

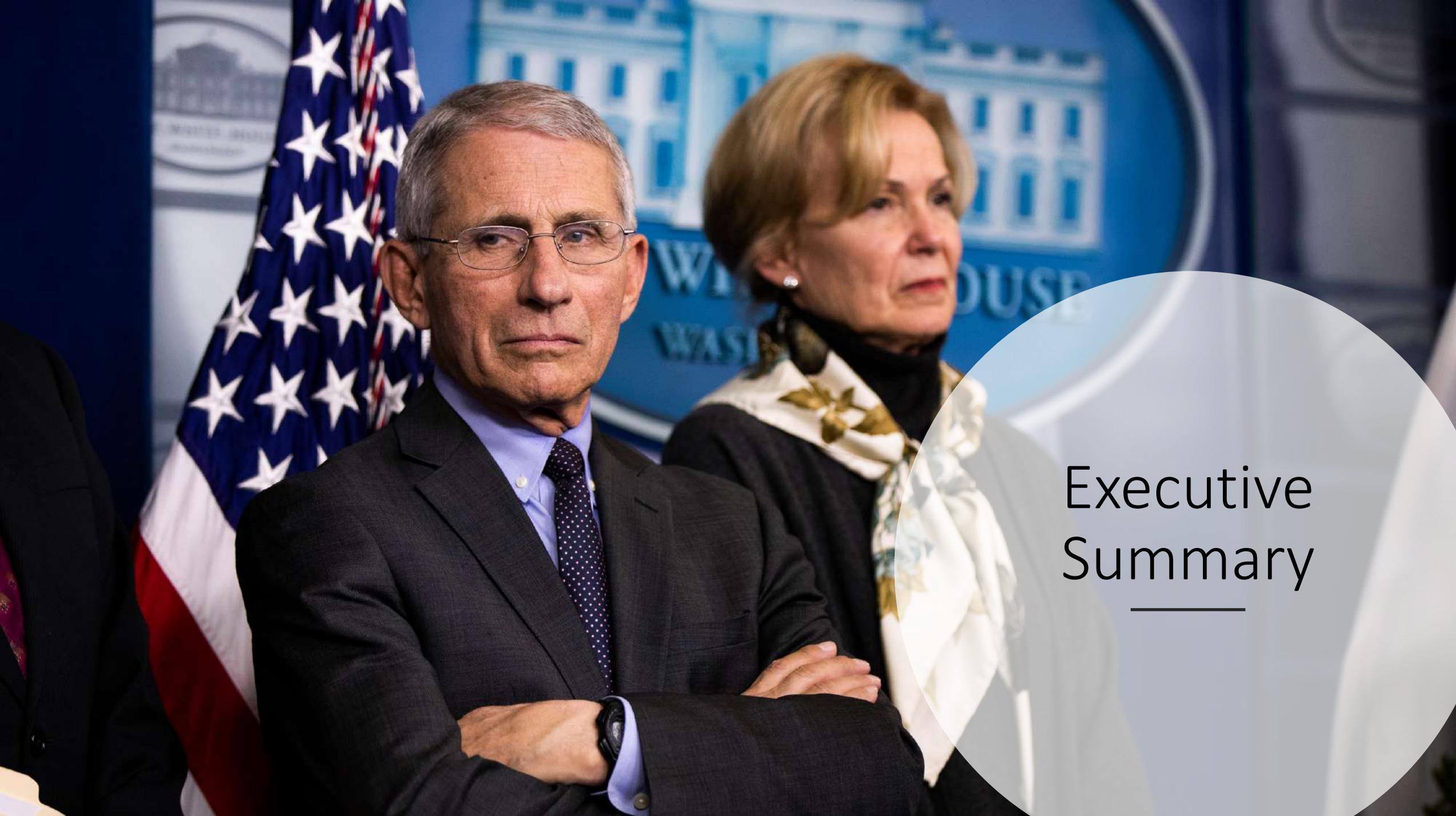
COVID-19 Impact on Patients' Existing Conditions and Treatment Behaviors



Agenda

- Executive Summary
- Methodology
- Who did we survey?
- How is COVID-19 impacting patient concerns about their existing health conditions?
- How is COVID-19 impacting patient treatment behaviors?
- What COVID-19 information sources are most helpful and what are patients' unmet needs?
- Telemedicine and RPM during COVID-19
- COVID-19 and Health Insurance





Executive Summary

1

Most people living with a chronic condition are actually living with **multiple chronic conditions** (69%). And, 72% of them are treating their conditions with at least one prescription medication (1/3 treating with 3+ Rx meds). Add the COVID-19 pandemic to the mix, and one sees how complicated, confusing and frightening life has become for this population (and remember, this population makes up **62% of American adults**, with 42% of them living with 3 or more conditions).

2

The daily lockdown and stay-at-home reality of COVID-19 is causing additional and concerning health-related impacts on this population, including **difficulty sleeping, increased anxiety, increased stress, insufficient exercise and unhealthy eating**. These are **increasing patients' challenges** in coping with their existing conditions.

- **Opportunity for healthcare companies:** Provide new content including **advice and resources** to help patients better **cope with their current conditions**, given these new COVID-driven health challenges.

3

COVID-19 appears to be bringing **mortality, vulnerability and the critical importance of maintaining health** into more prominent focus for many patients.

- **Opportunity for healthcare companies** This represents a unique moment in time when patients may be **particularly receptive to initiatives driving behavior-change**, including getting diagnosed, finding the right treatment and adopting more effective health behaviors overall.

4

COVID-19 is dramatically shifting the way patients feel **emotionally** about living with their **existing health condition**, with many now feeling much more despairing, anxious and afraid about their condition than they did before.

- **Opportunity for healthcare companies:** Evaluate patient communications to ensure they recognize that patients' emotional mindset regarding their condition has changed due to the pandemic. Are you speaking to them in the right tone for where their mindset is today?

5

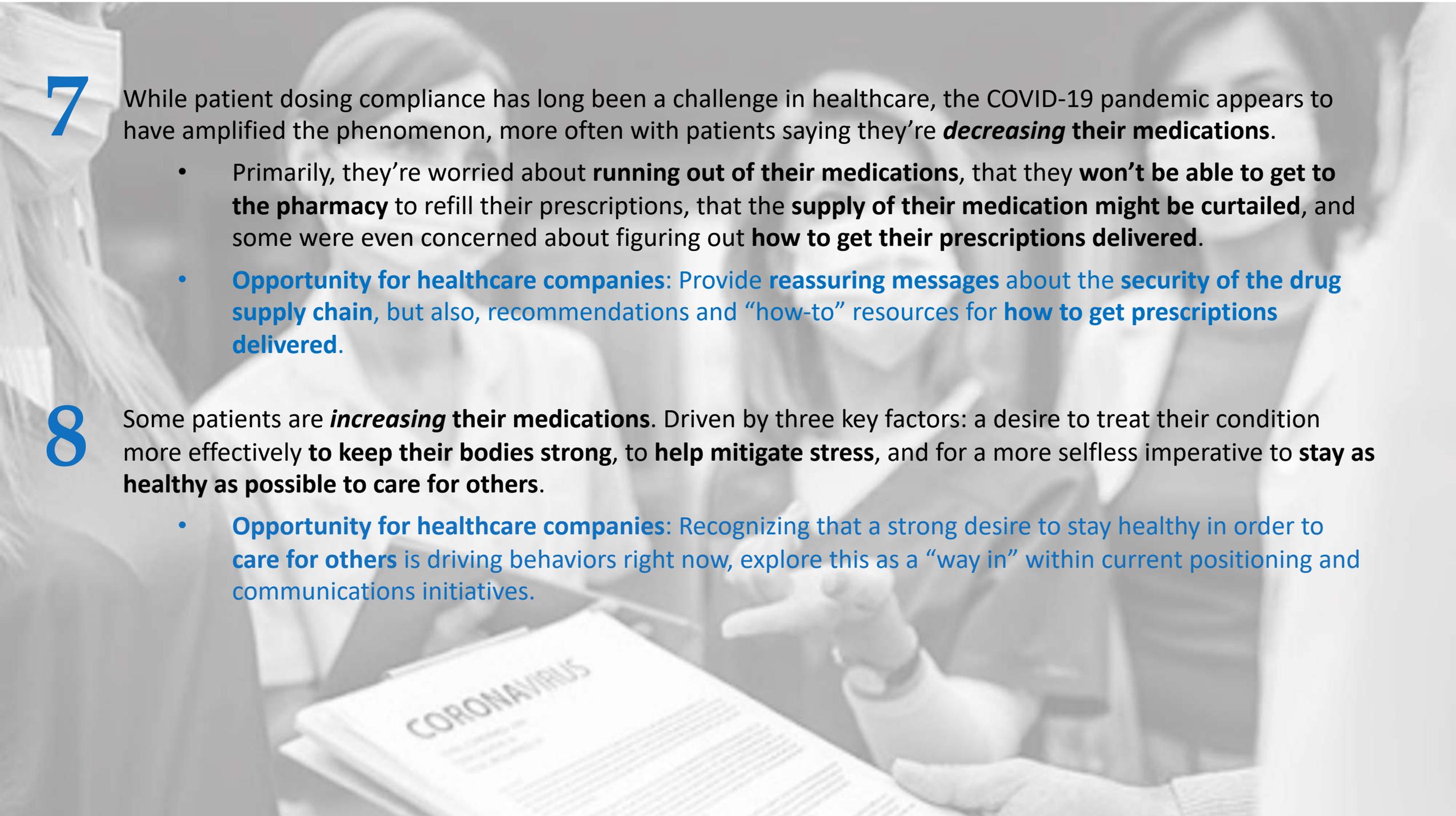
COVID-19 has significantly increased people's level of concern about their current conditions, predominantly driven by a belief that their condition **will make them more vulnerable** to contracting and succumbing to COVID-19, but also due to **restricted HCP access, isolation, and inhibited diet and exercise**.

- **Opportunity for healthcare companies:** Provide **education on patients' level of risk**, and content for **support resources to help manage stress and create health-promoting routines during lockdown**.

6

A significant contributor of patient concerns appears to be rooted in most patients admitting to **not being very knowledgeable** about COVID-19's impact on their **current chronic conditions**.

- **Opportunity for healthcare companies:** Help your patients sort through the (often conflicting and confusing) deluge of news and information, providing **clarification to patients around the level of risk COVID-19 poses to them**, based on their specific health conditions and/or treatments.



7

While patient dosing compliance has long been a challenge in healthcare, the COVID-19 pandemic appears to have amplified the phenomenon, more often with patients saying they're **decreasing their medications**.

- Primarily, they're worried about **running out of their medications**, that they **won't be able to get to the pharmacy** to refill their prescriptions, that the **supply of their medication might be curtailed**, and some were even concerned about figuring out **how to get their prescriptions delivered**.
- **Opportunity for healthcare companies:** Provide **reassuring messages** about the **security of the drug supply chain**, but also, recommendations and "how-to" resources for **how to get prescriptions delivered**.

8

Some patients are **increasing their medications**. Driven by three key factors: a desire to treat their condition more effectively **to keep their bodies strong**, to **help mitigate stress**, and for a more selfless imperative to **stay as healthy as possible to care for others**.

- **Opportunity for healthcare companies:** Recognizing that a strong desire to stay healthy in order to **care for others** is driving behaviors right now, explore this as a "way in" within current positioning and communications initiatives.

9

What's particularly alarming about these shifts in prescription dosing, is that patients are largely **going rogue** – nearly half of patients making changes to their medication regimen are **not consulting an HCP**.

- **Opportunity for healthcare companies:** Patients need to be reminded of **the dangers of changing dosing without the supervision of an HCP** – that **increasing dosing doesn't equate to better treatment** of their condition. Perhaps communication of the need to take their medication as prescribed should be **connected to the need to stay strong in order to be able to care for others** during this unprecedented time.

10

This population has **a lot of questions about the impact of COVID-19 on their existing conditions**. And they're not usually using the best sources to answer those questions - **the least used sources are rated as being the most helpful**.

- Pharma company sites/communications get **high marks for being helpful** BUT only a few are going to the website of the pharma company that makes their prescription to seek out answers.
- Many are **hungry for even more COVID-related information and resources**.
- **Opportunities for healthcare companies:** Include information about how COVID-19 is impacting people with specific conditions, and then raise awareness of its availability. Also, provide a clearer understanding of patients' own **personal COVID-19 risk** based on their current health conditions, current treatments and other personal factors (e.g. create a **COVID-19 personal risk calculator tool**); also provide **medication comparisons in terms of risks vs. benefits in the context of COVID-19**; also advice about **how to best manage patients' conditions during the pandemic**, and **reassurance about medication availability, financial support resources and information about telemedicine** and how it works.

11 During the pandemic, a **significant portion of these patients experienced a telemedicine visit** with their HCP, many for the first time, and across all condition areas.

- The majority **had a positive experience**.
- Like a number of behavior changes people have experienced during the pandemic, **telemedicine visits are likely to be added to the ways in which patients engage** with the healthcare system post pandemic.
- **Opportunity for payers, providers and for healthcare companies:** All need to consider the implications of this on their current engagement strategies and marketing activities among chronic condition populations; understand that we're in a unique situation in time that has driven telemedicine trials, but that work likely has to be done to fully incorporate it into HCP and patient routines.

12 Only **half of these patients** are aware that **payers have expanded enrollee benefits** due to COVID-19.

- Interestingly, patients are **more aware** of the **least expensive expanded benefits** (COVID-19 testing and telemedicine visits), than they are about **no cost benefits** for COVID-19 treatment and quarantined hospitalizations.
- **Opportunity for payers:** Besides the obvious humanitarian reasons, our data shows that disseminating this information is an opportunity for payers to drive positive enrollee perceptions.

Methodology



WHAT

Quantitative research study conducted by
Galileo Research and ⁺Wunderman Thompson Health



WHO

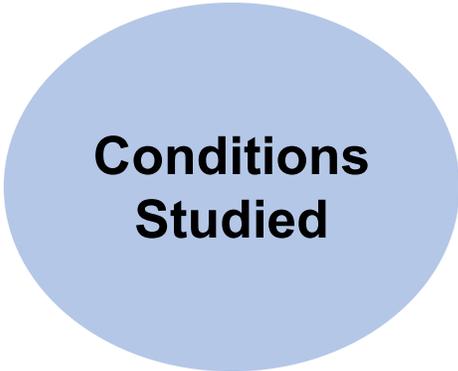
n=1,600 (*statistical tolerance = +/- 2.0 percentage points @ 90% confidence*)
US adults, age 18+ living with a chronic health condition



WHEN

Data collected April 17 – April 20, 2020

Methodology



Conditions Studied

Mental Health

Anxiety
Depression

Cardiovascular (CV)

Atrial Fibrillation
Heart Disease
High Cholesterol
Hypertension

Lung Health

Asthma
COPD

Central Nervous System (CNS)

Epilepsy
Migraine
Multiple Sclerosis

Pain

Chronic Pain (incl. Nerve Pain)
Osteoarthritis

Autoimmune/Inflammatory

Atopic Dermatitis
Crohn's Disease
Psoriasis
Psoriatic Arthritis
Rheumatoid Arthritis
Ulcerative Colitis

Diabetes

Type 1 Diabetes
Type 2 Diabetes

Obesity

Female Health

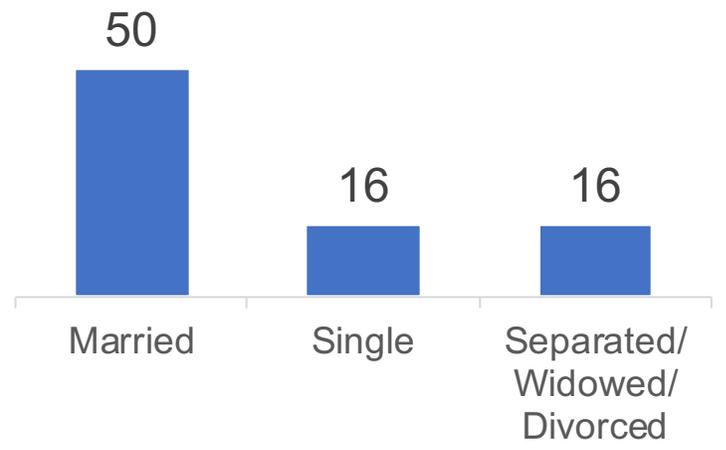
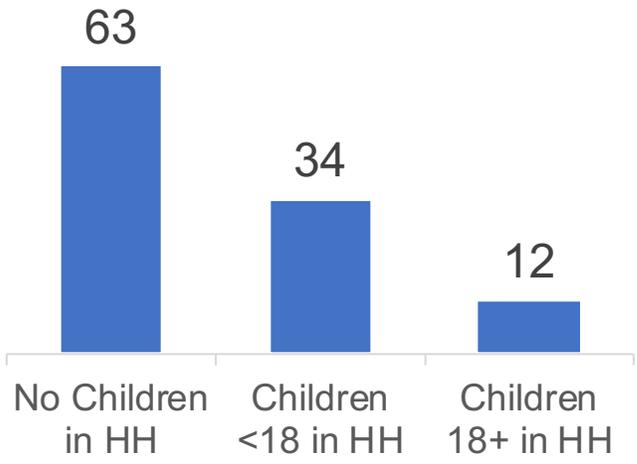
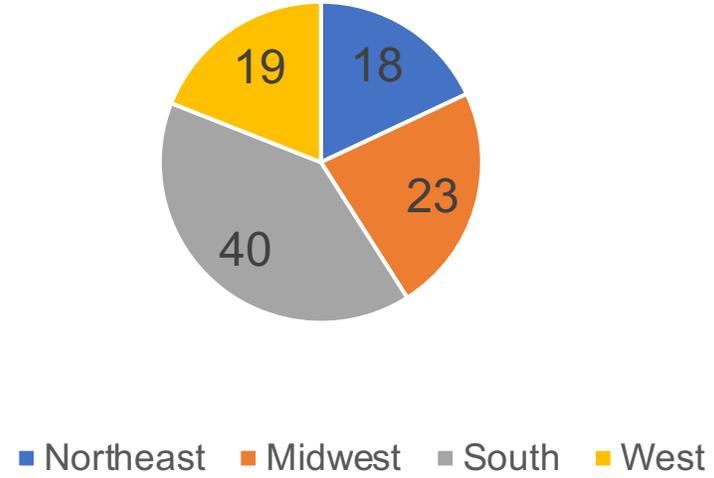
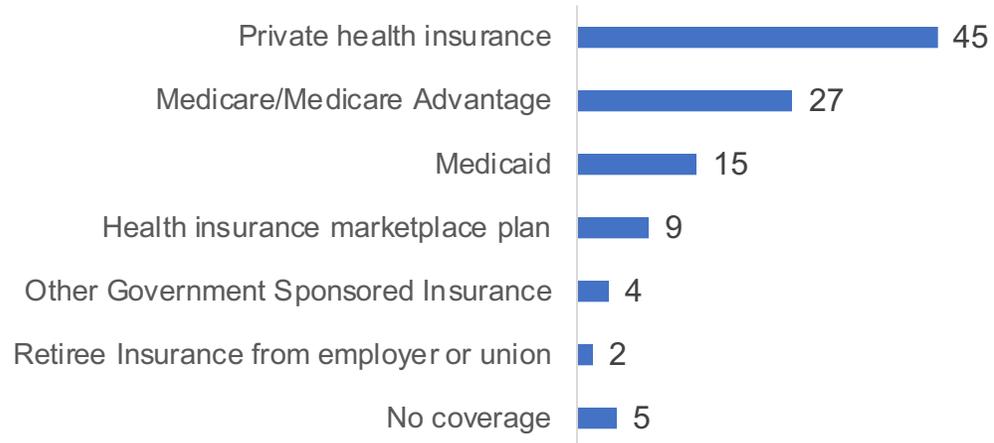
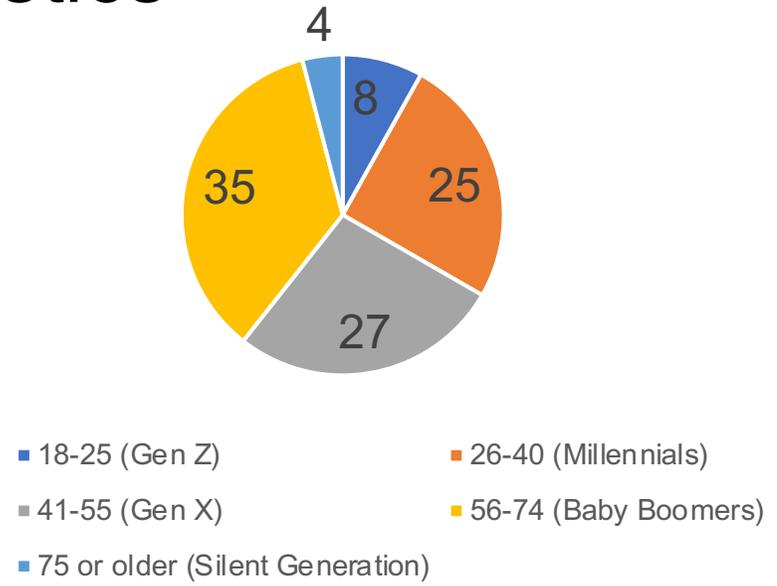
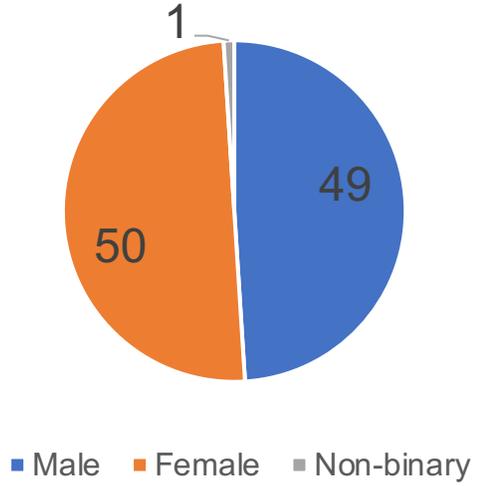
Menopausal Symptoms
Endometriosis
Uterine Fibroids

Conditions in **blue** have sufficient sample sizes to be further analyzed

Who did
we survey?



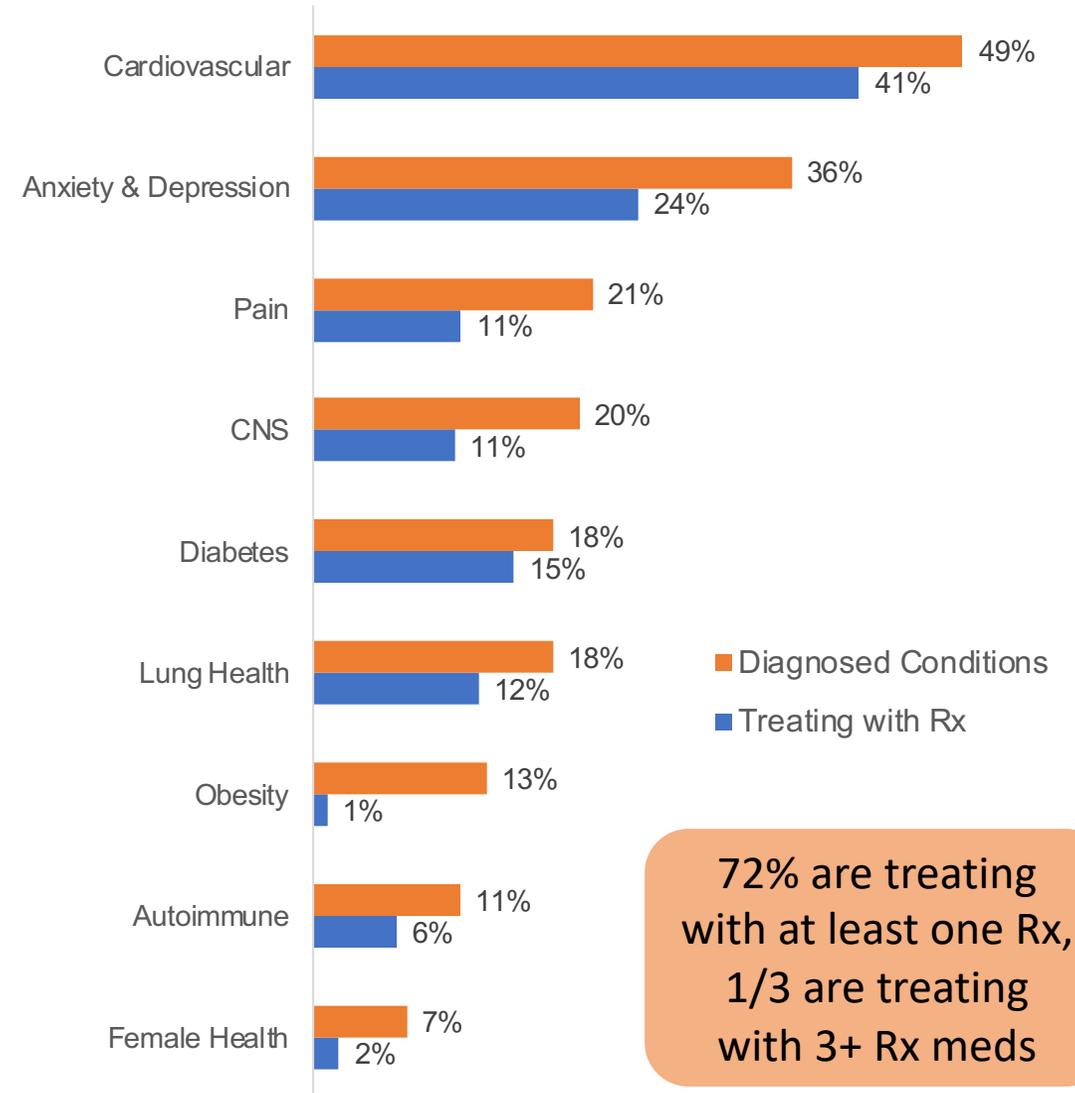
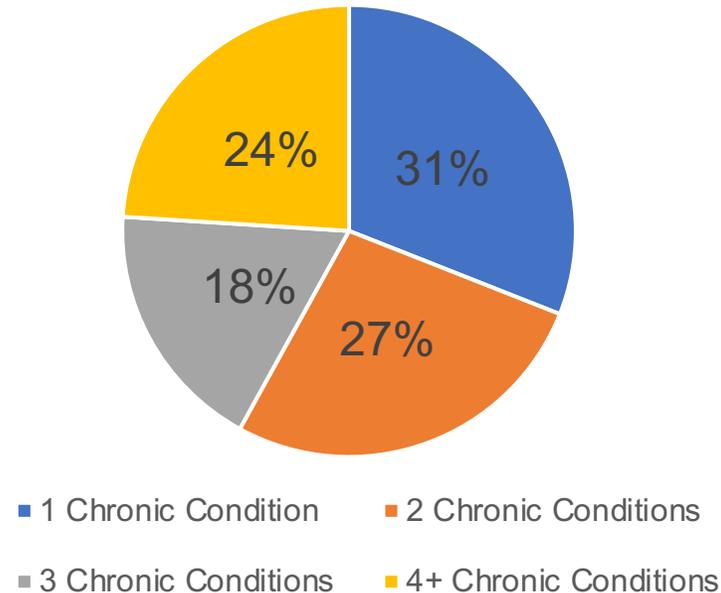
Sample Characteristics



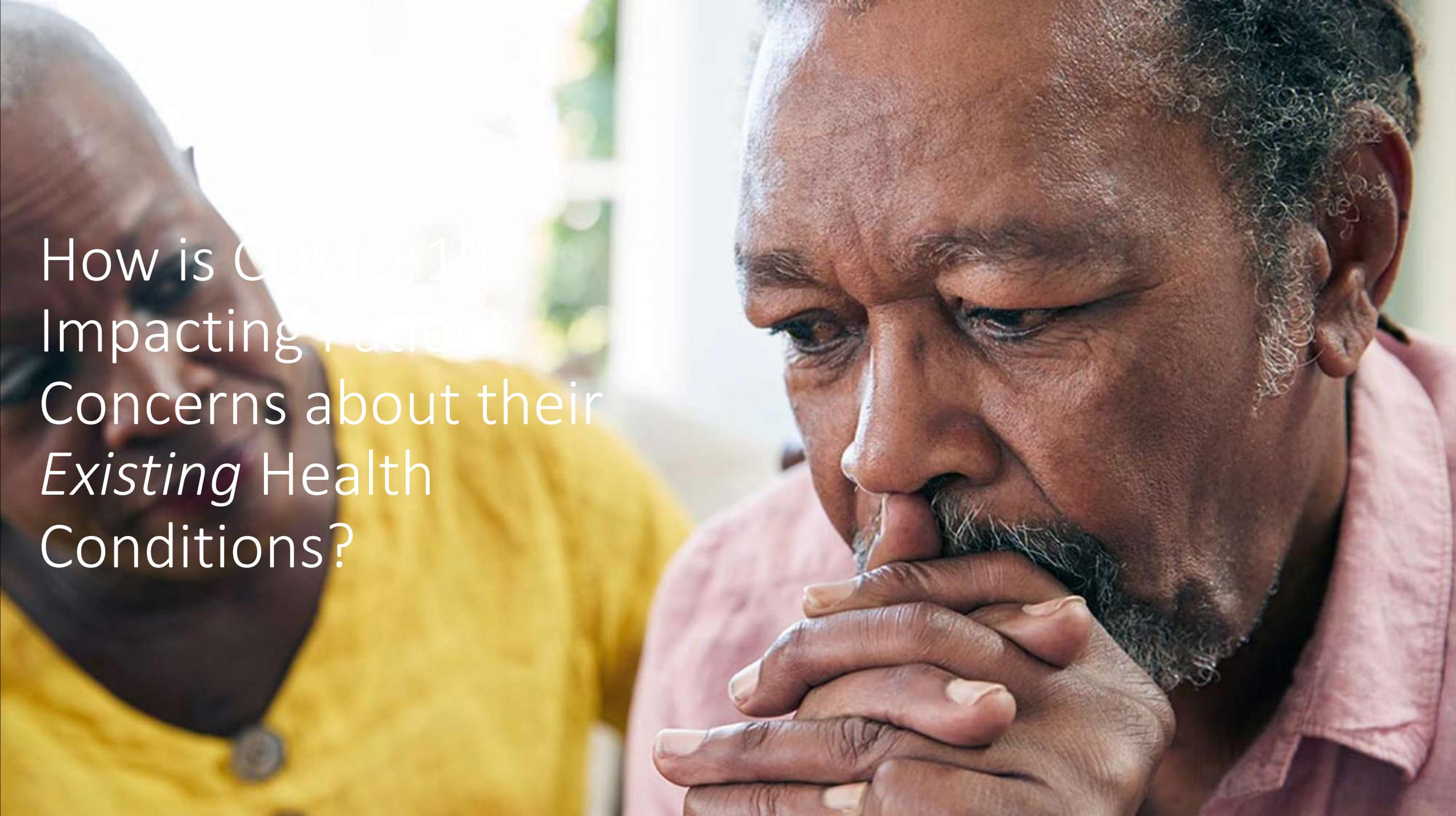
Over two thirds are managing multiple chronic conditions in addition to the burden of the COVID-19 pandemic

When we as healthcare marketers think about people living with a chronic health condition, we tend to think about them pretty narrowly, defining them by their chronic condition. So it's always sobering to be reminded that most people living with a chronic condition (69%) are actually living with *multiple chronic conditions*.

And, 80% of them are treating their conditions with at least one (usually more) prescription medication. Add the COVID-19 pandemic to the mix, and one can begin to imagine how complicated, confusing and frightening life can become.



72% are treating with at least one Rx, 1/3 are treating with 3+ Rx meds



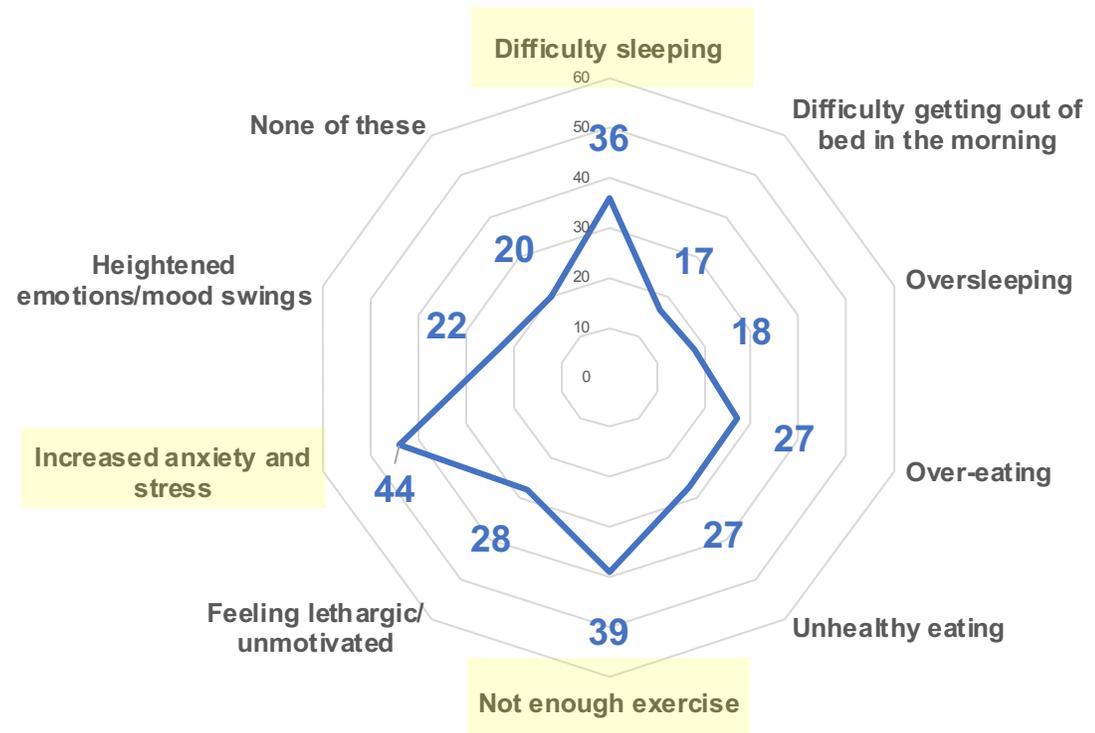
How is COVID-19
Impacting Patients?
Concerns about their
Existing Health
Conditions?

Across conditions, a majority of patients (80%) are experiencing multiple impacts, particularly increased anxiety and stress, frustration with lack of exercise and difficulty sleeping

Beyond the obvious daily life impacts of lockdowns and quarantines, COVID-19 is also having a number of health-related impacts on this population, especially so for those who have chronic conditions that are being reported to make them more vulnerable to COVID-19.

Nearly all of these chronic patients are suffering from **difficulty sleeping, frustration with lack of exercise and increased anxiety and stress** – these physical and emotional impacts are making coping with their existing health conditions even tougher.

Overall Impacts on Daily Life from COVID-19



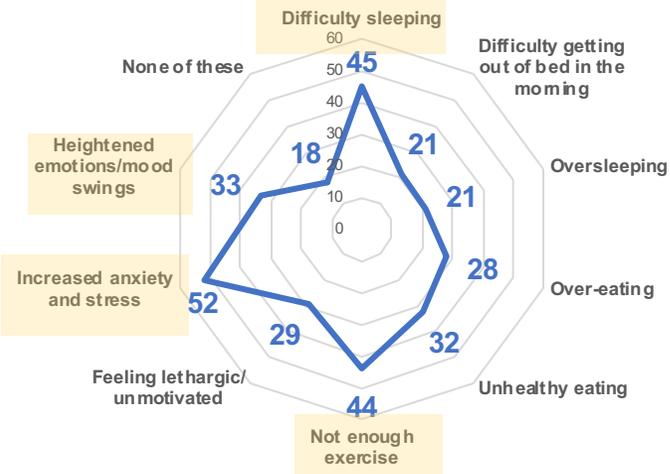
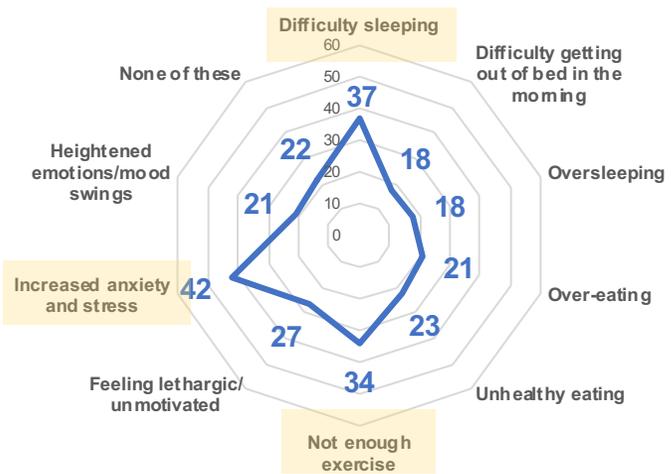
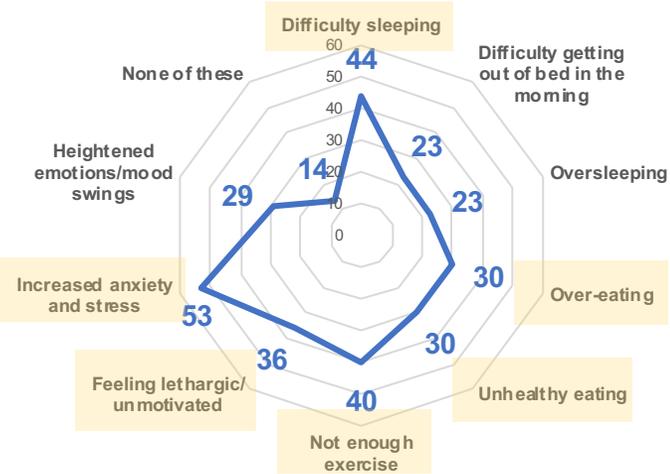
People living with anxiety and depression as well as female health conditions are feeling the greatest impact of COVID-19

Overall Impacts on Daily Life from COVID-19

Anxiety & Depression

Lung Health

Female Health

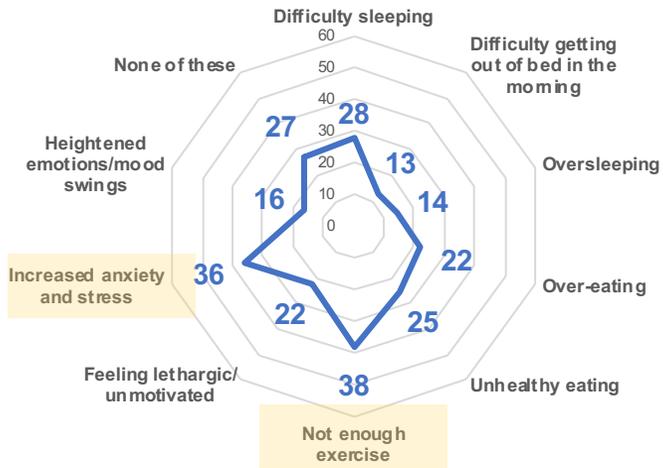


It makes intuitive sense that people struggling with anxiety and depression are feeling particularly impacted, exacerbating their existing symptoms; it also makes sense for people dealing with lung health issues who are concerned about their increased COVID vulnerability; similarly for the female health target, which is particularly comprised of women coping with menopause and are already dealing with sleep disruption and emotional impacts – explaining the high level of COVID impact.

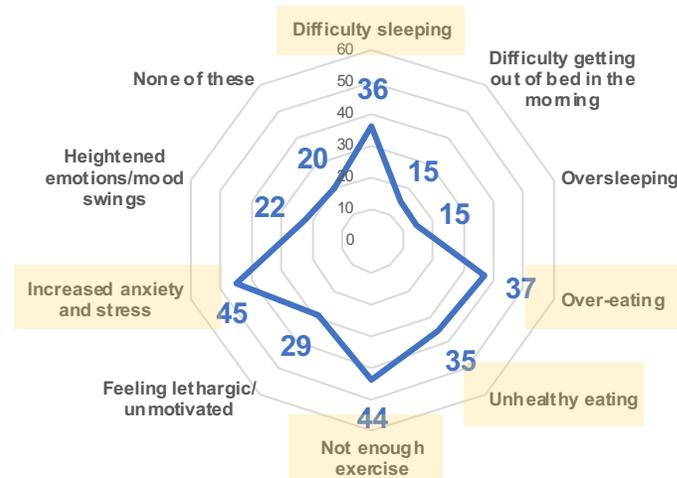
Those with type 2 diabetes, obesity and cardiovascular issues are feeling the impact of lack of exercise, even more than difficulty sleeping

Overall Impacts on Daily Life from COVID-19

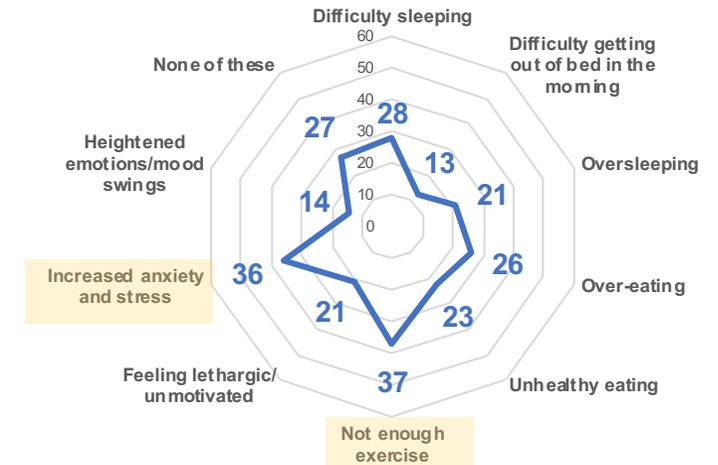
Diabetes (T2D)



Obesity



CV



People struggling with **obesity** are also experiencing multiple health-related disruptions, including **unhealthy eating** and **overeating**.

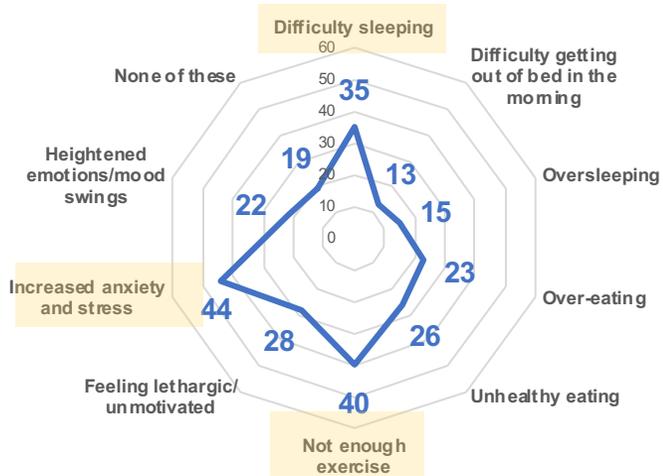
People living with **type 2 diabetes** are **coping better than those struggling with obesity**, in terms of concerns about exercise and over or unhealthy eating.

Somewhat surprisingly, people with **cardiovascular conditions** are showing the **lowest levels** of health-related disruptions.

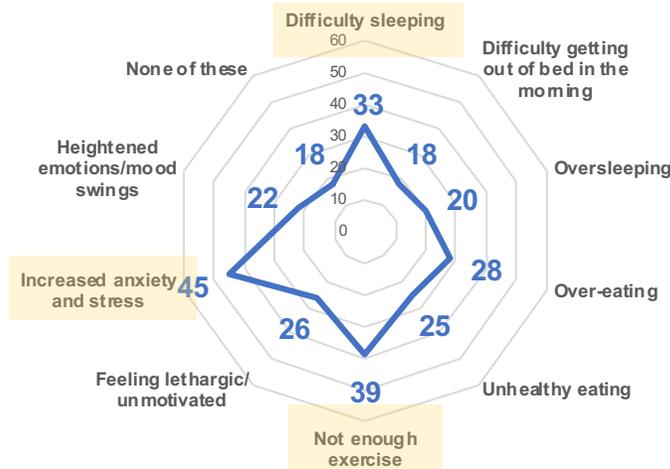
Similar patterns emerge for those living with chronic pain and autoimmune conditions

Overall Impacts on Daily Life from COVID-19

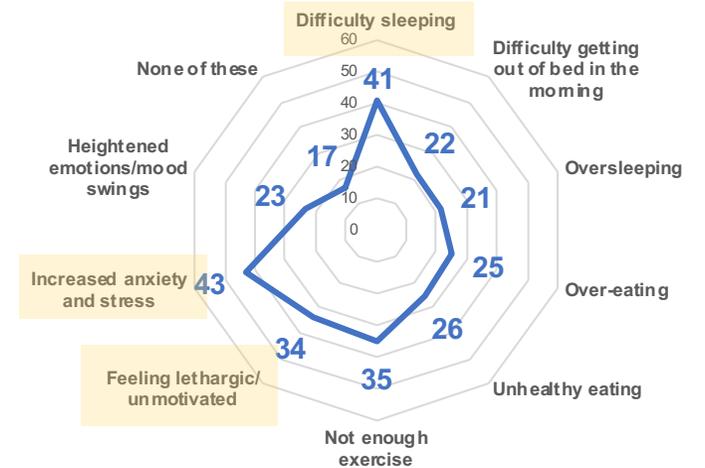
Pain



Autoimmune



CNS



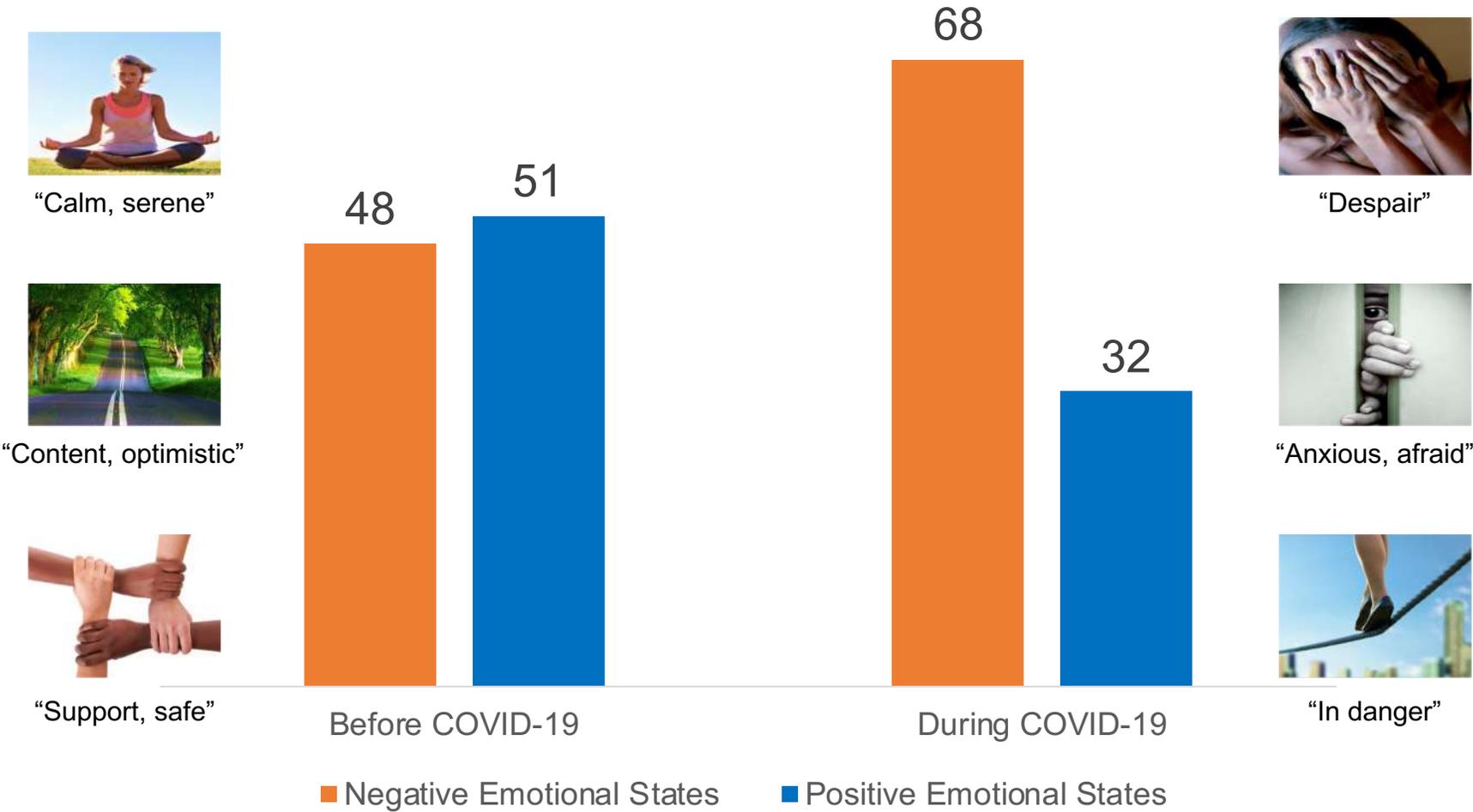
Those living with **central nervous system** conditions are more likely to be **feeling lethargic and unmotivated**, at similar levels to those **managing anxiety and depression**.

People feel significantly more negative about living with their current conditions now than before the COVID-19 pandemic

COVID-19's Impact on the Emotional State of People's Current Conditions

From a state of nearly equal positive vs. negative emotions before COVID-19, the emotional states of these patients have shifted, where they're now dramatically **out of balance**.

Importantly, their significantly increased negativity isn't about their *general* emotional state, rather their emotional state as it relates **to their current condition**.



Q. Now think back to BEFORE the COVID-19 situation. Please close your eyes for a minute and really try to capture how you felt emotionally about living with your condition(s). Please focus on that emotion, and from the below set of images select the one that best represents how you felt.

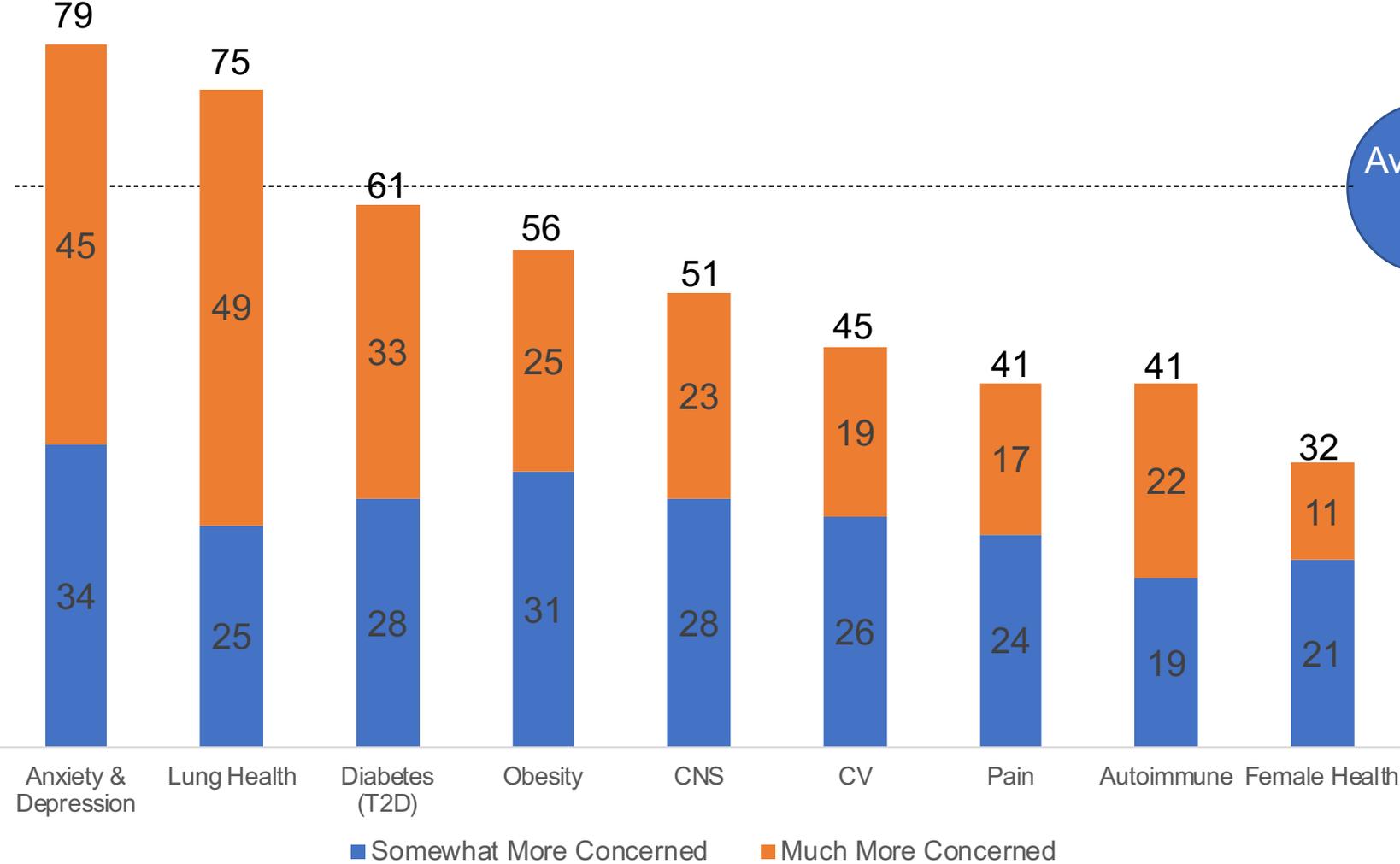
Q. Now again please close your eyes for a minute and really try to focus on how you NOW feel living with your current condition(s) during this COVID-19 situation and whether your feelings have changed at all. Now please select the image that best brings this current feeling to life. This may be the same image or a different image from the previous question.

COVID-19 has dramatically increased people’s level of concern about their current conditions...

How has COVID-19 Affected Concern about Current Conditions?

During a pandemic like COVID-19, it wouldn't be at all surprising to see people with chronic conditions suddenly focused on the virus and what it might mean to their health.

And while we're certainly seeing that in our study, we're also seeing something different: the extreme impact that COVID-19 is having on how patients **view their existing conditions**. This needs to be addressed not only by HCPs, but also by the pharmaceutical industry.



Average
63

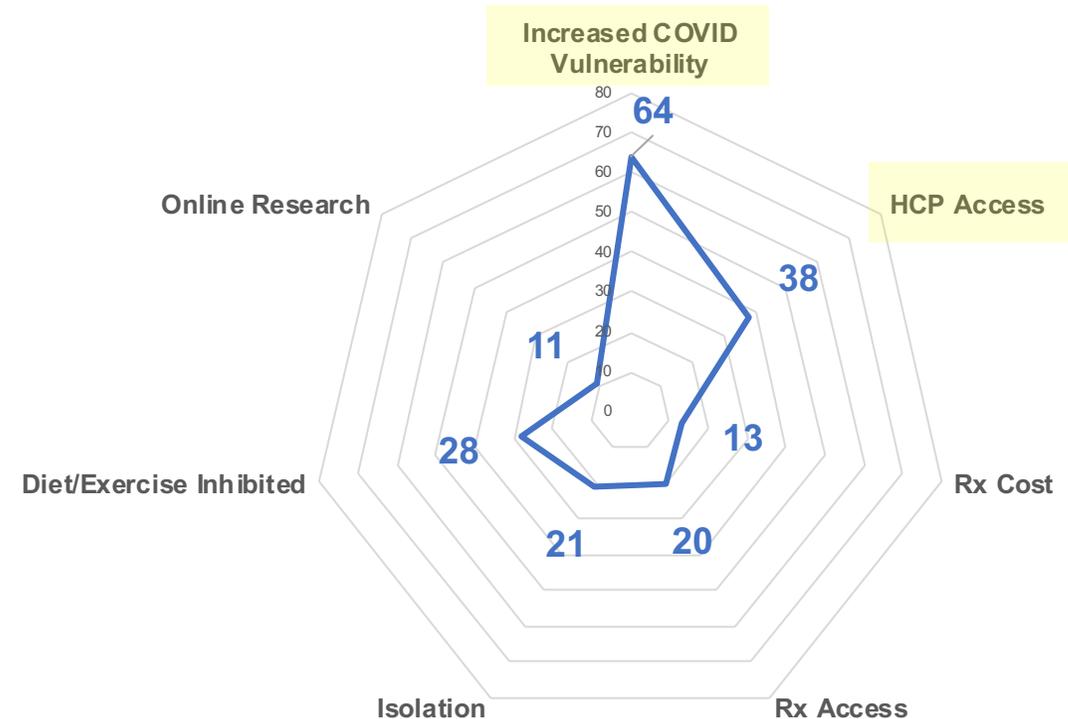
Q. How has COVID-19 affected your level of concern about your condition(s)?

...predominantly driven by a belief that their conditions will make them more vulnerable to contracting and succumbing to COVID-19

Reasons for Increased Level of Concern about Current Condition

Across the board, people in these populations are concerned that their **vulnerability** to contracting and succumbing to COVID-19 will be increased either **by their medications**, their **stress level**, and simply because they feel **their bodies are already compromised and might be unable to withstand an infection**.

Concerns about **HCP access** also heightened concerns, including not **being able to see their HCPs for routine appointments, integrated care therapies, in-office medication administrations, and diagnostics and testing**.

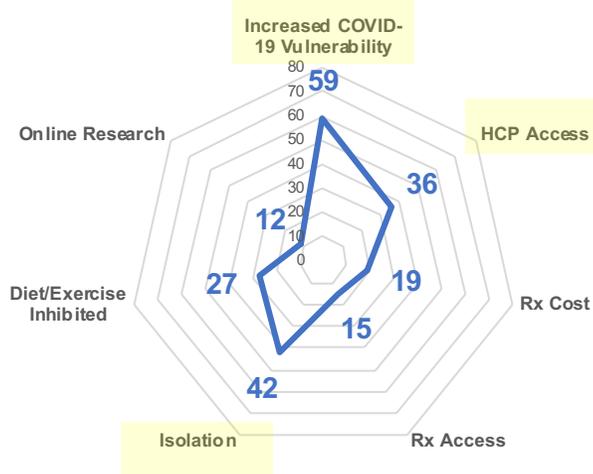


Isolation has also heightened concern about current conditions

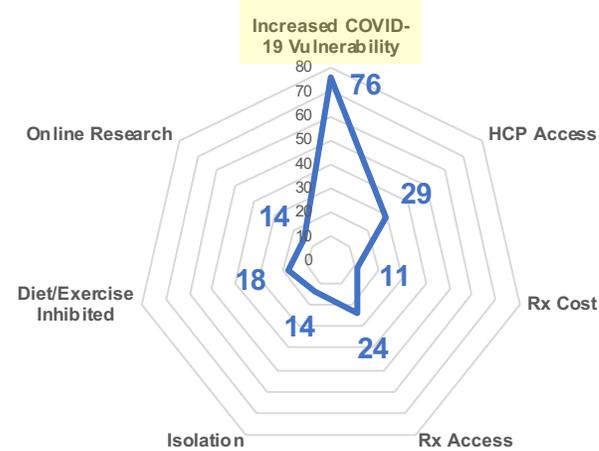
“Isolation” is also weighing hard on many for those with **anxiety and depression**, driven by a **lack of social interaction** and **being cut off from their support system**, reducing their ability to cope with their condition.

Reasons for Increased Level of Concern about Current Condition

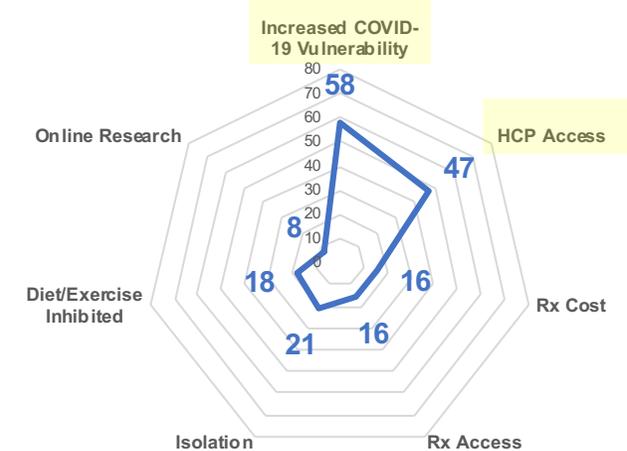
Anxiety & Depression



Lung Health



Female Health

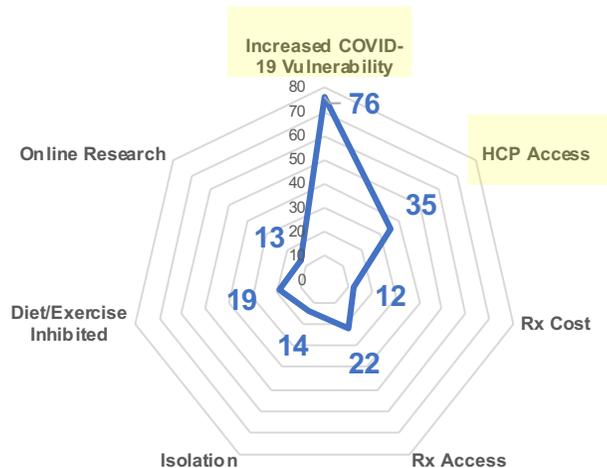


Restricted ability to exercise or maintain a healthy diet added to concerns for those with obesity and cardiovascular conditions

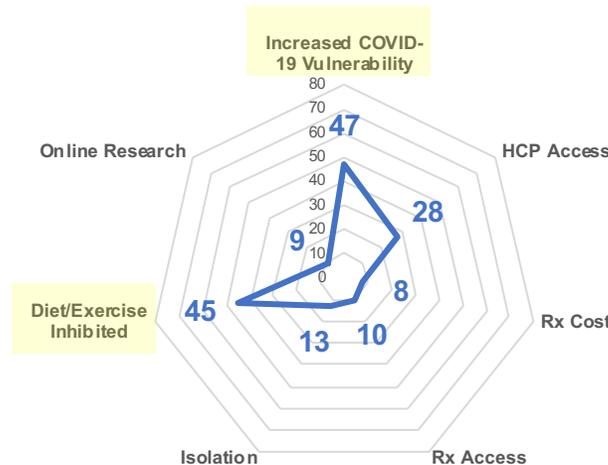
Surprisingly, restrictions on diet and exercise did not significantly increase condition-related concerns for those with diabetes. We hypothesize that this may be due to their strong concern regarding increased vulnerability to COVID-19, which worryingly, may be taking some of their focus away from their diabetes. **There may be a need for HCPs and marketers to help these patients maintain their focus on managing their existing condition.**

Reasons for Increased Level of Concern about Current Condition

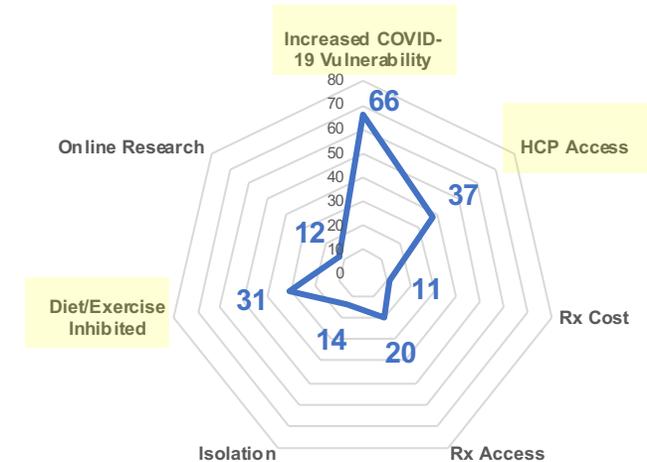
Diabetes (T2D)



Obesity



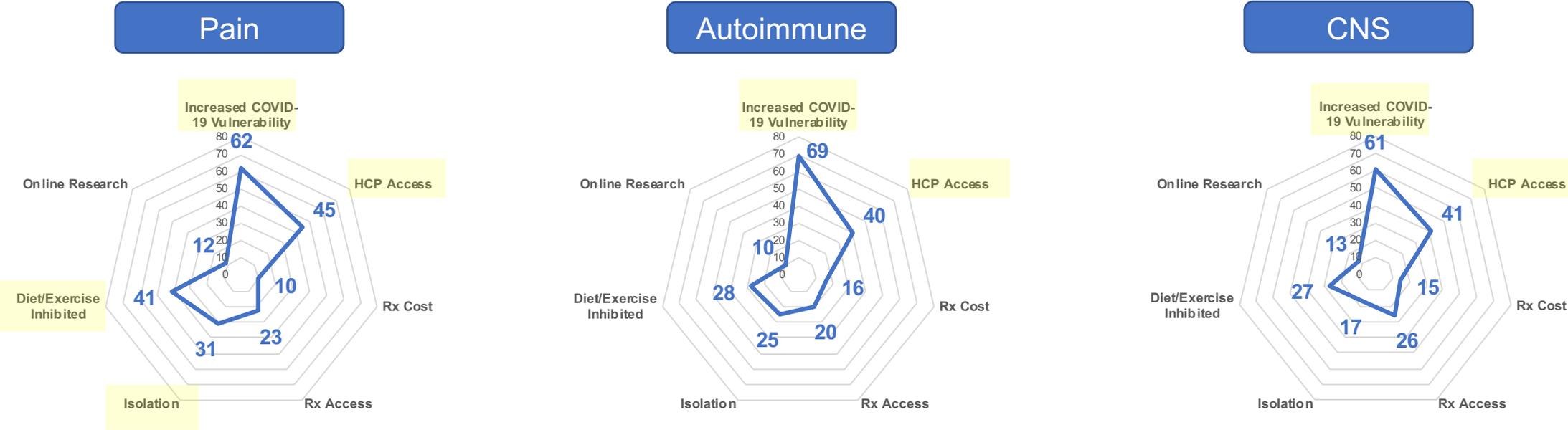
CV



Those living with chronic pain and osteoarthritis are particularly challenged, coping with four strong drivers of increased concern

Inhibited diet and exercise is impacting people living with **chronic pain** and **OA** at levels similar to those living with obesity, suggesting an opportunity to provide these patients with diet and exercise programs and ideas to help them live more healthily and better manage their conditions during the pandemic.

Reasons for Increased Level of Concern about Current Condition



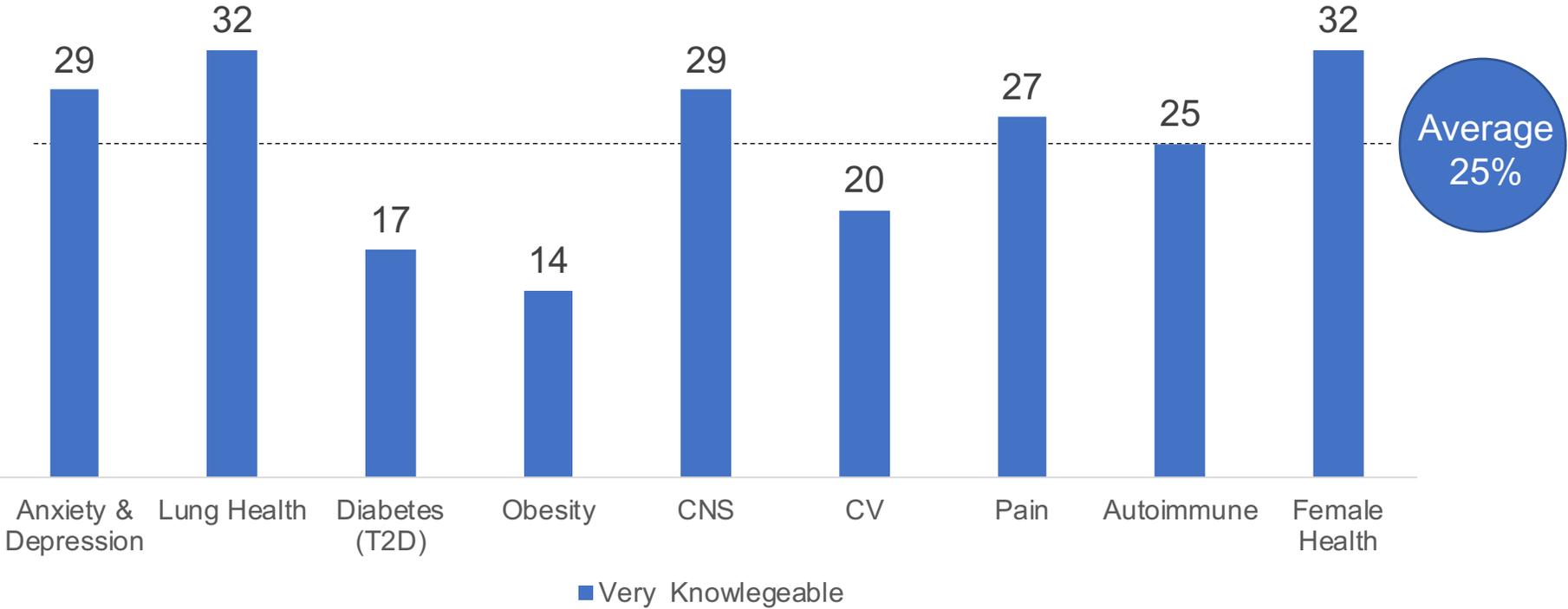
Q. Why has the COVID-19 situation increased your level of concern for your condition, for [INSERT CONDITION]? (Actual surveyed statements included in appendix.)

Interestingly, few people feel they are very knowledgeable about the impact of COVID-19 on their existing health conditions

This is likely contributing to their high levels of concern about condition vulnerability, and potentially impacting the level of restrictions they are placing on their lifestyle.

This creates an opportunity for healthcare companies to provide clarification to patients around the level of risk COVID-19 poses to them based on their specific health condition and/or treatment and **help their patients sort through the fire hose of generalized (and sometimes conflicting) news and information.**

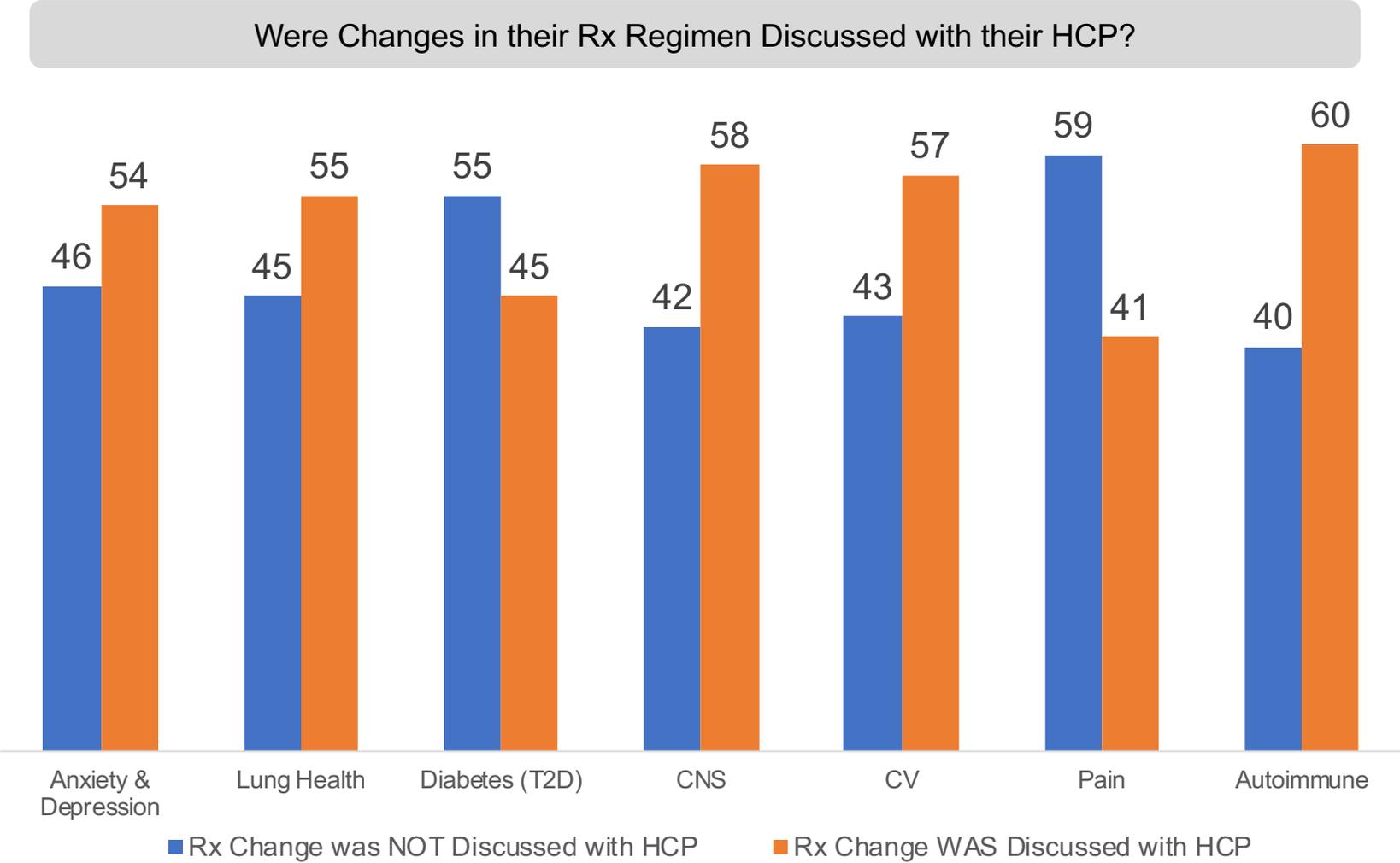
How Knowledgeable are People about COVID-19's Impact on their Current Conditions?





How is COVID-19
Impacting
Patient Treatment
Behaviors?

One in three patients have made, or are considering making some change to the amount of medication they are taking - and what's particularly alarming is that many are going rogue, with nearly half making changes to their medication regimen without consulting their HCP



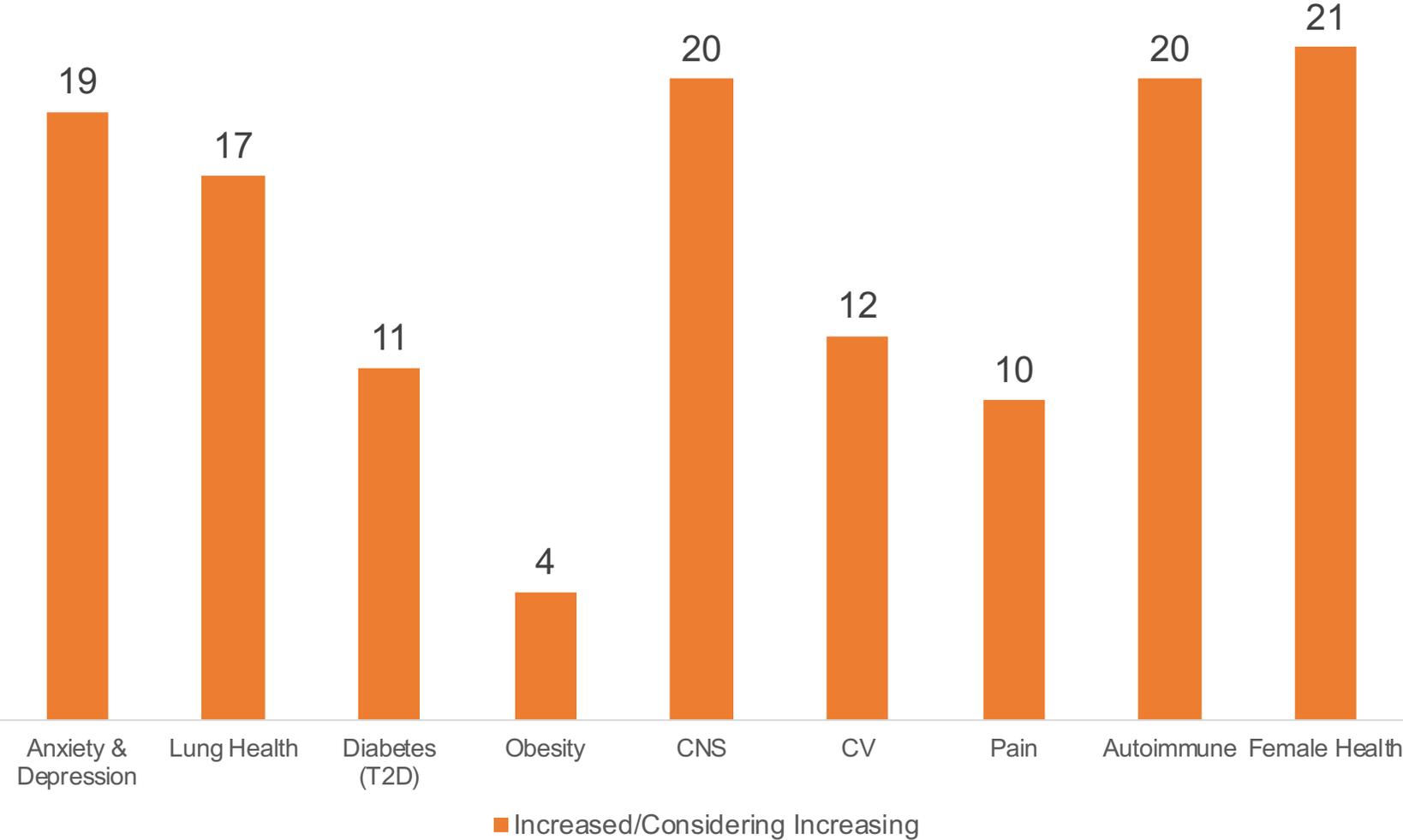
Q. Was the change you made to your medication for your [INSERT CONDITION] discussed with your healthcare provider before making it?

A surprising number say that COVID-19 has caused them to increase or consider increasing the amount of Rx medications they take for their existing conditions

How has COVID-19 Impacted how People are Taking their Rx for their Current Conditions?

While patient dosing compliance has long been a challenge in healthcare, the **COVID-19 pandemic appears to have amplified the phenomenon.**

It's almost counter-intuitive to think that patients in these vulnerable populations would be changing their medication regimen.



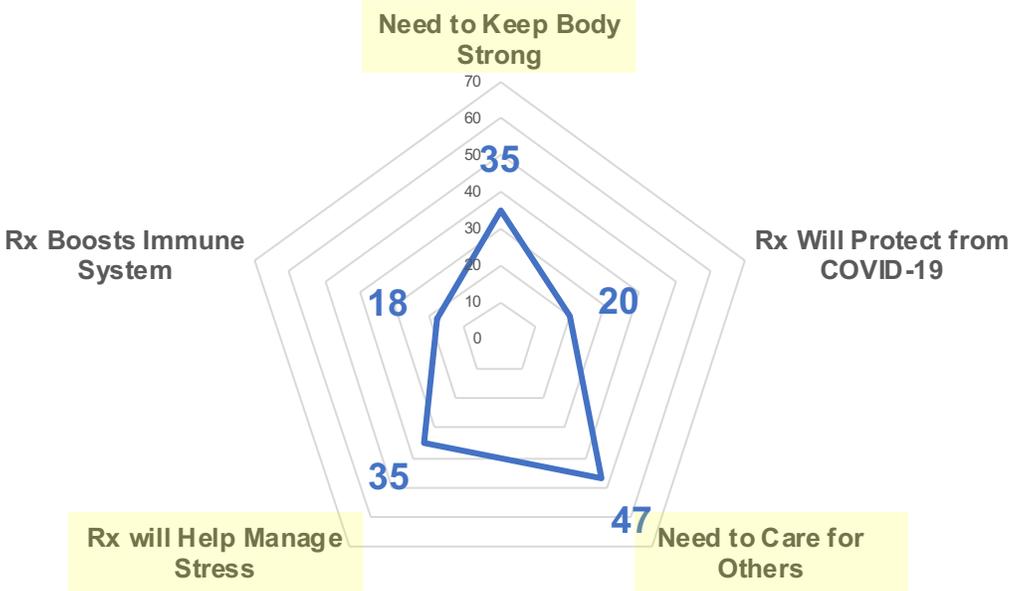
Q. In what ways, if any, has the COVID-19 situation impacted the way you currently take or are considering taking your prescription medications for the treatment of CONDITION?

While patients state a number of reasons for increasing their medications, three stand out: a desire to treat their condition more effectively to keep their bodies strong, to help mitigate their stress, and a more selfless imperative to stay as healthy as possible to care for others

Reasons for Increasing Medication

Patients seem to be equating **higher dosing of their medication with improved health** and need to be reminded that increased dosing doesn't equate to better treatment of their condition – **not to mention that changes should only be made under HCP supervision.**

Perhaps communication of the need to take their medication as prescribed could also be connected to the **need to stay strong**, and therefore **be able to care for others** during this unprecedented time, as these seem to be strong behavioral drivers.

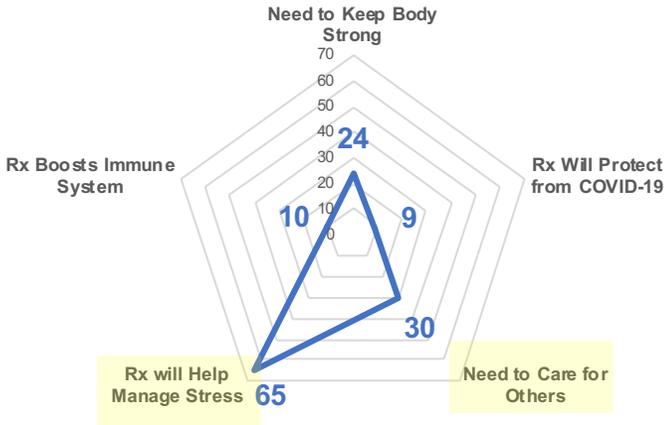


Q. Which of the following concerns, if any, impacted your consideration or decision to increase the amount of medication, or start a new medication, for CONDITION because of the COVID-19 situation?

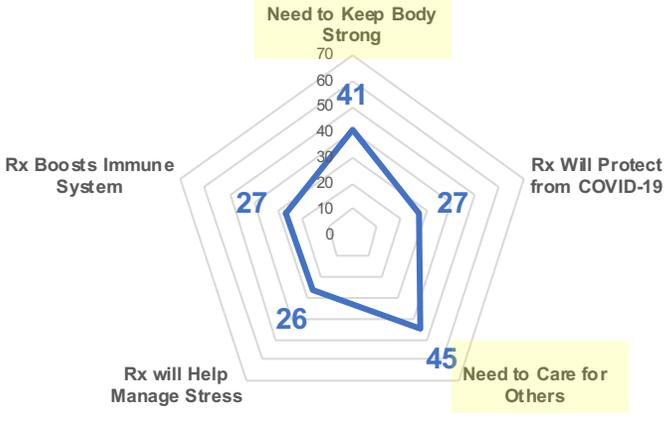
The need to care for others is particularly high among those living with female health issues, while those with anxiety and depression believe that their existing medication will help them manage the increased stress caused by COVID-19

Reasons for Increasing Medication

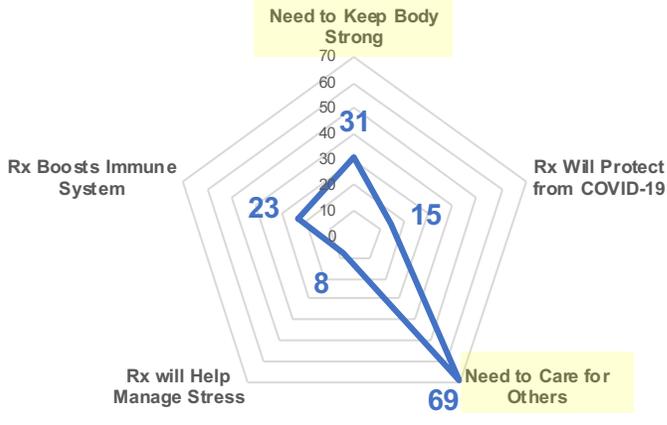
Anxiety & Depression



Lung Health



Female Health



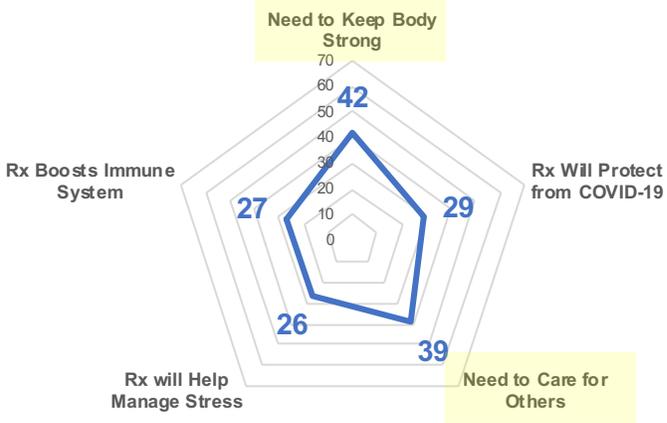
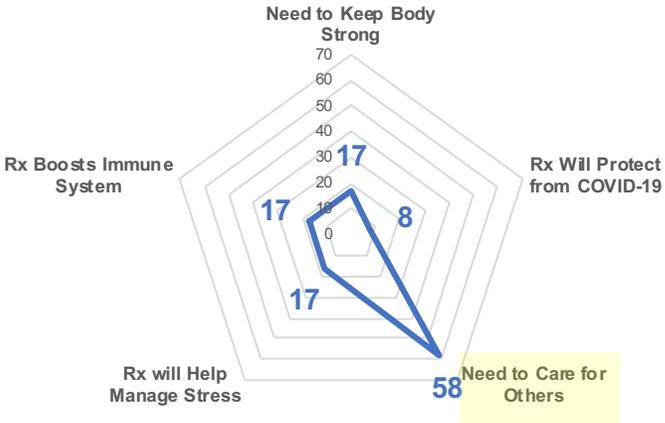
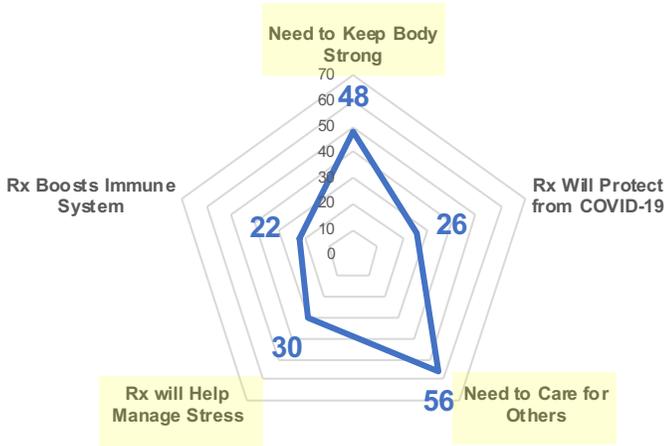
The need to care for others is the dominant driver of medication increases for those living with obesity and diabetes

Reasons for Increasing Medication

Diabetes (T2D)

Obesity

CV



For those with **diabetes** and **obesity**, the concern about caring for others is likely driven by a **higher proportion having children**. **Diabetics** are also more likely to **be working from home** during the pandemic, so they're acutely aware of juggling the challenges of working while simultaneously caring for others.

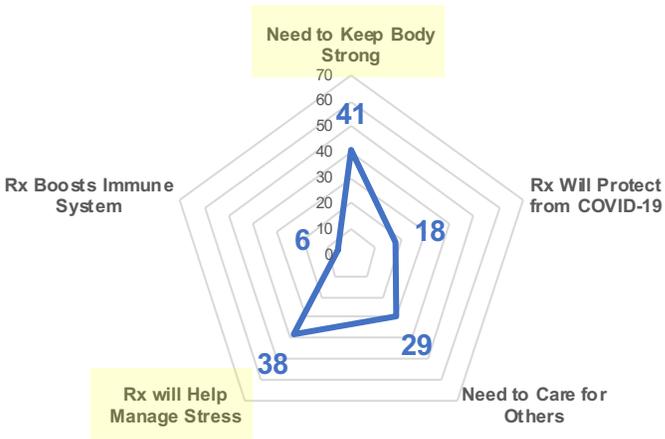
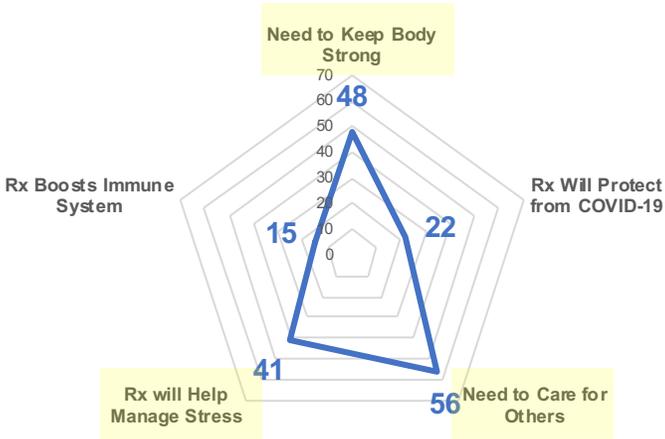
Managing stress, caring for others and keeping the body strong are also key drivers for those living with pain, autoimmune and central nervous system conditions

Reasons for Increasing Medication

Pain

Autoimmune

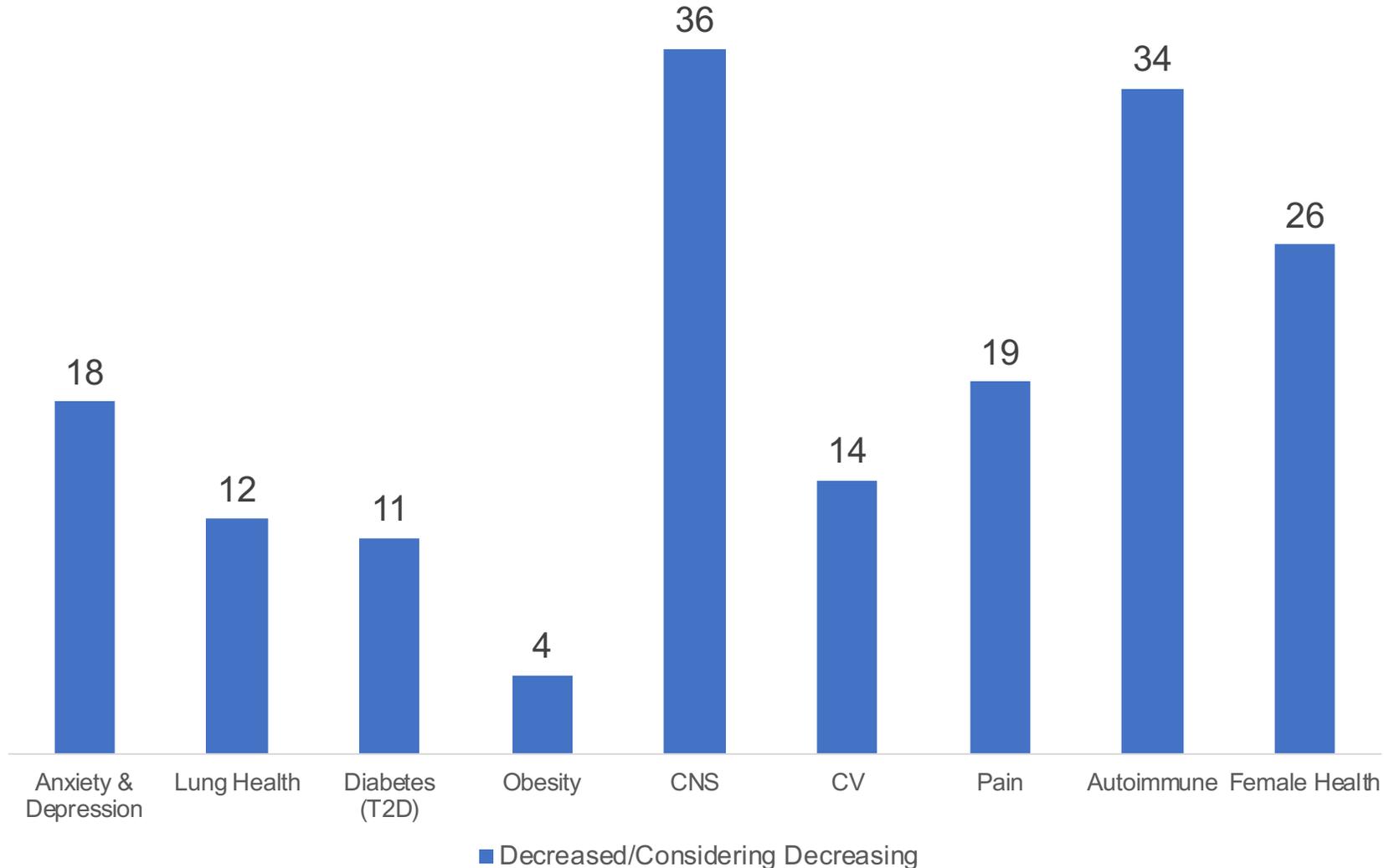
CNS



Key opportunity for healthcare companies to harness the strong behavioral driver of patients wanting **to stay healthy in order to care for others** as a “way in” within current positioning and communications initiatives.

Perhaps more concerning than the numbers of patients increasing medication dosing, is that even more are decreasing or considering decreasing their prescription medications due to COVID-19

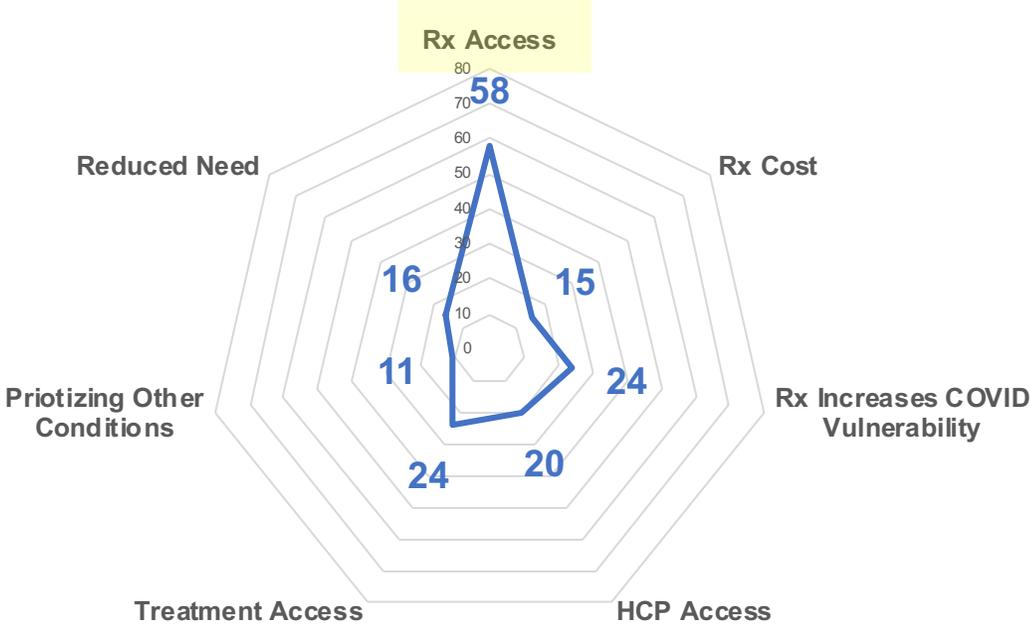
How has COVID-19 Impacted how People are Taking their Rx for their Current Conditions?



Across therapeutic areas, these decreases are primarily driven by concerns about access to their medications

Their concerns about access include fears about **running out of their medications**, concerns about **not being able to get to the pharmacy to refill their prescriptions**, **not knowing how to get their prescriptions delivered**, and fearing that **the supply of their medication might be curtailed**.

Reasons for Decreasing Medication



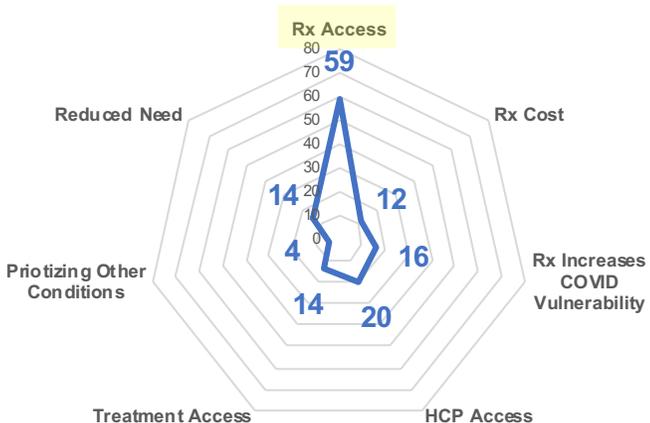
Q. Which of the following concerns, if any, impacted your consideration or decision to decrease the amount of medication you take for [CONDITION] because of the COVID-19 situation? (Actual surveyed statements included in appendix.)

Patients with female health conditions are also concerned about treatment access, as well as about medications increasing their COVID-19 vulnerability

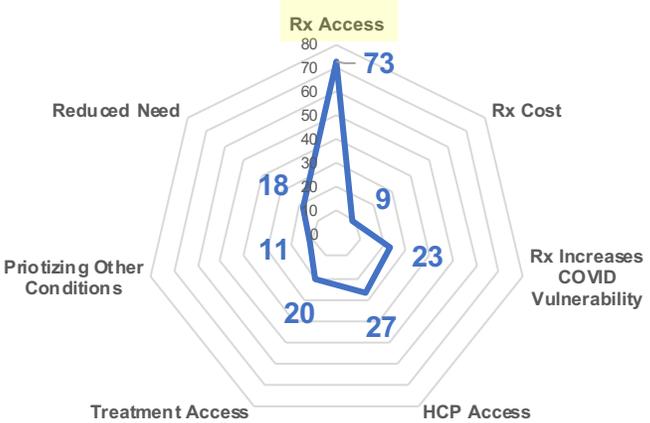
Among those concerned about their Rx increasing their COVID-19 vulnerability, some express a **generalized concern about their vulnerability** while others are specifically worried about their **medication suppressing their immune system**.

Reasons for **Decreasing Medication**

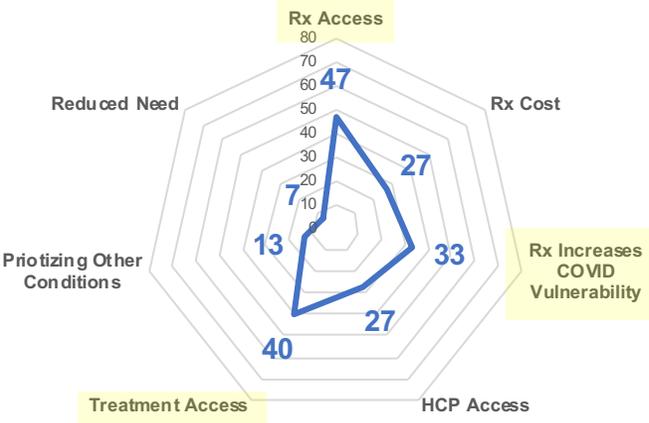
Anxiety & Depression



Lung Health



Female Health



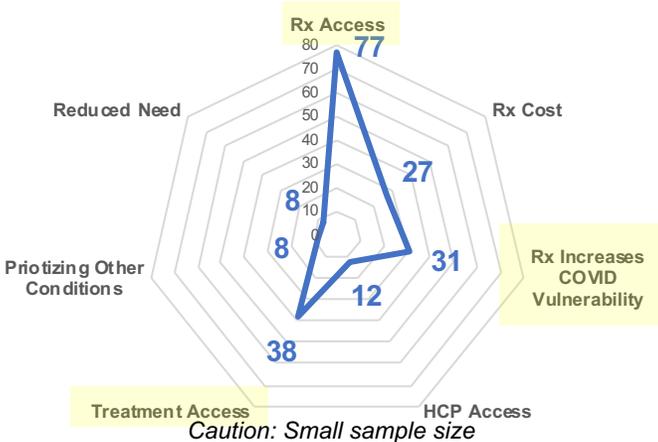
Caution: Small sample size

Similar patterns emerged for those living with type 2 diabetes and cardiovascular conditions, while those living with obesity also believe they have reduced need for their medications

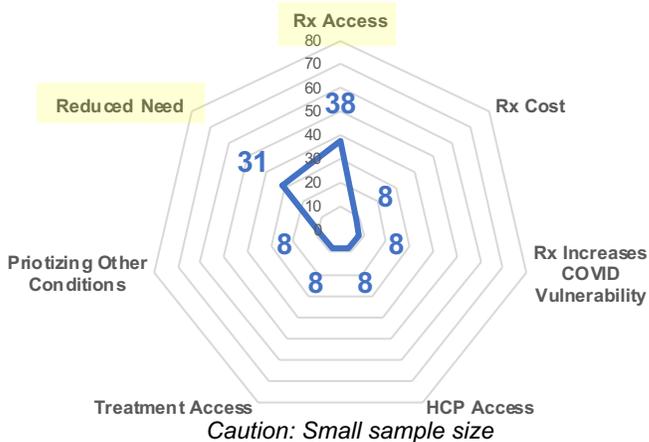
This **reduced need** seems counter-intuitive to their concerns about overeating, inhibited diet and exercise, and increased COVID vulnerability - but may be driven by their strong focus on helping others, and perhaps therefore **not taking such good care of themselves**. Again messaging about **taking medications as prescribed to stay well** in order to **care for others** may resonate.

Reasons for Decreasing Medication

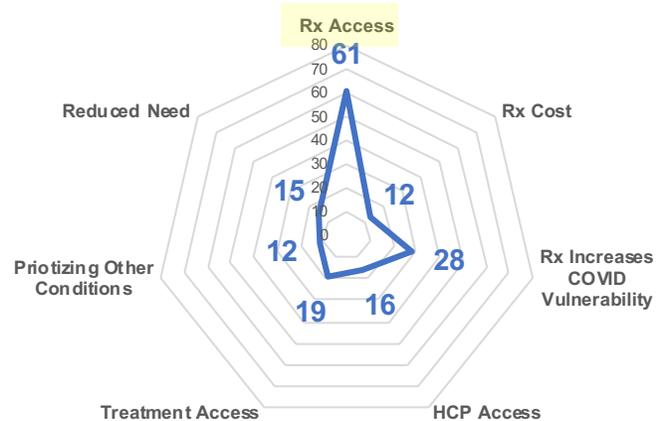
Diabetes (T2D)



Obesity



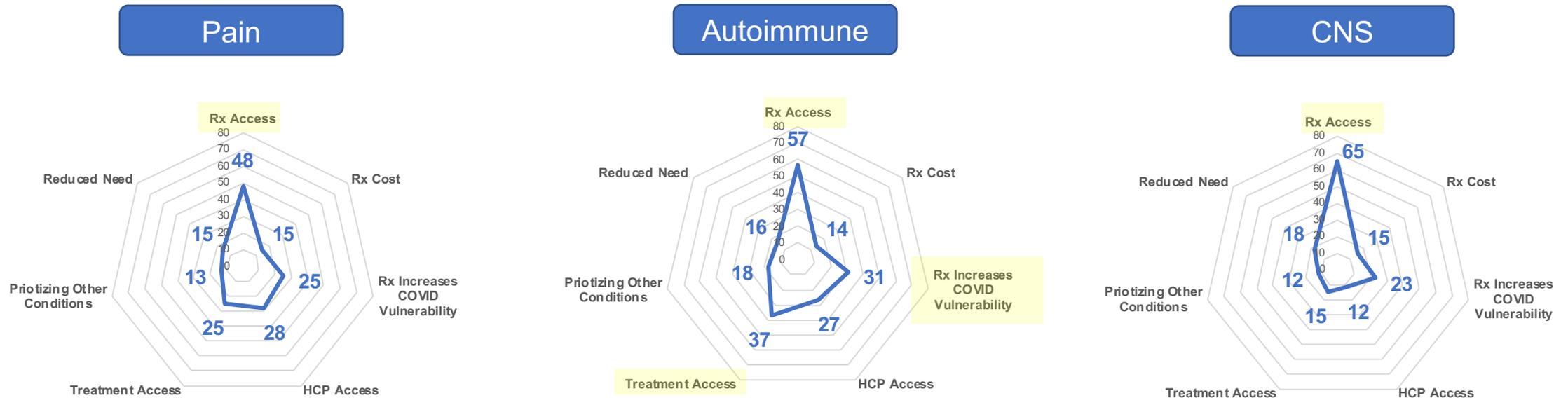
CV



Rx access continues to dominate reasons for medication decreases for those living with pain, autoimmune and CNS conditions

For those living with autoimmune conditions, **treatment access** was also a driver for medication decreases due to their **inability to obtain in-office administration** (e.g. infusions), and the understanding that their medications **suppress their immune system**.

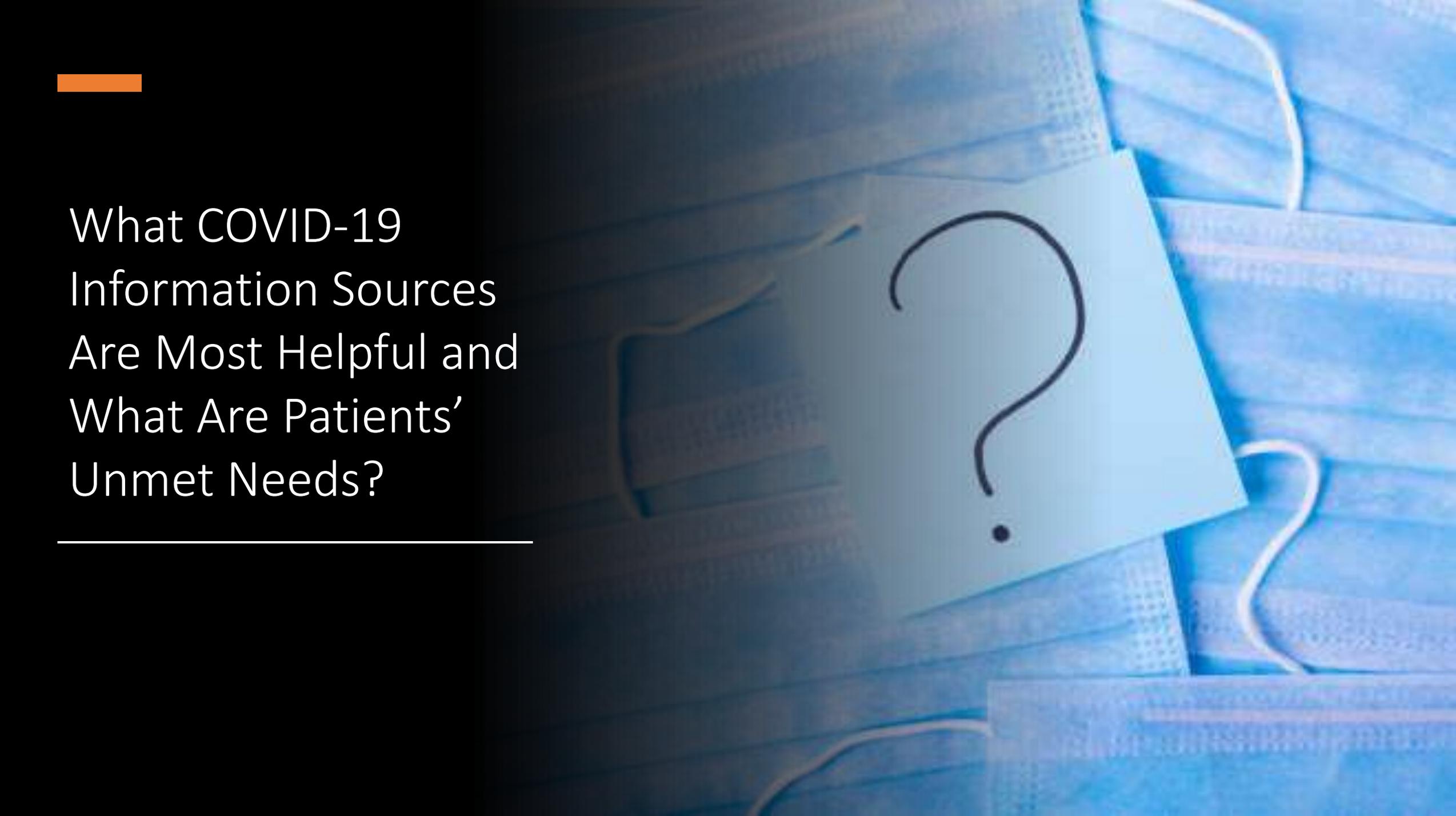
Reasons for Decreasing Medication



There is a need for pharmaceutical companies to not only provide **reassuring messages about the security of the drug supply chain**, but also **recommendations and resources for how to get prescriptions delivered**.

It is worth considering that COVID-19 appears to be bringing **mortality, vulnerability** and the **critical importance of maintaining health** into more prominent focus for many patients. This represents a unique moment in time, after which patients may become **particularly receptive to initiatives driving behavior-change**, including getting diagnosed, finding the right treatment, adhering to their regimens, and adopting more effective health behaviors overall.

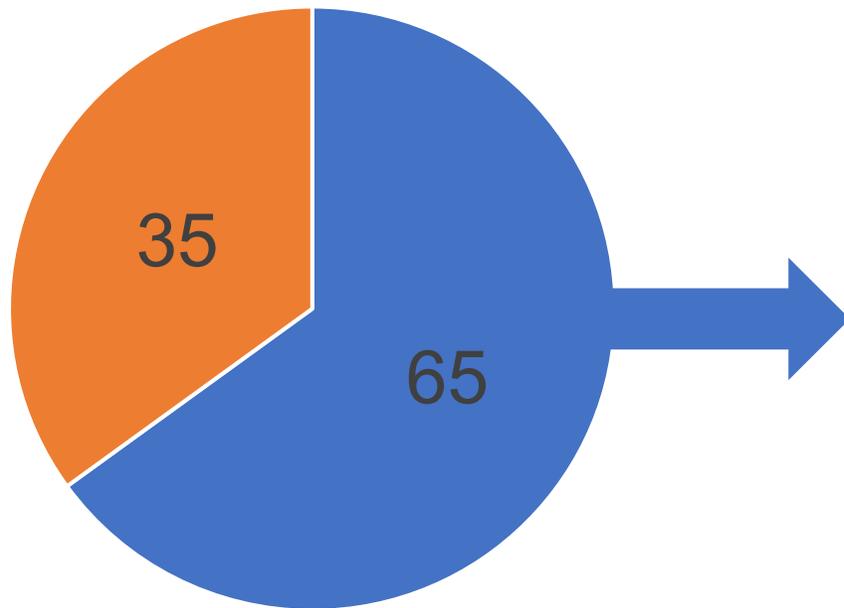


The background of the slide features a stack of several blue surgical masks. A white piece of paper with a large, hand-drawn black question mark is placed on top of the masks. In the top left corner, there is a small orange horizontal bar.

What COVID-19
Information Sources
Are Most Helpful and
What Are Patients'
Unmet Needs?

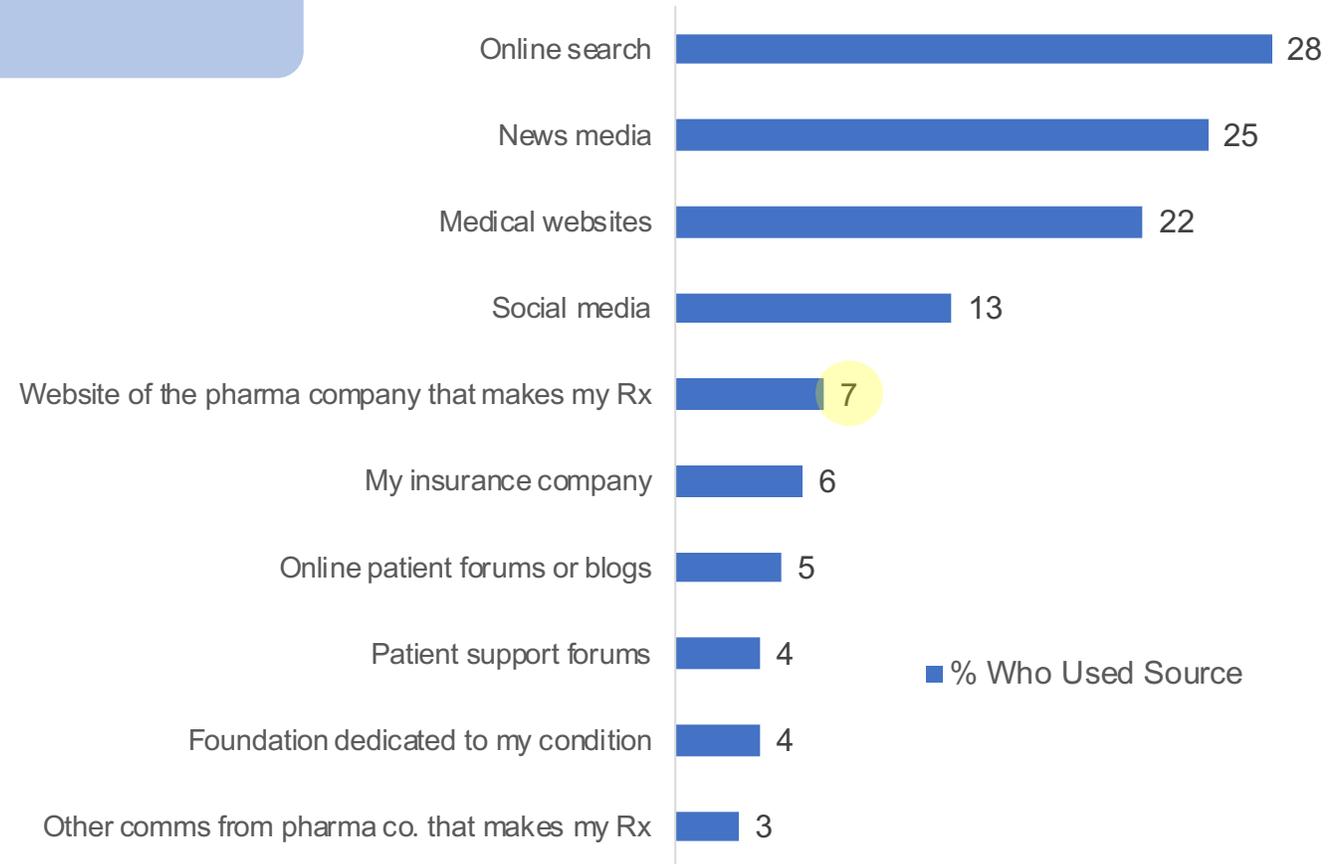
Many have questions; two-thirds are seeking information about COVID-19's impact on their conditions, with online searches, news media and medical websites being the most common information sources

Unfortunately, **only a few are going to the website of the pharmaceutical company** that makes their prescription.



- Have Sought COVID-19 Information Pertaining to their Condition(s)
- Have Not Sought COVID-19 Information Pertaining to their Condition(s)

Sources turned to for information regarding COVID-19 and their current condition(s)

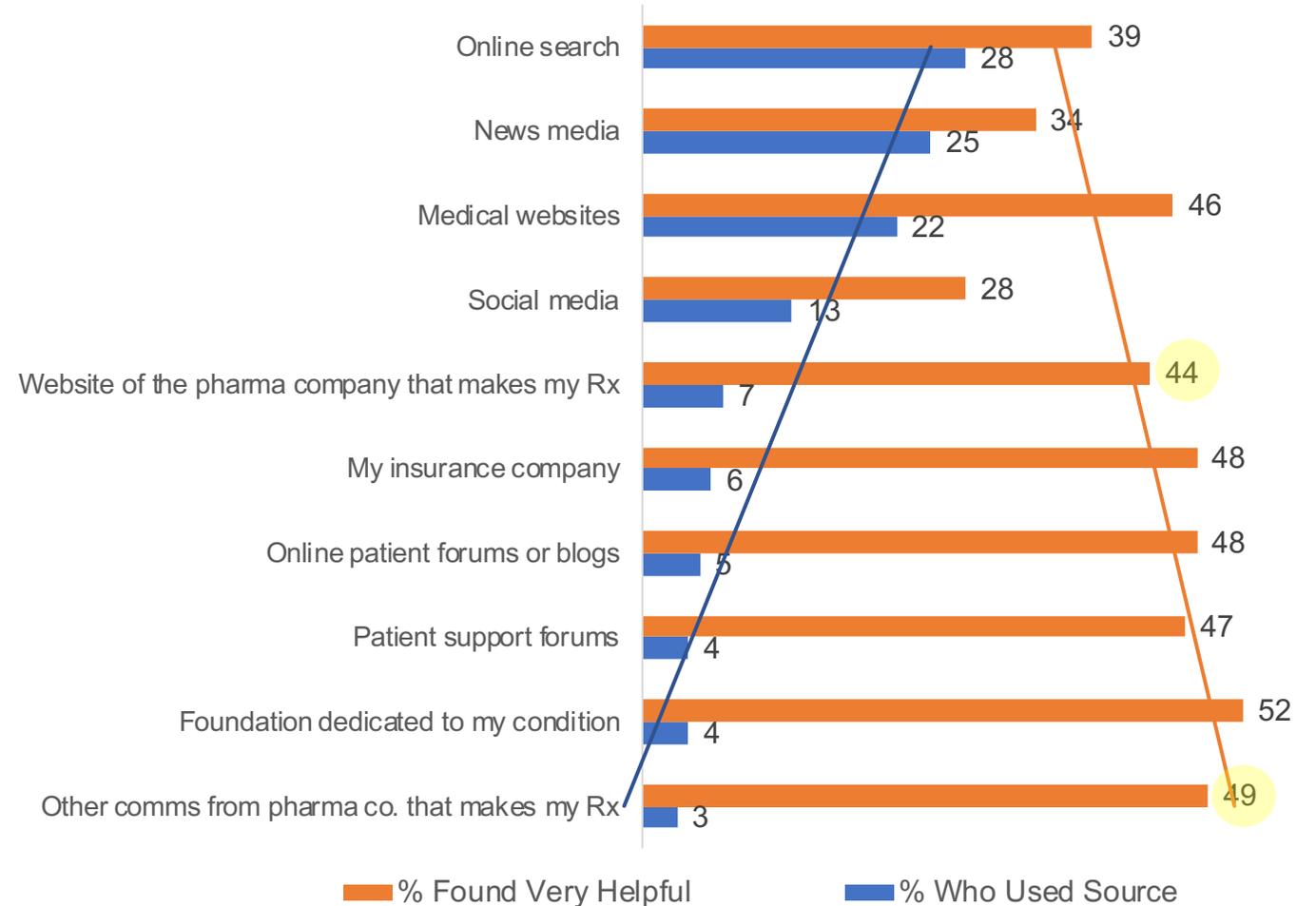


■ % Who Used Source

The most helpful sources of information tended to be the least commonly used

Pharma company websites and communications **get high marks for being helpful**, but were among **the least likely sources of information** about COVID-19's impact on their conditions and treatment.

This suggests a strong need for pharma companies to include **this information in their communications and raise awareness of its availability.**



Many are hungry for more COVID-related information and resources

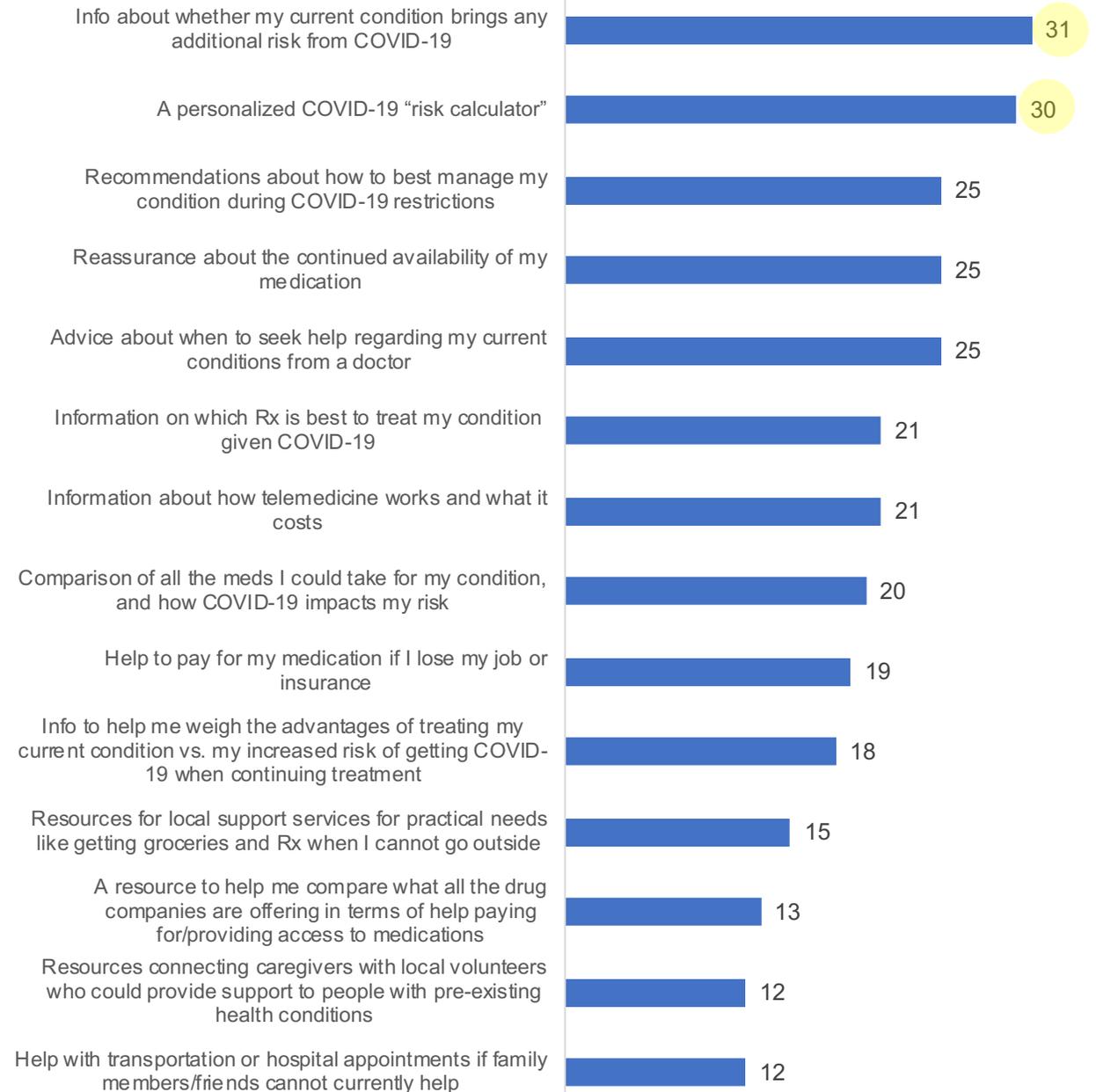
The biggest unmet informational need is for a **clearer understanding of their own personal COVID-19 risk** based on their current health conditions, current treatments and other personal factors.

They would also value **medication comparisons in terms of risks vs. benefits** in the context of COVID-19, as well as **advice about how to best manage their conditions**.

Other needs include **reassurance about medication availability, financial support resources and information about telemedicine**.

These all represent areas of **immediate opportunity for pharmaceutical companies**, if this information isn't already being provided.

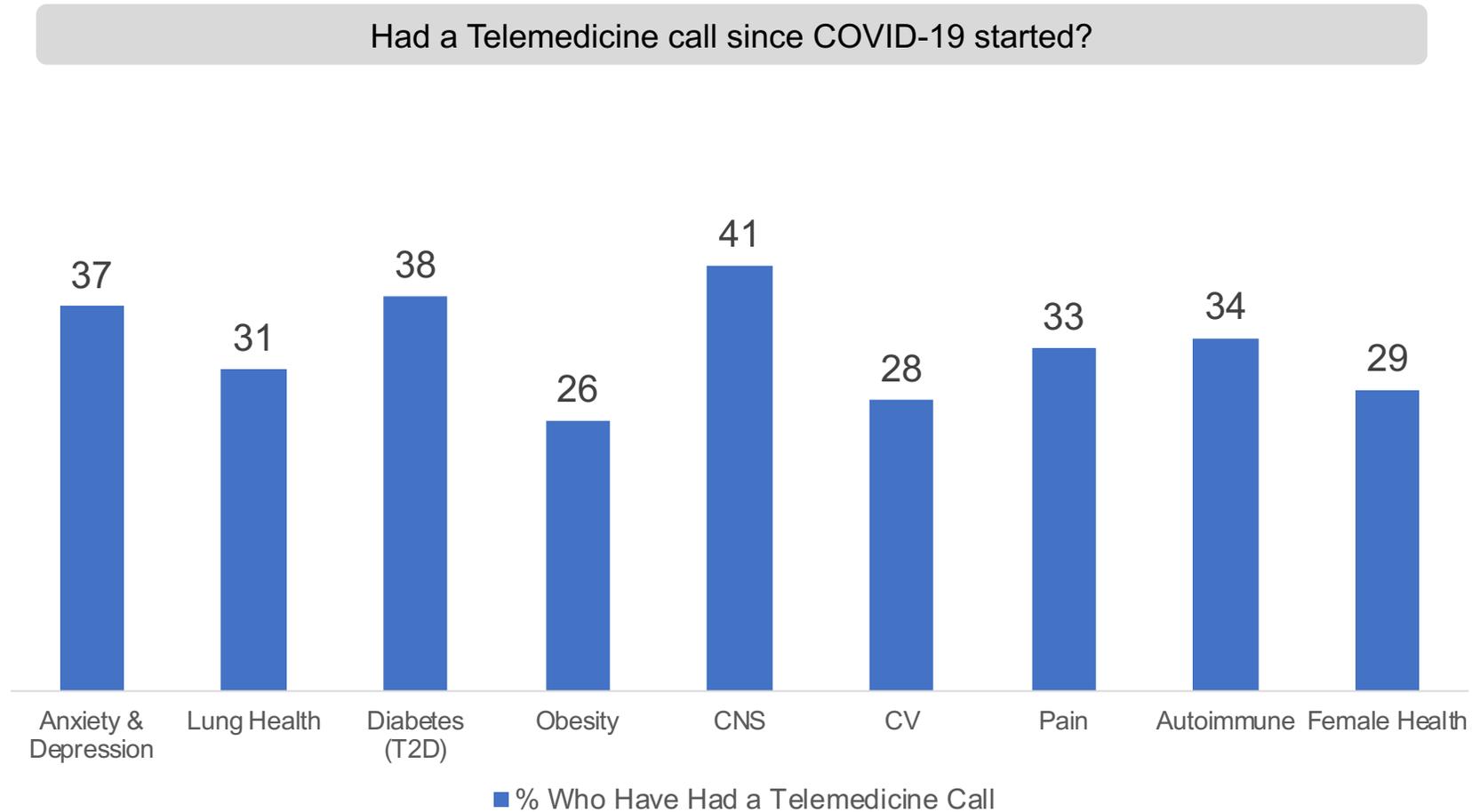
Resource/Information Gaps





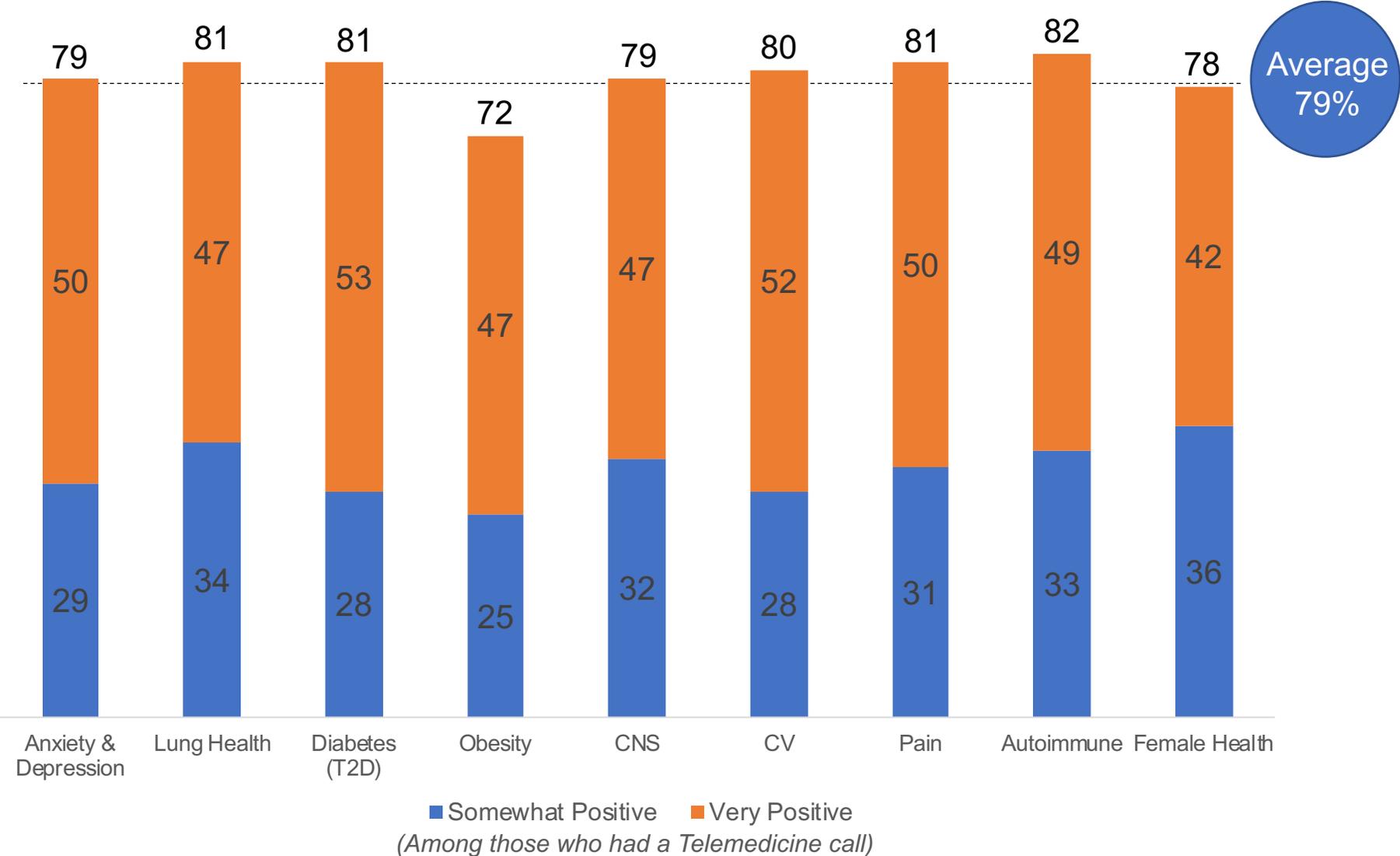
Telemedicine
During
COVID-19

Since the start of the pandemic, a significant portion of patients (one-in-three) have used telemedicine – often for the first time, and across all condition areas...



...and the vast majority had a positive telemedicine experience

Experience having a Telemedicine call, since COVID-19 started



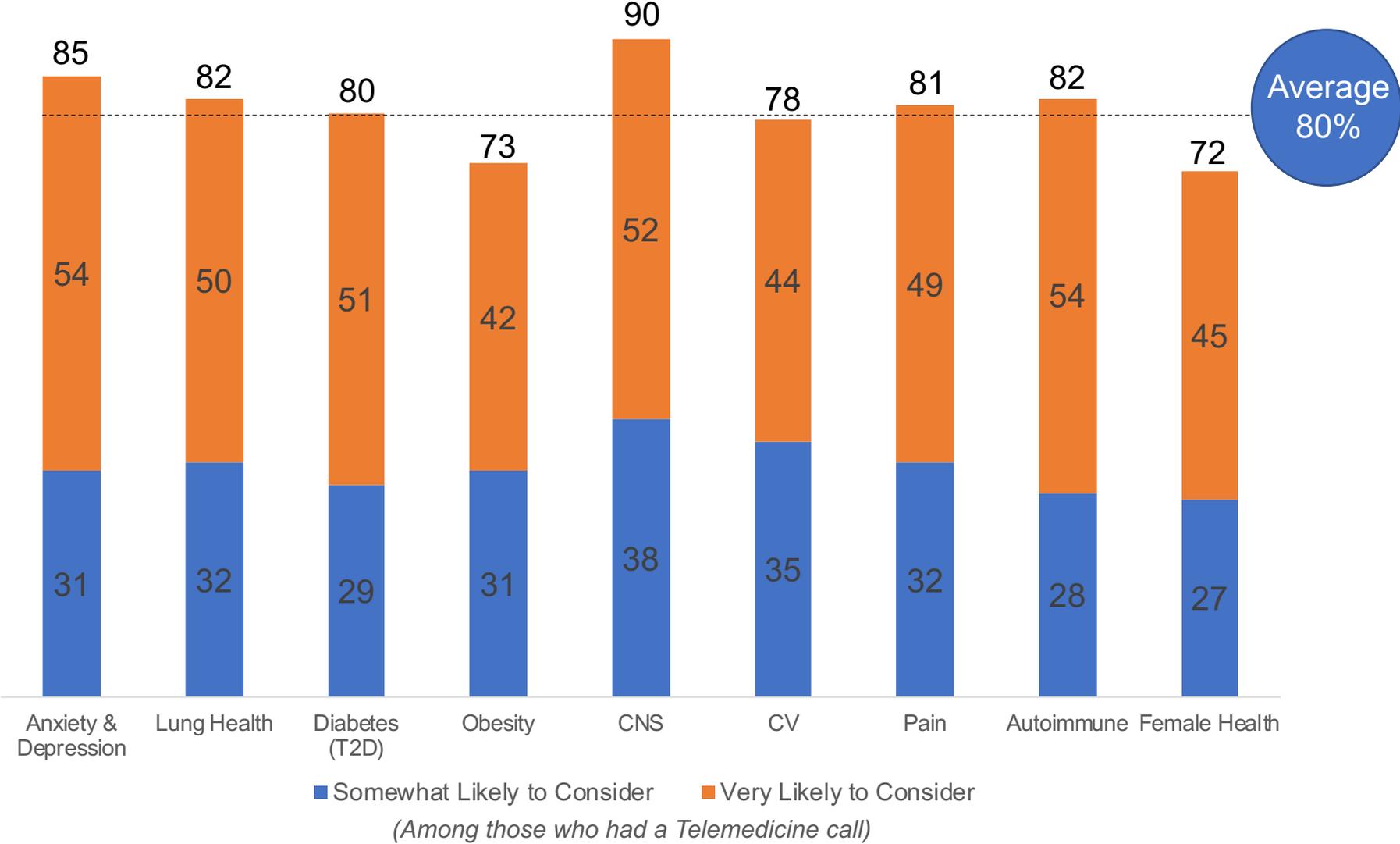
Q. How would you describe the telemedicine experience you've had with your doctor/healthcare provider since the COVID-19 situation started?

Most are likely to consider continuing to use telemedicine for their HCP interactions after the COVID-19 threat subsides

Likelihood to Continue Telemedicine Calls Once COVID-19 is No Longer a Threat?

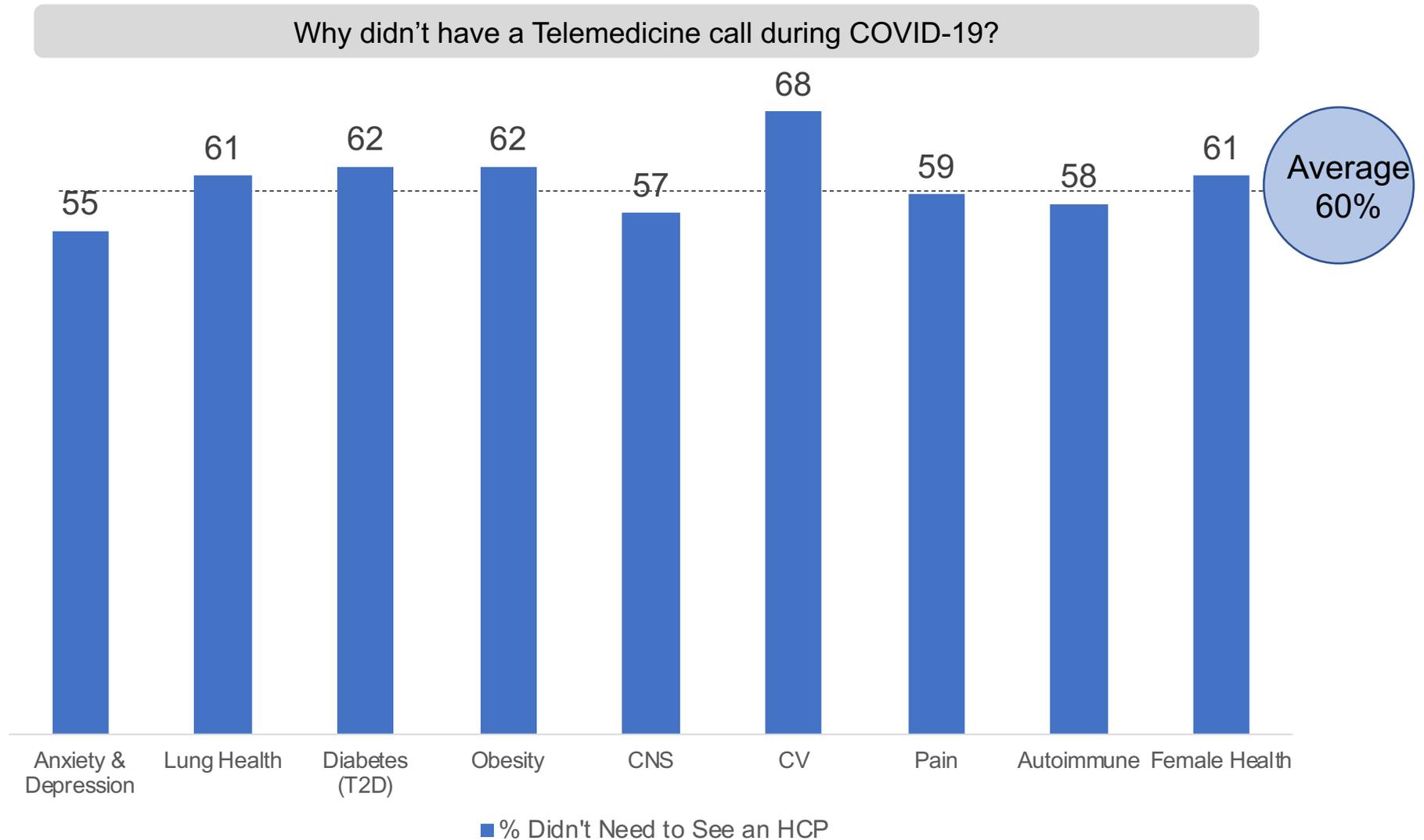
Like a number of behavior changes people have experienced during the pandemic, **telemedicine calls** – now that people have experienced them and came away with a positive experience – are **likely to be added to the ways in which patients engage with the healthcare system post pandemic.**

Payers, providers and pharma all need to consider the implications of this for their current engagement and marketing activities.



Q. How likely or not likely are you to consider continuing your interactions with your healthcare provider via telemedicine in the future, after the COVID-19 is no longer a threat – for either occasional medical needs or for most of your medical care appointments?

The key reason for not using telemedicine so far is as simple as not having needed to see a HCP during the pandemic



(Among those who didn't have a Telemedicine call)

Tech concerns and HCPs not offering telemedicine are the key reasons for lack of trial thus far

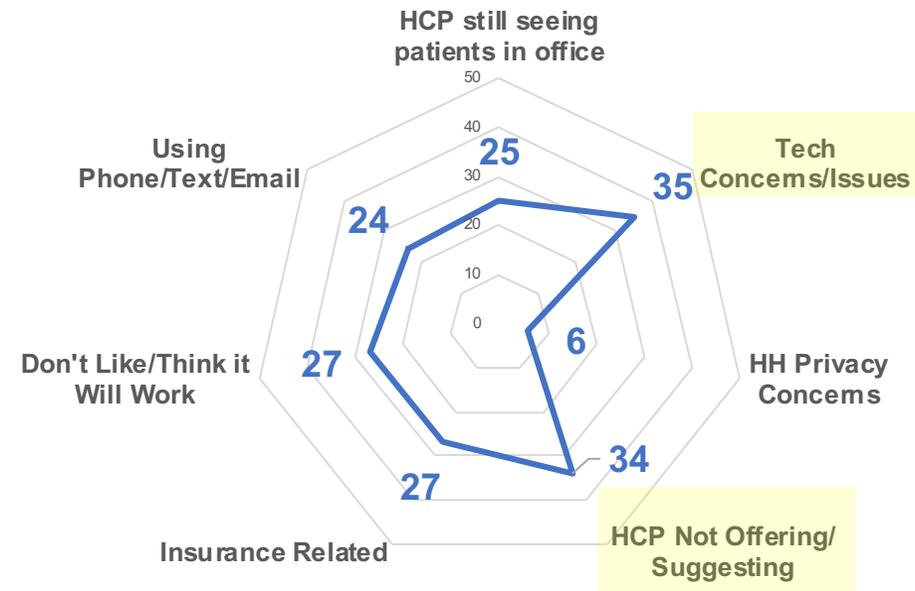
In many cases, **HCPs either aren't offering or suggesting telemedicine, or the patients haven't asked yet.**

In fact some patients report **still seeing their HCP in the office or communicating via text/email.**

Technology barriers are also an issue for some. Some of these are more about **familiarity**, though some are **structural** (no Wi-Fi, no webcam).

And of course, there are some who are simply **unconvinced that telemedicine will work.**

Why not used Telemedicine during COVID-19? (Among those who did have a reason to see a HCP during COVID-19)

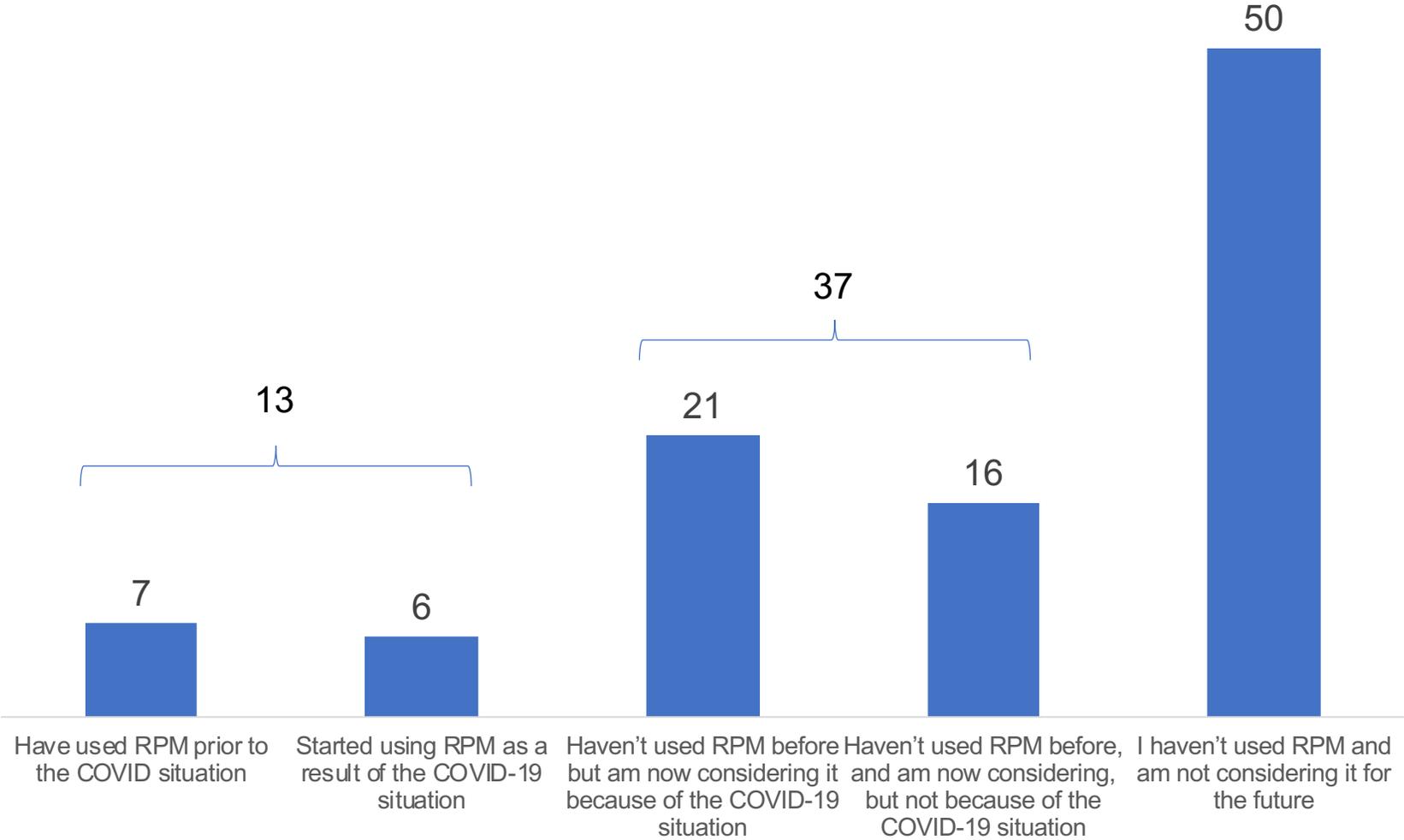


In contrast to telemedicine, Remote Patient Monitoring (RPM) has not enjoyed the same level of adoption during the pandemic

Usage of Remote Patient Monitoring (RPM)

Furthermore, **half of patients are not considering it for the future.**

While an increase in telemedicine adoption will likely drive some adoption of RPM, **uptake will need to be provider and payer led.**



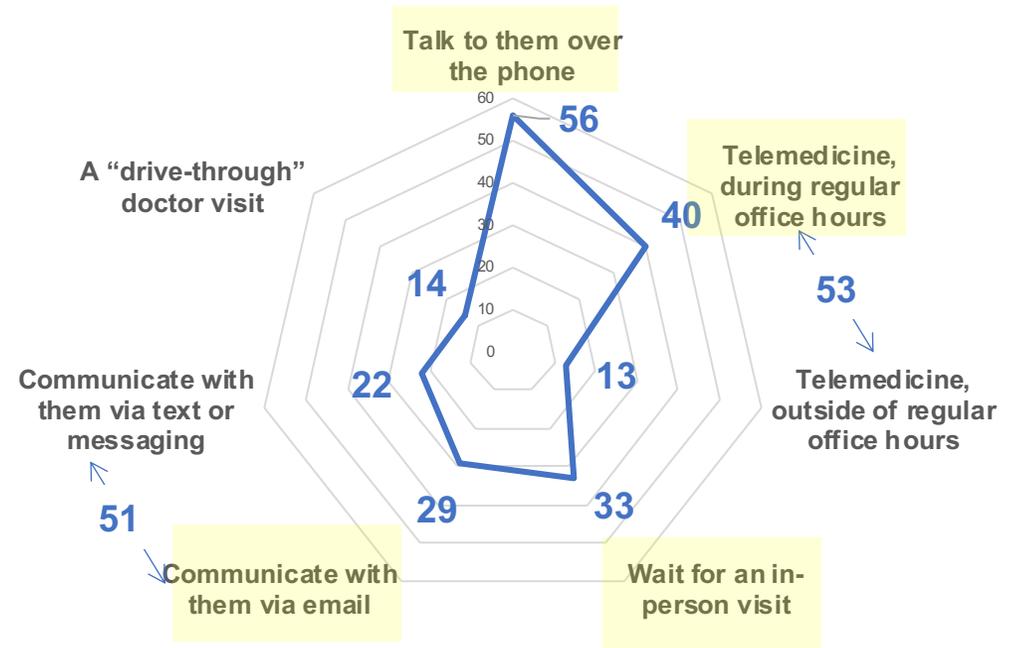
Given an expanding array of HCP touchpoints, especially during the pandemic, many of these patients are showing an inclination towards a toolkit approach

When and where possible, **in-person visits** are still, of course, desirable. So are **telephone calls**...

...but **technology is clearly seeping into the toolkit.**

The new technology toolkit will likely be a **blend of technologies** the average patient has come to rely on for daily life - **e-mail and text messaging**, as well as the newer (though fairly well-tested during the pandemic) **telemedicine**.

Preferred Methods to Engage with HCPs during COVID-19





COVID-19 and Health Insurance

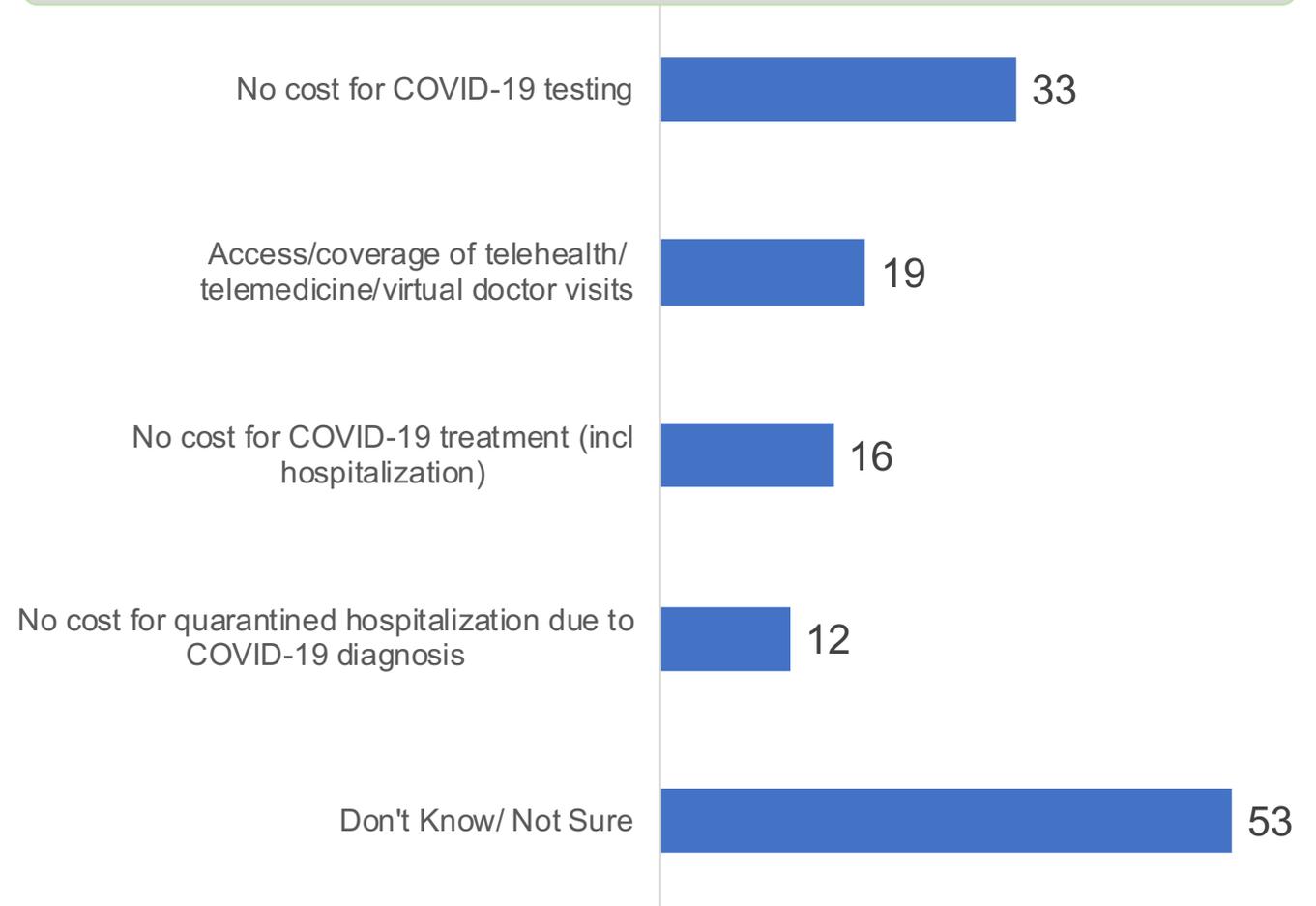


Health
Insurance

Only half of patients are aware that payers have expanded enrollee benefits due to COVID-19

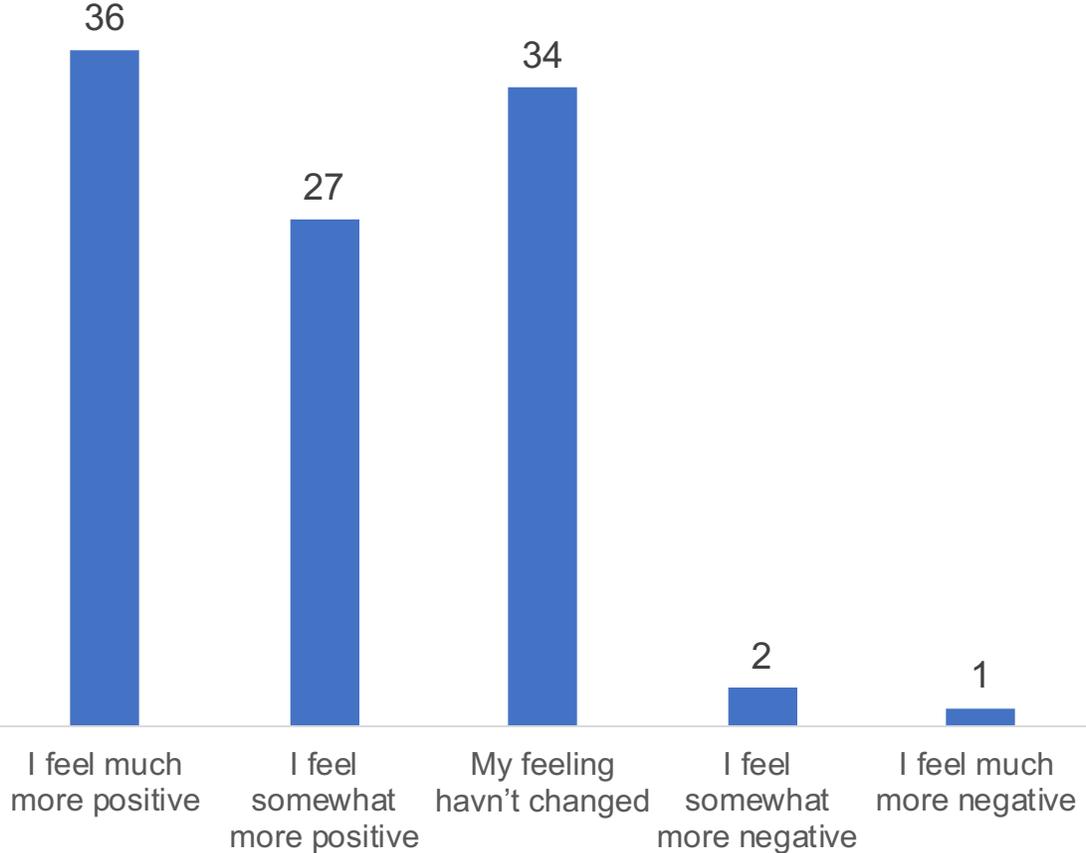
Interestingly, patients are **more aware of the least expensive expanded benefits** (COVID-19 testing and telemedicine visits), than no cost for COVID-19 treatment and quarantined hospitalizations.

Aware of Expanded Payer Benefits due to COVID-19



And besides the obvious humanitarian reasons, disseminating this information is a significant opportunity for payers in driving positive enrollee perceptions

Change in feelings of payer knowing about expanded COVID-19 benefits



(Among those aware of expanded payer benefits)

Wunderman Thompson Health is a full-service marketing agency that inspires ambitious brands to growth. As part of the Wunderman Thompson network, we have access to a deep bench of expertise in everything from initial strategic consulting to the execution of award-winning campaigns. The behavioral strategies outlined in this report represent some of the best and most current thinking in the marketplace today. We have used this approach to help leading healthcare brands identify and implement strategies and campaigns that truly make a difference.

For more information about Wunderman Thompson Health, contact Becky Chidester, CEO at Wunderman Thompson Health at Becky.Chidester@wundermanthompson.com.

For more information about this report, contact Mark Truss, Chief Research Officer at Wunderman Thompson at mark.truss@wundermanthompson.com.



Galileo Research is a psychology-based research and strategy consultancy, harnessing leading edge theory and practice from academic and therapeutic psychology and behavioral economics to deliver greater insight and business understanding to our clients.

We specialize in healthcare research among patients, caregivers and HCPs where our psychology-based approach is particularly valuable for decoding nuanced and emotionally charged decision-making, and for identifying the most potent levers to drive behavior change.

For more information about Galileo, contact Co-Founders and Co-Principals Cathy Lennox (cathy@galileoresearch.com) and Dr. Sarah Fitzharding (sarah@galileoresearch.com).



Appendix

Actual statements used in survey:

Reasons for Increased Level of Concern about Current Condition

HCP Access

I have no/less access to medical care and/or my doctor

I no longer have access/have less access to additional treatment specialists, such as physical therapy, acupuncture, psychologist etc.

I don't know how my doctor is going to manage my routine care while COVID-19 continues

I don't feel comfortable with the way my doctor is going to manage my routine care while COVID-19 continues

My medication requires in-office administration (e.g. an infusion) at a doctor's office or hospital

My medication requires regular doctor / hospital visits for another reason, e.g. regular blood monitoring

Increased COVID-19 Vulnerability

My medication suppresses my immune system

My medication makes me more vulnerable to COVID-19

My condition makes me more at risk from COVID-19

I believe my body isn't strong enough to cope with my current condition and COVID-19

My stress level has increased, which is bad for my condition

Rx Cost

I might not be able to continue to afford my medication(s)

I am worried that I may lose my job (or have already lost my job) and therefore my insurance

Rx Access

My medication might not remain available

Social distancing guidelines are limiting my ability to pick-up my prescriptions

I don't know how to order my prescriptions online/get them delivered

Diet/Exercise Inhibited

I am less able to exercise or stay active because of the restrictions

I am less able to eat healthily under the current circumstances

Online Research

I am doing my own research and it is making me more concerned

Actual statements used in survey:

Reasons for Decreasing Medications

Rx Cost

I am/might become unable to afford my medication

Rx Access

I am nervous to go outside and/or to the store to pick-up my prescription

I don't know how to order my prescriptions online/get them delivered

I am/might become unable to refill my prescription because I couldn't get to the pharmacy

I want to stretch out my medication to make it last longer

I am worried about the continued availability of my medication

Rx increases COVID-19 vulnerability

The medication suppresses my immune system

The medication makes me more vulnerable to COVID-19

HCP Access

I am/might become unable to meet with my healthcare provider so they can write me a refill/new prescription

Treatment Access

The medication requires in-office administration (e.g. an infusion) at a doctor's office or hospital

The medication requires regular doctor/hospital visits for another reason, e.g. regular blood monitoring

Prioritizing Other Conditions

I have to/might have to prioritize another condition(s) over this one

Reduced need

I don't need my medication as much because I am now less active / staying home

Actual statements used in survey:

Reasons for Increasing Medications

Need to Keep Body Strong

I now need/might need to treat my condition more effectively to keep my body strong

Rx Will Protect from COVID-19

I believe my medication will help protect me from COVID-19

Need to Care for Others

I want to be as healthy as possible so that I can take care of others

Rx will Help Manage Stress

My medication helps me manage stress and anxiety

Rx Boosts Immune System

My medication boosts my immune system

Actual statements used in survey:

Why Haven't Used Telemedicine during COVID-19?

Tech Concerns/Issues

I am concerned about technological difficulties

I don't feel well informed enough about how telemedicine works

I don't have a reliable Wi-Fi connection

I don't have a webcam or other means of doing video chat

HCP Still has In-person Visits

My doctor is still seeing patients in their office

HCP Not Offering/Suggesting

My doctor is not offering this service

My doctor hasn't suggested using telemedicine

Insurance Related

My insurance doesn't cover telemedicine

I'm not sure if my insurance covers telemedicine

Don't Like/Think it Will Work

I don't like having conversations over the computer or through video chat

I don't think the doctor would get a full understanding of my condition and how I'm doing

Using Phone/Email/Text

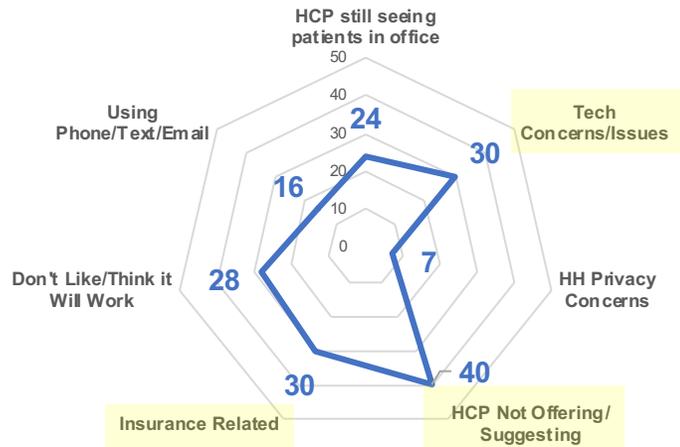
I've been talking to my doctor on the phone

I've been communicating with my doctor through email or text messaging

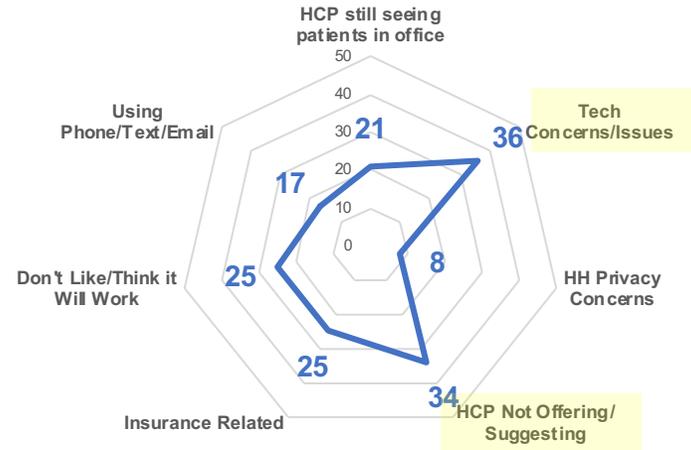
Why not used Telemedicine during COVID-19?

(Among those who did have a reason to see an HCP during COVID-19)

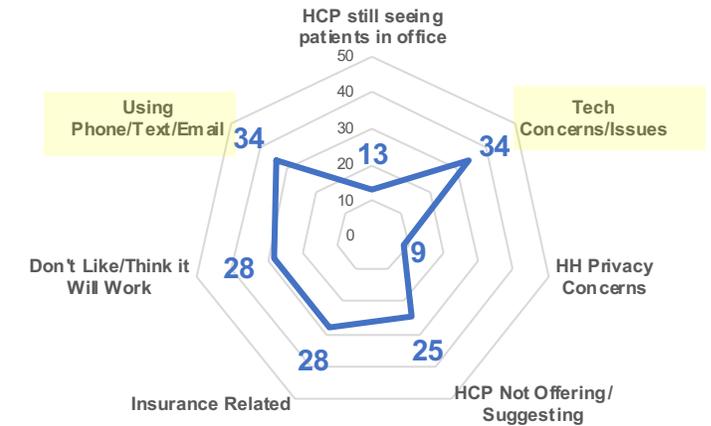
Anxiety & Depression



Lung Health



Female Health

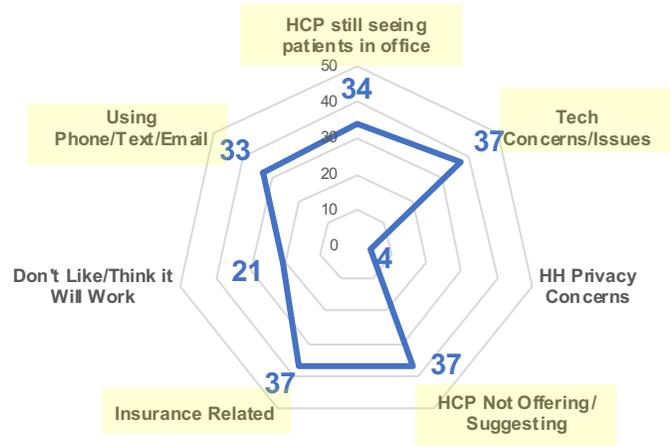


Caution: Small sample size

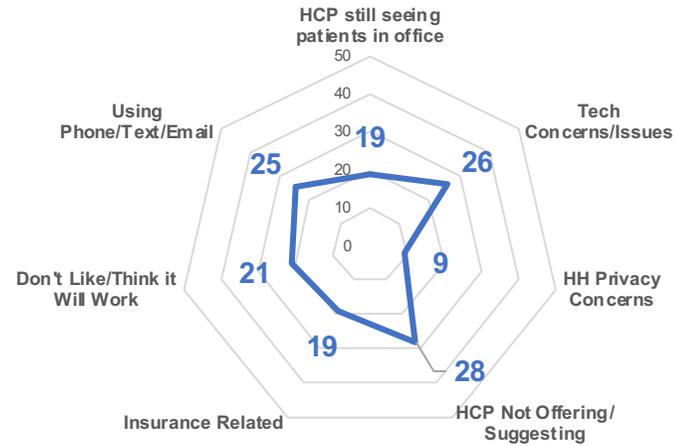
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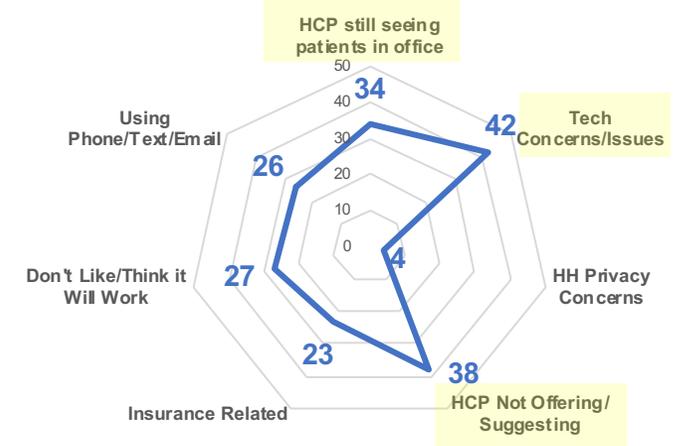
Diabetes (T2D)



Obesity



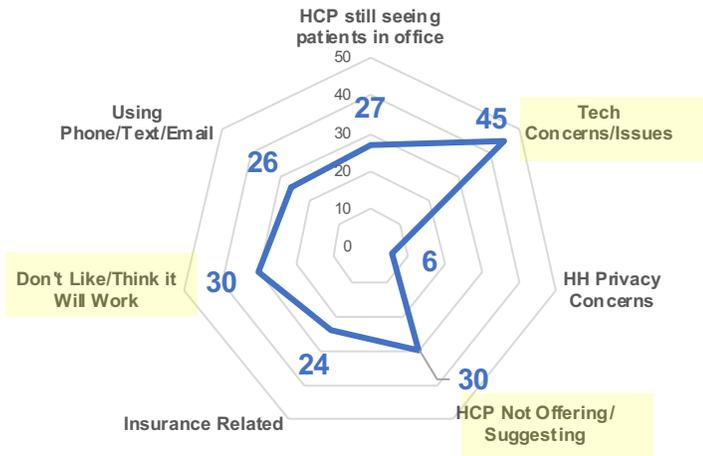
CV



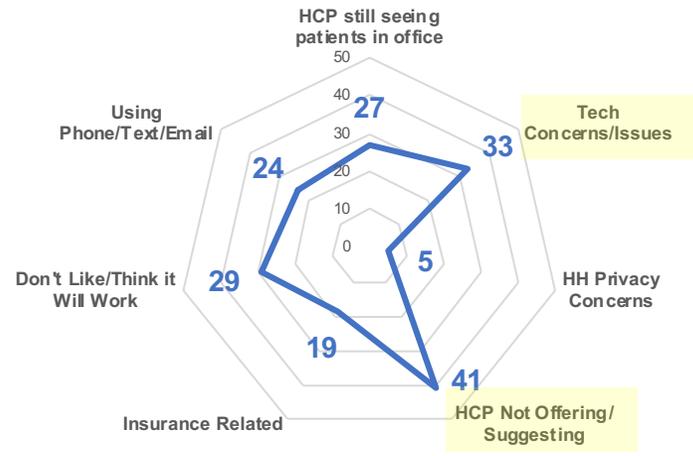
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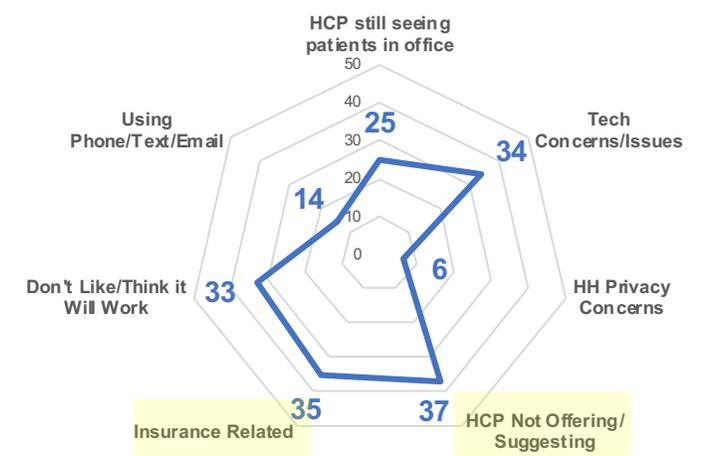
Pain



Autoimmune

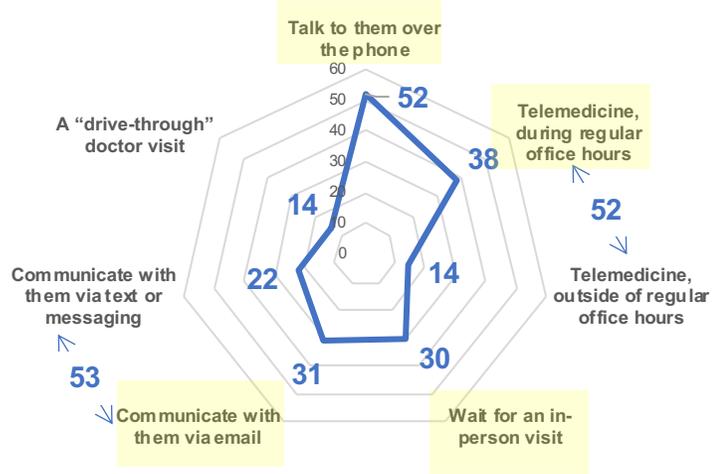


CNS

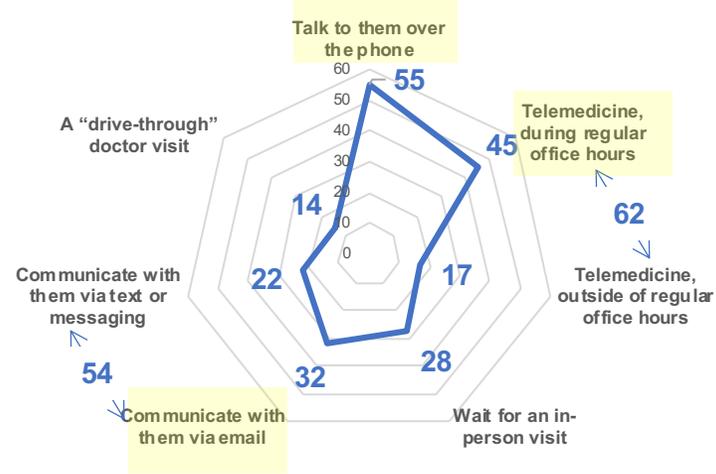


Preferred Methods to Engage with HCPs during COVID-19

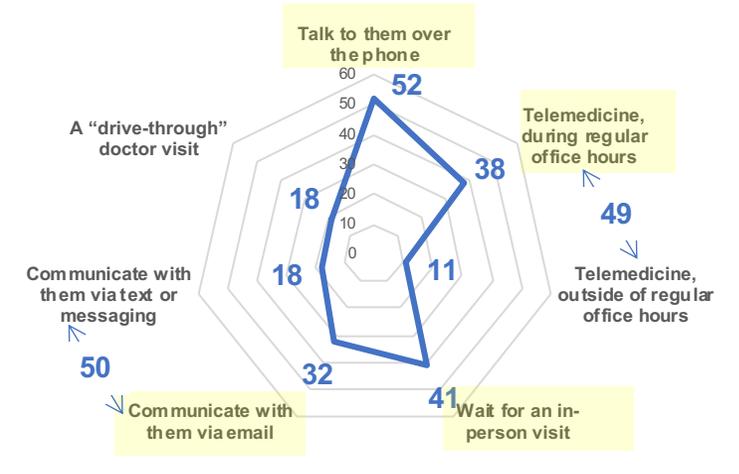
Anxiety & Depression



Lung Health

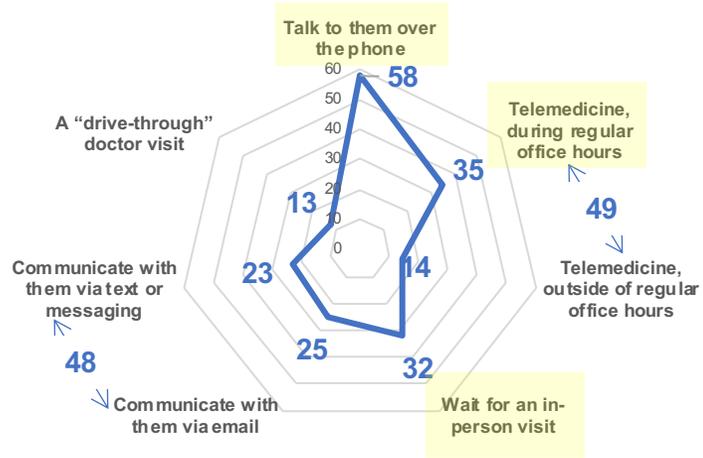


Female Health

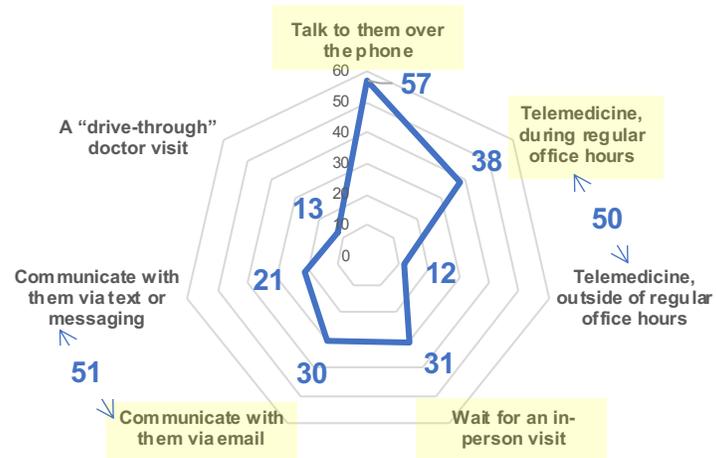


Preferred Methods to Engage with HCPs during COVID-19

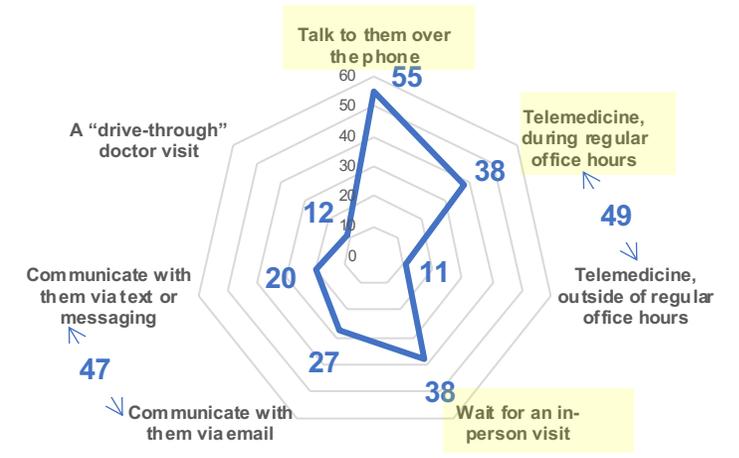
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Obesity

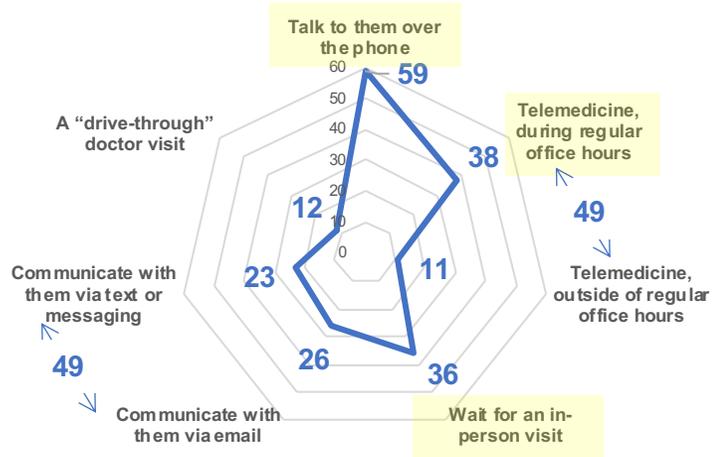


CV

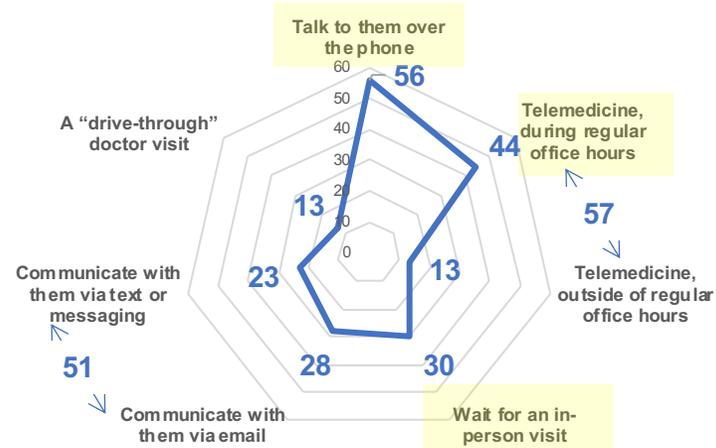


Preferred Methods to Engage with HCPs during COVID-19

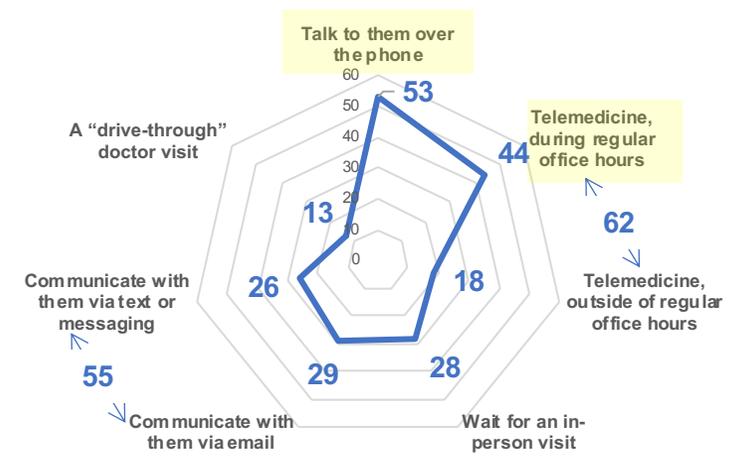
Pain



Autoimmune



CNS



Thank you!



+ WUNDERMAN
THOMPSON