

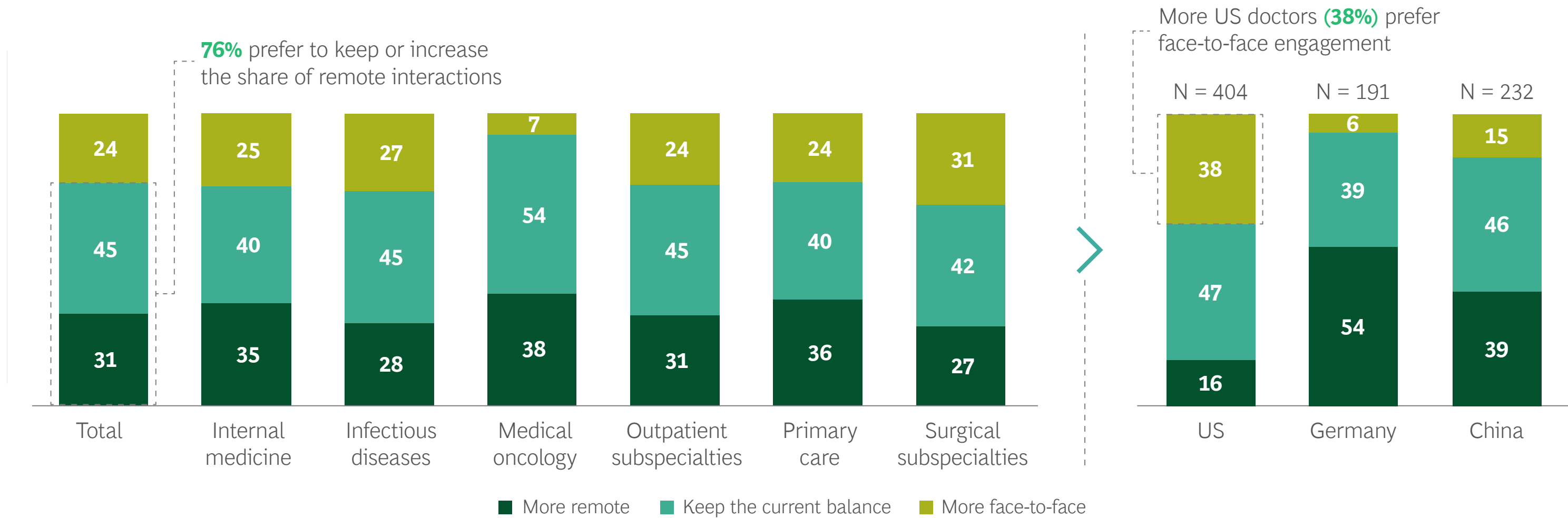
An abstract graphic on the left side of the slide. It features a dark grey background with a grid of thin white lines. Overlaid on this grid are numerous green circles of varying sizes, some solid and some hollow, connected by thin green lines. A large, curved band of small green squares and rectangles follows the top edge of the grid, creating a sense of a globe or a data arc.

# Doctors' Changing Expectations of Pharma Are Here to Stay

SEPTEMBER 2021

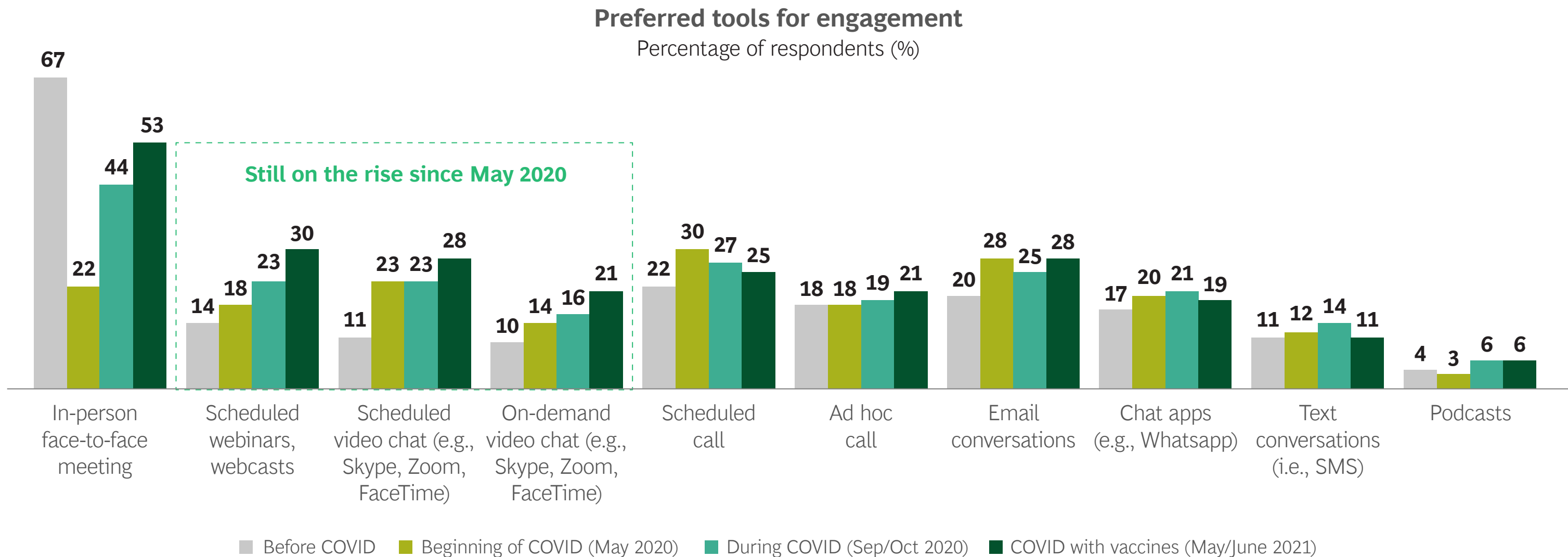
# Although results vary by market, most physicians overall prefer to keep or increase the share of virtual interactions with pharma companies

Thinking of post-COVID interaction preference with pharma companies  
Percentage of respondents (%)



Sources: Physician COVID-19 Response BioPharma Surveys, May 2020, September/October 2020, and May/June 2021; BCG analysis.  
Questions: Please list the monthly frequency and rank how effective you found each of these interactions. Thinking about your practice post-COVID: How would you like your engagement model with pharma companies to evolve?

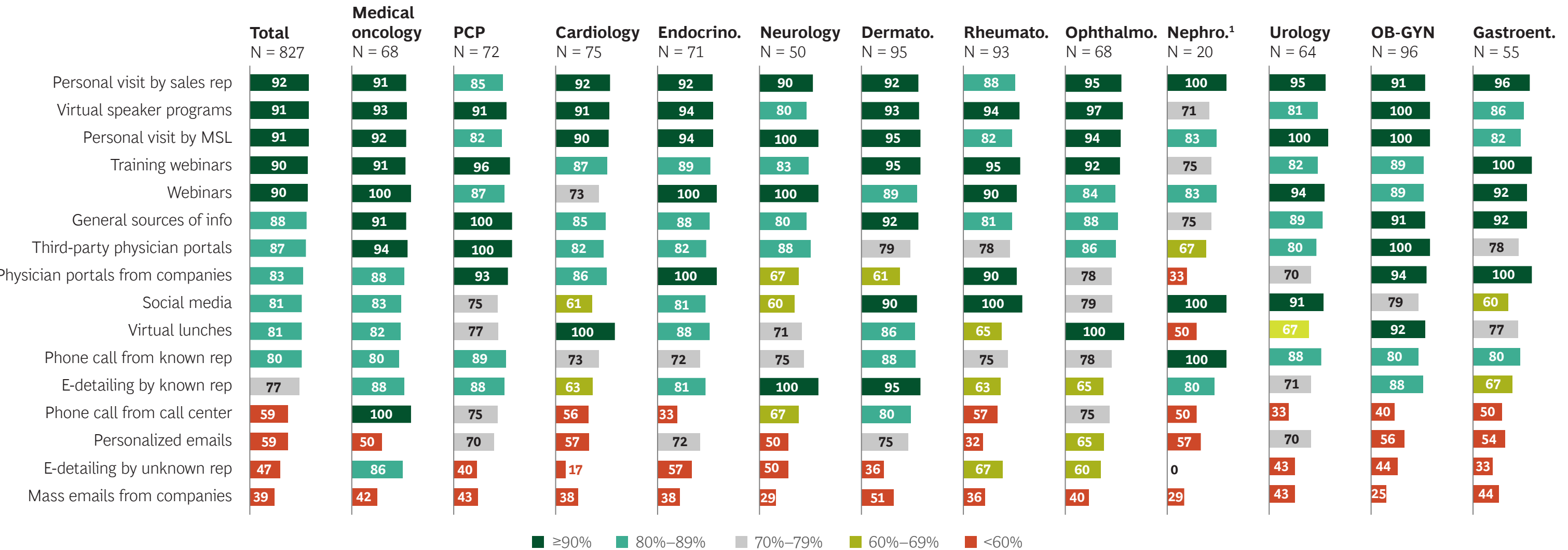
# Preference for virtual engagement has significantly increased over the course of the pandemic



Sources: Physician COVID-19 Response BioPharma Surveys, May 2020, September/October 2020, and May/June 2021; BCG analysis.  
Question: What [are/were] your preferred tools for one-on-one or small-group personal engagement with pharmaceutical companies [Before/beginning of COVID (May 2020), During COVID (September/October 2020), and now during COVID with vaccines (May/June 2021)]?  
Note: N=449 for May 2020 survey; N=591 for September/October 2020 survey; N=827 for May/June 2021 survey.

# Doctors' appetites for digital channels differ across specialties

**Communication channel effectiveness**  
When used, % of responses indicating channel as effective or very effective

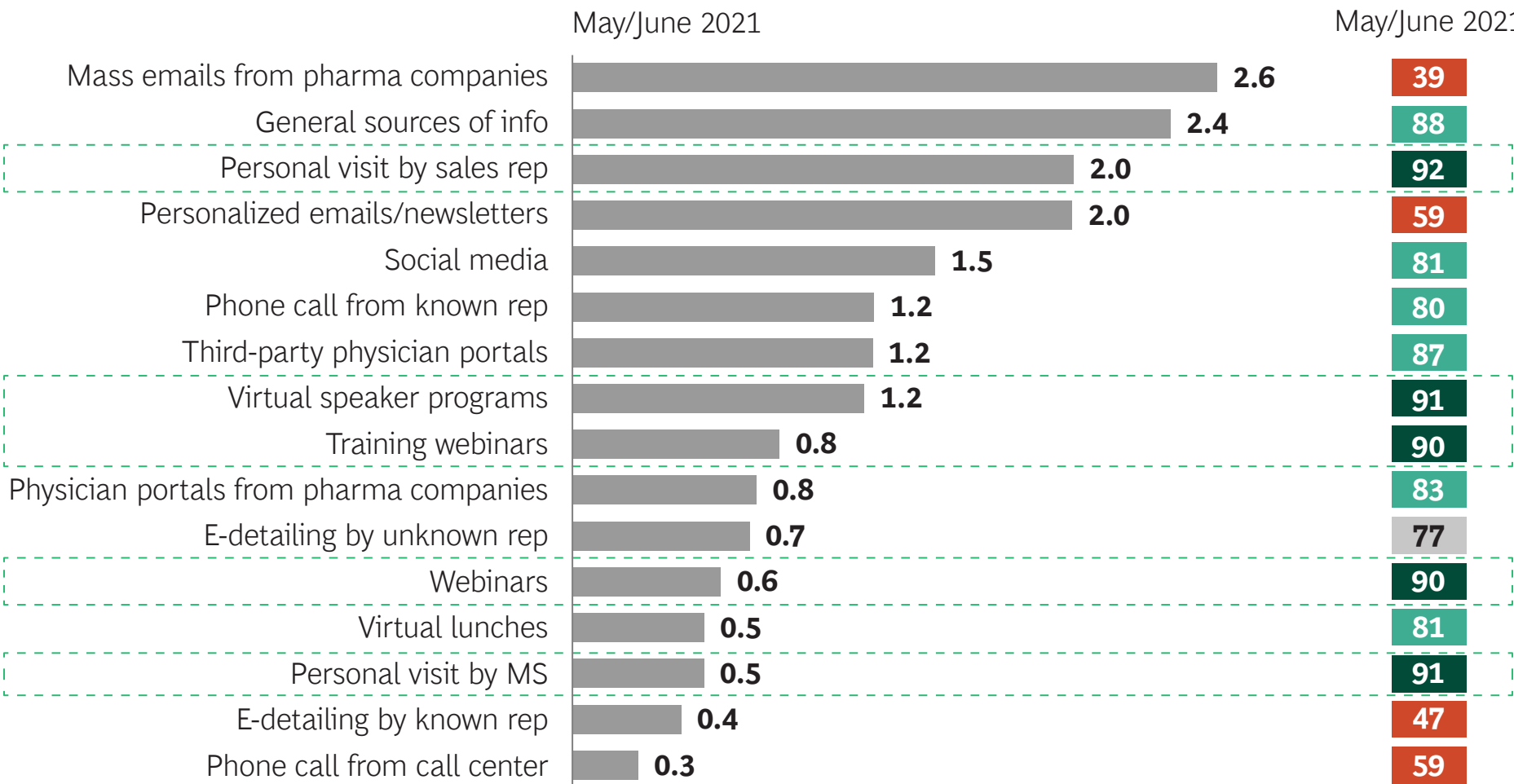


Sources: Physician COVID-19 Response BioPharma Survey, May/June 2021; BCG analysis.  
Question: (May/June 2021) Please list the monthly frequency and rank how effective you found each of these interactions. <sup>1</sup>Data available only for the US.

# Channels rich in content are considered effective by MDs, while interaction with medical and science personnel is underutilized

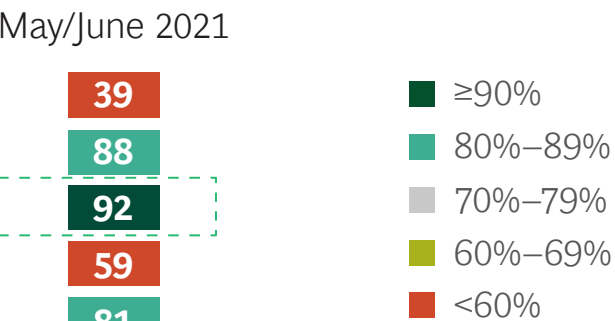
## Communication channel frequency

Average number of monthly interactions per MD



## Communication channel effectiveness

When used, % of responses indicating channel as effective or very effective

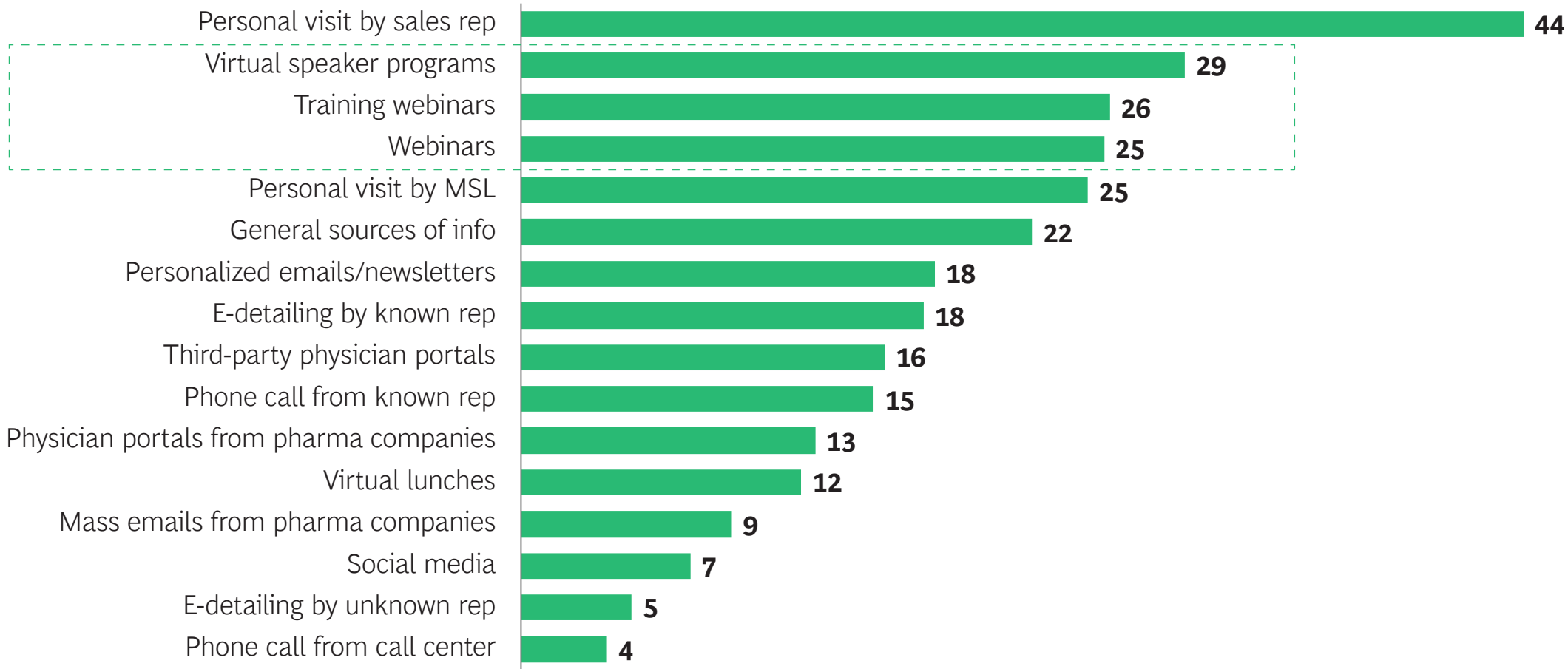


Sources: Physician COVID-19 Response BioPharma Survey, May/June 2021; BCG analysis.  
Question: (May/June 2021) Please list the monthly frequency and rank how effective you found each of these interactions.

# For new Rx products, personal visits are still the preferred channel, but three virtual channels occupy the top four

## Preferred engagement channel to learn about new Rx products

% of respondents



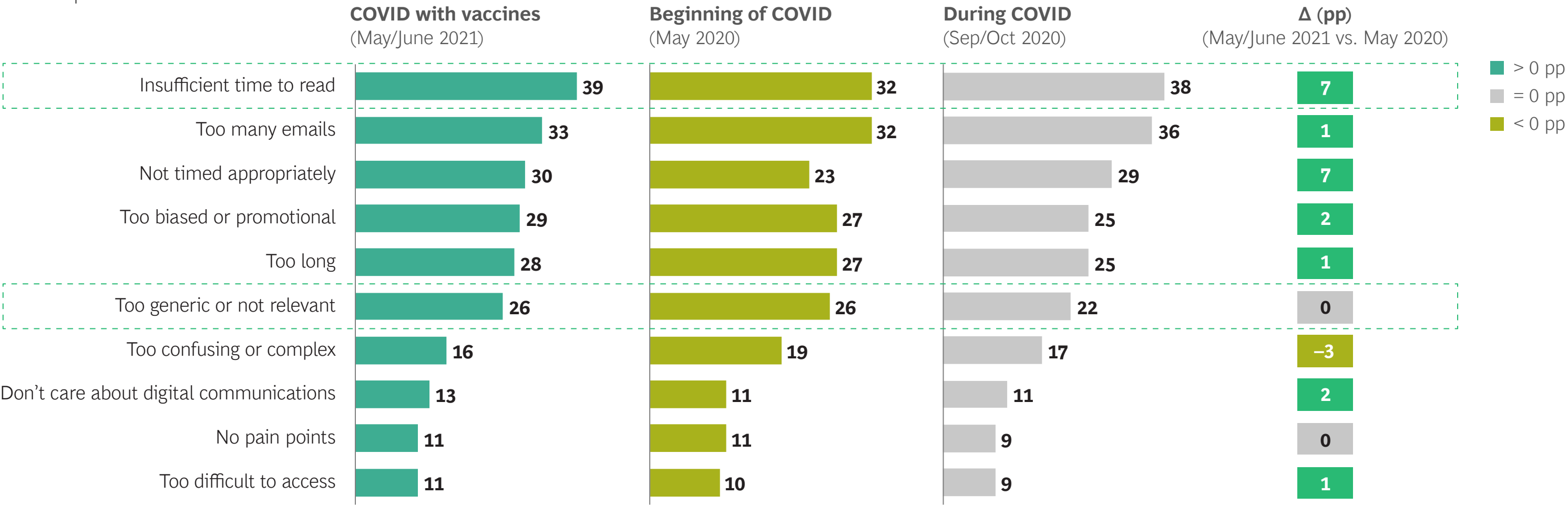
**63%**  
of HCPs prefer to learn about Rx products three months prior to launch

Sources: Physician COVID-19 Response BioPharma Survey, May/June 2021; BCG analysis.  
Questions: How do you prefer to learn about new Rx products on the market? When do you prefer to learn about new Rx products?  
Note: N=827.

# Mass emails and lack of personalization are the main digital communications pain points for physicians

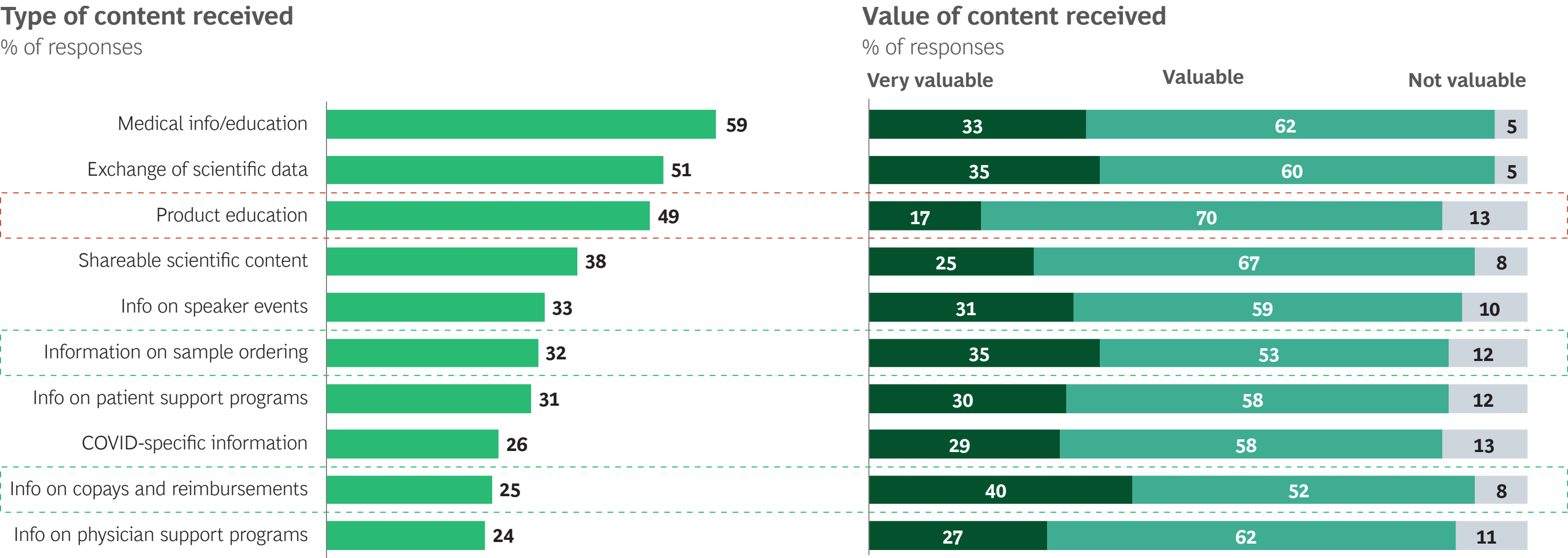
## Reported pain points with pharma company digital communications

% of responses



Sources: Physician COVID-19 Response BioPharma Surveys, May 2020, September/October 2020, and May/June 2021; BCG analysis.  
Question: Which of the following pain points related to digital communication and digital interaction from pharmaceutical companies could be improved?  
Note: N=449 for May 2020 survey; N=591 for September/October 2020 survey; N=827 for May/June 2021 survey; pp = percentage point(s).

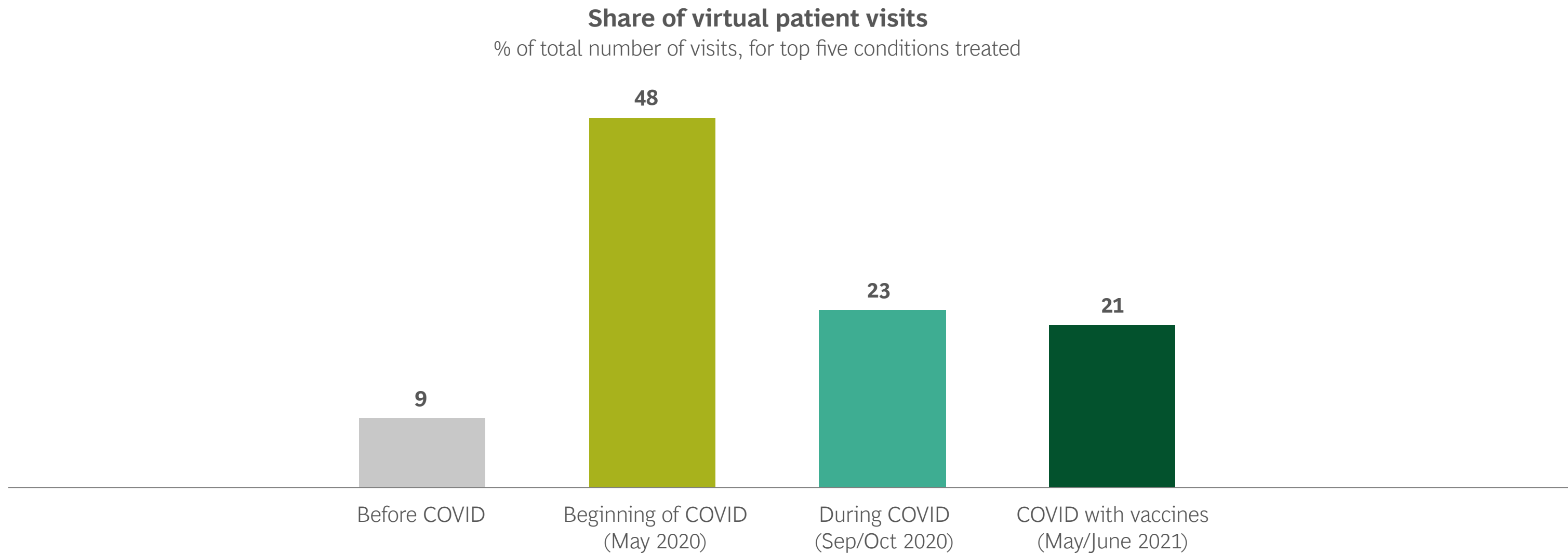
# There are big gaps between the perceived value of content and what doctors receive



Sources: Physician COVID-19 Response BioPharma Surveys, May 2020, September/October 2020, and May/June 2021; BCG analysis.  
Questions: (May/June 2021) What type of content did you receive from biopharma companies? Please rank how valuable you found the content you received from biopharma companies.  
Note: N=827.

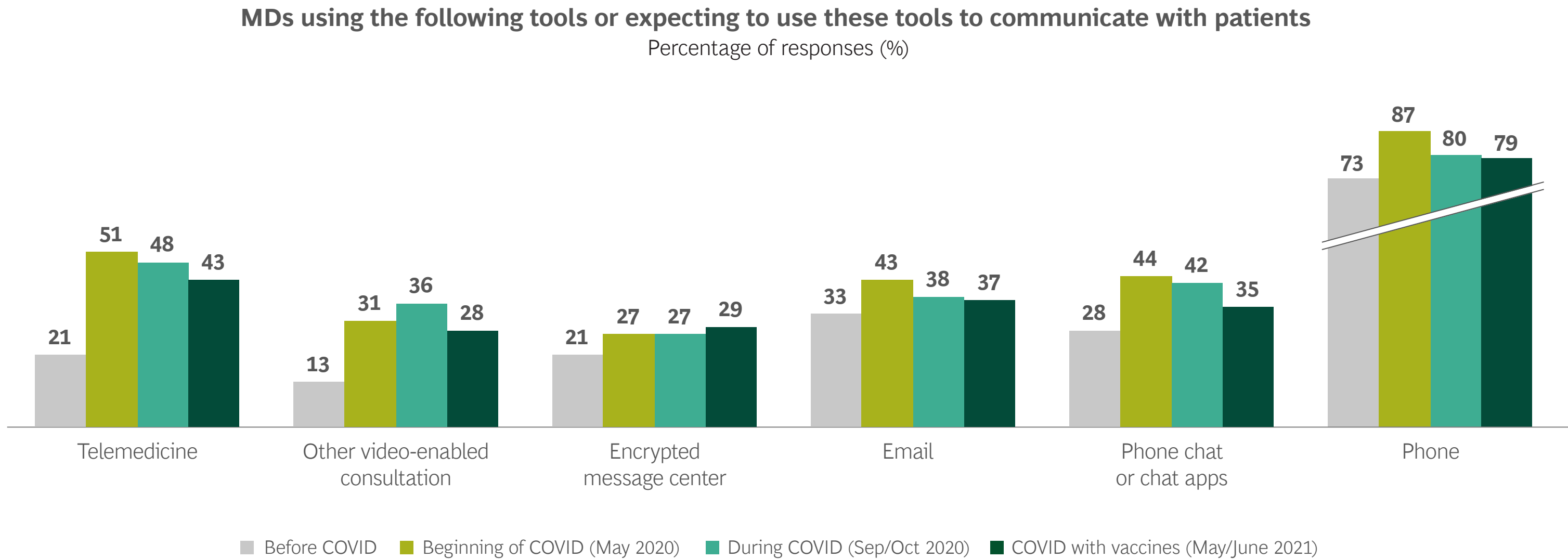


# The share of virtual patient interactions post-COVID is expected to be twice as high as pre-COVID levels



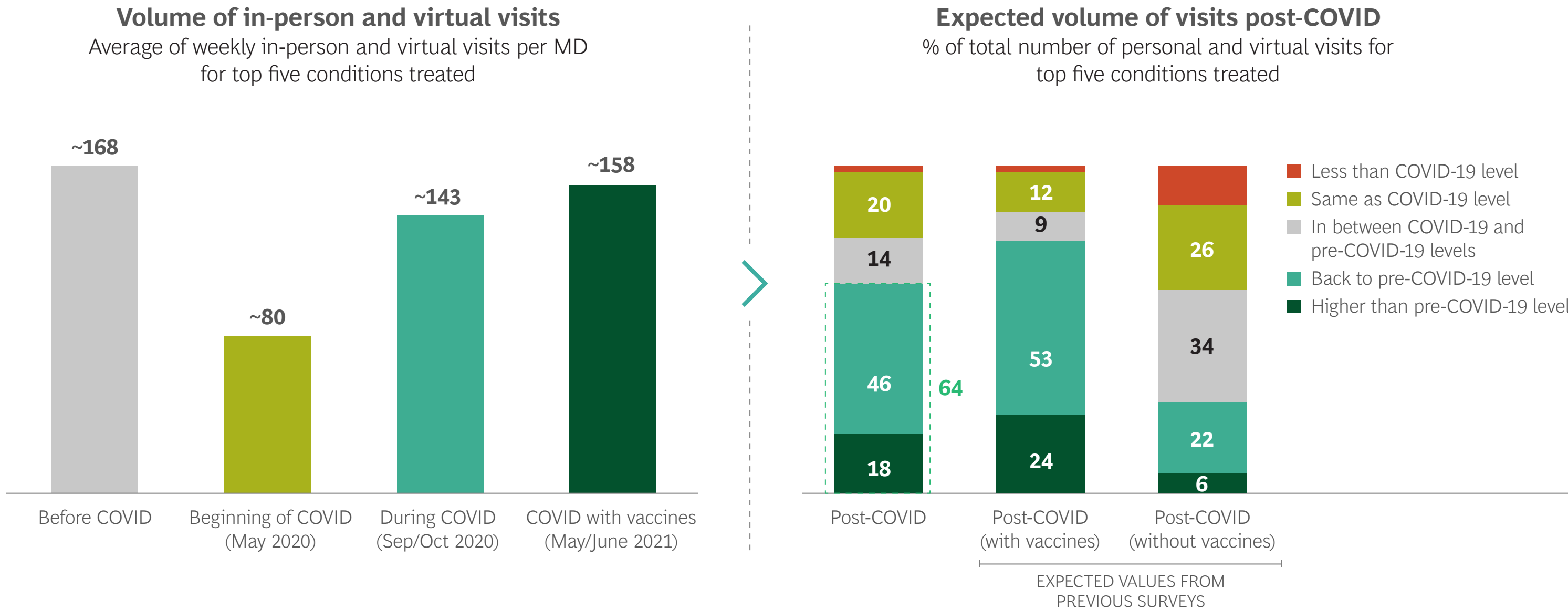
Sources: Physician COVID-19 Response BioPharma Surveys, May 2020, Sept/Oct 2020, and May/June 2021; BCG analysis.  
Questions: What % of assessments, diagnoses, and treatment decisions were made through in-person visits (in all settings) vs. through virtual visits? In this scenario, how would your use of virtual visits change compared with your current volume?

# The use of telemedicine and video-enabled tools has risen significantly from pre-COVID levels



Sources: Physician COVID-19 Response BioPharma Surveys, May 2020, September/October 2020, and May/June 2021; BCG analysis.  
Questions: Which of the following tools did you use to communicate with your patients? As COVID-19 resolves, which of the following tools do you plan to use to communicate with patients?

# Patient volume is back to pre-COVID levels—and higher than many MDs expected



Sources: Physician COVID-19 Response BioPharma Surveys, May 2020, September/October 2020, and May/June 2021; BCG analysis.  
Questions: What were the top five most common conditions you treated among your weekly patients, both in-person (in all settings) and virtual/remote? What is your current weekly patient volume, both in-person (in all settings) and virtual/remote? In this scenario, how much of a change would you expect in your weekly patient volume compared with your current volume?