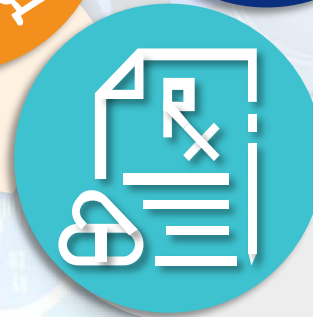


Major Themes

Assessment of the disruption caused by COVID-19 Pandemic to oncology practices and patients

IMPACT ON PRACTICE DYNAMICS

- Pandemic is expected to cause disruptions to independent and hospital affiliated oncology practices
- ~80% of physicians reported a moderate-severe disruptive impact on practice due to COVID-19 pandemic
 - Decrease in patient volume, absenteeism of physicians, nurses, admin staff and disruption in delivery of lab supplies, masks & gloves were reported to be most disruptive to practice
- About half of the physicians reported experiencing a ~30% decrease in new and existing patient volume
- ~70% of physicians reported an increase in use of telemedicine, phone consultations & rescheduling of appointments
- 52% of physicians reported using alternate site such as home or outpatient hospital to provide active therapy



IMPACT ON PRACTICES' PARTICIPATION IN CLINICAL TRIALS

- Practices reported that 46% of their clinical trials have been paused or discontinued due to COVID-19 pandemic
- Accruals to newly launched trials were reported to be significantly impacted by COVID-19 pandemic

IMPACT ON PRACTICE REVENUES

- ~60% of physicians reported a decrease in practice and ancillary service revenues
- On average, physicians estimate practices to continue to operate for 6-7 months as they do presently without major changes if dynamics of pandemic were to continue
- ~2/3rd of physicians reported receiving payer assistance in the form of loans, quicker payment of claims and relaxed prior approvals