

March 1, 2022

# ***COVID: Looking Back and Looking Forward***

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# Today's Session

This webinar will be broken into 3 sections:

- Looking Back on the Pandemic: How Did We Do?
- The Impact of COVID on the Healthcare Community & Community Health
- Looking Into the Future: The Transition to the Next-Normal

# Today's Speakers

Moderator:



**Victoria Elegant**

MAPS JAPAC President & VP and  
Region Head Medical, JAPAC  
**Amgen**

Panelists:



**Hahn-Ey Lee**

Country Medical Director  
**Pfizer Japan**



**Rohit Arora**

Medical Director  
**Eli Lilly & Company India**



**Sanjoy Datta**

VP Medical & Clinical - Greater  
China & Intercontinental  
**GSK Vaccines R&D**



**Yao Li**

Head of Medical Affairs &  
Pharmacovigilance, China  
**Bayer China**



**Hahn-Ey Lee**

Country Medical Director

**Pfizer**

# Looking Back on the Pandemic

How did we do?

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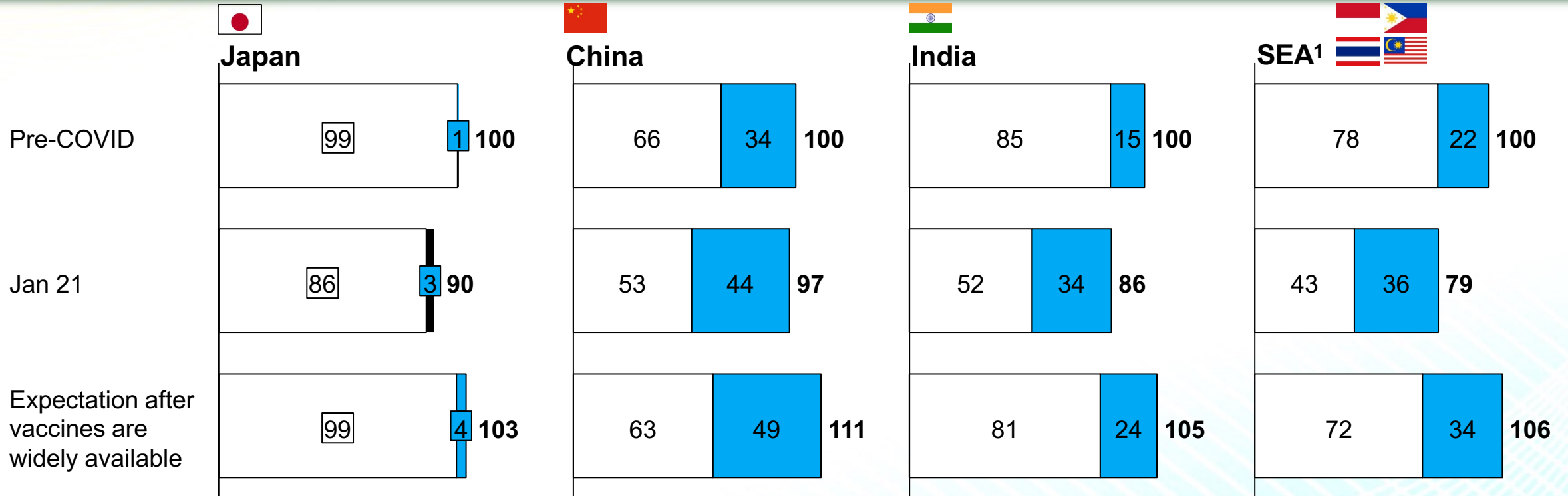


>> NOW SPEAKING: **Hahn-Ey Lee**  
Country Medical Director, Pfizer Japan

Support the evolving patient journey

# Looking Back on the Pandemic: How Did We Do?

## Remote consultation is increasing



Volume of consultations per month today, Indexed to 100 pre-pandemic for each country

□ In-person   ■ Remote

1. Includes Indonesia, Malaysia, Philippines and Thailand

Source: McKinsey January 2021 Asia Physician COVID-19 survey (N = 1200)



## >> NOW SPEAKING: **Hahn-Ey Lee**

Country Medical Director, Pfizer Japan

# The Impact of COVID on Digital Solutions and Partnerships



<b>Solution</b>	<b>Description</b>
Website function to realize early diagnosis of HAE on “AskDoctors”	Released a website of checklist to which patients who report symptoms that suggest HAE on “AskDoctors” are redirected which make them realize possibility of HAE
App for potential asthma patients and continuous treatment	Released an app which provides detailed disease information and appropriate actions to potential asthma patients to encourage continuous treatment
Pilot program for migraine patients receiving telemedicine	Started a pilot program to enable better communication between HCPs and patients and effective medical interview, while testing satisfaction in telemedicine
Pilot study to create an integrated IT system including telemedicine, EHR, PHR and ePRO	Aim to create an IT system integrating current regional network and disease management system and to contribute to improving diagnosis, treatment and management of asthma, COPD and SLE

### Source:

Company websites; literature search  
**DOCUMENT INTENDED TO PROVIDE INSIGHT BASED ON CURRENTLY AVAILABLE INFORMATION FOR CONSIDERATION AND NOT SPECIFIC ADVICE**



# >> NOW SPEAKING: Hahn-Ey Lee

Country Medical Director, Pfizer Japan

Support the evolving patient journey

## What We Learned from the Past Few Years...



	Industry shifts	Implication to pharmaco
<b>A Support the evolving patient journey</b>	<p><b>Patient visits have dropped</b> significantly - 74% of the physicians in Japan report drop in patient interactions</p> <p>Even though, it is still ~3% of the total consultation, <b>remote consultation is increasing</b> and expected to remain the same - larger hospitals have higher percentage of remote consultation, and expect continued impact</p>	Support future <b>patient journey shifts by solutions</b> that fit with the evolving clinical flow, potentially including partnership (e.g., delivery, telemedicine)
<b>B Change the way we engage with physicians</b>	<p>In-person engagement with MSLs has <b>dropped significantly (- 65%)</b> and ~1/3 of physicians believe in-person MSL interaction no longer necessary</p> <p>Although HCPs expects remote interaction, physicians in Japan show <b>low satisfaction</b> with the current remote interaction</p> <p>Japan remains a market where <b>most physicians want a lot of engagement</b> with pharma also post COVID – mostly for launch products</p>	Radical <b>reset of GtM model</b> : focus on user experience, <b>shift in resources with F2F</b> focused on launches, better content stack and supported by an agile operating model
<b>C Change the way we work</b>	<p><b>Witnessing several</b> examples of new ways of working in Japan (usage of digital channels, remote work etc.)</p> <p>Many companies have <b>challenges to legacy IT infrastructures and digital capabilities</b></p> <p>Increased willingness to adopt <b>RWE</b> within the industry</p>	<p><b>Strengthen IT and evolve talent and governance</b> to enable the changes</p> <p>Further strengthen <b>analytics capability</b></p>





**Rohit Arora**

Medical Director

Eli Lilly & Company India

# The Impact of COVID on the Healthcare Community & Community Health



>> NOW SPEAKING: **Rohit Arora**  
Medical Director, Eli Lilly & Company India

## Impact of Pandemic on Patients, Families and Communities



### **Patients & Families**

- Disruptions in Healthcare Delivery
- Disproportionate impact on marginalized populations (Impact on SDG goals)
- Physical, Mental and Behavioural Impact
- Long term impact on management of chronic diseases

### **Communities**

- Significant impact on diagnosis and treatment for non-COVID illness
- Overburden and underinvestment in community health
- Isolation and disconnection from community networks and support systems



>> NOW SPEAKING: **Rohit Arora**  
Medical Director, Eli Lilly & Company India

## The Pandemic Exposed Cracks in the Health Care Systems



- Underinvestment in Health Care Infrastructure
- Access to Care and inadequate focus on social determinants of health
- Healthcare Costs
- Inequalities and Structural Realism
- Cross Sectoral Partnerships



## Sanjoy Datta

VP Medical & Clinical – Greater  
China & Intercontinental  
**GSK Vaccines R&D**



## Yao Li

Head of Medical Affairs &  
Pharmacovigilance, China  
**Bayer China**

# Looking Into the Future

*The Transition to the Next-Normal*

# The pandemic isn't over!

- Different situations in our countries
  - Zero COVID vs. COVID endemic
  - Vaccination coverage
  - Booster doses
  - Treatments
- We can currently discuss trends but not certainties



## >> NOW SPEAKING: **Sanjoy Datta**

VP Clinical & Medical – Greater China & Intercontinental GSK Vaccines R&D

### Impact on the Patient



- Better informed
  - Differences between mRNA and other vaccines for prophylaxis, and monoclonal antibodies & antiviral for treatments, are now a part of general conversation!
- More independent
  - Doing self-tests (e.g. ART) and pulse-oximetry at home commonplace
- Tele-medicine
  - Almost every patient with access to a mobile phone has had some sort of a remote consult / advice over the past 2 years



## >> NOW SPEAKING: **Sanjoy Datta**

VP Clinical & Medical – Greater China & Intercontinental GSK Vaccines R&D

### Impact on the Practitioner



- Depending on specialities
  - Those who were swept off their feet vs. those who were left with postponed consultations / operations
- Virtual interactions
  - Tele-consults with patients
  - Virtual engagements at congresses or with industry



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VP Clinical & Medical – Greater China & Intercontinental GSK Vaccines R&D

### Industry



- Working rapidly to develop solutions
  - Accelerating innovation
  - Experience with EUA pathways
- Omnichannel engagement of stakeholders
  - 2 years ago, what proportion of MSL or Rep interactions were virtual?
- Which of these practices do we continue or stop as we enter the “new normal”?





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VP Clinical & Medical – Greater China & Intercontinental GSK Vaccines R&D

### What We Could See...?



- More virtual engagements being the norm?
  - Impact on MSL / Rep time saved on travel?
- Innovation being of greater value to the community?
- Vaccine hesitancy impact ...?
  - Could we see a greater prioritization and uptake of adult immunisations, recognizing the new public health challenges of shifting demographics?
- More collaborative stakeholders
  - Expedited Regulatory pathways from the learnings?



>> NOW SPEAKING: **Yao Li**

Head of Medical Affairs & Pharmacovigilance, China, Bayer China

## Pandemic impact in China is a bit different



- China has much shorter period of lock-down and disruption in commercial activities
- Virtual interaction becomes more and more important, but face-to-face interaction with physicians remains as a mainstream in China from the second half of 2020
- China policies change (VBP/NRD/DRG, etc.) impact pharma industry and drug innovation more than COVID-19



## >> NOW SPEAKING: Yao Li

Head of Medical Affairs & Pharmacovigilance, China, Bayer China

# Adopt tailored strategies to face the new normal



- Portfolio strategy
  - More considerable pipeline strategy when facing the impact after the pandemic
  - Integrate portfolio to better support unmet patient needs
- Digitalization
  - Right content and right content delivery
  - Capability evolution to fit in the new normal
- More innovative and diversified patient access
  - Channel orchestration (omni-channel) and resource allocation
  - Innovative interaction model among HCP/patient/industry



>> NOW SPEAKING: **Yao Li**

Head of Medical Affairs & Pharmacovigilance, China, Bayer China

Look into future, some emerging trends are arising as well



- Digital therapy: data + algorithm+ service
- AI empowered customer engagement
- Adjust business model to support carbon neutrality goals of hospitals by leveraging the experience in the pandemic
- Medical metaverse to increase the efficiency of patient & HCP interaction: mixed reality (on-line + off-line + virtual)

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