

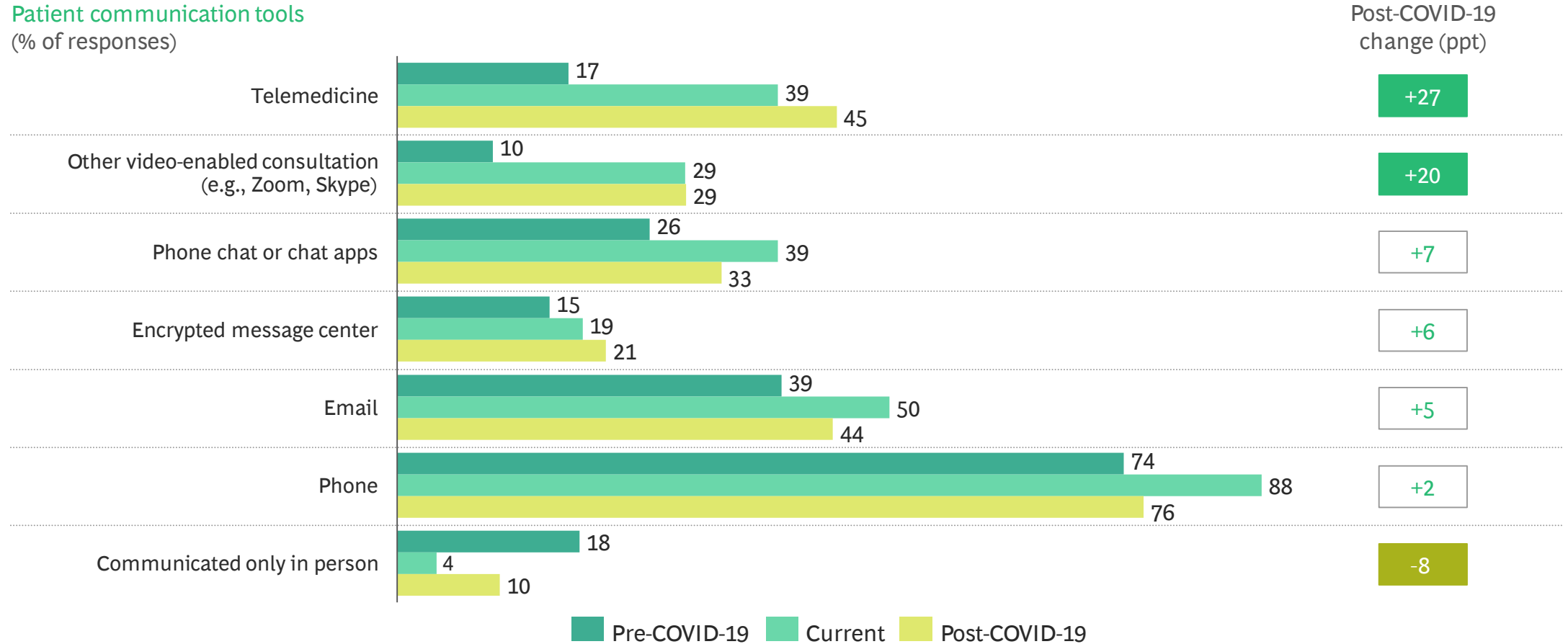
COVID-19

What Doctors Want and What This Means for Biopharma Now

Survey conducted May/June 2020

Telemedicine and Video-Enabled Tools Are on the Rise for Patient Consultations

Patient communication tools (% of responses)



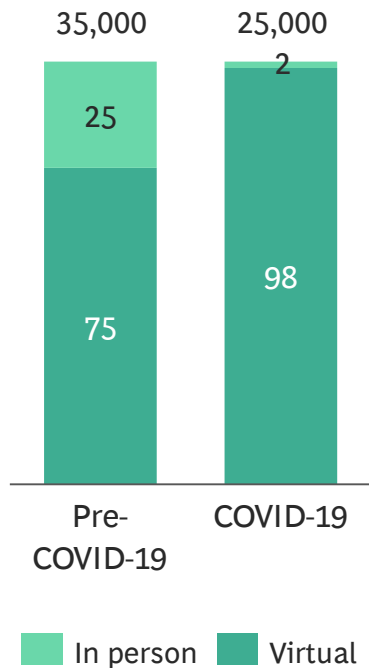
Sources: Physician COVID-19 Response Biopharma Survey, May 2020; BCG analysis.

Note: Not all sums total accurately because of rounding.

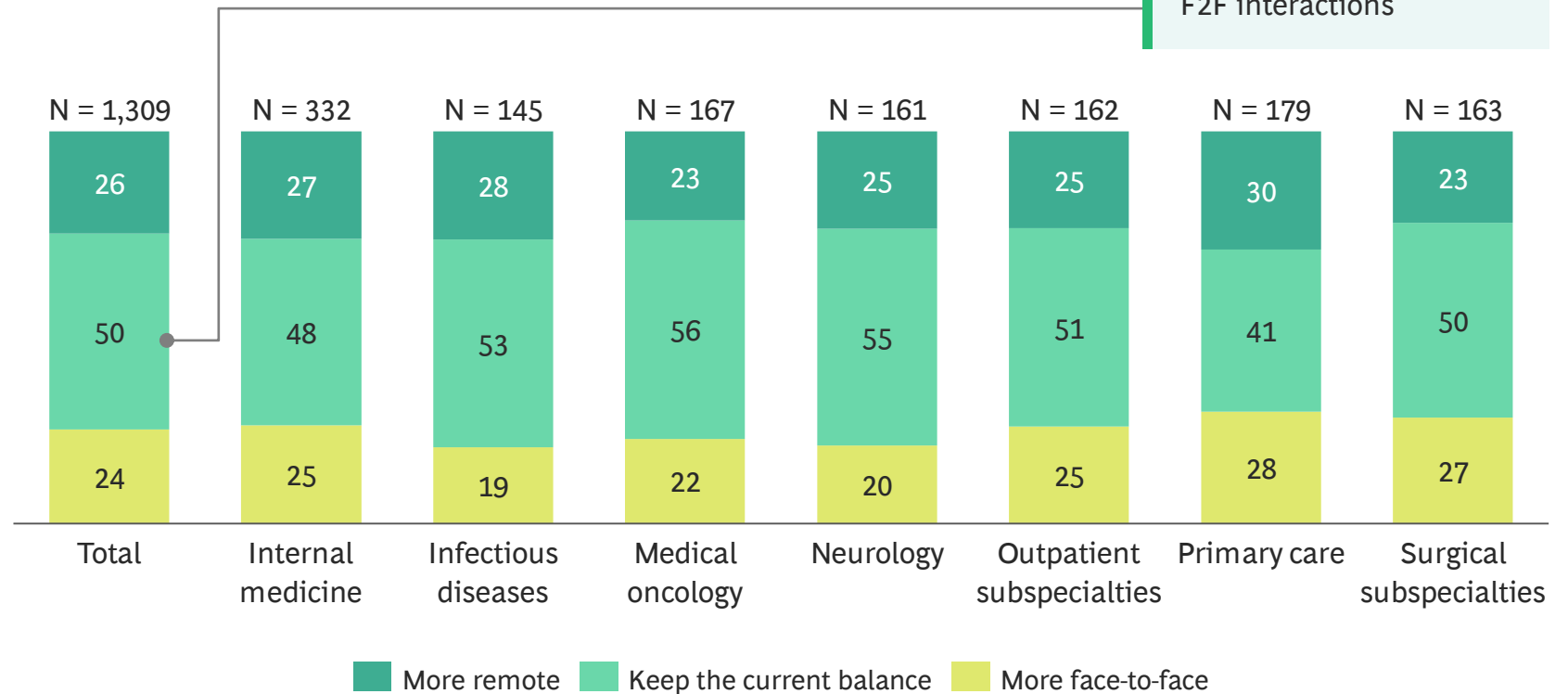
Question: Which of the following tools did you use to communicate with your patients? N = 1,309.

Most Doctors Want to Continue the Shift Toward Virtual Interactions with Pharma Companies Even After COVID-19

Interaction frequency
(number of monthly interactions, % of monthly interactions)



Post-COVID-19 preference for virtual interaction with pharma companies
(% of respondents)



~50% prefer to keep the current mix of virtual and F2F interactions

Sources: Physician COVID-19 Response Biopharma Survey, May 2020; BCG analysis.

Note: Not all sums total accurately because of rounding.

Question: Please list the monthly frequency and rank how effective you found each of these interactions. Post-COVID-19: How would you like your engagement model with pharma companies to evolve?

Physicians' Views on the Effectiveness of Virtual Engagement Are Rising with Experience from COVID-19

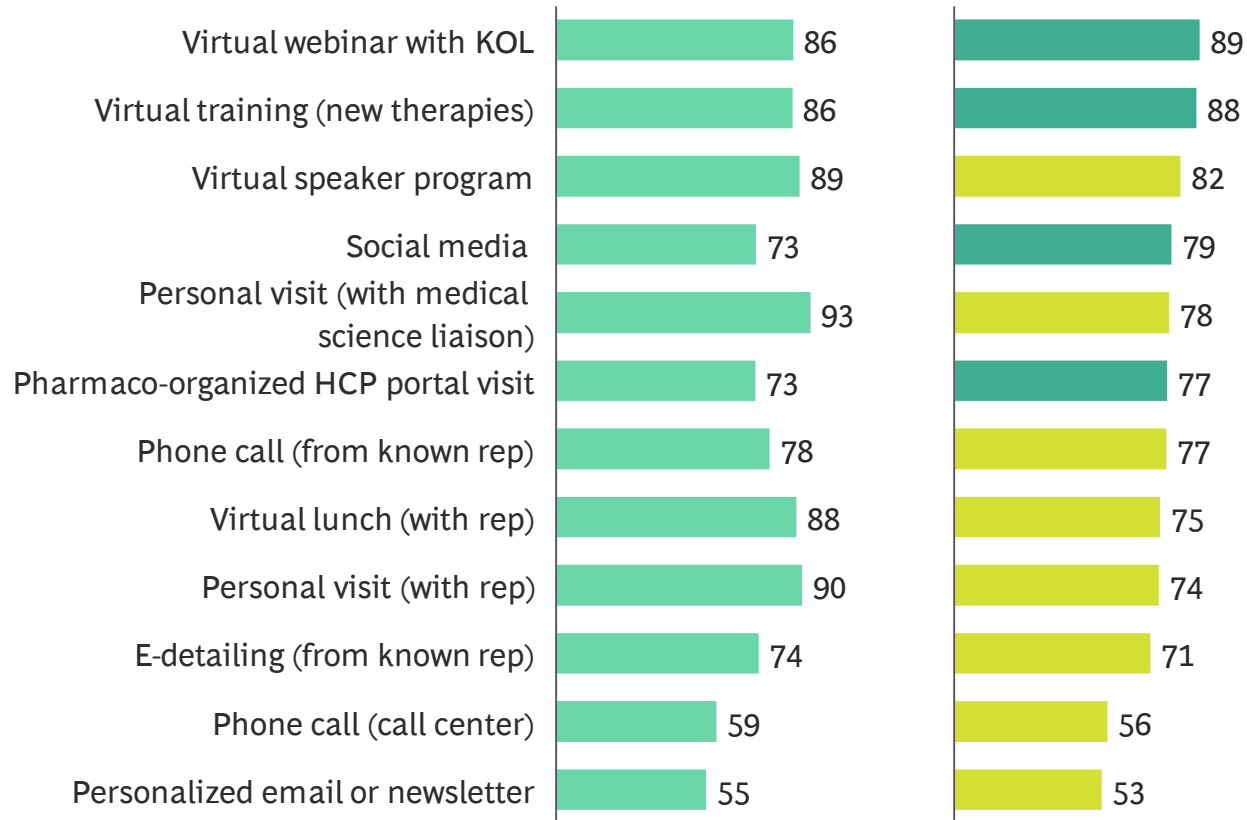
Interaction effectiveness

(% of respondents choosing effective or very effective)

Before COVID-19

During COVID-19 (May 2020)

Level of effectiveness



The four most effective channels are virtual

Even pre-COVID-19, virtual interactions already ranked at effectiveness levels similar to those of in-person visits

Sources: Physician COVID-19 Response Biopharma Survey, May 2020; BCG analysis.

Question: Please list the monthly frequency and rank how effective you found each of these interactions (excluding least effective, e-detailing [unknown rep], and mass email). Total N = 1,234, individual interaction type N > 30.

Even with a Vaccine, HCPs Expect Continuing Access Restrictions for Pharma Sales Reps

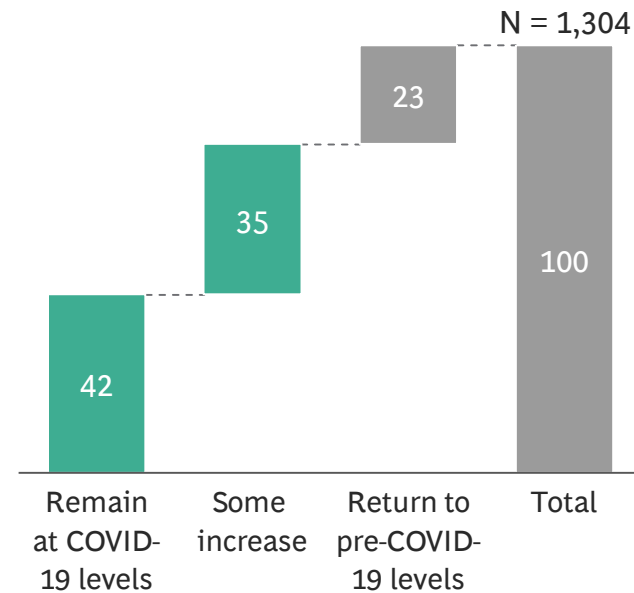
If a vaccine is available, **55%** expect a return to pre-COVID-19 access levels

That falls to **23%** if a vaccine is not available

In both scenarios, **~35%** expect some bounce-back but not a full return to pre-COVID-19 levels

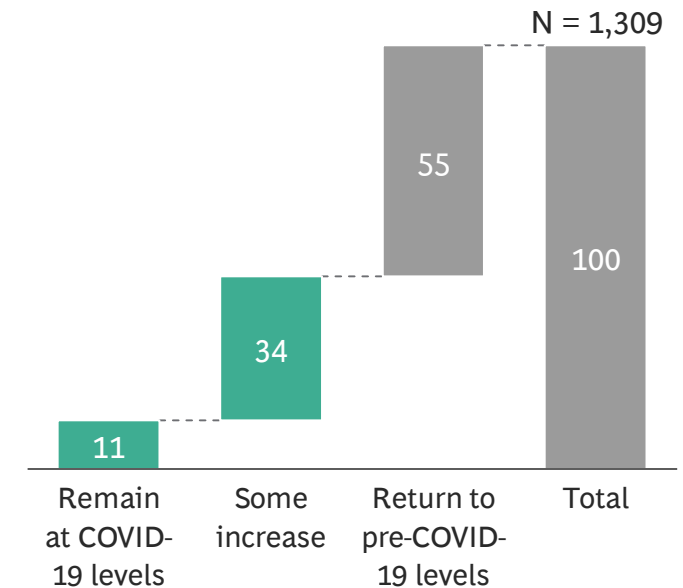
Without a vaccine in widespread use, almost 80% of MDs expect in-person interactions below pre-COVID-19 levels

Scenario 1: Future access for in-person interactions (% of respondents)



With a vaccine or treatment in widespread use, 45% of MDs still expect in-person interactions below pre-COVID-19 levels

Scenario 2: Future access for in-person interactions (% of respondents)



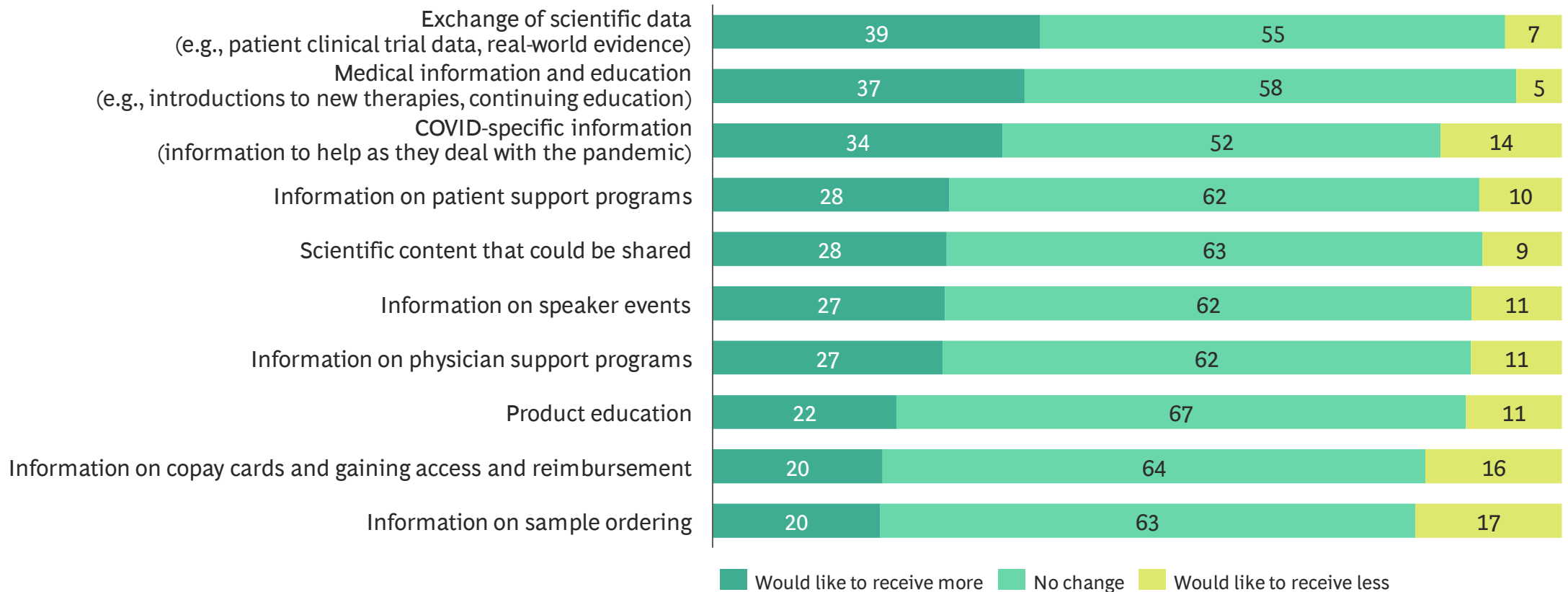
Sources: Physician COVID-19 Response Biopharma Survey, May 2020; BCG analysis.

Question: Select the approach your hospital or clinic will likely take to managing in-person interactions with sales representatives of pharmaceutical companies compared with the pre-COVID-19 approach.

Physicians' Content Preferences Are Changing with More Interest in Scientific Data and Medical Information and Education

Reported post-COVID-19 content preferences

(% of respondents, N = 1,309)

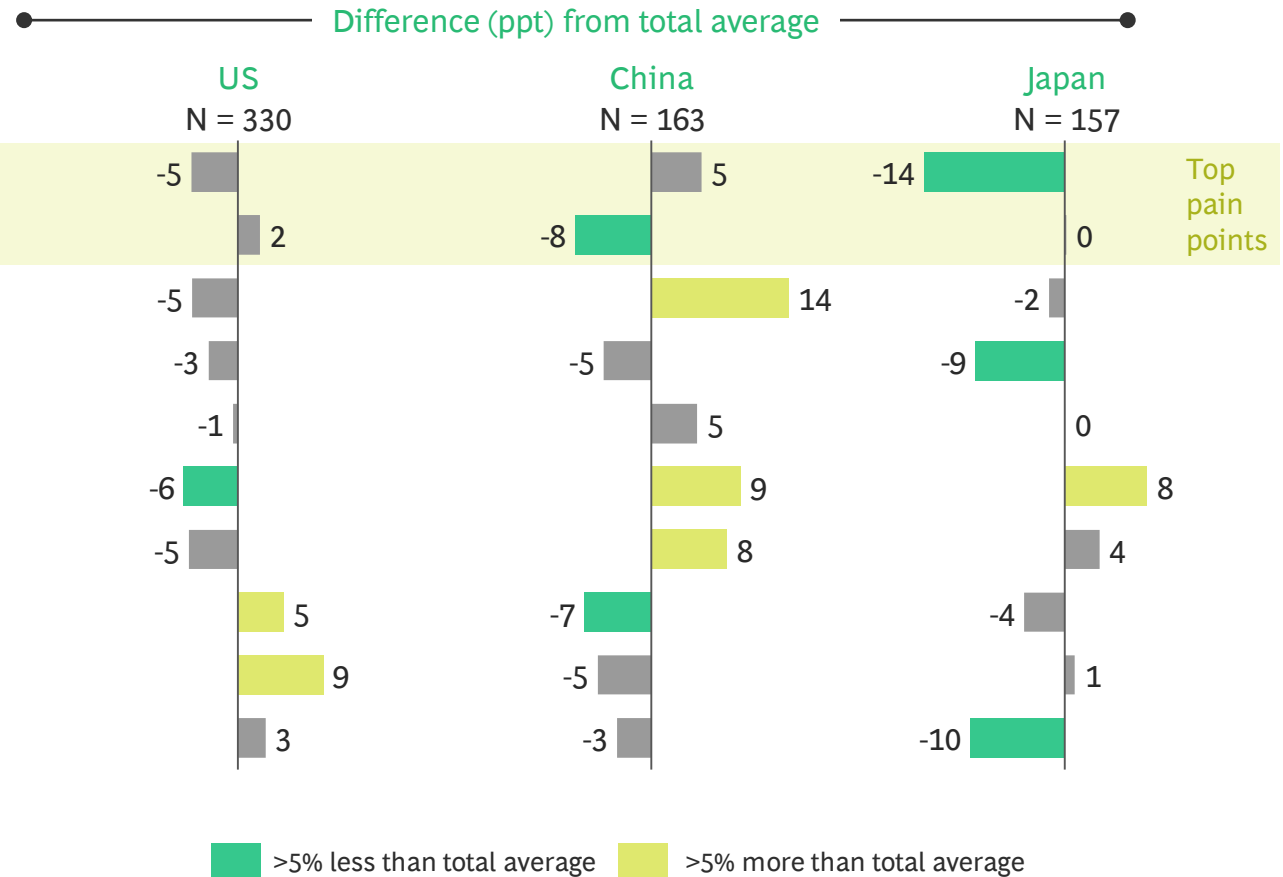


Sources: Physician COVID-19 Response Biopharma Survey, May 2020; BCG analysis.

Question: Post-COVID-19: Please consider which content you would like to receive more or less of from biopharma companies.

The Opportunities for Personalized Digital Communications Vary by Country (1 of 2)

Reported pain points with pharma digital communications
(% of responses)

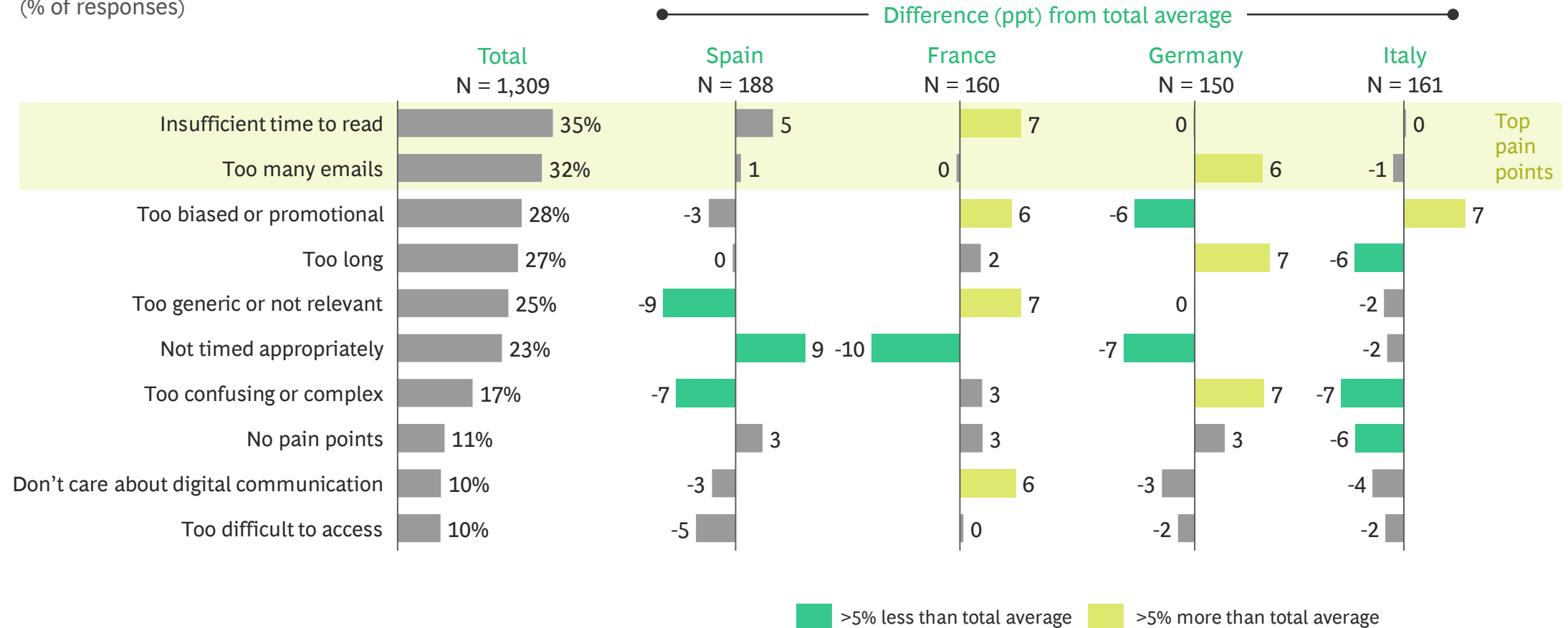


Sources: Physician COVID-19 Response Biopharma Survey, May 2020; BCG analysis.

Question: Which of the following pain points related to digital communication and digital interaction from pharmaceutical companies could be improved?

The Opportunities for Personalized Digital Communications Vary by Country (2 of 2)

Reported pain points with pharmaco digital communications
(% of responses)



Sources: Physician COVID-19 Response Biopharma Survey, May 2020; BCG analysis.

Question: Which of the following pain points related to digital communication and digital interaction from pharmaceutical companies could be improved?