



Organized Providers

Integrated Delivery Networks–COVID-19 Update: Lasting Impacts and Manufacturer Support

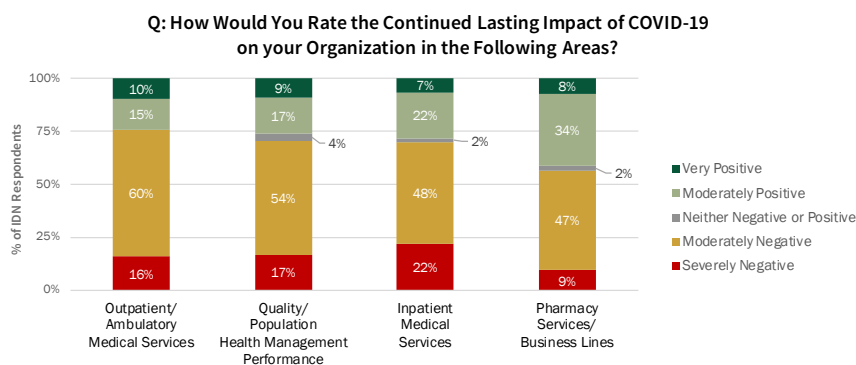
The COVID-19 pandemic continues to affect the businesses of key customer segments, as well as how we engage with and support key decision-makers. HIRC's report, *Integrated Delivery Networks–COVID-19 Update: Lasting Impacts and Manufacturer Support*, reviews health care delivery trends and changing patient volumes throughout COVID-19, continued clinical and economic impacts on IDN customers, and manufacturer virtual engagement. The report addresses the following questions:

- How has the COVID-19 pandemic impacted health care delivery and patient volumes? What is the future outlook telemedicine usage after the pandemic resolves?
- What impact has the pandemic had on IDN customers' outpatient services, quality/population health objectives, inpatient medical services, and pharmacy businesses?
- What do IDNs cite as the lasting clinical and economic impacts on their organizations?
- Which manufacturers are recognized as providing the best virtual support throughout the pandemic, and why?
- How can manufacturers best continue to support IDN customers throughout the COVID-19 pandemic?

Key Finding: The lasting clinical impacts of the pandemic on IDNs include a higher number of sicker patients in the long-run, a strong surge in telemedicine, and a temporary shift in focus away from value-based care initiatives.

IDNs' Outpatient Services and Quality/Population Health Performance Among Areas Most Negatively Impacted

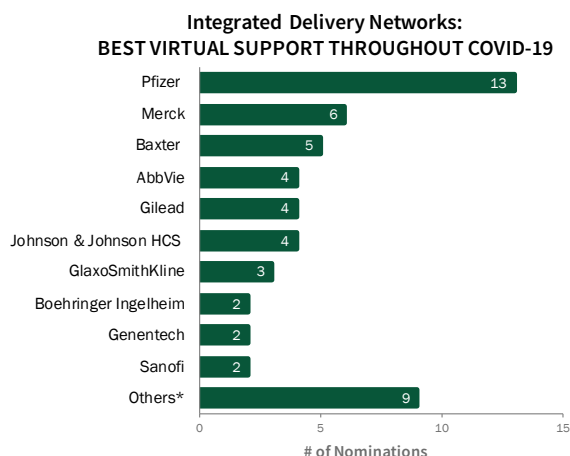
Integrated delivery networks were asked to rate the overall continued lasting impact of the COVID-19 pandemic on various parts of their businesses and operations. Ratings indicate that the pandemic had an overwhelmingly negative effect, particularly on outpatient/inpatient services and quality/population health management objectives.



Due to challenges in accessing in-person during the pandemic, telehealth usage increased substantially. Whether insurers continue to reimburse permanently will be a key driver or barrier to telemedicine continuing at an increased rate beyond the pandemic.

Pfizer is the Clear Leader in Virtual Support of IDNs During the Pandemic

Pfizer is nominated most often by IDNs as providing the best virtual support throughout the duration of the pandemic, followed by Merck and Baxter. The primary factors driving best virtual support nominations are responsive & flexible availability and providing timely and relevant information.



IDN customers largely predict that a hybrid of virtual and in-person engagements will be the “new normal” after the pandemic resolves.

The complete report also reviews the types of meetings between manufacturers and IDN customers being conducted virtually during this time, account access by role type (e.g., account manager, MSL), and recommendations for how to best access and support key accounts through COVID-19.

Research Methodology and Report Availability

In August, HIRC surveyed 62 pharmacy directors, medical directors, and quality/population health personnel from IDNs ranging in size and geographic location. A combination of secondary research, quantitative surveys, and follow-up interviews were used to gather information. The full report, *Integrated Delivery Networks–COVID-19 Update: Lasting Impacts and Manufacturer Support* is part of the Organized Providers Service, and is now available to subscribers at www.hirc.com.

The **Organized Providers Service** examines the environmental trends impacting health care delivery, focusing on how increased provider accountability and value-based reimbursement will impact pharmaceutical market access. HIRC's research with integrated delivery networks (IDNs) provides market insights and metrics to assist pharmaceutical firms in developing access strategies and quality value-added programs. For subscription information please contact:



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HEALTH INDUSTRIES RESEARCH CENTER (HIRC) is an independent, nonpartisan organization that conducts strategic market research on trends in health care, pharmaceuticals and managed care businesses. HIRC's benchmark studies focus on the marketing needs of pharmaceutical companies by providing research critical to the development of successful customer-focused marketing strategies.

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