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COVID-19 Healthcare Market Research Update

Week of March 30, 2020





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COVID-19 HEALTHCARE MARKET RESEARCH UPDATE

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AUTHOR: DAWN PALACE, PHD, SVP

As COVID-19 continues to grip the globe, I've been struck by how societal reactions have mirrored what we so often see in patient journey work during the diagnosis phase: An initial period of fear, disillusionment and losing one's feet...accompanied by countering emotions of hope, determination and action orientation to overcome.

As humanity struggles with a new reality framed by risk of COVID-19 contraction, fear of strained medical capabilities, adjustment to sheltering in place, and chatter around economic depression...the world is also rising in unified determination to address needs.

This week:

- Physicians and nurses united in the Stay Home, Stay Safe social media campaign.
- Media continued reinforcing educational messages, such as the Flatten the Curve campaign.
- Additional governments encouraged social distancing or implemented lockdowns.
- And significantly more people started to "get it," characterizing COVID-19 as a serious threat.

Source: [Coronavirus Physician & Patient Perspectives](#)

Our third edition of Escalent Health's COVID-19 Market Research Update Newsletter presents articles addressing tension and conveying hope to help you navigate the pandemic as a whole person, inclusive of your personal and market researcher self. Stay Home, Stay Safe and Be Well.

In this issue:

- 1 Anticipating the Impact of COVID-19 to HCPs
- 2 Global Markets Update
- 3 The Moments of Truth in My Early COVID-19 Work-from-Home Journey
- 4 More Stories That Move People and Business

Anticipating the Impact of COVID-19 to HCPs

AUTHOR: LIZ GEORGE, SENIOR DIRECTOR

With COVID-19 rapidly changing the landscape of hospitals and medical practices, providers across specialties are adapting their care to strive for the best outcomes possible.

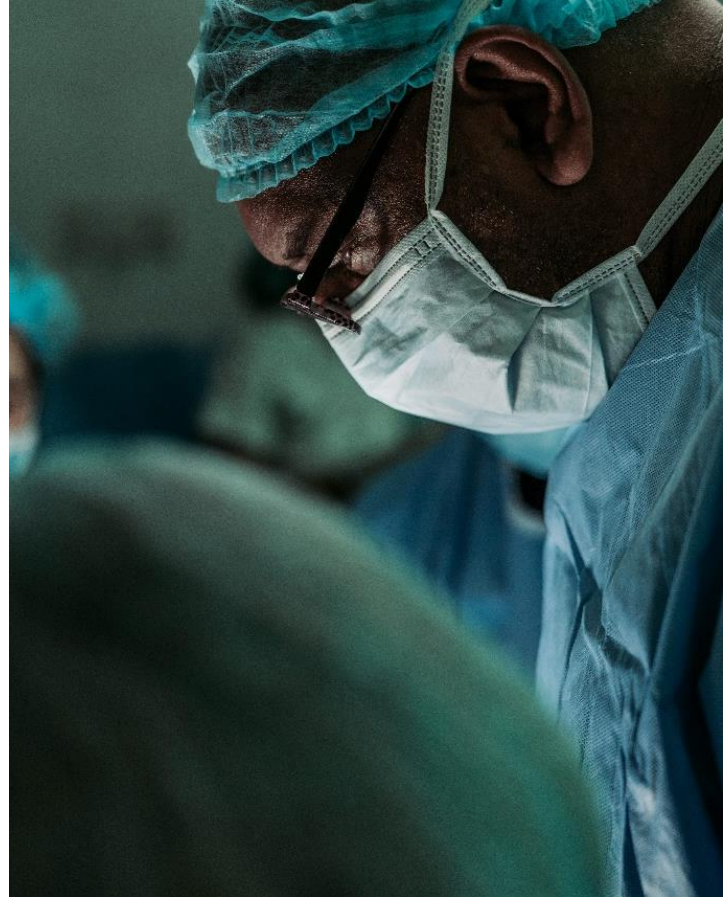
Emerging Guidance

Leading physician associations are updating guidelines and practice recommendations as well as advocating for their memberships with local and federal agencies. Recent publications emphasize efforts to screen for COVID-19, delay routine care, suspend non-emergent procedures, ration personal protective equipment and adapt visitor and staffing policies.

- [National Comprehensive Cancer Network](#) published extensive recommendations based on Seattle's response, including prioritization of surgical intervention in the interest of preserving critical PPE, staffing and bed capacity (citing the example that several months of endocrine therapy and delay of surgery may be appropriate for some patients with early stage HR+ breast cancer).
- [American Society for Reproductive Medicine](#) has recommended that practices suspend most fertility treatment cycles, including considering cancellation of embryo transfers.
- [American Academy of Pediatrics](#) is encouraging the use of tele-medicine platforms for assessment of acute and chronic illnesses, and exercise of appropriate discretion for scheduling of well-child visits and vaccinations; the organization is releasing regular videos with guidance on topics like managing complex medical conditions during COVID-19 and infection control practices.

Alongside these recommendations, medical associations are discussing the challenges of providing care under such provisions.

(continued on next page)



"In the United States, we are fortunate to provide care for patients with cancer in a resource-rich environment with state-of-the-art, lifesaving treatments.

However, the reality of diminishing supplies and hospital resources in the face of the COVID-19 pandemic is a departure from our usual state.

The potential threat of COVID-19 to our immunocompromised patients as a result of their disease or the treatment we provide is thought to be significant, tipping the usual risk-benefit balance in extreme ways."

—JNCCN, [Cancer Care During COVID-19](#)



Anticipating the Impact of COVID-19 to HCPs (cont'd)

Potential Impacts to Industry and Market Research

As communities work proactively to limit the negative impact of COVID-19, it is important as a health community to anticipate what may evolve, even when the pandemic begins to resolve:

- **HCPs may be less accessible for market research:** When it is safe to resume routine care, practices may be overwhelmed with rescheduling procedures, assessments and visits that were missed during the crisis—potentially impacting typical availability for participation.
- **Treatment habits and considerations may have shifted:** Providers are weighing different treatment dynamics, as COVID-19 introduces a different risk-benefit assessment (based both on risk to individual patients with compromised immunity due to disease or treatment and on risk to burdening the health system while stressed). The outcomes of these decisions will carry past the pandemic, as HCPs address these outcomes and reassess their treatment algorithms.
- **Burnout may impact beliefs and sentiment until normalcy is sustained:** HCP burnout is already a notable concern, as providers balance the difficulty of care with lack of resources and are unable to connect to their support network for fear of exposure; such burnout is known to have lasting effects on retention and recruitment in the medical field.

Rising to the Challenge

Healthcare is leveraging technology in new ways that may have a positive impact for the system and market research moving forward:

- **Receptivity to rapid innovation:** Hospitals, systems and associations are developing new protocols in record time to address the crisis, sharing information openly and rapidly advancing collaboration.
- **Opening up virtual communication and connected care:** Practices are leveraging tele-health services to monitor chronic patients, a model that could lead to transformative management capabilities while also providing new data sources as providers become more experienced with virtual communication.
- **Exposure to new fields and treatments:** Hospitals are flexing capacity, expanding critical services, and may be asking providers to work outside of their given specialty—these factors may open up exposure to different HCP interests and awareness/adoption of different treatments, and alter belief systems that affect HCP decisions.
- **Goodwill efforts abound:** Organizations are working to offer flexible mental health support to HCPs through multiple channels, and businesses are offering logistical support through food delivery and childcare, demonstrating strong support for those on the frontlines. Those of us who work closely with providers should explore feasible ways to “give back” to providers today, to help reduce their burden and increase resiliency for HCPs.

Challenges to Long-Held Truths and Paradigm-Shifting Innovation

As a healthcare researcher—and simply as an empathic human—I’m concerned for our HCPs facing these challenges. As we learn more about COVID-19 and practices adapt to meet evolving demands, we need to appreciate how the changes and outcomes will impact providers long term. Researchers must consider that long-held “truths” about HCPs may change and be prepared to learn and innovate through our future research assumptions, design and methods. I look forward to collaborating with my clients and the patients and HCPs we have discussions with to smartly navigate the inevitable paradigm shifts in a post-COVID-19 world.

Global Markets Update

AUTHORS: BETH CAREY AND CHERYL PFAFFMANN, RESEARCH MANAGEMENT

The past week saw most countries ramp up social distancing measures to curb the spread of COVID-19. As a result, we do not recommend face-to-face (F2F) research at this time. Specific to HCPs, it remains possible to field web-based HCP research in most markets; however, in countries with stressed medical services a longer recruitment/field window may be required. Patients continue to respond to web-based research requests at normal or slightly increased rates. Some call center (telephone) research has slowed due to work-from-home orders.

	Change vs. Last Week	Face-to-Face Qualitative	Phone and Web Qualitative	Quantitative Response Rates (RR)	Country Status
USA	▼	No	Yes	Normal	National state of emergency, entry bans, a majority of US states sheltering in place
CAN	▼	No	Yes	Normal	Entry bans, US-Canada joint restriction on nonessential travel, physical distancing
DE	▼	No	Front line HCPs limited	Normal	Entry bans, no gatherings of more than two people; restrictions of F2F interviews expected through end of April
ESP	■	No	Patients only	HCPs: Lower RR, add 1–2 weeks to field	State of alarm through April 12, entry bans, lockdown, medical services stressed,
FR	■	No	Front line HCPs limited	Normal	Confinement order through March 31, entry bans, proof of need for local travel; medical services significantly strained
ITALY	■	No	Patients only	Normal	Lockdown, proof of need required for local travel, medical services significantly strained
JAPAN	▼	HCPs: Limited Patients: No	Yes	Normal	Entry bans, social distancing; Olympics postponed until 2021
CHI	▲	Limited	Yes	HCPs: Lower RR, add 1–2 weeks to field	Entry bans/quarantines, social distancing, MR working in offices but caution remains high

Fieldwork capability: ▼ Worsening ▲ Improving ■ Similar to last week

Source: [Travel.State.Gov](https://travel.state.gov)


The Moments of Truth in My Early COVID-19 Work-from-Home Journey

AUTHOR: ALEX BONELLO, DIRECTOR

If you ask anyone who has worked with me, they'll tell you that I'm a big fan of being in the office. I love the people I work with, I love the connection and I love having my dedicated workspace. I never imagined that I not only would be working from home full-time, but doing so with my husband and our 18-month-old office assistant. It hasn't been easy, but I've shared some definite "wins" both at home and with my team so far!

This is not what I meant by "working mom"...

Last week, I took to social media to share in the widespread commiseration about the shift to working from home...

 Alex Bonello
Thursday at 8:46 AM · 🌱

There are two types of people right now, those who are desperate to find ways to workout while gyms are closed and people who ate their 2 week stockpile in 2 days...with the exception of my toddler who is BOTH, having not stopped running in circles around the house while screaming "SNACK!" #toddlersofcovid19

...and that's the tame version of the frustration I've felt while juggling working from home, parenting, dog-wrangling and coordinating meeting schedules with my husband, who is working 20 feet away from me.

Feeling connected is easier than I expected.

This is hard for so many reasons, but the best part? I'm not alone, far from it, actually. With colleagues, clients and friends all making the change to working remotely, it has been an ironically connecting experience.



Part of our team catching up with our "littles" before getting down to business!

With the right approach, I can do this!

Over the years, I have sought out tips for occasionally working from home. There are tons of resources out there; here's one great [list](#).

But this, this is different.

We are juggling all of our roles simultaneously and in isolation. This warrants a whole new set of [tips and tricks](#). Below are a few strategies from our team to strike the right balance of remaining productive while navigating this entirely new working environment.

SET HOME-OFFICE HOURS

Many of us have interruptions in our home that aren't conducive to a productive work environment—kids, pets, spouses, etc. Agreeing on a few hours a day (whether simultaneous or spread apart) that are your focus hours can be really helpful. We're not all going to be at peak performance all day given the circumstances, but if you can commit to yourself and your team when they can count on having your undivided attention, it goes a long way. As any mom will tell you, you can accomplish a LOT in 30 minutes if you have to!

ISOLATION ≠ DISCONNECTION

Part of our team has adapted our weekly calls to video calls to get some much needed face-to-face interaction. We took time up front to let our kids (or pets) hop in to say hi to the group. Not only did it allow us to see each other, it allowed our family to feel included in our workday. Additionally, our team has been using virtual collaboration tools, including virtual white-boarding and workshopping. If you have a need, we can help!

TRADE A "DECLINE" FOR AN EMAIL

When this all began, I saw lots of jokes about how we'd see how many meetings could really have been an email. And while funny, it is true. As a lover of collaboration, I'm in no way hating on the good ole' meeting. But working from home with a toddler tugging on my arm has forced me to think hard about which meetings *need to be calls* and which we can resolve (maybe a tad less efficiently but much more quietly) via email. The goal is to provide quality in whatever way you're able.

GIVE YOURSELF SOME GRACE

Maybe the most important thing you can do is give yourself some grace. None of us are doing this perfectly but we are all doing it. Working in the health industry is a privilege and our sacrifice to work among chaos within our home is far less than those we study who are working in a far scarier chaos every day. Be proud of the good you're doing by staying home—we've got this!

More Stories That Move People and Business

AUTHORS: STACY SIMS, DIRECTOR AND ALEX GRAY, VP

At a time when the world is facing the largest healthcare crisis most of us have seen, we at Escalent are truly in awe of the ingenuity, collaboration and perseverance we are witnessing all around us. Even more so than last week, our news feeds are filled with stories of humans from all walks of life, coming together to help save lives in their own way. These stories keep us energized. We hope they do the same for you.

Spotlight: News from the Frontline

Despite a national shortage in personal protective equipment (PPE), healthcare providers [at Henry Ford Health System](#) in Detroit, Michigan, aren't letting that stop them from caring for patients and saving lives. The staff have taken this shortage as an innovative challenge and began creating their own PPE to protect themselves while they wait for the supplies to replenish.

"It's a very crafty and helpful way to replace what we don't have," Mocer said. "I think it's phenomenal that we are coming together as a system and doing something about this problem. We have to do everything we can to keep our teams healthy so they can continue caring for our patients in need."

-Alex Moerci, product designer at Henry Ford Innovation Institute

Survey Says!



KFF found that more women than men worry about losing income due to a workplace closure or reduced hours.

Source: [KFF Coronavirus Poll](#)



The Commonwealth Fund survey found that nearly all US adults (87%) wanted to be tested for COVID-19.

Source: [Commonwealthfund.org Survey Results](#)



M3 reported another increase in the proportion of HCPs and patients who view COVID-19 as a severe threat.

Source: [Coronavirus Physician & Patient Perspectives](#)



America Leaning in to Get Things Done!

Cruise lines convert to floating hospitals



Carnival Cruise proposed use of its cruise ships to treat non-COVID-19 patients as temporary health care facilities in an effort to free up hospital space and increase capacity to treat those in need.

Source: [USA Today Carnival Cruise](#)

Companies, individuals stitch masks, hospital gowns



Detroit Sewn, a Pontiac, Michigan-based sewing company, has partnered with Trinity Health to produce 50,000 masks.

Source: [50,000 Masks Detroit Sewn](#)

Distilleries make alcohol-based hand rub products



Typically making gin, bourbon, vodka and whiskey, distilleries across the country have refocused their efforts to manufacture WHO-approved recipes for hand rub.

Source: [WHO Guide to Local Production](#)

Hospitals, pharma offer drive-through COVID-19 testing



To bolster testing efforts across the country, many hospitals and clinical partners have deployed drive-through COVID-19 testing services.

Source: [Business Insider Drive-Through Testing](#)

Automotive re-tools to make ventilators



GM, Ford, Fiat Chrysler and Tesla are among those working on a solution to leverage their logistical, purchasing and manufacturing expertise to produce more life-saving ventilators.

Source: [GM Newsroom](#)

Celebrities support local communities



The outpouring of responses from athletes and sports owners has been strong. Mark Cuban, owner of the Dallas Mavericks NBA team, is paying Stadium employees during closures.

Source: [Dallas Mavs Announcement](#)

Mental, physical wellness goes online



As gyms and other non-essential services close across the country to reinforce social distancing, many individuals and organizations are now offering access to cooking classes and workouts online. Here are at-home activities to help you maintain your mental and physical wellness.

Source: [Best At Home Workouts To Try](#)

We've Got This!

Our creative team of health-focused experts understands your needs and are at-the-ready with tried and true alternatives to in-person research, meetings and workshops. And we have innovative ideas, too! We'd love to be an extension of your team for ideation, consultation and action planning as you continue to put patients first during the COVID-19 outbreak.



About Escalent

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