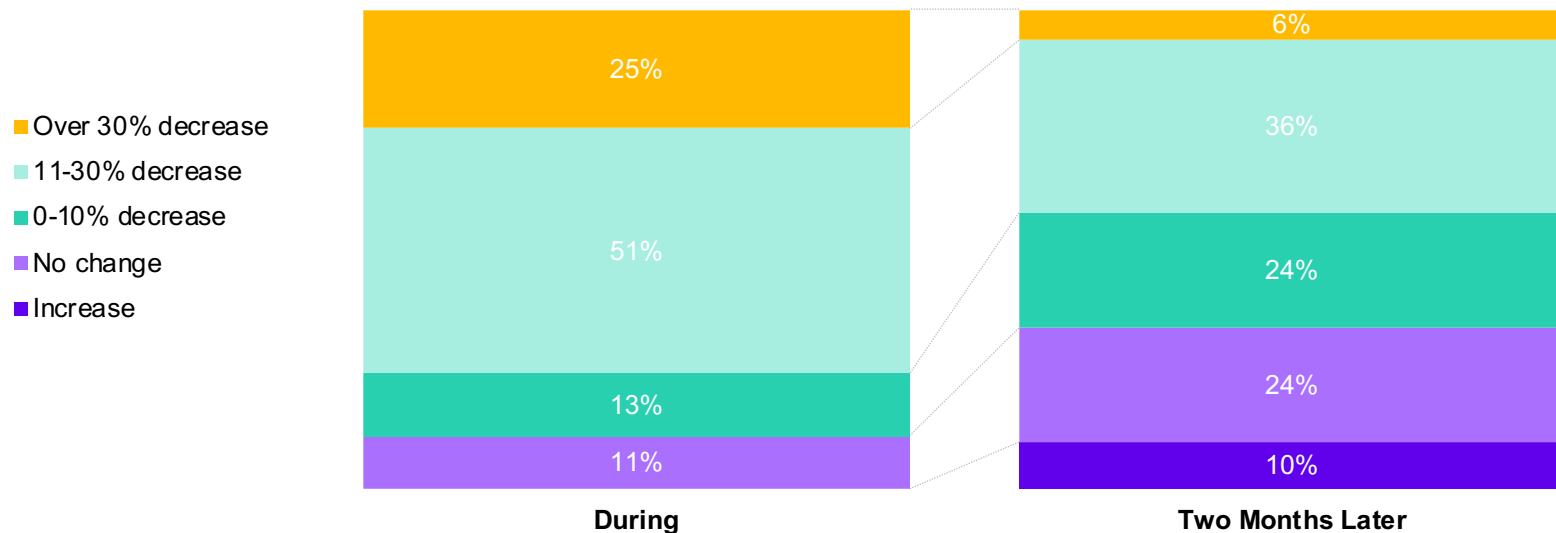


Q14. (Oncologists, Hematologists or Rheumatologists) - SELECTED TOP-1 - What have been the drivers of change in overall number of infusions being administered across all the patients you treat? Rank the top-3 from the following list

	Total	USA	EUR	CHN	JPN
Base Sizes, n=	566	159	221	91	95

Physicians see a moderate bounce back in infusions soon after restrictions are lifted, but over 4-in-10 (42%) still see moderate to high decrease

COVID-19 IMPACT ON NUMBER OF INFUSIONS - DURING CRISIS TO TWO MONTHS LATER

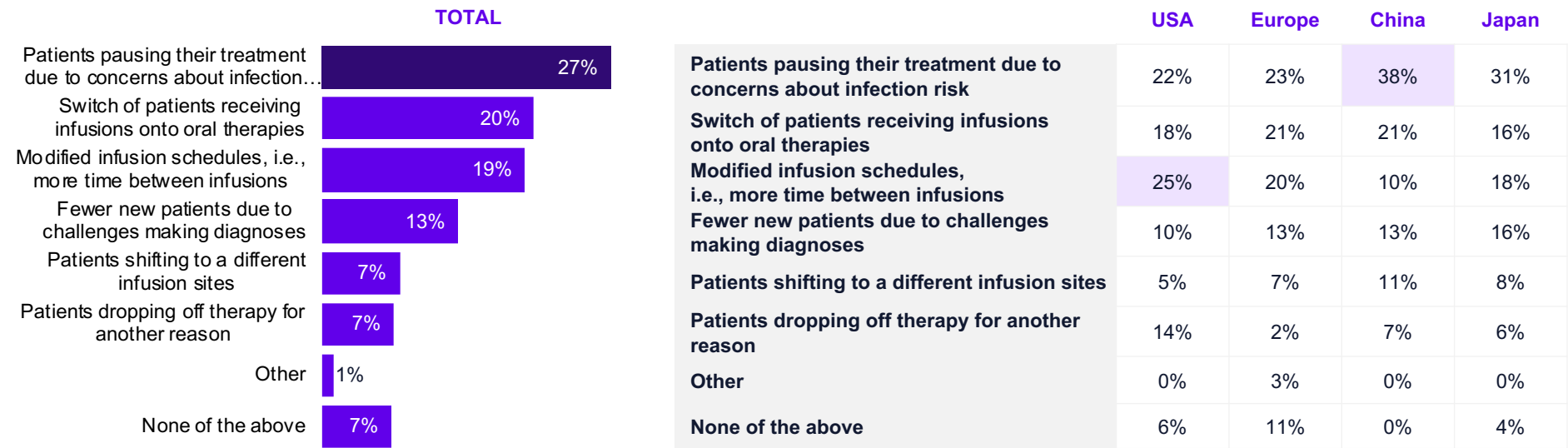


Q13. (Oncologists, Hematologists or Rheumatologists) What has been impact on overall number of infusions being administered across all the patients you treat? Answer in terms of the change in number of infusions per month compared to pre-crisis; Q15. What do you expect will be the overall number of infusions being administered across all your patients once restrictions are lifted in the next 1-2 months?

	Total	USA	EUR	CHN	JPN
Base Sizes, n=	542	150	215	88	89

Several underlying reasons for changes in infusion volume in the near-future, with fear of COVID-19 infection being moderately high only in China

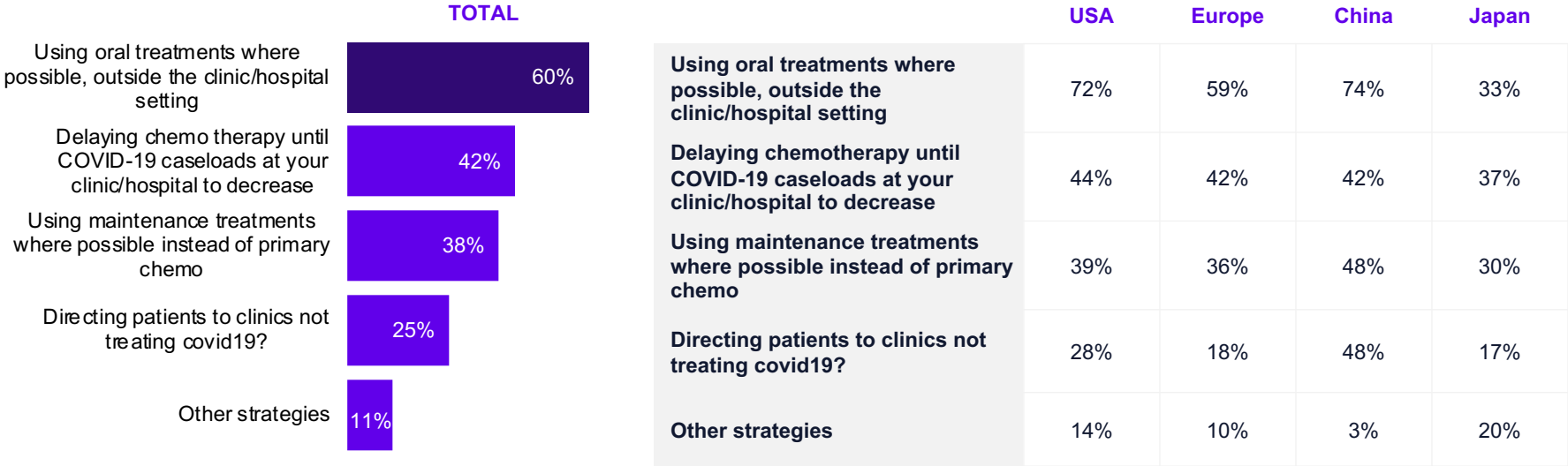
TOP DRIVERS OF EXPECTED FUTURE CHANGE IN PATIENT INFUSIONS



	Total	USA	EUR	CHN	JPN
Base Sizes, n=	400	108	159	84	49

The majority of Oncologists are turning to oral treatments for managing their cancer patients

MANAGING CANCER PATIENTS DURING COVID-19 CRISIS



	Total	USA	EUR	CHN	JPN
Base Sizes, n=	170	36	73	31	30

Cardiologists in US & Europe report different needs for treating patients: Europe notes delay/postponement of elective treatment, US notes difficulty visiting sick patients

UNMET TREATMENT NEEDS FOR CARDIAC PATIENTS



Q20. (Cardiologists) (Selected in #1) Where is the greatest unmet need in the treatment of cardiac patients given the COVID crisis? Rank the top-3 from the following list

	Total	USA	EUR	CHN	JPN
Base Sizes, n=	205	67	78	30	30

When onboarding Psoriasis patients, Dermatologists show relatively equal application of the top-6 treatments, with a slight differences between US and Europe

DERMATOLOGISTS: DRUGS USED FOR ONBOARDING PSORIASIS PATIENTS

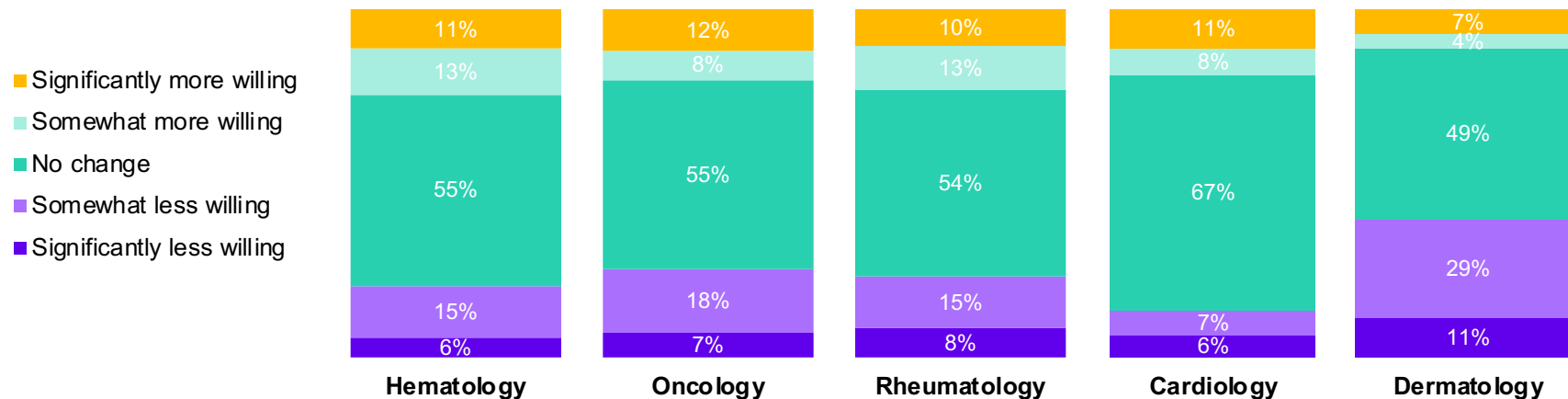


Q28. (Bermatologists) Regarding the onboarding of new psoriasis patients, for which of the following are you currently using samples, free drug programs and other bridge programs to make sure the patients can start treatment while the commercial insurance approval is under review?

	Total	USA	EUR	CHN	JPN
Base Sizes, n=	226	94	66	31	35

Dermatologists express less willingness to adopt/use recently approved drug regimens

WILLINGNESS TO ADOPT/USE DRUG REGIMENTS RECENTLY APPROVED BY FDA

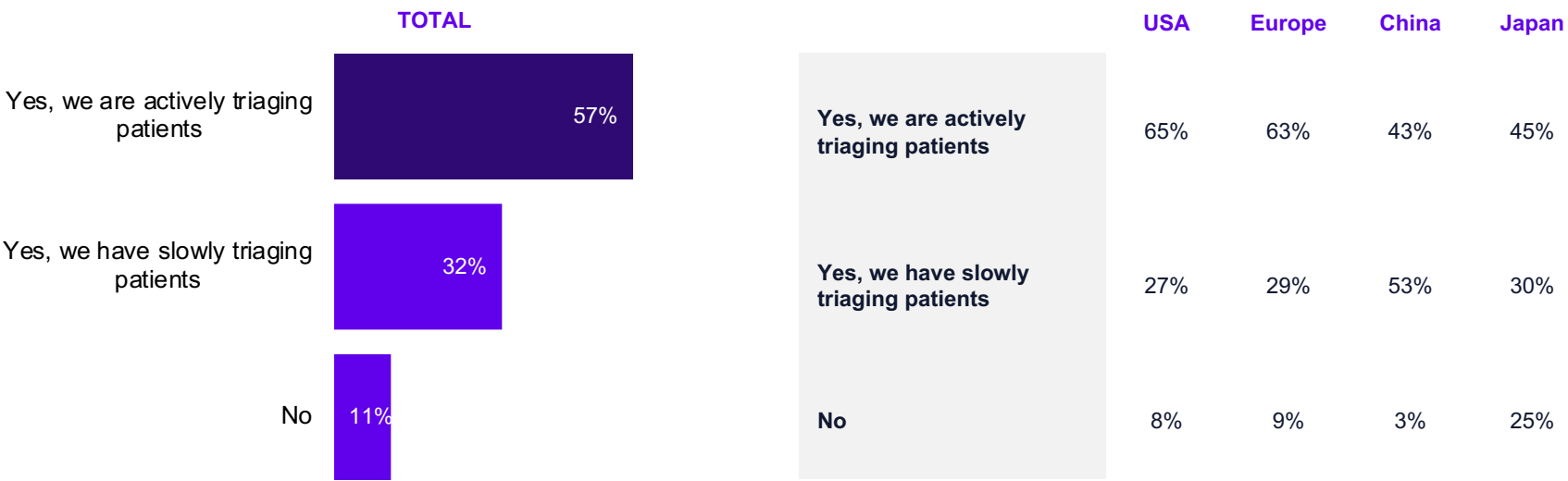


Q18/Q21/Q29. What has been/will be the impact of COVID-19 crisis on your willingness to adopt/use drug regimens recently approved by FDA/Government Agencies?

	Total	USA	EUR	CHN	JPN
Base Sizes, n=	566	159	221	91	95

The majority of GPs are actively triaging returning patients

INTERNAL MEDICINE: PLANNING TO TRIAGE PATIENT RETURN

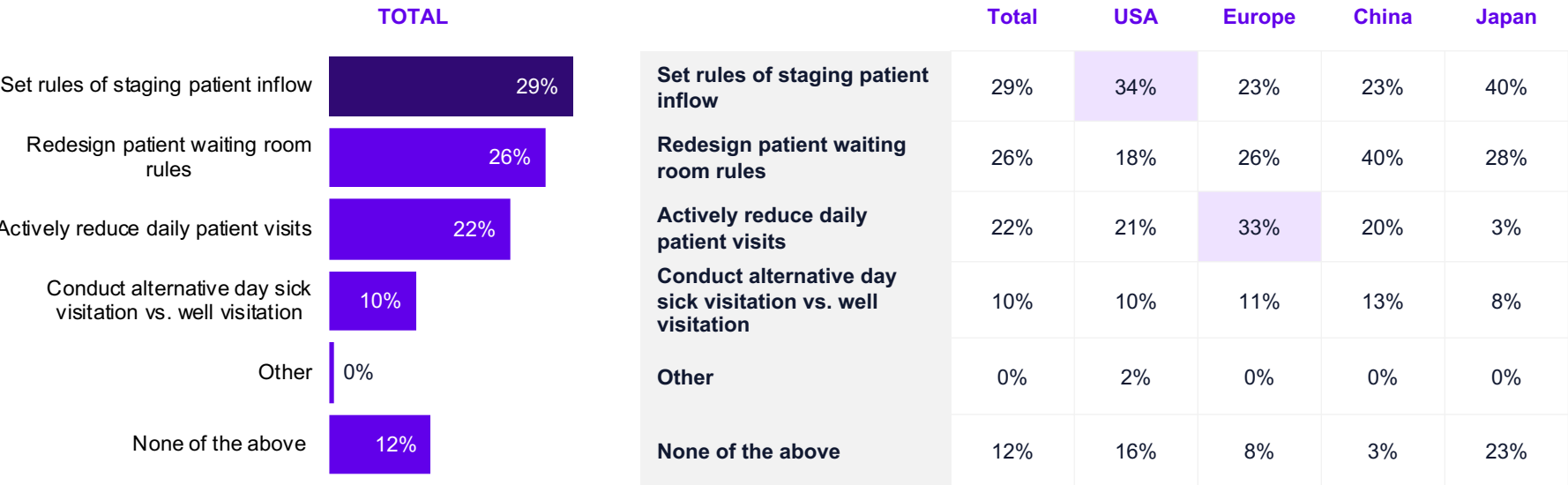


Q31. (Internal Medicine) Once the COVID recovery period has begun, will you be triaging patient return?

	Total	USA	EUR	CHN	JPN
Base Sizes, n=	212	62	80	30	40

GPs in the US are focusing more on setting rules to manage patient inflows, while those in Europe are focusing more on reducing daily visits

INTERNAL MEDICINE: TRIAGING PRIORITY WHEN PATIENTS RETURN



Q32. (Internal Medicine) (Ranked #1) What active triaging steps will you take for patient return in your practice? Please rank the options below where “1” is the most important, “2” is the next most important etc....

	Total	USA	EUR	CHN	JPN
Base Sizes, n=	212	62	80	30	40