Executive Summary

COVID-19 Patient Insights

- Since last week’s COVID-19 insight report, global cases have increased by approximately 18%, however, recovered cases reached over 1 million.
- Looking at state level statistics on confirmed cases, Illinois has reported nearly 18,000 new cases representing a 34% increase, the most among the top ten states in our tracking.
- Demographic trends have remained consistent week over week.
- Hypertension, hyperlipidemia and T2DM continue to be the most common chronic comorbidities observed in patients diagnosed with Covid-19 infections.

Women’s Health Market Insights

- Given the broad range of impacts to women during the COVID-19 pandemic, we conducted further research into the female patient population to evaluate shifts in care delivery patterns.
- Procedure volumes for screening tests for breast cancer, cervical cancer, sexually transmitted diseases and osteoporosis have all dropped more than 50% compared to 2019 baseline metrics.
- Post-partum visits are declining at a faster rate compared to pre-natal visits.
- Infertility therapies have drastically declined since mid-March with only moderate increases in prescription activity in recent weeks.
- As states are beginning to reopen, our data indicates more investment in personal elective therapies based on prescription trends in Dermatologics, Sexual health, and Weight Management.

General Market Health Checks

- Week over week telemedicine visit trends have remained consistent with significant use for the management of diseases in the circulatory system and Neoplasms (Oncology).
- Cardiology continues to be the specialty most rapidly adopting the use of Telemedicine since stay at home orders were issued across the United States.
- Overall New and Total prescription counts continue to decline below normal reporting thresholds with week ending 5/1/2020.
- For the 6th straight week, “Elective Therapies” have dropped. Ophthalmic Preparations continue to experience the largest decline with a nearly 30% drop in week ending 5/1/2020.
- Mail Order prescription activity declined further with week ending 5/1/2020 while Retail prescriptions showed minimal change from the prior week.
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  – Overall Market Volume and Elective Therapies: Slides 24-25
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Latest COVID-19 Events
**May 1\(^{st}\)**

As people flock to beaches in California, Gov. Gavin Newsom declared there would be a “hard close” of state and local beaches in Orange County. Some state and local elected officials have pushed back against what they’ve said as broad measures that aren’t necessary in more remote communities.

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**May 5\(^{th}\)**

Disney Shanghai shares plans to reopen on May 11th.

No date has been set for reopening Disneyworld or Disneyland, however, Disney Parks Chief Medical Officer Dr. Pam Hymel stated they are working with the CDC on new health and safety measures.

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**May 5\(^{th}\)**

Beef suppliers across North America are currently facing production challenges impacting grocery store chains, fast food restaurants and Wholesalers.

One in five Wendy’s were out of beef and Costco is limiting purchases of meat.

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**May 7\(^{th}\)**

UnitedHealth Group will make more than $1.5 billion in financial assistance available to its members.

The plan will include premium credits (between 5% to 20%) put toward June premium billings.

The insurer will also waive cost-sharing for all primary care physician and specialist visits until at least September.

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**May 7\(^{th}\)**

Unicef called for governments to maintain lifesaving services for pregnant women and newborns that are under increasing threat from strained health services and supply chains.

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Sources:

https://www.fiercehealthcare.com/payer/unitedhealth-to-offer-1-5b-financial-support-to-members-including-premium-credits
Since last week’s COVID-19 insight report, global cases have increased by nearly 587,000 cases or approximately 18%.

This week recovered cases reached over 1 million, increasing by over 217,000 cases or 26% since last week’s COVID-19 insights report.

Confirmed Cases
3,861,697

Deaths
269,867

Recovered
1,066,068
COVID-19 INSIGHTS

Confirmed Cases in the USA

• Confirmed cases of COVID-19 increased by nearly 187,000 from May 1st, 2020 to May 8th, 2020, representing an increase of roughly 15%.

• Louisiana is no longer on the Top 10 list for confirmed cases (replaced by Connecticut).

• Since last week’s Insights, Illinois has garnered nearly 18,000 new cases representing a 34% increase, the most among any top 10 state.

<table>
<thead>
<tr>
<th>State/Territory</th>
<th>Confirmed Cases</th>
<th>Deaths</th>
</tr>
</thead>
<tbody>
<tr>
<td>New York</td>
<td>327,469</td>
<td>26,144</td>
</tr>
<tr>
<td>New Jersey</td>
<td>133,991</td>
<td>8,807</td>
</tr>
<tr>
<td>Massachusetts</td>
<td>73,721</td>
<td>4,552</td>
</tr>
<tr>
<td>Illinois</td>
<td>70,871</td>
<td>3,111</td>
</tr>
<tr>
<td>California</td>
<td>62,360</td>
<td>2,546</td>
</tr>
<tr>
<td>Pennsylvania</td>
<td>55,956</td>
<td>3,589</td>
</tr>
<tr>
<td>Michigan</td>
<td>45,745</td>
<td>4,345</td>
</tr>
<tr>
<td>Florida</td>
<td>38,828</td>
<td>1,600</td>
</tr>
<tr>
<td>Texas</td>
<td>36,047</td>
<td>985</td>
</tr>
<tr>
<td>Connecticut</td>
<td>31,784</td>
<td>2,797</td>
</tr>
</tbody>
</table>

Latest with COVID-19 Diagnoses: Demographics & Comorbidities
Through patient activity observed for diagnosis, testing, exposure or symptoms of COVID-19 infection, PRA is now tracking about 959,714 patients during the time period Feb 4, 2020 to Apr 30, 2020.

- This is an increase of over 330,000 patients in the United States added to our Cohort for trend monitoring.

- Amongst the 157,649 COVID-19 diagnosed patients, trends on consistent week over week.
  - 65% of the diagnosed patients are 50 years or older.
  - 45% of the diagnosed patients had at least one record of inpatient care for their diagnosis.

Demographic overview of COVID-19 diagnosed patients (N= 157,649)

- **INTERNAL MEDICINE**
  - 35%

- **FAMILY MEDICINE**
  - 20%

- **EMERGENCY MEDICINE**
  - 15%

- **INFECTION DISEASE**
  - 8%

- **PULMONARY CRITICAL CARE MEDICINE**
  - 6%

- **DIAGNOSTIC RADIOLOGY**
  - 5%

- **CARDIOVASCULAR DISEASE**
  - 5%

- **PULMONARY DISEASE**
  - 3%

- **NEPHROLOGY**
  - 2%

- **PEDIATRIC INFECTION DISEASE**
  - 0%

**PATIENT AGE**
- Mean Age: 56.3
- Median Age: 57

**PATIENT GENDER**
- Female: 52%
- Male: 48%

**TOP PLACES OF SERVICE**
- **HOSPITAL - INPATIENT**
  - 45%

- **OFFICE**
  - 17%

- **HOSPITAL - OUTPATIENT DEPARTMENT**
  - 15%

- **TELEHEALTH**
  - 13%

- **HOSPITAL - EMERGENCY ROOM**
  - 12%

- **URGENT CARE FACILITY**
  - 5%

- **HOME**
  - 3%

- **INDEPENDENT LABORATORY**
  - 3%

- **SKILLED NURSING FACILITY**
  - 2%

- **HOSPITAL - REFERENCED DIAGNOSTICS**
  - 1%

Caveats: Due to expected lag in claim submissions to payers, trends for metrics such as patient volumes by all demographic and other attributes are expected to change on a rolling 8 to 10 weeks period. PRA is using guidance provided by CDC and CMS, to classify patients as diagnosed, tested, exposed, symptomatic and exposed or tested.
Diagnosis Distributions of COVID-19 Diagnosed Patients

Caveats: Due to expected lag in claim submission to payers, trends for metrics such as patient volumes by all demographic and other attributes are expected to change on a rolling 8 to 10 weeks period.

**Chronic - Up to 1 year before Cov-19 diagnosis**

- HYPERTENSION: 44%
- HYPERLIPIDEMIA: 30%
- DIABETES MELLITUS - TYPE II: 27%
- ANEMIA: 17%
- OBESITY: 17%
- VITAMIN DEFICIENCY: 15%
- ANXIETY & DEPRESSION: 13%
- ASTHMA: 12%
- OSTEOPOROSIS: 12%
- CAD: 11%
- HYPOTHYROIDISM: 10%
- CHRONIC KIDNEY DISEASE (CKD): 10%
- PERSONAL HISTORY OF NICOTINE: 9%
- COPD: 8%

**Acute - Up to 1 month before/after first Cov-19 diagnosis date**

- OTHER VIRAL PNEUMONIA: 36%
- COUGH: 31%
- FEVER: 27%
- ACUTE RESPIRATORY FAILURE WITH HYPOXIA: 25%
- SHORTNESS OF BREATH: 24%
- PNEUMONIA, UNSPECIFIED ORGANISM: 20%
- ACUTE KIDNEY FAILURE: 14%
- HYPOXEMIA: 12%
- ACUTE UPPER RESPIRATORY INFECTION: 10%
- SEPSIS, UNSPECIFIED ORGANISM: 9%
- VIRAL INFECTION: 8%
- HYPO-Osmolality and HYponatremia: 7%
- GASTRO-ESOPHAGEAL REFLUX DISEASE: 6%
- DIARRHEA: 6%
- CHEST PAIN: 6%
- OTHER SPECIFIED SEPSIS: 6%
- DYSPNEA: 6%
- ARDS: 6%
- ACUTE LOWER RESPIRATORY INFECTION: 5%

**Acute - Same day as first Cov-19 diagnosis date**

- OTHER VIRAL PNEUMONIA: 31%
- ACUTE RESPIRATORY FAILURE WITH HYPOXIA: 18%
- COUGH: 16%
- FEVER: 14%
- SHORTNESS OF BREATH: 14%
- PNEUMONIA, UNSPECIFIED ORGANISM: 11%
- ACUTE KIDNEY FAILURE: 10%
- HYPOXEMIA: 7%
- SEPSIS, UNSPECIFIED ORGANISM: 6%
- OTHER SPECIFIED SEPSIS: 5%
- HYPO-Osmolality and HYponatremia: 5%

- Hypertension, hyperlipidemia and T2DM were the most common chronic comorbidities observed in patients diagnosed with COVID-19 infections.

- Acute infection symptoms and diagnoses captured within a month prior to or on date of first COVID-19 infection included acute respiratory failure with hypoxia, cough, fever, shortness of breath, acute kidney failure, hypoxemia, sepsis and ARDS.
Market Insights for Women’s Health

Screening Patterns
Care Delivery for New & Expectant Mothers
Pain Management
Personal Appearance
Sexual Health
COVID-19 EFFECT ON:

Women’s Health

Given the broad range of impacts to women during the COVID-19 pandemic, we conducted further research into the female patient population to evaluate shifts in care delivery patterns and therapeutic categories with prescription trends outside of normal activity.

More than 60% of the ~26 million job losses due to COVID-19 were experienced by women.

In four sectors – educational and health services, financial services, construction, and information – women lost jobs while employment for men rose.

The majority of job losses for both women and men occurred in the leisure and hospitality industries, however, 261,000 women in the field lost their job compared to 181,000 men.

Both employed & unemployed women are disproportionately feeling overwhelmed due to daily demands, from shopping for essentials amid shortages and virus fears to caring for children when schools and day cares are closed.

31% of women with full-time jobs and families say they have more to do than they can possibly handle. Only 13% of working men with families say the same.

1 in 4 women [still employed] say they are experiencing severe anxiety with physical symptoms compared to 1 in 10 men.

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COVID-19 Pandemic: Impacts to Women

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Sources:
https://www.businessinsider.com/coronavirus-unemployment-women-60-percent-2020-4
Procedure volumes for screening tests for breast cancer, cervical cancer, sexually transmitted diseases and osteoporosis have all dropped more than 50% compared to 2019 baseline metrics.

<table>
<thead>
<tr>
<th>Screening</th>
<th>Average Weekly Mar-Apr '20 vs. Average Weekly Baseline</th>
</tr>
</thead>
<tbody>
<tr>
<td>BREAST CANCER SCREENING</td>
<td>-62%</td>
</tr>
<tr>
<td>CERVICAL CANCER SCREENING</td>
<td>-67%</td>
</tr>
<tr>
<td>CHLAMYDIA SCREENING</td>
<td>-55%</td>
</tr>
<tr>
<td>OSTEOPOROSIS SCREENING</td>
<td>-65%</td>
</tr>
</tbody>
</table>
Care Delivery for New & Expectant Mothers

**Screening Procedures**

- Post-Partum visits are declining at a faster rate compared to Pre-Natal visits.
- [May 7th] Unicef called for governments to maintain lifesaving services for pregnant women and newborns that are under increasing threat from strained health services and supply chains.

**Infertility Market Trends TRx Units**

- Infertility therapies have drastically declined since mid-March with only moderate increases in prescription activity in recent weeks.

Despite speculation the COVID-19 pandemic is fueling the opioid crisis, national usage of prescriptions for pain management by female patients has declined by -22% for codeine/combos and -20% for anti-arthritis compared to the prior year.

**Note:** The mandate to temporarily suspend elective surgeries may be a contributor to the lower pain medication trends.
Elective Therapies:
Personal Appearance

States with Increases in Hair-Related Prescriptions with Week Ending 5/1/2020 Compared to the Prior Week

<table>
<thead>
<tr>
<th>STATE</th>
<th>CURRENT 4 WEEK AVERAGE</th>
<th>CURRENT VS PRIOR WEEK</th>
</tr>
</thead>
<tbody>
<tr>
<td>NH</td>
<td>53</td>
<td>45%</td>
</tr>
<tr>
<td>SC</td>
<td>266</td>
<td>18%</td>
</tr>
<tr>
<td>UT</td>
<td>68</td>
<td>17%</td>
</tr>
<tr>
<td>KS</td>
<td>178</td>
<td>13%</td>
</tr>
<tr>
<td>NC</td>
<td>643</td>
<td>12%</td>
</tr>
<tr>
<td>CA</td>
<td>1,765</td>
<td>11%</td>
</tr>
<tr>
<td>GA</td>
<td>555</td>
<td>10%</td>
</tr>
<tr>
<td>KY</td>
<td>407</td>
<td>10%</td>
</tr>
<tr>
<td>WA</td>
<td>284</td>
<td>8%</td>
</tr>
<tr>
<td>NY</td>
<td>770</td>
<td>7%</td>
</tr>
<tr>
<td>OK</td>
<td>273</td>
<td>7%</td>
</tr>
<tr>
<td>MA</td>
<td>280</td>
<td>5%</td>
</tr>
<tr>
<td>WV</td>
<td>156</td>
<td>4%</td>
</tr>
<tr>
<td>IN</td>
<td>472</td>
<td>4%</td>
</tr>
<tr>
<td>NM</td>
<td>65</td>
<td>3%</td>
</tr>
<tr>
<td>CT</td>
<td>165</td>
<td>2%</td>
</tr>
<tr>
<td>IL</td>
<td>430</td>
<td>2%</td>
</tr>
</tbody>
</table>

- Despite a 6% drop in new prescription activity for hair-related products among female patients, new prescriptions are on the rise as states move forward with relaxing or ending stay-at-home orders.


South Carolina
- Gov. Henry McMaster announced that at 5 p.m. on April 20, some retail stores will be allowed to open.
- Beaches were allowed to reopen to public access on April 21, though local governments are allowed to keep them closed.

Kansas
- The state’s stay-at-home order ended May 4.
- Gov. Laura Kelly said restaurants can open if they adhere to proper public health guidelines.
- Libraries and child care facilities also may open.

North Carolina
- Gov. Roy Cooper extended a stay-at-home order, now set to go through May 8.
Elective Therapies: Weight Management

States with Increases in Weight Management Prescriptions with Week Ending 5/1/2020 Compared to the Prior Week

<table>
<thead>
<tr>
<th>STATE</th>
<th>CURRENT WEEK AVERAGE</th>
<th>CURRENT VS PRIOR WEEK</th>
</tr>
</thead>
<tbody>
<tr>
<td>LA</td>
<td>2,838</td>
<td>11%</td>
</tr>
<tr>
<td>MA</td>
<td>2,099</td>
<td>10%</td>
</tr>
<tr>
<td>AR</td>
<td>2,303</td>
<td>9%</td>
</tr>
<tr>
<td>AL</td>
<td>3,058</td>
<td>8%</td>
</tr>
<tr>
<td>ND</td>
<td>328</td>
<td>7%</td>
</tr>
<tr>
<td>MT</td>
<td>545</td>
<td>6%</td>
</tr>
<tr>
<td>RI</td>
<td>406</td>
<td>5%</td>
</tr>
<tr>
<td>OK</td>
<td>2,644</td>
<td>5%</td>
</tr>
<tr>
<td>OR</td>
<td>1,077</td>
<td>5%</td>
</tr>
<tr>
<td>MS</td>
<td>1,321</td>
<td>4%</td>
</tr>
<tr>
<td>ID</td>
<td>965</td>
<td>3%</td>
</tr>
<tr>
<td>MO</td>
<td>3,467</td>
<td>3%</td>
</tr>
<tr>
<td>IN</td>
<td>3,231</td>
<td>3%</td>
</tr>
<tr>
<td>NV</td>
<td>1,208</td>
<td>2%</td>
</tr>
<tr>
<td>CT</td>
<td>1,226</td>
<td>2%</td>
</tr>
<tr>
<td>KS</td>
<td>2,009</td>
<td>2%</td>
</tr>
<tr>
<td>CO</td>
<td>1,499</td>
<td>2%</td>
</tr>
<tr>
<td>GA</td>
<td>6,432</td>
<td>2%</td>
</tr>
<tr>
<td>NY</td>
<td>4,813</td>
<td>2%</td>
</tr>
<tr>
<td>FL</td>
<td>9,042</td>
<td>2%</td>
</tr>
</tbody>
</table>

Louisiana
- Gov. John Bel Edwards issued new guidelines for the state and eased some restrictions while extending the stay at home order until May 15.

Massachusetts
- Gov. Charlie Baker announced that he is extending the timeline for the closure of nonessential businesses until May 18th.
- Massachusetts has joined a coalition with the Northeastern states of New York, New Jersey, Connecticut, Pennsylvania, Delaware, and Rhode Island to coordinate the reopening of the economy, according to a press release from New York Gov. Andrew Cuomo’s office.

Arkansas
- Gov. Asa Hutchinson said April 30th that gyms, fitness centers, and indoor athletic facilities can resume operations beginning May 4.
- Barbershops and hair salons can open Wednesday, May 6.

- New prescriptions for weight management continue to increase among female patients as of week ending 5/1/2020.

Elective Therapies: Sexual Health

- The decline seen with vaginal anti-infectives is primarily driven by Metronidazole, which declined by 24% compared to earlier in the year (current 4 week average is 22.8K).
- Sexual function disorder prescriptions for women is driven by Sildenafil Citrate (generic Viagra, usually prescribed off-label for women with a low sex drive).
- Although total market volume for females is down by 16% compared to earlier in the year, a 10% uptick in activity is visible with week ending 5/1/2020.

States with Increases in Prescriptions for Sexual Health with Week Ending 5/1/2020 Compared to the Prior Week

<table>
<thead>
<tr>
<th>State</th>
<th>Current 4 Week Average</th>
<th>Current vs Prior Week</th>
</tr>
</thead>
<tbody>
<tr>
<td>VT</td>
<td>67</td>
<td>36%</td>
</tr>
<tr>
<td>MT</td>
<td>78</td>
<td>32%</td>
</tr>
<tr>
<td>MS</td>
<td>386</td>
<td>13%</td>
</tr>
<tr>
<td>AK</td>
<td>71</td>
<td>10%</td>
</tr>
<tr>
<td>NE</td>
<td>205</td>
<td>9%</td>
</tr>
<tr>
<td>ME</td>
<td>172</td>
<td>8%</td>
</tr>
<tr>
<td>DE</td>
<td>175</td>
<td>8%</td>
</tr>
<tr>
<td>NM</td>
<td>231</td>
<td>8%</td>
</tr>
<tr>
<td>IN</td>
<td>840</td>
<td>6%</td>
</tr>
<tr>
<td>FL</td>
<td>4,453</td>
<td>5%</td>
</tr>
<tr>
<td>AL</td>
<td>761</td>
<td>5%</td>
</tr>
<tr>
<td>RI</td>
<td>210</td>
<td>4%</td>
</tr>
<tr>
<td>IL</td>
<td>2,096</td>
<td>4%</td>
</tr>
<tr>
<td>NV</td>
<td>491</td>
<td>4%</td>
</tr>
<tr>
<td>GA</td>
<td>2,047</td>
<td>3%</td>
</tr>
<tr>
<td>VA</td>
<td>1,444</td>
<td>3%</td>
</tr>
<tr>
<td>NC</td>
<td>1,702</td>
<td>3%</td>
</tr>
<tr>
<td>TX</td>
<td>4,070</td>
<td>3%</td>
</tr>
<tr>
<td>KS</td>
<td>318</td>
<td>3%</td>
</tr>
<tr>
<td>SC</td>
<td>826</td>
<td>2%</td>
</tr>
</tbody>
</table>

Vermont
- Gov. Phil Scott issued a “Stay Home, Stay Safe” order that has been extended until May 15.
- Scott said the state will be able to get thousands of its residents back to work May 4.

Mississippi
- Mississippi’s statewide stay-at-home order is scheduled to end on May 11.

Alaska
- Gov. Mike Dunleavy allowed personal services businesses and restaurants in most parts of Alaska to reopen April 24, but with restrictions.

Elective Therapies: Sexual Health

Weekly Contraceptive Trend

- In week 12 of 2020, prescriptions increased 8.26% from the previous week (over 7% from the previous year).
- Following week 12, the contraceptive market has seen an average weekly decline of 7.35% compared to 2019.

Weekly Age Group Trend

- Contraceptive prescriptions in females across all ages have experienced 6 straight weeks of decline compared to 2019 levels.
- Females ages 18 to 39 have seen the largest decrease in prescription activity with nearly a 9% drop as of week ending 5/1/2020 compared to 2019.
General Health Checks:
Telemedicine Trends
Overall Market Volume
Elective Therapies
Channel Distribution Trends
Cardiology continues to be the specialty most rapidly adopting the use of Telemedicine since stay at home orders were issued across the United States.

Index = Current Week vs. 12 Week Rolling Average (from the same time period in 2019)

Source: https://www.fiercehealthcare.com

Note: The revised Index values reported for week ending 5/1 trend to the prior week Index. The current trends should be used for review and comparison purposes.

• [May 6th] CVS CEO Larry Merlo said that utilization of telehealth and virtual visits through its MinuteClinic locations was up 600% compared to the first quarter of 2019, while home delivery of prescriptions was up 1000%.
• Additionally, there is a fourfold increase in the number of customers adding other items from the front of their stores to home pharmacy deliveries.

Telemedicine Visits by Specialty
Week over week Telemedicine visit trends have remained consistent with significant use for the management of diseases in the circulatory system and Neoplasms (Oncology).

Index = Current Week vs. 12 Week Rolling Average (from the same time period in 2019)

Note: The revised Index values reported for week ending 5/1 trend to the prior week Index. The current trends should be used for review and comparison purposes.
Office Visit volume is slowly starting to ramp up across all disease areas

While the majority of disease categories saw a decline in Office Visit volume since the onset of the COVID-19 pandemic, office visits for Respiratory Diseases, Mental Health, and Pregnancy remained consistent with pre-COVID levels.
Overall New and Total prescription counts continue to decline below normal reporting thresholds with week ending 5/1/2020.
COVID-19 INSIGHTS

Decrease in Other Elective Therapies Continue

- For the 6th straight week, “Elective Therapies” have dropped compared to the same week in 2019.

- Products within the Ophthalmic Preparations USC class continue to garner the largest shift in prescription activity, with a decrease of nearly 30% as of week ending 5/1/2020.
Markets of Interest: USC 2: ALL

Data Ending: May 1st, 2020

**Week 18 = 5/1/2020**

**Week 1 = 1/3/2020**

Mail Order prescription activity declined further with week ending 5/1/2020 while Retail prescriptions showed minimal change from the prior week.

- Retail activity is up .02% with week ending 5/1/2020, although still significantly below 2019 thresholds.

Mail Order prescriptions declined by over 106,000 with week ending 5/1/2020, approximately -3% from the prior week.