How COVID-19 impacts HCP channel preferences and the ongoing health implications of COVID-19 on long hauler patients

European Thought Leadership

Webinar: September 30, 2021

IQVIA speakers for today's session

Sarah Rickwood

Vice President

EMEA Thought Leadership and Marketing

Natalie Harb

Senior Principal

Global Consulting & Analytics Solutions

Agenda

+ COVID-19's Impact on HCP's Channel Preferences

+ HCP's Feedback on the Ongoing Health Implications of COVID-19 Long Haulers Across the EU4 & UK

+ Closing Remarks

+ Q&A

Impact of COVID-19 on the Pharmaceutical Market – EU4+UK

HCP Channel Preference in an increasing complex environment

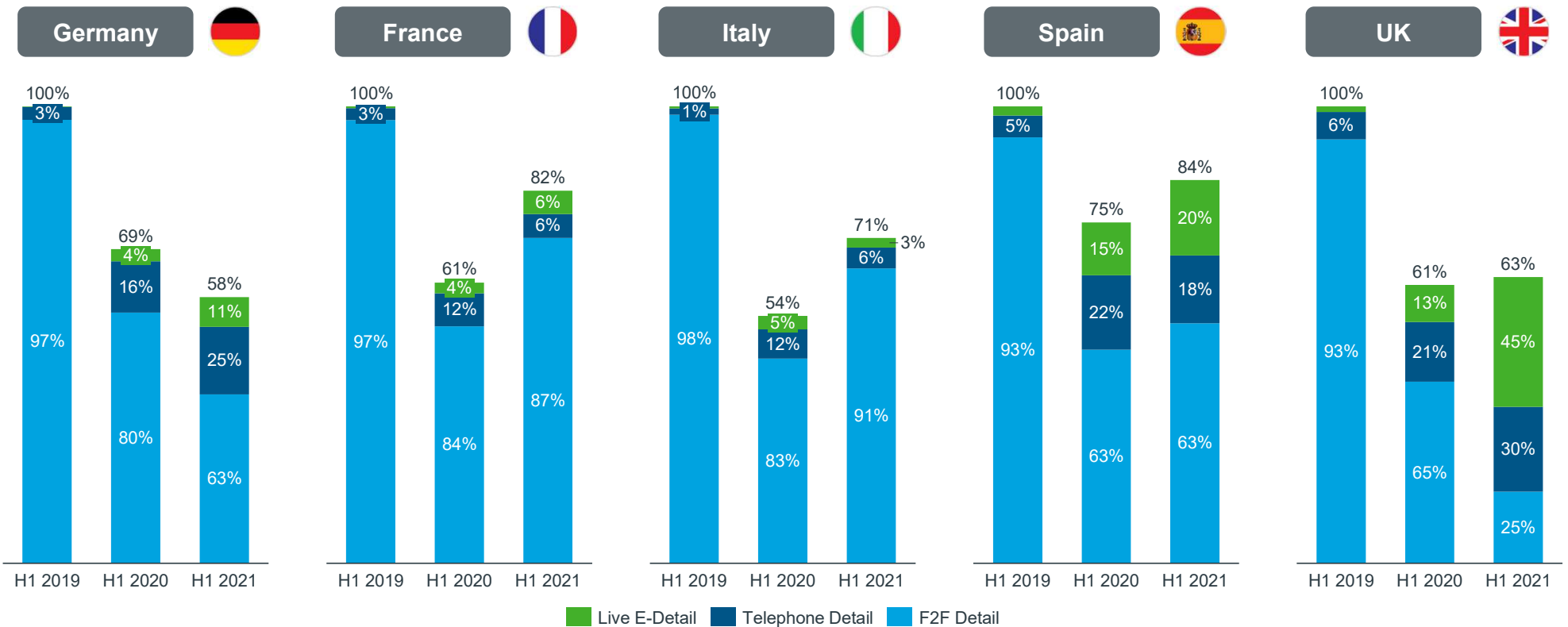Sarah Rickwood, VP, EMEA Thought Leadership & Marketing

In this section we will cover-

+ What does the current promotional landscape look like and how has it changed since COVID-19?

+ How has the pandemic impacted HCP channel preference and what are they looking for in the future?

+ How can companies address the increasing complexity in HCP engagement?

IQVIA

Mid-way through 2021, amount of interactive time with HCPs is still well below pre-pandemic levels

Spain and UK have shown the strongest pivot to digital detailing channels

1:1 Interactive Contact Time by Channel

Germany

- H1 2019: 100% — 3% / 97%
- H1 2020: 69% — 4% / 16% / 80%
- H1 2021: 58% — 11% / 25% / 63%

France

- H1 2019: 100% — 3% / 97%
- H1 2020: 61% — 4% / 12% / 84%
- H1 2021: 82% — 6% / 6% / 87%

Italy

- H1 2019: 100% — 1% / 98%
- H1 2020: 54% — 5% / 12% / 83%
- H1 2021: 71% — 3% / 6% / 91%

Spain

- H1 2019: 100% — 5% / 93%
- H1 2020: 75% — 15% / 22% / 63%
- H1 2021: 84% — 20% / 18% / 63%

UK

- H1 2019: 100% — 6% / 93%
- H1 2020: 61% — 13% / 21% / 65%
- H1 2021: 63% — 45% / 30% / 25%

Legend: ■ Live E-Detail ■ Telephone Detail ■ F2F Detail
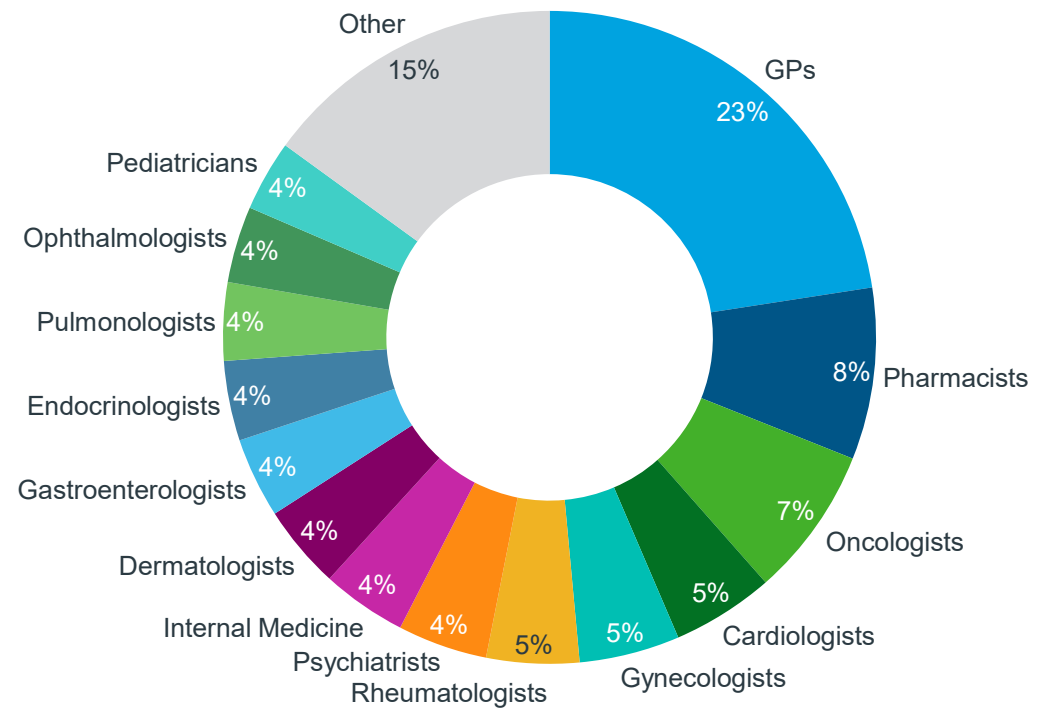
EU4 & UK COVID-19 Quarterly Webinar: HCP Channel Preference in an increasing complex environment

IQVIA

5

We surveyed over 8500 HCPs across EU4+UK, covering a wide variety of specialties

EU4+UK Total	8,594
🇩🇪	1,108
🇫🇷	1,569
🇮🇹	3,046
🇪🇸	1,809
🇬🇧	1,062

EU4+UK Total Respondents by Specialty

- GPs 23%
- Pharmacists 8%
- Oncologists 7%
- Cardiologists 5%
- Gynecologists 5%
- Rheumatologists 5%
- Psychiatrists 4%
- Internal Medicine 4%
- Dermatologists 4%
- Gastroenterologists 4%
- Endocrinologists 4%
- Pulmonologists 4%
- Ophthalmologists 4%
- Pediatricians 4%
- Other 15%

Source: IQVIA ChannelDynamics Channel Preference Survey July 2021; Oncologists include haematologists & radiologists; Endocrinologists include diabetologists & diabetic nurses; Internal medicine includes infectious disease

IQVIA

Pre-pandemic, HCP channel preference was relatively stable, but significant shifts were driven by the pandemic

Restrictions on F2F due to COVID-19 drove an increase in preference for online resources

HCP Promotional Channel Preference (July 2017 – July 2021*)

When asked to consider a context with no restrictions on F2F, HCP preference for individual interactions bounces back

On average, preference for rep interactions in an unrestricted future were 37% higher than in the 2021 restricted context, and 28% higher than pre-pandemic levels

HCP Preference for Individual Interactions (July 2021)

Legend: ■ 2021 With restrictions   ■ 2021 Without restrictions   ■ 2019 Pre-pandemic

Germany: 18%, 64%, 34%
France: 33%, 66%, 35%
Italy: 28%, 62%, 33%
Spain: 25%, 71%, 32%
UK: 29%, 54%, 41%
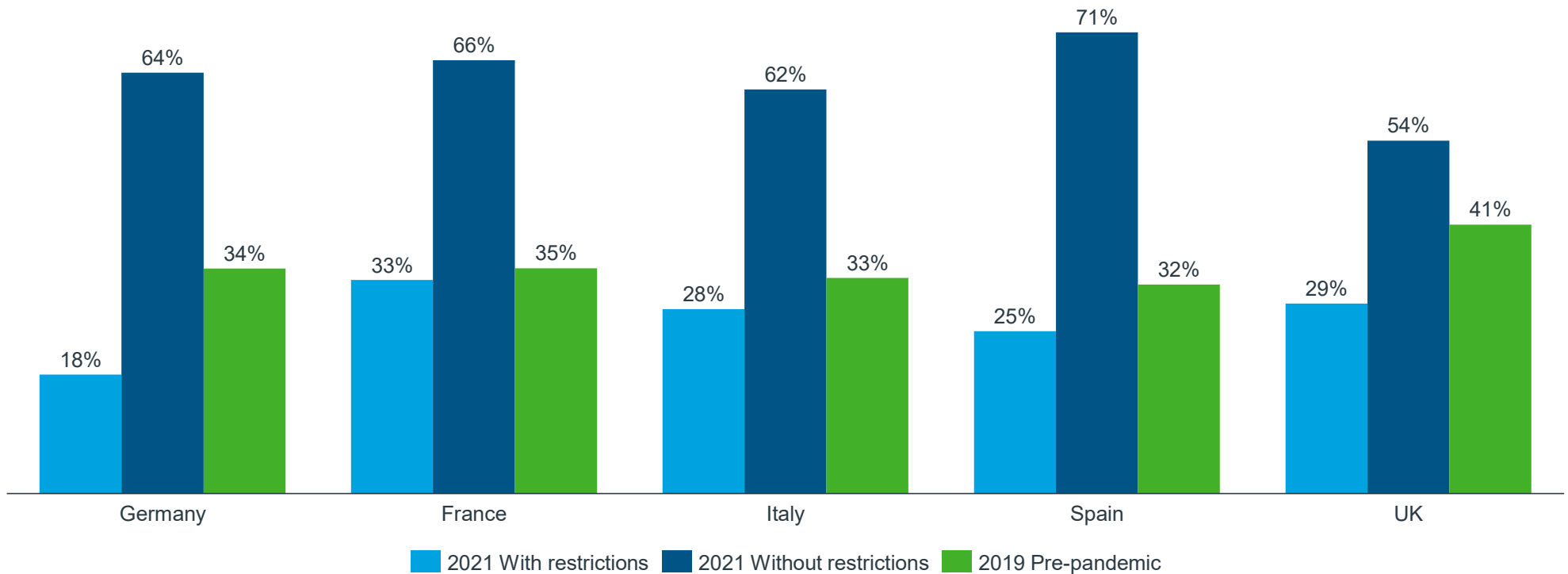
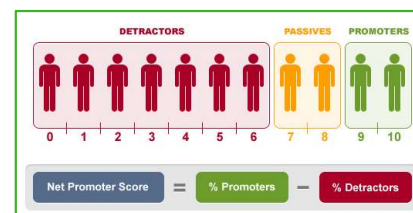Source: IQVIA ChannelDynamics Channel Preference Survey July 2021, 2020, 2019

In practice, HCP perception of interaction quality varies across channels and countries

NPS for live e-detailing is higher than for F2F in most of the EU4+UK

Channel Net Promoter Score (NPS) – Channel Recommendation MAT Q1 2021					
Traditional Channels	🇩🇪	🇫🇷	🇮🇹	🇪🇸	🇬🇧
• **F2F Detailing**	7%	8%	24%	27%	19%
• **Telephone Detailing**	11%	-16%	17%	12%	2%
• **F2F Meetings**	31%	37%	34%	40%	42%
Digital Channels					
• **Live e-detailing**	25%	22%	11%	36%	24%
• **Live e-meeting**	27%	34%	31%	30%	27%
• **Automated e-detailing**	-7%	-2%	-6%	-9%	-6%
• **Automated e-meetings**	-7%	35%	15%	1%	3%
• **E-mail**	-19%	-47%	-3%	-8%	-27%

IQVIA

Previous survey of HCPs in the EU4+UK showed more than half want research/support on diagnosis and treatment, on demand

Patient treatment support — **57%**

On-demand information — **56%**

Research on changes in patient diagnosis & treatment patterns — **51%**

Supporting disease screening — **34%**

Provide support in addressing backlog — **30%**

Research on impact of the pandemic on treatment practice — **26%**

Getting patient into the clinic — **13%**

Others — **2%**

(n=972), % of HCPs

MULTI-SELECT
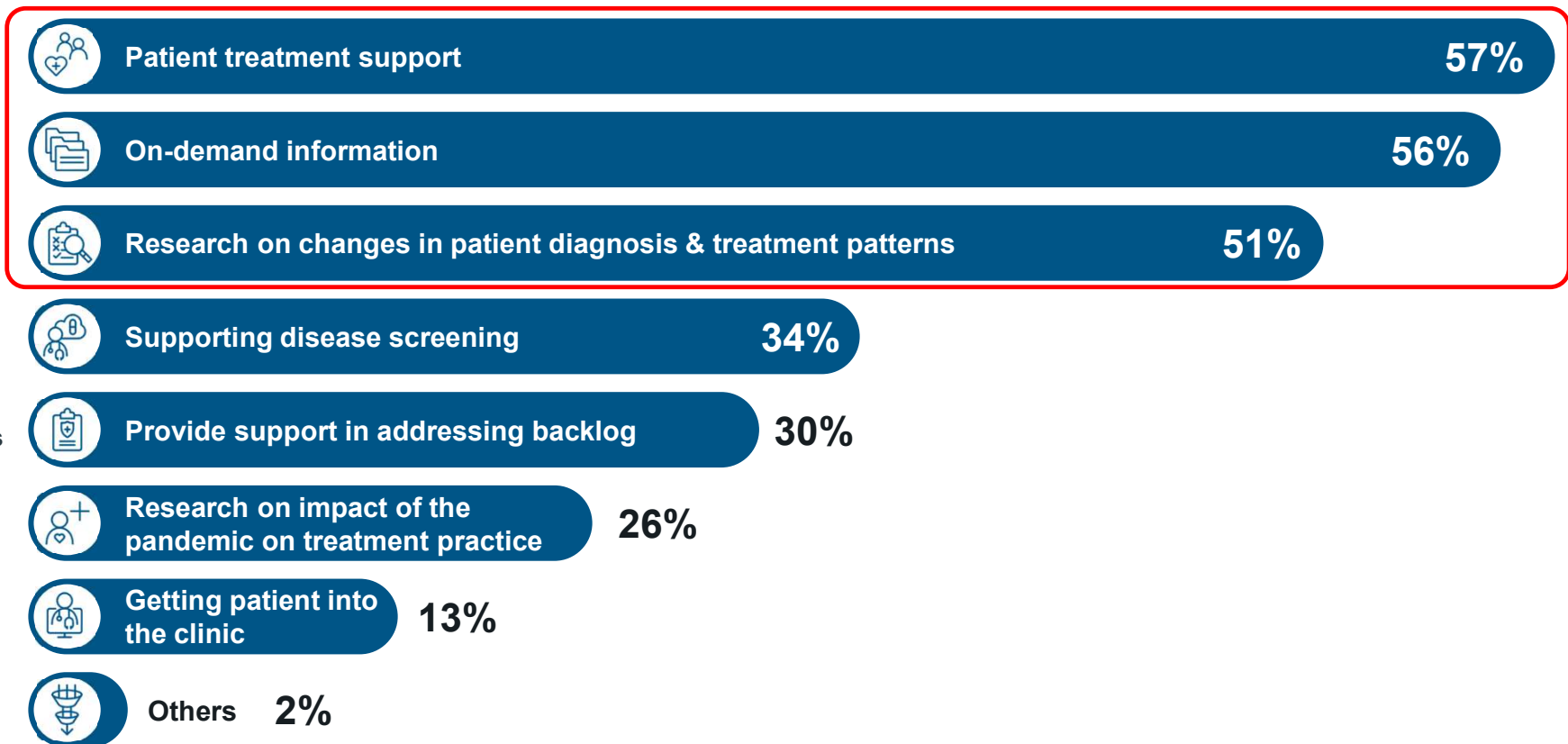
Q14. How do you expect pharmaceutical companies to support you in the introduction of an innovative launch in the future?
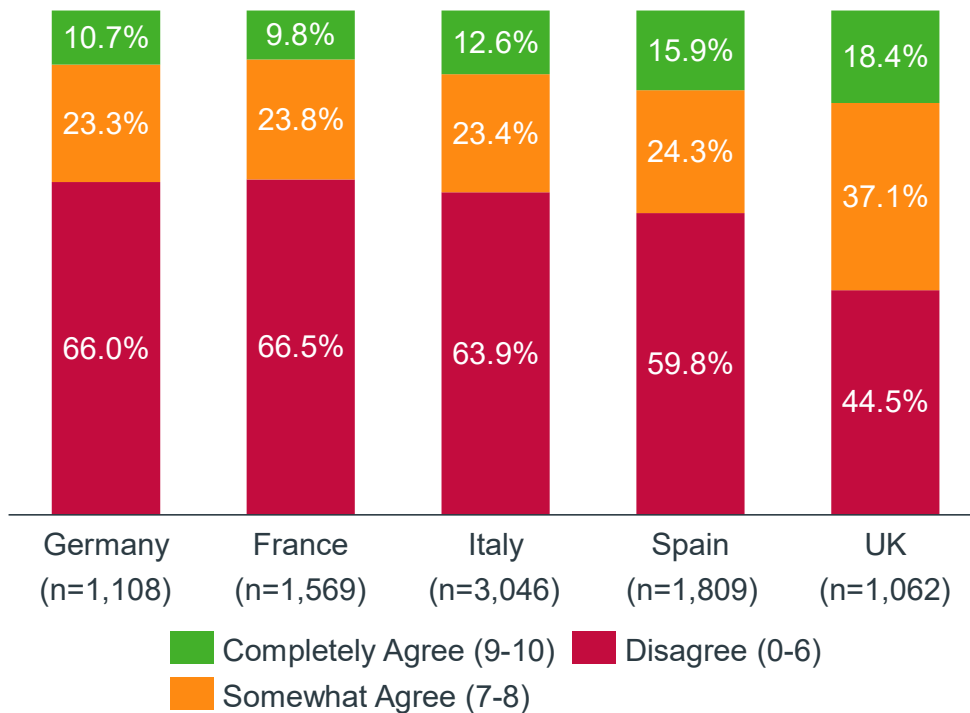
Looking forward, around one third of HCPs do believe that virtual rep interactions will be sufficient to meet their needs

In the UK it is over half

HCP satisfaction with virtual detailing (July 2021)

	Germany (n=1,108)	France (n=1,569)	Italy (n=3,046)	Spain (n=1,809)	UK (n=1,062)
Completely Agree (9-10)	10.7%	9.8%	12.6%	15.9%	18.4%
Somewhat Agree (7-8)	23.3%	23.8%	23.4%	24.3%	37.1%
Disagree (0-6)	66.0%	66.5%	63.9%	59.8%	44.5%

Legend:
- ■ (green) Completely Agree (9-10)
- ■ (red) Disagree (0-6)
- ■ (orange) Somewhat Agree (7-8)

Thinking about a **post-COVID-19 crisis** context, please indicate your level of agreement with the following statement:

"*Remote interactions with pharma representatives via online tools such as Skype, Zoom, Webex… will be sufficient in meeting my needs for up to date and relevant drug treatment information* "
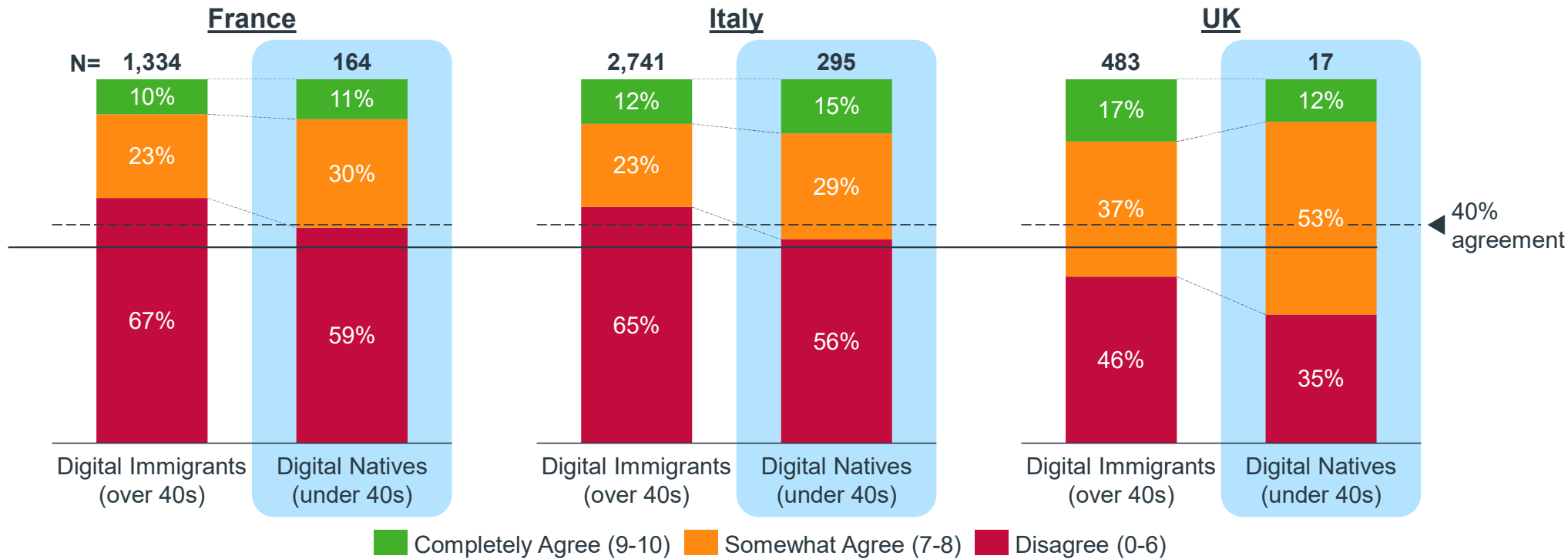
Scored 0-10

Younger HCPs tend to be more confident in virtual interactions

They are also the minority of respondents – most valuable customers currently in the older group

HCP Satisfaction with Virtual Detailing by Age Groups (July 2021)

France

	Digital Immigrants (over 40s)	Digital Natives (under 40s)
N=	1,334	164
Completely Agree	10%	11%
Somewhat Agree	23%	30%
Disagree	67%	59%

Italy

	Digital Immigrants (over 40s)	Digital Natives (under 40s)
N=	2,741	295
Completely Agree	12%	15%
Somewhat Agree	23%	29%
Disagree	65%	56%

UK

	Digital Immigrants (over 40s)	Digital Natives (under 40s)
N=	483	17
Completely Agree	17%	12%
Somewhat Agree	37%	53%
Disagree	46%	35%

40% agreement

Legend: ■ Completely Agree (9-10) ■ Somewhat Agree (7-8) ■ Disagree (0-6)

Source: IQVIA Channel Preference Survey July 2021
Note: in EU4+UK, there is insufficient data in post-1980 in Germany and Spain, hence not included

IQVIA

The promotional environment and HCP needs are becoming increasingly complex

Challenge of access to HCPs will remain

Even as formal restrictions lifted, volume of F2F did not return to pre-pandemic levels and interactive time is still down. This will likely continue to be the case as we continue to manage the third wave of infections & the Delta variant

Importance of on-demand when F2F is restricted

While F2F interactions are not possible, HCPs prefer to access information through emails and self-serve channels

Strong appetite for return to F2F

HCPs are keen to get back to normal with over 60% preferring F2F interactions when not restricted.
The rep relationship is still key

Virtual interactions sufficient for some

*Around one third of HCPs believe virtual calls can meet their needs in future. This proportion is **even higher among younger doctors***

Industry must balance complex customer needs, variation across countries, and opportunities for efficiencies

Impact of COVID-19 on the Pharmaceutical Market – EU4+UK

HCP's feedback on the ongoing health implications of COVID-19 long haulers across the EU4 & UK

Natalie Harb, Practice Leader, Performance Management

Our definition of COVID-19 long haulers and a note on HCP surveyed estimates of long haulers prevalence

COVID long haulers are recovered COVID-19 patients who are now suffering with other new conditions as a result of contracting COVID-19. These new conditions are also known as Long COVID, post-acute sequelae of SARS-CoV-2 infection, post-acute sequelae of COVID-19 (PASC), chronic COVID syndrome (CCS) and long-haul COVID.

Post-acute sequelae of COVID-19 (PASC) can affect nearly every organ system with sequelae including respiratory system disorders, nervous system and neurocognitive disorders, mental health disorders, metabolic disorders, cardiovascular disorders, gastrointestinal disorders, malaise, fatigue, musculoskeletal pain, and anemia

The prevalence of COVID long haulers is still being studied, and estimates, dependent on the specific definition of COVID long haulers and the study instrument used, are currently quite variable. New research findings are being regularly published from a range of sources. ***The estimates provided in this research are based on surveyed Healthcare Professional respondents' reports.***

Couple of things to highlight …

1   Sample sizes are not representative at country level. In addition, the sample composition is slightly different at the country level. This could lead to some of the difference noted at country level

2   This was a pulse survey. The questions asked are intended to provide top level insight into what HCP's across the EU4 & UK are experiencing

3   Estimates of prevalence (i.e., % of people that are now defined as long haulers) vary a lot between different studies conducted worldwide. For eg: In the UK, ONS survey found that 1 in 40 COVID-19 patients is now defined as a long hauler (by the definition used for the ONS survey)

4   The data shown throughtout this presentation represent HCP's views from the research conducted for the purpose of this presentation. IQVIA undertakes no obligation to update them, whether as a result of new information, future events or otherwise

We interviewed ~700 HCPs, across a mix of specialties to understand the ongoing health implications of COVID-19 long haulers
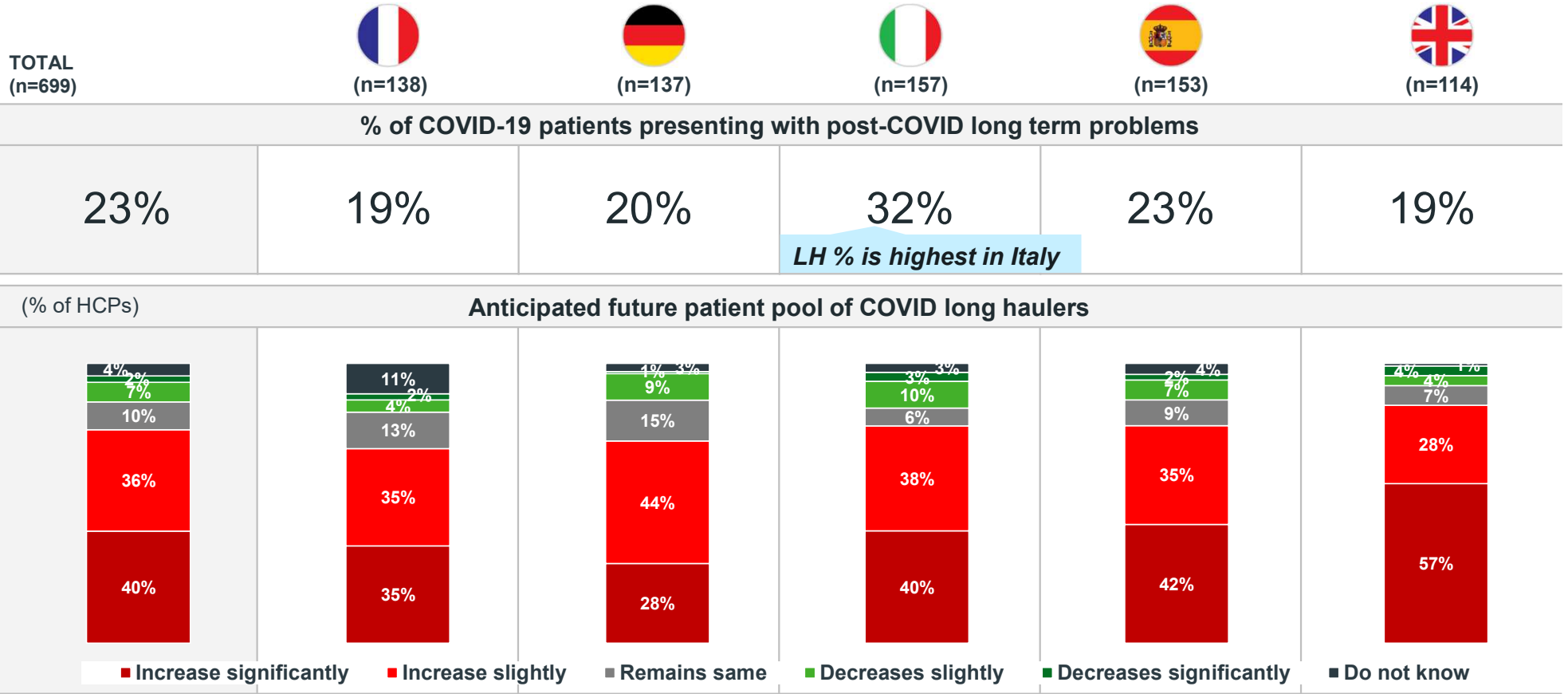
Sample Split

LOI: 8min quantitative surveys
Time period: mid-August – mid-September

		France (n=138)	Germany (n=137)	Italy (n=157)	Spain (n=153)	UK (n=114)
General Practitioner	**23**%	25%	23%	20%	20%	27%
Cardiologist	**14**%	16%	17%	13%	14%	11%
Pulmonologist	**11**%	13%	12%	10%	10%	13%
Neurologist	**12**%	13%	14%	13%	13%	7%
Psychiatrist	**15**%	15%	15%	15%	14%	16%
Nephrologist	**9**%	8%	12%	10%	10%	7%
Endo/Diab	**11**%	7%	5%	13%	13%	18%
Pediatrician	**4**%	3%	4%	6%	7%	1%
(n=699)						

S1. What is your primary medical specialty?
Source: IQVIA Primary Market Research

EU4 & UK COVID-19 Quarterly Webinar: HCP's feedback on the ongoing health implications of COVID-19 long haulers across the EU4 & UK

IQVIA   17

HCPs interviewed reported 1 in 5 COVID-19 patients as long haulers; a significant proportion anticipate this number to increase in next 6 months

TOTAL (n=699)	🇫🇷 (n=138)	🇩🇪 (n=137)	🇮🇹 (n=157)	🇪🇸 (n=153)	🇬🇧 (n=114)
% of COVID-19 patients presenting with post-COVID long term problems					
23%	19%	20%	32%	23%	19%
			LH % is highest in Italy		

(% of HCPs) — Anticipated future patient pool of COVID long haulers

	TOTAL	France	Germany	Italy	Spain	UK
Do not know	4%	11%	1%	3%	2%	4%
Decreases significantly	2%	2%	3%	3%	4%	1%
Decreases slightly	7%	4%	9%	3%	7%	4%
Remains same	10%	13%	15%	6%	9%	7%
Increase slightly	36%	35%	44%	38%	35%	28%
Increase significantly	40%	35%	28%	40%	42%	57%

■ **Increase significantly**   ■ **Increase slightly**   ■ **Remains same**   ■ **Decreases slightly**   ■ **Decreases significantly**   ■ **Do not know**

3.In your opinion, what proportion of COVID-affected patients present with post-COVID long-term problems? 14.Thinking about the future, how do you think the patient pool of COVID long haulers will look like in next 6 months?
Source: IQVIA Primary Market Research

According to HCPs, severity of COVID infection has no relation to long hauler status; most long haulers experience a mild long COVID condition

TOTAL
(n=699) (% of patients)

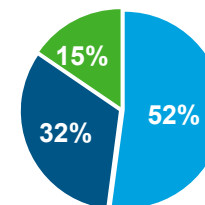**(n=138)**   **(n=137)**   **(n=157)**   **(n=153)**   **(n=114)**

Split of long haulers by severity of their COVID-19 infection

Total	France	Germany	Italy	Spain	UK
32% / 35% / 34%	32% / 37% / 33%	34% / 36% / 32%	33% / 32% / 36%	31% / 34% / 35%	33% / 37% / 31%
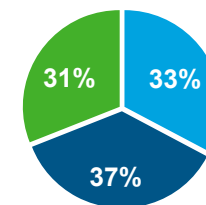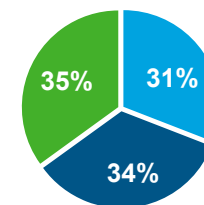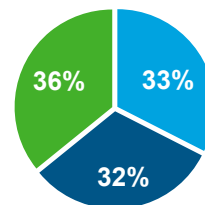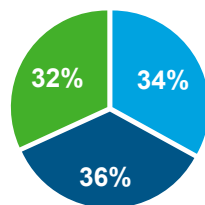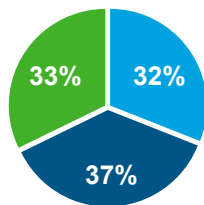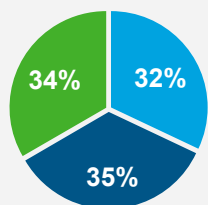
Split of long haulers by severity of their long COVID condition

■ Mild   ■ Moderate   ■ Severe

Total	France	Germany	Italy	Spain	UK
47% / 35% / 19%	47% / 34% / 20%	46% / 35% / 20%	52% / 32% / 15%	48% / 34% / 19%	42% / 38% / 22%
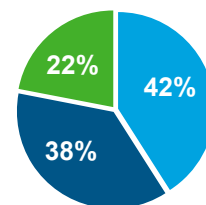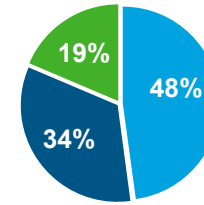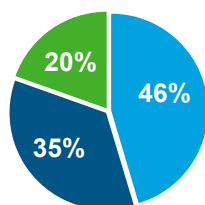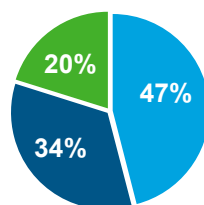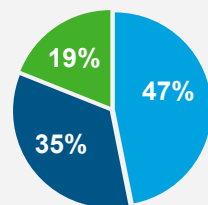
4. Thinking about the COVID long hauler patient segment, please split them by severity of COVID-19 infection.
5. In your best estimates, please split the COVID long hauler patient population by the level of severity of their long-term problems.
Source: IQVIA Primary Market Research

COVID-19 Long Hauler Severity:
Mild severity: *Defined as sufficiently significant to seek medical help for, but not impeding day to day activities*
Moderate severity: *Defined as impeding but not entirely preventing day to day activities*
High severity: *Defined as life altering, completely preventing day to day activities and normal function*
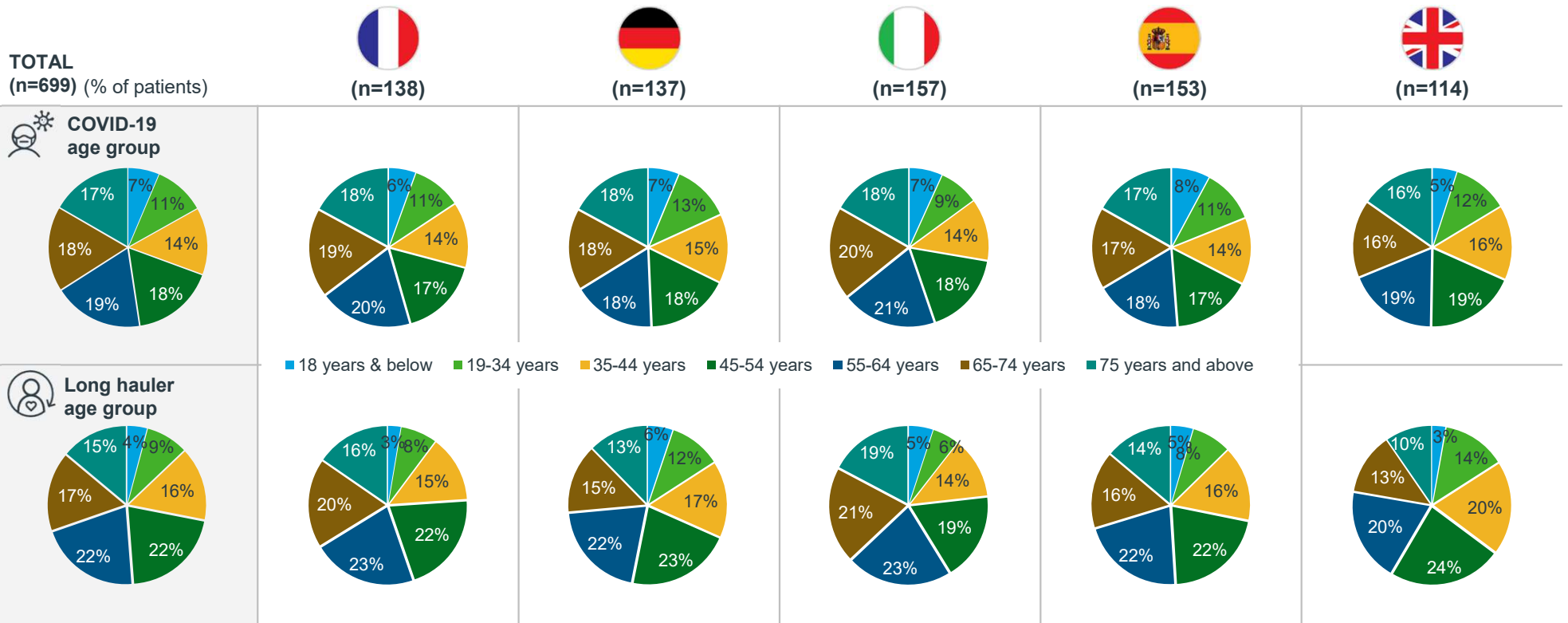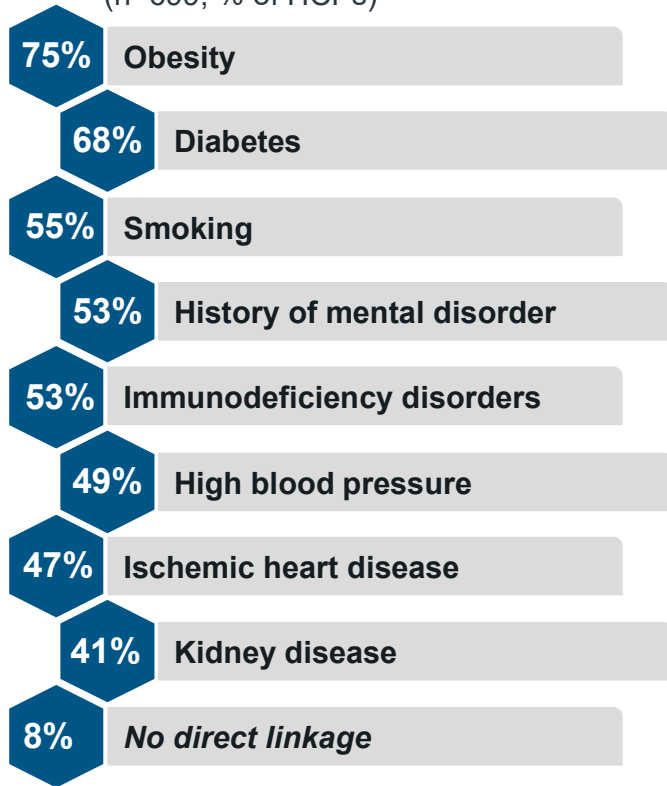
EU4 & UK COVID-19 Quarterly Webinar: HCP's feedback on the ongoing health implications of COVID-19 long haulers across the EU4 & UK

IQVIA   19

HCPs reported most of COVID-19 patients are male; however, they said long haulers were predominantly female

	TOTAL (n=699) (% of patients)	🇫🇷 (n=138)	🇩🇪 (n=137)	🇮🇹 (n=157)	🇪🇸 (n=153)	🇬🇧 (n=114)
COVID-19 patient gender	47% / 53%	47% / 53%	47% / 53%	46% / 54%	48% / 52%	47% / 53%
Long hauler gender	54% / 46%	54% / 46%	56% / 44%	47% / 53%	59% / 41%	58% / 42%
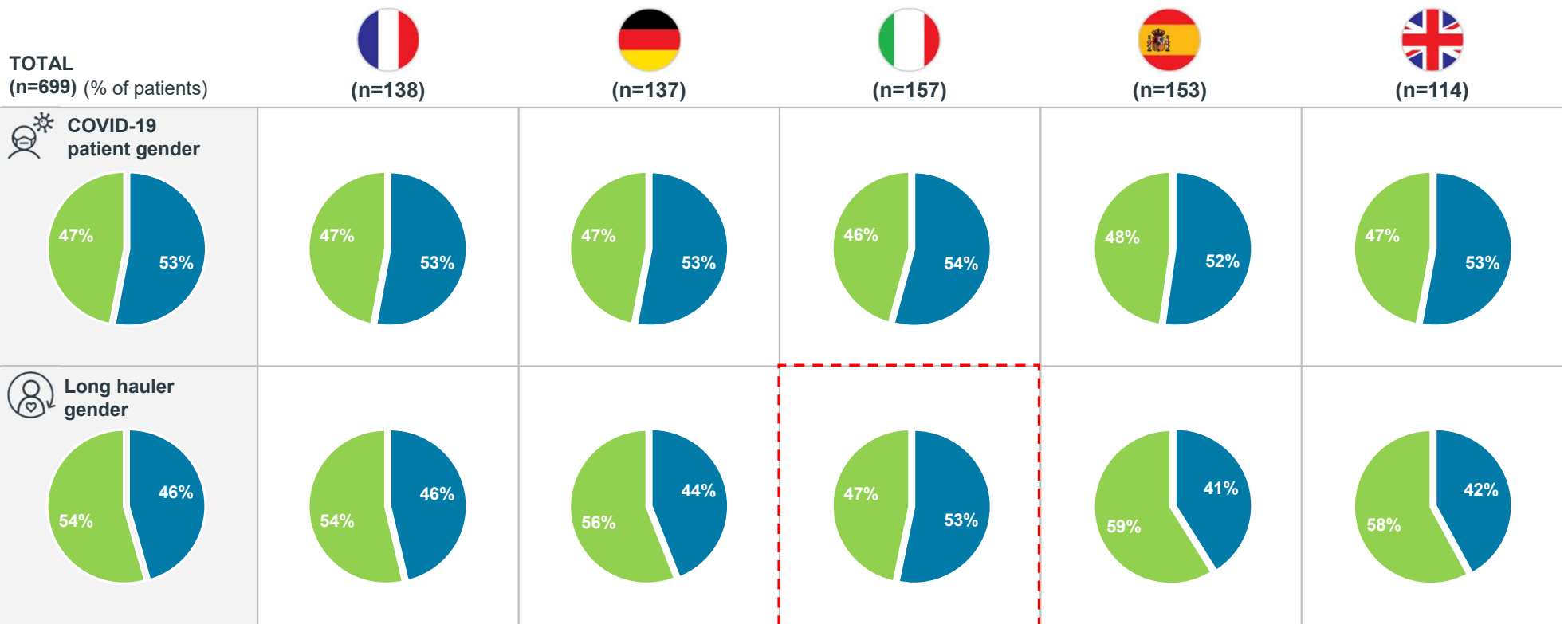
6. Please split the your COVID-affected and COVID long hauler patient population by gender
Source: IQVIA Primary Market Research

♂ Male   ♀ Female

EU4 & UK COVID-19 Quarterly Webinar: HCP's feedback on the ongoing health implications of COVID-19 long haulers across the EU4 & UK

IQVIA   20

HCPs reported COVID-19 patients and long haulers have similar distribution of age group

TOTAL (n=699) (% of patients)

France **(n=138)** · Germany **(n=137)** · Italy **(n=157)** · Spain **(n=153)** · UK **(n=114)**

COVID-19 age group — pie charts

Total: 7%, 11%, 14%, 18%, 19%, 18%, 17%
France: 6%, 11%, 14%, 17%, 20%, 19%, 18%
Germany: 7%, 13%, 15%, 18%, 18%, 18%
Italy: 7%, 9%, 14%, 18%, 21%, 20%, 18%
Spain: 8%, 11%, 14%, 17%, 18%, 17%, 17%
UK: 5%, 12%, 16%, 19%, 19%, 16%, 16%

Legend: ■ 18 years & below ■ 19-34 years ■ 35-44 years ■ 45-54 years ■ 55-64 years ■ 65-74 years ■ 75 years and above

Long hauler age group — pie charts

Total: 4%, 9%, 16%, 22%, 22%, 17%, 15%
France: 3%, 8%, 15%, 22%, 23%, 20%, 16%
Germany: 6%, 12%, 17%, 23%, 22%, 15%, 13%
Italy: 5%, 6%, 14%, 19%, 23%, 21%, 19%
Spain: 5%, 8%, 16%, 22%, 22%, 16%, 14%
UK: 3%, 14%, 20%, 24%, 20%, 13%, 10%

7. Please split the your COVID-affected and COVID long hauler patient population across below age groups
Source: IQVIA Primary Market Research

EU4 & UK COVID-19 Quarterly Webinar: HCP's feedback on the ongoing health implications of COVID-19 long haulers across the EU4 & UK

IQVIA   21

HCPs identified obesity & diabetes as key risk factors for long haulers

Risk factors
(n=699, % of HCPs)

Risk factor	🇫🇷 n=138	🇩🇪 n=137	🇮🇹 n=157	🇪🇸 n=153	🇬🇧 n=114
75% Obesity	80%	74%	73%	74%	75%
68% Diabetes	73%	58%	72%	62%	73%
55% Smoking	46%	65%	54%	56%	54%
53% History of mental disorder	44%	62%	46%	49%	69%
53% Immunodeficiency disorders	55%	61%	49%	46%	54%
49% High blood pressure	58%	54%	48%	46%	39%
47% Ischemic heart disease	48%	37%	58%	40%	51%
41% Kidney disease	45%	39%	39%	36%	51%
8% *No direct linkage*	11%	9%	3%	8%	8%

Other risk factors include: Respiratory pathologies, Autoimmune disease, Psychiatric disorders, Vasculitis;
9.In your opinion, what are the risk factors for long haulers?

Italian physicians associate long haulers with some or other risk factor

EU4 & UK COVID-19 Quarterly Webinar: HCP's feedback on the ongoing health implications of COVID-19 long haulers across the EU4 & UK

IQVIA   22

HCPs reported Respiratory as the most prevalent long hauler condition

Conditions of long haulers
(% of patients)

	🇫🇷 (n=138)	🇩🇪 (n=137)	🇮🇹 (n=157)	🇪🇸 (n=153)	🇬🇧 (n=114)
35% Respiratory	38%	35%	34%	34%	34%
21% Neurological	22%	24%	19%	22%	19%
20% Behavioral	21%	17%	21%	20%	19%
16% Cardiovascular	15%	16%	17%	15%	16%
8% Nephrological	9%	9%	7%	8%	9%
18% Others*	16%	20%	22%	15%	16%

*Others include fatigue, musculoskeletal, dermatological, rheumatological, gastroenterological, psychiatric, myalgia, etc.
8.Please split the COVID long hauler patient population across following categories of new/worsened conditions arising due to COVID

EU4 & UK COVID-19 Quarterly Webinar: HCP's feedback on the ongoing health implications of COVID-19 long haulers across the EU4 & UK

IQVIA   23

HCPs reported fatigue and shortness of breath as the top 2 symptoms that long haulers presented

Symptoms' presentation

(n=699, % of HCPs)

	Fatigue	Shortness of breath	Depression & Anxiety	Memory & concentration prob	Brain fog	
	77%	**57%**	**50%**	**48%**	**37%**	
🇫🇷 **n=138**	81%	64%	46%	36%	27%	Headache 35%
🇩🇪 **n=137**	76%	69%	55%	61%	36%	Headache 37%
🇮🇹 **n=157**	69%	43%	50%	37%	32%	
🇪🇸 **n=153**	80%	46%	48%	57%	42%	Headache 44%
🇬🇧 **n=114**	76%	64%	53%	50%	54%	

10.What are the top 5 common symptoms/conditions presented/complained by long haulers?

The call-outs represent other major symptoms in particular countries

EU4 & UK COVID-19 Quarterly Webinar: HCP's feedback on the ongoing health implications of COVID-19 long haulers across the EU4 & UK

IQVIA   24

According to HCPs, physical examinations & sign/symptoms are the top 2 ways of confirming diagnosis of long haulers
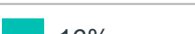
Diagnostic tests for long haulers

(n=699, % of HCPs)	Total	🇫🇷 n=138	🇩🇪 n=137	🇮🇹 n=157	🇪🇸 n=153	🇬🇧 n=114
Physical examination	83%	76%	91%	82%	82%	87%
Sign/symptoms	78%	67%	80%	71%	90%	82%
ECG, Chest X-ray, or CT Scan	71%	67%	71%	64%	73%	83%
Complete blood picture	70%	72%	74%	64%	67%	78%
C-reactive protein for inflammation level	64%	61%	66%	59%	60%	78%
Kidney function test	54%	46%	51%	44%	59%	72%
Liver function test	46%	36%	36%	35%	54%	75%
D-dimer test	40%	30%	36%	45%	48%	40%
Complete urine examination	36%	22%	50%	32%	34%	45%
Others*	10%	5%	14%	11%	10%	13%

Others include Echocardiogram, Spirometry, Pulmonary function testing, Brain MRI, Electromyography, Chest radiograph, Natriuretic Peptide Tests (BNP), Stress test with oxygen consumption, Ergometry, Psychiatric assessment, Electroencephalography, HbA1C etc.; 11.Please specify the tests and examinations you undertake to confirm diagnosis of COVID long hauler

EU4 & UK COVID-19 Quarterly Webinar: HCP's feedback on the ongoing health implications of COVID-19 long haulers across the EU4 & UK

IQVIA

25

HCPs report the variety of symptoms, lack of standard definition and specific treatments are the major challenges in long haulers management

Challenges in management of long haulers

(n=699, % of HCPs)	Total	🇫🇷 n=138	🇩🇪 n=137	🇮🇹 n=157	🇪🇸 n=153	🇬🇧 n=114
Wide variability of symptoms	77%	83%	81%	60%	76%	91%
No specific treatment for long haulers	73%	75%	72%	61%	82%	77%
Lack of any standardized definition to classify patients into long hauler segment	72%	67%	66%	73%	81%	73%
Multiple manifestations appearing together	56%	53%	46%	50%	57%	79%
Lack of proper treatment to manage different manifestations	51%	51%	53%	44%	54%	54%
Long treatment process	44%	40%	55%	39%	43%	46%
Emergence of newer health problems	37%	39%	24%	33%	46%	41%
Patients' compliance to treatment	16%	16%	18%	15%	16%	18%
Others	1%	1%	1%	-	1%	4%

12.What are the major challenges you face in the management of long hauler symptoms?

EU4 & UK COVID-19 Quarterly Webinar: HCP's feedback on the ongoing health implications of COVID-19 long haulers across the EU4 & UK

IQVIA   26

Support Required from Pharmaceutical Industry
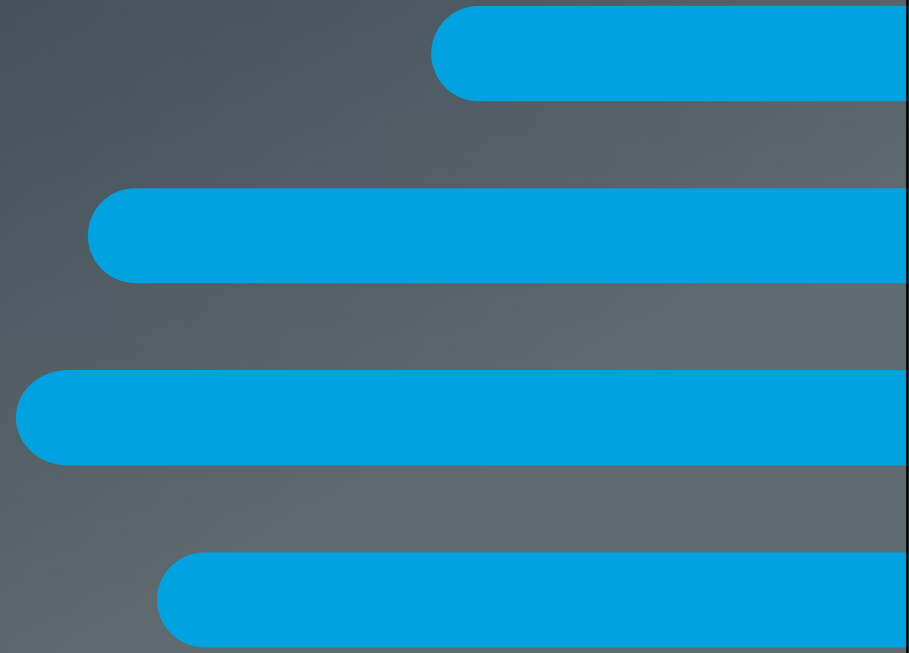
HCPs want support in developing tests and treatment guidelines for long haulers; in FR, IT, & the UK post COVID-19 centers are also desired
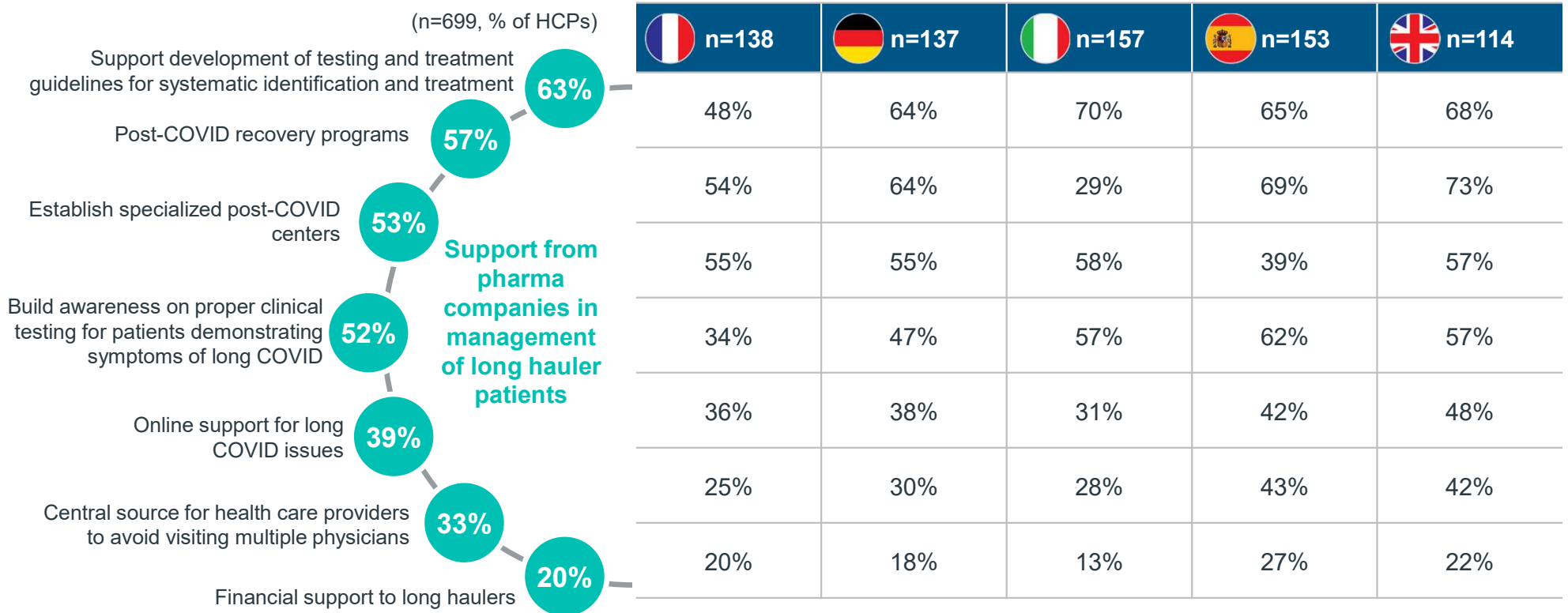
(n=699, % of HCPs)

	🇫🇷 n=138	🇩🇪 n=137	🇮🇹 n=157	🇪🇸 n=153	🇬🇧 n=114
63% Support development of testing and treatment guidelines for systematic identification and treatment	48%	64%	70%	65%	68%
57% Post-COVID recovery programs	54%	64%	29%	69%	73%
53% Establish specialized post-COVID centers	55%	55%	58%	39%	57%
52% Build awareness on proper clinical testing for patients demonstrating symptoms of long COVID	34%	47%	57%	62%	57%
39% Online support for long COVID issues	36%	38%	31%	42%	48%
33% Central source for health care providers to avoid visiting multiple physicians	25%	30%	28%	43%	42%
20% Financial support to long haulers	20%	18%	13%	27%	22%

Support from pharma companies in management of long hauler patients

15.What support do you need from the pharmaceutical companies to help in management of COVID long haulers?

EU4 & UK COVID-19 Quarterly Webinar: HCP's feedback on the ongoing health implications of COVID-19 long haulers across the EU4 & UK

≡IQVIA   28

HCPs report they want clinical trials & RWE for evaluating COVID long hauler treatments

Research Support from pharma companies
(% of HCPs)

	🇫🇷 n=138	🇩🇪 n=137	🇮🇹 n=157	🇪🇸 n=153	🇬🇧 n=114
77% Clinical trials evaluating treatments specific for COVID long haulers	73%	82%	75%	76%	77%
67% Research and real-world evidence characterizing long COVID patients	67%	69%	61%	62%	77%
53% Research on impact of long COVID on treatment of their non COVID-19 conditions	51%	50%	48%	55%	62%
45% Research on interplay between pre-existing conditions and development of new long hauler conditions	38%	50%	39%	53%	48%

16.What kind of research support do you anticipate from the pharma companies for management of COVID long haulers?

EU4 & UK COVID-19 Quarterly Webinar: HCP's feedback on the ongoing health implications of COVID-19 long haulers across the EU4 & UK
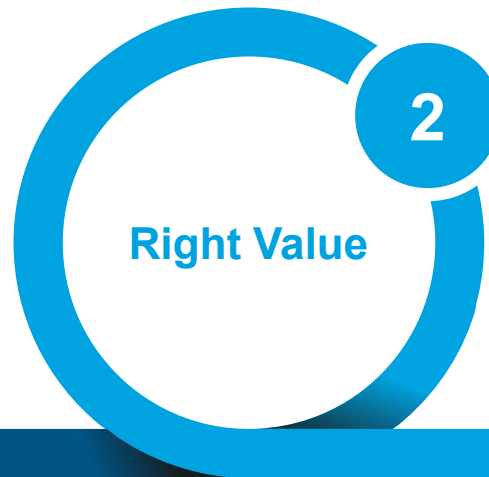
IQVIA   29

Agenda

+ COVID-19's Impact on HCP's Channel Preferences

+ HCP's Feedback on the Ongoing Health Implications of COVID-19 Long Haulers Across the EU4 & UK

+ **Closing Remarks**

+ Q&A

Managing the complexity means a Connected Intelligence approach

Winning customer strategies must address…

1 Right Customer

2 Right Value

3 Right Orchestration

Segmentation

- Understanding individual customer channel preference and behaviour
- Enable differentiated segment strategies

Individualised Experience

- HCPs value individualised & personal interactions – importance of relationship
- Easily accessible & relevant on-demand materials
- Future customer more open to digital channels & new way working

Intelligent Hybrid Model

- All channels must be viable and deliver value
- AI/ML to understand & track all promotional touchpoints
- Challenging mindsets on what customers want vs. commercial realities

With the evolving nature and size of long haulers, there is much that the pharmaceutical industry can do to support effective management

What HCPs reported in this survey

How can industry support?

One in Four patients with COVID-19 infection present to them as long haulers, with half of them having mild condition. They expect this number to **increase over next 6 months**

Majority of the long haulers are **female.** However, the long COVID condition is **not** restricted to any **specific age group.**

Patients present with **variable symptoms** (respiratory, neurological and behavioral being most frequent) and **multitude of tests** are undertaken to confirm diagnosis

HCPs report the **variety of symptoms, lack of standard definition and specific treatments** are the major challenges in long haulers management

With the gaps in current management, there are multiple areas where physicians and HCPs seek support from industry:
- Development of testing and treatment guidelines for systematic identification and treatment
- Clinical trials evaluating treatments specific for COVID long haulers
- Research and real-world evidence characterizing long COVID patients

IQVIA

Q&A

Sarah Rickwood

Vice President

EMEA Thought Leadership and Marketing

Natalie Harb

Senior Principal

Global Consulting & Analytics Solutions

Look out for our latest white papers…

- **Launch Excellence: Escaping the Complexity Trap**

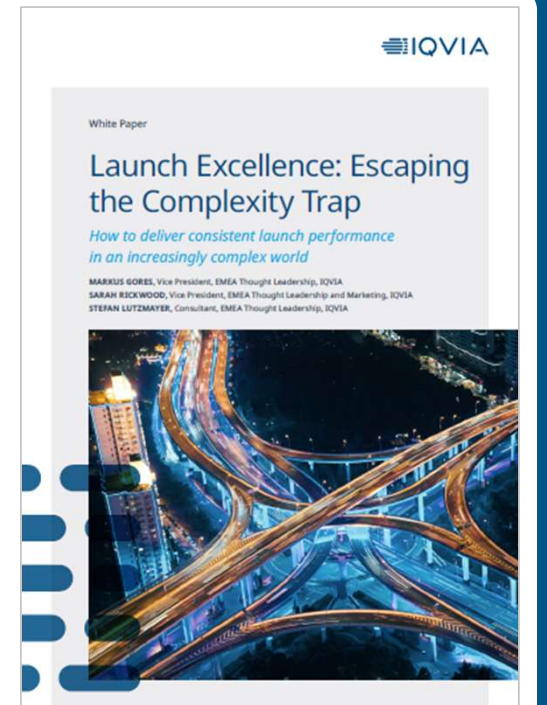 *How to deliver consistent launch performance in an increasingly complex world*

  Download your copy here:

  https://www.iqvia.com/en/library/white-papers/launch-excellence-escaping-the-complexity-trap

- **Launch Excellence VII: Three Pillars of post-Pandemic Launch Excellence**

  Available here:

  https://www.iqvia.com/library/white-papers/launch-excellence-vii

IQVIA

Thank you

Please connect with following in case any further information is needed:

- Natalie Harb, Practice Leader – Performance Management (natalie.harb@it.imshealth.com)

- Sarah Rickwood, VP, Thought Leadership EMEA (srickwood@uk.imshealth.com)

IQVIA