



On **Doctors'** Minds<sup>SM</sup>

IN PARTNERSHIP WITH OLSON RESEARCH GROUP

# Executive Summary

September 2021



Olson Research Group  
Healthcare Marketing Research





# Introduction

Since November of 2020, ThinkGen, in conjunction with Olson Research, has been conducting rounds of “conversations” with physicians every month to determine the impact of the COVID-19 pandemic on doctors in office-based practices.

In September of 2021, we once again ventured into the field for one last round of conversations to ascertain the impact of the COVID-19 pandemic as the year draws to a close.

For this last round, we took a special focus on market forces such as the surge of the Delta variant, FDA approval of the Pfizer vaccine, and boosters. We also explored the kinds of vaccine “disinformation” with which physicians are having to deal, and what they are doing about them.



## Background

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To re-cap, the early rounds of the On Doctors' Minds<sup>SM</sup> project consisted of 10 conversations each month, equally distributed across cardiology, neurology, oncology, primary care and rheumatology. The sample distribution was held constant to permit us to see changes over time during these initial months. Later rounds of research focused variously on general practitioners, surgeons, and laboratory supervisors.

A separate round of research with veterinarians was also conducted for clients with an interest in that specialty. [This link](#) provides access to the Executive Summaries of all of these rounds of research, as well as to the original video recordings on which the findings were based.

A review of these documents clearly indicates that the findings across months were extremely consistent, with little need for replication. In summary, the early months of the pandemic saw:

- Most practices shut down to personal patient visits, with most physicians who had little or no prior experience and reporting a slight reluctance fleeing to telemedicine to provide continuity of patient care and to maintain practice financial viability.
- Pharmaceutical sales representatives (PSR's) disappearing from physicians' offices, both because they were "pulled" from the field by their companies and because doctors did not want extraneous personnel in the clinical setting due to infection concerns.
- Physicians dabbling with "virtual detailing" to fill the void, and to ensure the ongoing availability of samples based on contact with PSR's. Most found the scheduling of such sessions to be cumbersome.
- Elective procedures being largely postponed, with the impact of this varying by specialty. Oncologists, for example, reported "stage shifting," i.e., having initial diagnosis of cancers occurring at later stages due to postponement of screening procedures.
- Physicians also reporting somewhat of a reticence to try new products, shifting where possible to less frequent dosage regimens, and to less aggressive titration.



- Summer months of 2020 saw offices slowly reopening, and personal visits by patients slowly returning.
- Physicians responded to this reopening by moving away from telemedicine, which most found inadequate in delivering patient care due to the inability to directly examine patients.
- PSRs also slowly returned to physicians' offices for personal visits, allowing physicians to move away from virtual detailing which, as previously noted, most physicians found to be inconvenient and ungratifying.

At the bottom line, the consistency of these findings caused ThinkGen/Olson to consider “pulling the plug” on subsequent rounds of the On Doctors' Minds<sup>SM</sup> conversations.

However, as mentioned above, in September of 2021, we conducted one last round of conversations to ascertain the impact of the COVID-19 pandemic as the year draws to a close, with a special focus on market forces.

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## Highlights

With the focus of the 10 physician conversations in September (2 cardiologists, 2 neurologists, 2 oncologists, 2 primary care, 2 rheumatologists) being an update of events of the last 3-6 months, rather than a recounting of the entire pandemic experience, the major findings of this latest round of research included:

- The physicians with whom we spoke this month have “settled in” to what is happening in September of 2021 in terms of the pandemic. The confusion, lock downs, patient short falls and other traumatic phenomena that we encountered in our early months of conversations have now largely gone by the wayside, and doctors have settled into the “new normal.” The “surge” of Delta variant cases that we see being discussed on TV every night are not causing the kinds of reactions that we saw in the early months of the coronavirus outbreak, or any reactions at all for that matter. The only reaction of some note, in fact, is that the physicians with whom we spoke are becoming more than a little impatient with the unvaccinated. We will comment more on that point, below.
- While for some physicians “settling in” means that they have accepted the fact that COVID-19 will be with us “forever,” requiring annual booster shots, others emphasize the notion that increases in vaccinations and infections will eventually get us to herd immunity.
- In any event, practice protocols have largely returned to normal. Most doctors are seeing 90% or more of the patient flow that they were seeing pre-pandemic, with only patients too reticent to return to the office still being among the missing. Patient and staff masking are about all that is left of the “preventive measures” taken in offices during the pandemic.
- Relatedly, although virtually all physicians had adopted some form of telemedicine in the early days of the pandemic, very few doctors are relying on virtual visits in September of 2021, and then only for a handful of patients. For most physicians, the inability to actually “touch” and view the patient amounts to inferior medicine, making their job impossible to perform well. Telemedicine visits are thus being used only for the occasional follow-up visit for patients too distant, too infirm or too concerned about the pandemic to make it into the office. As an important aside here, one physician pointed out that insurance compensation for telemedicine has been sharply curtailed. In fact, his office was just subjected to a \$9,000 claw back of telemedicine fees which they had been purportedly “overpaid.”
- Most doctors report that the majority of their patients are fully vaccinated, with numbers hovering around 80% being typical.



- When asked to account for the reticence of the balance of the patients to get vaccinated, doctors typically offered up a variety of disinformation, including the “rush” with which the vaccines were developed, the possibility of the shots negatively impacting fertility or other parts of a patient’s genetic makeup, the perception that they are young and therefore immune, etc.
- As a result, most physicians report that they have largely given up trying to convince the remainder of their patients to get vaccinated, finding that the information that they have at their disposal doesn’t deal with generalized reluctance, thus making continued persuasion attempts a waste of the doctor’s time and potentially destructive to the doctor-patient relationship.
- In terms of the impact of “market forces,” full FDA approval of the Pfizer vaccine has had no discernible effect on patient willingness to get vaccinated. As various discussants sagely explained, virtually no patient understands the difference between emergency clearance and full approval, and “too fast is too fast” as viewed by these patients.
- Similarly, the recent increase in COVID infections due to the Delta variant is not causing an influx of vaccine-accepting patients in most doctors’ offices, although some did opine that it has caused a small uptick.
- Virtually the only event that can move vaccine resistant patients to get their shots is the potential impact of a vaccine mandate. However, many of the doctors with whom we spoke reported that the majority of their patients are retired or otherwise not involved in the populations that the mandate will cover.
- Seeing a close friend or relative die of COVID, while moving some to get vaccinated, is not a widespread enough force to make significant differences in vaccination rates in the practices that we visited.

- In terms of their relationships with pharmaceutical companies and their representatives, most doctors reported virtually a total return to pre-pandemic conditions. Representatives are being welcomed back into all of their offices for visits ranging from a “couple of minutes” for chit chat and sample signing, to full-staff lunches. In the latter regard, many physicians told us that their offices are back to having staff lunch provided by a PSR every day of the week. The one change of note here is that while most of the doctors used to eat with the PSR who provided lunch, they now are more prone to grab some food and go to their private offices to eat alone.
- Some doctors noted that the number and frequency of representative visits was down noticeably from pre-pandemic levels, with the widespread belief being that “Drug companies are just trying to save money.” This perceived dip was not thought of as being problematic, since several of the doctors considered pre-pandemic visits to be excessive in number.

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- Mirroring the results of conversations in earlier months, most of the September physicians reported that they had little tolerance for “virtual detailing.” Thus, their participation in such sessions was now either rare or totally non-existent. Their perception is that for most products, genuinely new news is extremely rare, and “reminder details” being delivered via Zoom were described, given their absence of a social overlay, as being “pure torture.”
- Conversely, many of the physicians with who we spoke were beginning to see the return of speaker-driven dinner meetings, and were beginning to participate in them. Virtual discussions involving multiple doctors and respected speakers are also being well received by our September physicians.
- Consistent with previous findings and common sense, the importance of sample availability continued to come through loud and clear in the September conversations. Doctors bemoaned the way they needed to “juggle” sample use to meet patient needs during the worst days of the pandemic, and they are extremely grateful to have a renewed supply. Discount/copay cards were also included as objects of their appreciation.

**In summary, a calm has settled over our September discussants, even as hospital beds continue to fill with infected patients. Doctors and patients alike have gotten over the initial “confusion” of the pandemic, and now feel in much better control of the “new normal” which, in most ways, is very much like the old.**

**As a final note, the conversations reported above were occurring while the confusion as to the applicability and timing of “booster” shots was mounting, and thus our doctors were simply “staying tuned” on this front and were all ready to advise their patients to get booster shots when criteria for administration were clarified and approval “rolled out.”**

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# Conclusion

Given the findings presented above, it has been decided by the management of ThinkGen and Olson Research Group to suspend subsequent On Doctors' Minds<sup>SM</sup> conversations related to the pandemic for the foreseeable future. As discussed, the marketplace seems to have largely reached a steady state, making it unlikely that subsequent conversations would be informative.

However, in closing we would like to offer several notes to our loyal subscribers. These include:

- We hope that you have found our recounting of the natural history of the impact of the pandemic on physicians' practices to be as valuable as we have. Understanding this information as backdrop has been invaluable for the staff members at ThinkGen and Olson Research as we have proceeded over the last year to conduct "traditional" pharmaceutical market research under very non-traditional circumstances.
- ThinkGen and Olson Research stand ready to roll out additional waves of ODM research if we sense significant changes in the pandemic situation.
- Finally, in addition to valuable insights about the pandemic, this line of research has provided us with valuable insights on such important topics as physician reactions to various forms of pharmaceutical promotion. The "open mic" approach used for ODM, which allows clients to view unfiltered recordings of physician conversations, has provided a unique perspective, significantly different from that provided by reading quotations from anonymous respondents.

Therefore, the research team at ThinkGen continues to use these conversations, which are far more in depth than usual "depth interviews," for projects we conduct for such applications as Habit Mapping<sup>SM</sup> for Habit Engineering<sup>SM</sup>.

Thus, we would encourage our subscribers to take a look at some of the video recordings contained in [the repository](#) for this project, and to avail themselves of the opportunity to hear, directly from their customers, what is "on their minds."



For more information on the On Doctors' Minds<sup>SM</sup> project, and to discuss custom research, contact [Kathy.OConnell@think-gen.com](mailto:Kathy.OConnell@think-gen.com)