



Coming Full Circle with COVID & Cancer:

How 2020 Learnings Will Impact Our 2021 Approach

December 10, 2020



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EVERYDAY HEALTH™

EVERYDAY HEALTH
PROFESSIONAL

Patients & Physicians



Financial Concerns

59%

Oncologists helping patients manage financial concerns (loss of employment/ healthcare, or simply not being able to afford treatments)

29%

Patient Concern

Financial wellbeing was a distant second concern for patients

vs.

70%

Oncologist Concern

Oncologists talking to patients about finances before prescribing treatments

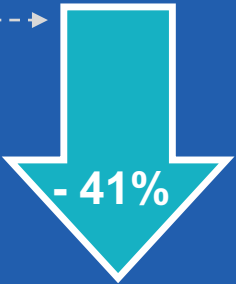
Physical Care

Patient Concern

Oncologist

49%

Physical wellbeing is patient's primary concern



Oncologists say they have the necessary tools at their disposal to keep patients healthy

83%

Reduction in Onc concern for higher lethality in immuno-compromised patients

Patients

Oncologists

52%

Have delayed screenings or treatment

Have delayed screenings or testing

49%

66%

Had a negative consequence

Patients & Physicians



Telehealth Snapshot

- 75%** Of **Patients** have used Telehealth
- ~80%** **Oncologists** expect ~80% of their patients to be seen in-person
- 77%** **Oncs** report telehealth offers patients a safe alternative to in-person visits
- 64%** **Patients** had a **very positive** Telehealth experience
- 63%** **Patients** would like to receive patient-ed materials prior to their telehealth visit
- +50%** **Oncs** rated Patient Ed & Patient Assistance as the most important pharma resource

Telehealth Complications

Patients

Primarily rely on **their physicians** for Patient Education, but...
...report **receiving less** Patient-Ed resources in the Telehealth-era.

Oncs

Despite recognizing the **safety benefits** of telehealth medicine...
...report some insurers being **unwilling to compensate** HCPs fairly for telehealth visits.

Does Telehealth have negative psych impact on patients?

YES

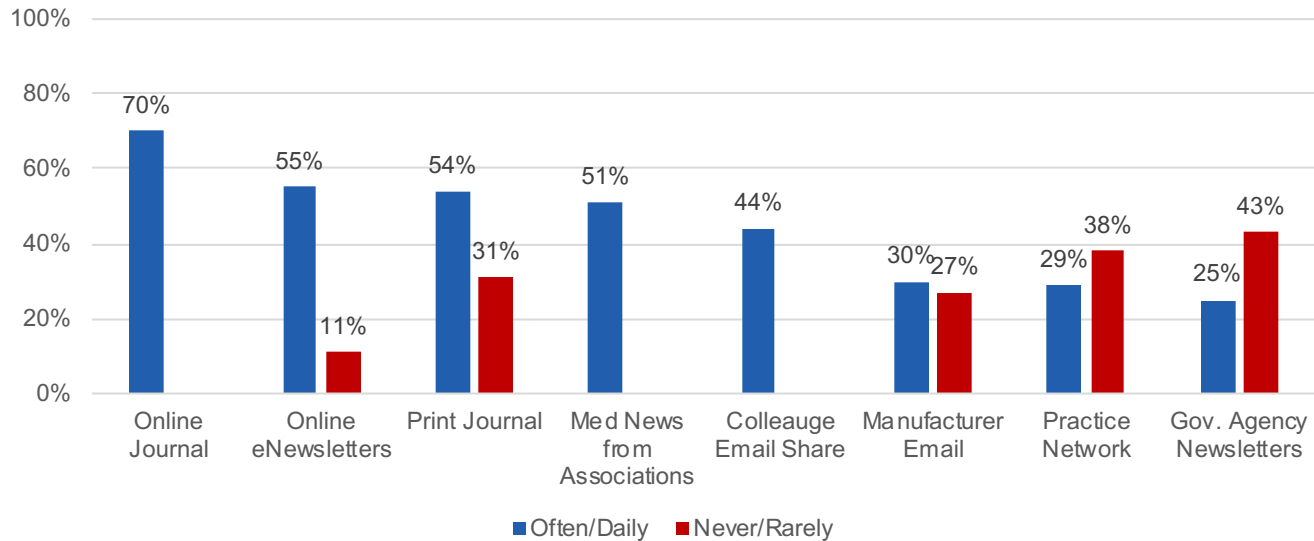


NO

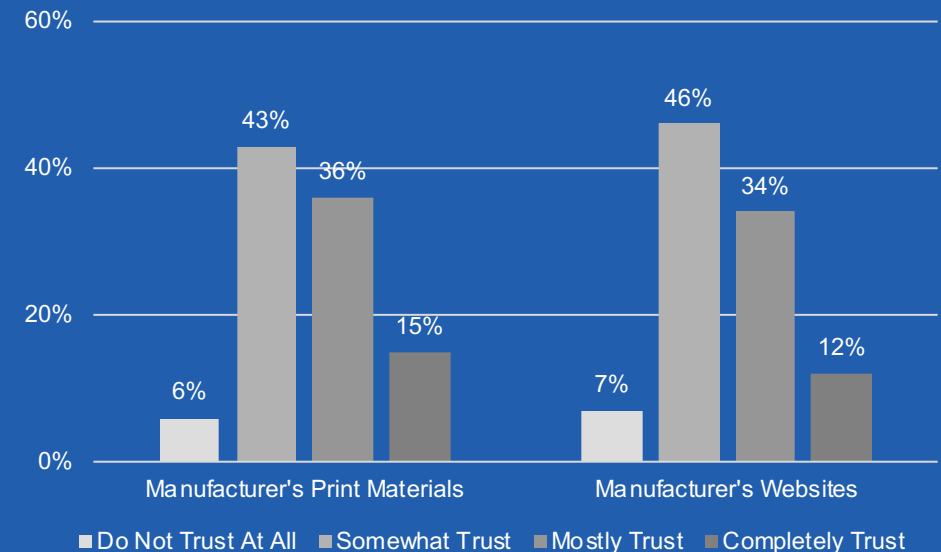
NOT SURE

Preferred Information Sources

How do Oncologists keep up-to-date about medical information?



Onc Pharma Resource Trust



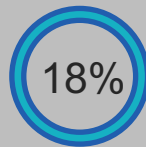
Patient Information Preferences



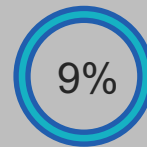
Their Physician(s)



General Health Info Websites



Pharma Website



Chat Rooms/
Social Networking



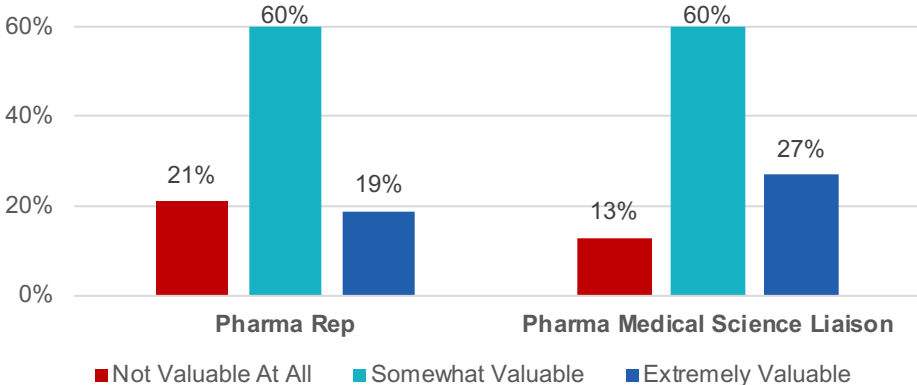
Physicians & Pharma

85%

HCPs agree it's appropriate for pharma to continue product promotion during the pandemic.

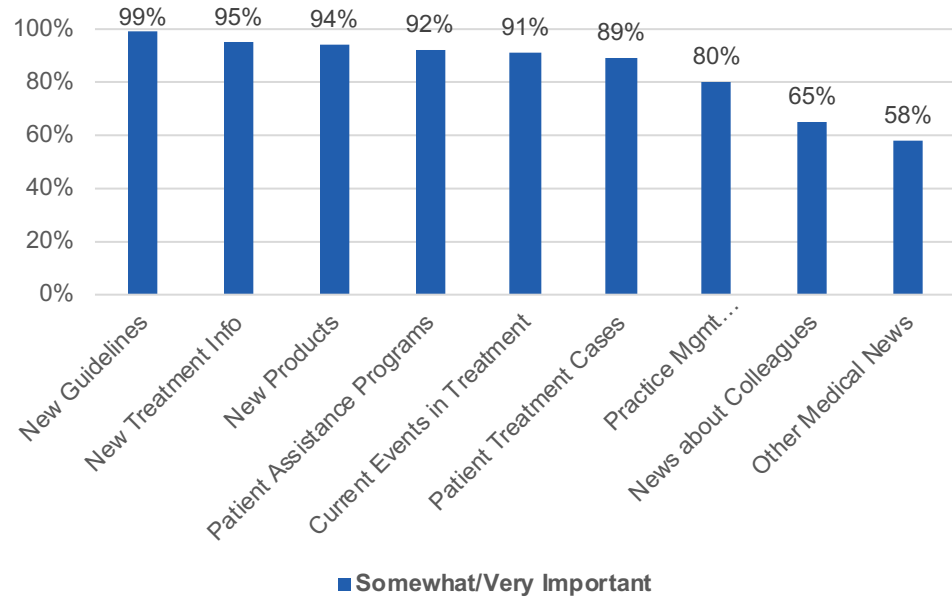
- Most Oncs have met with 2 – 4 Sales Reps since April (largely by 1-on-1 virtual meetings or Webinars/Zooms)
- While Oncs rated **in-person meetings** as the most effective form of Sales Rep engagement, **74%** have not held in-person meetings since April.
- When asked to rate the value of pharma resources, **Patient Assistance** and **Professional Education Courses** outperformed all others

How do you value the following pharma resources?



Perceived Resource Value

Top Information Oncologists Are Seeking



Media Vitals Top 3

- 1a: New Products
- 1b: Patient Assistance
- 3: Safety & Efficacy Info on Products they Currently Use



Virtual Conference Coverage

2020 Virtual ASCO

Greater Social Engagement

Increased Patient & Advocate Connectivity



Significant 2020 conference traffic on MedPage Today and Everyday Health

Patient Assistance & Patient Education

54%

Patient Assistance Programs

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

73%

Patient Assistance/Copay Support

- the overwhelmingly most-requested "programs and services you would like to see pharma providing to Oncologists during this time."

A photograph of a doctor in a white lab coat and a light blue surgical mask kneeling on the floor to talk to a patient. The patient is a woman with curly hair, wearing a light-colored shirt with dark polka dots and a light blue surgical mask. They are in a clinical setting, possibly a hospital room, with a whiteboard and some papers visible in the background. The image is overlaid with a semi-transparent dark grey rectangle containing white text.

THANK YOU
(Additional Panel Consideration)