Observatory on the impact of the COVID-19 pandemic on the access to healthcare

Data period: 2019-2020

March 2021

Study performed by IQVIA with Farmindustria's non conditioning support

Premise and objectives of the study

The pandemic had important effects both on the initiation of and access to treatments, with significant consequences on clinical outcomes

The sanitary emergency that hit the country is having a significative impact on the healthcare system. The complexity of the pandemic and the issues related to the management of infected people challenged the healthcare system causing the saturation of both hospitals and intensive care units. Therefore, it created the need for new procedures and paths dedicated to both severe Covid-19 patients treated in hospital and less-severe patients in home care. Moreover, the pandemic produced a decrease in the access to treatments in all the areas, from oncology to respiratory and cardio-metabolic chronic diseases.

Along with the concerns related to the management of infected patients, the extended lockdown periods had important effects also on the access to visits and treatments of non-Covid patients producing significant consequences for patients' health and the organization of the healthcare system (hospital-territory integration, remote patient management).

The analysis of the IQVIA data allows to deepen the knowledge of the following topics:

- What are the main chronic diseases affected by Covid-19?
- What has been the reduction in new diagnoses and new treatments over the months?
- What has been the impact on requests for specialist visits and requests for exams?
- Was there a difference between the impact of the first and second wave of Covid-19?

In this context, IQVIA realized a study aimed at monitoring the impact of the pandemic on access to diagnoses and treatments and its evolution in the months to come. The study was realized by an ad-hoc observatory and with the non conditioning contribution of Farmindustria, and it will be updated every three months. The analysis is based on *Real World Data* evidences gathered from a sample of 900 general practitioners and a panel of 450 onco-hematologists representative of the reference universes.

In this document data refer to the 12 months from January to December 2020 which are compared to the same period of 2019. The study will continue for the entire 2021 with quarterly updates.

When it comes for primary care area, the results of this study highlight the indirect impact of Covid on territorial medicine, which is a fair proxy of the impact on outpatient activity volumes.

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Main findings

The contraction of the entire pharmaceutical sector recorded in 2020 (-3,6% MAT 12/2020) unveils the limitations to access to treatments both in the hospitals and in the pharmacies

In 2020, access to diagnoses and treatments in the main therapeutic areas witnessed a significant contraction compared to 2019

DATA SOURCES

IQVIA LPD (Longitudinal Patient Database) - Records collected from patient management software – Panel of 900 GPs
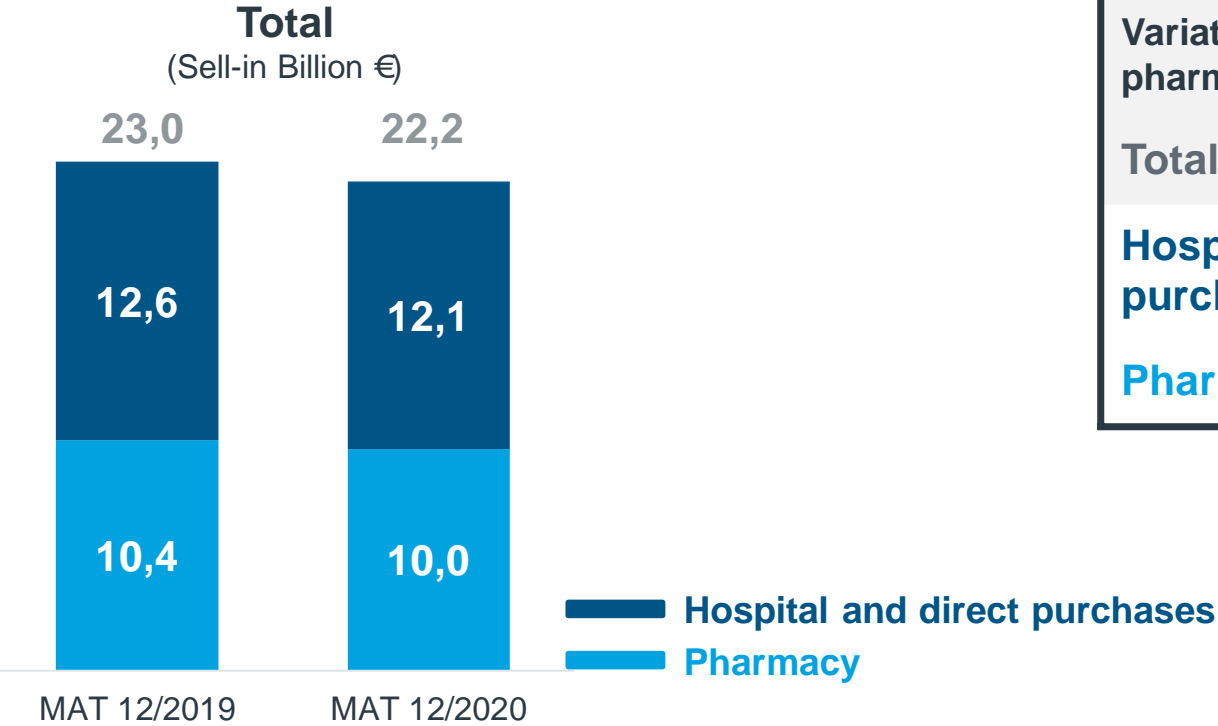
Oncology Dynamics: collection of patients data forms - Panel of 450 onco-hematologists

IQVIA National Integrated Database December 2020

- In 2020, the **main respiratory and cardio-metabolic pathologies** witnessed a significant contraction of the new diagnoses (-613.000 equal to a reduction of 13%), treatment initiations (-350.000, -10%), specialist visits (-2,2M, -31%) and requests for exams (-2,9M, -23%).

- In the **respiratory** area (COPD/asthma) there was a significant drop in new diagnoses (COPD: -84.000; Asthma: -195.000), new treatments (-65.000, -159.000), referral to specialists (-154.000, -158.000) and spirometry requests (-136.000, -157.000). The two waves of Covid-19 had a similar impact and 2020 data remains far from 2019, even there was a minor impact during the summer months.
  In the **cardiovascular area** (atrial fibrillation/heart failure/hypertension) data show a huge contraction in new diagnoses (AF -47.000, HF -19.000, hypertension -211.000), new treatments (-29.000, -3.000, -69.000), referrals to cardiologist (-301.000, -99.000, -1,1M) and requests for ECG (-214.000, -78.000, -1,3M). The two Covid-19 waves had the greatest impact on referrals to the cardiologist and requests for ECGs, generating a strong annual reduction, while there has been a partial recovery in the second half of the year of new diagnoses and new treatments.
  Diabetes area also recorded a drop in the number of new diagnoses (-58.000), new treatments (-24.000), referrals to diabetologists (-400.000) and request for exams (-1,1M). The two Covid-19 waves impacted mostly referrals to the diabetologist and blood glucose tests, while there was a partial recovery in the second half of the year on new diagnoses and new treatments.

- **Oncology** area also experienced a contraction in the access to diagnoses and treatments. The partial recovery achieved during the summer did not compensate the drop caused by the two Covid-19 waves: overall in 2020 there were 30.000 cancer diagnoses less than the ones made in 2019. In 2020 we observed a relevant reduction of screening requests for breast cancer (-9%), lung cancer (-9%) and colon cancer (-14%). In addition, new diagnoses for cancer dropped (-11%), as well as treatment initiations (-13%), surgeries (-18%) and hospitalizations (-16%). After the initial halt to screening and follow up visits due to the closure of many departments and ambulatories at the beginning of the year, there was partial recovery during the summer, which id not offset the contraction of diagnoses and treatments. The new contraction caused by the second pandemic wave contributed to increase the annual contraction with respect to 2019.

The contraction witnessed by the pharmaceutical sector (-3,6%) shows the limitation of access to treatments both in hospitals and pharmacies

Evolution of the pharmaceutical sector

Total
(Sell-in Billion €)

	MAT 12/2019	MAT 12/2020
Total	23,0	22,2
Hospital and direct purchases	12,6	12,1
Pharmacy	10,4	10,0

■ Hospital and direct purchases
■ Pharmacy

Variation of the pharmaceutical by channel	Values (Sell-in Billion €)
Total	- 3,6%
Hospital and direct purchases	- 3,9%
Pharmacy	- 3,1%

Values are expressed considering the weighted average price for the hospital channel and direct purchases (included the DPC channel), ex-factory for pharmacy channel - Class A, A with note, Class C and Class H are taken into account
Source: IQVIA National Integrated Database December 2020

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In 2020, Covid-19 had a relevant impact on the number of new diagnoses and treatments, in addition to the requests of specialist visits and exams

Real World Data from GPs – FOCUS: COPD, ASTHMA, ATRIAL FIBRILLATION, HEART FAILURE, HYPERTENSION, DIABETES

-613.000	-350.000	-2.230.000	-2.860.000
[-13%]	[-10%]	[-31%]	[-23%]
NEW DIAGNOSES	**NEW TREATMENTS**	**REFERRALS TO SPECIALISTS**	**REQUEST FOR TESTS/EXAMS**

Δ *January-December 2020 vs 2019 annual variation*
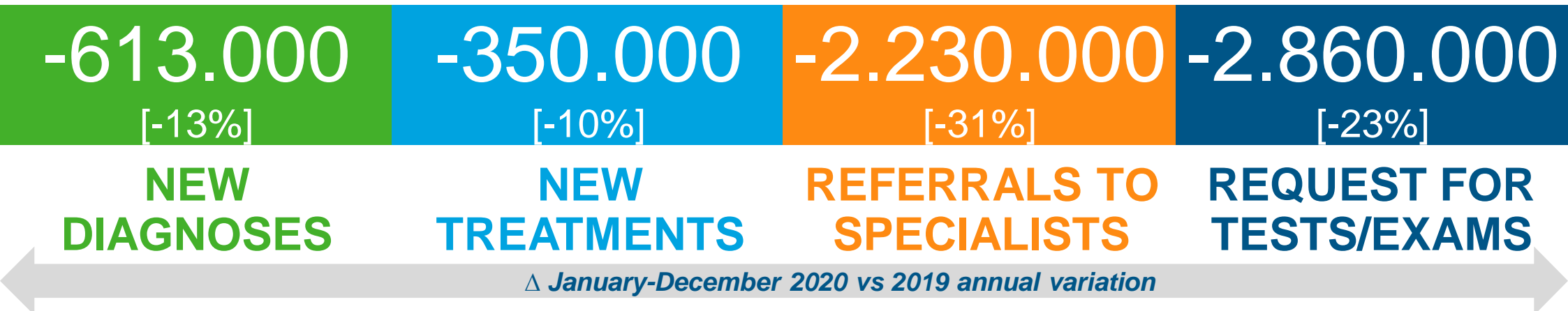
In 2020, chronic respiratory and cardio-metabolic pathologies witnessed an important contraction of exams requests, referrals to specialists, new diagnoses and treatments; respiratory area is the most affected, while diabetes was less impacted

Analysis of activities January-December 19/20 (YoY – % values)

-50% -45% -40% -35% -30% -25% -20% -15% -10% -5% 0%

Total deviation

Notes

New diagnoses
- -25%
- -19%
- -13%
- -10%
- -10%
- -9%

-613.000
(-13%)

- **All the therapeutic areas** witnessed a **reduction in new diagnoses between 9-25% YTD** with respect to 2019 (overall reduction of -13%)
- **COPD and Asthma** are the most affected pathologies with a reduction of diagnoses by **-25% e -19%**, followed by **AF (-13%), HF and hypertension (-10%)** and **diabetes (-9%)**, in which the impact of pandemic was better managed

New treatments
- -23%
- -18%
- -11%
- -2%
- -4%
- -5%

-350.000
(-10%)

- Overall, number of **new treatments** decreased by **-10% in 2020** with respect to 2019
- **COPD and Asthma** remain the most impacted areas (**-23% e -18%**), followed by **AF (-11%)** and **diabetes (-5%)**, while **hypertension (-4%)** and **heart failure (-2%)** were **less affected**

Referral to specialist
- -38%
- -42%
- -33%
- -32%
- -33%
- -22%

-2.230.000
(-31%)

- **Referrals** to specialists experienced a strong drop in all the therapeutic areas losing **-31%** overall
- Again, the **respiratory area** was the most hit with a **drop greater than 38%**; the **cardiological** area followed with a una **reduction higher than 30%; diabetes area** was the **least affected (-22%)**

Exams requests
- -46%
- -45%
- -29%
- -28%
- -31%
- -15%

-2.860.000
(-23%)

- **Requests for specialist exams** suffered an overall impact of **-23%** compared to the previous year
- Even in this case, the **respiratory** diseases suffered the most (around **-46%**), followed by cardiological ones (around **-29%**); **diabetes** is the **least impacted (-15%)**

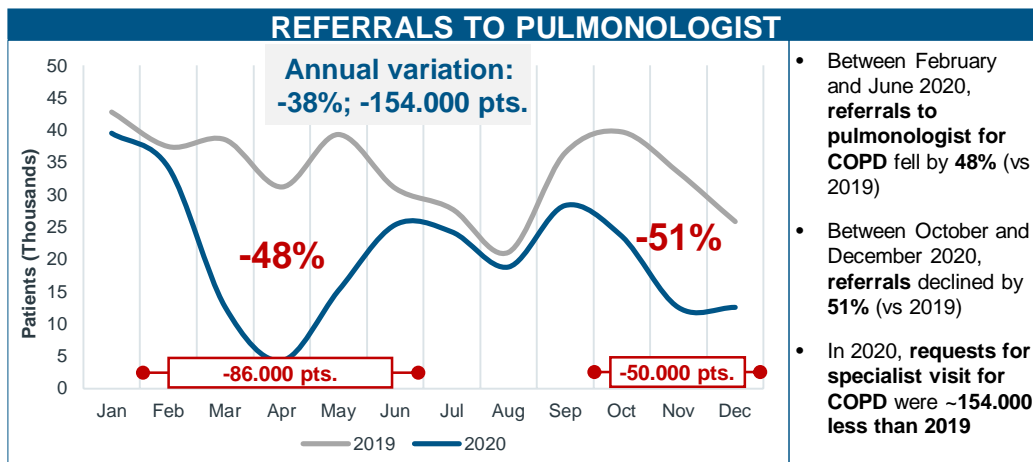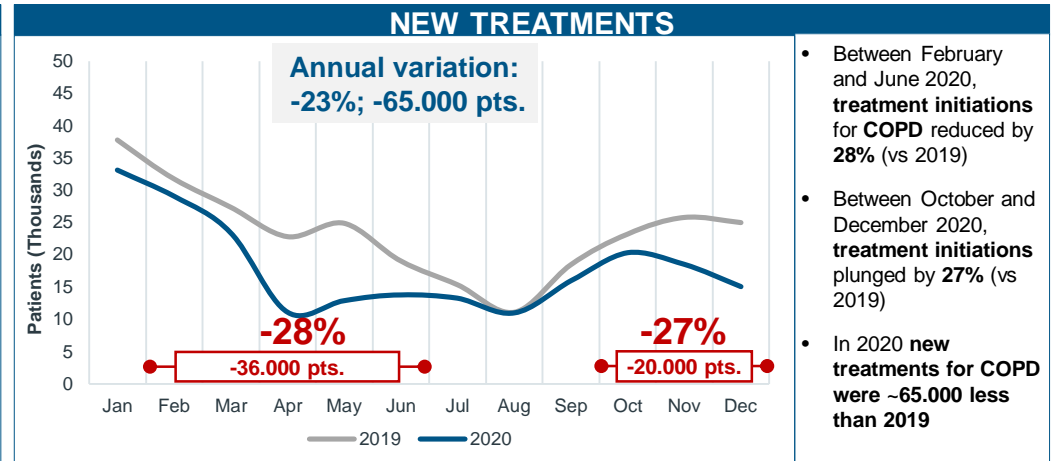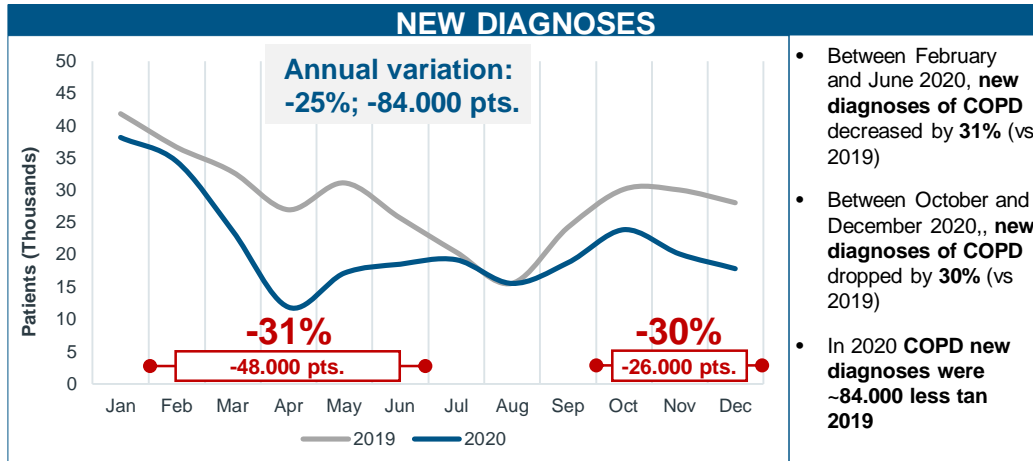Note: spirometry, glycemia, ECG

■ COPD　**■ Asthma**　**■ Atrial fibrillation**
■ Heart failure　**■ Hypertension**　**■ Diabetes**

Data source: IQVIA Longitudinal Patient Database (January 2019-December 2020)
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In the COPD area there were no significant variations in the impact of the two Covid-19 waves, which caused a significant drop of new diagnoses (-25%), new treatments (-23%), referral to specialists (-38%) and spirometry requests (-46%) with respect to 2019

COPD: comparison January-December 2020 vs 2019

NEW DIAGNOSES

Annual variation: -25%; -84.000 pts.

Patients (Thousands)

-31% -48.000 pts.

-30% -26.000 pts.

Jan Feb Mar Apr May Jun Jul Aug Sep Oct Nov Dec

— 2019 — 2020

- Between February and June 2020, **new diagnoses of COPD** decreased by **31%** (vs 2019)
- Between October and December 2020,, **new diagnoses of COPD** dropped by **30%** (vs 2019)
- In 2020 COPD new diagnoses were ~**84.000** less tan **2019**

NEW TREATMENTS

Annual variation: -23%; -65.000 pts.

Patients (Thousands)

-28% -36.000 pts.

-27% -20.000 pts.

Jan Feb Mar Apr May Jun Jul Aug Sep Oct Nov Dec

— 2019 — 2020

- Between February and June 2020, **treatment initiations for COPD** reduced by **28%** (vs 2019)
- Between October and December 2020, **treatment initiations** plunged by **27%** (vs 2019)
- In 2020 **new treatments for COPD** were ~**65.000 less than 2019**

REFERRALS TO PULMONOLOGIST

Annual variation: -38%; -154.000 pts.

Patients (Thousands)

-48% -86.000 pts.

-51% -50.000 pts.

Jan Feb Mar Apr May Jun Jul Aug Sep Oct Nov Dec

— 2019 — 2020

- Between February and June 2020, **referrals to pulmonologist for COPD** fell by **48%** (vs 2019)
- Between October and December 2020, **referrals** declined by **51%** (vs 2019)
- In 2020, **requests for specialist visit for COPD** were ~**154.000** less than 2019

SPIROMETRY REQUESTS

Annual variation: -46%; -136.000 pts.

Patients (Thousands)

-55% -74.000 pts.

-62% -45.000 pts.

Jan Feb Mar Apr May Jun Jul Aug Sep Oct Nov Dec

— 2019 — 2020

- Between February and June 2020, **spirometry requests for COPD** lowered by **55%** (vs 2019)
- Between October and December 2020, **spirometry requests for COPD** dropped by **62%** (vs 2019)
- In 2020, **spirometry requests for COPD** were ~**136.000 less than 2019**

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Covid-19 had a similar effect in both waves even in Asthma area, which witnessed a significant annual contraction in new diagnoses (-19%), new treatments (-18%), referrals to specialists (-42%) and spirometry requests (-45%) with respect to 2019

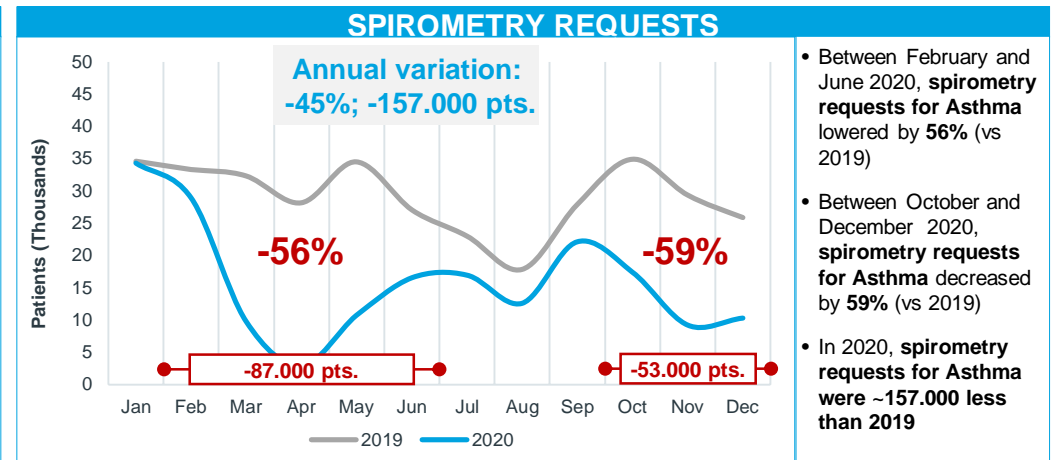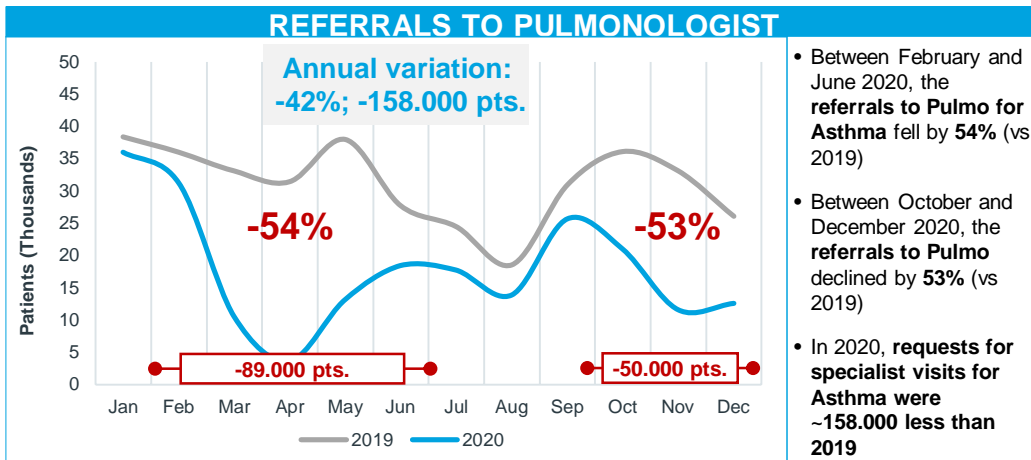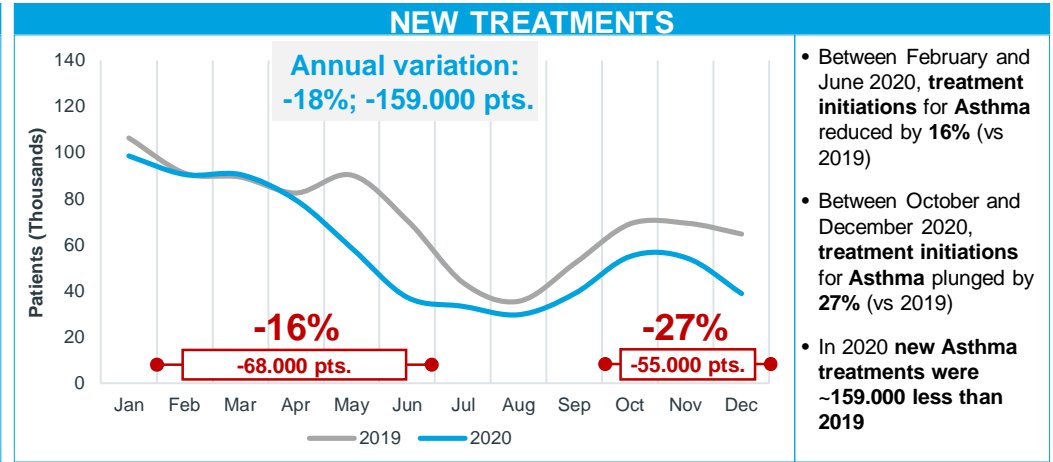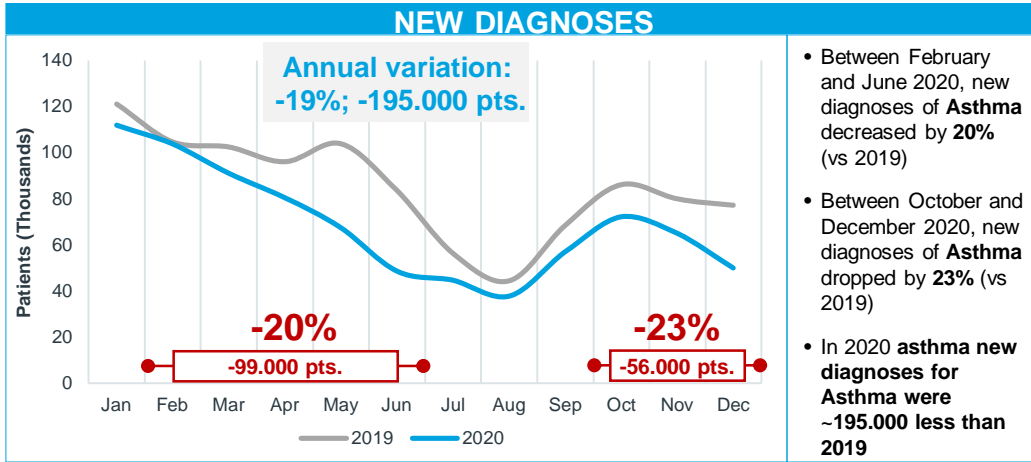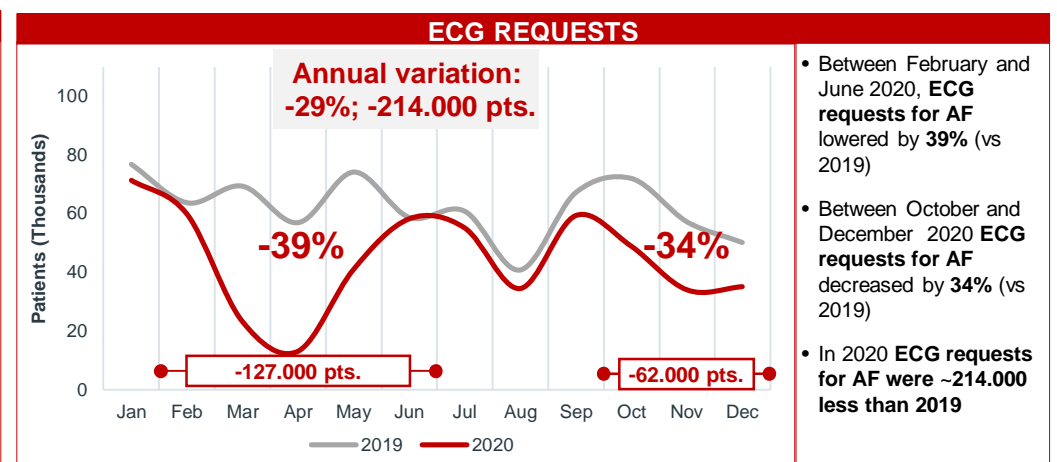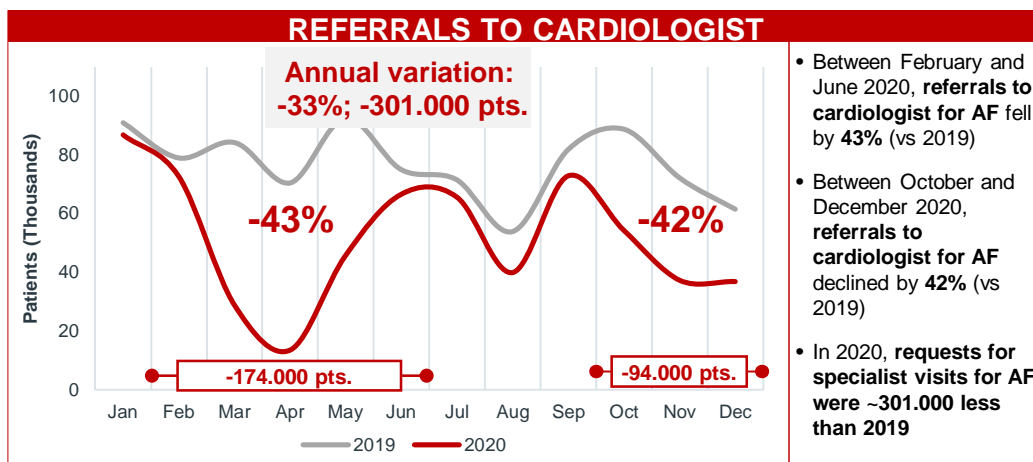## *Asthma: comparison January-December 2020 vs 2019*

NEW DIAGNOSES

Patients (Thousands)

Annual variation: -19%; -195.000 pts.

-20% -99.000 pts.

-23% -56.000 pts.

— 2019 — 2020

- Between February and June 2020, new diagnoses of **Asthma** decreased by **20%** (vs 2019)
- Between October and December 2020, new diagnoses of **Asthma** dropped by **23%** (vs 2019)
- In 2020 **asthma new diagnoses for Asthma were ~195.000 less than 2019**

NEW TREATMENTS

Patients (Thousands)

Annual variation: -18%; -159.000 pts.

-16% -68.000 pts.

-27% -55.000 pts.

— 2019 — 2020

- Between February and June 2020, **treatment initiations** for Asthma reduced by **16%** (vs 2019)
- Between October and December 2020, **treatment initiations** for **Asthma** plunged by **27%** (vs 2019)
- In 2020 **new Asthma treatments were ~159.000 less than 2019**

REFERRALS TO PULMONOLOGIST

Patients (Thousands)

Annual variation: -42%; -158.000 pts.

-54% -89.000 pts.

-53% -50.000 pts.

— 2019 — 2020

- Between February and June 2020, the **referrals to Pulmo for Asthma** fell by **54%** (vs 2019)
- Between October and December 2020, the **referrals to Pulmo** declined by **53%** (vs 2019)
- In 2020, **requests for specialist visits for Asthma were ~158.000 less than 2019**

SPIROMETRY REQUESTS

Patients (Thousands)

Annual variation: -45%; -157.000 pts.

-56% -87.000 pts.

-59% -53.000 pts.

— 2019 — 2020

- Between February and June 2020, **spirometry requests for Asthma** lowered by **56%** (vs 2019)
- Between October and December 2020, **spirometry requests for Asthma** decreased by **59%** (vs 2019)
- In 2020, **spirometry requests for Asthma were ~157.000 less than 2019**

Data source: IQVIA Longitudinal Patient Database (January 2019-December 2020)
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In AF area the two Covid-19 waves had a similar impact on referrals to cardiologists and ECG requests, increasing the annual contraction (-33% and -29%); new diagnoses and treatments were better managed during the second wave thus mitigating the annual gap (-13%, -11%)
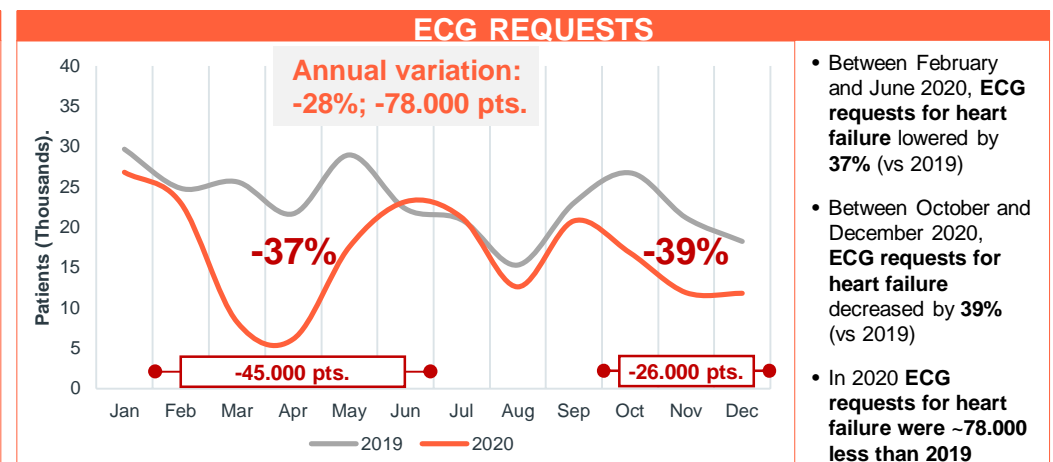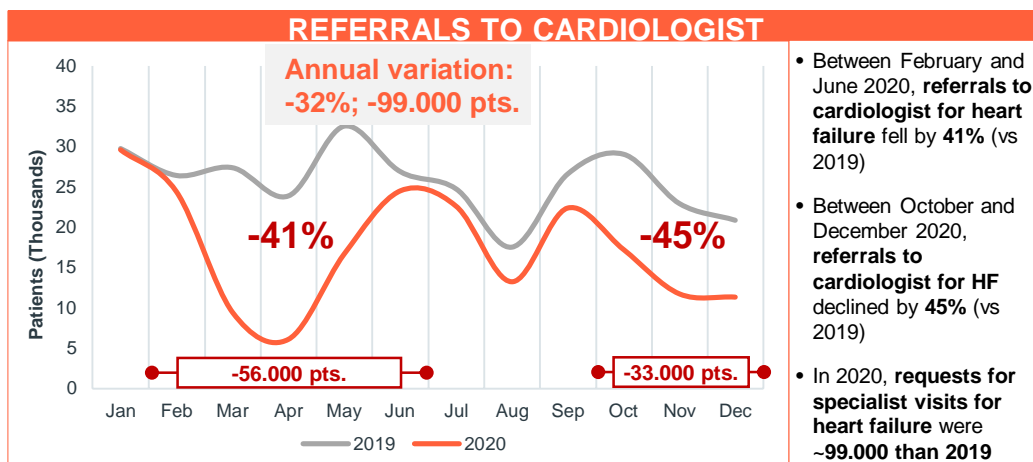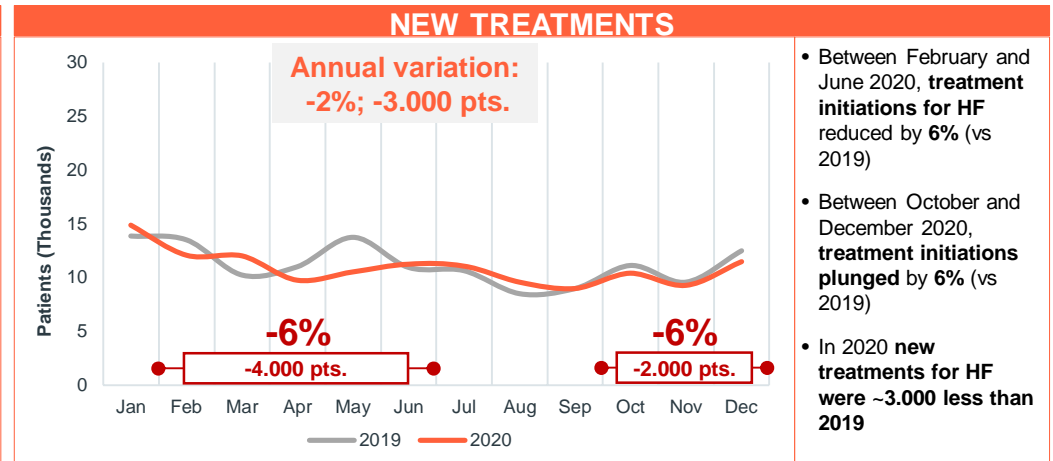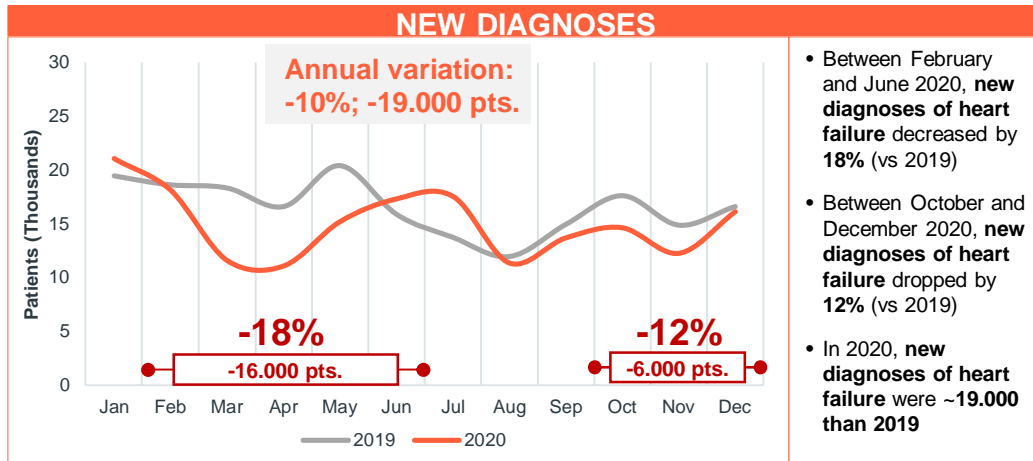
Atrial fibrillation: comparison January-December 2020 vs 2019

NEW DIAGNOSES

Annual variation:
-13%; -47.000 pts.

Patients (Thousands)

-26%
-42.000 pts.

-7%
-6.000 pts.

Jan Feb Mar Apr May Jun Jul Aug Sep Oct Nov Dec

— 2019 — 2020

- Between February and June 2020, **new diagnoses of AF decreased by 26%** (vs 2019)
- Between October and December 2020, **new diagnoses of AF dropped by 7%** (vs 2019)
- In 2020 **new diagnoses of atrial fibrillation were ~47.000 less than 2019**

NEW TREATMENTS

Annual variation:
-11%; -29.000 pts.

Patients (Thousands)

-23%
-27.000 pts.

-4%
-3.000 pts.

Jan Feb Mar Apr May Jun Jul Aug Sep Oct Nov Dec

— 2019 — 2020

- Between February and June 2020, **treatment initiations for AF reduced by 23%** (vs 2019)
- Between October and December 2020, **treatment initiations for AF plunged by 4%** (vs 2019)
- In 2020 **new treatments for AF were ~29.000 less than 2019**

REFERRALS TO CARDIOLOGIST

Annual variation:
-33%; -301.000 pts.

Patients (Thousands)

-43%
-174.000 pts.

-42%
-94.000 pts.

Jan Feb Mar Apr May Jun Jul Aug Sep Oct Nov Dec

— 2019 — 2020

- Between February and June 2020, **referrals to cardiologist for AF fell by 43%** (vs 2019)
- Between October and December 2020, **referrals to cardiologist for AF declined by 42%** (vs 2019)
- In 2020, **requests for specialist visits for AF were ~301.000 less than 2019**

ECG REQUESTS

Annual variation:
-29%; -214.000 pts.

Patients (Thousands)

-39%
-127.000 pts.

-34%
-62.000 pts.

Jan Feb Mar Apr May Jun Jul Aug Sep Oct Nov Dec

— 2019 — 2020

- Between February and June 2020, **ECG requests for AF lowered by 39%** (vs 2019)
- Between October and December 2020 **ECG requests for AF decreased by 34%** (vs 2019)
- In 2020 **ECG requests for AF were ~214.000 less than 2019**

Even in heart failure area Covid-19 had a similar effect in both waves, causing an annual contraction that was more contained for new diagnoses (-10%) and new treatments (-2%) and more significant for referrals to cardiologists (-32%) and ECG requests (-28%)
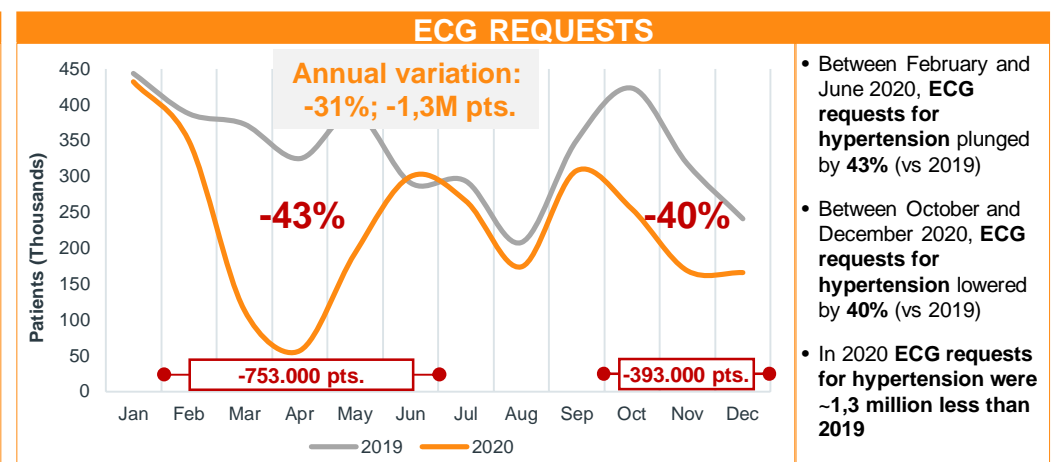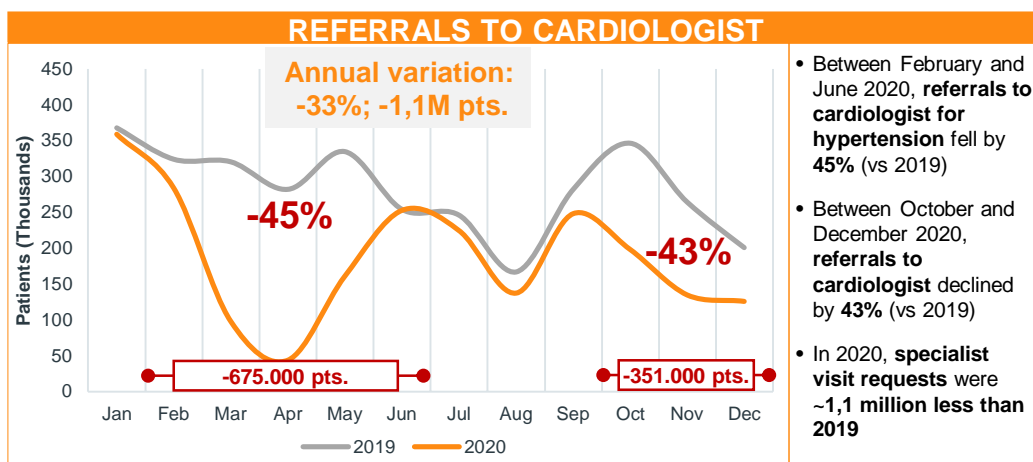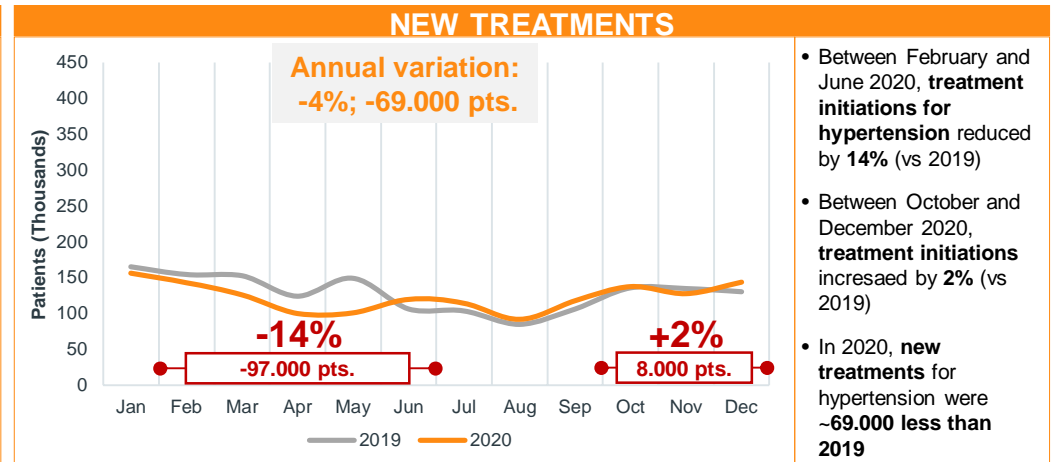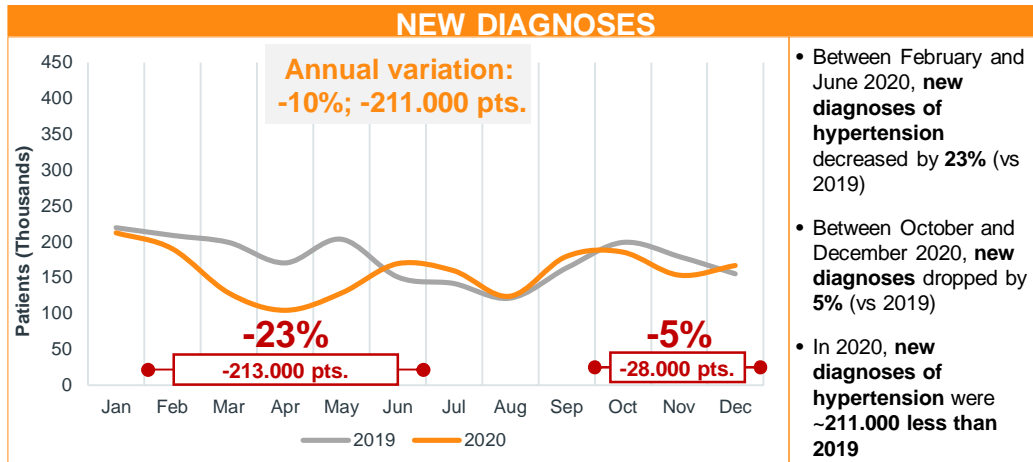
Heart failure: comparison January-December 2020 vs 2019

NEW DIAGNOSES

Annual variation: -10%; -19.000 pts.

-18% -16.000 pts.

-12% -6.000 pts.

— 2019 — 2020

- Between February and June 2020, **new diagnoses of heart failure** decreased by **18%** (vs 2019)
- Between October and December 2020, **new diagnoses of heart failure** dropped by **12%** (vs 2019)
- In 2020, **new diagnoses of heart failure were ~19.000 than 2019**

NEW TREATMENTS

Annual variation: -2%; -3.000 pts.

-6% -4.000 pts.

-6% -2.000 pts.

— 2019 — 2020

- Between February and June 2020, **treatment initiations for HF** reduced by **6%** (vs 2019)
- Between October and December 2020, **treatment initiations plunged** by **6%** (vs 2019)
- In 2020 **new treatments for HF were ~3.000 less than 2019**

REFERRALS TO CARDIOLOGIST

Annual variation: -32%; -99.000 pts.

-41%

-45%

-56.000 pts.

-33.000 pts.

— 2019 — 2020

- Between February and June 2020, **referrals to cardiologist for heart failure** fell by **41%** (vs 2019)
- Between October and December 2020, **referrals to cardiologist for HF** declined by **45%** (vs 2019)
- In 2020, **requests for specialist visits for heart failure were ~99.000 than 2019**

ECG REQUESTS

Annual variation: -28%; -78.000 pts.

-37%

-39%

-45.000 pts.

-26.000 pts.

— 2019 — 2020

- Between February and June 2020, **ECG requests for heart failure** lowered by **37%** (vs 2019)
- Between October and December 2020, **ECG requests for heart failure** decreased by **39%** (vs 2019)
- In 2020 **ECG requests for heart failure were ~78.000 less than 2019**

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In the hypertension area the two waves had a similar effect on referrals to cardiologist and ECG requests, increasing the annual contraction (-33% and -31%); new diagnoses and treatments were better managed mitigating the annual gap (-10% and -4%)
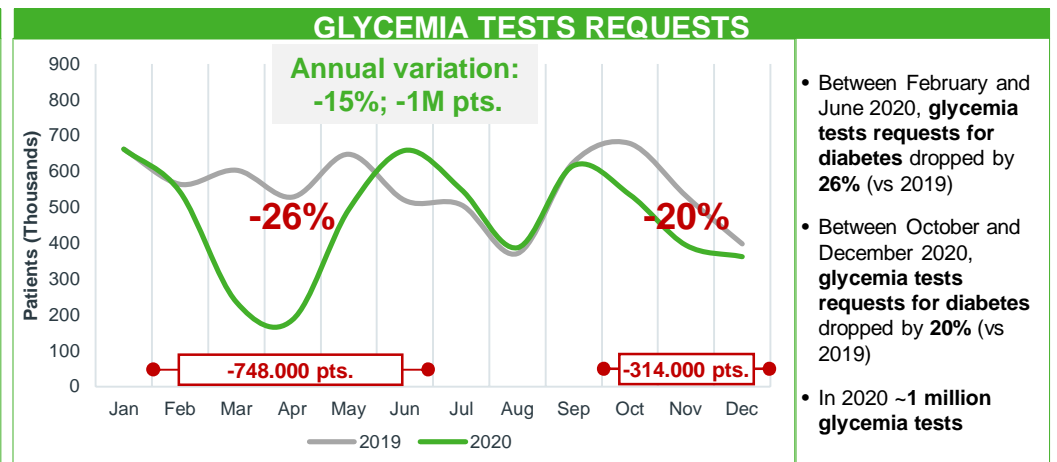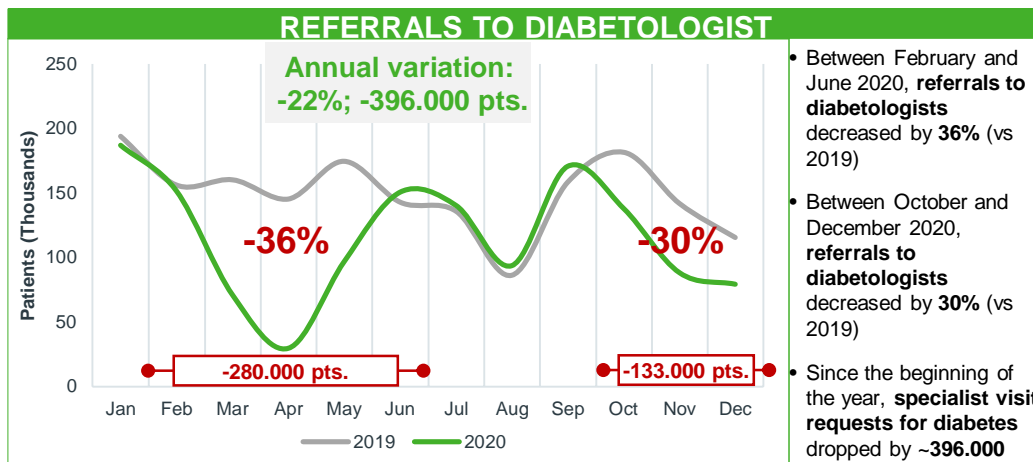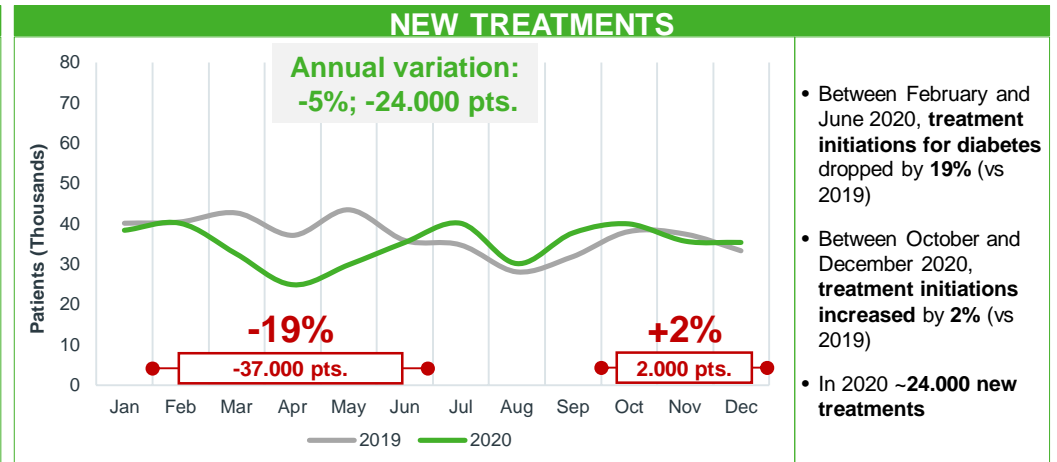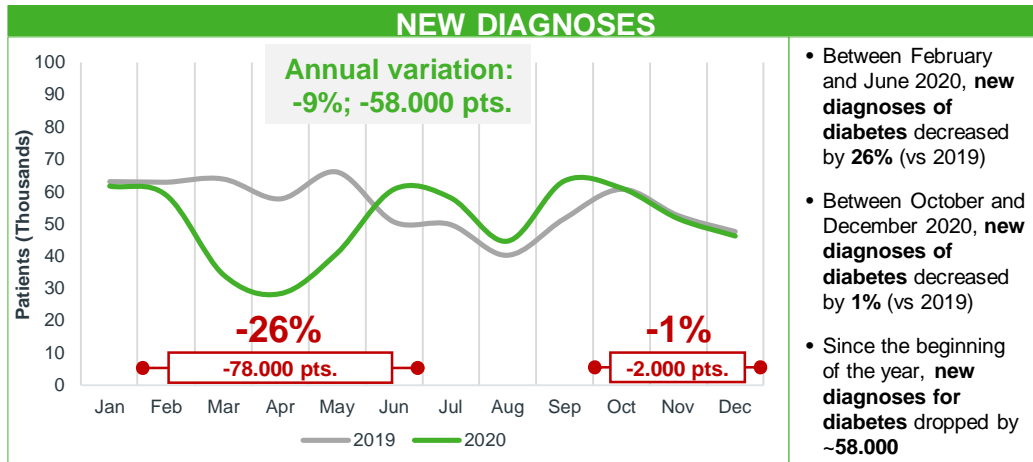
Hypertension: comparison January-December 2020 vs 2019

NEW DIAGNOSES

Annual variation: -10%; -211.000 pts.

-23% -213.000 pts.

-5% -28.000 pts.

2019   2020

- Between February and June 2020, **new diagnoses of hypertension** decreased by **23%** (vs 2019)
- Between October and December 2020, **new diagnoses** dropped by **5%** (vs 2019)
- In 2020, **new diagnoses of hypertension** were ~**211.000 less than 2019**

NEW TREATMENTS

Annual variation: -4%; -69.000 pts.

-14% -97.000 pts.

+2% 8.000 pts.

2019   2020

- Between February and June 2020, **treatment initiations for hypertension** reduced by **14%** (vs 2019)
- Between October and December 2020, **treatment initiations** increaed by **2%** (vs 2019)
- In 2020, **new treatments for hypertension** were ~**69.000 less than 2019**

REFERRALS TO CARDIOLOGIST

Annual variation: -33%; -1,1M pts.

-45% -675.000 pts.

-43% -351.000 pts.

2019   2020

- Between February and June 2020, **referrals to cardiologist for hypertension** fell by **45%** (vs 2019)
- Between October and December 2020, **referrals to cardiologist** declined by **43%** (vs 2019)
- In 2020, **specialist visit requests** were ~**1,1 million less than 2019**

ECG REQUESTS

Annual variation: -31%; -1,3M pts.

-43% -753.000 pts.

-40% -393.000 pts.

2019   2020

- Between February and June 2020, **ECG requests for hypertension** plunged by **43%** (vs 2019)
- Between October and December 2020, **ECG requests for hypertension** lowered by **40%** (vs 2019)
- In 2020 **ECG requests for hypertension** were ~**1,3 million less than 2019**

Data source: IQVIA Longitudinal Patient Database (January 2019-December 2020)

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In the diabetes area the reduction of diabetologists visits and exams requests has been similar and caused a greater annual drop (-22% and -15%) of new diagnoses and treatments, which recovery after the first wave mitigated the annual impact (-9% and -5%)

*Diabetes: comparison January-December 2020 vs 2019*

NEW DIAGNOSES

Annual variation:
-9%; -58.000 pts.

-26%
-78.000 pts.

-1%
-2.000 pts.

— 2019 — 2020

- Between February and June 2020, **new diagnoses of diabetes** decreased by **26%** (vs 2019)
- Between October and December 2020, **new diagnoses of diabetes** decreased by **1%** (vs 2019)
- Since the beginning of the year, **new diagnoses for diabetes** dropped by ~**58.000**

NEW TREATMENTS

Annual variation:
-5%; -24.000 pts.

-19%
-37.000 pts.

+2%
2.000 pts.

— 2019 — 2020

- Between February and June 2020, **treatment initiations for diabetes** dropped by **19%** (vs 2019)
- Between October and December 2020, **treatment initiations increased** by **2%** (vs 2019)
- In 2020 ~**24.000 new treatments**

REFERRALS TO DIABETOLOGIST

Annual variation:
-22%; -396.000 pts.

-36%
-280.000 pts.

-30%
-133.000 pts.

— 2019 — 2020

- Between February and June 2020, **referrals to diabetologists** decreased by **36%** (vs 2019)
- Between October and December 2020, **referrals to diabetologists** decreased by **30%** (vs 2019)
- Since the beginning of the year, **specialist visit requests for diabetes** dropped by ~**396.000**

GLYCEMIA TESTS REQUESTS

Annual variation:
-15%; -1M pts.

-26%

-20%

-748.000 pts.

-314.000 pts.

— 2019 — 2020

- Between February and June 2020, **glycemia tests requests for diabetes** dropped by **26%** (vs 2019)
- Between October and December 2020, **glycemia tests requests for diabetes** dropped by **20%** (vs 2019)
- In 2020 ~**1 million glycemia tests**

Data source: IQVIA Longitudinal Patient Database (January 2019-December 2020)

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In the oncological area the impact of the second wave has been lower for mammography and colonoscopy mitigating the annual reduction (-9% and -14%), but greater for CT scan despite the increase in December (+70%) that contributed to reduce the annual variation (-9%)

Oncological screening: comparison January-December 2020 vs 2019

BREAST CANCER SCREENING REQUESTS

Annual variation: -9%

Variation 2020 vs 2019 (MoM)

-22%   -17%
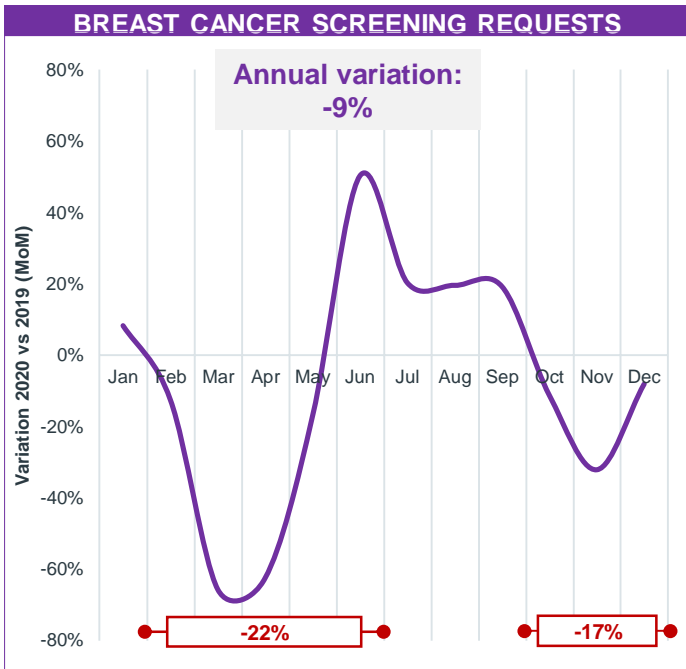
- Between **February and June 2020**, the **requests of mammography screening to identify breast cancer decreased by 22%** with respect to the same period in 2019
- The greatest reduction is recorded between **march and april 2020 (-64%)**
- **Between June and september 2020** it is observed an **increase of 28%** vs 2019, that is quite substantial in **June (+50%)**
- Between October and December 2020, there is **another drop** of **17%** vs 2019

PULMONARY CT SCAN REQUESTS FOR CANCER

Annual variation: -9%

Variation 2020 vs 2019 (MoM)

-7%   -13%
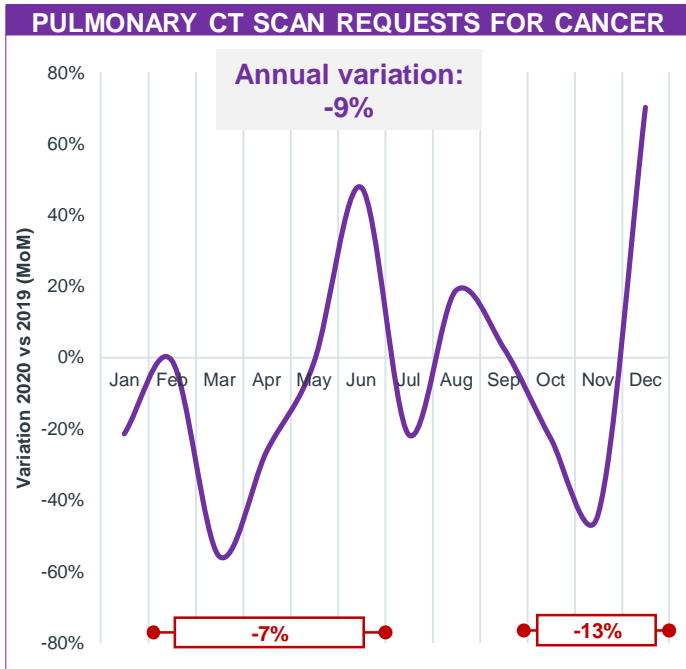
- Between **February and June 2020**, the **requests of CT scan to identify lung cancer decreased by 7%** with respect to the same period in 2019
- The greatest reduction is recorded between **march and april 2020 (-41%)**
- **Between June and september 2020** it is observed an **increase of 10%** vs 2019, that is quite substantial in **June (+48%)**
- Between October and December 2020, there is **another drop** of **13%** vs 2019

COLONOSCOPY REQUESTS

Annual variation: -14%
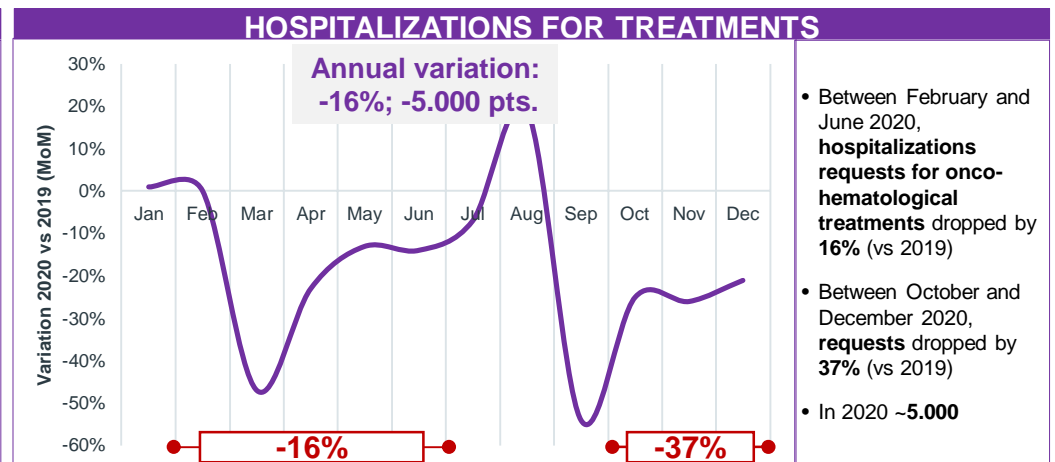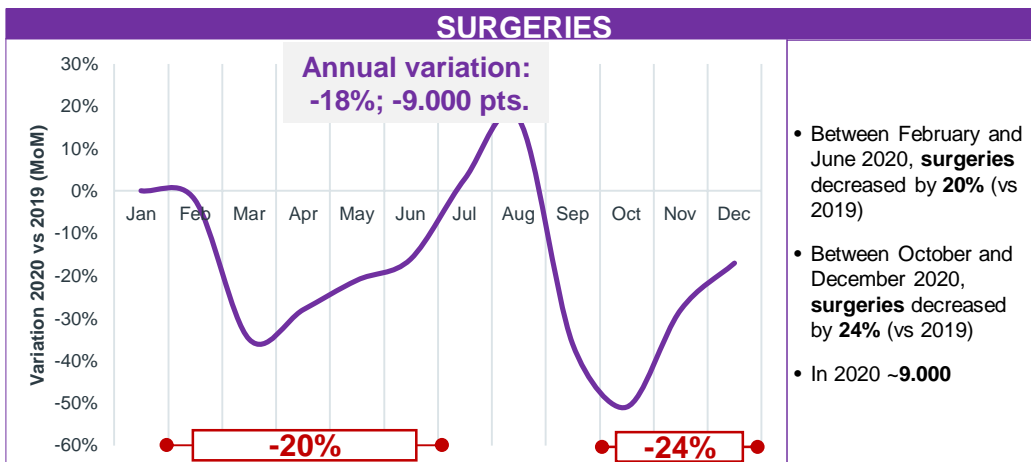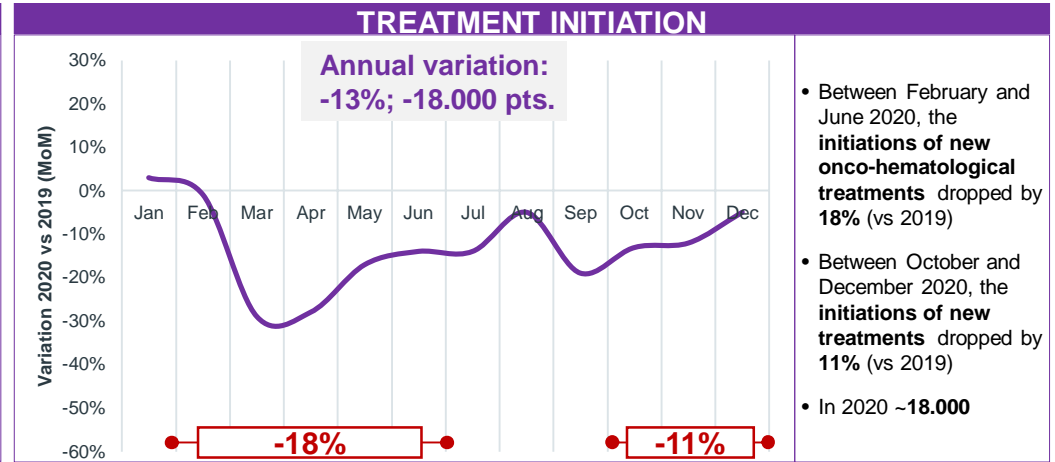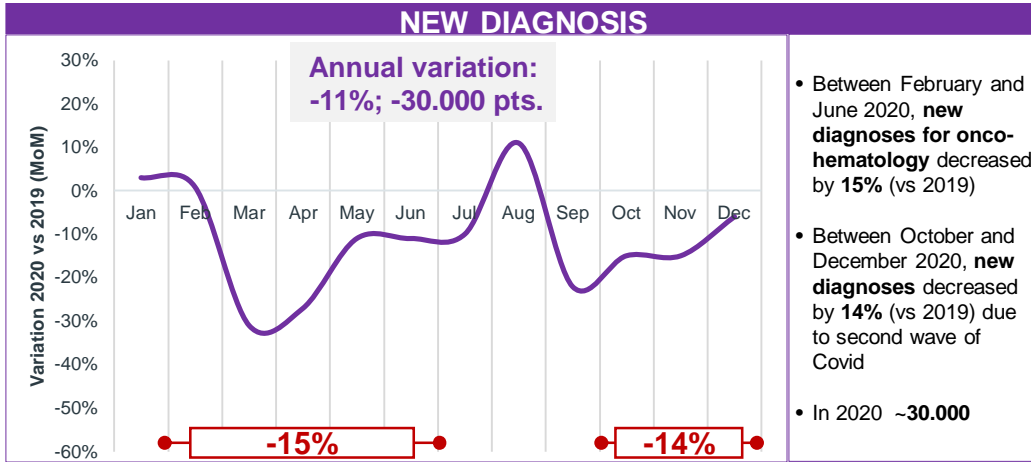
Variation 2020 vs 2019 (MoM)

-34%   -13%
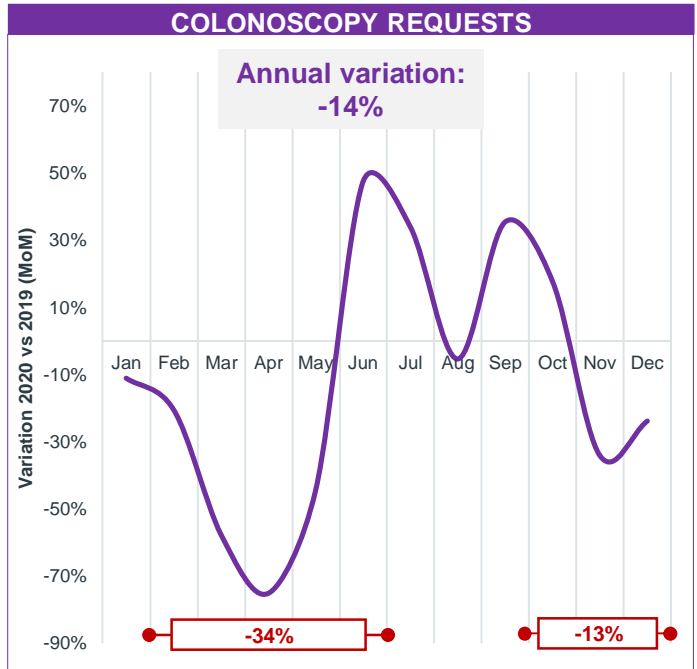
- Between **February and June 2020**, the **requests of colonoscopy to identify colon cancer decreased by 34%** with respect to the same period in 2019
- The greatest reduction is recorded between **march and april 2020 (-66%)**
- **Between June and september 2020** it is observed an **increase of 29%** vs 2019, that is quite substantial in **June (+47%)**
- Between October and December 2020, there is **another drop** of **13%** vs 2019
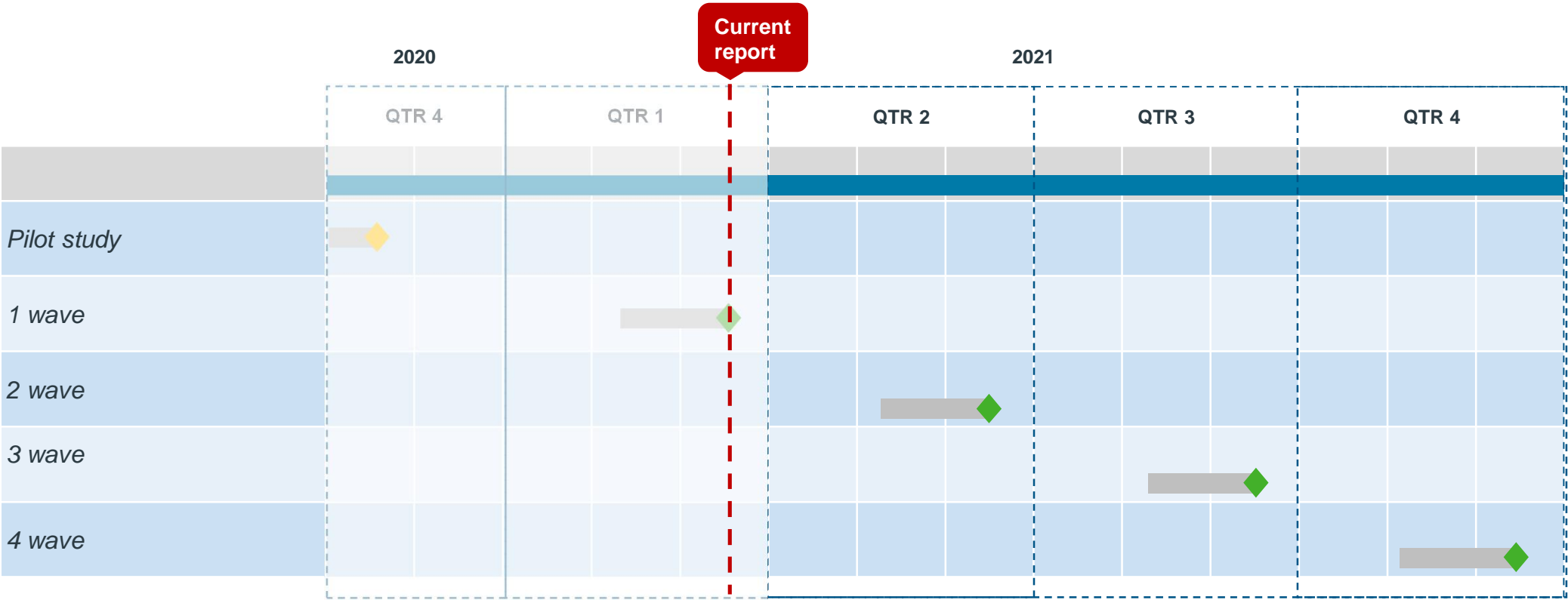
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The impact of the second wave has been lower than the first one for new diagnoses and treatments mitigating the annual reduction (-11% and -13%), but greater for surgeries and hospitalizations causing higher annual drop (-18% and -16%)

Onco-hematology - diagnosis, treatments, hospitalizations, surgeries: comparison January-December 2020 vs 2019

NEW DIAGNOSIS

Annual variation: -11%; -30.000 pts.

-15%   -14%

- Between February and June 2020, **new diagnoses for onco-hematology** decreased by **15%** (vs 2019)
- Between October and December 2020, **new diagnoses** decreased by **14%** (vs 2019) due to second wave of Covid
- In 2020 **~30.000**

TREATMENT INITIATION

Annual variation: -13%; -18.000 pts.

-18%   -11%

- Between February and June 2020, the **initiations of new onco-hematological treatments** dropped by **18%** (vs 2019)
- Between October and December 2020, the **initiations of new treatments** dropped by **11%** (vs 2019)
- In 2020 ~**18.000**

SURGERIES

Annual variation: -18%; -9.000 pts.

-20%   -24%

- Between February and June 2020, **surgeries** decreased by **20%** (vs 2019)
- Between October and December 2020, **surgeries** decreased by **24%** (vs 2019)
- In 2020 ~**9.000**

HOSPITALIZATIONS FOR TREATMENTS

Annual variation: -16%; -5.000 pts.

-16%   -37%

- Between February and June 2020, **hospitalizations requests for onco-hematological treatments** dropped by **16%** (vs 2019)
- Between October and December 2020, **requests** dropped by **37%** (vs 2019)
- In 2020 ~**5.000**

The present report contains updated data with December 2020; the next wave will be released in June 2021 and it will include updated data with March 2021

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