

SYNEOS HEALTH—SNAPSHOT STUDY

# COVID-19 Pandemic Fuels Surge in Telemedicine and Virtual Field Force Engagements

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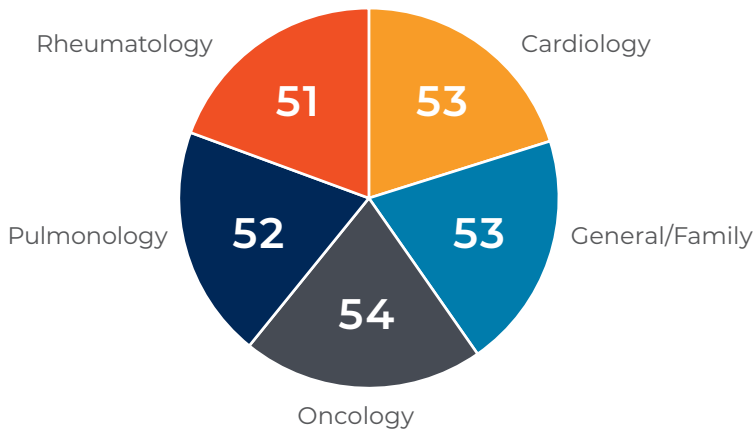
*Elizabeth Katta, Lead Researcher*

## Has the coronavirus pandemic become a boon for telemedicine and teledetailing?

The answer is overwhelmingly “yes”, according to a just-released survey conducted by Syneos Health.

The online Sermo survey conducted on March 25, 2020 reflects the views of 263 US clinicians across a range of specialties.

### Number of Respondents by Specialty

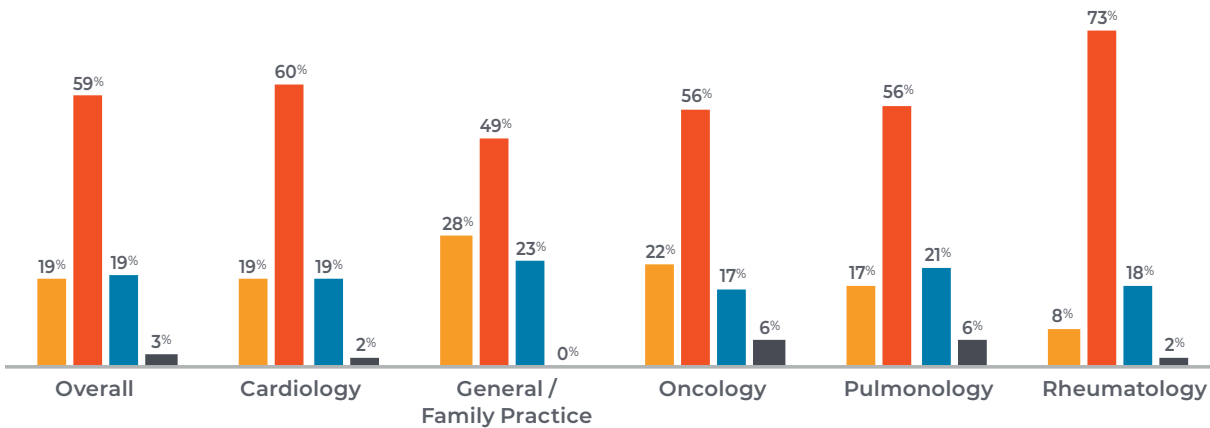


In direct response to government advisories limiting nonessential travel, physicians have been quick to adopt telemedicine platforms for engaging with patients. While only 19% of practices had set up such platforms prior to the COVID-19 pandemic, today 97% are either establishing such platforms or expect to do so in the near future. Over half (59%) of all practices surveyed set up these portals specifically in response to the pandemic.

### Practice Set-up for Telemedicine

Q3: How is your current medical practice set up to conduct telemedicine with your patients?

- My current practice has an online platform that we have been using for some time.
- My current practice has an online platform that we have set up in response to COVID-19.
- My current practice is not set up for telemedicine, but we plan to do so shortly.
- My current practice does not plan to establish telemedicine access.

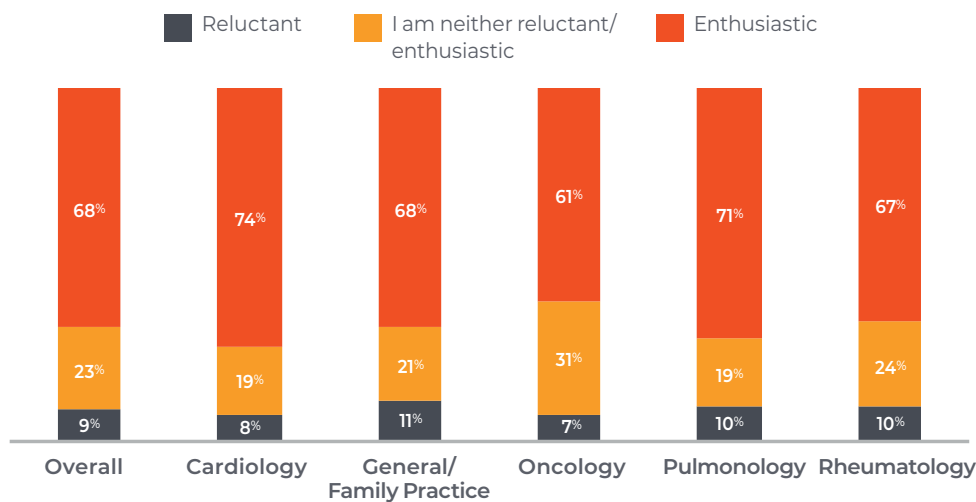


# Physician enthusiasm towards telemedicine has grown

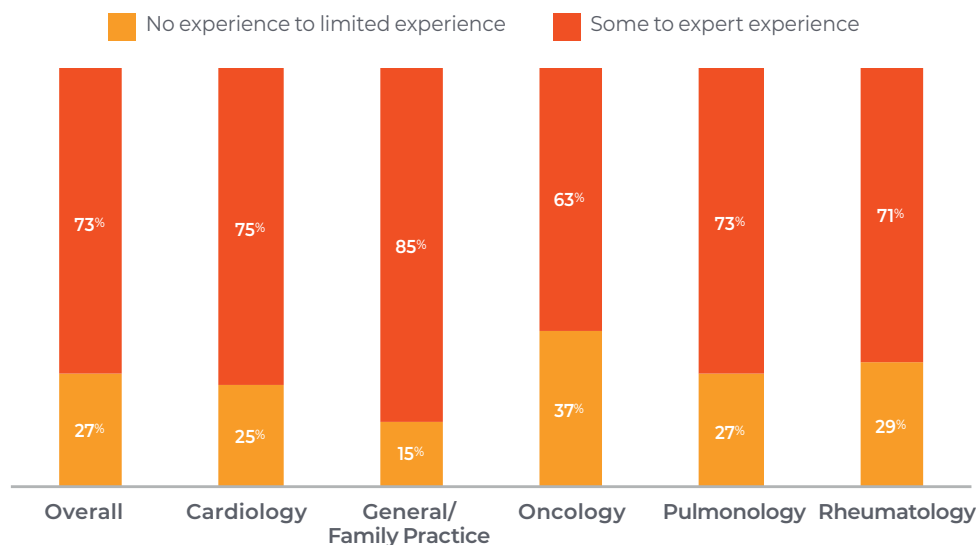
Two out of every three practices were enthusiastic about engaging with patients through a telemedicine platform, with only a small minority (9%) describing themselves as “reluctant” participants. Clinicians also are rapidly developing experience practicing medicine via the Web, with nearly three out of four describing themselves as having “some to expert” experience. Family medicine and general practitioners claim the greatest experience, while oncologists have the least.

## Enthusiasm for Telemedicine

Q2: How enthusiastic are you about engaging with patients through a telemedicine platform?



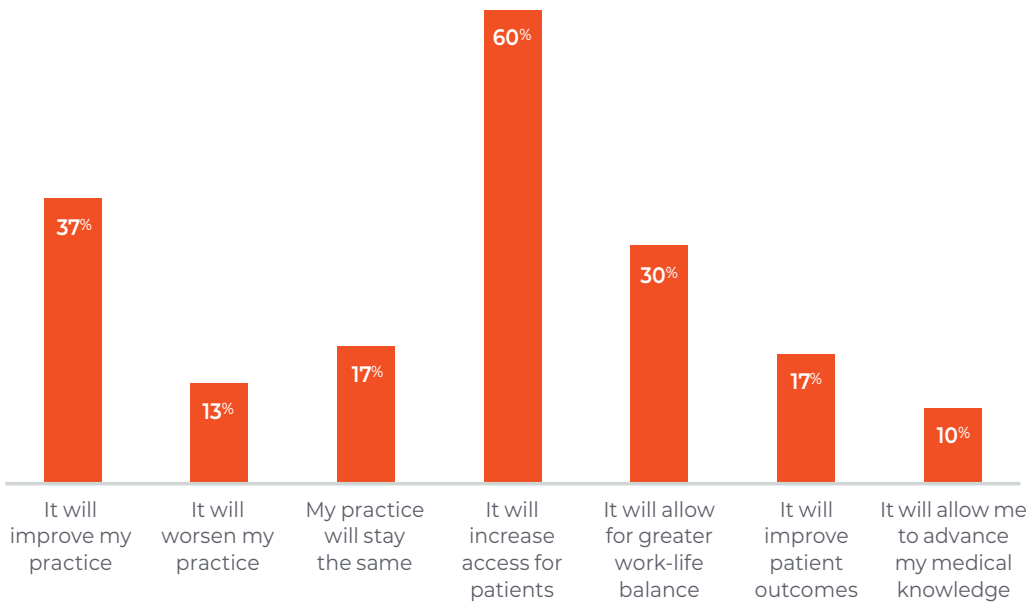
Q1: How would you best describe your overall experience with using a telemedicine platform to engage with patients?



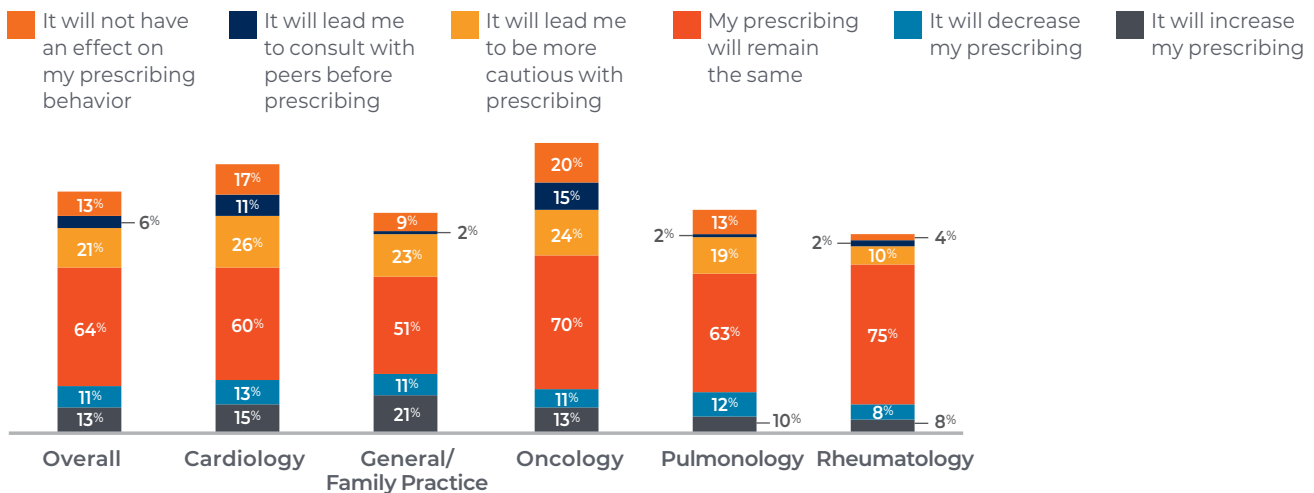
# Benefits foreseen

The physicians surveyed strongly agree that implementing telemedicine will provide greater access for their patients. They also foresee improvements in their overall practice and a greater work-life balance. They are less certain, though, about whether virtual engagements will yield better patient outcomes or advance their own medical knowledge. And they anticipate their prescribing habits will mostly stay the same, though general/family practitioners anticipate a bump in their prescribing in comparison to other specialists.

Q5: What impact, if any, do you think Telemedicine has had/will have on your practice?



Q6: What impact, if any, do you think Telemedicine has had/will have on your prescribing behavior?

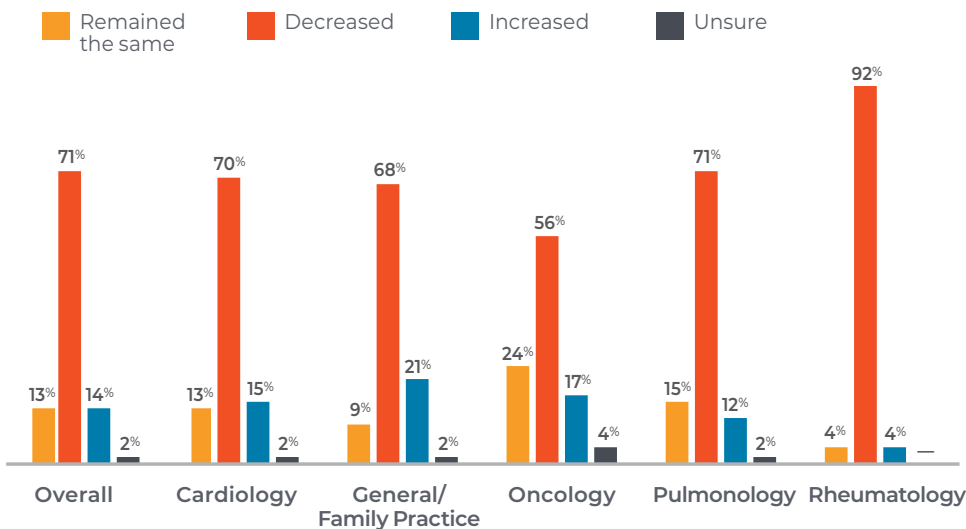


# Reduced patient traffic may help explain new attitudes

Office-based clinicians are seeing fewer patients in person, which may account for some of their new-found enthusiasm for telemedicine. For rheumatologists the drop-off has been particularly acute, whereas the decline has been less marked for oncologists; in both of these specialties, telemedicine may provide the only means through which immunocompromised or otherwise vulnerable patients can connect with their doctors without potential exposure to pathogens.

## Impact of COVID-19 on Patient Volume

Q9: How has the onset of the COVID-19 pandemic changed the volume of your patient visits?



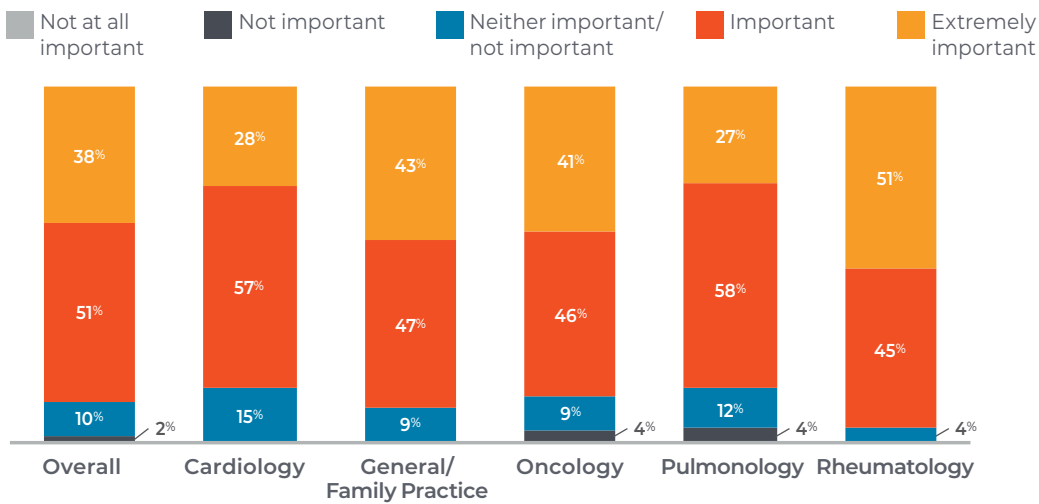
# Multiple platforms support telemedicine

Teladoc Health, MD LIVE, and Doctor on Demand are the most popular platforms reported by survey respondents. Physicians also indicated that they are using an enhanced MyChart telehealth application from Epic and SimplePractice from Doxy, with the teleconferencing app Zoom acting an alternative when needed.

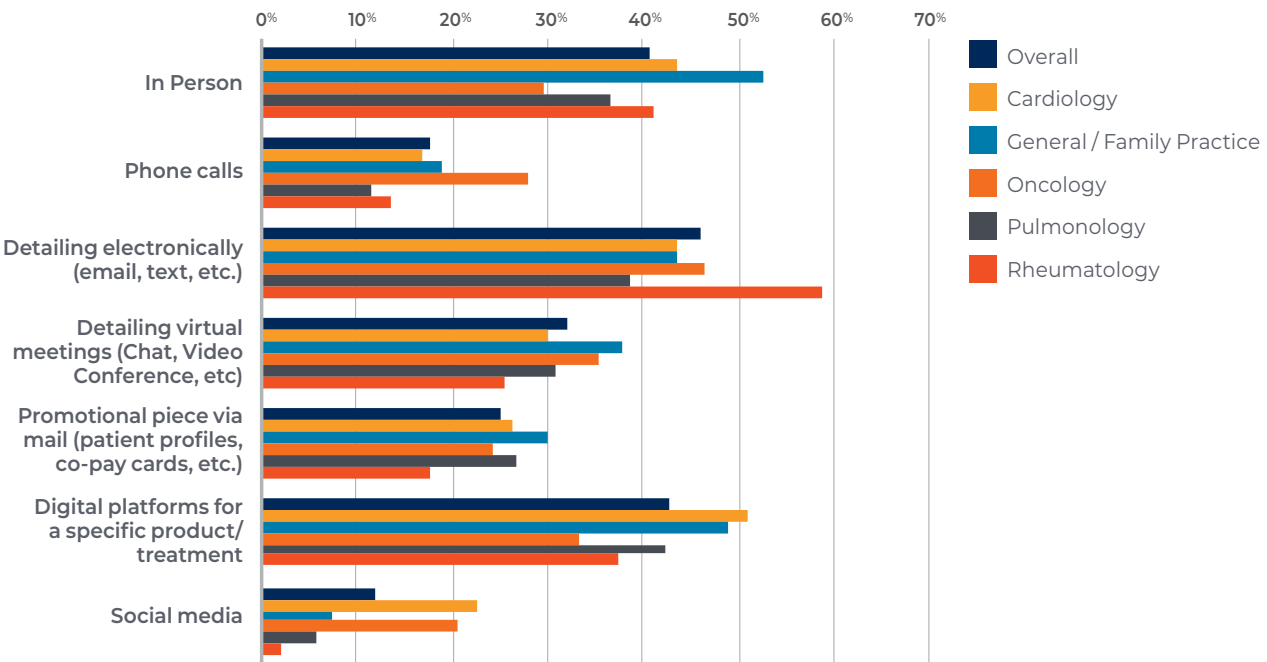
# Keeping up: Sales rep engagements still matter

Overwhelmingly, respondents agree that it is important to keep up to date with specific product or treatment information, which they would like to do in person, electronically (email, text, etc.) and through digital platforms.

Q17: How important is it to you to stay up to date with product information in the future?



Q18: Given the option, how would you like to access the product information?

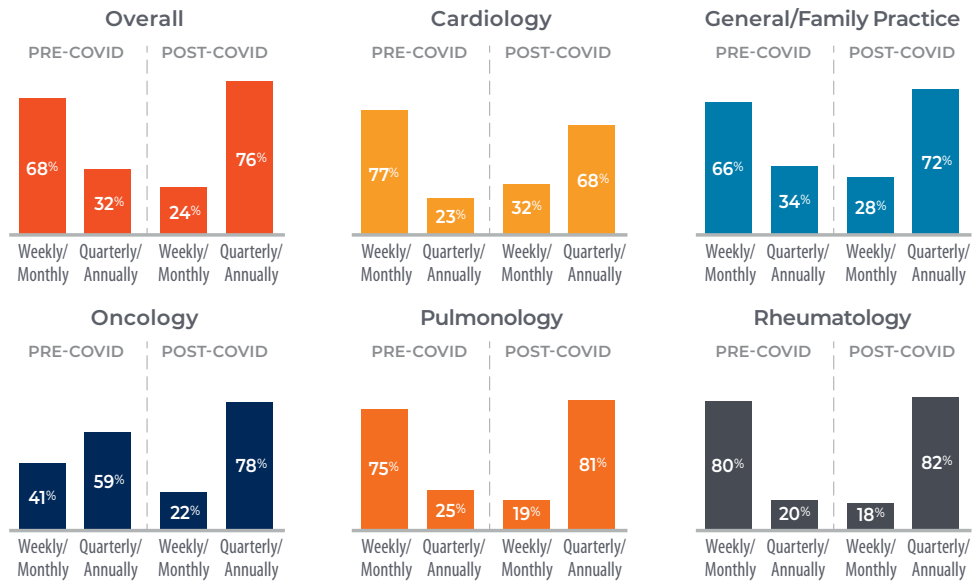


# Physicians see a shift from in-person to virtual sales calls

Prior to the pandemic, physicians typically connected with sales reps on a weekly to monthly basis. Pulmonologists and rheumatologists saw reps slightly more frequently, and oncologists noticeably more so. During and after COVID-19, however, all anticipate a dramatic drop in these interactions, down to a quarterly to bi-annual basis.

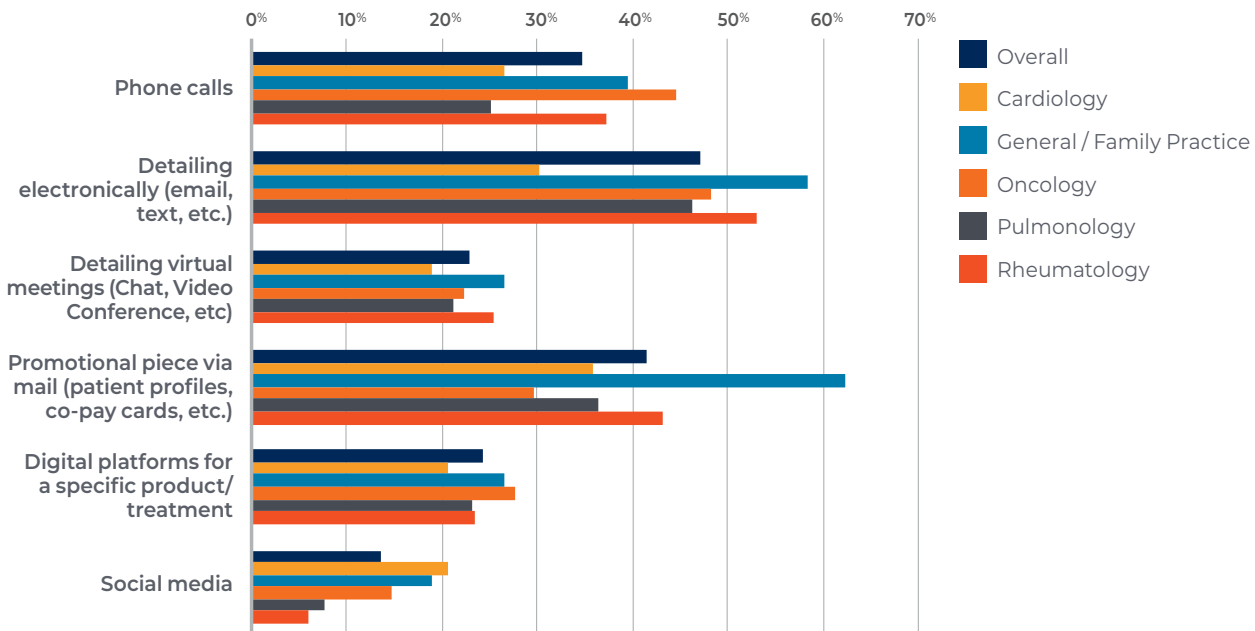
Q10: Prior to COVID-19, how often did you engage with a pharmaceutical sales rep/s with whom you had the most frequent in-person interactions?

Q11: During/post the COVID-19 pandemic what do you think the frequency of these in-person interactions will change to?



Besides in-person visits, the most popular channels of engagement varied across the specialists but, overall, email, text and conventionally mailed promotional pieces were the most popular.

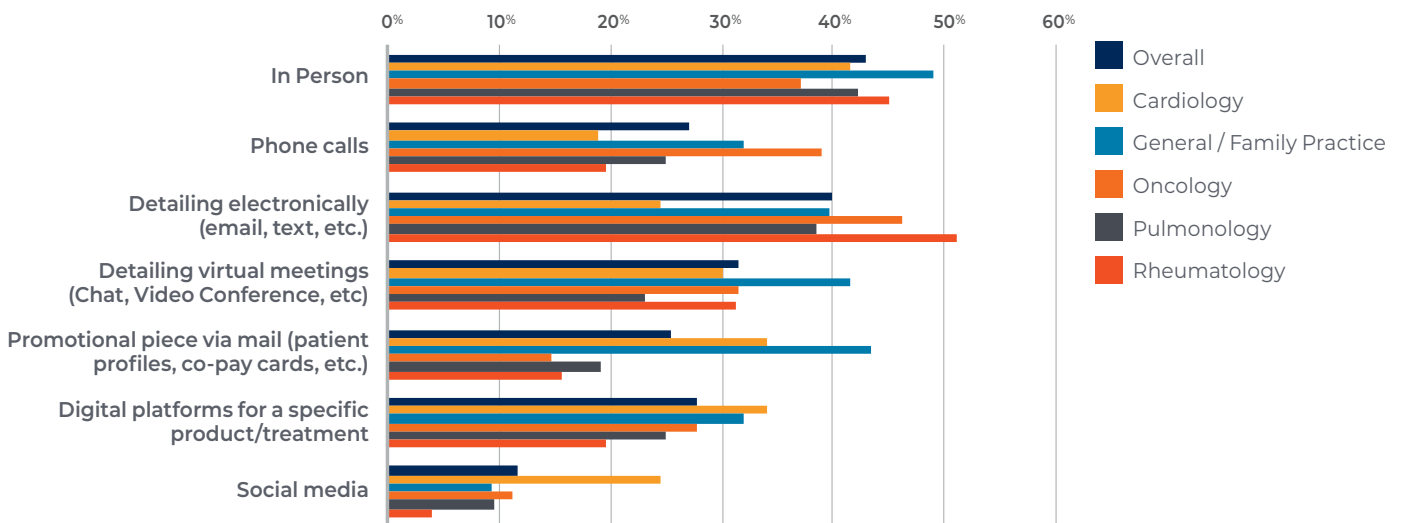
Q12: Other than in-person visits, how else did you interact with pharmaceutical sales reps in general (in a pre-COVID-19 world)?



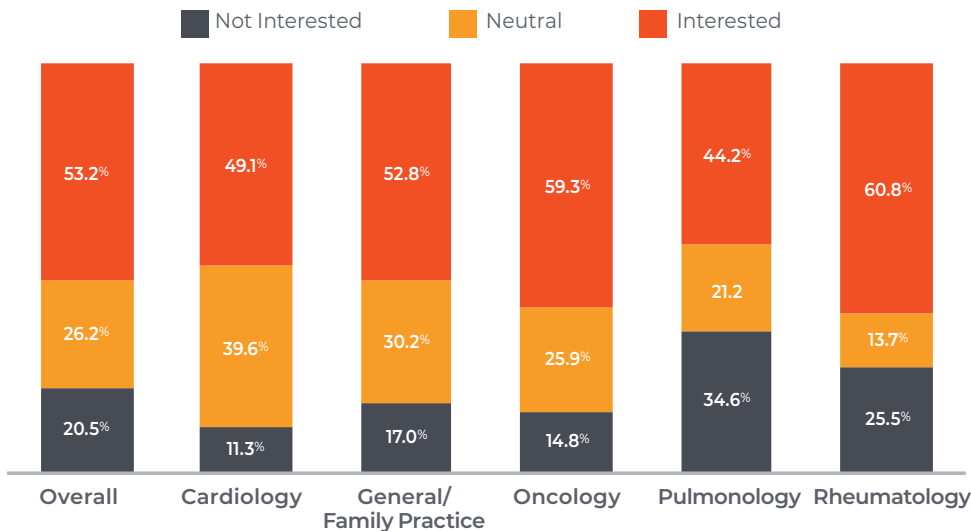
# They expect in-person engagements to remain most popular

Perhaps surprisingly, most physicians agreed that once the COVID-19 crisis has resolved, in-person engagements with sales reps will remain most preferable, followed by detailing electronically (email, text, etc.) and virtual meetings (chat, video conference, etc.). Only a slim majority of physicians we contacted are interested in shifting from in-person engagements to virtual meetings.

Q13: Looking to the future, how would you most like to engage with pharmaceutical reps?



Q16: Given the current healthcare climate, how interested are you in shifting your in-person field team engagements to virtual meetings (Phone calls, Video Conferences, Chats, etc.)





# SALES REPS ARE THE **MOST POPULAR** AMONG FIELD TEAM MEMBERS

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One thing has not changed: Across all specialists, sales reps emerged as the most popular of the pharmaceutical field team members followed by MSLs. Doctors, it seems, still find value in their visits (physical and virtual) from the pharma industry.

## SURVEY LIMITATIONS

This is a periodic survey reflecting a “snapshot in time,” conducted with a convenience sample of 263 US-based HCPs registered with Sermo.com. HCPs surveyed included Cardiologists (N=53), General Practitioners (N=53), Oncologists (N=54), Pulmonologists (N=52) and Rheumatologists (N=51).

Date: 26 March 2020





## Syneos Health. Insights Hub

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The Syneos Health Insights Hub generates future-focused, actionable insights to help biopharmaceutical companies better execute and succeed in a constantly evolving environment. Driven by dynamic research, our perspectives are informed by our insights-driven product development model and focused on real answers to customer challenges to help guide decision making and investment.

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