



COVID-19 Oncology Survey

April 2020

Background and Method

Luminas conducted an online survey among Oncologists to uncover the impact that the COVID-19 outbreak has had to their

- Practice
- Patient management
- Treatment patterns

Field Dates

April 13-15, 2020

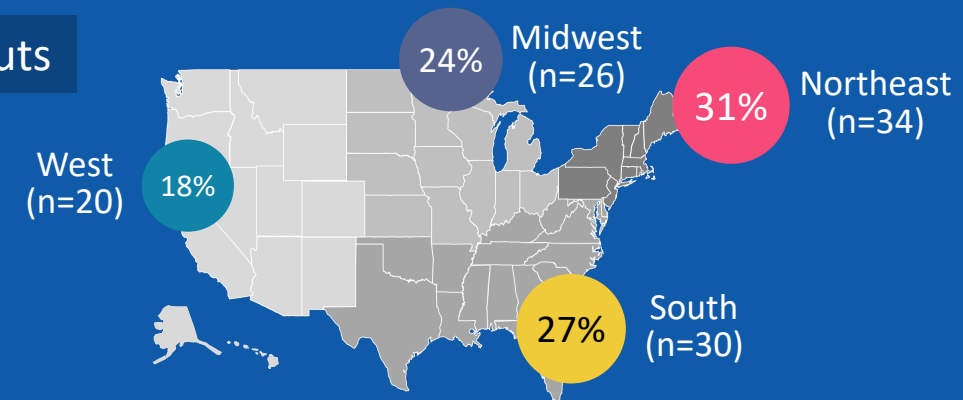


Total Sample

n=110 U.S. Oncologists (tumors vary)



Region Breakouts



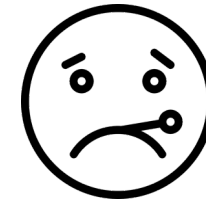
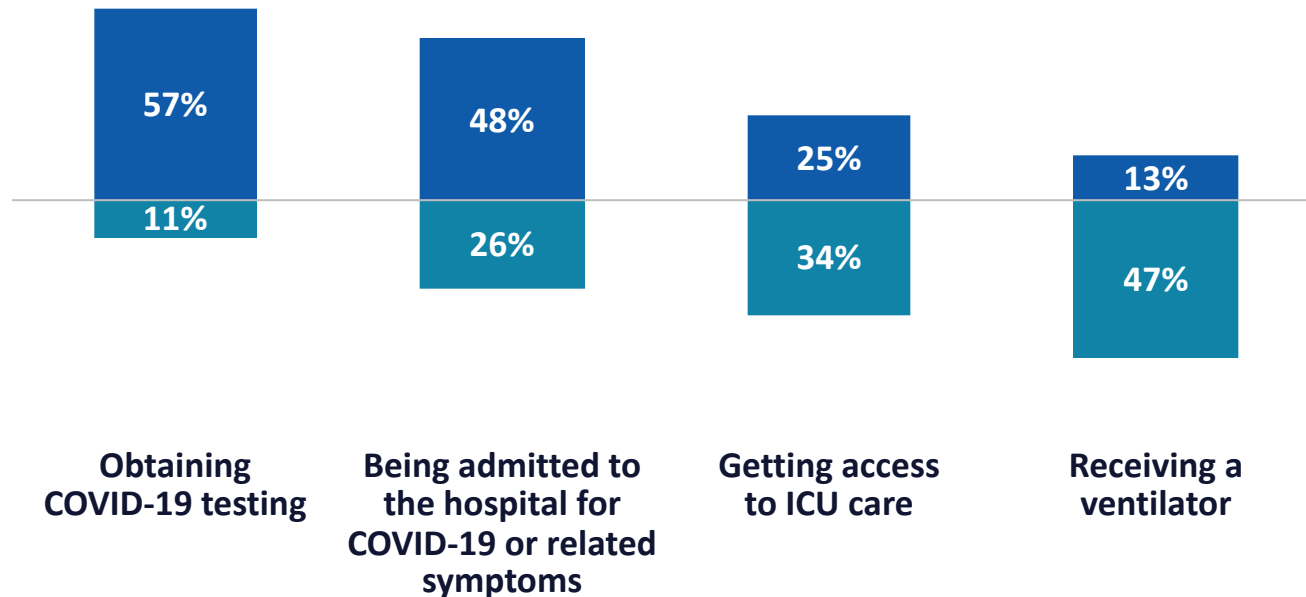
Cancer patients seen to have an advantage to COVID-19 testing and admissions but disadvantage for advanced care

Access to COVID-19 Care For Cancer Patients Compared to Non-Cancer Patients

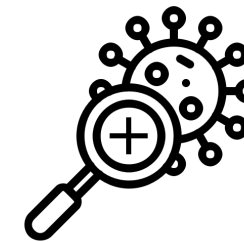
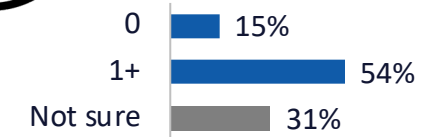
Cancer Patients Will be at...

Advantage —

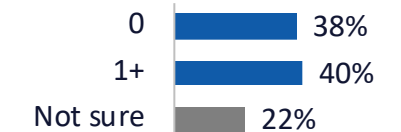
Disadvantage —



10 Patients (mean)
Had COVID-19 symptoms



4 Patients (mean)
Diagnosed with COVID-19



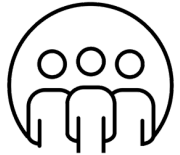
BASE: ALL QUALIFIED RESPONDENTS (n=110)

Q210 Compared to non-cancer patients, do you think cancer patients will have an advantage or disadvantage for each of the following? (Big advantage, slight advantage, no different, slight disadvantage, big disadvantage)

BASE: ALL QUALIFIED RESPONDENTS (n=110)

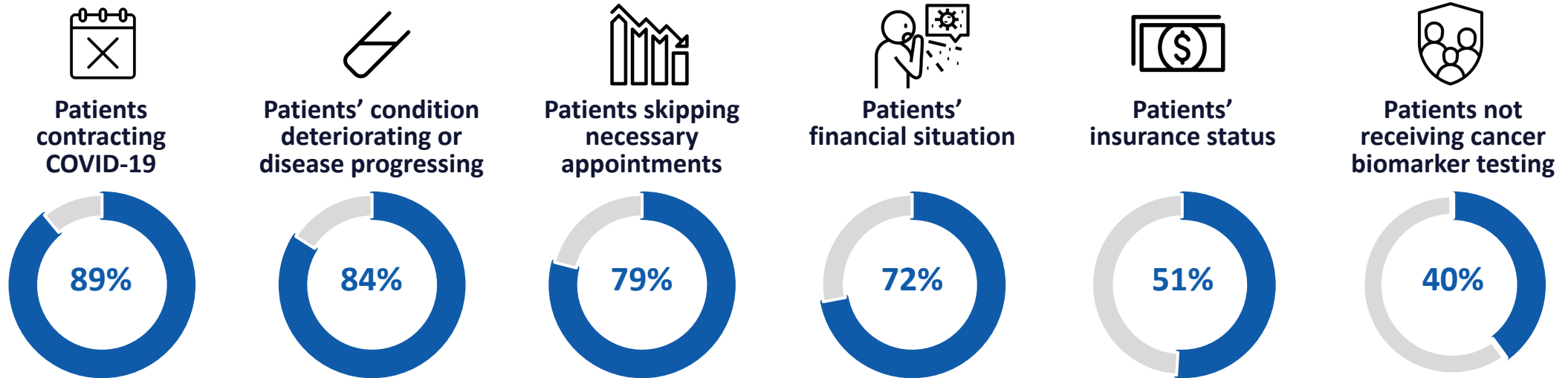
Q220 How many, if any, of your patients have experienced the following?

Oncologists are very concerned about cancer patients skipping necessary appointments



Level of Concern for Patients

% At Least Somewhat Concerned (Top 2 Box %)

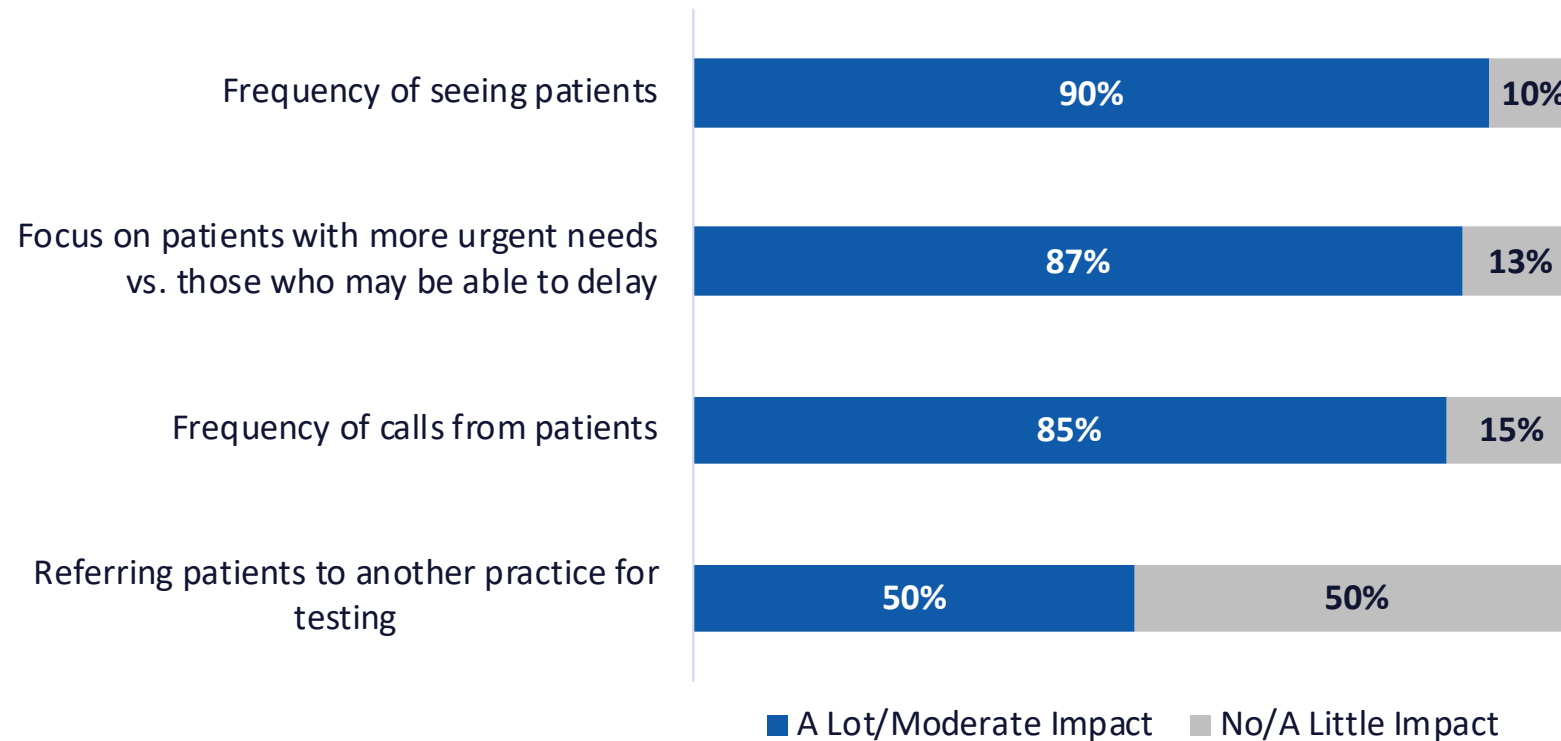


BASE: ALL QUALIFIED RESPONDENTS (n=110)

Q215 How concerned, if at all, are you about each of the following aspects of your patients' care? (not at all concerned, slightly concerned, somewhat concerned, very concerned)

Most Oncologists prioritize patients with more urgent needs

Impact of COVID-19 on Practice



56% of Oncs have changed their practices to provide patients treatments that protect against infections that I do not typically prescribe (e.g. antibiotics, GCF)

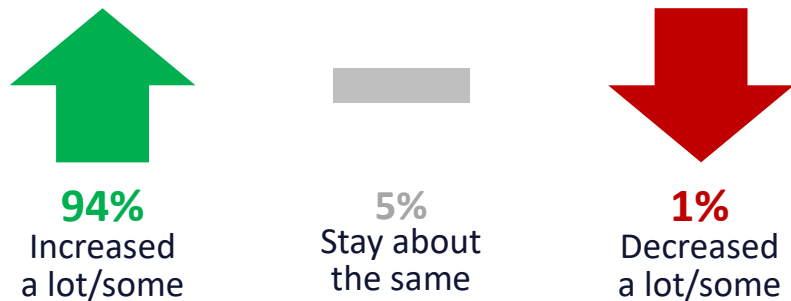
BASE: ALL QUALIFIED RESPONDENTS (n=110)

Q315 Overall, how much has the COVID-19 outbreak impacted the following aspects of your practice? (a lot of impact, moderate impact, a little impact, no impact)

Q500 How much do you agree or disagree with each of the following statements with regards to the COVID-19 outbreak? (strongly disagree, somewhat disagree, somewhat agree, strongly agree)

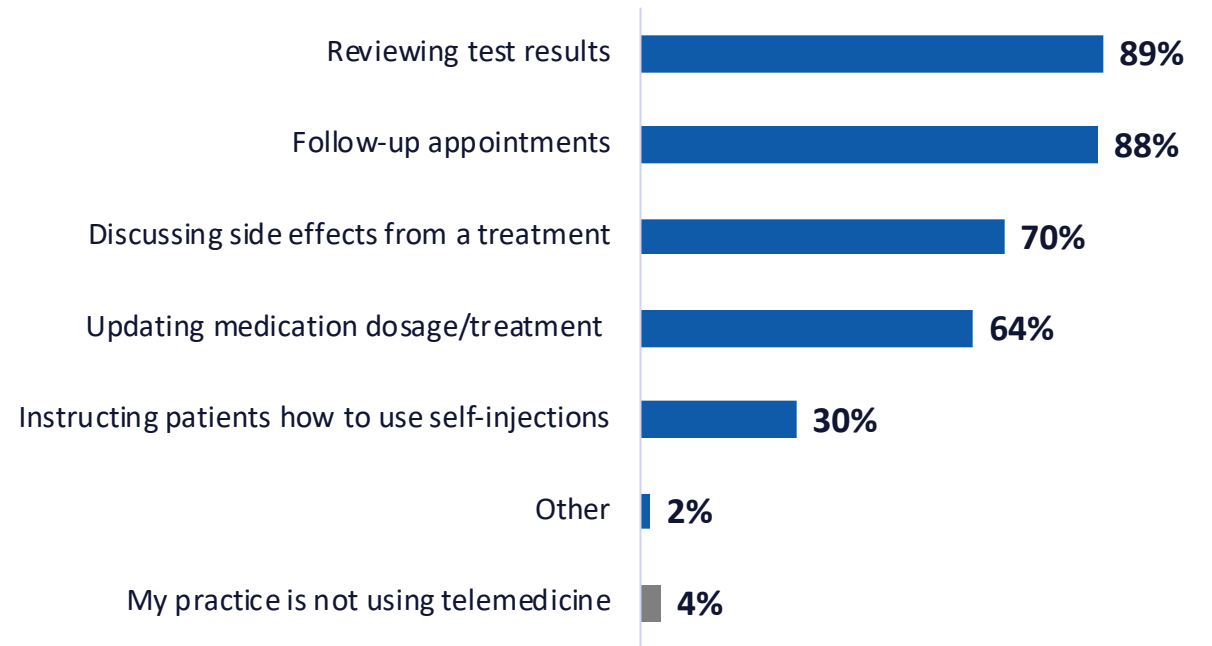
Telemedicine use has drastically increased among oncologists

Change in Telemedicine Use Since COVID-19 Outbreak



82% of Oncs expect to continue telemedicine in the future

Telemedicine Activities



86% of Oncs would use a mobile device for telemedicine appointments after patient discharge

BASE: ALL QUALIFIED RESPONDENTS (n=110)

Q320 How much has your practice's use of telemedicine changed compared to before the COVID-19 outbreak?

Q325 In your practice, in which of the following ways are you using telemedicine with patients? Please select all that apply.

Q500 How much do you agree or disagree with each of the following statements with regards to the COVID-19 outbreak? (strongly disagree, somewhat disagree, somewhat agree, strongly agree)

Oncologists find work-arounds for providing infusion/ injection therapies; a quarter identified at-home solutions

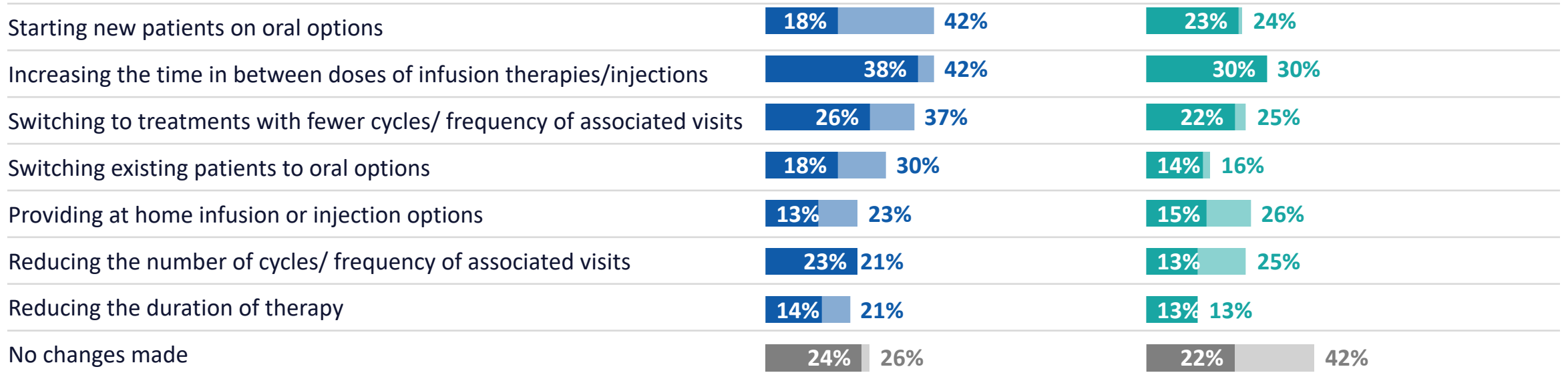
Impact of COVID-19 on Infusions and Injection Therapies



% Infusion



% Injection



■ Have Done for Majority of Pts ■ Have Done Since Outbreak ■ Have Done for Majority of Pts ■ Have Done Since Outbreak

BASE: ALL QUALIFIED RESPONDENTS (n=110)

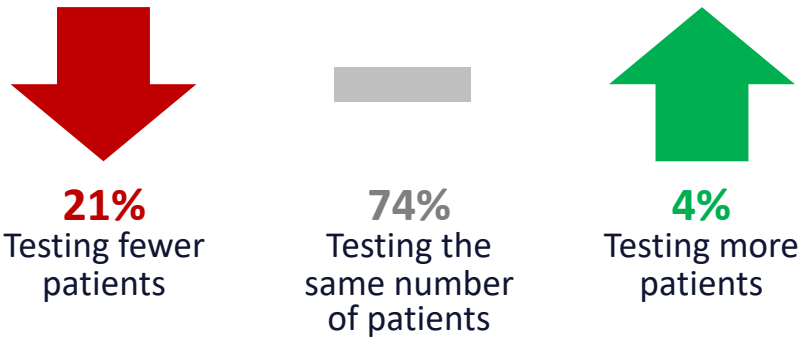
Q400 Please think about your patients who are or would be treated with infusion therapy or HCP-administered injections. Since the outbreak of COVID-19, which of the following actions have you taken? Please select all that apply in each column.

BASE: ALL QUALIFIED RESPONDENTS (n=110)

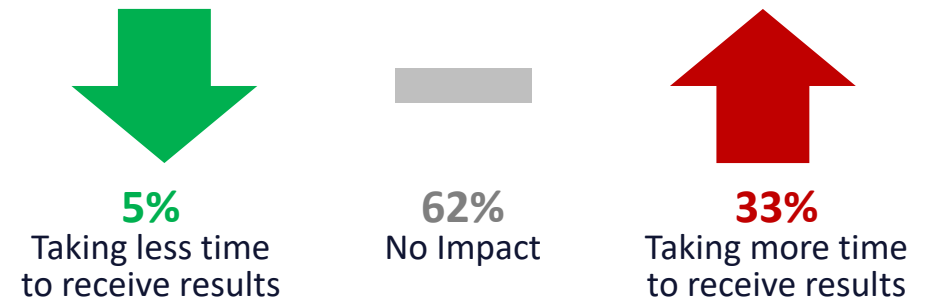
Q410 Which, if any, of these actions are you taking for the majority of your relevant patients? Please select all that apply.

Many oncologists state COVID-19 has not impacted biomarker testing

Impact of COVID-19 on Biomarker Testing



Change in Amount of Time to Receive Biomarker Testing Results



BASE: AMONG RESPONDENTS WHO BIOMARKER TEST (n=98)

Q600 How has the frequency of biomarker testing for patients (e.g., BRCA, HRD, PD-L1) been impacted?

Q605 How has the time it takes to receive results of biomarker testing for patients (e.g., BRCA, HRD, PD-L1) been impacted?

Oncologists seek support for themselves and their patients

Ways Pharmaceutical Manufacturers Can Provide Support



Deliver Patient Assistance

“Making prior authorization process easier during this time.”

“Continue to provide samples (as some patients have lost insurance or have trouble with medication costs).”

“Provide financial assistance if needed for patients who might lose insurance.”



Ensure Drug Supply

“Ensure drug pipeline is as robust as possible”

“Improved communication about drug supply issues, maintaining appropriate supply”

“Keep the supply chain of oncology medications intact and reliable”



Communicate Conscientiously

“Only send important ground-breaking information.”

“Be conscious of our busy schedules and only provide critical update for currently available drugs.”

“Be available for me and my staff when we reach out with issues. I do not need to be bothered at this time with sales calls.”

27% of Oncs have experienced a shortage of cancer medications

BASE: ALL QUALIFIED RESPONDENTS (n=110)

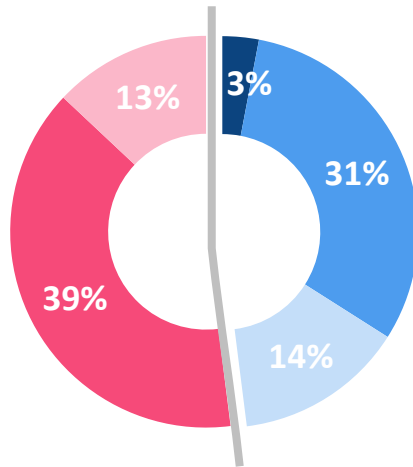
Q700 How can pharmaceutical manufacturers best support you during this time? Please be as specific as possible. This can include areas around drug supply, communications, patient resources, etc.

One third of oncologists continue to actively engage with reps

Current State of Sales Rep Interactions

52% Does Not See Reps

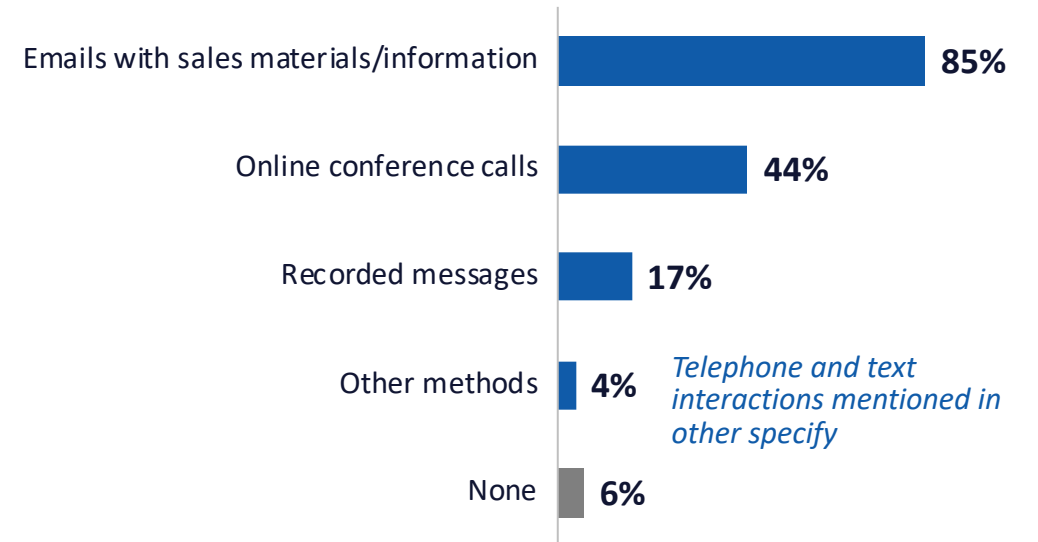
- We never allowed interactions with sales reps
- We are not having any sales rep interactions



48% Sees Reps

- We are still seeing sales reps in-person
- We are interacting with reps virtually (email, phone, online)
- We are limiting interactions with reps to an as needed basis only

Type of Sales Rep Interactions that Have Increased



BASE: ALL QUALIFIED RESPONDENTS (n=110)

Q710 Which of the following best describes how your practice is dealing with pharmaceutical sales representatives?

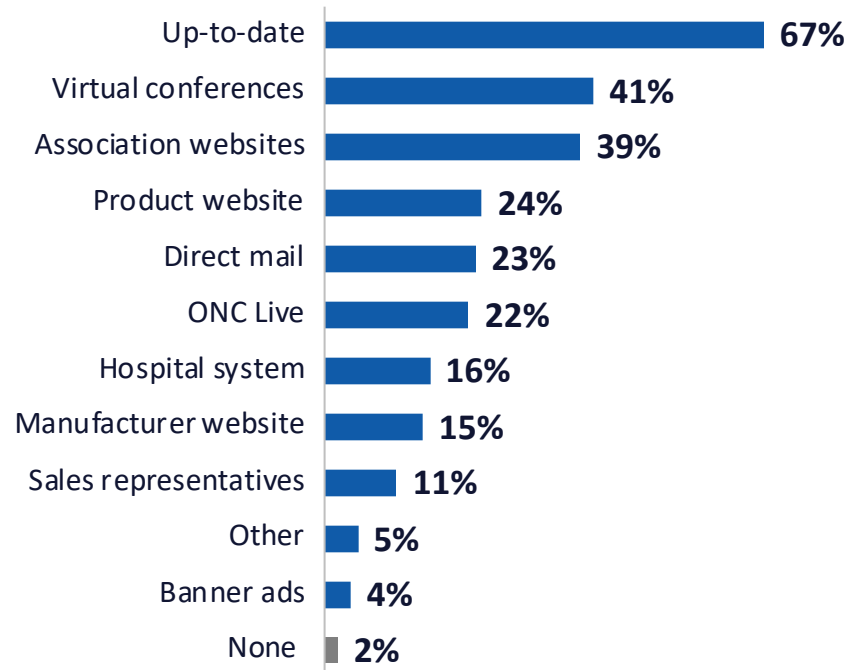
BASE: SEES SALES REPS (n=52)

Q715 Which of the following types of online interaction with sales reps have increased in your practice due to the COVID-19 outbreak? Please select all that apply.

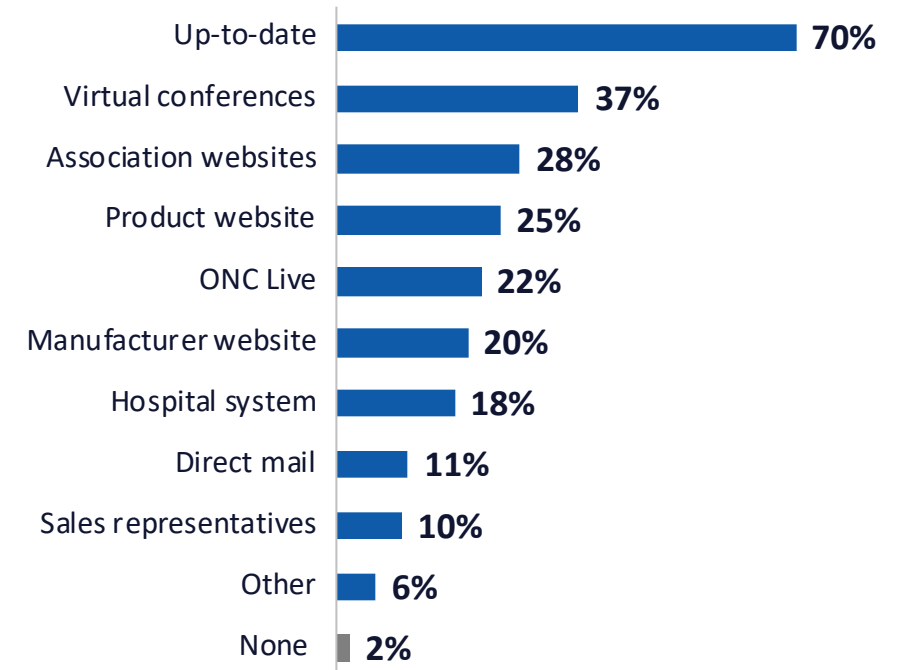
Up-to-Date is the primary resource oncologists use to stay current



Resources Used to Remain Updated on Products



Resources Used to Obtain COVID-19 Guidance



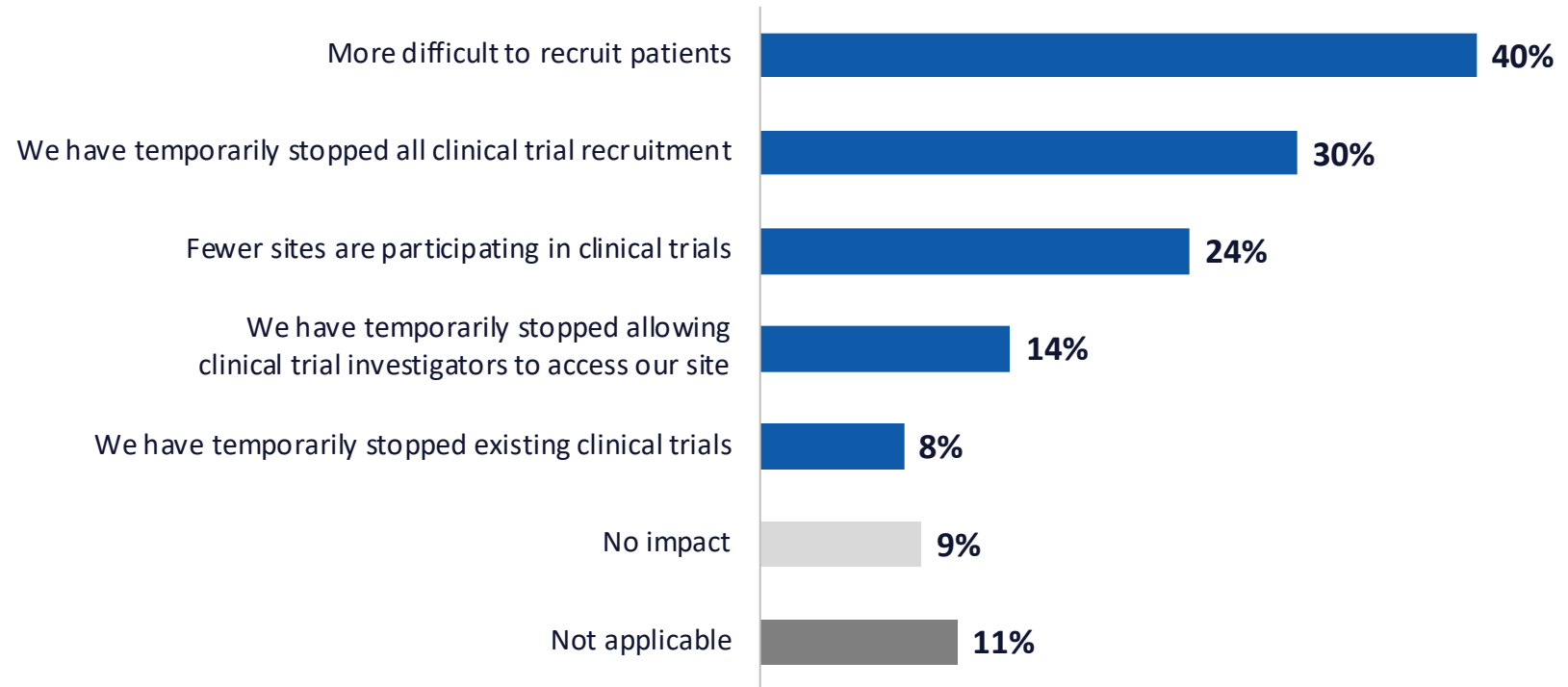
BASE: ALL QUALIFIED RESPONDENTS (n=110)

Q720 What resources are you using to remain up to date on healthcare products and product launches? Please select all that apply.

Q725 What resources are you using to obtain guidance on managing your patients and selecting treatments during this time? Please select all that apply.

Access and participation in clinical trials has slowed

Impact of COVID-19 on Clinical Trials

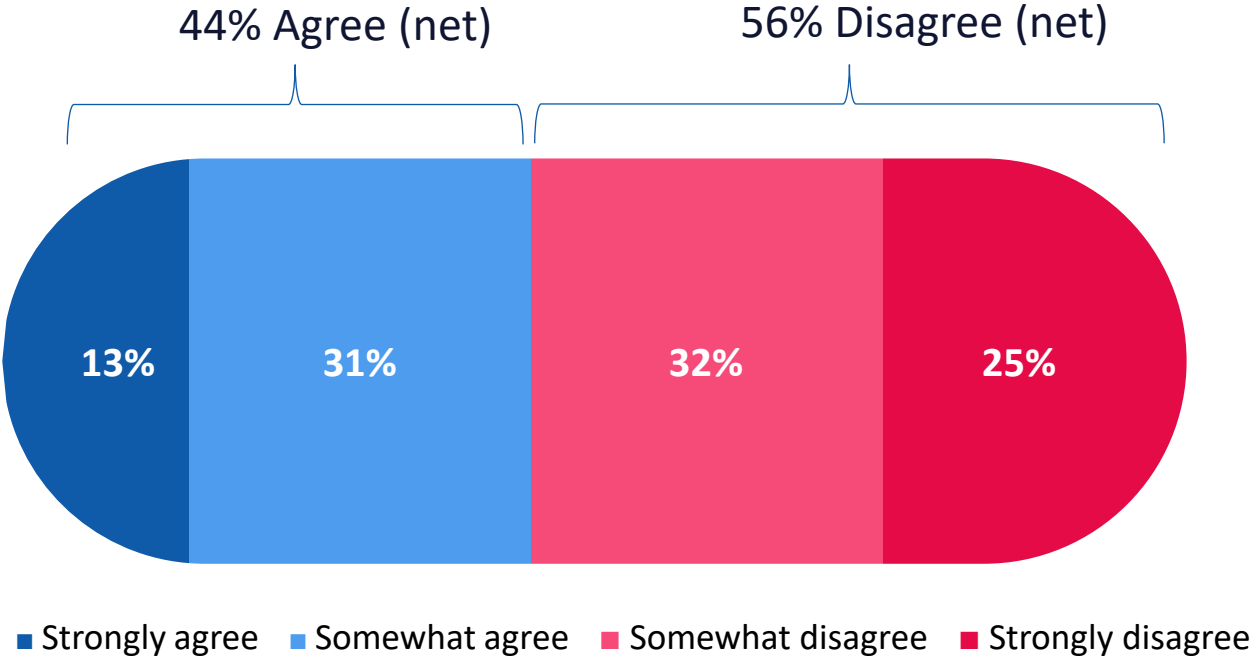


BASE: ALL QUALIFIED RESPONDENTS (n=110)

Q800 What impact, if any, has the COVID-19 outbreak had on clinical trials? Please select all that apply.

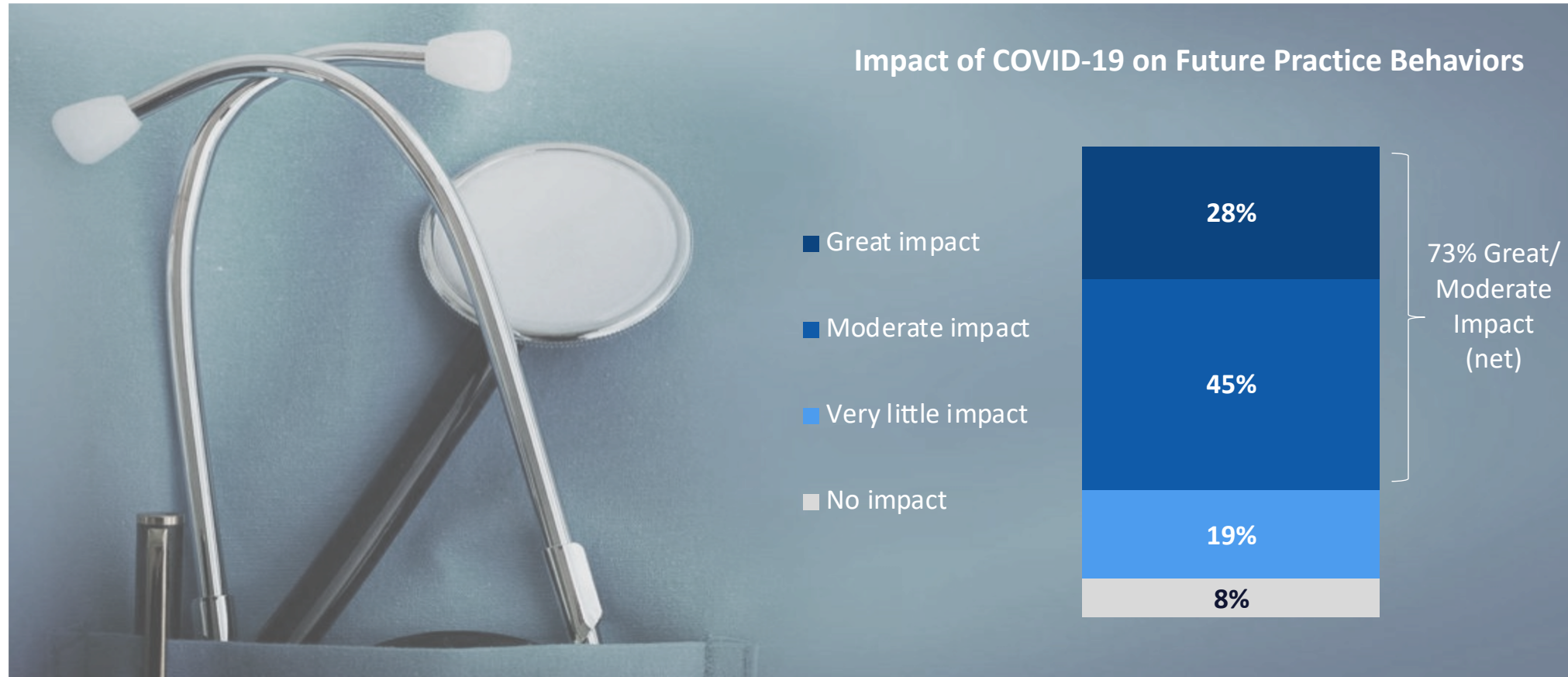
Oncologists are divided on the use hydroxychloroquine/ chloroquine for COVID-19 prior to trial

I believe that hydroxychloroquine/chloroquine should be used for treatment of COVID-19 prior to testing in a randomized clinical trial.



BASE: ALL QUALIFIED RESPONDENTS (n=110)
Q910 How much do you agree or disagree with the following statement?
13

Most oncologists indicate that the COVID-19 outbreak will impact how they practice in the future



BASE: ALL QUALIFIED RESPONDENTS (n=110)

Q900 How much of an impact, if any, has the COVID-19 outbreak changed how you will practice medicine in the future?

Illuminated by...



L u m i n a s

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