COVID-19 Weekly Trend Insights

Data Week Ending 6/19/2020
Compiled on 7/9/2020
Executive Summary

COVID-19 in the News & Latest Trends

- Since our last insight report was published, global cases have increased by 44%
- Through patient activity observed for diagnosis, testing, exposure or symptoms of COVID-19 infection, PRA/SHS is tracking about 3.6M patients, with just over 683k diagnosed during the time period Feb 4, 2020 to Jun 30, 2020
- Demographics are starting to shift in the COVID-19 Diagnosed patient population. At the start of the pandemic, a higher proportion of diagnosed Covid-19 patients were older and male. There has been a steady decline in age, with the lowest median age of 44 in the week ending June 27
- With the recent news that Dexamethasone lowers the risk of death in COVID-19 patients on ventilators or oxygen by 35% and 20% respectively. Care Guidelines are now incorporating guidance for use of this drug, as such, we observed in Data week ending 6/19/2020 an increase of 314% in volume within the Non Retail channel

Deep Dive: Impact on New Product Launches

- Due to COVID and other confounding factors, many top drug categories with recently launched medications were significantly impacted but to varying degrees:
  - Despite some volatility in recent Migraine launches during height of COVID pandemic, these brands continued to be adopted rapidly compared to other markets
  - The pandemic appears to have slowed the adoption curve of new contraceptives and diabetes therapy however they are once again reaching pre-COVID rates
  - New dermatologica appear to have been negatively impacted the most both during COVID peak and experienced difficulty recovering
  - Psychotherapeutics uptake plateaued during COVID peak and post initial COVID wave
  - Despite the pandemic, new vascular agent brands continued to grow
  - Slides 4-19 take a closer look into the newly launch brands with the highest volume to analyze the COVID-19 impact

Health Checks

- Telemedicine usage stabilized at an average of ~28K patients per week during June 2020, more than 10K patients less than the peak usage achieved during week ending 4/24/2020
- MARKET MONITORING: Key Markets assessed: Cardiology, Antivirals, Respiratory Therapy, Immunology, Oncology
  - ANTI-VIRALS new prescription activity is still -3% below prior year thresholds with week ending 6/19/2020. Respiratory Therapies are also continuing to report significantly below prior year thresholds
  - Cardiology, Oncology, and Immunology are all now recovered and reporting within normal or above normal thresholds
- Elective therapy markets continue to observe slower recovery patterns; Ophthalmic preparations and hormone therapies continue to experience the longest recovery rates compared to other elective therapies
- Overall prescription activity at a national level has almost recovered to normal reporting thresholds compared to the prior year; New prescription activity is still lagging by -2% as of week ending 6/19/2020
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COVID-19: Current Events

COVID-19 Patient Monitoring

COVID-19: Update on Potential Treatments
As the U.S. begins to open back up, coronavirus clusters—where multiple people contract COVID-19 at the same event or location—are popping up all over the country. Social events and gatherings, where people do not wear masks, is the primary source of the spread of coronavirus.

June 28th
Confirmed worldwide cases of the coronavirus broke the 10 million mark today according to a database kept by Johns Hopkins University. Nearly 500,000 people have died after contracting the virus, according to Johns Hopkins.

June 29th
The Department of Health and Human Services has secured more than 500,000 courses of Remdesivir, an antiviral treatment for COVID-19, that it will distribute to hospitals for purchase. The amount secured represents 100% of drugmaker Gilead’s projected production for July (94,200 courses), 90% of production projected for August and 90% of production projected for September.

June 30th
Humana will now offer LabCorp’s home COVID-19 tests to its members and is teaming up with Walmart and Quest Diagnostics to provide access to drive-thru tests. LabCorp will offer a home test, and at the Walmart drive-thrus, pharmacists will provide patients with a nasal swab and then observe them as they collect the sample.

June 24th
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Sources:
Global cases continue to rise as COVID-19 cases surge in the United States & Latin American countries. Brazil & Mexico have yet to "flatten the curve" for confirmed cases. While the US has seen a spike in cases as social distancing guidelines & testing increases.

Since our last COVID-19 insight report on June 19th, global cases have increased by approximately 3.75 million or 44%.

Global recovered cases reached over 5.5 million, increasing by nearly 71% or roughly 24% increase weekly since last report.

Confirmed Cases Worldwide

**Confirmed Cases**

12,220,963

**Deaths**

553,477

**Recovered**

5,531,978

Source: https://www.theguardian.com/world/2020/may/07/coronavirus-world-map-which-countries-have-the-most-cases-and-deaths
CONFIRMED CASES IN THE USA

- As state re-openings continue, confirmed cases of COVID-19 increased by over 927,434 from June 19th to July 10th, representing an increase of roughly 42% or 14% per week.

- Since the last Insights Report, Florida and Texas both observed an increase of over 100% in confirmed cases (the most among any top 10 state). Florida has seen an average increase of 57% per week from the last report.

- Arizona & Georgia have entered the top 10, replacing Michigan & Maryland. These two new states have over 100,000 confirmed cases.

Confirmed Cases: 3,117,532
Deaths: 133,275

State/Territory  Tests  Test % Change  Confirmed Cases  Case % Change  Deaths  Death % Change
New York  4,468,016  41%  399,513  4%  24,959  1%
California  5,078,434  65%  296,499  84%  6,711  27%
Florida  2,359,294  56%  232,718  171%  4,111  30%
Texas  2,313,212  64%  230,346  131%  2,918  39%
New Jersey  1,599,417  37%  174,240  4%  15,448  21%
Illinois  1,879,878  46%  151,572  12%  7,329  9%
Arizona  #N/A  #N/A  112,671  #N/A  2,038  #N/A
Massachusetts  925,761  25%  110,897  4%  8,268  6%
Georgia  1,019,422  #N/A  106,727  #N/A  2,930  #N/A
Pennsylvania  880,023  41%  92,867  16%  6,848  8%

Through patient activity observed for diagnosis, testing, and exposure or symptoms of Covid-19 infection, PRA is tracking about 5.5M patients during the time period Feb 4, 2020 to Jun 30, 2020. Patients could be reported in multiple status categories based on claims captured and mapped to status.

**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.
COVID-19 Infection Trends - Changing demographics

At the start of the pandemic, a higher proportion of diagnosed Covid-19 patients were older and male. There has been a steady decline in age, with the lowest median age of 44 in the week ending June 27.

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.

COVID-19 Diagnosed Patient Age by Week

Increase in percent of patients under the age of 60

Covid-19 Diagnosed Patient Gender Distribution by Week

Decrease in Medicare, reflective of the shift in age

Covid-19 Diagnosed Patient Mean and Median Age by Week

Mean patient age declined from 55 to 45 years old

PRA US patient longitudinally linked medical and hospital claims data, raw patient volumes
COVID-19 Infection Trends- Changing Location of Care

At the start of the pandemic, majority of patients received a diagnosis at an inpatient hospital setting. Recently, Covid-19 patients have received diagnosis across multiple places of service- notably telehealth, physician offices, and outpatient hospital departments.

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.
POTENTIAL COVID-19 CANDIDATES: DEXAMETHASONE

- Researchers funded by the U.K. government said Dexamethasone lowered the risk of death in COVID-19 patients on ventilators or oxygen by 35% and 20% respectively.
- In England, the top-line results were enough to convince the National Health Service (NHS) to approve Dexamethasone for use in all COVID-19 patients requiring ventilation.
- The World Health Organization vowed to update its clinical guidance on treating the coronavirus to incorporate the new data on the steroid.
- According to the NIH, “The COVID-19 Treatment Guidelines Panel (the Panel) recommends using dexamethasone (at a dose of 6 mg per day for up to 10 days) in patients with COVID-19 who are mechanically ventilated (AI) and in patients with COVID-19 who require supplemental oxygen but who are not mechanically ventilated (BI).”

- As of week ending 7/3/2020, Dexamethasone products continue to trend above normal volume of 1.7 million integrated units in the Non Retail channel.
- Data week ending 6/19/2020 garnered an increase of 314% in volume within the Non Retail channel from the previous week, with a 3 week average of over 5.1 million integrated Units.
- With the Hospitals & Clinics, the sub-class of trade “Hospital, Others” has a 3 week average of over 2.97 million NR Volume units, which is 355% increase from the 3 week average before the study results (5/29/2020-6/12/2020).

Source: https://www.covid19treatmentguidelines.nih.gov/dexamethasone/

Source: Merck
Time Period: Weekly YTD. Data ending 7/3/2020

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Drug Launch Pulse

Monitoring how COVID-19 may have affected newly launched products

Class-level Launch Comparison

Brand-level Launch Assessment*

Note: Top brands highlighted in Launch Assessment were selected based on Rx volume that launched within the last 52 weeks.
Due to COVID and other confounding factors, many top drug categories with recently launched medications were significantly impacted but to varying degrees.

### Key Observations

- Despite some volatility in recent Migraine launches during height of COVID pandemic, these brands continued to be adopted rapidly compared to other markets.
- The pandemic appears to have slowed the adoption curve of new contraceptives and diabetes therapy however they are once again reaching pre-COVID rates in recent weeks.
- New dermatologicals appear to have been negatively impacted the most both during COVID peak and experienced difficulty recovering.
- Psychotherapeutics uptake plateaued during COVID peak and post initial COVID wave.
- Despite the pandemic, new vascular agent brands continued to grow.

Note: only includes the top classes by NRx volume with recent product launches.
Despite launching with a digital salesforce and telmed network, Nurtec’s initial uptake was stymied compared to direct-competitor Ubrelvy.

Nurtec was intentionally launched during COVID with a digital salesforce and in collaboration with Cove telmed network, and a $0 copay program at launch.

Ubrelvy took an initial hit just prior to the launch of Nurtec, with share falling even more during pandemic.

Weeks Post-Launch | Ratio of Adopters to Triers
--- | ---
12 | 19%
24 | 24%
48 | --

Weeks Post-Launch | Ratio of Adopters to Triers
--- | ---
12 | 20%
24 | 27%
48 | --
Recent contraceptive brand launches appear not to have been significantly impacted by COVID stay at home orders, likely due to ability to be prescribed products through telehealth services.

Eluryng appears to have performed better during COVID peak compared to forecast, likely because it brings a more affordable option to branded competitor, Nuvaring.

Considering high saturation of other hormonal contraceptive pills on the market, Slynd’s number of adopters nearly a year after launch is high.

Note: NRx forecast trends developed using product launch date through week ending 3/13/2020 with upper and lower bounds set at 95% confidence interval

Note: Ratio of Adopter to Trier is # Adopters / # Triers; Trier is physician with ≥1 NRx; Adopter is physician with ≥4 NRx

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<thead>
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<td>24</td>
<td>12%</td>
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<td>48</td>
<td>16%</td>
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<td>48</td>
<td>37%</td>
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During the COVID-19 peak, Rybelsus NRx upward trend declined as physicians may have been very careful in their selection of new therapies for patients during the COVID-19 outbreak.

Given the importance of the link between COVID and diabetes, diabetes management and access to pharmaceutical intervention, such as GLP 1s like Rybelsus, are recommended for management of metabolic and glycaemic control.

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Source: https://www.thelancet.com/journals/landia/article/PIIS2213-8587(20)30152-2/fulltext#box1
Acne medications were hit hard during the pandemic as many dermatology offices closed their doors altogether and patients likely weighed the benefits of treating acne versus leaving the house for doctors' appointments.

Despite lower volume during COVID peak, the physicians who initially tried AMZEEQ and AKLIEF continued to adopt these products.

**Note:** NRx forecast trends developed using product launch date through week ending 3/13/2020 with upper and lower bounds set at 95% confidence interval. Note: Ratio of Adopter to Triers = # Adopters / # Trier; Trier is physician with ≥1 NRx; Adopter is physician with ≥4 NRx.
Top recently launched psychotherapeutic brands face downward trajectories during the COVID-19 pandemic, likely impacted by reduction in access to care and controlled substance status.

Although federal agencies reduced barriers to controlled substances and tried to increase access to care, controlled brands Adhansia and Sunosi faced declines in new scripts during COVID peak with declines continuing post-COVID peak.

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NUBEQA uptake appears to have been impacted considerably during COVID-19 peak while XPOVIO experienced only 1-2 weeks of decline from normal trajectory since launch.

Prostate cancer experienced a significant decline in office visits during COVID peak compared to Multiple Myeloma which may account for impact to NUBEQA uptake in March and April.

**Table: Ratio of Adopters to Triers**

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<td>48</td>
<td>11%</td>
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General Market Pulse

Telemedicine & Care Delivery Trends
High Value Market + Select Elective Therapy Monitoring
National / Channel / Pay Type Summaries
Telemedicine usage stabilized at an average of ~28K patients per week during June 2020, more than 10K patients less than the peak usage achieved during week ending 4/24/2020 (~39K patients).

- Office visits continue to recover with week ending 6/19/2020, but are still ~9% below pre-COVID levels.
### Telemedicine Visits: Diagnosis

- While telemedicine visits remain above 2019 levels, they have started to level off or decline from the COVID-19 peak for most diagnoses.
- Notable exceptions are the disease of the blood and endocrine, nutritional, and metabolic disease, which continues to increase.
- Telemedicine use for patients with diseases of the circulatory system has declined 50% from the high in the week of May 1.

#### Telemedicine Visits by Diagnosis

<table>
<thead>
<tr>
<th>Diagnosis</th>
<th>Index</th>
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</thead>
<tbody>
<tr>
<td>CERTAIN INFECTIOUS AND PARASITIC DISEASES</td>
<td>11.0</td>
</tr>
<tr>
<td>DISEASES OF THE BLOOD AND BLOOD-FORMING ORGANS AND CERTAIN DISORDERS INVOLVING THE IMMUNE MECHANISM</td>
<td>1.7</td>
</tr>
<tr>
<td>DISEASES OF THE CIRCULATORY SYSTEM</td>
<td>2.7</td>
</tr>
<tr>
<td>DISEASES OF THE DIGESTIVE SYSTEM</td>
<td>6.2</td>
</tr>
<tr>
<td>DISEASES OF THE GENITOURINARY SYSTEM</td>
<td>10.2</td>
</tr>
<tr>
<td>DISEASES OF THE NERVOUS SYSTEM</td>
<td>3.9</td>
</tr>
<tr>
<td>DISEASES OF THE RESPIRATORY SYSTEM</td>
<td>10.4</td>
</tr>
<tr>
<td>ENDOCRINE, NUTRITIONAL AND METABOLIC DISEASES</td>
<td>1.7</td>
</tr>
<tr>
<td>MENTAL AND BEHAVIORAL DISORDERS</td>
<td>1.1</td>
</tr>
<tr>
<td>NEOPLASMS</td>
<td>0.9</td>
</tr>
<tr>
<td>PREGNANCY, CHILDBIRTH AND THE PUERPERIUM</td>
<td>2.7</td>
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*Index = Current Week vs. 12 Week Rolling Average (from the same time period in 2019)*
Office Visits: Diagnosis

- Office visits have been gradually increasing from their lowest point during the week of March 27.
- The one notable exception is diseases of the respiratory system which bottomed out during the week of April 17 and has improved only slightly since then.

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Index = Current Week vs. 12 Week Rolling Average (from the same time period in 2019)
Telemedicine use by provider specialty has leveled off or declined slightly since the peak in mid-April.

Among cardiologists, the use of telemedicine peaked at 221 times 2019 level, but has since declined to 89 times 2019 levels.

Use of telemedicine by nurse practitioner is the second highest at 64 times 2019 levels as of the week of July 2.
Office Visits: Specialty

- Office visits continue to increase from their low point in the week of March 27 for all specialties.
- As of the week ending July 3rd, all specialty except pediatricians were 6-15% above 2019 levels.
- Pediatrics remains down by -25% compared to 2019 levels.

Index = Current Week vs. 12 Week Rolling Average (from the same time period in 2019)
Office Visits: Payment Type

- Use of telemedicine for Medicaid patients initially increased by a factor of 25 but has dropped down to 14 times 2019 levels as of week ending July 3rd.

- Telemedicine use by Commercial and Cash patients initially increases dramatically, but has since declined substantially.

- Use of telemedicine by Medicare patients increased 13-fold but has declined somewhat in recent weeks.

- Office visits for Cash patients were down over 60% from 2019 level and has slowly increased since then, reaching 44% as of the week ending July 3rd. This may be due, at least in part, to increased unemployment.

- Office visit for all other payment types have recovered to near pre-COVID levels from the low point in the week of March 27, with Medicare showing the greatest recovery.

Index = Current Week vs. 12 Week Rolling Average (from the same time period in 2019)
ANTI-VIRALS: New prescription activity is still -3% below prior year thresholds with week ending 6/19/2020. Overall new and total anti-viral activity has shown steady recovery since its lowest point during week ending 4/3/2020.
CARDIOLOGY: The cardiology market has officially recovered and exceeded prior year thresholds with week ending 6/12/2020, 12 weeks after the peak COVID-19 response to the March 14th “state of emergency” declaration.
IMMUNOLOGY: Unlike other key markets, total immunology prescriptions never dropped below prior year thresholds. New prescription activity, on the other hand, bottomed out week ending 5/1/2020 at -7% and only just exceeded prior year volumes with 6/19/2020.

IMMUNOLOGY Current vs. Prior Year (TRx)

NRx/TRx % CHANGE COMPARED TO PRIOR YEAR

Data Week 25: June 19th, 2020
Oncology prescription activity continues to climb as of mid-June.

**ONCOLOGY**: Total oncology prescriptions matched prior year thresholds with week ending 6/5/2020, following a 9-week downturn.

**ONCOLOGY Current vs. Prior Year (TRx)**

- **NRx % CHANGE COMPARED TO PRIOR YEAR**

- **Current vs. Prior Year (%) Change**

- **Current vs. Prior Year % Change**

- **Data Week 25: June 19th, 2020**

- **Oncology prescription activity continues to climb as of mid-June.**
RESPIRATORY THERAPY: New respiratory therapy prescriptions continue to trend significantly below prior year thresholds, most likely the result of early stockpiling, a higher average days supply, or supply shortages.

RESPIRATORY THERAPY Current vs. Prior Year (TRx)

Data Week 25: June 19th, 2020
Average days supply for most key markets continue to maintain thresholds achieved in early April, with only cardiology and respiratory therapies having any kind of recent uptick.
Elective Therapies Continue to Report Below Prior Year Thresholds

- Elective therapy markets continue to observe slower recovery patterns.

- The rise of new COVID-19 hot spots may further delay recovery to normal prescription thresholds as patients favor maintenance therapies.

- Ophthalmic preparations and hormone therapies continue to experience the longest recovery rates compared to other elective therapies.
NATIONAL TRENDS: Overall prescription activity at a national level has almost recovered to normal reporting thresholds compared to the prior year. New prescription activity is still lagging by -2% as of week ending 6/19/2020.
NATIONAL TRENDS: Patients have a greater reliance on Assistance Programs to obtain their medications in 2020 (compared to 2019). The corresponding drop in out-of-pocket prescription costs is still significantly down by -14%, reflecting the continued growth in U.S. unemployment rates.

- PAID = Approved prescriptions taken home by the patient
- REJECTED = Prescription claims rejected by the payer
- ABANDONED = Prescription claims not taken home by the patient

**Pay Type Changes for Paid (Approved), Rejected, & Abandoned Claims**

*Current YTD vs. Prior Year YTD (All Claims)*
NATIONAL TRENDS: Retail TRx has almost recovered to prior year thresholds with week ending 6/19/2020. Mail Order is officially back on track as of 6/5/2020.