

# Coming Full Circle with COVID & Cancer:

## How 2020 Learnings Will Impact Our 2021 Approach

# COVID-19 adds additional layers of concern for cancer patients



PHYSICAL

49%



FINANCIAL

29%

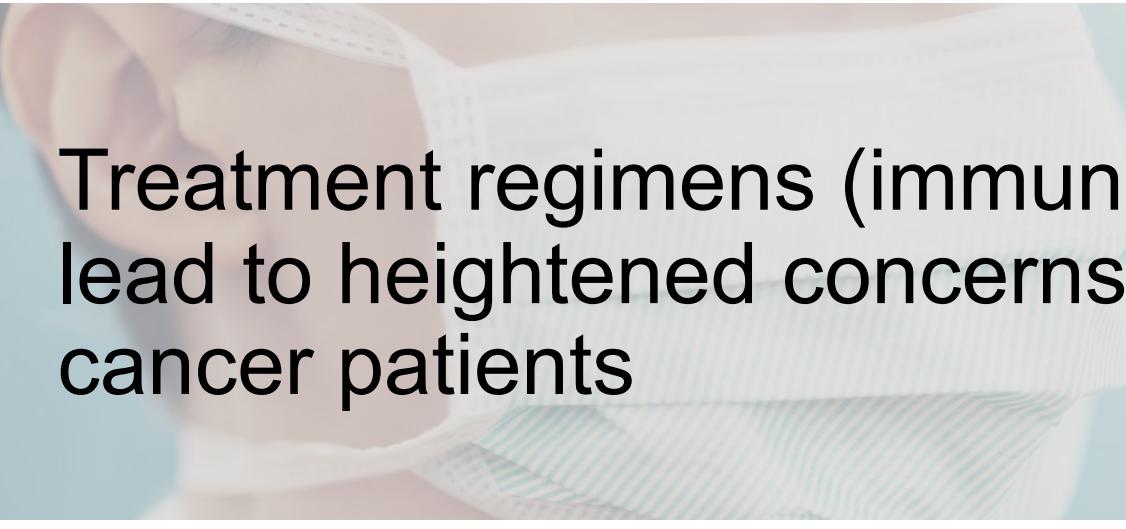


MENTAL

20%



Two-thirds (64%) agree that the combination of battling cancer and dealing with the pandemic has added to their mental distress. At the same time, they feel more prepared to deal with the pandemic.



# Treatment regimens (immunotherapy or chemotherapy) lead to heightened concerns around COVID-19 for 59% of cancer patients

## Impact of COVID-19 on their health

- 63% were concerned with **COVID-19 transmission**; 51% were less likely to see their doctor in person
- More than one-half **delayed screening** or treatment during the initial wave; 66% of those **suffered negative consequences**
- Of those in a **clinical trial**, 75% had the trial paused as a result of COVID-19

## COVID-19 Experience & Outlook

- 15% of respondents were **diagnosed with COVID-19**; more than half did not feel it was as bad as they thought it would be
- Only 10% of **females**, compared to one-third of males, were diagnosed with COVID-19
- 58% are somewhat/very **likely to get a vaccine** for COVID-19 when it first becomes available

# 75% have used telehealth

 53% had a standard appointment with their doctor

 27% had a consultation for a new condition/symptom

68%

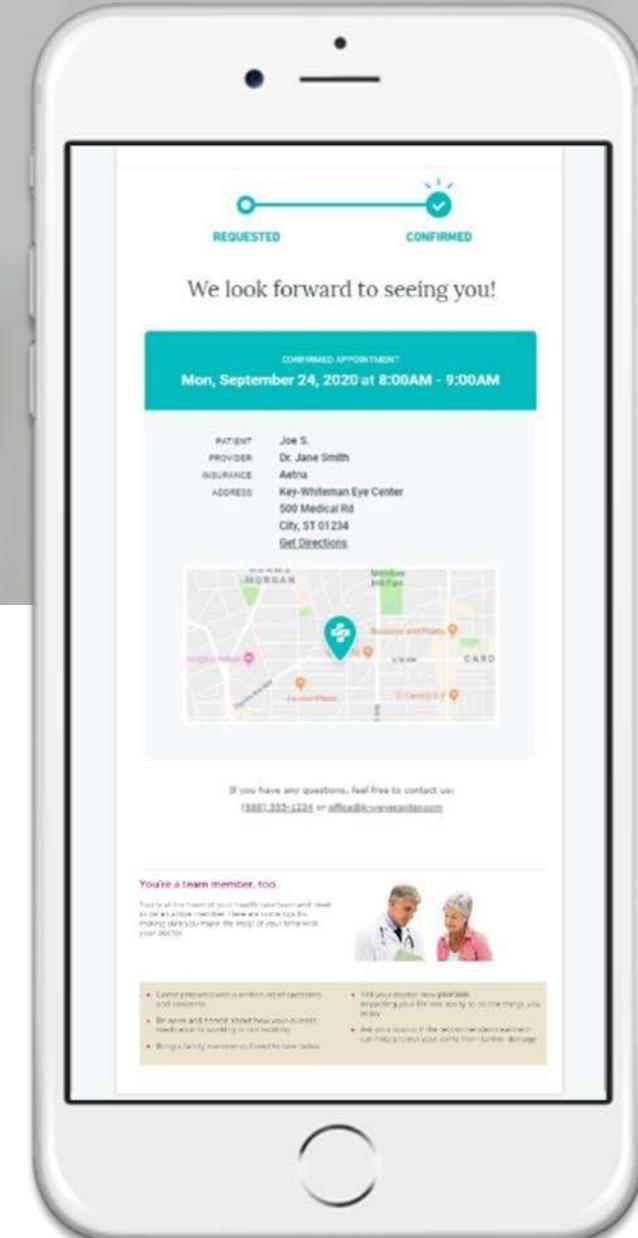
Find value  
communicating  
via text/email  
during the visit

64%

Had a **very**  
**positive** telehealth  
experience

63%

Would like to receive  
patient education materials  
while waiting for their  
telehealth visit to start



# The Patient/Physician Connection

Compared to before COVID-19...

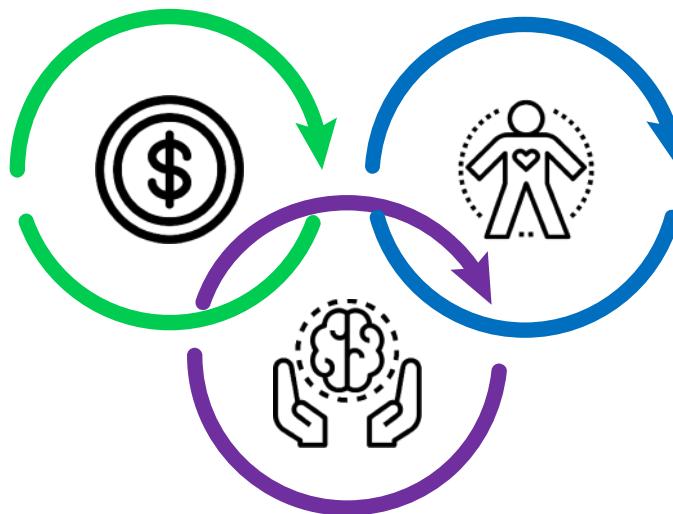
## Financial

**70%** Talking to patients about finances before prescribing treatments

**59%** Helping patients manage financial concerns (loss of employment/healthcare, or simply not being able to afford treatments)

When rating the value of oncology resources, **Patient Assistance Programs** was the only resource to be rated **Extremely Important** by over **50%** of respondents

**63%** believe that social distancing regulations at hospitals/practices/clinics are frustrating to patients



## Psychological

Physicians are split regarding if telehealth has a negative psychological impact on patients

No	Not Sure	Yes
<b>33%</b>	<b>34%</b>	<b>30%</b>

## Physical

I have the necessary tools at my disposal to keep my patients healthy **83%**

Telehealth offers my patients a safe alternative to in-person visits **77%**

Concerns about likely higher lethality of COVID-19 in immunocompromised patients **-41%**  
(After lifting restrictions)

Delaying screenings/testing for a patient that I would not have a year ago **49%**

Physicians reported no increased concern about access to caregivers or support networks during COVID-19

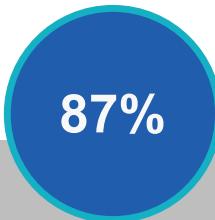
# The Physician/Pharma Connection

Unlike the larger HCP population, oncologists acknowledged value in the pharma rep role, and report a higher willingness to meet with pharma sales reps, particularly in-person/in-office.

While oncologists are more willing to meet with manufacturer reps, they did not indicate a significant deficit in having limited rep interaction during COVID-19; although most respondents have not interacted with a rep since April, they rated rep engagement as “somewhat valuable,” and did not list rep interaction as a primary program/service they would like to see pharma offer during this time.



In-person/ in office rated as the most effective kind of interaction with pharma reps.



Pharma Medical Science Liaison rated somewhat-to-extremely valuable

# Patient Assistance

*A primary onc focus*

A teal circular graphic containing the white text "54%".

**Patient Assistance Programs -**  
the only pharma resource ranked Extremely Valuable by more than 50% of respondents.

A teal circular graphic containing the white text "73%".

**Patient Assistance/Copay Support -**  
the overwhelmingly most-requested “programs and services you would like to see pharma providing to Oncologists during this time.

**During this period my patients need more support from...**

(Top 3)

- **67%** = Nurse Navigators
- **57%** = Patient Assistance Programs
- **56%** = Case Managers

# Strategic Marketing Response

- Empathy
- Start by Listening
- Back to Basics
- Be Where They Are

A photograph of a medical consultation. A male doctor in a white coat and a blue surgical mask is seated, facing a pregnant woman who is also wearing a blue surgical mask. She is wearing a light-colored blouse with dark polka dots and brown trousers. They appear to be in a clinical setting with a whiteboard and a chair visible in the background.

**THANK YOU**

**More to come in December**