



Adapting to COVID-19

*Voice of the patient and provider, and
implications for pharma*

April 1, 2020



Impact where it matters.

Contact us

Further questions? Please contact any of the following ZS team members:

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Over 100 doctors, 200 patients and 30 administrators participated in our effort to understand the implications of COVID through an online survey

Study and Respondent Information

FIELDING DATES
Mar 20 – Mar 27, 2020



RESPONDENTS
102 MDs
202 Patients
30 Administrators



MODE OF DATA COLLECTION
Online Quantitative Survey



SURVEY DURATION
10 Minutes



We also supplemented survey findings through 10 in-depth conversations with specialists

Specialties surveyed: Primary care, endocrinology, rheumatology, oncology, neurology, cardiology, pulmonology, infectious disease
See Appendix for full sample details

Contents

- **Pharma's New Path Forward**

- Detailed Perspectives

- COVID Concerns and Challenges
- Impact on Treatment
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COVID-19 will bring unprecedented burden

Patients – fearful of the virus and uncertain of what to do – **are not seeing their doctors.**

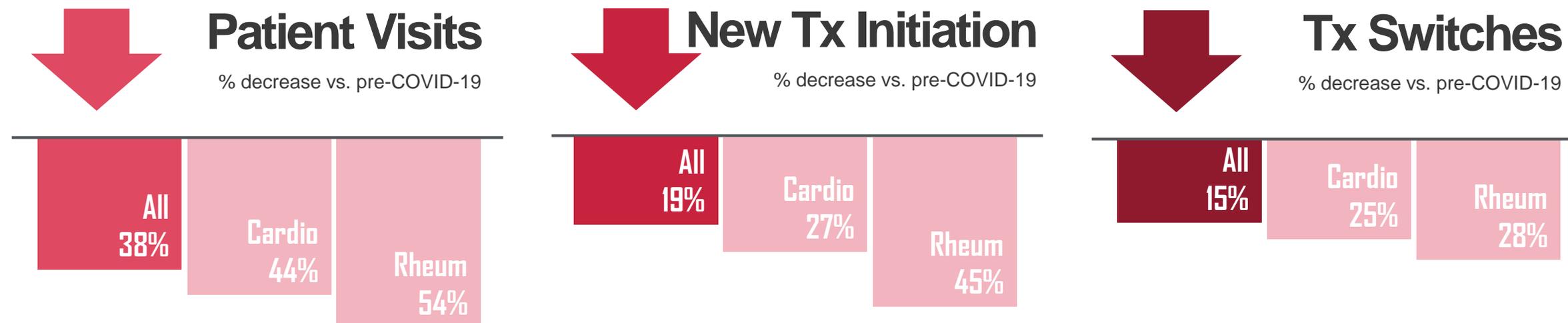
Providers – overwhelmed and under-resourced – **are changing their treatment approach.**

Interventions – like telehealth, counseling and alternate sites of care – **are helping but only for those who can access them.**



Pharma can rise to the occasion and prepare for a new reality

Near-term impact of COVID-19 on drug demand will be substantial



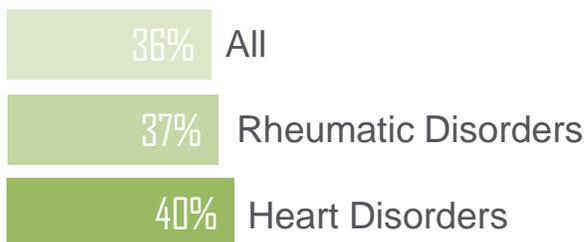
10 - 30%
Drop in Q2 Demand

Continuity of care faces three critical barriers in the near term

Structural

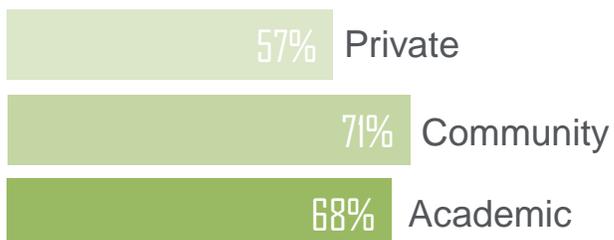
Patients are staying home

% social distancing



Appointments are postponed

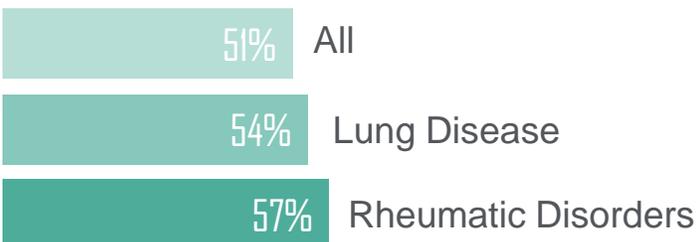
% of practices postponing non-essentials appointments



Psychological

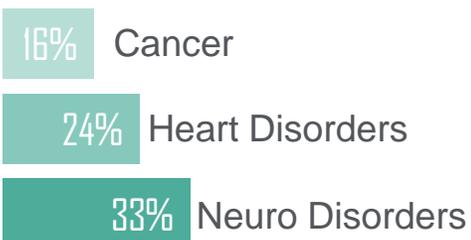
Patients fear exposure

% stating the contraction of COVID-19 as top 2 concerns



Increased COVID risk from Rx

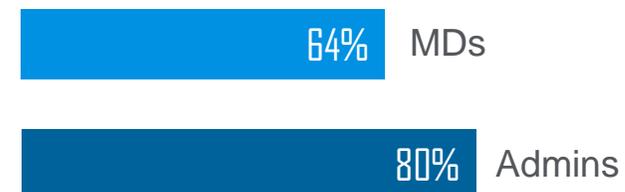
% concerned about contracting COVID-19 due to medication



Functional

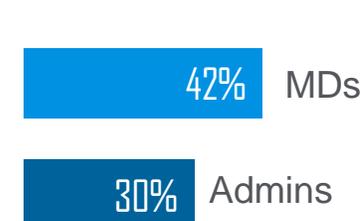
Supplies are scarce

% ranking lack of medical supplies as top 2 challenges



Staffing is limited

% ranking lack of staffing as top 2 challenges



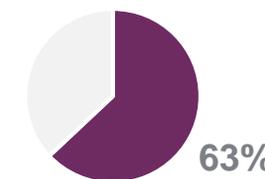
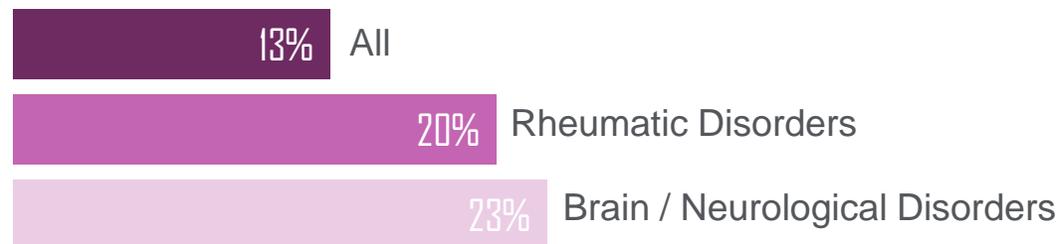
Alternate ways of seeking and providing care are gaining traction

% patients stating very positive experience



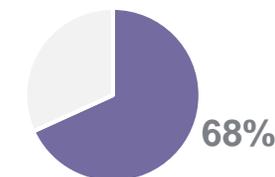
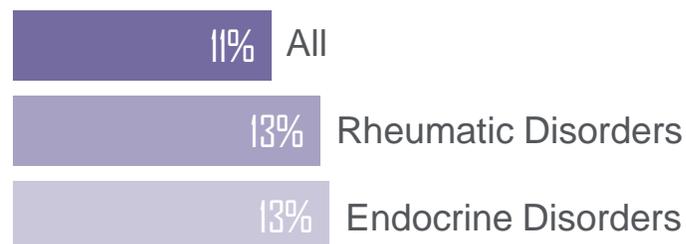
Telehealth

% of patients that have used telehealth or digital health resources



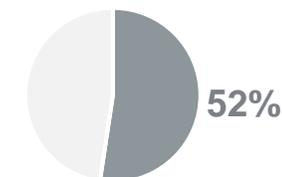
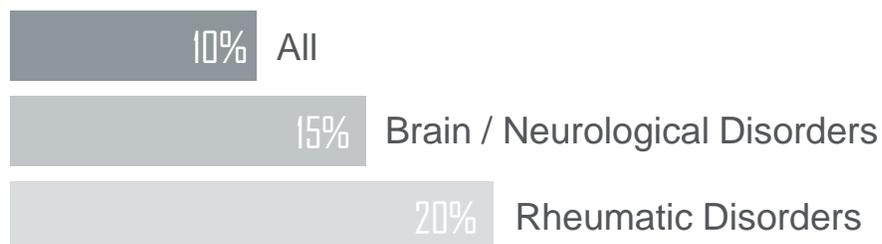
Counseling

% that have received mental health or counseling resources



Home health

% that have received in-home care



Providers and patients see a critical role for pharma in addressing these barriers

Structural

Telehealth access

% ranking telehealth as one of their top 2 most helpful support mechanisms

69% MDs (#1 choice)

43% Admins (#1 choice)

Alternate Site triaging

% ranking access to alternate sites of care as one of their top 2 most helpful support mechanisms

22% MDs

40% Admins

Psychological

Educational resources

% of administrators ranking material on COVID-19's impact on other conditions as their top pharma support option

23% All

29% Facility Management

33% Quality and Patient Safety

Nurse support

% preferring in-person or virtual support from nurse educators vs. sales reps

Nurse educators 72% MDs

Sales Rep 55% MDs

Nurse educators 90% Admins

Sales Rep 70% Admins

Functional

Logistics support

% ranking mail order / delivery of medicines as their top pharma support option

22% Patients (#1 choice)

18% MDs

13% Admins

Financial support

% ranking copay and other financial support as their top pharma support option

17% All

20% Heart Disorders

20% Neuro Disorders

Pharma can rise to the occasion in the near-term through concerted intervention

Where can pharma intervene?



Improve Access to Healthcare Delivery

Develop Treatment Guidelines for COVID-19 Interactions

Provide Critical Patient Support Services

How can they make this happen?



Develop New Roles for Field Force

Repurpose Patient Engagement Channels for Education and Triaging

Deploy Digital Rapidly

What will help make this happen?



Motivate Employees towards a Broader Purpose

Bring an Industry Coalition

Obtain Necessary Regulatory Guidance

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The physician sentiment

*My biggest concern is the health and safety of **my patients, my staff, myself, my family**, and everyone else. These are not mutually exclusive; they're **part of the same continuum**.*

*In the last two weeks, we have all been concerned about exposure to any potential patient who comes in with suspected travel history or contact or symptoms. We have **elderly** patients. We have patients on **biologics**. The last two weeks were very difficult. We **switched to telehealth**. Our office is open only for **infusions and injections**.*

-Rheumatologist



Beyond the risk of contracting COVID-19, patients are most concerned about the increased risk from their ongoing medication

Patient Concerns



Patient concerns heard by MDs

% of MDs stating each patient concern, n=102

1.	Fear of contracting & spreading COVID-19	84%
2.	Ability to receive in-person care	74%
3.	COVID-19's interaction with pre-existing conditions	69%
4.	Ability to receive medicine	56%
5.	Cost of care	20%



Patient concerns stated by patients

% of patients stating top 2 concerns, n=202

Concerned about contracting COVID-19	51%
Concerns around increasing the chances of contracting COVID-19 due to current med.	35%
Risks associated with visiting doctor in-person	20%
Concerned about spreading COVID-19	20%
Concerned about medical supply shortage	14%

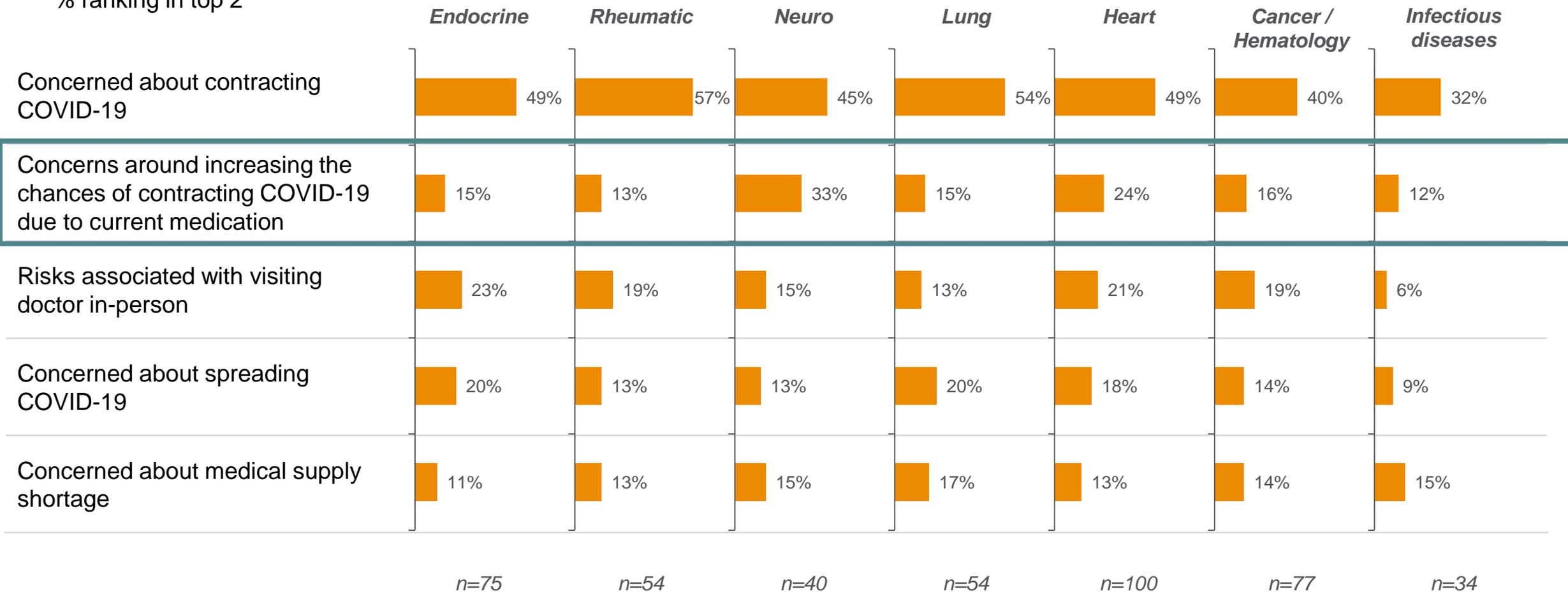
Pharma has a big role to play in addressing patient concerns on the connection between their medications and COVID risk

Q: Which of the following concerns are you commonly hearing from your patients as it relates to COVID-19? Q: Which of the following concerns are most important to you at this time? Please select your top two choices.

This risk is most acutely felt by patients with heart and neurological disorders

Patient Concerns

% ranking in top 2



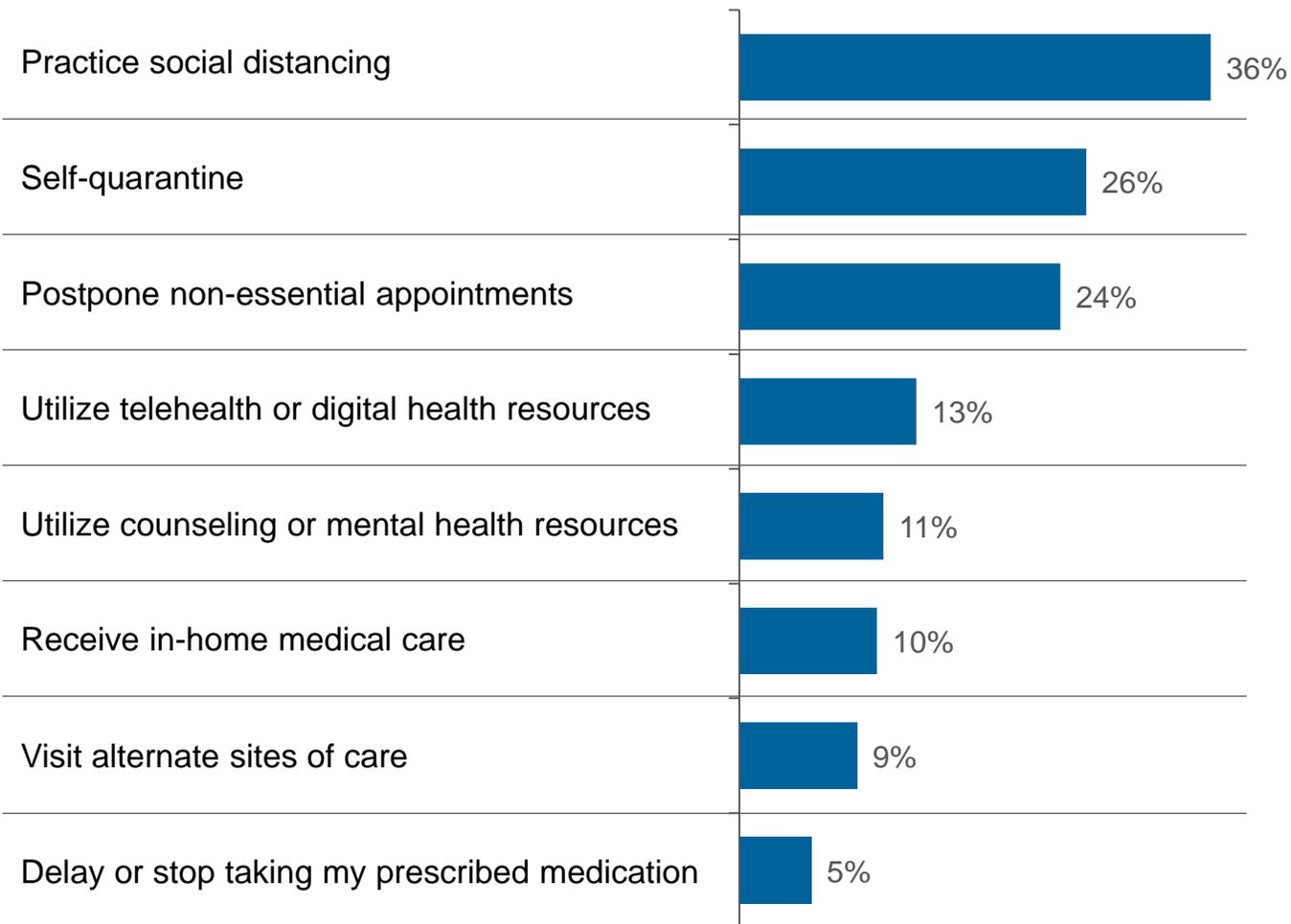
Q: Which of the following concerns are you commonly hearing from your patients as it relates to COVID-19? Q: Which of the following concerns are most important to you at this time? Please select your top two choices.

While adapting to COVID-19, patients are warming up to new ways of seeking care, including telehealth, at-home support and alternate sites of care

Patient actions in response to COVID-19

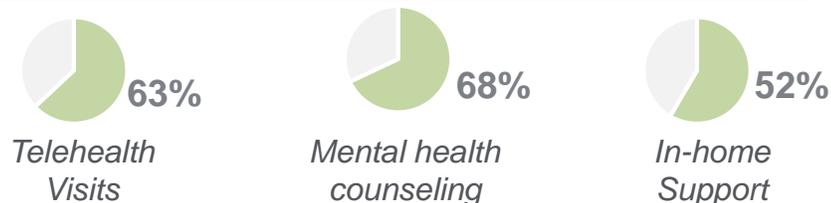
n=202

% Patients Taking Action



Actions in compliance with government guidelines to control COVID-19 outbreak

Interventions that are gaining traction and might become the new normal



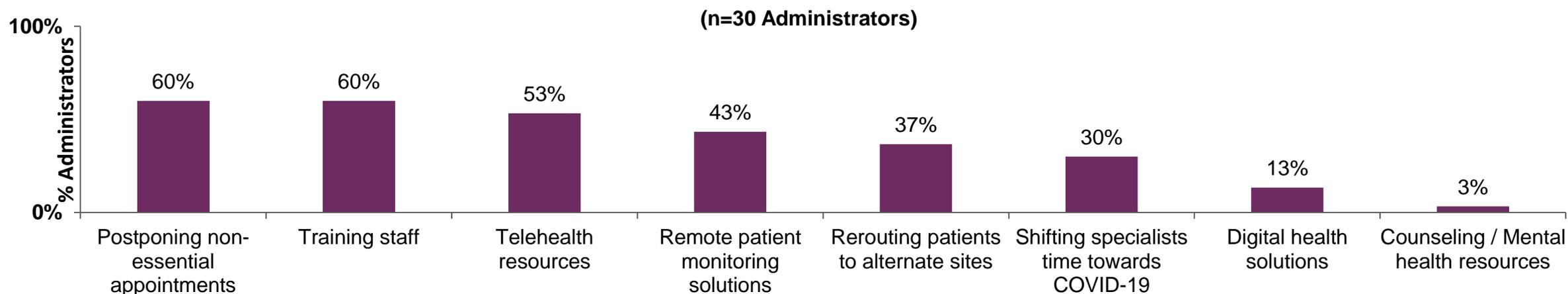
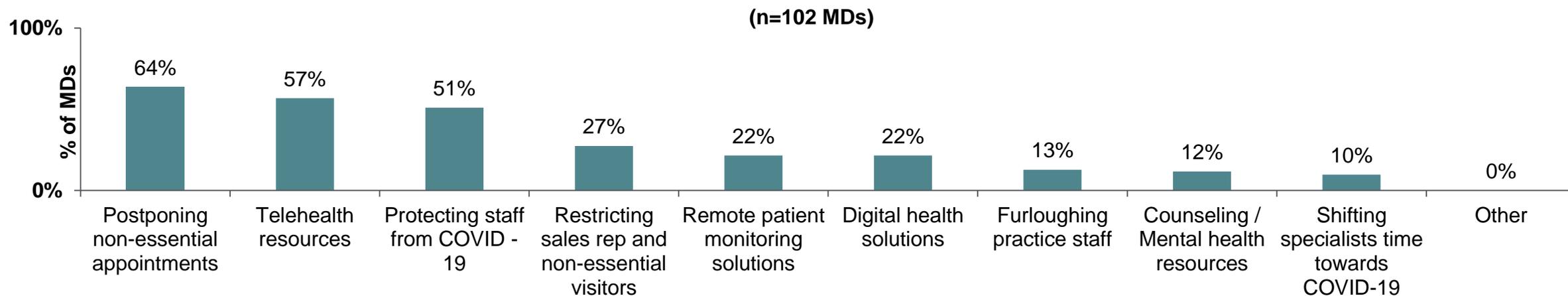
% Patients stating positive experience

Q: On a scale of 1-7, how likely are you to take the following actions in response to COVID-19?

Providers are also responding to the COVID-19 crisis through prioritization of essential patient visits and deploying telehealth resources

Most impactful responses to COVID-19

% selecting top 3 actions taken



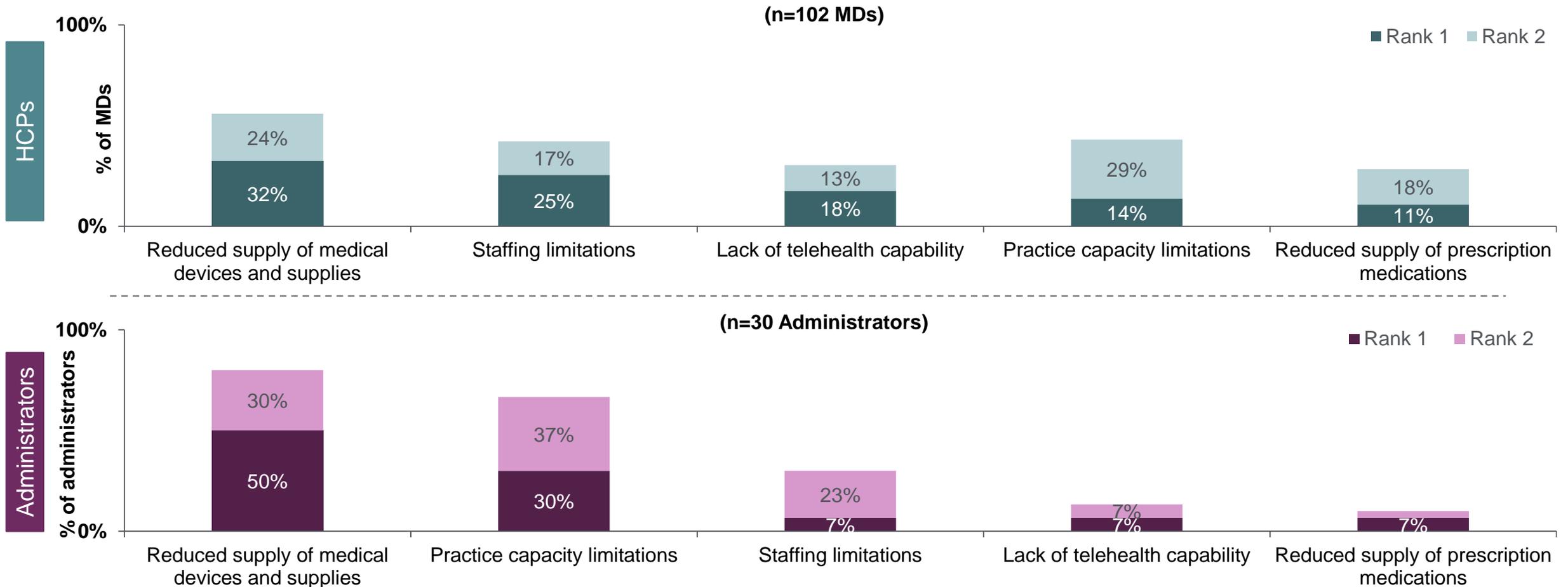
Q: Please select the top three most impactful responses your practice is taking in light of the COVID-19 situation

Q: Please select the top three most important responses to prepare your institution to continue treating patients (COVID-19 and non-COVID-19 patients) during the COVID-19 situation

However, providers are bracing for significant resource gaps; in particular, shortages of critical supplies and devices

Biggest challenges in light of COVID-19

% ranking in top 2



Q: Thinking about your practice/institution, please rank potential challenges associated with COVID-19 in terms of how they might impede your practice's/institution's ability to provide care. Please rank from most to least impactful

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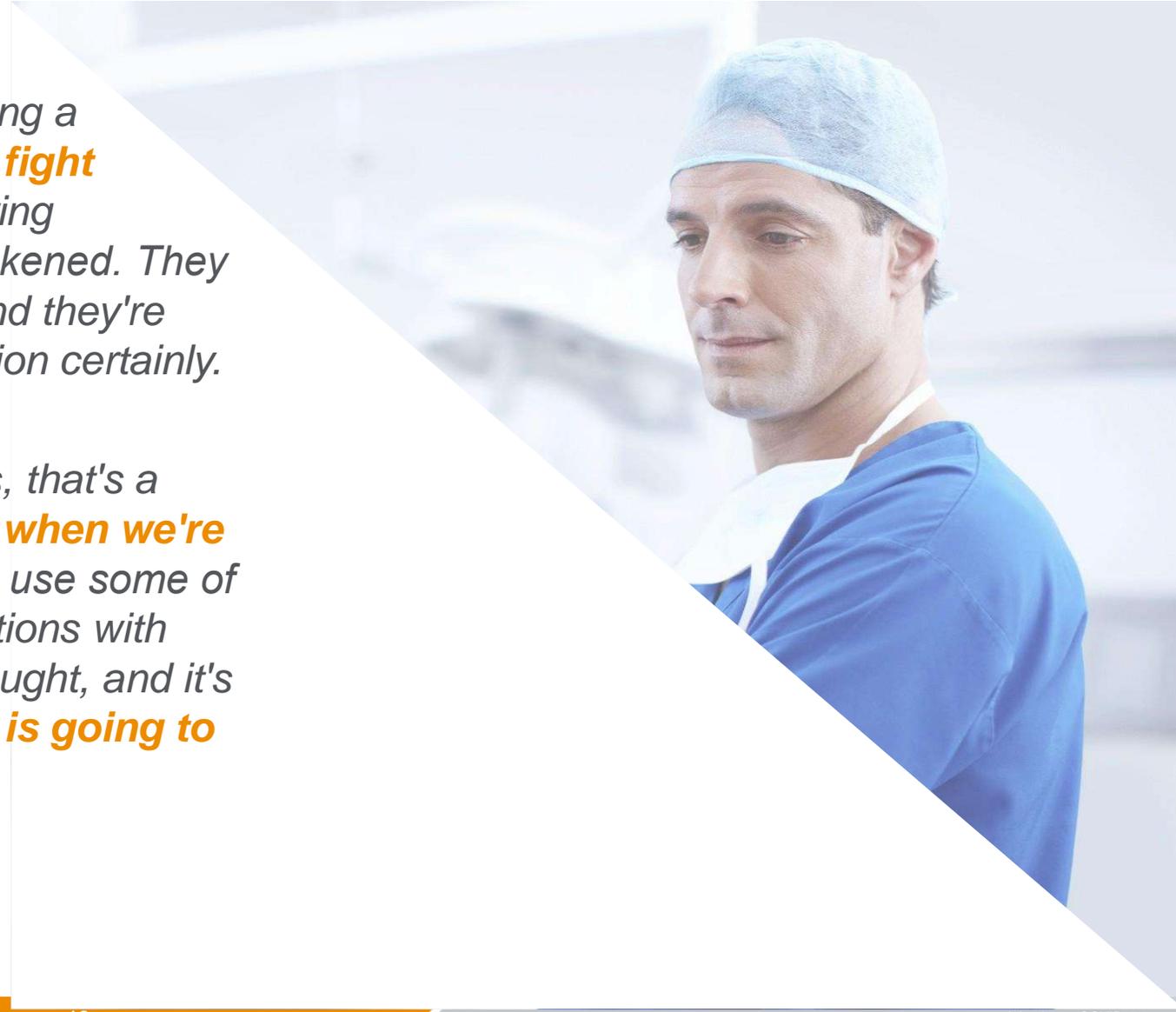
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- **Detailed Findings**
 - COVID Concerns and Challenges
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COVID-19 will alter every stage of the treatment selection and management process

“...I'm going to be **more concerned** about selecting a medication that could reduce a patient's **ability to fight infection**, or that would increase the risk of acquiring infection...many [severe] patients are already weakened. They already may be wheelchair bound, for instance, and they're going to be at more risk for complications of infection certainly.

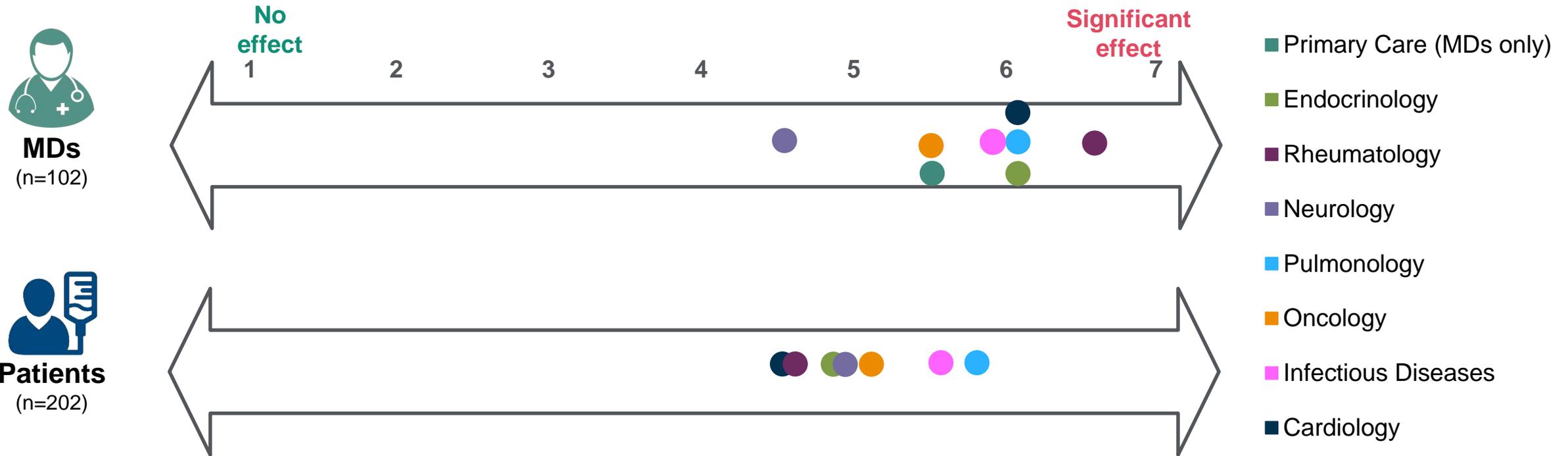
For patients that **already are on those** treatments, that's a somewhat different matter. We can maybe **adjust when we're giving the treatments**... So I'm probably going to use some of our higher power but more dangerous MS medications with **more circumspection**. It's going to take more thought, and it's likely to be the case that my **use of those agents is going to be reduced** somewhat.

-Neurologist



Across the board, physicians anticipate a significant impact to the treatment and management of patients with specialty conditions

COVID-19's impact on treatment / management of non-COVID-19 conditions



With more information and a presence on the frontlines, MDs currently foresee a higher impact than patients. This could change as DTC campaigns and other media boost patient awareness.

Q: On a scale of 1-7, to what extent do you anticipate the overall treatment approach for the specialty conditions you treat to be affected by the COVID-19 situation?

Q: On a scale of 1-7, what impact do you anticipate COVID-19 will have on your ability to treat and/or manage your conditions?

The administrator view is equally bleak, with many acutely concerned with the impact of supply shortages

COVID-19's impact on treatment / management of non-COVID-19 conditions



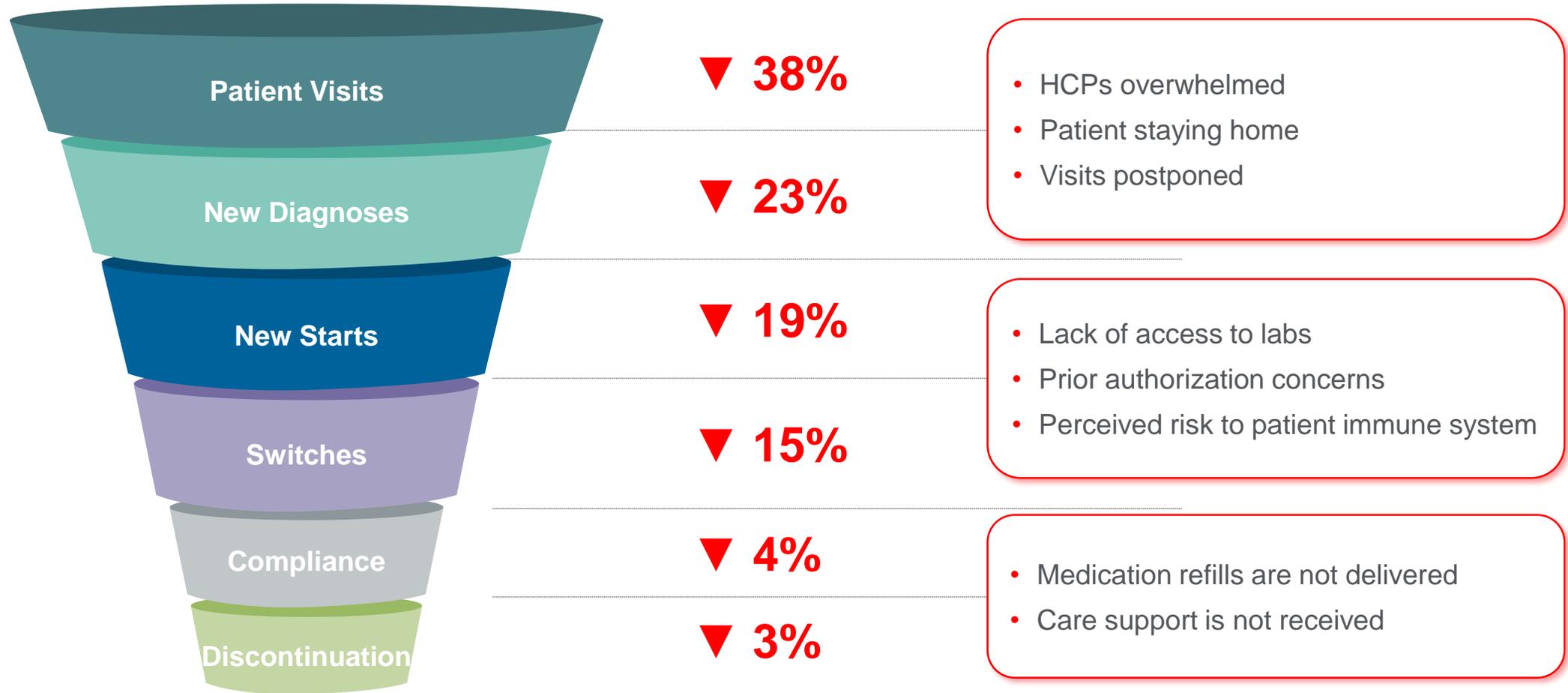
Pharmacists and **supply chain managers** anticipate the highest impact, likely due to their ground-level knowledge of supply and medical shortages

Certain field roles may be able to act as a liaison between struggling institutions and suppliers, playing a critical role in ensuring supply meets demand

Q: On a scale of 1-7, to what extent do you anticipate the overall treatment approach for the specialty conditions your institution treat to be affected by the COVID-19 situation?

This impact will be felt throughout the treatment journey

Stage of treatment journey & anticipated change (vs. pre-COVID-19)

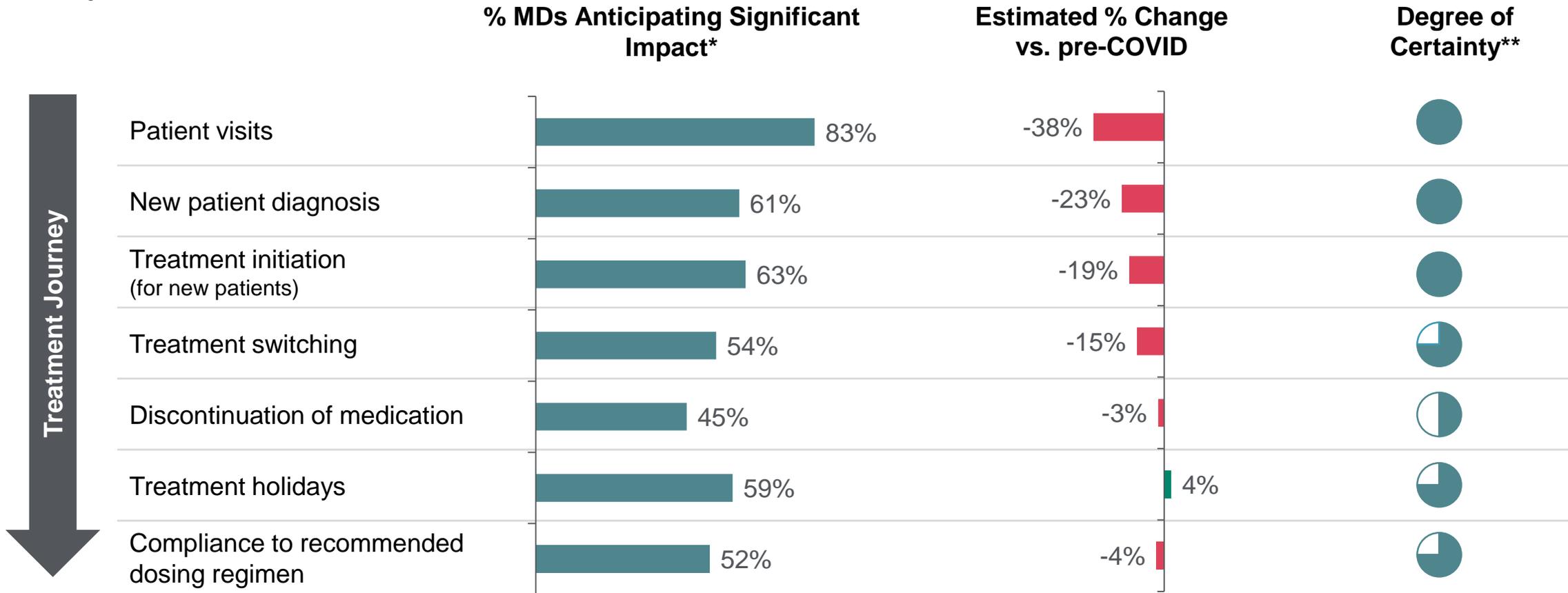


Q: Please review the estimated effect question for each area and then decide if you foresee an increase or decrease and estimate a percent change.

Physicians indicate the most impact on diagnosis and drug initiation

COVID-19's impact on treatment journey stages

n=102



*% of MDs rating 5-7 on a scale of 1-7, **Degree of Certainty calculated using the relative proportion of MDs anticipating increase vs decrease for that stage

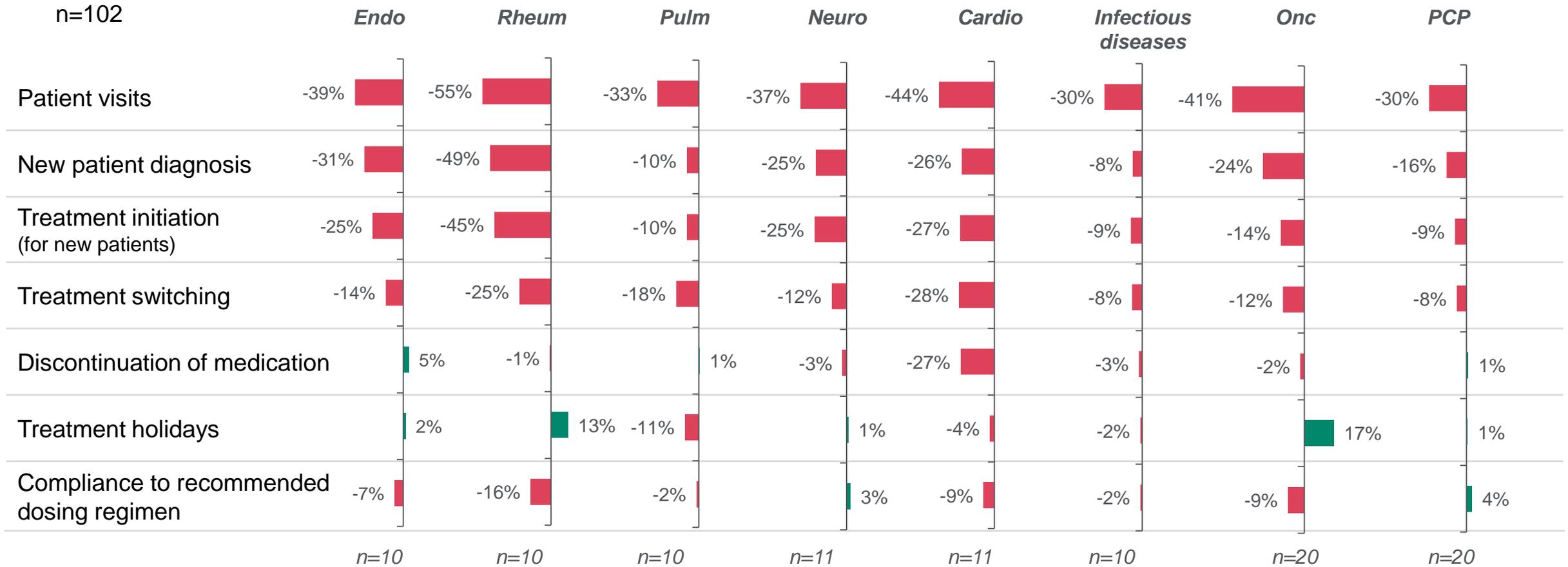
Q: On a scale of 1-7, with 1 being no effect and 7 being very significant effect, to what extent do you anticipate each of the following areas of your patient's treatment process to be affected by the COVID-19 situation?

Q: Please review the estimated effect question for each area and then decide if you foresee an increase or decrease and estimate a percent change.

Rheumatologists and endocrinologists expect the highest percentage drop in the diagnosis and treatment initiation stages

COVID-19's impact on treatment journey stages

n=102

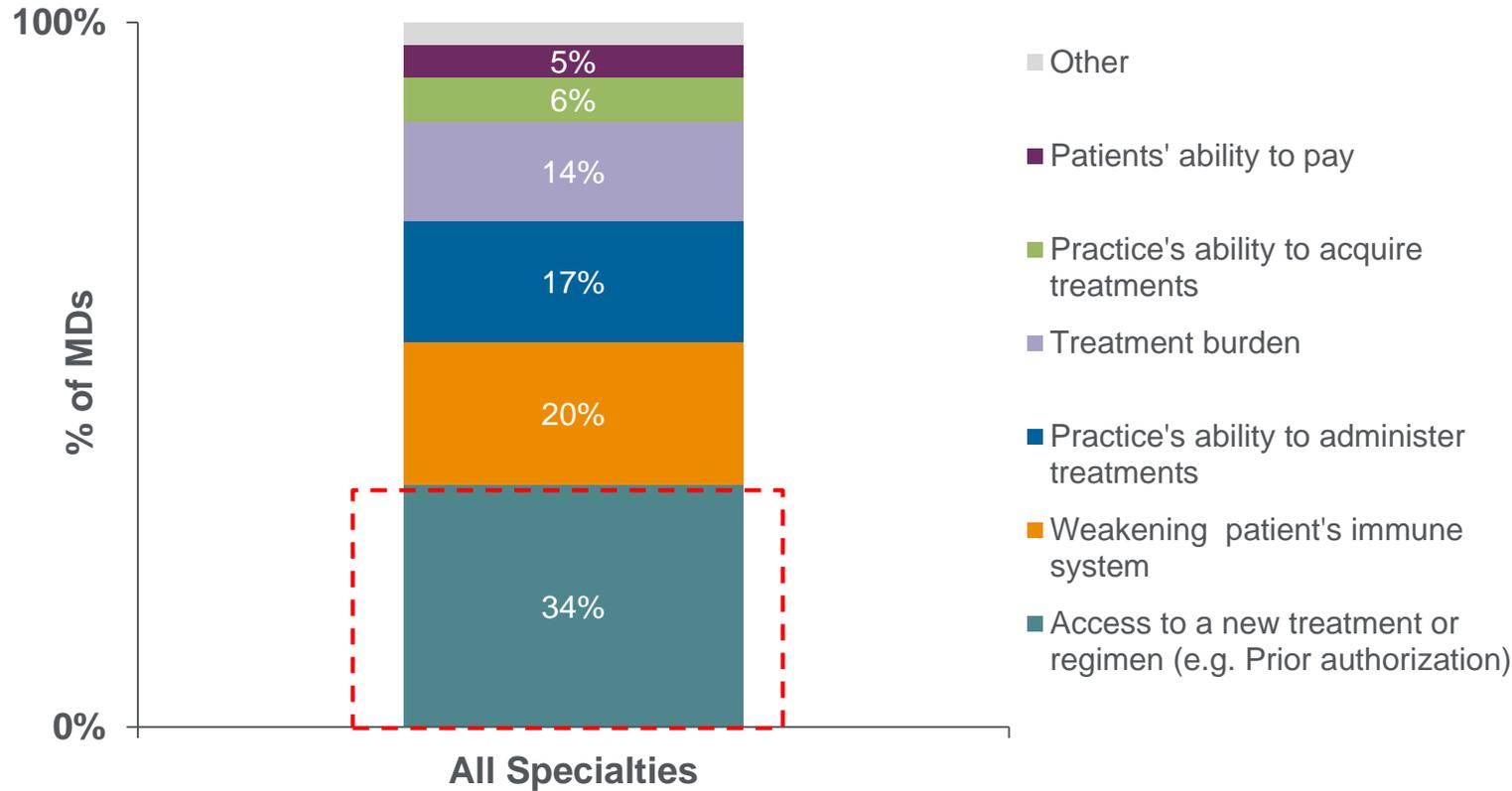


Q: Please review the estimated effect question for each area and then decide if you foresee an increase or decrease and estimate a percent change.

Treatment initiation and switches are impeded by lack of access to labs, prior authorization concerns and perceived risk to the patient immune system

Reasons for delayed starts or non-starts

n=64



Other Considerations

- Biologics such as **immunosuppressants, insulin and injectables** cited as the most impacted drug classes
- **Oncologists** are especially worried about weakening patients' immune system
- Treatment burden is a heightened concern for **Endocrinologists (e.g., unproven risk of ACE inhibitors)**

Now, more than ever, Pharma can play a role in smoothing bottlenecks in the prior authorization and benefits investigation processes

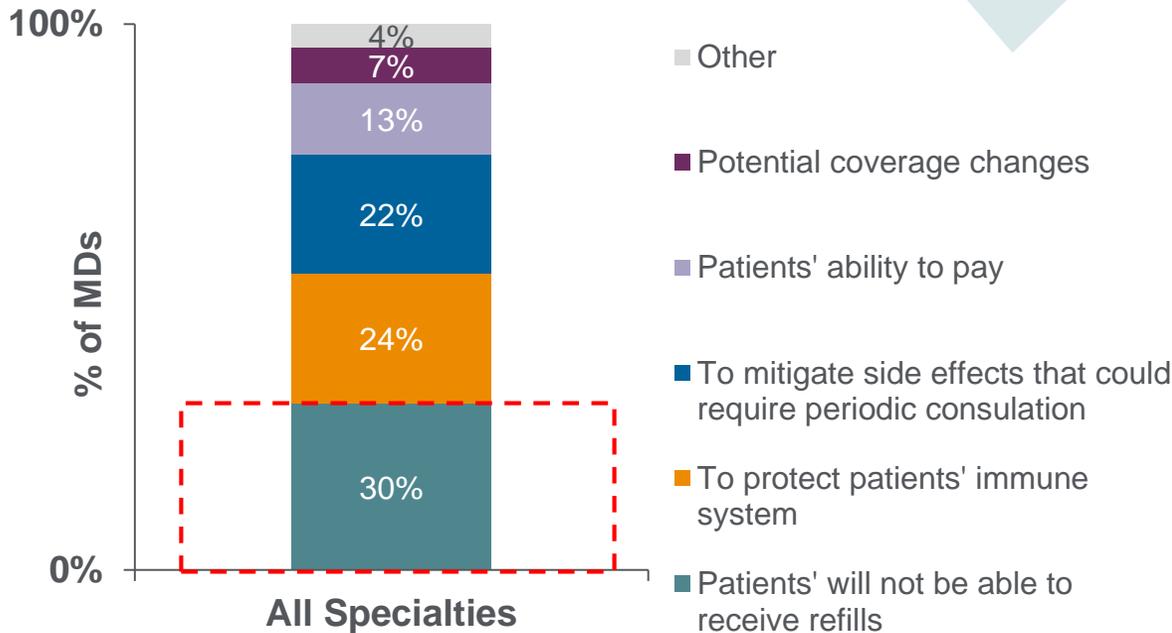
Q: For your anticipated effect to Treatment initiation, please select the top reason for your score. Q: For your anticipated effect to Treatment Initiation, does your concern relate to a specific class of drugs? Please be as specific as possible.

Discontinuations are expected to rise, although there is a disconnect on the “why” between providers and patients

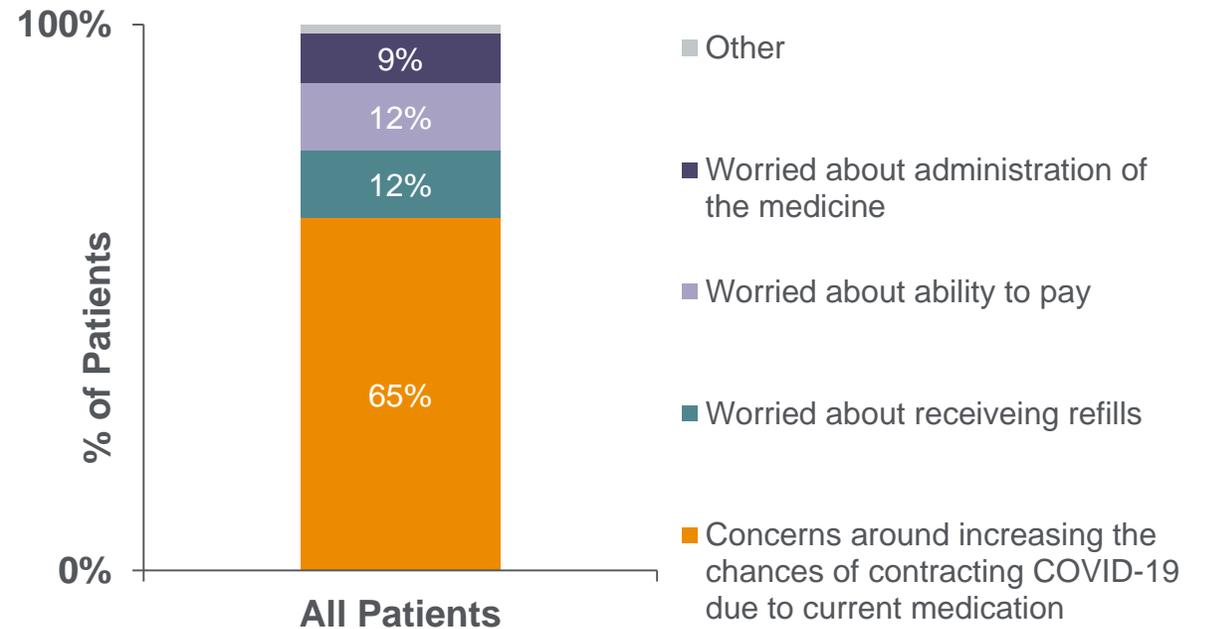
Reasons for discontinuation

- Rheums top reason is to **protect patient’s immune system** from potential adverse events
- Concerns around **medication refills** were especially acute for PCPs

HCPs
n=46



Patients
n=65



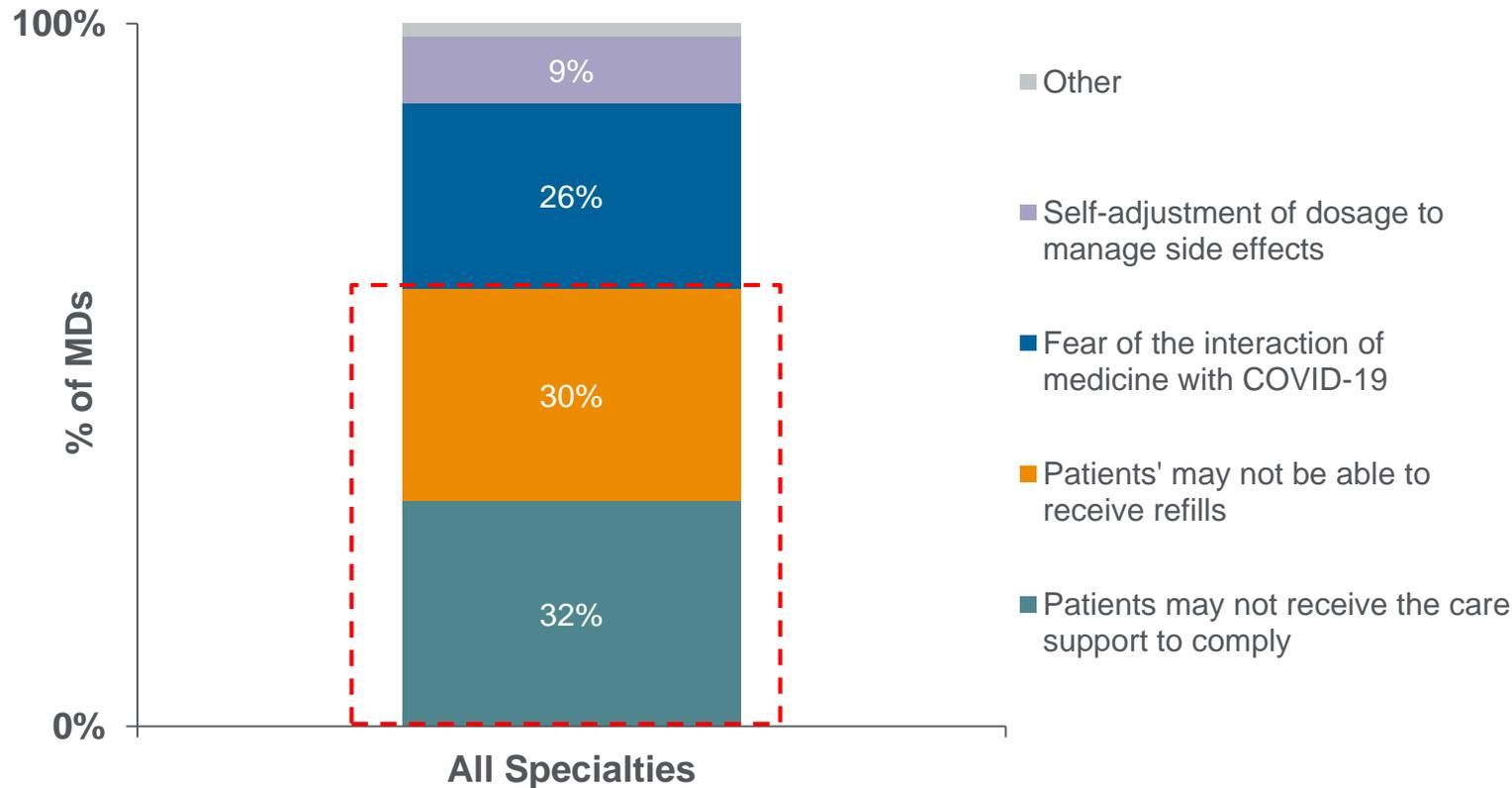
Pharma can address providers’ resource gap through partnerships with local health systems and patients’ knowledge gap by sharing insights about at-risk patients

Q: For your anticipated effect to Discontinuation of current medication, please select the top reason for your score.
 Q: Please select the top reason which is likely to delay / due to which you delayed or stop you from taking your prescribed medication.

Compliance will likely dip as care support and refills are more difficult to receive

Reasons for compliance concern

n=53 MDs



Other Considerations

- **Rheums** think patients will not comply due to a fear of how their medicine will interact with COVID - 19
- **PCPs, Cardiologists and Neuros** are most concerned about patients receiving sufficient refills to comply to their prescribed dosing regimen – many of their prescribed drugs are already known to be in short supply

Field personnel such as nurses and educators could be re-deployed to address patient support concerns

Q: For your anticipated effect to Compliance to recommended dosing regimen, please select the top reason for your score.

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Pharma can rise to the occasion in many ways

"Maybe [Pharma Companies] could have a system where **samples** could be delivered to patients. If the doctor gives consent. I mean I don't know how the legalities would work out.

And **have a contact person** who could coordinate that instead of having everything on our **staff who are really overworked** right now.

And maybe if the manufacturers could have **at-home testing**, come up with some **ideas for labs** that we need to get these patients on these drugs.

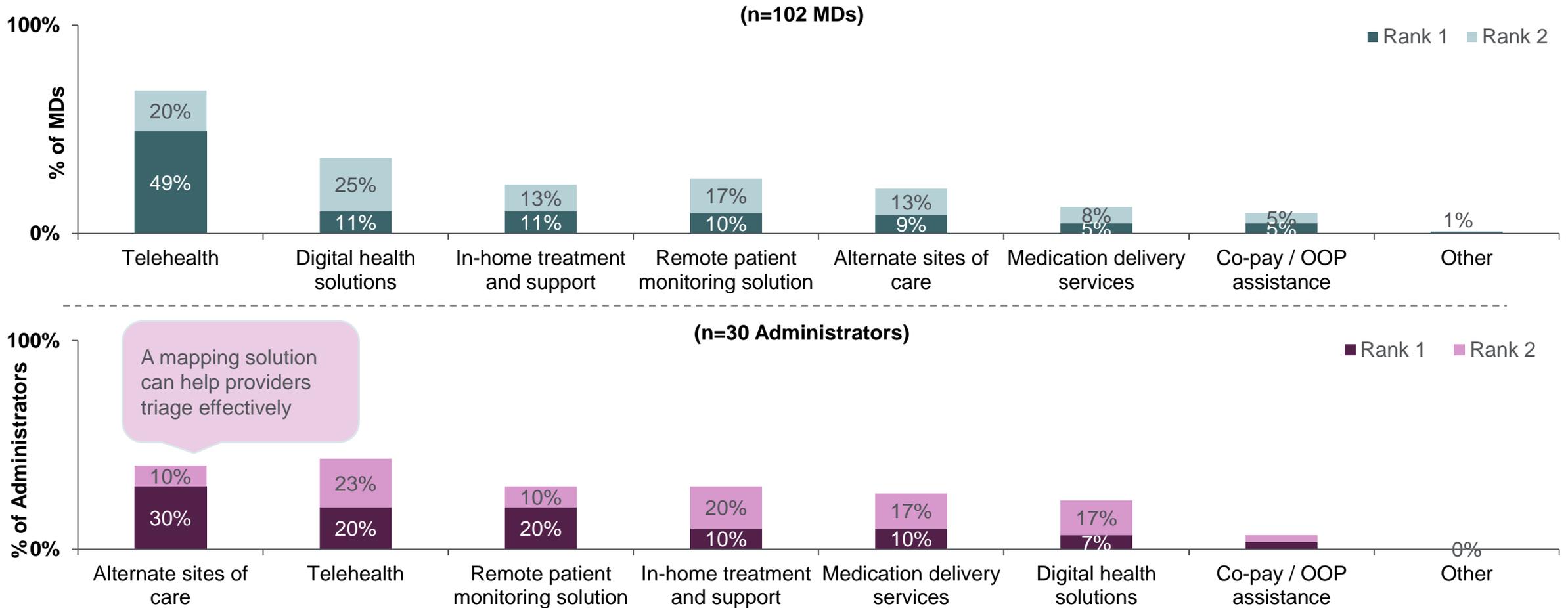
-Neurologist



Physicians need telemedicine to see patients remotely while administrators need help managing in-person patient volume

Most helpful support mechanisms

% ranking in top 2

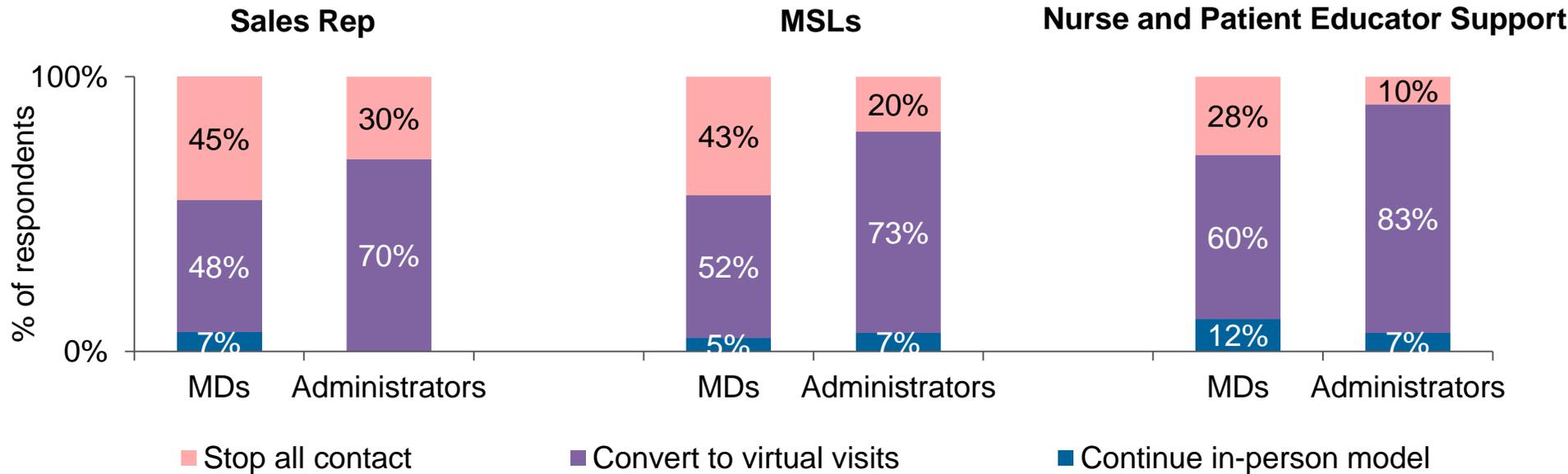


Q: In light of COVID-19, which of the following potential support mechanisms do you envision as improving your practice's ability to provide care? Please rank from most to least helpful, with 1 being the most helpful.

Pharma should not necessarily stop all contact but selectively convert to virtual visits, especially for nurse and patient educator support programs

Preferences for field engagement

% of respondents, n= 102 MDs | 30 Administrators



*"I have had some **phone contact** with reps. So far this **has been helpful**, more should employ this technique."
–Neurologist*

*"They need to **stop all contact**. We don't want their bodies around to potentially **acquire and/or spread disease**."
–Infectious Disease Specialist*

- **Community MDs prefer a stop** in all rep contact, while Academic and Private MDs prefer virtual rep visits
- **Pulmonologists, Neurologists and PCPs prefer a stop** in rep contact

- **Cardiologists and Endocrinologists are especially favorable to virtual** nurse and patient educator visits

- **PCPs – inundated with patients suspected or having COVID-19 – prefer a complete stop** of MSL contact

Q: Which of the following best represents your attitudes about manufacturer field personnel support at this time:

Pharma can support patients and providers by amplifying existing support and creating new services

Most helpful manufacturer support options

% of respondents ranking top support option, n=102 MDs | 30 Administrators | 202 Patients



MDs



Administrators



Patients

1.	Additional practice support for treatment fulfillment	20%
2.	Delivery / mail order of medicines	18%
3.	Increase co-pay assistance and other financial support	16%
4.	Increase availability of product samples	15%
5.	Help with patient support directly	13%

	Create unbranded educational material on COVID-19 and its impact on other conditions	23%
	Best practices and protocol for handling COVID-19	23%
	Help with patient support directly	17%
	Delivery / mail order of medicines	13%
	Increase availability of product samples	13%

	Delivery / mail order of medicines	22%
	Increase copay assistance and other financial support	17%
	Free access to telemedicine consultations	13%
	Transportation services to get me to my appointments	12%
	Free nurse or health care expert hotlines	12%

Pharma should partner to quickly provide services that sit outside the core business model

Q: How could the manufacturers of medicines/pharmaceutical companies best support you, your practice and your patients at this time? Please rank the choices from most to least supportive.

The most immediate relief can be provided through existing support mechanisms, such as samples and fulfillment process assistance

Online / Digital support

Patient support COVID-19 testing kits

Cost / financial assistance

Medication / Device Samples

Protective equipment Faster response rate
Mail delivery

Research for COVID-19

Co-pay support

Telephone support

Prior authorizations



Q: What types of manufacturer (drug and device) engagement would be most beneficial to your practice and patients at this time?

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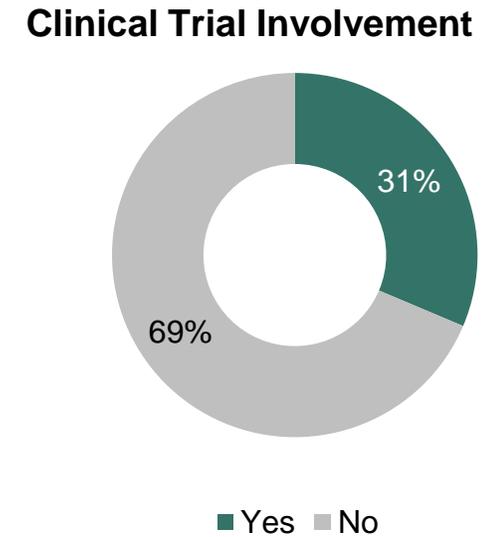
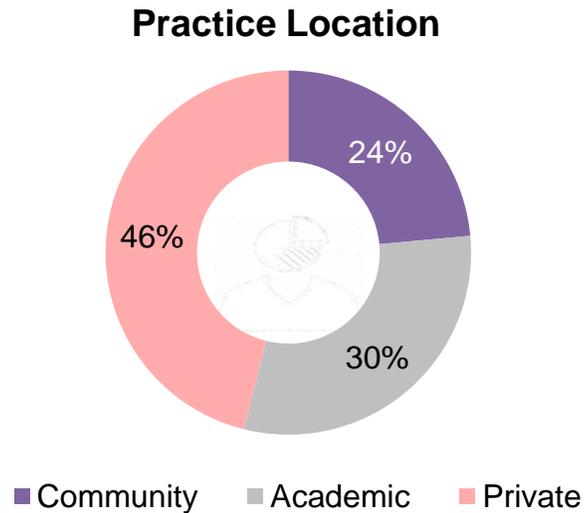
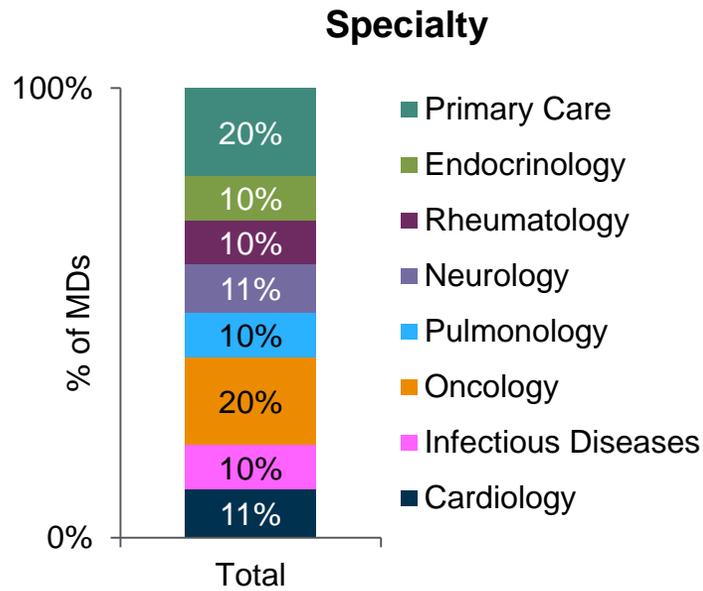
Over 100 doctors participated in our effort to understand the implications of COVID through an online survey

Study and Respondent Information

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Practice Characteristics and Demographics

% of MDs



Over 200 patients participated in our effort to understand the implications of COVID through an online survey

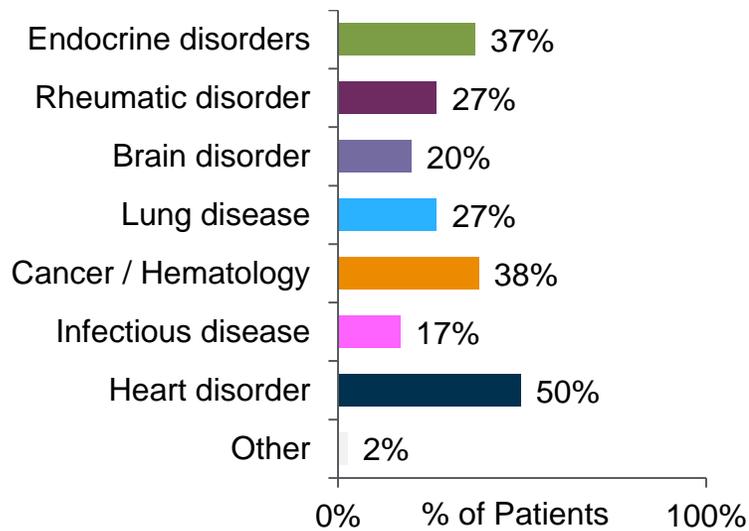
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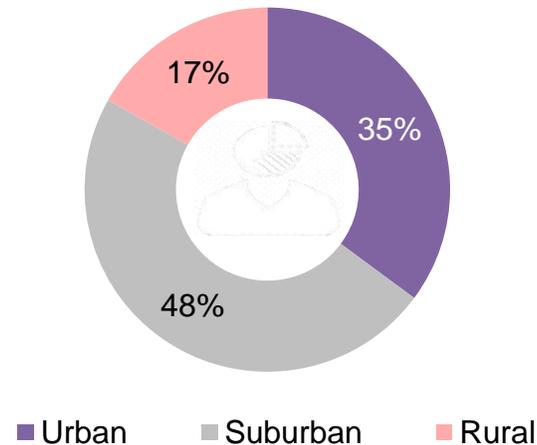
Patient Characteristics and Demographics

% of Patients

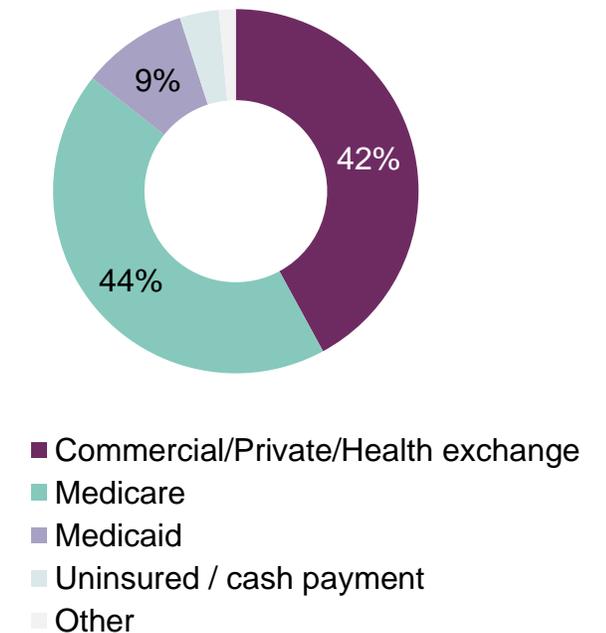
Patient Diagnosis



Location



Insurance Coverage



30 administrators participated in our effort to understand the implications of COVID through an online survey

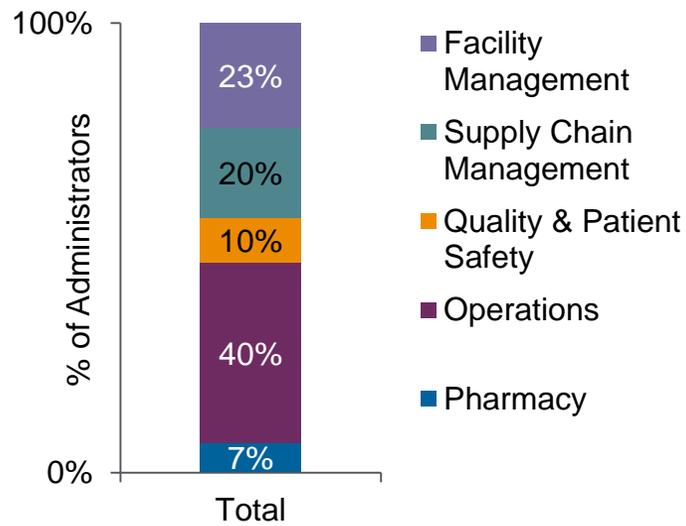
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<p>FIELDING DATES Mar 23 – Mar 27, 2020</p> 	<p>RESPONDENTS 30 Administrators</p> 	<p>DATA COLLECTION Online Quantitative Survey</p> 	<p>SURVEY DURATION 10 Minutes</p> 
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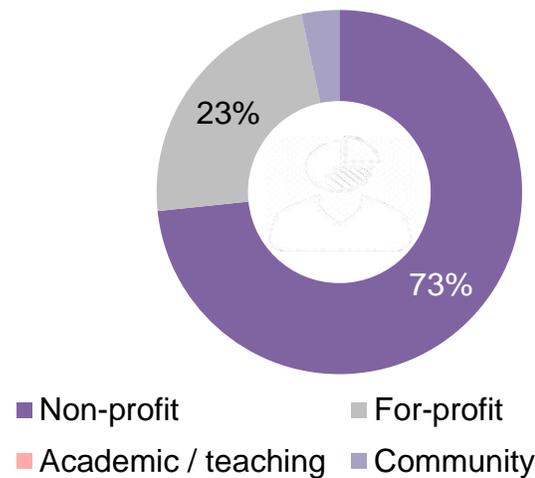
Practice Characteristics and Demographics

% of Administrators

Administrator Function



Classification of organization



Member of P&T Committee

