

COVID-19: VACCINES, THERAPEUTICS & TREATMENT IMPACT

Perspectives from Ipsos' syndicated COVID-19 study portfolio



DRIVERS / BARRIERS TO COVID-19 VACCINATION

Overall, more than **70%** of consumers in our study agreed it was their **“social responsibility”** to get a COVID-19 vaccine.



“I am worried about the long-term side effects with vaccines”

...was the top reason given by unvaccinated respondents in EU4, UK & US.

Source: Ipsos Syndicated Vaccine Impact Study (August 2021, sampled consumers in UK (n=1502), EU4 (n=6020), US (n=2001) & Brazil (n=1000) providing perceptual information online.

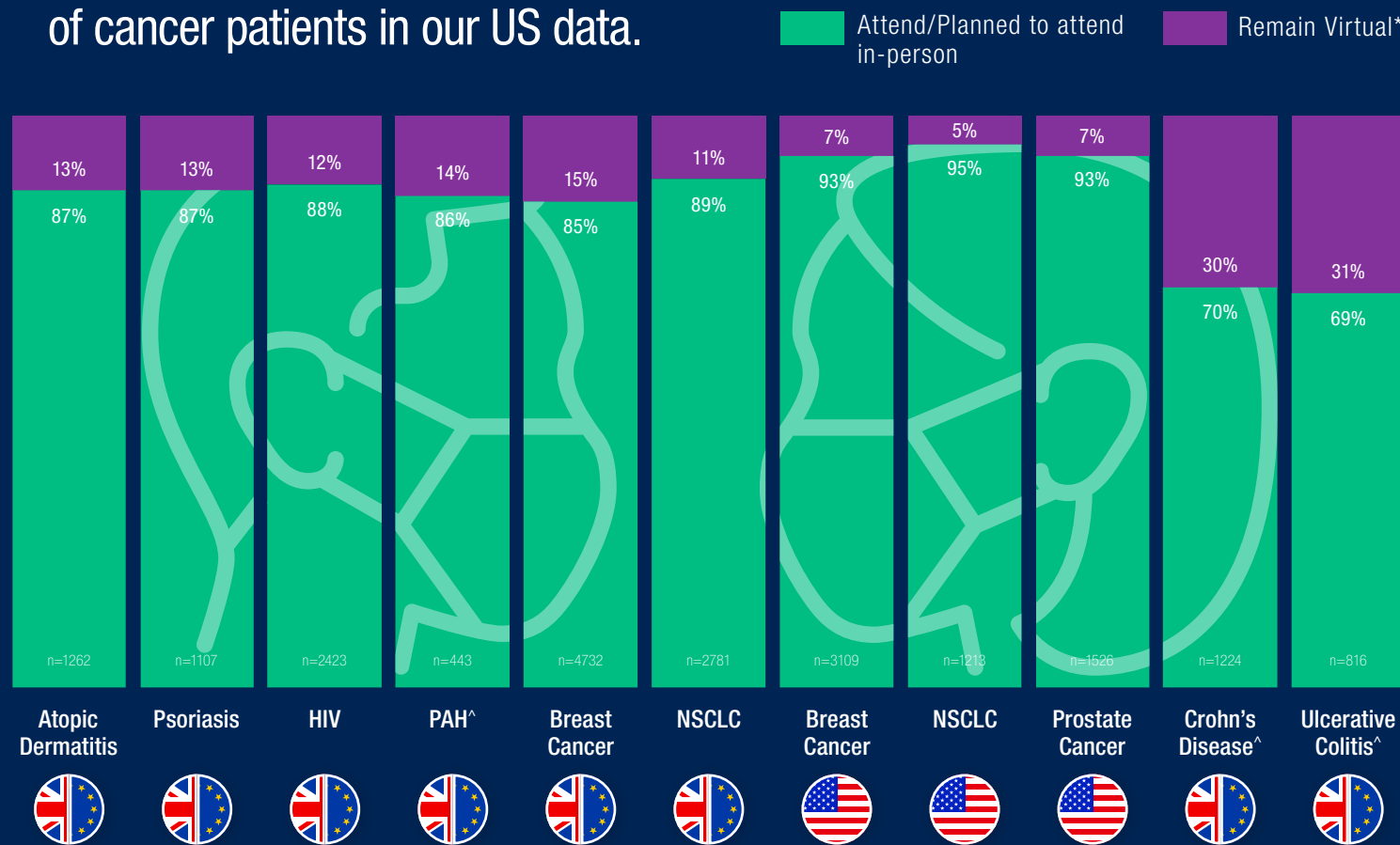
Source: Ipsos Syndicated Vaccine Impact Study (August 2021, 1,672 unvaccinated consumers in UK, EU4 & US providing perceptual information online). Data © Ipsos 2021, all rights reserved.



RETURN TO IN-PERSON CONSULTATIONS

The shift back to in-person consultations has been faster in some therapy areas than others...

- Around 85-90% of reported patients with AD, PsO, HIV, PAH, and some cancers are now seen in person in EU4/UK – along with 90% of cancer patients in our US data.
- The return to face-to-face has been slower for reported IBD patients in Europe.



Source: Ipsos Cross-Therapy Area COVID-19 Impact Study (analysis of patient chart audit data collected by physicians participating in Ipsos Global Therapy Monitors in Q1 & Q2 2021). Data collected online. Participating physicians were primary treaters and saw a minimum number of patients per month. Data © Ipsos 2021, all rights reserved.

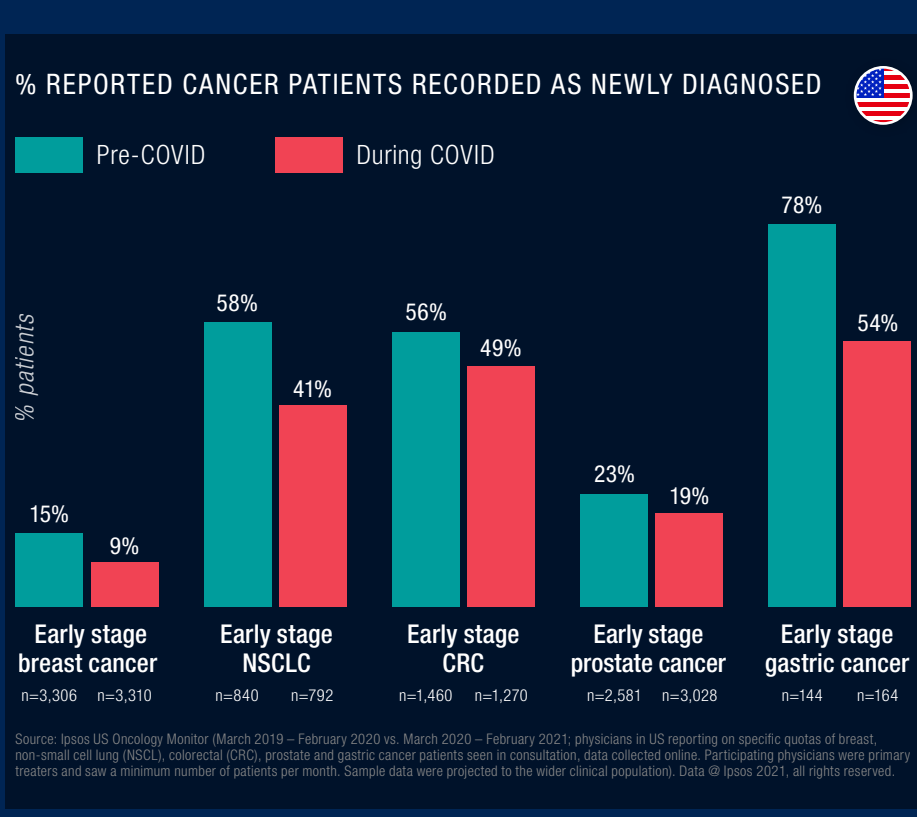
* Virtual: Phone call/ Telemedicine platform/ Internet
^ All data taken from Q2 2021 TMs, apart from IBD, PAH where Q1 2021 data is available



IMPACT ON DISEASE DIAGNOSIS

Physicians participating in Ipsos' US Oncology Monitor reported **FEWER** newly diagnosed cancer patients in Mar '20 – Feb '21 ('during COVID') than in Mar '19 – Feb '20 ('pre-COVID').

US Therapy Monitor data suggest similar trends in the diagnosis of severe asthma, RA, HIV and MS.



Source: Ipsos US Oncology Monitor (March 2019 – February 2020 vs. March 2020 – February 2021, physicians in US reporting on specific quotas of breast, non-small cell lung (NSCLC), colorectal (CRC), prostate and gastric cancer patients seen in consultation, data collected online). Participating physicians were primary treaters and saw a minimum number of patients per month. Sample data were projected to the wider clinical population. Data © Ipsos 2021, all rights reserved.



AWARENESS OF COVID-19 THERAPEUTICS

Of the regions surveyed, awareness of prescribed treatments for COVID-19 was lowest in Germany and the UK, and highest in Brazil.



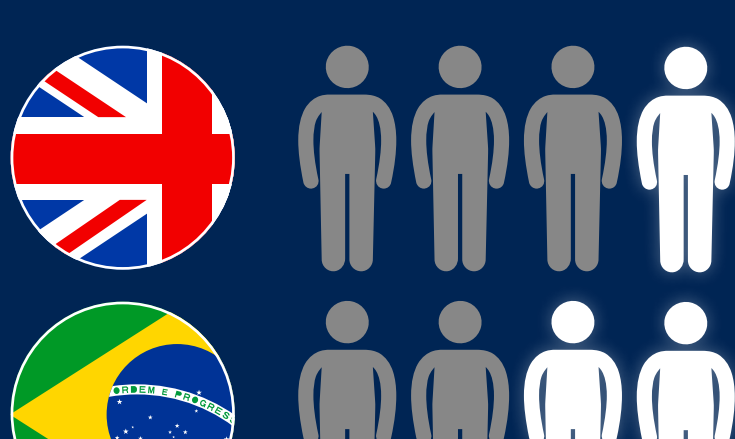
Source: Ipsos Syndicated Consumer Therapeutics Study (July 2021, sampled consumers in UK (n=1502), EU4 (n=6009), US (n=2000) & Brazil (n=1010) providing perceptual information online). Data © Ipsos 2021, all rights reserved.

Italian respondents were the most likely to consider prescribed COVID-19 treatments as important as vaccines in the fight against COVID-19.



Source: Ipsos Syndicated Consumer Therapeutics Study (July 2021, sampled consumers in UK (n=1502), EU4 (n=6009), US (n=2000) & Brazil (n=1010) providing perceptual information online). Data © Ipsos 2021, all rights reserved.

Following a positive test for COVID-19, only one in four sampled UK consumers would ask their doctor right away for a prescription treatment to prevent severe disease – as opposed to half of those in Brazil.



Source: Ipsos Syndicated Consumer Therapeutics Study (July 2021, sampled consumers in UK (n=1502), EU4 (n=6009), US (n=2000) & Brazil (n=1010) providing perceptual information online). Data © Ipsos 2021, all rights reserved.



WILLINGNESS TO TAKE COVID-19 THERAPEUTICS

Of the non-hospitalised patients in our study that stood to benefit from newer COVID-19 treatments, only **42%** were willing to take a new treatment.



Source: Ipsos COVID-19 Therapy Monitor (July–August 2021, 145 physicians in US, EU4, and UK providing real-world data on patients seen in consultation, along with perceptual information; data collected online). Participating doctors were primary treaters and saw a minimum number of patients per month. Data © Ipsos 2021, all rights reserved.

Contact us to discover evolving perceptions and ongoing real-world impacts of COVID-19: Ramya.Logendra@ipsos.com

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