

# COVID-19 Briefing Series

## European HCP Perspectives on the Impact of COVID-19

*The COVID-19 pandemic continues to have an unprecedented impact on our lives and is disrupting businesses as it spreads worldwide. The social distancing measures that are critically important to address the pandemic present new challenges with patient recruitment for clinical trials<sup>1</sup>, market research, and drug launches<sup>2</sup>.*

As the EU5 countries comprise some of the most important pharmaceutical markets, and with Italy, Spain and France includes countries which have been impacted significantly from COVID-19, Trinity aimed to understand the impact on HCP engagement with Market Research. Trinity has issued a similar report on the impact of COVID-19 in the US:

<https://trinitylifesciences.com/u-s-physicians-still-willing-to-participate-in-healthcare-market-research-during-coronavirus-pandemic/>.

Reflecting on the situation and the findings of the report, Alexander Fink, Trinity's Managing Partner for Europe notes:

*“Many companies might be concerned about the feasibility to conduct primary market research now. There are concerns that physicians might be distracted from other priorities and hence not willing to participate in primary market research. However, this survey found that HCP’s remain available to complete market research depending on their role”*

**Background:** Trinity along with Toluna, a leading provider of intelligence for healthcare, consumer and other industries, surveyed 596 healthcare providers across United Kingdom (122), Germany (94), France (129), Spain (104) and Italy (147) to understand how COVID-19 has impacted their engagement in market research activities. The research sample included 528 physicians across 34 specialties, 6 nurses, 22 physician assistants and 40 health care providers in other fields (pharmacists, dentists, etc.). The survey was fielded between March 27th and April 8th, 2020.

**This research is intended to provide insights for life science companies to help them navigate these uncertain times.**

1. Coronavirus led one biotech to pause a key trial, as more begin to follow; <https://www.biopharmadive.com/news/coronavirus-biotech-provention-trial-pause-diabetes/574336/>
2. Drug launches across Europe will be affected by coronavirus- <http://www.pharmafile.com/news/544171/drug-launches-across-europe-will-be-affected-coronavirus>

## HCPs continue to participate in Market Research

Most HCPs report similar or increased availability to engage in market research during the season of COVID-19

When surveyed on their level of engagement and availability to participate in MR, 43% of HCPs indicate an increase in availability, and another 34% note their availability was the same as before the outbreak. EU HCPs estimate, on average, completing about one MR study in the 2 weeks preceding the survey, which was fielded between March 27th and April 8th, 2020.



Figure 1

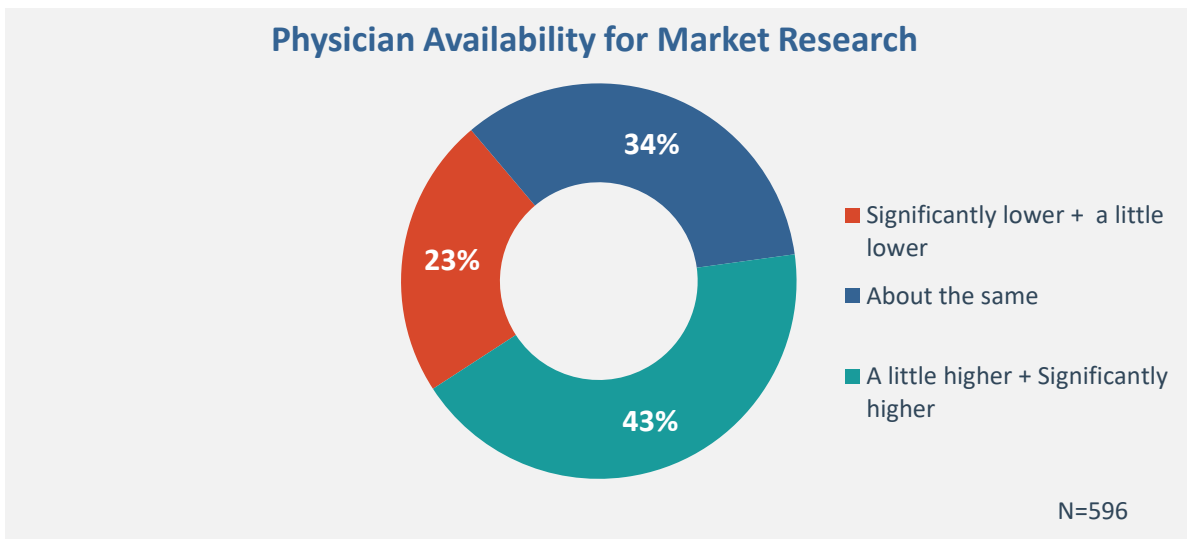
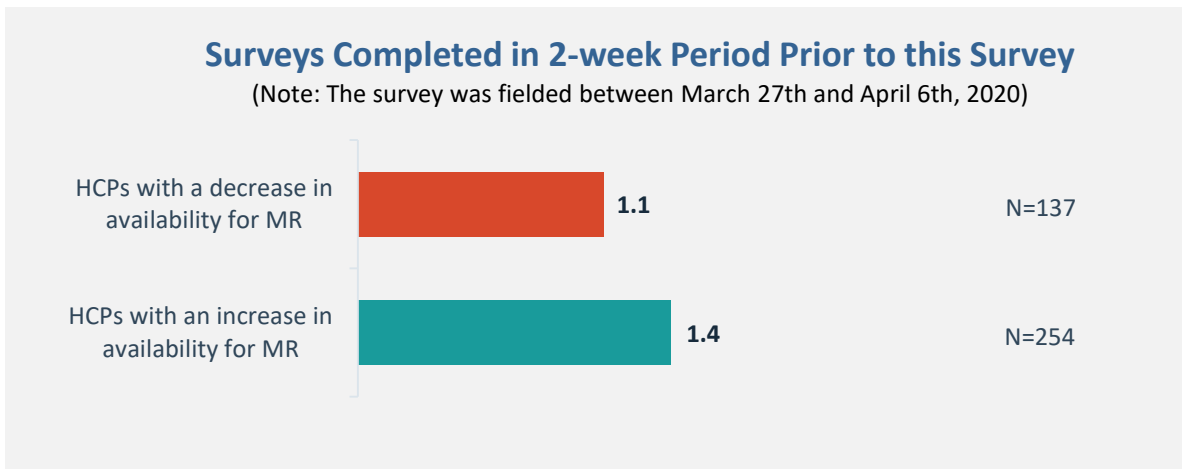


Figure 2



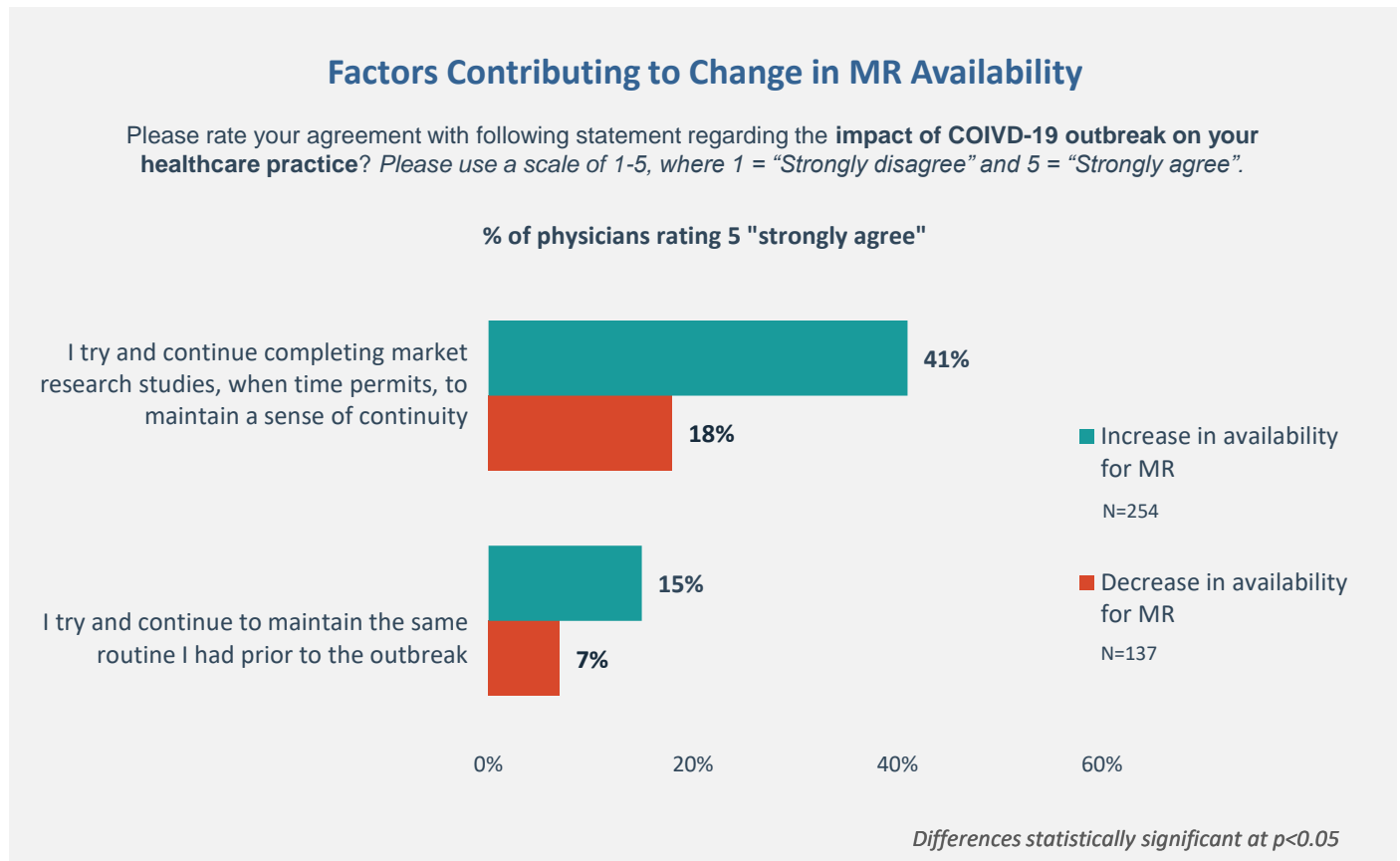
## Ongoing and Anticipated Changes Impact Availability

When time is available, HCPs want to participate in MR to maintain a sense of normalcy in their schedule

HCPs who report an increase in availability for MR are significantly more likely to agree that they would participate, when time permits, for continuity than physicians who note a decrease in availability (41% vs. 18% strongly agree, respectively).



Figure 3



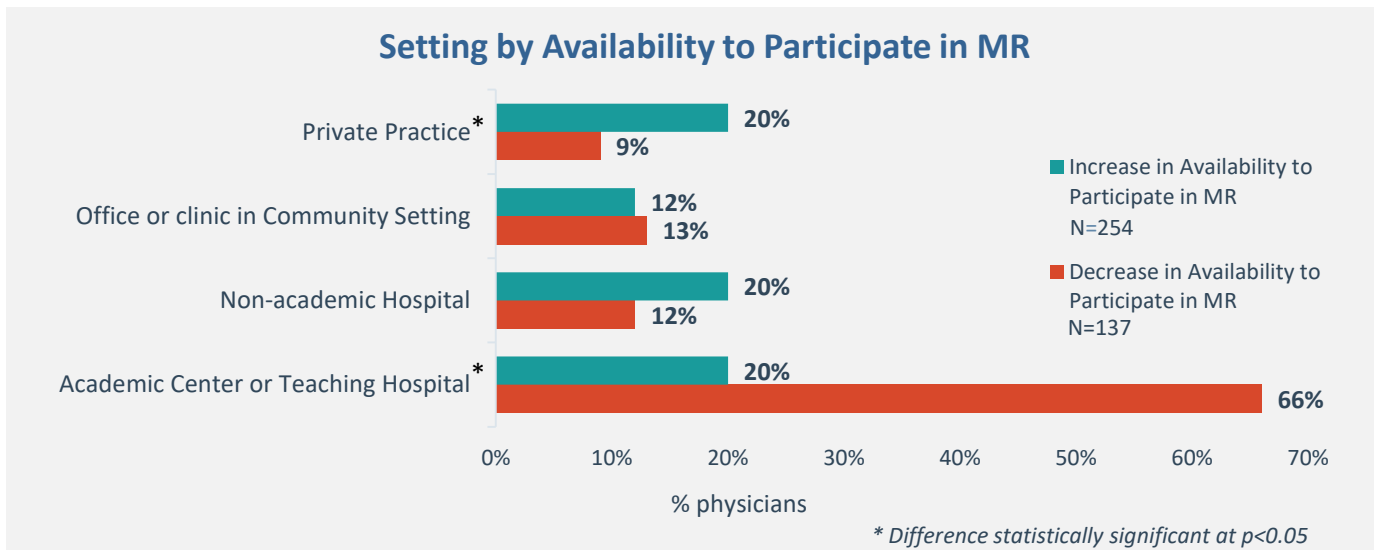
## Demographic Difference Impact Availability

### HCPs in private practice have greater availability for MR as they see fewer on-site patients

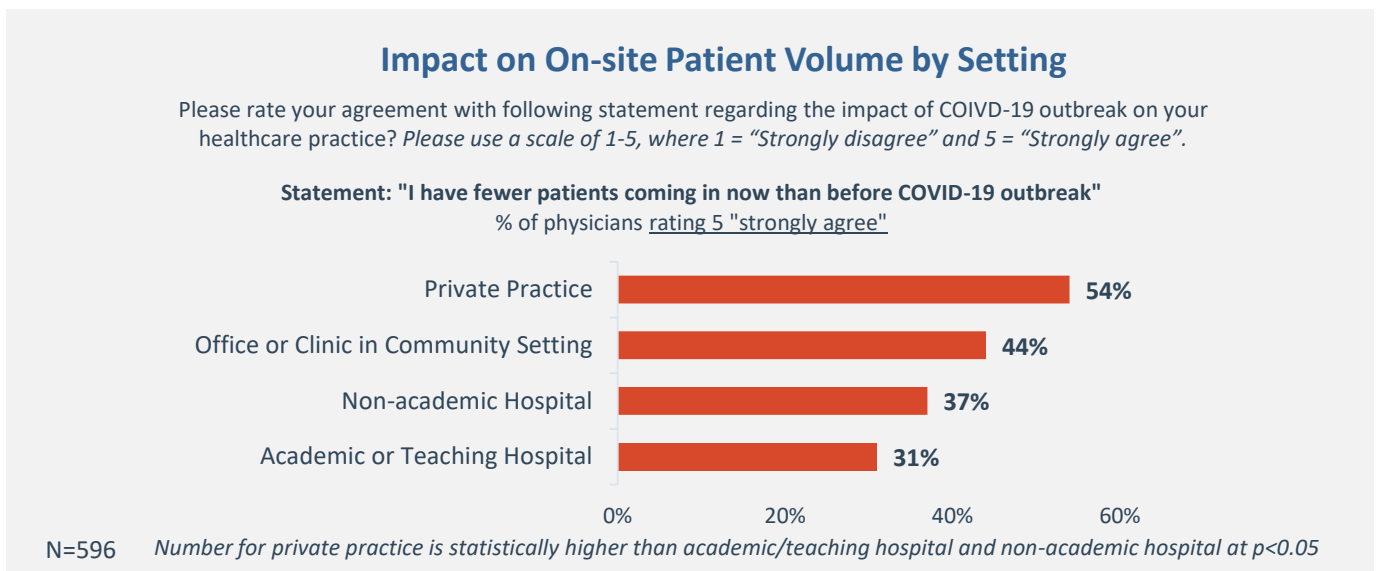
20% of HCPs indicate they have an increase in availability to participate in MR practice in the private setting vs. 9% of HCPs who report decreased availability. Conversely, 66% of HCPs reported a decrease in availability practice in the academic setting vs. 47% who report an increase in availability. These trends appear to be driven partially by a greater proportion of private practice physicians experiencing a decrease in on-site patient volume.



**Figure 4**



**Figure 5**



## Demographic Difference Impact Availability

### Physicians on the frontline of treatment anticipate committing more time to managing patients with COVID-19 in next few weeks

Physicians (MD) were segmented based on their role in the frontline management of COVID-19. These specialties included Emergency Medicine, PCPs, Internal Medicine, Hospitalists, Critical Care, Infectious Disease, and Pulmonologists.

Although minimal differences in current availability for physician specialties aligned with frontline COVID management was seen, specialties involved in frontline management anticipate committing more time to management of COVID patients in coming weeks. Therefore, future availability for MR may be impacted.



Figure 6

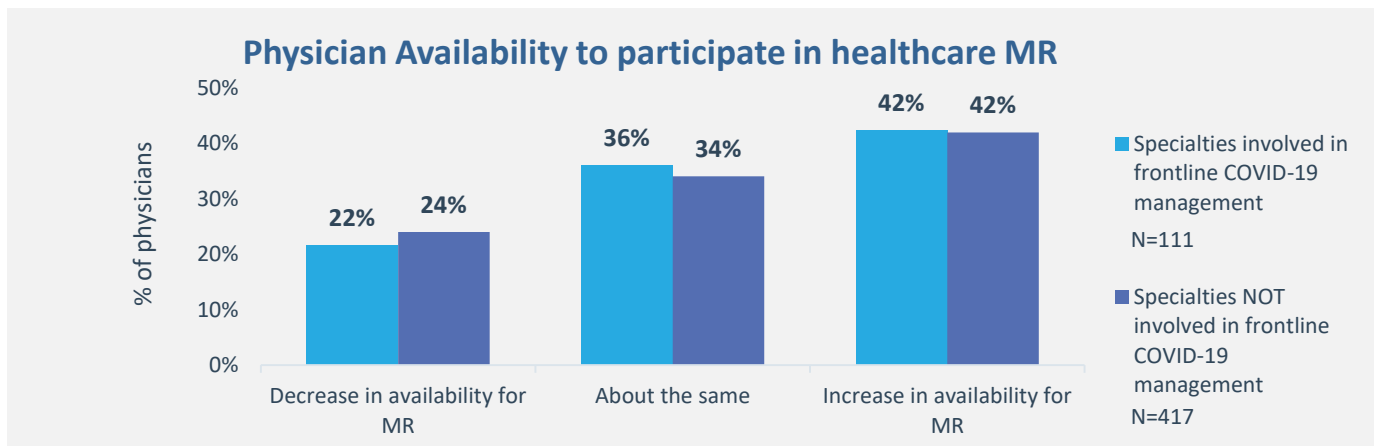
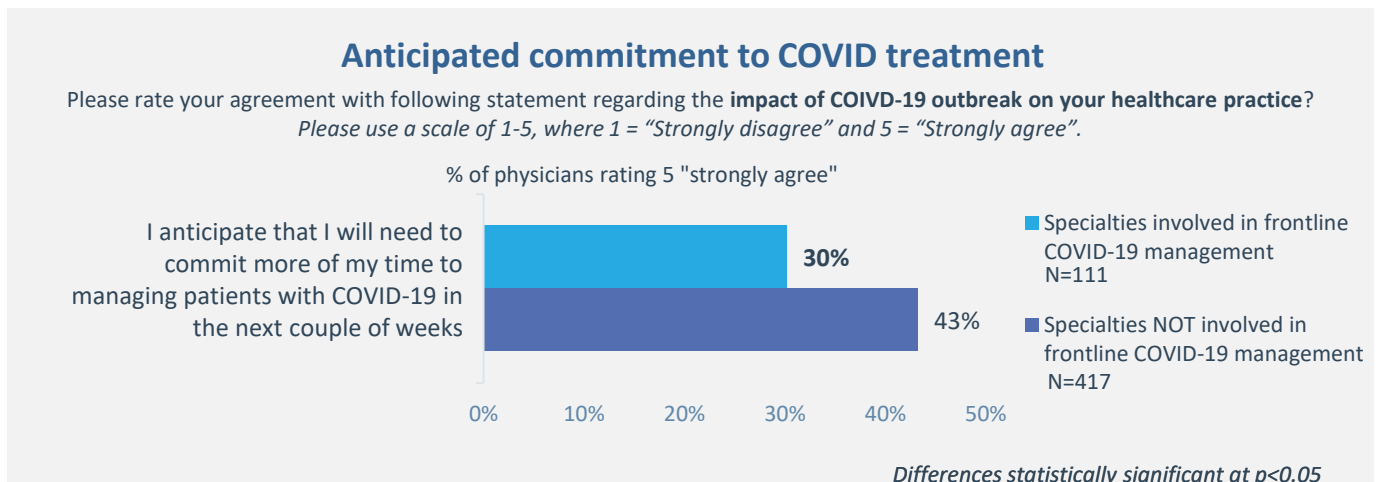


Figure 7



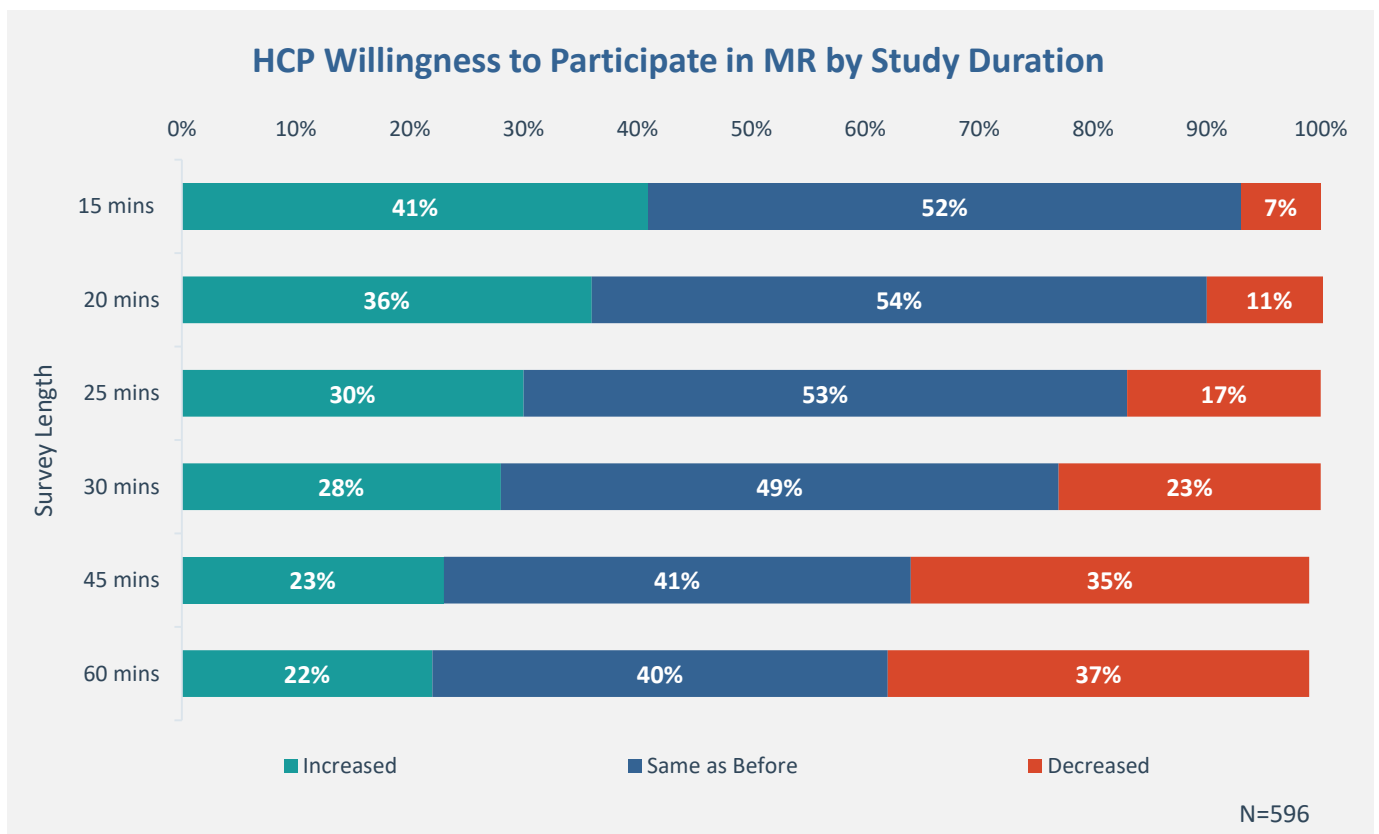
## Willingness to Participate in Shorter Surveys is Strong

Duration of studies does impact HCP willingness to participate; however, no disruption in interest was noted for shorter studies

At least 20% of HCPs indicate a willingness to participate in MR studies for up to 60 minutes. However, the proportion of HCPs who report increased willingness to participate grows considerably for shorter surveys (41% report an increase in willingness to participate in 15-minute surveys). This suggests that although interest in research remains strong and surveys of all lengths can be completed, the outbreak is impacting bandwidth for and willingness to commit to longer studies.



Figure 8



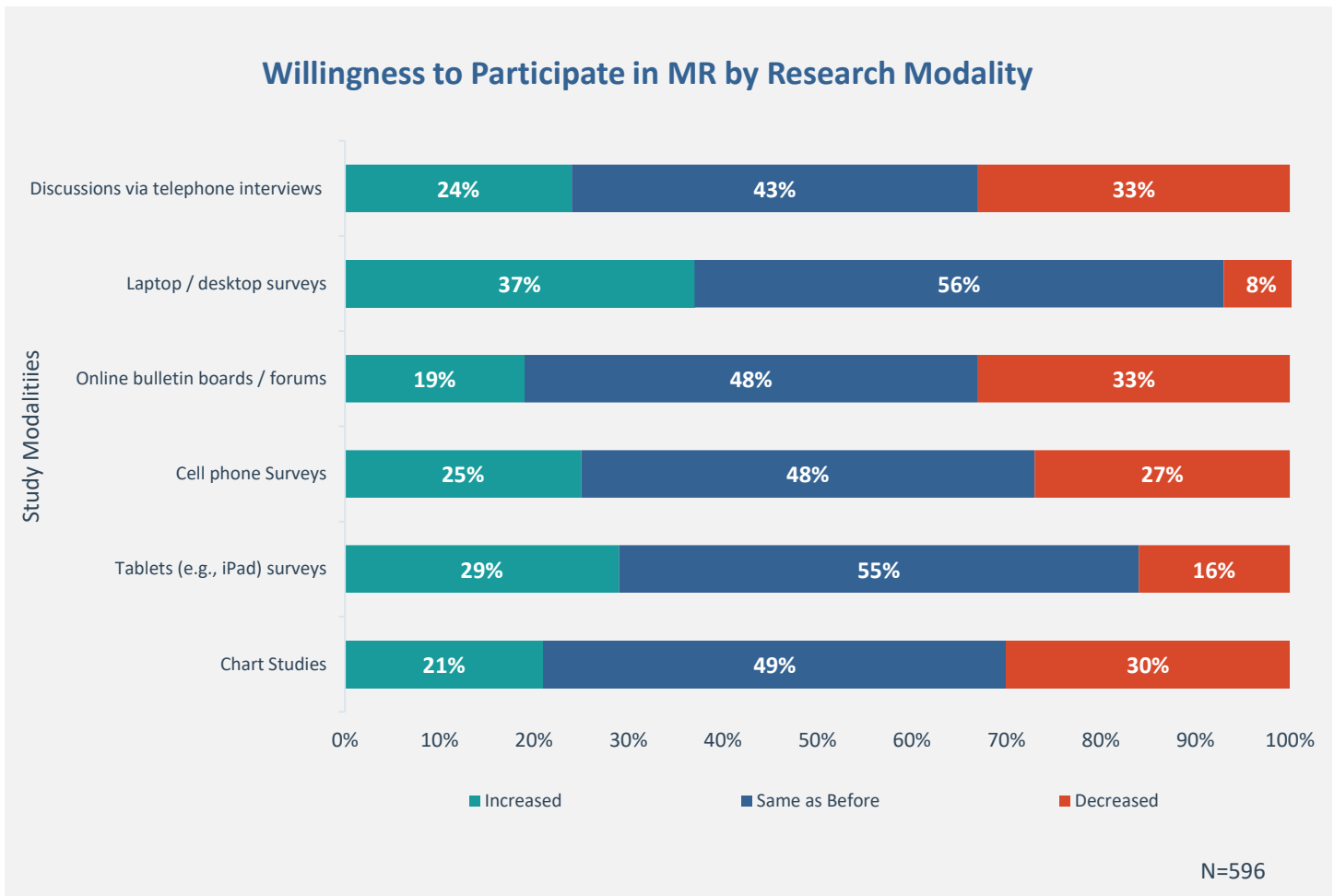
## Willingness to Participate Across Modalities is High

Across modalities, a majority of HCPs are extremely willing to continue their participation in MR

About two-thirds of HCPs report that their willingness to participate in online surveys has not been negatively impacted.



Figure 9



## Looking Ahead

Our observations indicate an overall appetite for market research is undiminished, despite the unprecedented impact on business and personal challenges. There are certain specialties and settings where availability might be a little lower. In summary, we observe that:

- Research participation and availability remains high during this COVID-19 outbreak
- HCP engagement is driven by greater flexibility as fewer patients are managed on-site, notably for private practices, and as HCPs try to participate in MR to maintain a sense of normalcy if time permits
- Private practices and specialties not on the frontline of COVID-19 management are associated with greater anticipated availability for MR. Willingness to participate remains robust regardless of study type and duration. However, longer studies might limit interest levels over time as HCPs grow busier with patient management
- The findings and trends were consistent across all countries surveyed

*“The impact of COVID and widespread social distancing in Europe has significantly impacted scheduled patient visits. As a result, HCPs, particularly those in private practice and not yet on the frontline of COVID management may find themselves with a bit more flexibility to complete MR when time permits,” said Steve Orlick, Sr. VP and Team Lead for Healthcare for Toluna.*

Trinity and Toluna remain cognizant of the evolving situation and continue to monitor the COVID-19 outbreak. We are continually reviewing our projects to ensure the current situation doesn't impact the goals of the research as well as the results. For more information, please contact Trinity at [info@trinitylifesciences.com](mailto:info@trinitylifesciences.com).

### About Trinity

Trinity is a trusted strategic partner, providing evidence-based solutions for the life sciences. With over 20 years of experience, Trinity is committed to solving clients' most challenging problems through exceptional levels of service, powerful tools, and data-driven insights. Trinity's range of products and solutions includes industry-leading benchmarking solutions, powered by TGaS® Advisors. Trinity, together with its subsidiary TGaS Advisors, has five offices throughout the US, including Boston, New York, Princeton, Philadelphia, and San Francisco, as well as Toronto, Canada, Gurgaon, India and Munich, Germany. To learn more about how Trinity is elevating life sciences and driving from evidence to action, visit [trinitylifesciences.com](http://trinitylifesciences.com).

### About Toluna

Toluna is a technology company connecting brands with consumers for digital qualitative and quantitative research. We deliver insights on demand through a full spectrum of end-to-end solutions that map customer journeys, develop new products and much more. Toluna is powered by an innovative platform, best-in-class methodologies and a community panel that is 30+ million members strong. An ITWP company, we employ 1,400 people in 24 offices across six continents. Please visit us at [tolunacorporate.com](http://tolunacorporate.com).