

Impact of COVID-19 on Population Health

June 2020

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Objectives

Shifting Priorities: Understand the current and expected future impact of the COVID-19 pandemic on payers' and health systems' therapeutic area and population health priorities

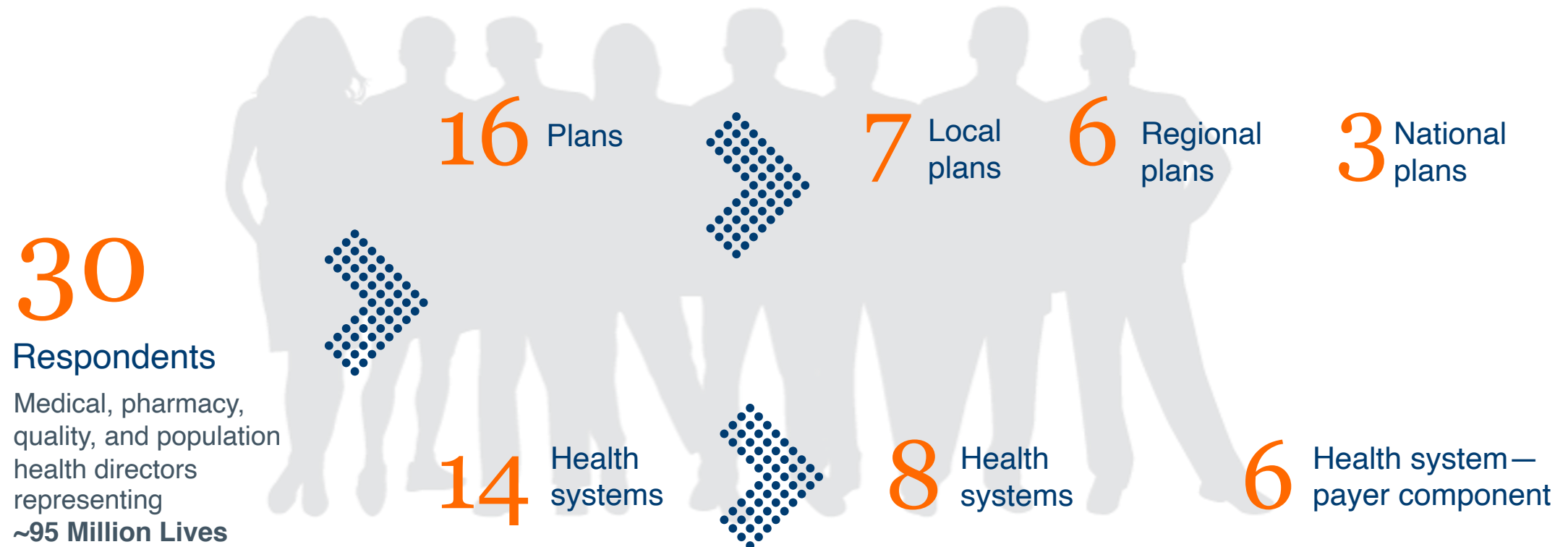
Evolving Practices: Learn how payers and health systems are changing their administrative, care management, and population health practices during the COVID-19 pandemic

Emerging Opportunities: Identify opportunities for pharmaceutical manufacturers to support payers and IDNs during and after the COVID-19 pandemic

Respondent Demographics

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Rapid Pulse from PRECISIONvalue is a high-speed survey and analysis service that provides pharmaceutical marketers with rapid insights from market access decision makers



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Topline Findings

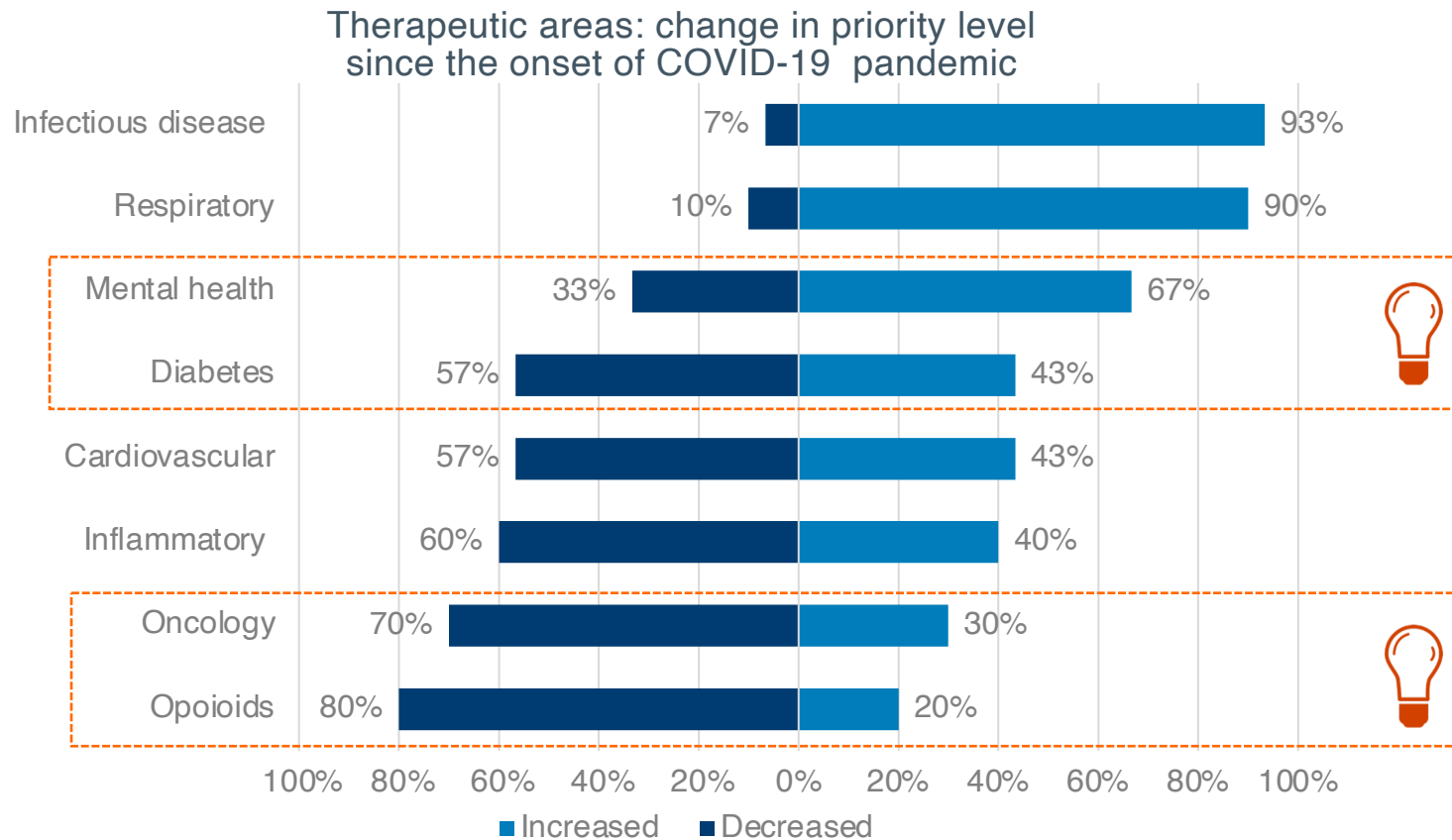
Topline Findings

Shifting Priorities: Therapeutic Areas and Population Health Approaches Have Adjusted to Address COVID-19

Therapeutic Areas <i>% of respondents citing an increase in priority due to COVID-19</i>		Population Health Programs <i>% of respondents citing an increase in priority due to COVID-19</i>		Social Determinants of Health <i>% of respondents citing an increase in priority due to COVID-19</i>		Population Health Infrastructure <i>% of respondents who expect each item to “remain important” or “become more important”</i>	
Infectious disease	93%	Remote care delivery	97%	Access to care	93%	System for population identification and segmentation	93%
Respiratory conditions	90%	Discharge planning	90%	Access to medications	90%	Complex care management	83%
Mental health	67%	Patient engagement	90%	Social isolation	83%		
				Financial distress	80%		

Topline Findings

Shifting Priorities: De-prioritization of opioids and oncology conditions may lead to future exacerbations












Payer respondents were more likely than health system respondents to say that diabetes (63% vs 21%) and mental health (75% vs 57%) have increased in priority

A de-prioritization of the opioids and oncology conditions potentially lead to problems over the coming months and years

Topline Findings

Evolving Practices: Plans and Health Systems Are Emphasizing Care and Crisis Management

Care Management	Administrative Procedures	Crisis Management
Most respondents (90%) have changed their care management tactics in response to COVID-19	Administrative changes affecting the care of chronic patients have been implemented in response to COVID-19	Most respondents (77%) have implemented crisis management tactics as a result of COVID-19
<p>Commonly cited changes to care management tactics include:</p> <ul style="list-style-type: none"> • More proactive outreach  • Increased focus on telehealth  • Added staff  	<p>Commonly cited administrative changes to care management tactics include:</p> <ul style="list-style-type: none"> • Additional activities to support safety of staff (77%)  • Additional activities to support emotional well-being of staff (67%)  • Increased delivery or reimbursement of telehealth visits (73%)  	<p>Commonly cited crisis management activities include:</p> <ul style="list-style-type: none"> • Incident command centers  • Focus on staff well-being  • Dedicated resources and staff for COVID-19 patients 




Topline Findings

Emerging Opportunities: Plans and Health Systems Expressed Willingness to Collaborate on Population Health, Quality, and Value-Based Initiatives

Therapeutic Areas for Value-Based Collaborations in Next 12 Months <i>% of respondents indicating either No. 1 or No. 2 most important therapeutic area for collaboration.</i>	Population Health Infrastructure <i>% of respondents indicating a current or planned collaboration or willingness to collaborate with a pharmaceutical manufacturer in this area.</i>	Population Health Programs <i>% of respondents indicating a current or planned collaboration or willingness to collaborate with a pharmaceutical manufacturer in this area.</i>	Quadruple Aim <i>% of respondents indicating a current or planned collaboration or willingness to collaborate with a pharmaceutical manufacturer in this area.</i>	Social Determinants of Health <i>% of respondents indicating “willing to partner” or “extremely willing to partner” with a pharmaceutical manufacturer in this area.</i>
Diabetes 64%	Wellness and prevention programs 90%	Medication and adherence management 87%	Supporting quality performance 83%	Access to medications 54%
Cardiovascular 53%	Delivery system supports 87%	Patient outreach / engagement 83%	Real-world Evidence 83%	Health literacy 47%
Infectious disease 26%	Complex care management 80%	Adverse event management 83%		Food insufficiency 46%

Topline Findings

Emerging Opportunities: Plans and Health Systems Expressed Willingness to Collaborate on COVID-19, Crisis Management, and Vaccination Efforts

Eventual COVID-19 Vaccine Support	Existing Vaccine Support	Crisis Management Support
 <p>Most payers and health systems will need at least some support from manufacturers:</p> <ul style="list-style-type: none"> • Health systems 100% will need at least “some support” • Payers 75% will need at least “some support” 	 <p>Approximately half of respondents are collaborating or planning to collaborate with pharmaceutical manufacturers on influenza, herpes zoster, or pneumococcal pneumonia vaccines</p>	 <p>80% of respondents are willing to collaborate with manufacturers on crisis management for COVID-19 or future crises</p>

THANK YOU!

we look forward to staying in touch

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