

2022 Apollo Healthcare Predictions

Based on insights and analysis from our annual physician survey

February 9, 2022



At Apollo Intelligence, we're on a mission to accelerate health innovation to improve life!



In 2019, Apollo Intelligence (Apollo) invested in InCrowd, InCrowd is the pioneer of real-time insights in the life sciences industry, delivering unprecedented quality and speed to insight.



To complement InCrowd and strengthen our global reach, in 2020 we acquired Survey Healthcare Global (SHG), the global market leader in healthcare data collection and custom survey solutions, offering unrivaled global access to healthcare professionals.

Our brands represent major advances in technologies that work together to bring faster insights for innovations in healthcare.



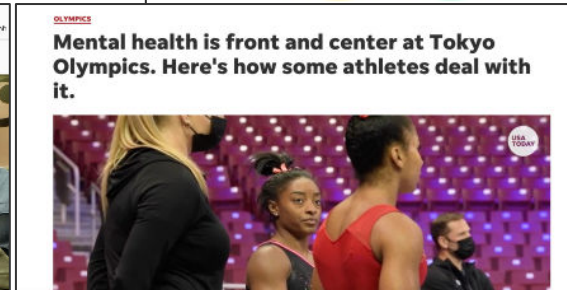
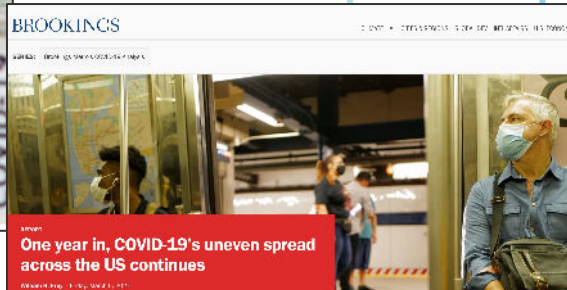
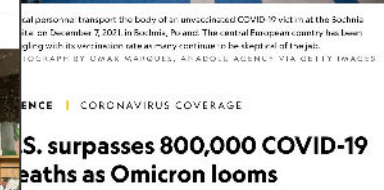
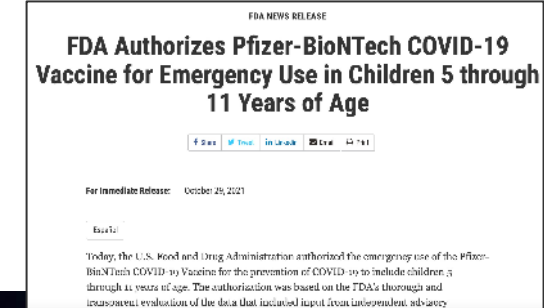
2021 Predictions Revisited

For 2021, physicians predicted...

- Drug affordability, treatment access, and physician burnout would be the top three issues to prioritize
- The US would find it difficult to achieve COVID-19 herd immunity
- Accelerations in health-tech expected to drive improvements in care but posed significant data and privacy risks
- European physicians were focused on the need for more drug innovation and healthcare research funding
- Both US and European physicians predicted strong success with COVID vaccine and were optimistic about returning to normal
- Widespread vaccine roll-out, both US and European physicians noting as the top critical need
- The toll on healthcare providers would be significant due to pandemic, with a third already experiencing pervasive loss and 47% enduring some form of burnout



Looking Back on 2021



January February March April May June July August September October November December



Methodology




2022 Survey Details

- **Method:** 7-Minute Survey
- **Crowd:** US & European Physicians (Mainly PCP, Oncs, Rheums, Neuros, Cards, and Others)
- **Fielding Period:** January 1-2, 2022 (closed under 10 hours)



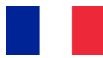




European Comparison

A selection of survey questions is compared to an international dataset, consisting of n=235 physicians across the UK, Italy, Spain, Germany, and France, Jan 2022 and n=974, Jan 2021

Logistics Year-Over-Year

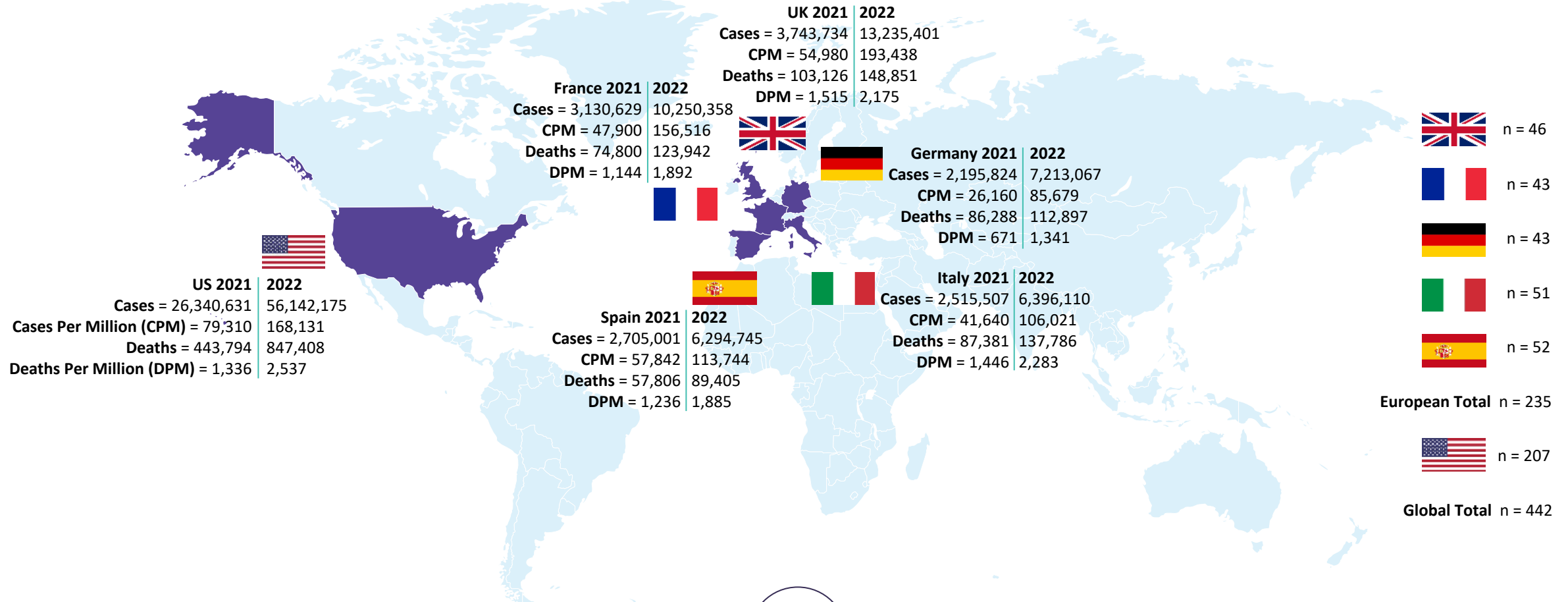
|  Survey |  Fielding Period |  Total US Crowd |
|--|---|--|
| 2022 Survey | Jan 2022 | 207 |
| 2021 Survey | Jan 2021 | 219 |
| 2020 Survey | Jan 2020 | 201 |
| 2019 Survey | Jan 2019 | 200 |
| 2018 Survey | Nov 2017 | 203 |
| 2017 Survey | Dec 2016 | 150 |
| 2016 Survey | Nov 2015 | 118 |

2022 Crowds

|  2022 Physicians |
|---|
|  n=46 |
|  n=43 |
|  n=43 |
|  n=51 |
|  n=52 |
| European Total n=235 |
|  n=207 |
| Total n=442 |



Global Audiences & COVID



Findings

Hopes for Pharma Industry in 2022

Though lower patient costs is still by far the top aspiration, in 2022 US physicians have more demands for pharma with COVID treatments and vaccines surpassing some perennial hopes.

Q2a

What important changes would **you most like to see** in the pharmaceutical industry in 2022?

US Only

| Responses <small>Unaided Mentions</small> | 2022 n=207 | 2021 n=219 | 2020 n=201 | 2019 n=200 | 2018 n=203 | 2017 n=150 | 2016 n=118 |
|---|---------------|---------------|---------------|---------------|---------------|---------------|---------------|
| Lower price to patient/improved coverage | 60% | 67% | 86% | 76% | 78% | 78% | 54% |
| Increase development & discovery | 5% | 11% | 6% | 5% | 8% | 8% | 4% |
| Improved access programs | 8% | 8% | | | | | |
| More generics | 10% | 7% | 7% | 7% | 5% | 4% | 8% |
| Less bureaucracy/government regulations | 8% | | | | | | |
| Less DTC marketing and sales reps | 3% | 7% | 10% | 9% | 9% | 7% | 4% |
| More transparency | 5% | 6% | 9% | 9% | 4% | 1% | 4% |
| Advancements in technology and care | 5% | 2% | | | | | |
| More COVID treatments and vaccines | 6% | | | | | | |



Predictions for Pharma Industry in 2022

Consistent with last year, more than anything else (32%), physicians believe nothing will change. Those who do envision change see drug prices rising (18%), new drug approvals (13%), and an increase in COVID-focused treatments (9%).

Q2b

What changes do you **realistically predict we will see** in the pharmaceutical industry in 2022?

US Only

| Responses <small>Unaided Mentions</small> | 2022 n=207 | 2021 n=219 | 2020 n=201 | 2019 n=200 | 2018 n=203 | 2017 n=150 | 2016 n=118 |
|---|---------------|---------------|---------------|---------------|---------------|---------------|---------------|
| No significant changes | 32% | 32% | 59% | 60% | 65% | 74% | 42% |
| Rise in drug prices | 18% | 20% | 29% | 20% | 24% | 23% | 24% |
| New drug approvals | 13% | 9% | 12% | 8% | 6% | 5% | 4% |
| Increased focus on COVID treatments | 9% | 6% | | | | | |
| Decreased drug prices | 7% | 5% | 6% | 6% | 2% | 1% | 0% |
| More DTC advertising and profit drive | 7% | 1% | 10% | 5% | 8% | 5% | 4% |



Hopes for Healthcare Industry in 2022

Q1a

What important changes would **you most like to see** in the healthcare industry in 2022?



Both American and European physicians would like to see more telemedicine in healthcare as their top priority in **2022**, innovation in the space, remote monitoring, and reimbursement for US doctors.

In **2021**, more than half (51%) of US respondents were hoping for better cost of care for patients, and European physicians' top ask was for a return to normalcy (17%).

| Responses Unaided Mentions | US Physicians n=207 | European Physicians n=235 | Responses Unaided Mentions |
|---|---------------------|---------------------------|---|
| Telemedicine (better telehealth, reimbursed telehealth, etc.) | 22% | 23% | Telemedicine (better telehealth, remote monitoring, etc.) |
| Reduced Cost of Care | 22% | 18% | More staff, competent staff |
| More access to care for patients | 19% | 16% | Better pay, more recognition for HCPs |

Reality for Healthcare Industry in 2022

Q1b

What changes
do you
**realistically
predict we will
see** in the
healthcare
industry in
2022?



This is the first year that we've seen the change that most physicians would like to see happen in healthcare, align with the change most respondents believe will happen (after no changes).

Telemedicine tops both the hopes and predictions lists for US and European respondents in 2022, with 19% of US physicians and 25% of European physicians predicting its expansion and evolution in 2022.


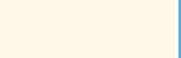





| Responses Unaided Mentions | <i>US Physicians n=207</i> | <i>European Physicians n=235</i> | Responses Unaided Mentions |
|--|------------------------------------|--|---|
| More telemedicine (reimbursement, monitoring, etc.) | 19% | 25% | More telemedicine (innovation, etc.) |
| Physician burnout, staff issues | 12% | 24% | Physician burnout, lack of resources including staff |
| Increase in COVID- related issues | 11% | 11% | Mandatory COVID-19 vaccinations |
| Nothing | 24% | 25% | Nothing |

Endemic or Not?

COVID-19 is endemic, according to **76%** of **all 442 physicians** surveyed. **Seventy-three percent of US** and 79% of European physicians surveyed believe COVID is now endemic. The most optimistic nations were France and Spain, with 33% and 31% respectively believing we would get back to a pre-pandemic world. Germany (88%) and Italy (86%) had the strongest agreement with COVID now being endemic.

Q2

Do you anticipate that we will ever get back to a pre-pandemic world or do you think COVID-19 is now endemic?

| |  US Physicians n=207 |  European Physicians n=235 |  n=43 |  n=43 |  n=51 |  n=51 |  n=46 |
|-----------------------------|--|--|---|---|---|---|---|
| COVID-19 is now endemic. | 73% | 79% | 67% | 88% | 86% | 69% | 83% |
| We will get back to normal. | 27% | 21% | 33% | 12% | 14% | 31% | 17% |


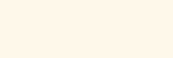







US & European Vaccine Views

Assuming COVID-19 is endemic, **84%** of all respondents surveyed worldwide, believe the COVID-19 vaccine will become a part of the childhood vaccine schedule. Eight-six percent of US and 83% of European physicians reported as such. With nearly **one in three** in the UK believing it will **not be part** of the **schedule**.

Q2b

Assuming COVID-19 is/becomes endemic, do you expect that the vaccine will become part of the childhood vaccine schedule?

| |  US Physicians n=207 |  European Physicians n=235 |  n=43 |  n=43 |  n=51 |  n=51 |  n=46 |
|---|--|--|---|---|---|---|---|
| Yes, the COVID vaccine will be part of the childhood schedule. | 86% | 83% | 77% | 91% | 94% | 83% | 70% |
| No, the COVID vaccine will not be part of the childhood schedule. | 14% | 17% | 23% | 9% | 6% | 17% | 30% |



Perceived Importance of Industry Changes

Making therapies more affordable dropped significantly as a priority in the last year, as did improving wider access to available therapies, with addressing burnout rising as a priority.

Q3

Rank the importance of the following items or changes in the pharmaceutical industry that you feel are most critical to best meet the demands of our changing society.

US Only

KEY

2022

n=207

2021

n=219

Ranking 2022 Priorities by Importance n=207

Making therapies **more affordable** for patients *

Addressing burnout for healthcare professionals

Addressing the labor shortage in healthcare

Improving **wider access** to available therapies *

% RANKING HIGHLY (T2B)

45%

55%

36%

29%

14%

0%

24%

38%









Likelihood of Occurrences 1/2

Though American and European physicians have strong commonality in what they think is likely for 2022, significantly more US physicians believe it's likely that they will command more leverage for compensation in 2022 and that the year will see more patient resistance to vaccines and COVID-related treatments as misinformation escalates.

Q4

Tell us what you think is the likelihood of each of the following statements.

Predictions Physicians Find Likely

| |  (Top-2 Box) n=207 | Europe n=235 |  n=43 |  n=43 |  n=51 |  n=52 |  n=46 |
|--|---|--------------|--|--|--|--|--|
| Access to healthcare will improve. | 32% | 27% | 21% | 28% | 14% | 32% | 39% |
| Quality of healthcare will improve. | 38% | 29% | 28% | 25% | 30% | 30% | 33% |
| Costs of healthcare will improve. | 16% | 18% | 12% | 14% | 22% | 23% | 20% |
| COVID-19 will become an even more polarizing issue, with new variants continuing to spread more quickly through unvaccinated communities. | 83% | 78% | 77% | 77% | 86% | 75% | 74% |
| Regardless of the demand on healthcare systems due to COVID surges, communities will not lockdown in 2022. | 85% | 73% | 80% | 82% | 70% | 62% | 76% |
| Drug development will be faster in 2022 due to accelerated practices adopted for the COVID-19 vaccines. | 73% | 73% | 56% | 81% | 73% | 79% | 74% |
| 2022 will continue to see negative economic impact from COVID-19 with more and more people ill from more contagious variants (e.g., omicron and potentially others), unable to work. | 82% | 79% | 63% | 79% | 76% | 93% | 78% |
| 2022 will see greater collaboration between global governments and international health organizations to address the pandemic more effectively. | 57% | 59% | 65% | 65% | 55% | 48% | 68% |
| 2022 will see more patient resistance to vaccines and COVID-related treatments as misinformation escalates. | 75% | 54% | 35% | 54% | 49% | 62% | 67% |
| Healthcare workers will command more leverage for compensation in 2022. | 54% | 32% | 30% | 42% | 6% | 27% | 59% |



Thoughts on Compensation 2/2

Both American and European physicians express frustration over their lack of influence, the way they are treated, and their place in the decision-making process.

Q4

Tell us what you think is the likelihood of each of the following statements. Why do you feel the way you do about compensation?

Global

“

*“The nearly 2-year long pandemic has taken **its toll on healthcare workers and** there seems to be none of the direly-needed relief in sight.”*

— Neurologist,
US

“

*“The human factor does not seem to carry much weight in the heads of our decision-makers. **If they found the way to replace doctors, nurses, caregivers ... etc., by robots, [they] would do so immediately,** helped in this by the big capital.”*

— Rheumatologist
France

“

*“Because it is already demonstrated that the **health system has disinterest in improving the conditions of health personnel.***

— Rheumatologist,
Spain

“

*“... **doctors have no voice** in chapter on their salaries and 2 years of pandemic have highlighted how the remuneration situation has not changed.”*

— Neurologist,
Italy



Agreement Statements

Nearly twice as many US physicians (45%) are reporting burnout compared to their European counterparts (25%). While more than half of US respondents have concerns over the long-term impact of COVID on patients, just over a third in Europe share this concern.

Q8

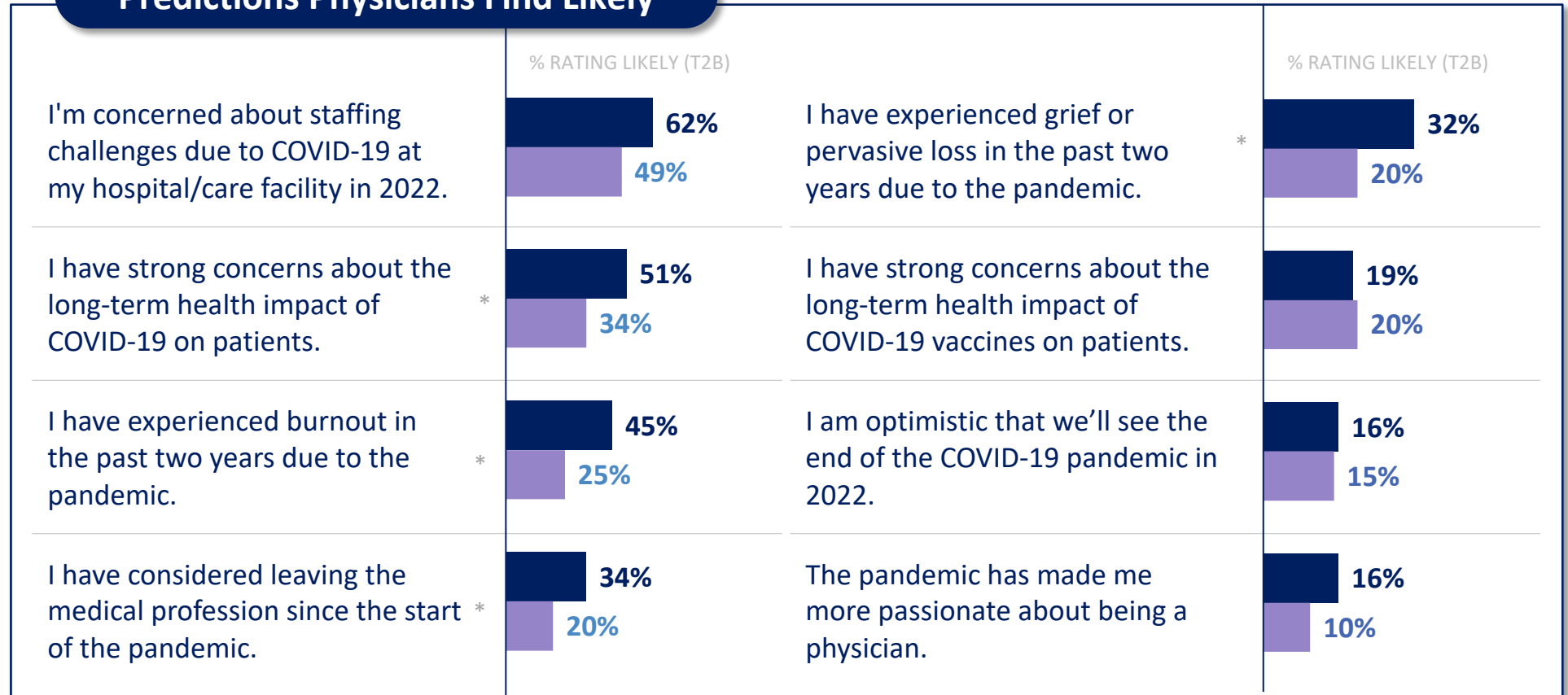
Please rate your level of agreement with the following statements, from strongly disagree (1) to strongly agree (7).

KEY



* Difference is statistically significant at the 95% confidence interval.

Predictions Physicians Find Likely



Agreement Statement

Twice as many US physicians than European report that they believe many more qualified healthcare professionals will leave their professions in 2022 due to COVID-19.

Q8

Please rate your level of agreement with the following statements, from strongly disagree (1) to strongly agree (7).

KEY



* Difference is statistically significant at the 95% confidence interval.

Predictions Physicians Find Likely

I believe many more qualified healthcare professionals will leave their professions in 2022 due to COVID-19.

*

% RATING LIKELY (T2B)



I believe that the pandemic has slowed progress for new therapies in my area of specialty.



Physicians Leaving Medicine

Both European and US physicians express concerns over continuous staffing issues plaguing public health and what it means for the society.

Q8

Please rate your level of agreement with the following statements. from strongly disagree (1) to strongly agree (7).

Global

“

“Nothing will devastate a community faster [than] **when there's no doctor available** for them when they are sick.”

— Rheumatologist,
US, CA

“

“The last two years has taken its toll on staff in healthcare and **a silent epidemic** could be about to happen. **PTSD** in key workers **who will be unable to sustain working under such pressures.** Inevitably ... NHS trusts should have duty ... **to look after staffs' health and wellbeing.**”

— General Practice,
UK

“

“We are heading to a new crisis of being unable to find educated and competent healthcare workers due to burnout and a poor environment. This will **lead to massive decline in public health.**”

— PCP
US, MT

“

“I think here a lot has to change. But **more important than the doctors are still the nursing staff.** Personally, I have looked after many Covid patients. But unlike the public service in Germany, I was mostly in [my] home office.”

— Neurologist,
Germany



Agreement Statements

Though the US physician burnout reporting is consistent from 2021 to 2022, nearly twice as many US physicians note having considered leaving medicine since the start of the pandemic from 2021 to 2022.

Q8

Please rate your level of agreement with the following statements, from strongly disagree (1) to strongly agree (7).

US Only

KEY



* Difference is statistically significant at the 95% confidence interval.

Predictions Physicians Find Likely

I have experienced burnout due to the pandemic.

% RATING LIKELY (T2B)

45%

47%

I have considered leaving the medical profession since the start of the pandemic. *

34%

18%

I have experienced grief or pervasive loss in the past two years due to the pandemic.

32%

32%

The pandemic has made me more passionate about being a physician. *

16%

24%



Key Takeaways

- Lower cost of care remains the top hope, but physicians share a wider range of priorities in 2022.
- Exploited, marginalized, and exhausted are just a few sentiments physicians shared to describe their experience in 2022.
- Many physicians are considering leaving medicine—18% of US physicians reported so in 2021, which has risen to 34% in 2022.
- Innovation for telemedicine has surpassed innovation for COVID-related therapies in 2022, as physicians report the pandemic evolving to endemic status.

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