

# COVID-19 Briefing Series

## Impact of COVID-19 on Healthcare Market Research

*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>.*

*In this time of uncertainty, Trinity is assessing the impact on market research services including the ability of healthcare providers to participate in research.*



**Background:** Trinity along with Toluna, a leading provider of intelligence for healthcare, consumer and other industries, surveyed 561 healthcare providers in the US to understand how COVID-19 has impacted their engagement in market research activities. The research sample included 462 physicians across 35 specialties, 70 nurses and 29 physician assistants. The survey was fielded between March 26th and April 1st, 2020.

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

1. Stat News, Coronavirus will have a 'big impact' on one-third of U.S. clinical trial sites, survey finds; <https://www.statnews.com/pharmalot/2020/03/18/coronavirus-covid19-clinical-trials/>
2. U.S. FDA approves Bristol-Myers MS drug, launch delayed due to coronavirus - <https://www.reuters.com/article/us-bristol-myers-fda/u-s-fda-approves-bristol-myers-ms-drug-coronavirus-to-delay-launch-idUSKBN21D1GS?feedType=RSS&feedName=healthNews>

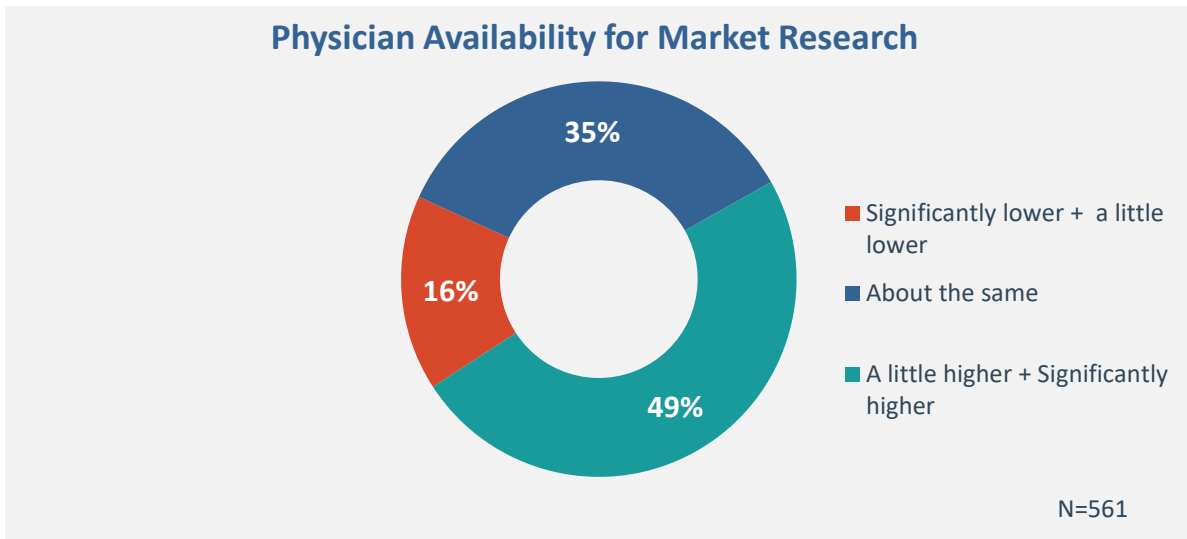
## HCPs continue to participate in Market Research

A majority of HCPs report similar or increased availability to participate in market research following the COVID-19 outbreak

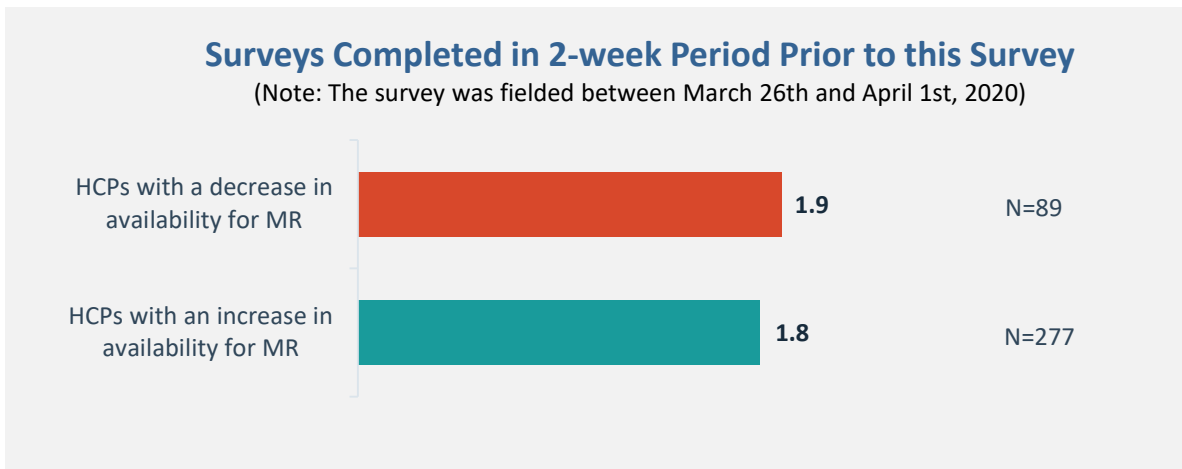
When asked about their level of engagement and availability to participate in MR, 49% of HCPs indicate an increase in availability, and another 35% indicate their availability was the same as before COVID-19. Interestingly, HCPs report having completed, on average, about two studies in the 2 weeks preceding the survey, which was fielded on March 26th.



**Figure 1**



**Figure 2**



## Ongoing and Anticipated Changes Impact Availability

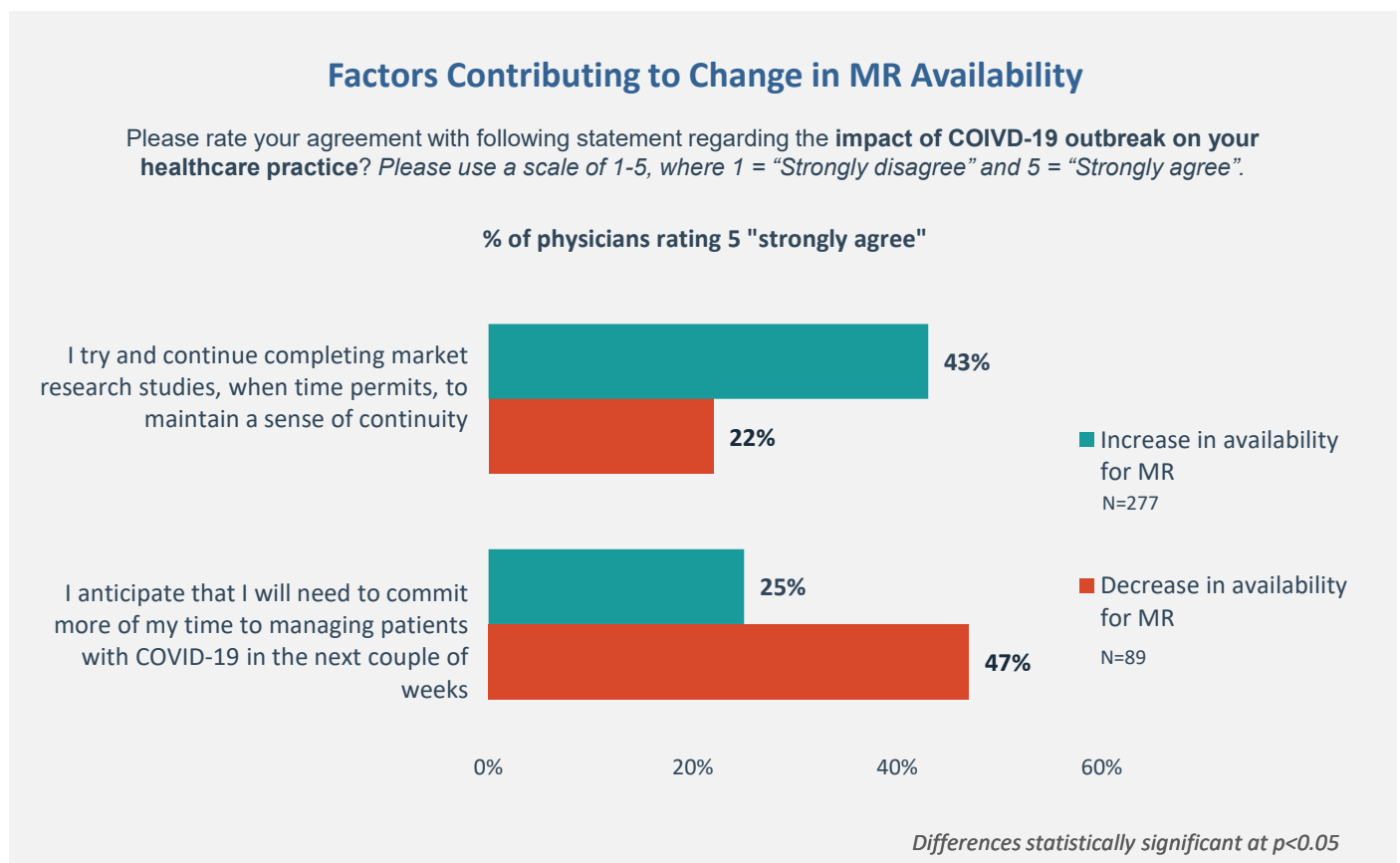
### HCPs want to participate in MR to maintain a sense of normalcy when time permits

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 (43% vs. 22% strongly agree, respectively).

In contrast, HCPs noting an increase in availability for MR are significantly less likely to anticipate needing to commit their time to managing patients with COVID-19 (25% vs. 47% strongly agree, respectively).



Figure 3



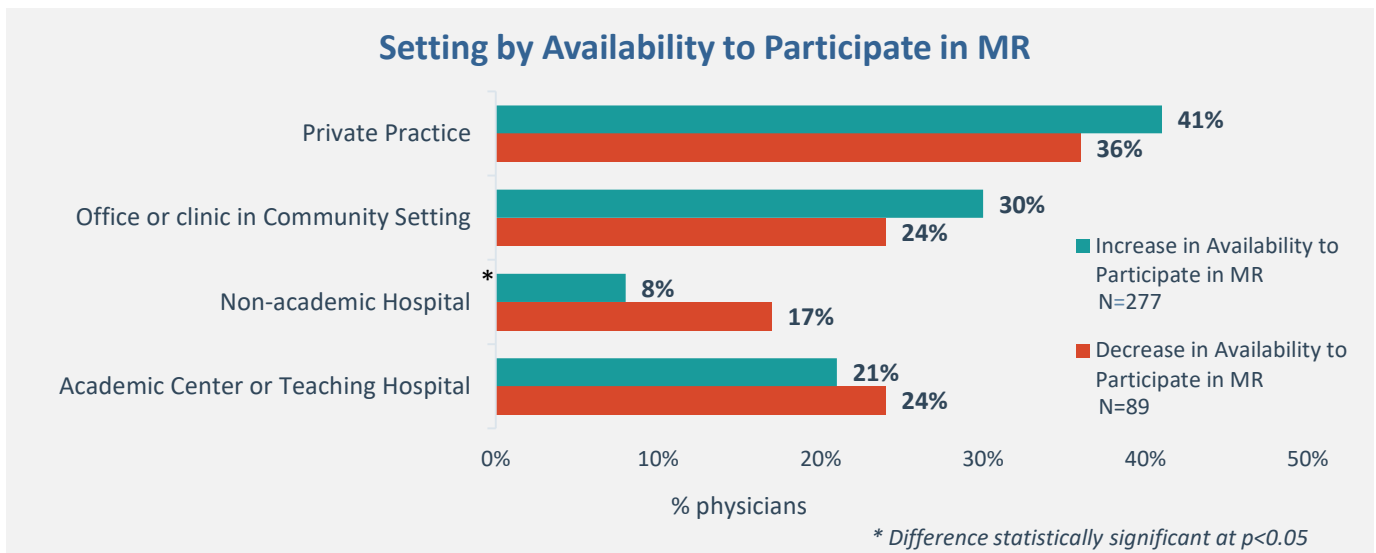
## Demographic Difference Impact Availability

HCPs in private practice/community clinics have greater availability for MR as they see fewer COVID-19 patients

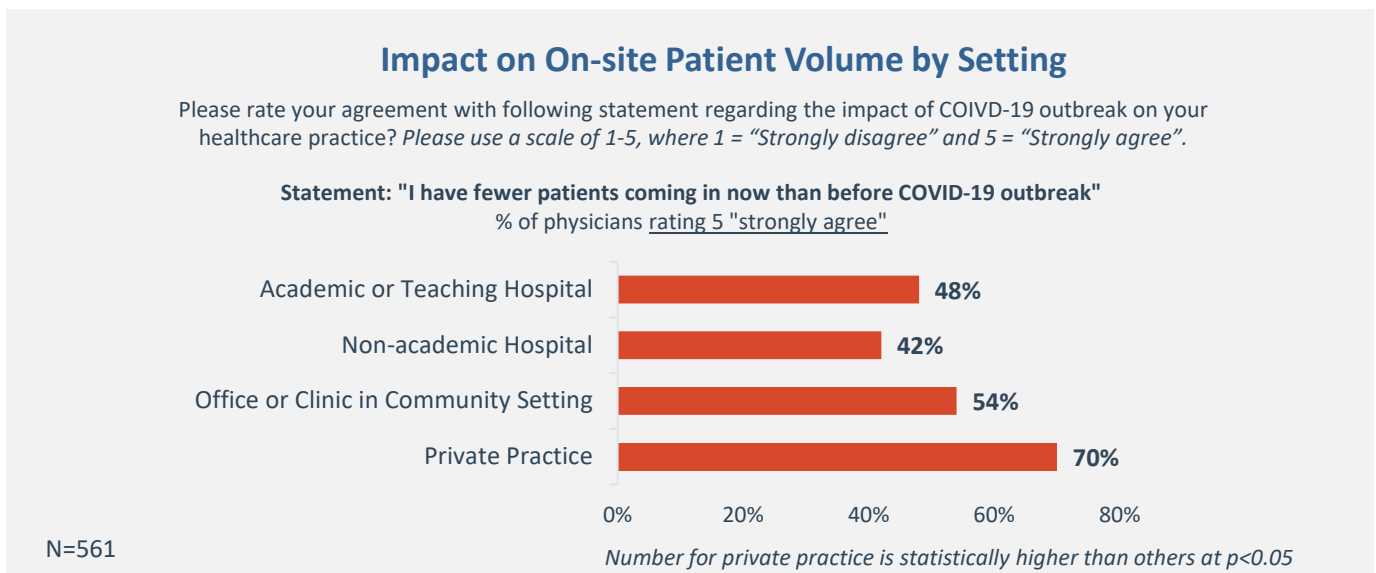
Among HCPs indicating they have an increase in availability to participate in MR, 71% practice in the private setting or community clinics vs. 60% of HCPs who report decreased availability. This increase in availability appears to be driven partially by a decrease in on-site patient volume.



**Figure 4**



**Figure 5**



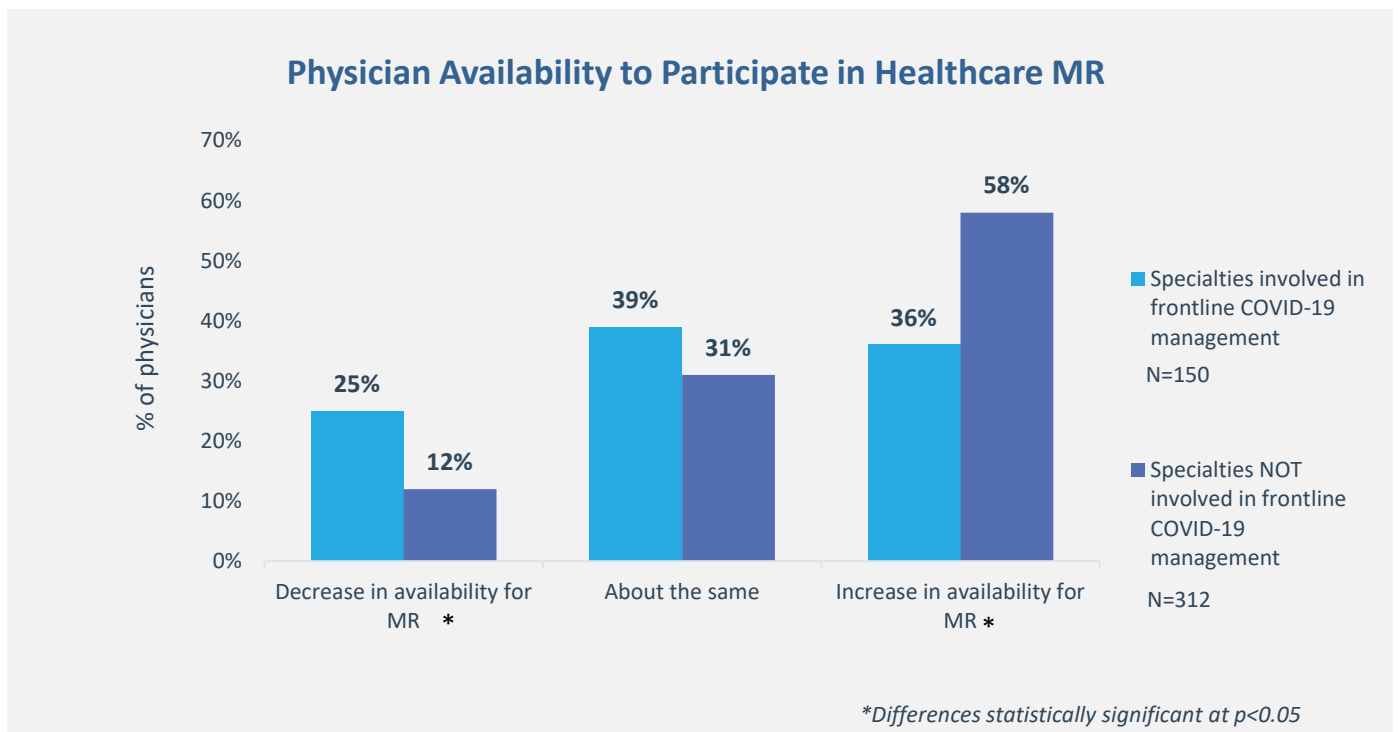
## Demographic Difference Impact Availability

Physicians on the frontline of treatment indicate a relatively lower availability to participate in MR as they need to commit more time to COVID-19

Physicians (MD/DO) were categorized 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. A statistically larger proportion of physicians that are NOT involved in the frontline management of COVID-19 report higher availability to participate in MR (58% vs. 36%).



Figure 6



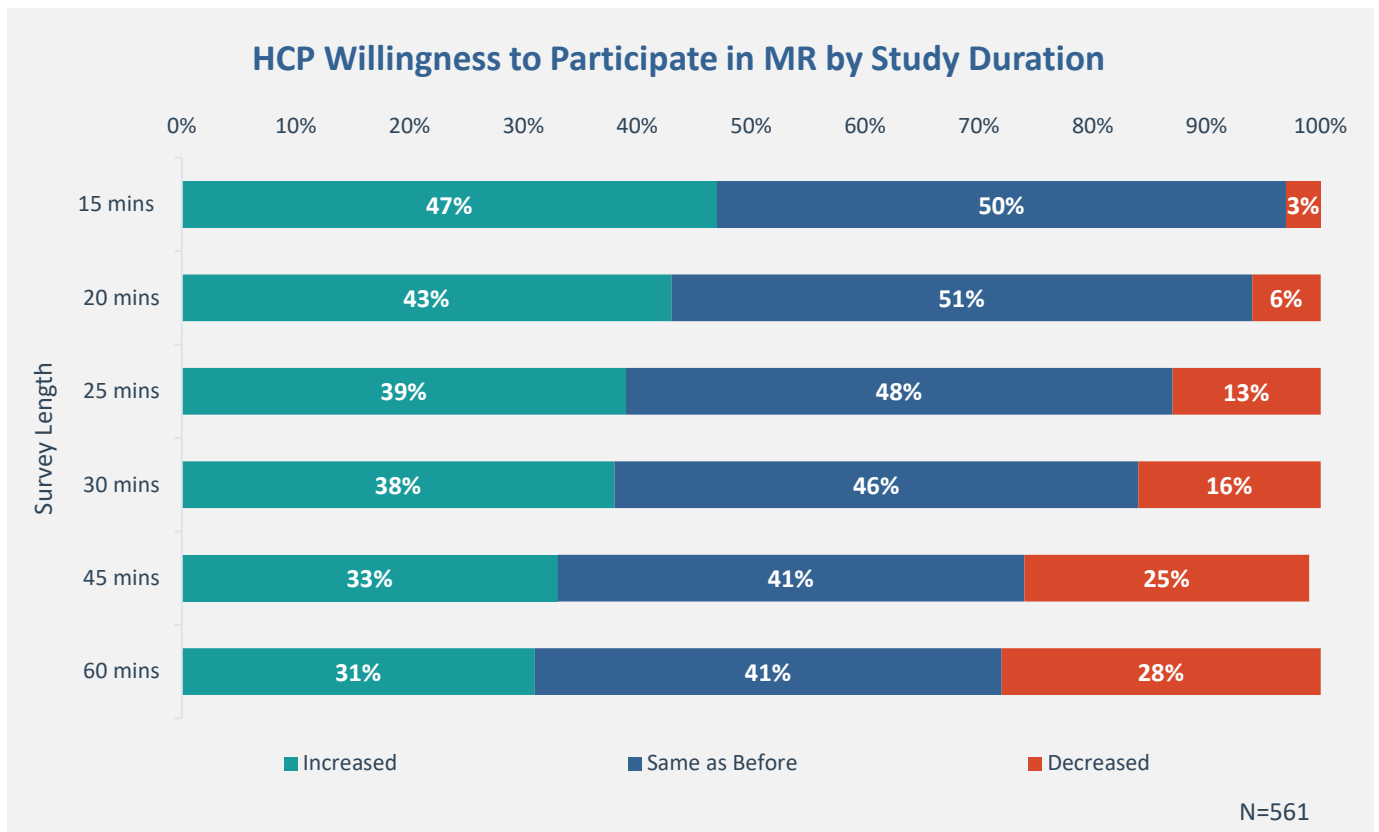
## Willingness to Participate in Shorter Surveys is Strong

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

At least 30% of HCPs indicate a willingness to participate in MR studies for up to 60 minutes. However, the proportion of HCPs who report an increase in willingness to participate grows notably for shorter surveys (47% 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, a more substantial proportion of HCPs do not anticipate having the time to commit to longer surveys during the outbreak.



Figure 7



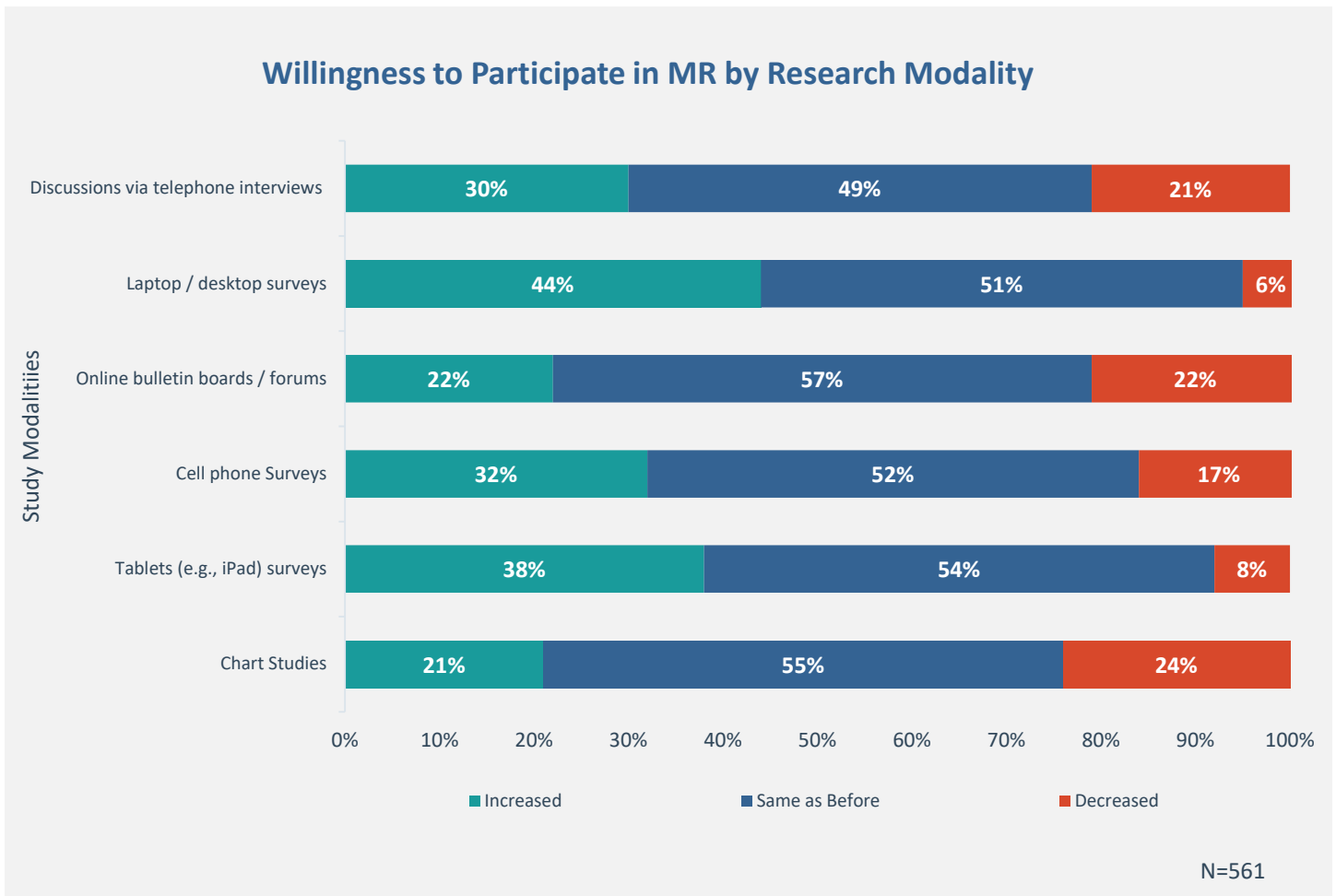
## Willingness to Participate Across Modalities is High

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

Over 90% of HCPs report that their willingness to participate in online surveys has not been negatively impacted.



Figure 8





## 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, specifically among HCPs at the frontline of COVID-19 management. 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 and as HCPs try to participate in MR, if time permits, to maintain a sense of normalcy
- Physicians who do not practice in the hospital settings tend to have more availability, as do physician specialties that are not on the frontline of COVID-19 management
- Willingness to participate remains robust regardless of study type and duration. However, longer studies may see slightly lower interest as HCPs get busier with management

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).