COVID-19 HCP Sentiment Series

Part 4: Physician practice activity levels, telehealth adoption and challenges, and the future of pharma engagement

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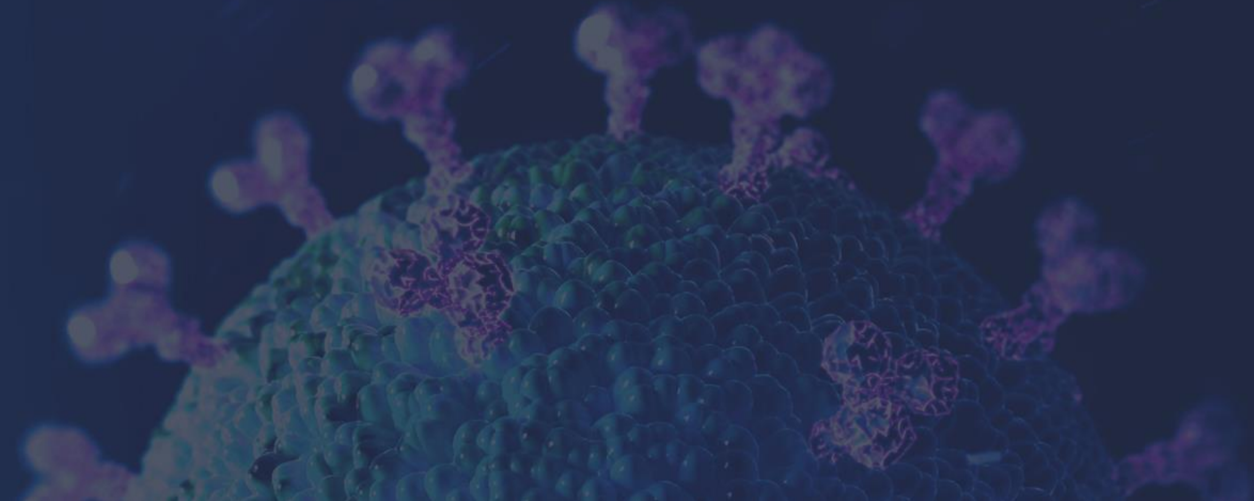

sermo

Sermo's HCP Sentiment Study: Part 4 research overview

- Questions were solicited from Sermo clients between July 31st – Aug 6th
- Questionnaire was developed and programmed by Sermo
- Data collected between July 31st – Aug 6th
- Sermo invited physicians among a list of six specialties across eight countries
- Respondents were not incentivized for their time
- Total sample: 1,705

Country	Sample
United States	642
Japan	171
China	166
Spain	164
Italy	164
Great Britain	145
France	135
Germany	118

Specialty	Sample
Internal Medicine	310
Cardiology	185
Neurology	182
Dermatology	174
Hematology	168
Oncology	167
Urology	149
Rheumatology	140
Endocrinology	127
Pulmonology	103

Section 1:
Physician practice activity levels

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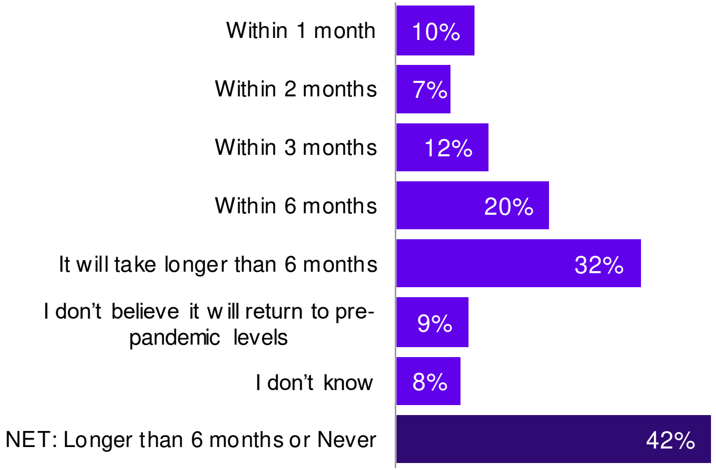
Fears of recovery have gotten worse since mid-May, with over 4-in-10 physicians believing their practice will take >6 months OR never to return to normal

HOW QUICKLY WILL PRACTICE ACTIVITY BOUNCE BACK



	Total	USA	Europe	China	Japan
Within 1 month	10%	11%	11%	14%	1%
Within 2 months	7%	7%	9%	9%	1%
Within 3 months	12%	11%	14%	18%	4%
Within 6 months	20%	23%	19%	28%	9%
It will take longer than 6 months	32%	36%	28%	23%	44%
I don't believe it will return to pre-pandemic levels	9%	6%	11%	4%	21%
I don't know	8%	7%	8%	2%	20%
NET: Longer than 6 months or Never	42%	42%	39%	28%	65%
Mid-May NET: Longer than 6 months or Never	35%	36%	32%	23%	52%

	Total	USA	EUR	CHN	JPN
Base Sizes, n=	1,705	642	726	166	171

Q9. When do you believe your practice activity will return to pre-pandemic levels?

Among specialties, none expect a quick return to normal – with expectations worse than found in Mid-May

HOW QUICKLY WILL PRACTICE ACTIVITY BOUNCE BACK

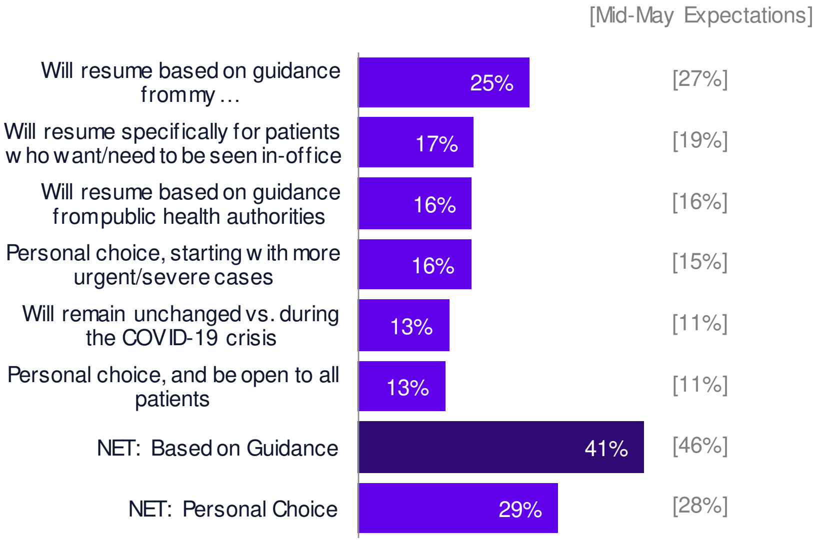
	Total	IM	Card	Derm	Hema	Onc	Endo	Neur	Pulm	Uro	Rheum
Within 1 month	10%	9%	8%	11%	10%	8%	8%	13%	16%	10%	14%
Within 2 months	7%	7%	4%	11%	7%	6%	7%	8%	9%	9%	5%
Within 3 months	12%	10%	15%	11%	13%	17%	9%	10%	15%	10%	13%
Within 6 months	20%	22%	24%	18%	17%	25%	18%	18%	16%	20%	19%
It will take longer than 6 months	32%	32%	32%	36%	36%	26%	34%	31%	28%	34%	32%
I don't believe it will return to pre-pandemic levels	9%	12%	9%	6%	11%	8%	13%	11%	8%	9%	6%
I don't know	8%	7%	7%	7%	6%	10%	11%	10%	10%	7%	11%
NET: Longer than 6 months or Never	42%	44%	41%	41%	47%	34%	46%	42%	36%	43%	39%
Mid-May NET: Longer than 6 months or Never	35%	37%	33%	41%	34%	--	--	--	--	--	33%

Q9. When do you believe your practice activity will return to pre-pandemic levels?

	Total	IM	Card	Derm	Hema	Onc	Endo	Neur	Pulm	Uro	Rheum
Base Sizes, n=	1,705	310	185	174	168	167	127	182	103	149	140

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

PLANNING WHEN TO RESUME IN-OFFICE APPOINTMENTS



	Total	USA	Europe	China	Japan
Will resume based on guidance from my employer/hospital/institution	25%	30%	21%	31%	16%
Will resume specifically for patients who want/need to be seen in-office	17%	17%	18%	9%	16%
Will resume based on guidance from public health authorities	16%	13%	18%	40%	2%
Personal choice, starting with more urgent/severe cases	16%	17%	20%	4%	8%
Will remain unchanged vs. during the COVID-19 crisis	13%	11%	9%	5%	46%
Personal choice, and be open to all patients	13%	12%	14%	11%	13%
NET: Based on Guidance	41%	43%	39%	71%	18%
NET: Personal Choice	29%	29%	34%	14%	20%

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=	1,705	642	726	166	171

What does this mean for the healthcare industry?

Key findings

- A large share of physicians expect **long-lasting negative effects on their practice** – and this expectation is worse than found in mid-May
- The worsening expectations are **shared across specialties and all markets**

Implications for industry

- HCPs across all specialties and markets are working hard to **adapt to drastic and long-lasting changes** to their practice activity
- As healthcare educators and marketers, **we must adapt as well** to ensure we are providing the **right amount and types of support**

Section 2:

Telehealth adoption & challenges

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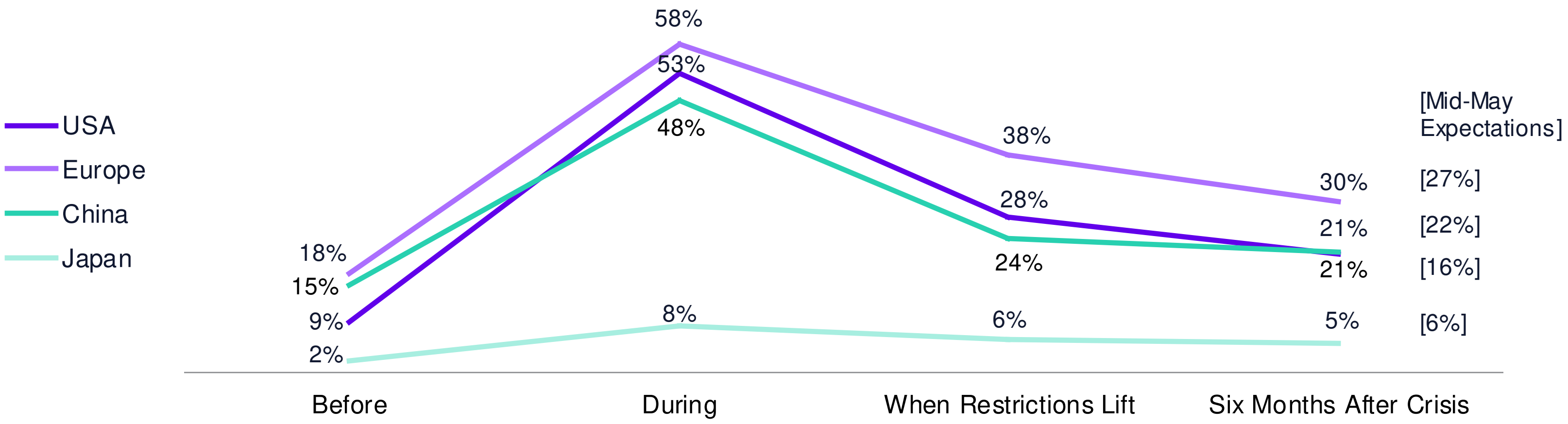
Telehealth has made up most consultations in the US and Europe during the pandemic; Future expectations continue to be twice the level as before the crisis

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

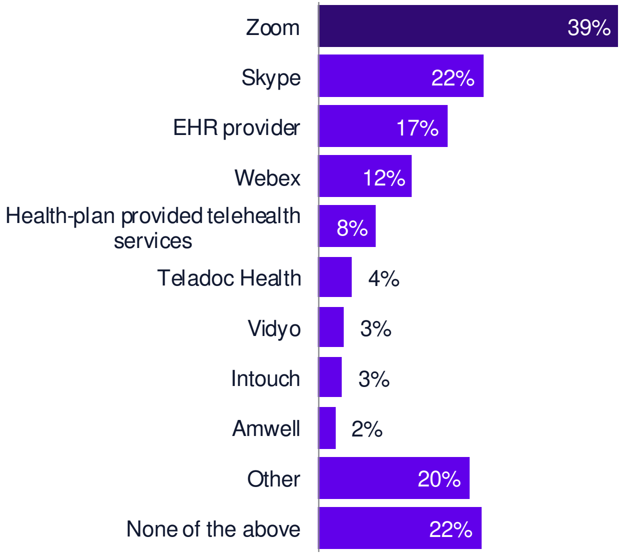


Q3/Q4/Q5How many patient consultations are you doing each week right now/will you be doing when stay-at-home guiadance/restrictions are lifted/six months after the immediate crisis? How many are in-person? How many are remote/tele-health?

	Total	USA	EUR	CHN	JPN
Base Sizes, n=	1,705	642	726	166	171

Zoom is widely used across markets, while Skype and EHR-provided platforms vary – Results are consistent with Mid-May

TELEMEDICINE PLATFORMS CURRENTLY USED



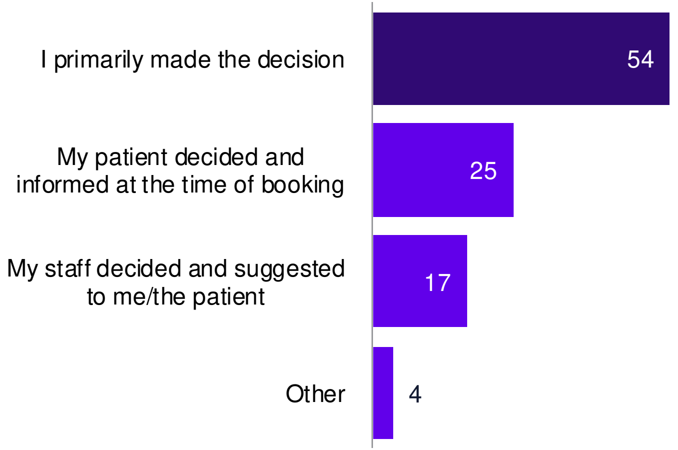
	Total	USA	Europe	China	Japan
Zoom	39%	46%	37%	39%	22%
Skype	22%	14%	31%	23%	12%
EHR provider	17%	34%	2%	36%	1%
Webex	12%	12%	13%	17%	5%
Health-plan provided telehealth services	8%	4%	8%	27%	2%
Teladoc Health	4%	7%	2%	8%	1%
Vidyo	3%	4%	2%	7%	1%
Intouch	3%	3%	3%	9%	1%
Amwell	2%	3%	1%	5%	2%
Other	20%	28%	19%	8%	4%
None of the above	22%	5%	28%	11%	65%

	Total	USA	EUR	CHN	JPN
Base Sizes, n=	1,705	642	726	166	171

Q7. Which of the following telemedicine platforms are you using?

Over half of physicians say they make the decision to have virtual appoints, though physicians in Japan report a larger share (43%) of patients leading the decision

WHO IS MAKING PRIMARY DECISION TO BE VIRTUAL



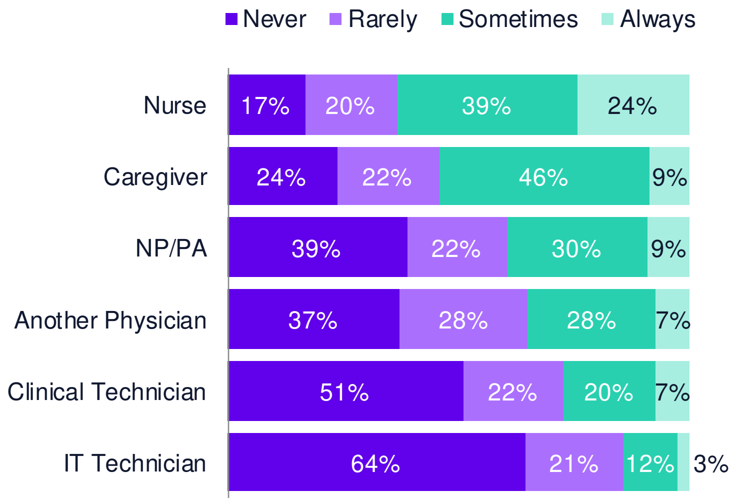
	Total	USA	Europe	China	Japan
I primarily made the decision	54	53	58	49	39
My patient decided and informed at the time of booking	25	29	19	30	43
My staff decided and suggested to me/the patient	17	16	19	18	8
Other	4	2	4	3	10

Q10. Please provide a break-up of appointments conducted virtually (Telemed) in the last 3 months, based on who primary decided that the appointment should be virtual.

	Total	USA	EUR	CHN	JPN
Base Sizes, n=	1,516	589	677	149	101

Nurse and caregivers frequently joined in appointments before the COVID-19 crisis, with some differences in representation by market

WHO PARTICIPATES IN APPOINTMENTS – BEFORE COVID-19



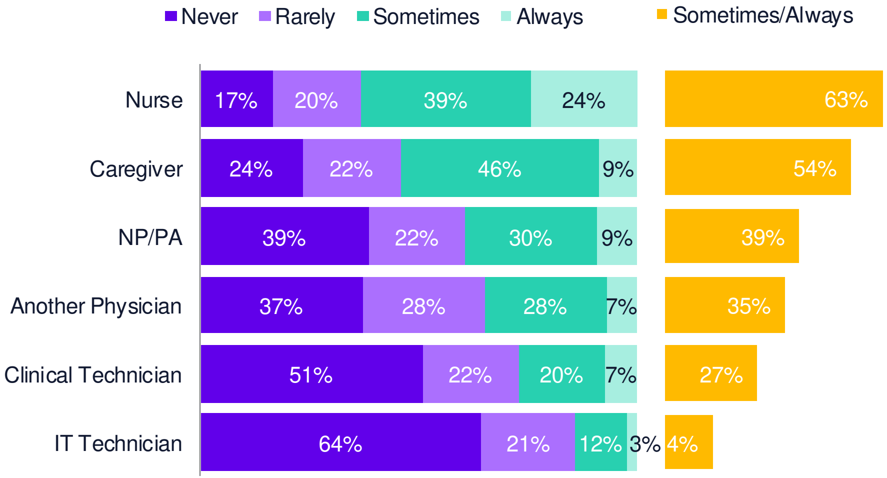
% Sometime/Always	Total	USA	Europe	China	Japan
Nurse	63%	64%	58%	75%	75%
Caregiver	54%	70%	44%	64%	18%
NP/PA	39%	43%	30%	70%	39%
Another Physician	35%	29%	38%	58%	14%
Clinical Technician	27%	31%	23%	43%	9%
IT Technician	14%	10%	17%	23%	6%

Q11. Thinking about in-person appointments in your office or exam room - before the COVID-19 period - how often did the following people participate in the appointment?

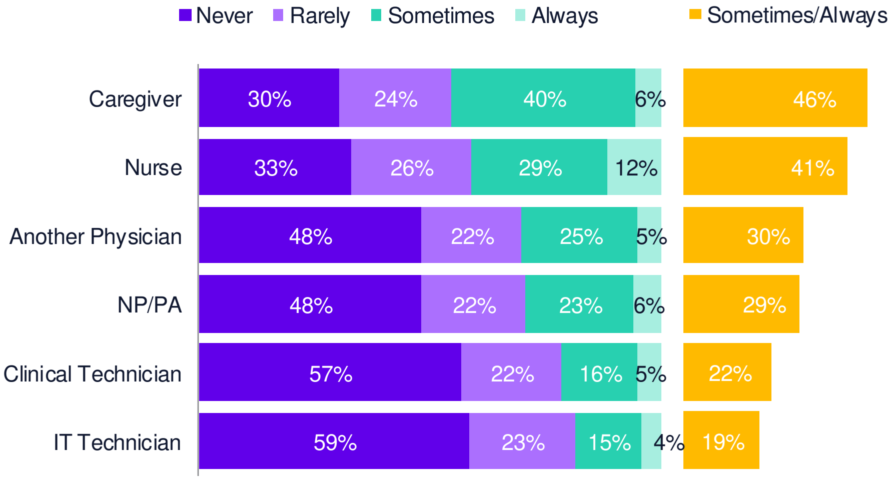
	Total	USA	EUR	CHN	JPN
Base Sizes, n=	1,516	589	677	149	101

Participation has declined among all groups, except IT Technicians

WHO PARTICIPATES IN APPOINTMENTS – BEFORE COVID-19



WHO PARTICIPATES IN APPOINTMENTS – CURRENT

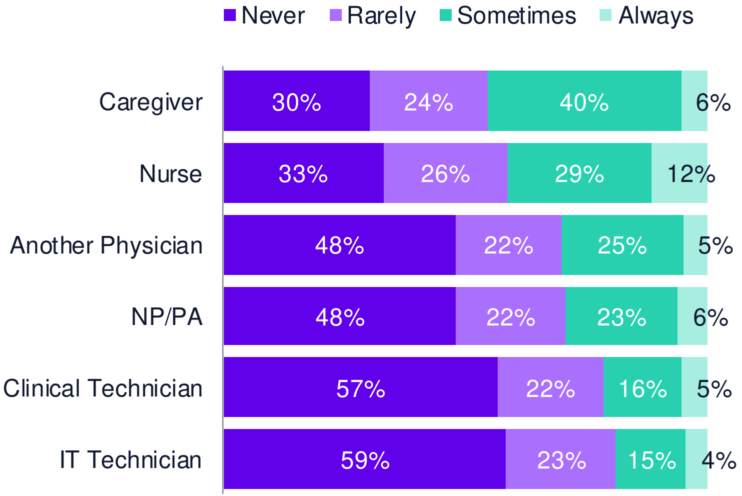


Q12. Now, thinking about virtual appointments conducted via Telemed, how often do the following people participate in the appointment?

	Total	USA	EUR	CHN	JPN
Base Sizes, n=	1,516	589	677	149	101

IT Technician participation increased in all markets, with the largest increase in China; Nurse participation declined by over 20% in all markets

WHO PARTICIPATES IN APPOINTMENTS – CURRENT



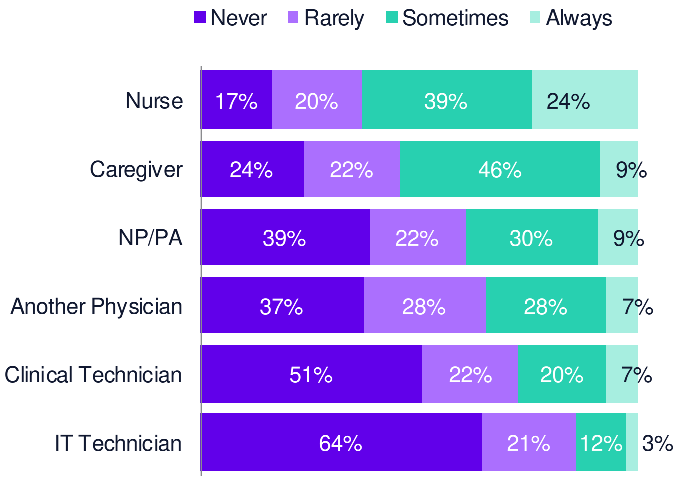
	Total	USA	Europe	China	Japan
Caregiver	46%	60%	38%	46%	14%
Nurse	41%	44%	36%	50%	47%
Another Physician	30%	26%	31%	53%	11%
NP/PA	29%	29%	24%	58%	28%
Clinical Technician	22%	21%	18%	46%	8%
IT Technician	19%	15%	18%	46%	9%

Q12. Now, thinking about virtual appointments conducted via Telemed, how often do the following people participate in the appointment?

	Total	USA	EUR	CHN	JPN
Base Sizes, n=	1,516	589	677	149	101

Prior to COVID-19, some specialties relied more on different participants, such as Hematologists having high participation for nurses, caregivers and NPs/PAs

WHO PARTICIPATES IN APPOINTMENTS – BEFORE COVID-19



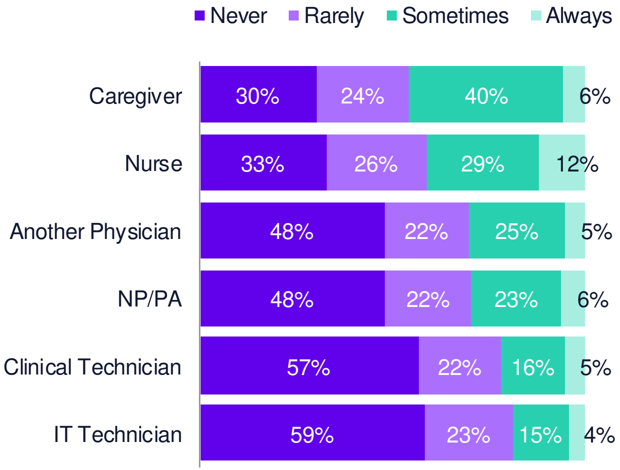
	Total	IM	Card	Derm	Hema	Onc	Endo	Neur	Pulm	Uro	Rheum
Nurse	63%	63%	67%	67%	71%	64%	54%	53%	64%	72%	57%
Caregiver	54%	50%	52%	53%	70%	63%	59%	67%	41%	45%	38%
NP/PA	39%	40%	47%	33%	50%	46%	33%	38%	36%	38%	29%
Another Physician	35%	34%	35%	32%	37%	46%	35%	35%	35%	30%	30%
Clinical Technician	27%	32%	35%	22%	31%	23%	36%	21%	28%	24%	17%
IT Technician	14%	17%	13%	12%	14%	18%	22%	8%	16%	11%	12%

Q11. Thinking about in-person appointments in your office or exam room - before the COVID-19 period - how often did the following people participate in the appointment?

	Total	IM	Card	Derm	Hema	Onc	Endo	Neur	Pulm	Uro	Rheum
Base Sizes, n=	1,516	273	165	154	147	143	112	165	92	133	132

Currently, caregivers are most commonly participating for all specialties except Pulmonology, Urology and Internal Med, who still have nurses as more common

WHO PARTICIPATES IN APPOINTMENTS – CURRENT



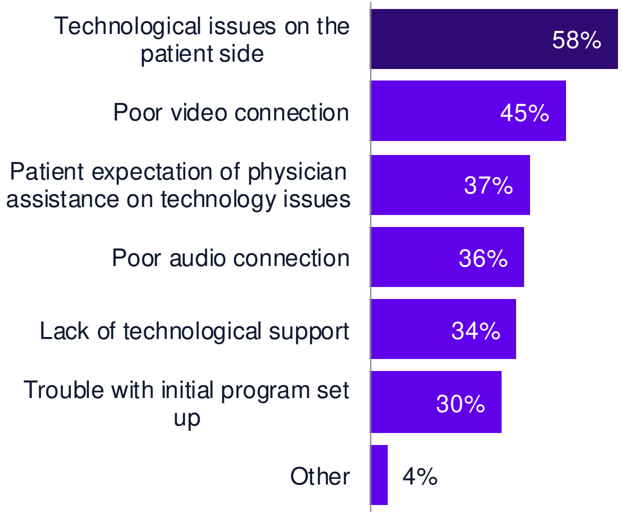
	Total	IM	Card	Derm	Hema	Onc	Endo	Neur	Pulm	Uro	Rheum
Caregiver	46%	46%	43%	40%	53%	57%	50%	58%	41%	29%	34%
Nurse	41%	49%	42%	36%	41%	41%	39%	32%	46%	49%	33%
Another Physician	30%	35%	29%	28%	33%	36%	32%	28%	32%	28%	17%
NP/PA	29%	36%	39%	23%	34%	29%	28%	24%	29%	27%	18%
Clinical Technician	22%	24%	25%	16%	20%	22%	28%	20%	17%	26%	15%
IT Technician	19%	22%	22%	16%	20%	25%	27%	10%	12%	19%	14%

Q12. Now, thinking about virtual appointments conducted via Telemed, how often do the following people participate in the appointment?

	Total	IM	Card	Derm	Hema	Onc	Endo	Neur	Pulm	Uro	Rheum
Base Sizes, n=	1,516	273	165	154	147	143	112	165	92	133	132

The greatest challenge with Telemed technology is issues on the patient side, particularly in the US and China

GREATEST CHALLENGES WITH TECHNOLOGY



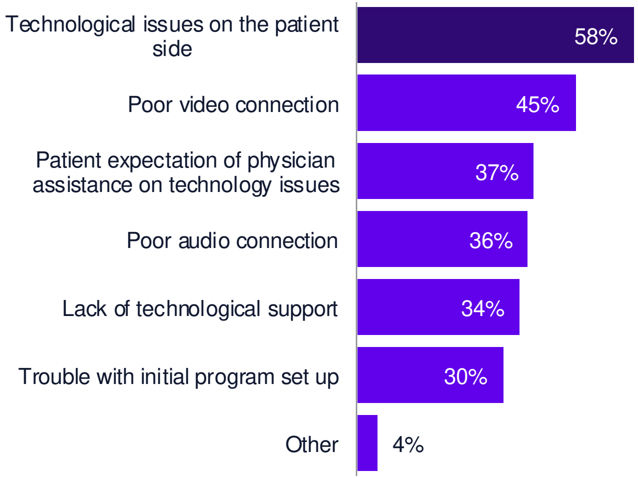
	Total	USA	Europe	China	Japan
Technological issues on the patient side	58%	71%	46%	69%	40%
Poor video connection	45%	54%	39%	52%	29%
Patient expectation of physician assistance on technology issues	37%	39%	33%	58%	23%
Poor audio connection	36%	39%	34%	40%	28%
Lack of technological support	34%	30%	36%	44%	32%
Trouble with initial program set up	30%	34%	26%	48%	14%
Other	4%	3%	5%	1%	10%

Q13. What have been the greatest technological challenges using telehealth (Check all that apply)?

	Total	USA	EUR	CHN	JPN
Base Sizes, n=	1,516	589	677	149	101

One specialty with unique challenges is Dermatology, which notes poor video connection as the greatest challenge with Telemed

GREATEST CHALLENGES WITH TECHNOLOGY



	Total	IM	Card	Derm	Hema	Onc	Endo	Neur	Pulm	Uro	Rheum
Technological issues on the patient side	58%	58%	60%	60%	54%	52%	63%	60%	48%	56%	63%
Poor video connection	45%	47%	41%	63%	40%	41%	33%	53%	48%	38%	47%
Patient expectation of physician assistance on technology issues	37%	41%	38%	46%	37%	39%	37%	30%	34%	38%	27%
Poor audio connection	36%	37%	34%	37%	36%	29%	45%	39%	38%	32%	32%
Lack of technological support	34%	32%	32%	35%	37%	35%	42%	32%	29%	33%	36%
Trouble with initial program set up	30%	32%	24%	32%	36%	36%	31%	25%	34%	30%	24%
Other	4%	5%	4%	1%	4%	1%	4%	6%	4%	5%	7%

Q13. What have been the greatest technological challenges using telehealth (Check all that apply)?

	Total	IM	Card	Derm	Hema	Onc	Endo	Neur	Pulm	Uro	Rheum
Base Sizes, n=	1,516	273	165	154	147	143	112	165	92	133	132

What does this mean for the healthcare industry?

Key findings

- Physicians foresee **Telehealth to continue** as a substantial portion of their patient engagement (except in Japan)
  - After the pandemic passes, physicians expect Telehealth to make up **twice the amount of patient interactions as before the pandemic**
- One aspect of virtual patient meetings that has changed is the **decline in nurses** participating in Telehealth appointments
- The greatest challenge with Telemed technology is **issues on the patient side – poor video connection** is especially problematic in Dermatology

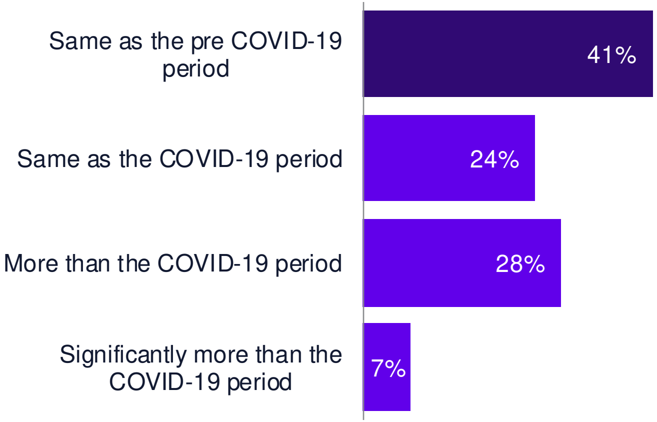
Implications for industry

- Physicians have rapidly adopted new technologies to combat office closures/ declines in patient foot traffic – showing **promise for future digital transformations in other aspects of their profession**
- The **"point of prescription" is becoming more digital** – and so should the ways we **educate on treatment options**
- **Invest in research** to further understand your key market and build a customized, personalized digital approach

Section 3:
The future of pharma engagement

Physicians vary in expectations for how the number of future conversations with sales reps will change

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



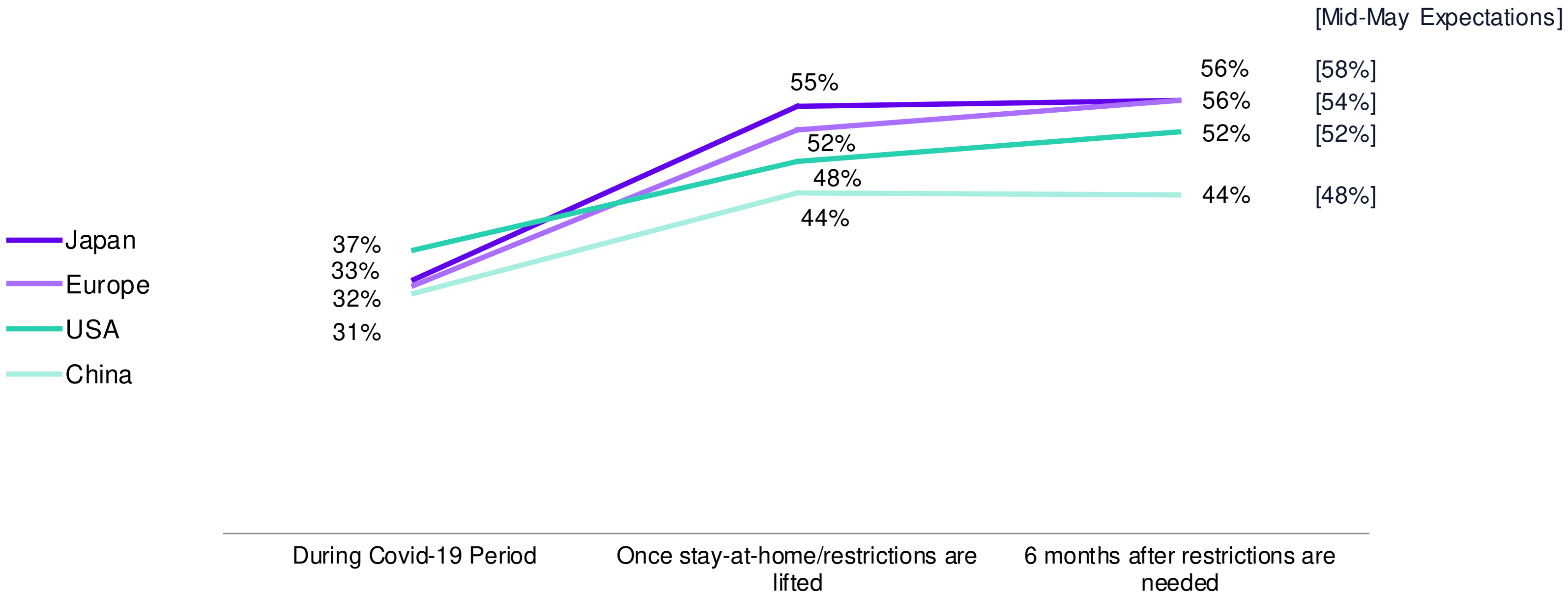
	Total	USA	Europe	China	Japan
Same as the pre COVID-19 period	41%	44%	38%	34%	48%
Same as the COVID-19 period	24%	27%	23%	23%	21%
More than the COVID-19 period	28%	25%	30%	35%	24%
Significantly more than the COVID-19 period	7%	4%	8%	7%	7%

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	USA	EUR	CHN	JPN
Base Sizes, n=	1,705	642	726	166	171

Similar to mid-May, half of conversations with sales reps are expected 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

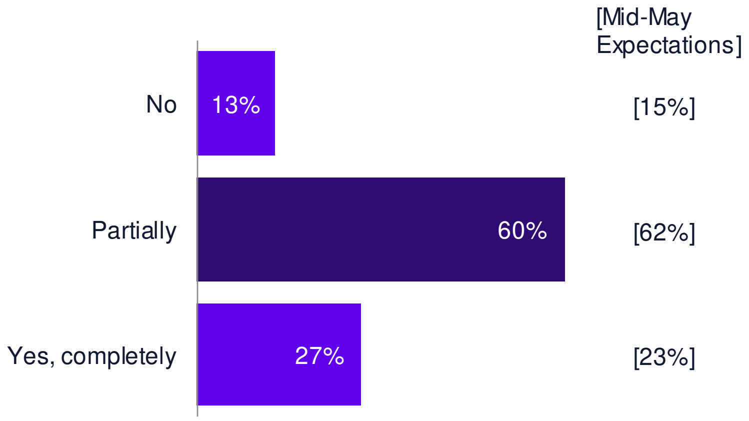


Q34. Thinking about the time during the Covid-19 period... What share of your conversations are/were in-office?

	Total	USA	EUR	CHN	JPN
Base Sizes, n=	1,705	642	726	166	171

Most physicians (60%) 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



	Total	USA	Europe	China	Japan
No	13%	16%	10%	15%	10%
Partially	60%	57%	63%	64%	55%
Yes, completely	27%	26%	27%	20%	35%

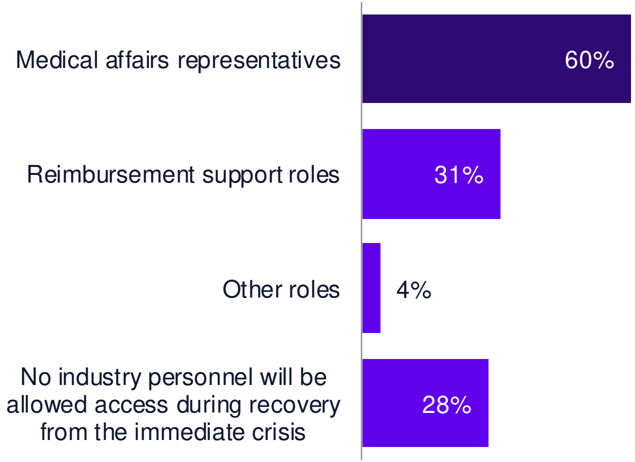
Note: no notable differences found among specialties

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=	1,705	642	726	166	171

Medical affairs representative will be welcomed for in-office meetings for over half of physicians in all markets, with higher levels in Japan and Asia

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



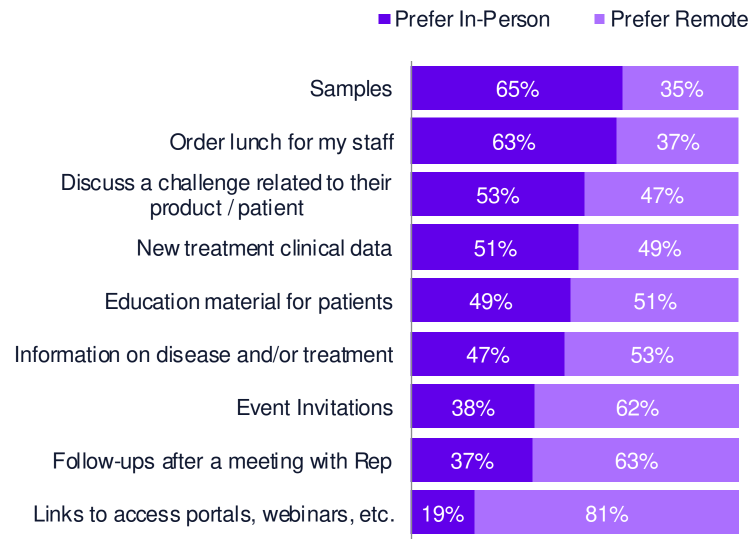
	Total	USA	Europe	China	Japan
Medical affairs representatives	60%	52%	59%	84%	77%
Reimbursement support roles	31%	38%	27%	42%	15%
Other roles	4%	2%	7%	1%	4%
No industry personnel will be allowed access during recovery from the immediate crisis	28%	37%	26%	14%	20%

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=	217	103	72	25	17

Physicians note different preferences for type of interaction for pharma purpose – and physicians in US prefer less in-person interactions

PREFERENCE FOR IN-PERSON OR REMOTE FOR INTERACTIONS



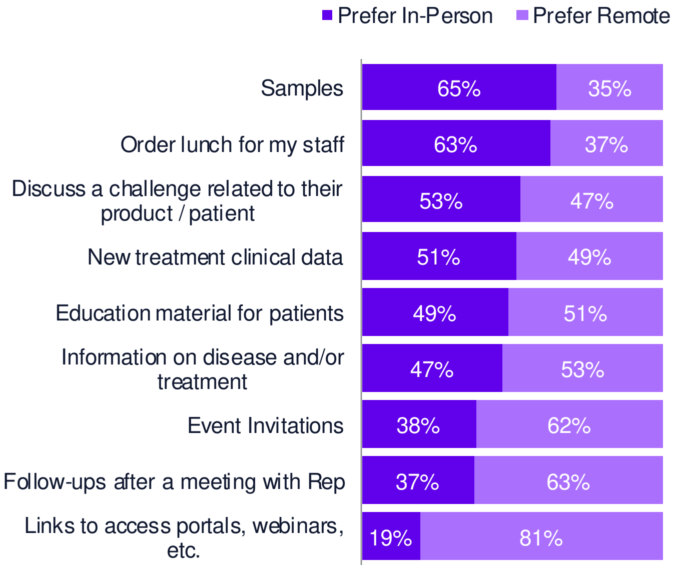
% Preferred In-Person	Total	USA	Europe	China	Japan
Samples	65%	66%	63%	64%	69%
Order lunch for my staff	63%	67%	65%	39%	54%
Discuss a challenge related to their product / patient	53%	46%	57%	54%	62%
New treatment clinical data	51%	45%	57%	46%	54%
Education material for patients	49%	46%	52%	40%	54%
Information on disease and/or treatment	47%	40%	54%	46%	43%
Event Invitations	38%	32%	45%	31%	32%
Follow-ups after a meeting with Rep	37%	29%	41%	48%	41%
Links to access portals, webinars, etc.	19%	18%	21%	20%	15%

Q43. Thinking about interactions with sales reps which ones you'd rather have in-person vs. remote if either option were available? (Don't Use excluded)

	Total	USA	EUR	CHN	JPN
Base Sizes, n=	1,705	642	726	166	171

For receiving samples, Dermatologists and Urologists most strongly prefer in-person interactions

PREFERENCE FOR IN-PERSON OR REMOTE FOR INTERACTIONS



% Preferred In-Person	Total	IM	Card	Derm	Hema	Onc	Endo	Neur	Pulm	Uro	Rheum
Samples	65%	64%	62%	70%	61%	60%	69%	65%	58%	70%	66%
Order lunch for my staff	63%	62%	60%	67%	58%	64%	60%	61%	57%	71%	65%
Discuss a challenge related to their product / patient	53%	49%	52%	51%	44%	47%	62%	54%	59%	65%	56%
New treatment clinical data	51%	47%	55%	51%	51%	49%	57%	47%	56%	52%	56%
Education material for patients	49%	48%	54%	54%	38%	41%	57%	46%	44%	53%	53%
Information on disease and/or treatment	47%	45%	52%	44%	43%	44%	43%	43%	45%	59%	51%
Event Invitations	38%	40%	42%	38%	28%	31%	40%	39%	44%	45%	34%
Follow-ups after a meeting with Rep	37%	40%	45%	30%	26%	32%	47%	37%	39%	40%	39%
Links to access portals, webinars, etc.	19%	20%	19%	20%	16%	23%	19%	15%	19%	23%	18%

Q43. Thinking about interactions with sales reps which ones you'd rather have in-person vs. remote if either option were available? (Don't Use excluded)

	Total	IM	Card	Derm	Hema	Onc	Endo	Neur	Pulm	Uro	Rheum
Base Sizes, n=	1,705	310	185	174	168	167	127	182	103	149	140

What does this mean for the healthcare industry?

Key findings

- The future for physician engagement by pharma companies will **lean on more remote activities**
- It's noteworthy that **physician in the US express less preference for in-person meetings**, even for education, sharing new information, and discussing challenges related to a product or patient

Implications for industry

- When building your engagement strategy, the **mix of in-person and remote** activities will need to account for office rules, changing physician preferences, and the purpose of the activity
- As always, **specialty and market-specific nuances are key** to informing your marketing strategy – we always recommend conducting your own research to dive in deeper!

Thank you!

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