

CARENITY WEBINAR:

WHAT IS THE IMPACT OF COVID-19 ON CHRONIC PATIENTS? RESULTS OF WAVE 2

Carenity Survey

June 3 to September 21, 2020

06 OCTOBER 2020

Agenda

Webinar Agenda

Timing

- | | |
|--|-----|
| • About Carenity – Michael Chekroun | 5' |
| • Study Context and Objectives – Christie Rocha | 5' |
| • Methodology – Christie Rocha | 5' |
| • Respondent Profiles – Christie Rocha | 5' |
| • Analysis of Results – Christie Rocha | 20' |
| • Summary of Key Findings – Christie Rocha | 5' |
| • Q & A – Michael Chekroun, Tiphaine Levy-Heidmann, Christie Rocha | 15' |





About
Carenity



Study Context
&
Objectives



Methodology



Respondent
Profiles



Analysis of
Results



Summary of
Key Findings



Q&A

Speaker Bios



Michael CHEKROUN | CEO & Founder

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- *Edhec & London School of Economics*
- **2000-2002: Strategy consultant – Gemini Consulting**
- **2013-2014: Strategy consultant – Kea & Partners**
- **2010-2015: Manager, Corporate Finance, Life Sciences – Ernst & Young**
- **2011: Founded Carenity**



Tiphaine LEVY-HEIDMANN | Data Scientist

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- *ENSAE ParisTech & HEC Paris*
- **2017: Strategy Consultant – PMP Conseil**
- **2018: Data Scientist – Altice USA**
- **2019: Data Scientist – Carenity**




Christie ROCHA | Senior Director, Business Development

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- *University of California, San Diego & University of San Francisco, Psychology*
- **2007-2009: Solutions Architect – Patni Life Sciences**
- **2010-2017: Portfolio Director – PAREXEL**
- **2018-2019: Business development – IQVIA**
- **2020: Business Development – Carenity**

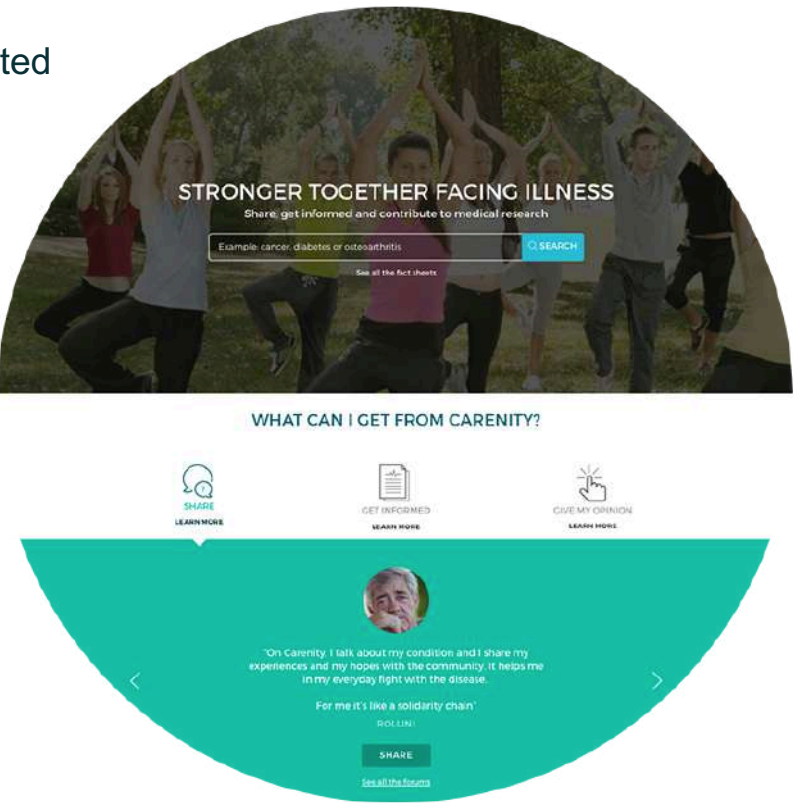
Carenity is a leading digital social platform supporting 400k patients and caregivers in Europe & North America


 Company incorporated in **2011**

 **2** offices worldwide (Paris and Boston)


 **35** passionate full-time employees

 **100+** paying life science customers



 **5** languages supported for Europe and North America

 **400,000+** members (patients and caregivers)

 **1,200+** chronic diseases and other health ailments

 **500+** patient insights projects and publications

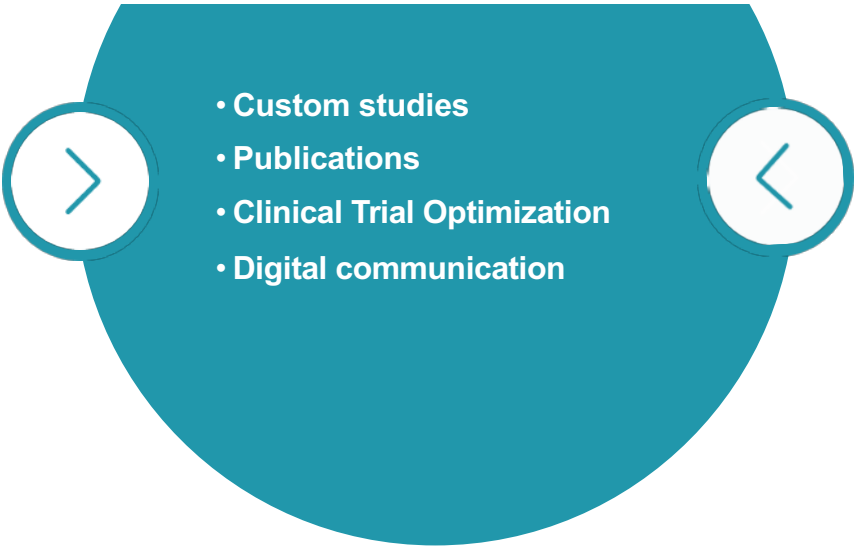
Our Mission: Engage online patient communities to uncover real-world insights and advance medical research

A social & information platform for patients



Empower Patients

carenity Solutions
The Patient's view



A real-world data platform For the Life Science industry



Guide Healthcare Industry

Carenity brings value at every stage of a drug’s life cycle

	CLINICAL	ACCESS	COMMERCIAL
Scope	<ul style="list-style-type: none">• New product development• Clinical Trial Strategy	<ul style="list-style-type: none">• New product launch• Market Access strategy	<ul style="list-style-type: none">• Drug monitoring in real-life• Customer strategy
Customer Benefits	<ul style="list-style-type: none">• R&D savings with faster patient enrolment & higher retention• Improved target product profiling• End users involved in the design of future drugs	<ul style="list-style-type: none">• Faster time to market (marketing authorizations)• Stronger Pricing & Reimbursement dossiers• Publications with increased visibility in medical congresses and journals	<ul style="list-style-type: none">• Market differentiation• Safety and compliance data• Better interaction with medical community and patient associations• Identify and develop patient-centric solutions

Our industry and institutional partners



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Q&A

Covid-19 Wave 2 Study Context and Objectives

Context

Question: Will chronic patients be the collateral victims of the COVID-19 pandemic?

Impact on treatment adherence and social and psychological impact of the pandemic

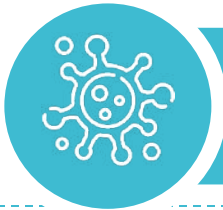
Real-time measure of COVID-19 impact on access to care and use of telehealth

Results are from across Europe and the United States

Objectives



Track the impact of COVID-19 on chronic patients regarding their access to physicians, treatment and use of telehealth.



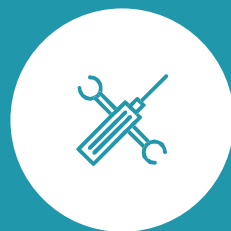
Understand the psychological and social impact of the pandemic on patients with chronic illness during lockdown and post lockdown.



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Methodology – Wave 2

Survey:







- Online survey on the Carenity platform
- Invitations and reminders sent via email
- Questionnaire designed by Carenity with the support of medical experts

Duration of fieldwork:

- June 3rd, 2020 to September 21st, 2020 (3.5 months)

Target and inclusion criteria:

- Adults living in France, the UK, Germany, Italy, Spain or the US
- Members of the Carenity platforms

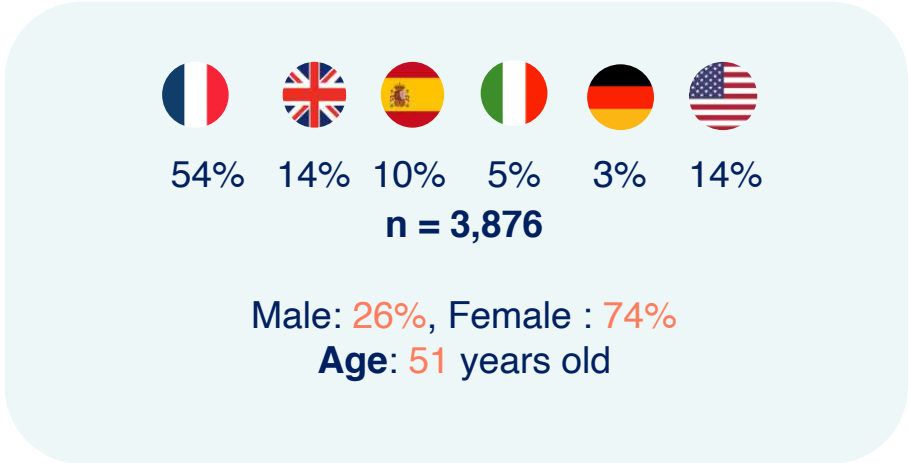
	Global						
All respondents	n = 3,876	n = 2,097	n = 552	n = 385	n = 185	n = 104	n = 553
Patients	n = 3,495	n = 1,960	n = 499	n = 354	n = 147	n = 92	n = 443
Other respondents	n = 381	n = 137	n = 53	n = 31	n = 38	n = 12	n = 110

Methodology

Key Topics of the questionnaire

- Respondent’s profile
- Impact on treatment adherence and medical consultation
- Use of telehealth consultation
- Social and psychological impact and well-being
- Main concerns about the outbreak
- Resuming activities after lockdown
- Satisfaction with information

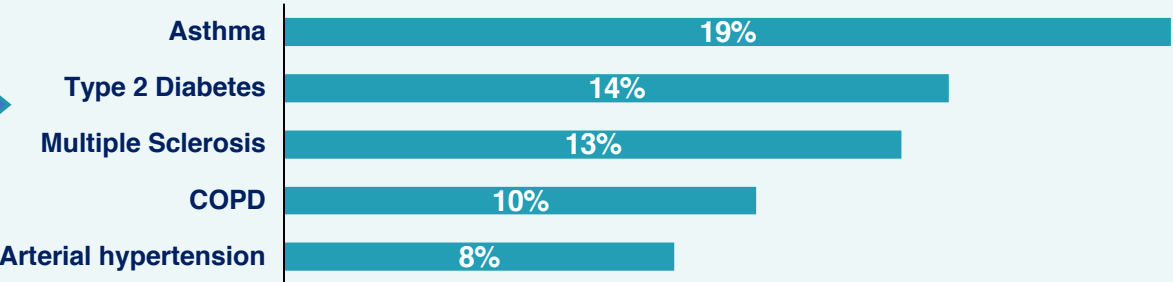
Summary of Patient Population



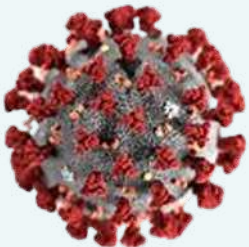
Timeline



Chronic Illness



Pandemic Coronavirus (COVID-19)





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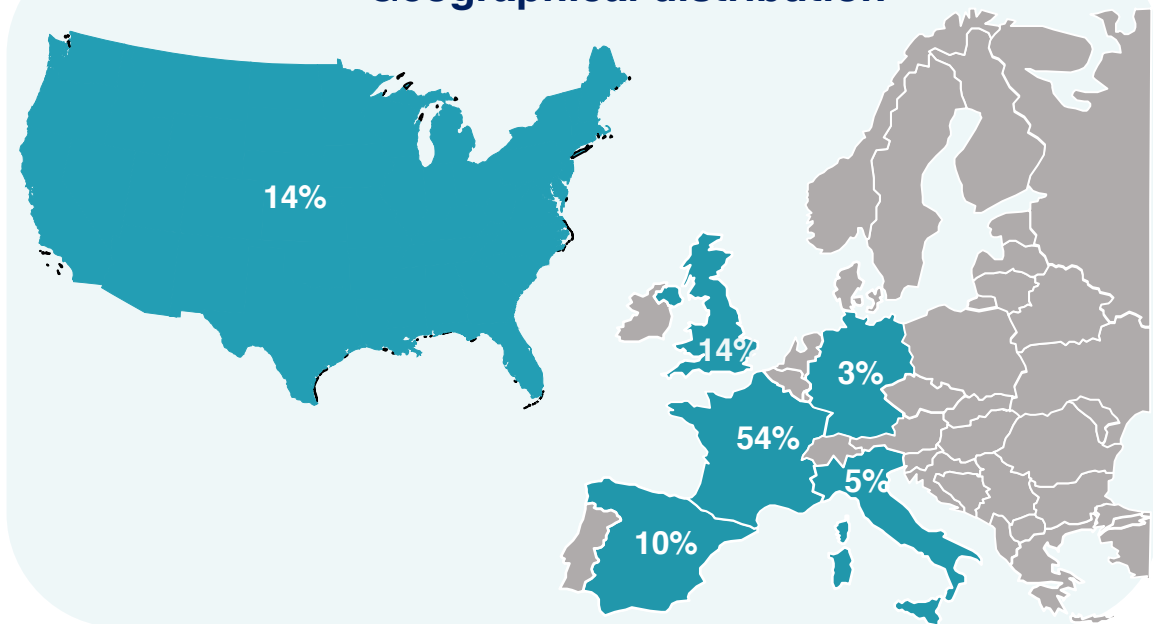
Q&A

Sociodemographic Profile

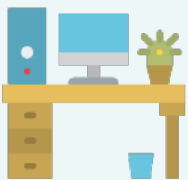
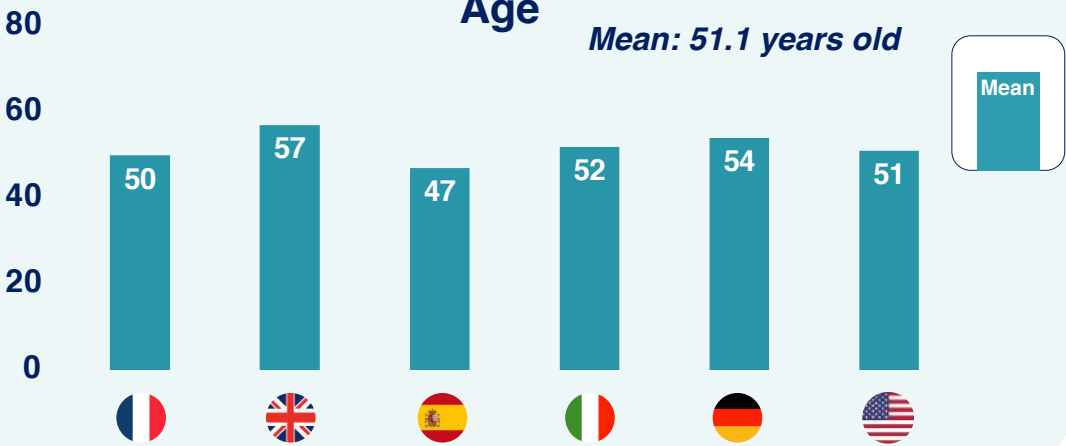
Gender



Geographical distribution



Age

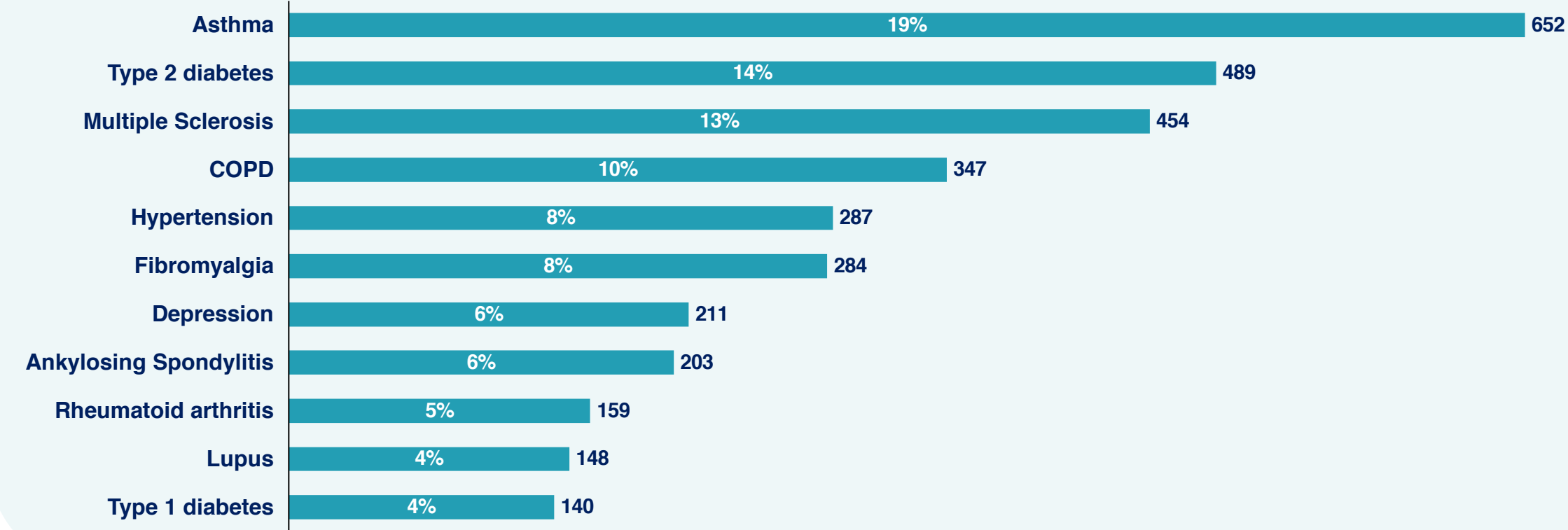


43% were professionally impacted
(short-time working, homeworking, sick leave, paid or unpaid leave...)

Base: 3,876 respondents

Respondents' Chronic Illnesses

Most frequent chronic conditions



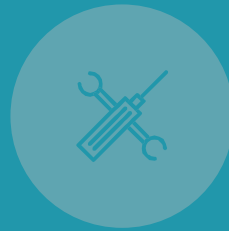
Base: 3,495 respondents with a chronic condition



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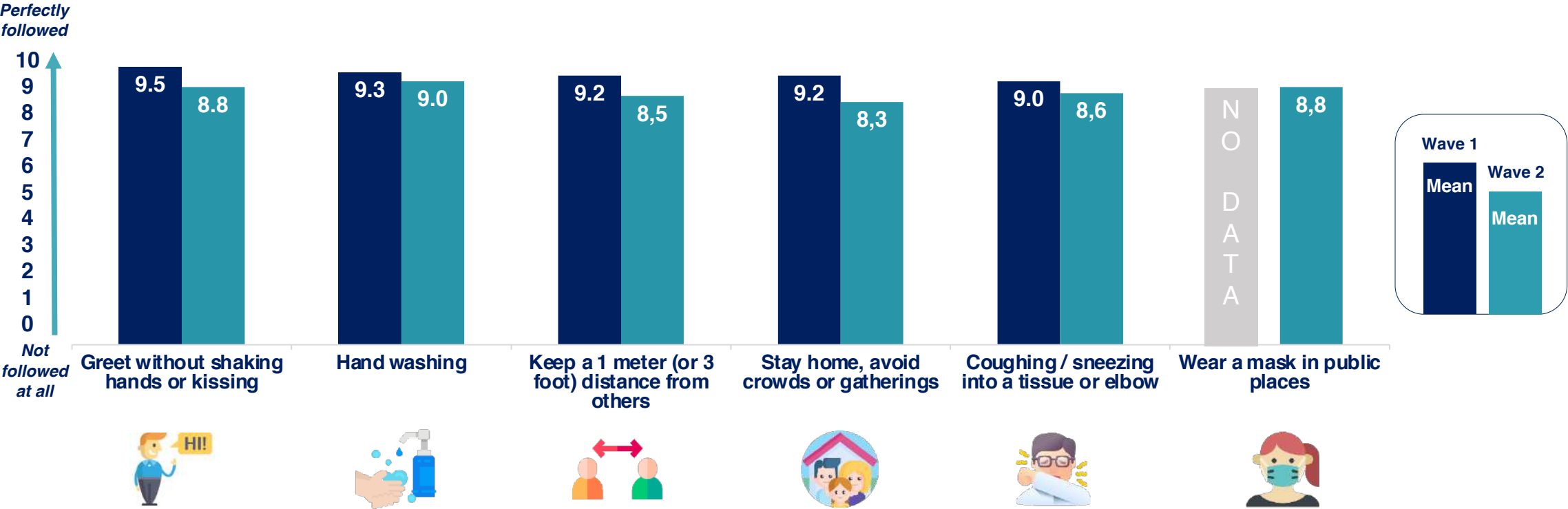


Summary of
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Q&A

Following of Health Authority Recommendations



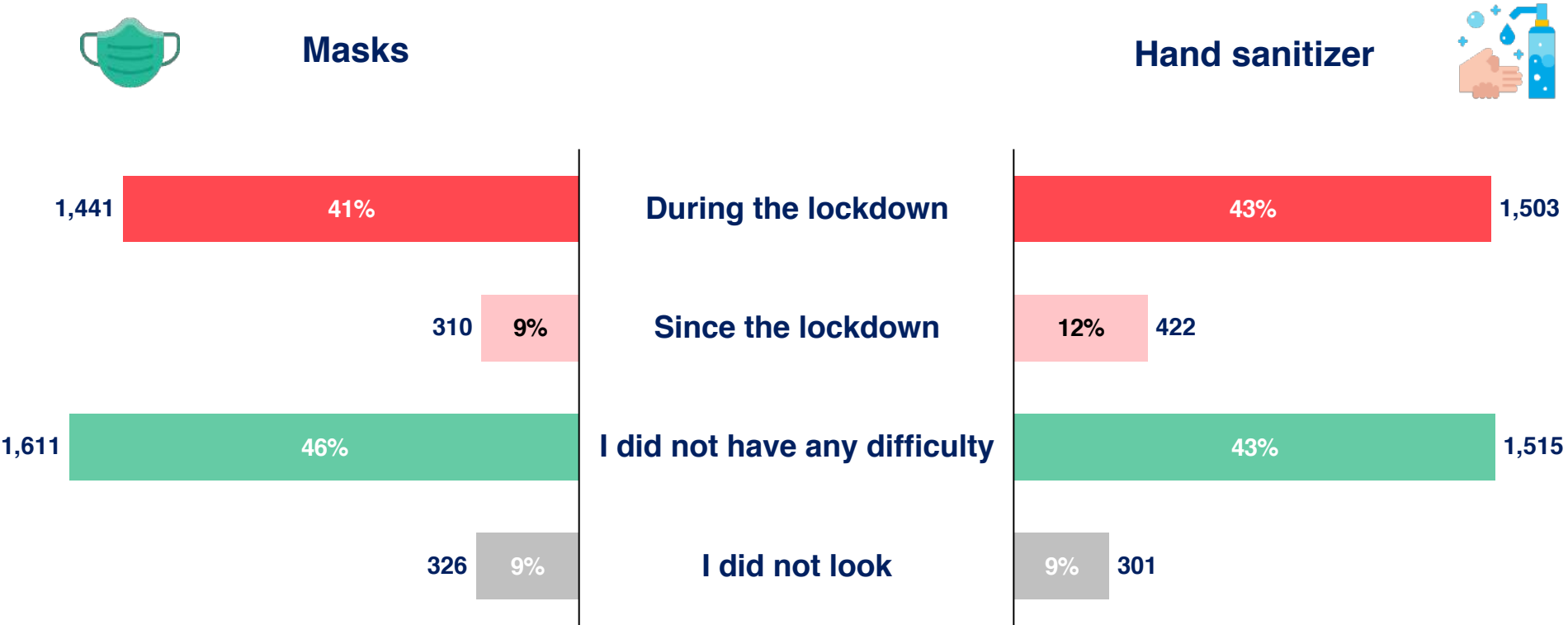
Base: 7,458 respondents (Wave 1) / 3,876 respondents (Wave 2)

Following of Health Authority Recommendations – focus on countries



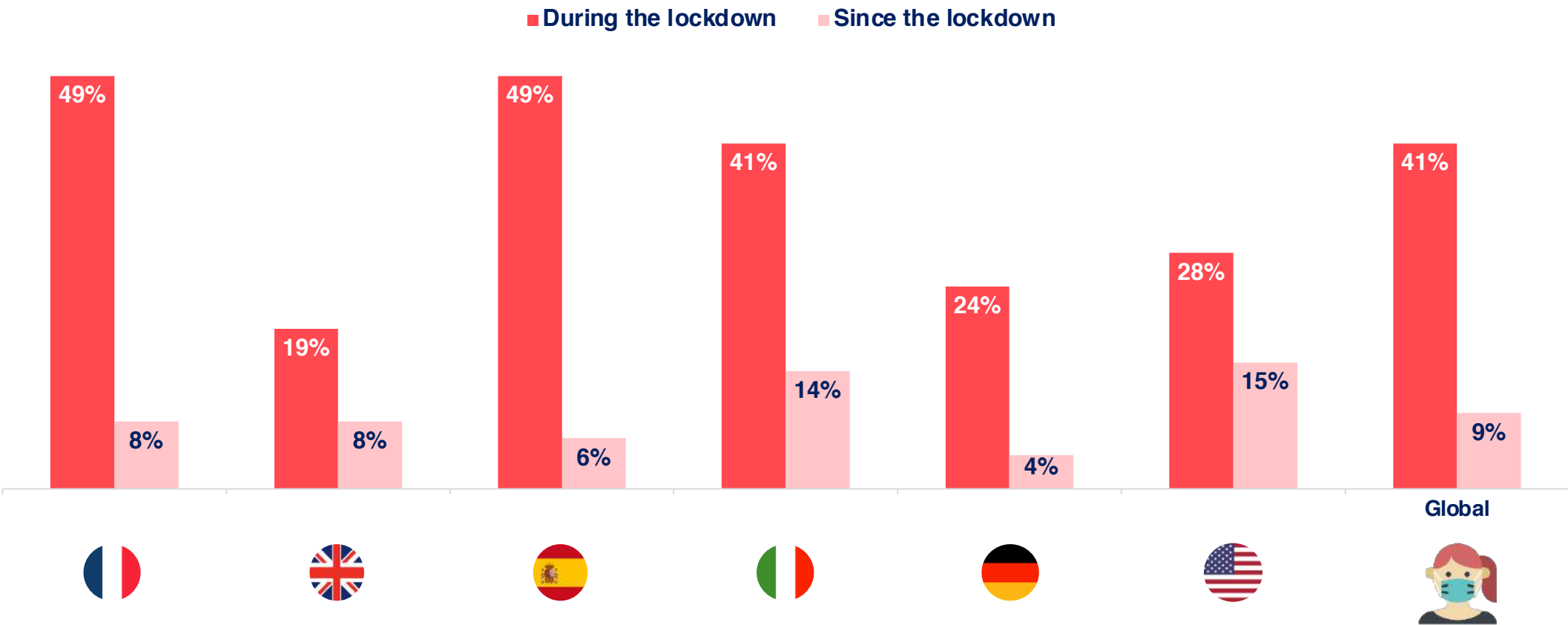
Base: 3,876 respondents (Wave 2)

Difficulties Obtaining Masks and Hand Sanitizer



▪ Base: 3,495 respondents with a chronic condition

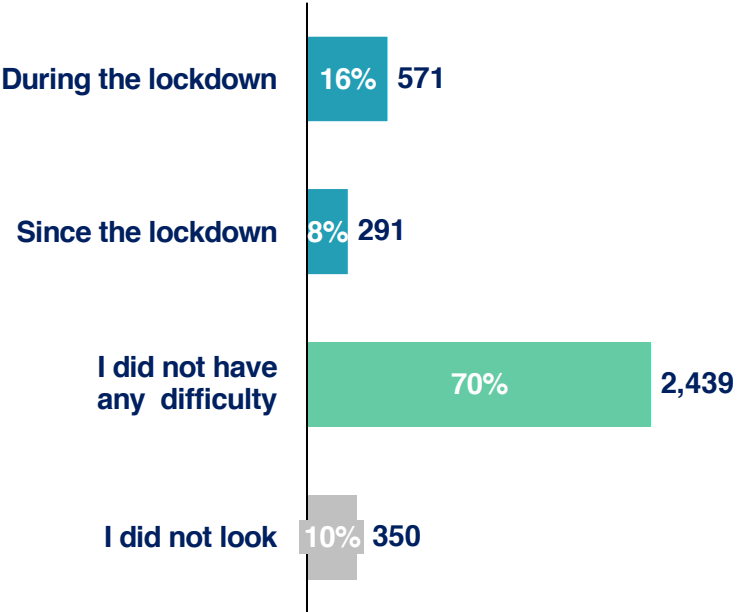
Difficulties obtaining masks – focus on countries



■ Base: 3,495 respondents with a chronic condition

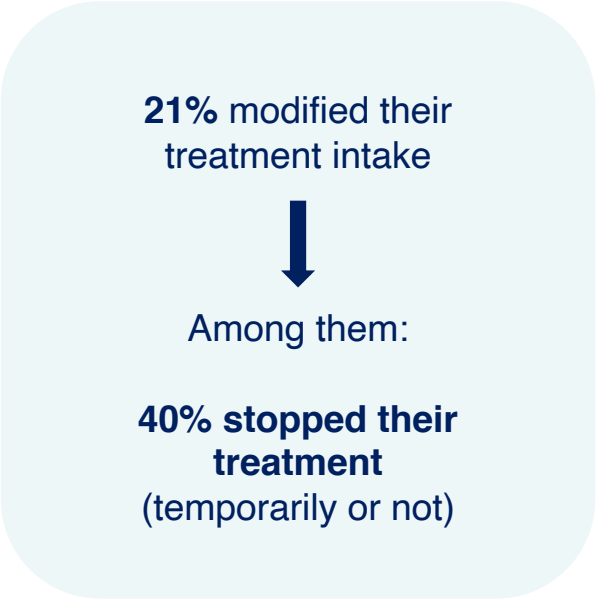
Impact on Treatment Adherence

Difficulty in Finding Treatments

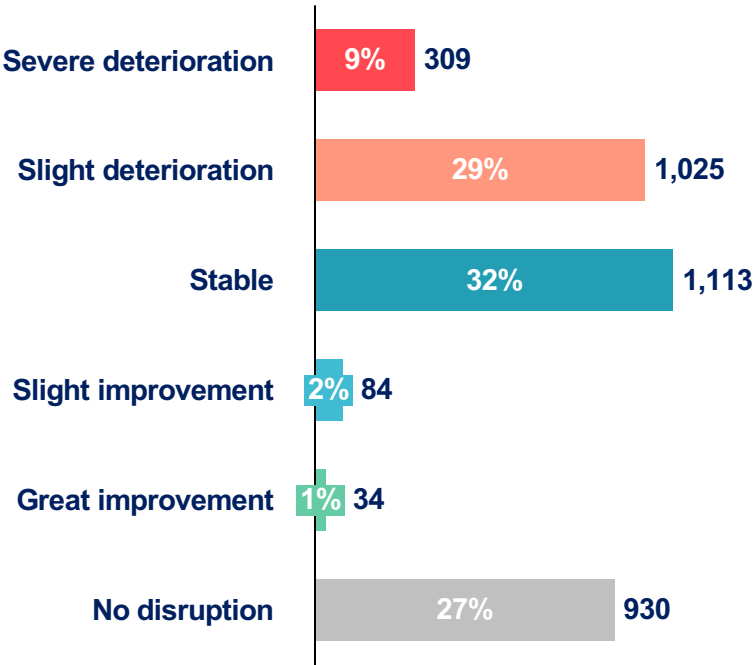


Modification of Treatment Adherence

(3,033 patients taking a long-term treatment)



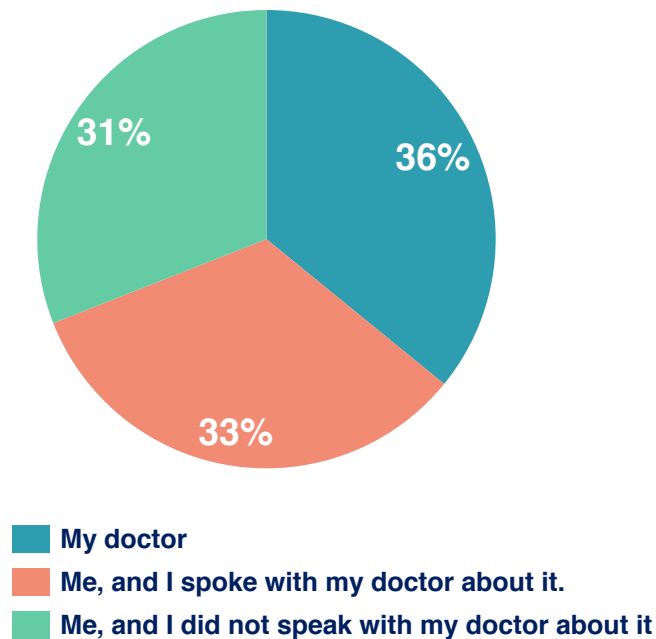
Impact of care disruption during lockdown on patients' self-reported health



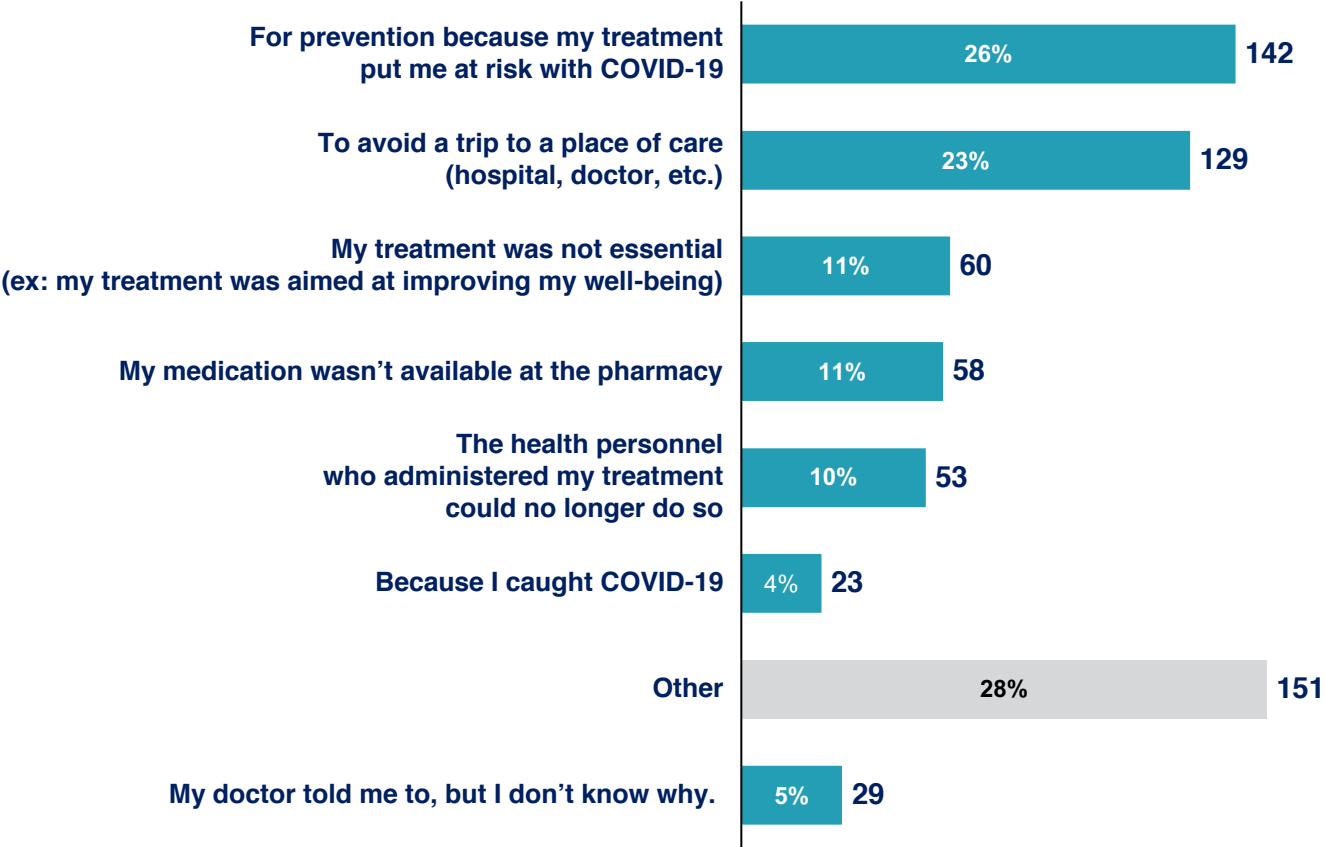
Base: 3,495 respondents with a chronic condition

Impact on Treatment Adherence

Person who initiated treatment disruption or modification



Reasons for treatment modification

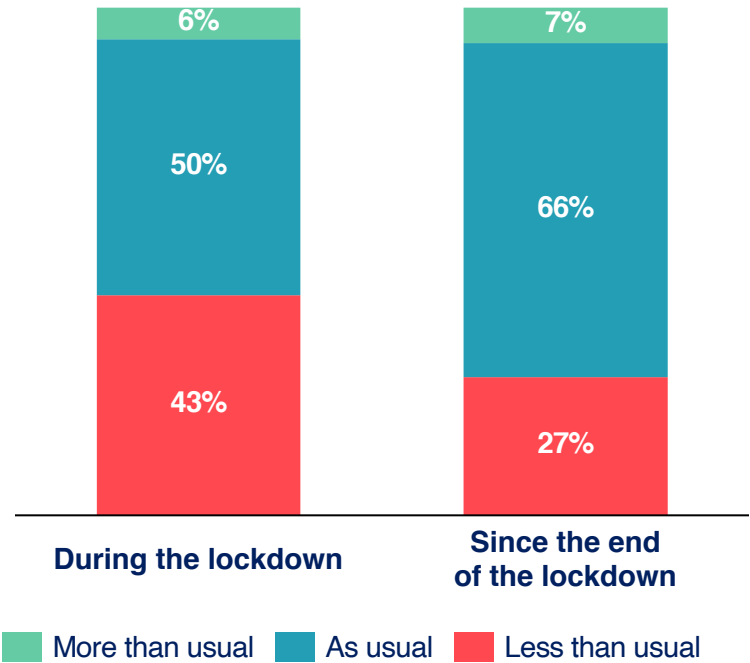


Base: 549 respondents who modified the frequency of their treatment intake

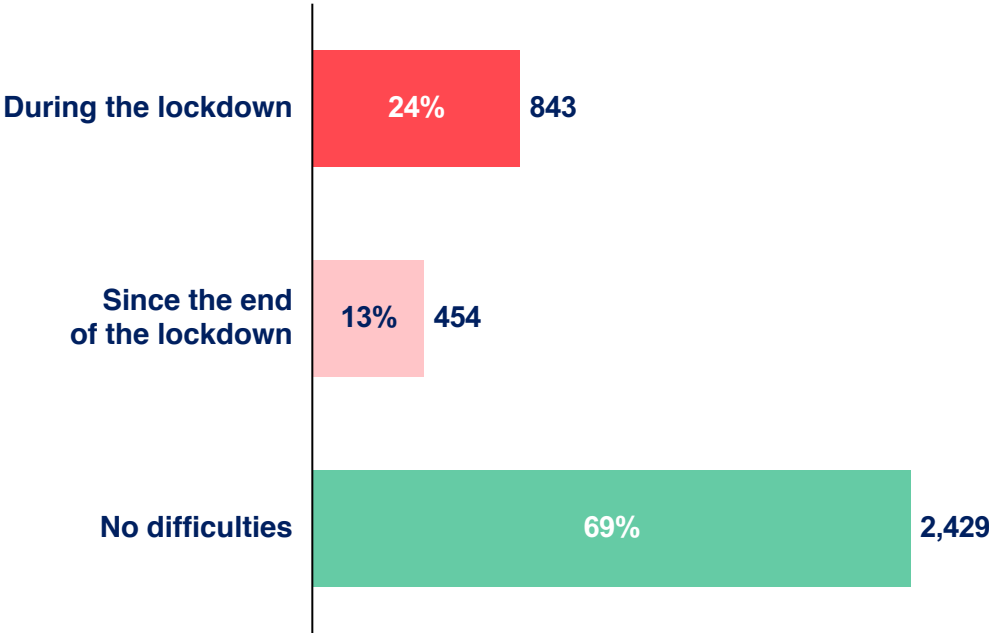
Impact on Medical Consultations



Consultation frequency



Difficulties in finding an available doctor

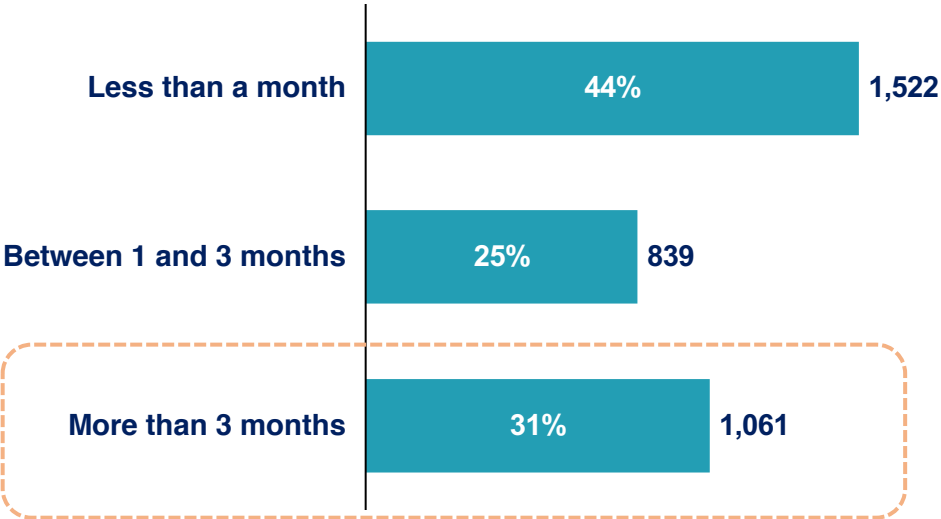


Base: 3,495 respondents with a chronic condition

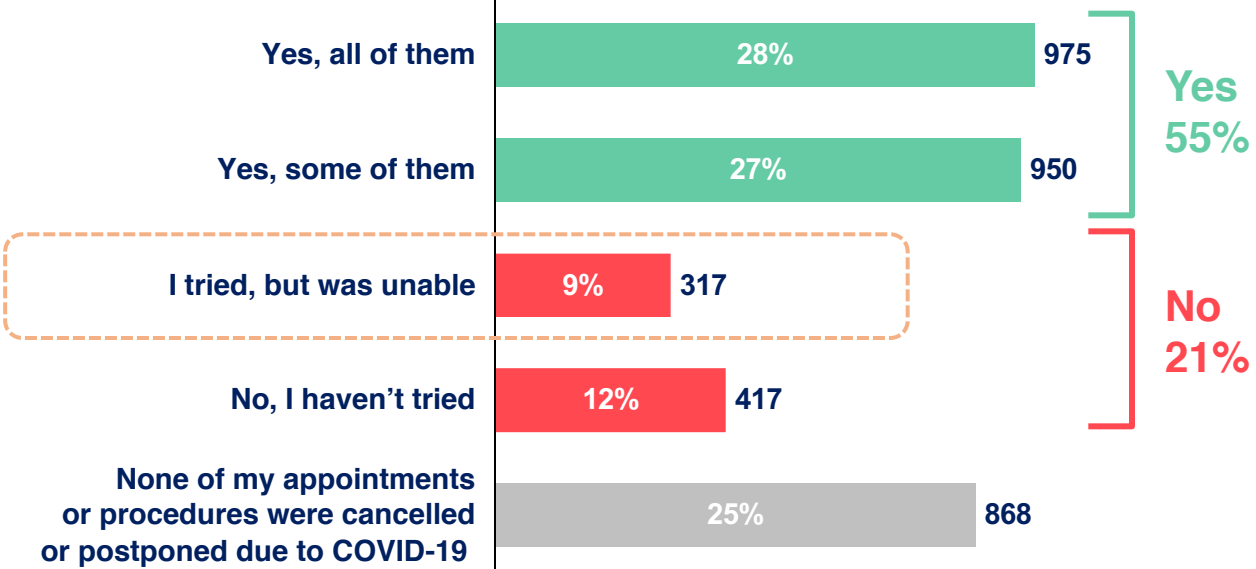
Impact on Medical Consultations



Time since last contact with specialist handling follow up of the patient's condition

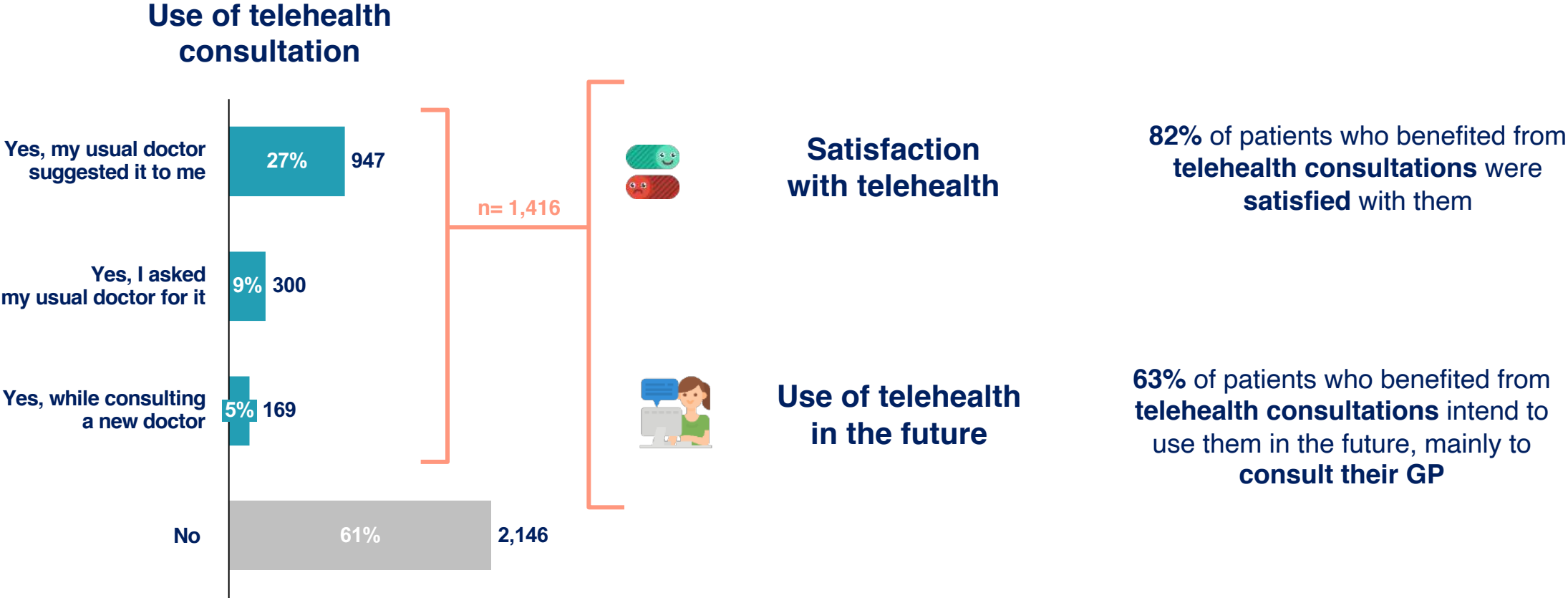


Rescheduling of cancelled interventions or consultations



Base: 3,422 respondents that indicated last contact with specialist // 3,495 respondents with a chronic condition

Use of telehealth consultation for patients' chronic disease follow-up

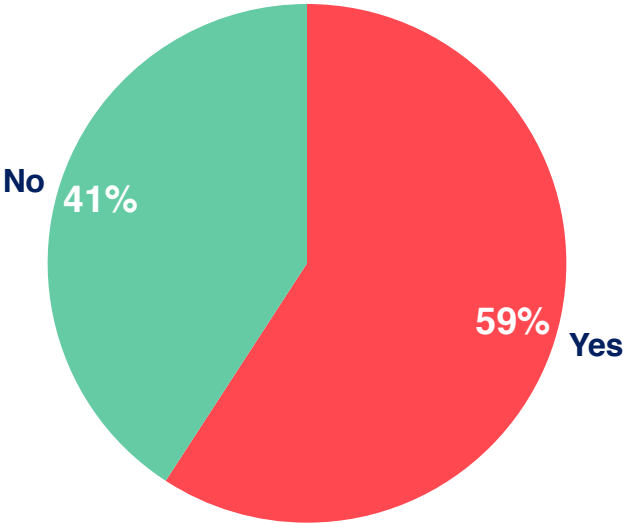


Base: 3,495 respondents with a chronic condition

Social and Psychological Impact of the Pandemic



Feeling of endangerment
because of chronic disease
during the pandemic



Greatest impact

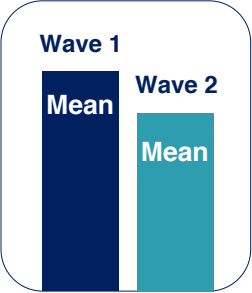


Lowest impact

Impact on stress and state of mind

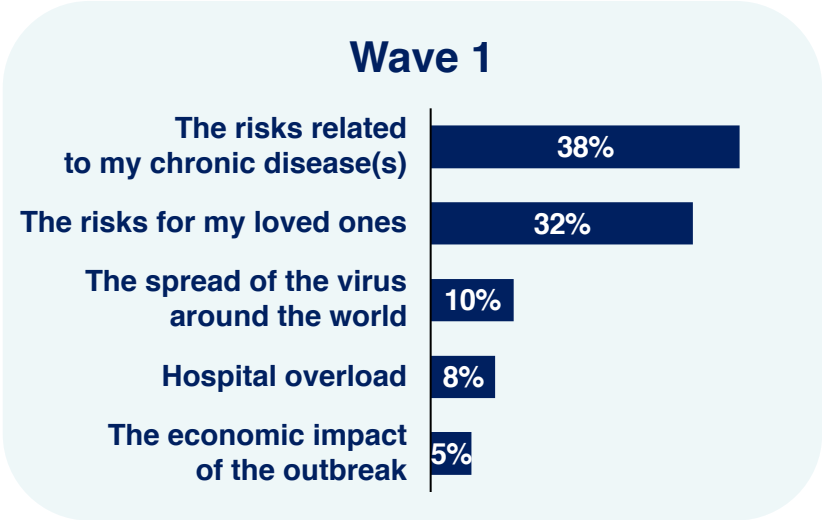
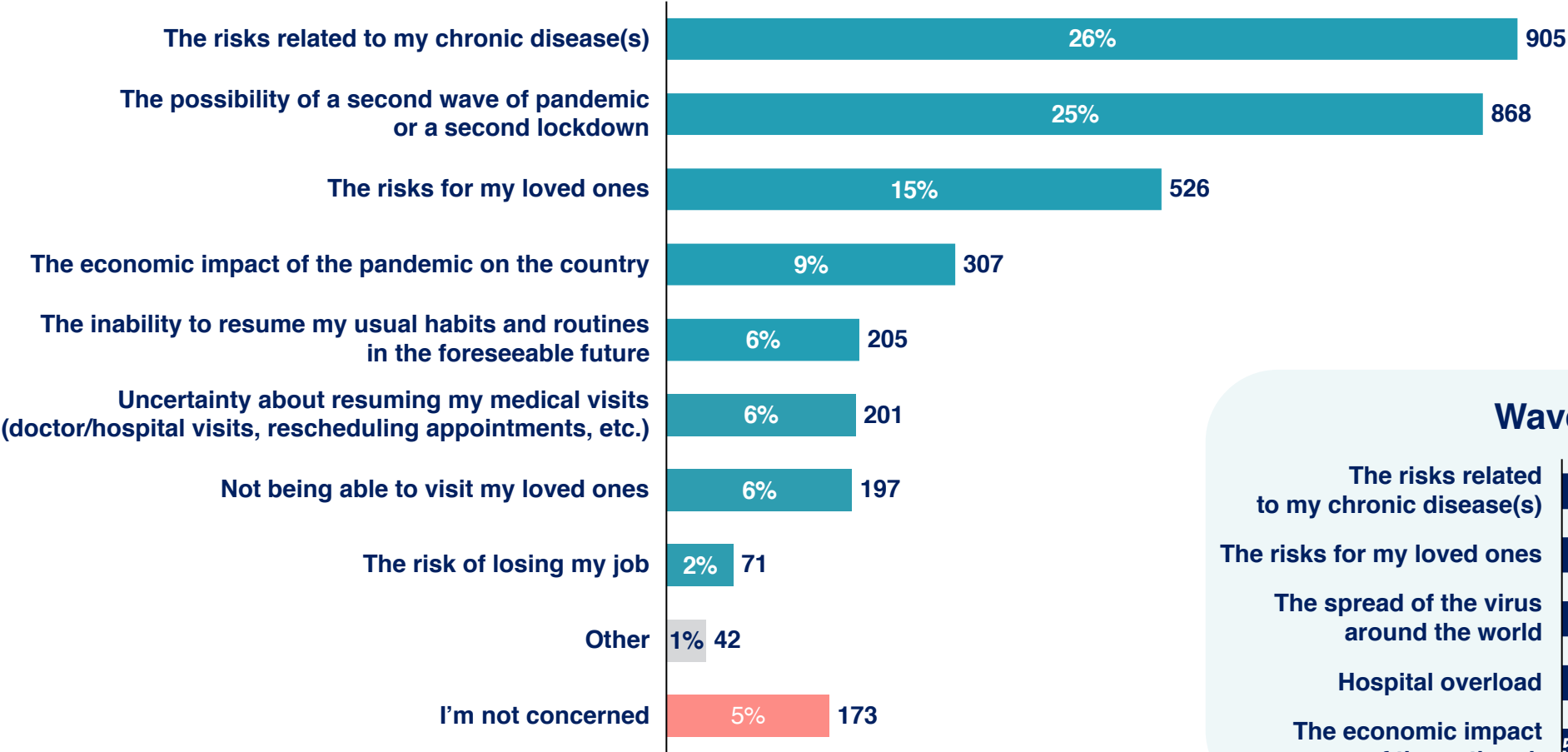


Social isolation



Base: 6,780 (Wave 1) / 3,495 (Wave 2) respondents with a chronic condition

Main Concerns about the Outbreak

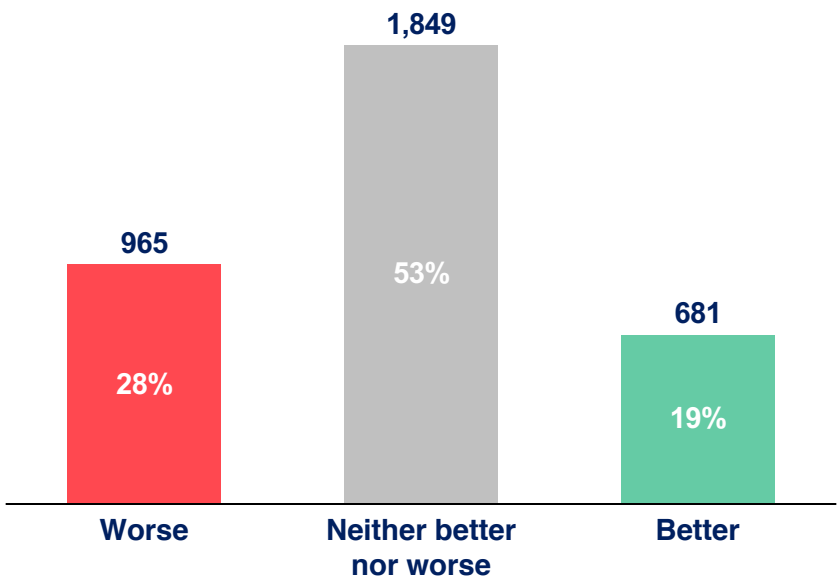


Base: 3,495 respondents with a chronic condition

Physical and psychological well-being since end of lockdown



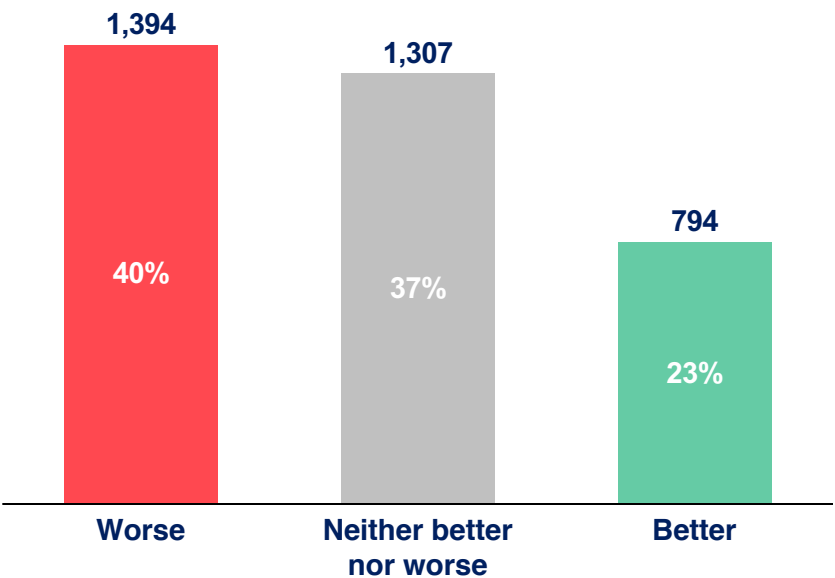
Physical well-being



72% of patients reengaged in a physical activity



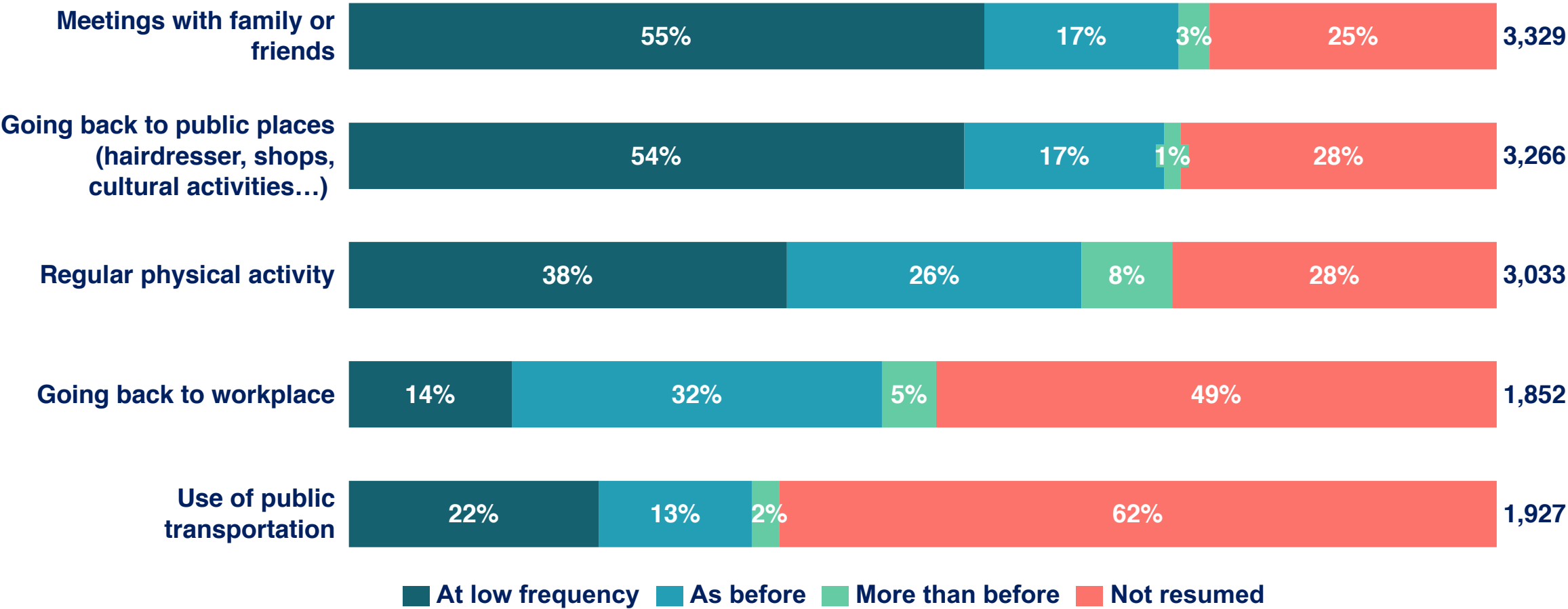
Psychological well-being



75% of patients started seeing family and friends again

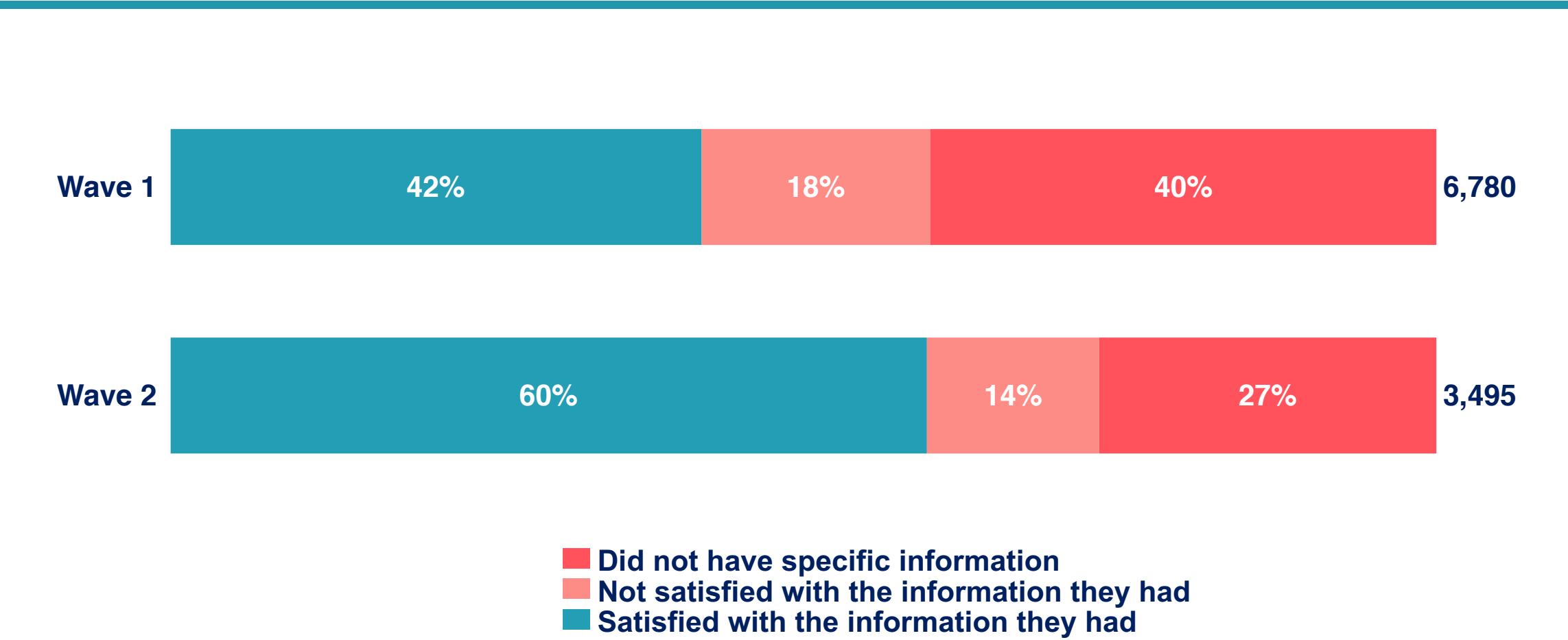
Base: 3,495 respondents with a chronic condition

Resuming of activities post lockdown



▪ Base: 3,495 respondents with a chronic condition

Patient Satisfaction with Information Wave 2 vs Wave 1



▪ Base: 6,780 (Wave 1) / 3,495 (Wave 2) respondents with a chronic condition



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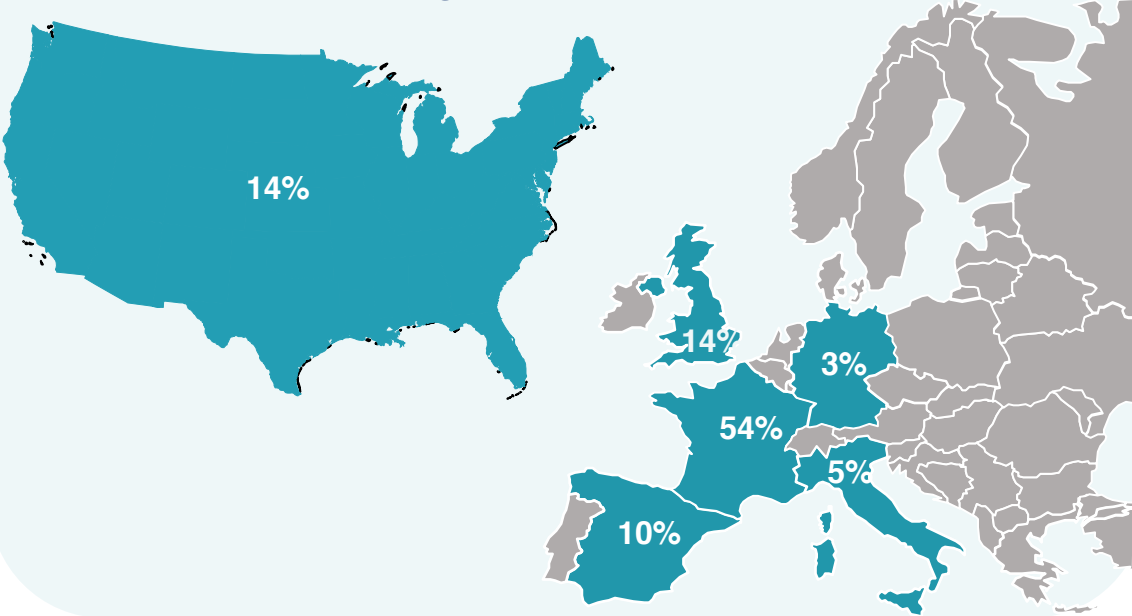
Summary of
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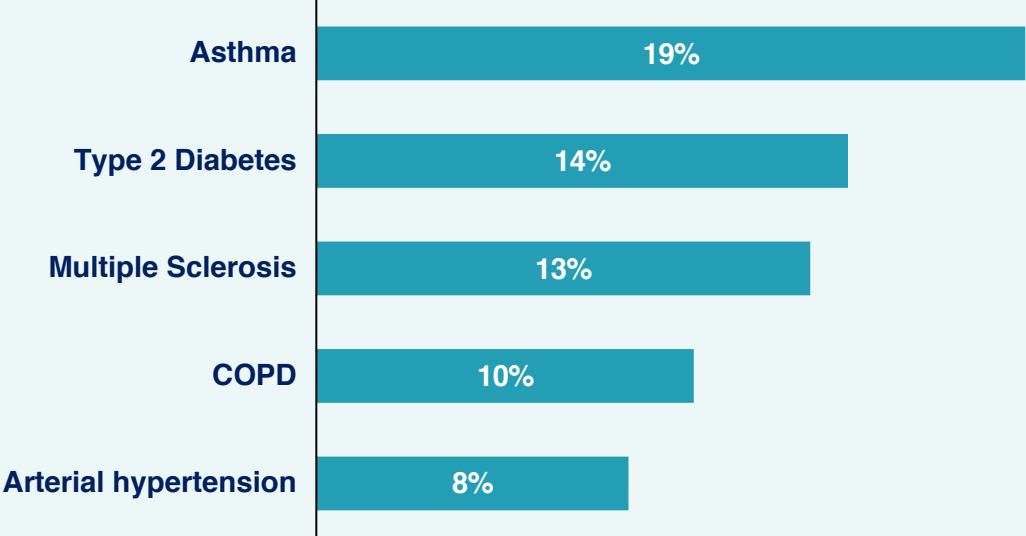
Q&A

Key Findings

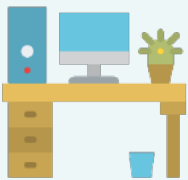
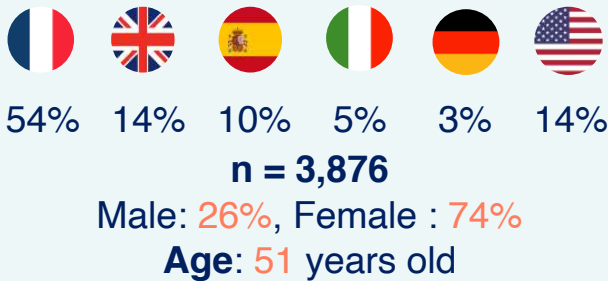
Geographical distribution



5 main chronic illnesses



Summary of Patient Population



43% were professionally impacted
(short-time working, homeworking, sick leave, paid or unpaid leave...)

Wave 2 Key Findings with Comparisons to Wave 1

Adhering to health authorities' recommendations

Respondents adherence to health authorities' recommendations **have decreased when compared to Wave 1** although access to masks and hand sanitizers **have increased since the lockdown**

41% of respondents had **difficulty finding masks during lockdown** as compared to **9%** since the lockdown

43% had **difficulty finding hand sanitizer** as compared to **12%** since the lockdown

Impact on medical consultations

24% of respondents **had difficulty finding an available doctor** during lockdown compared to **13%** since the lockdown

27% of respondents **used telehealth for their office visits** as suggested by their doctors and **83%** were **satisfied** with their telehealth visits. **63%** of respondents that used telehealth said they would use it again in the future

Impact on treatment adherence

21% of respondents' treatment adherence was modified and among those **40%** stopped their treatment for their chronic illness

29% of respondents experienced a **slight deterioration of their health due to care disruption** and **9%** a severe deterioration while **32%** reported that their health remained stable

26% **stopped their treatment** for prevention because their treatment put them at risk for COVID-19

Impact on stress and isolation

Respondents' **stress and social isolation** has decreased compared to Wave 1

26% of respondents reported **having concerns about the risks related to their chronic illness** as compared to **38%** in Wave 1

54% of respondents **started going out to public places again** and **75%** of respondents **started seeing family and friends again**

The Carenity COVID-19 Study Continues...

Carenity’s COVID-19 Study Wave 3

- The study will continue with additional results in Wave 3
- Carenity will continue to share the results via webinar
- Please contact us for additional information, [patient insights](#) or [real world evidence research](#)

Carenity Provides Customizable Studies

- | | | |
|-----------------------|-------------------------|-------------------|
| • Therapeutic area | • Patient Journey | • Custom Analysis |
| • Country | • Barriers to Treatment | • Timeline |
| • Treatment Adherence | • Stress Levels | • Therapy Type |



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Q&A

Q&A

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The Patient's view

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