

# US Cough, Cold and Flu 2021/22 - Navigating the Unknown

*November 4<sup>th</sup> 2021*

# Speakers



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**Cough/Cold/Flu  
Global Sales  
Snapshot**

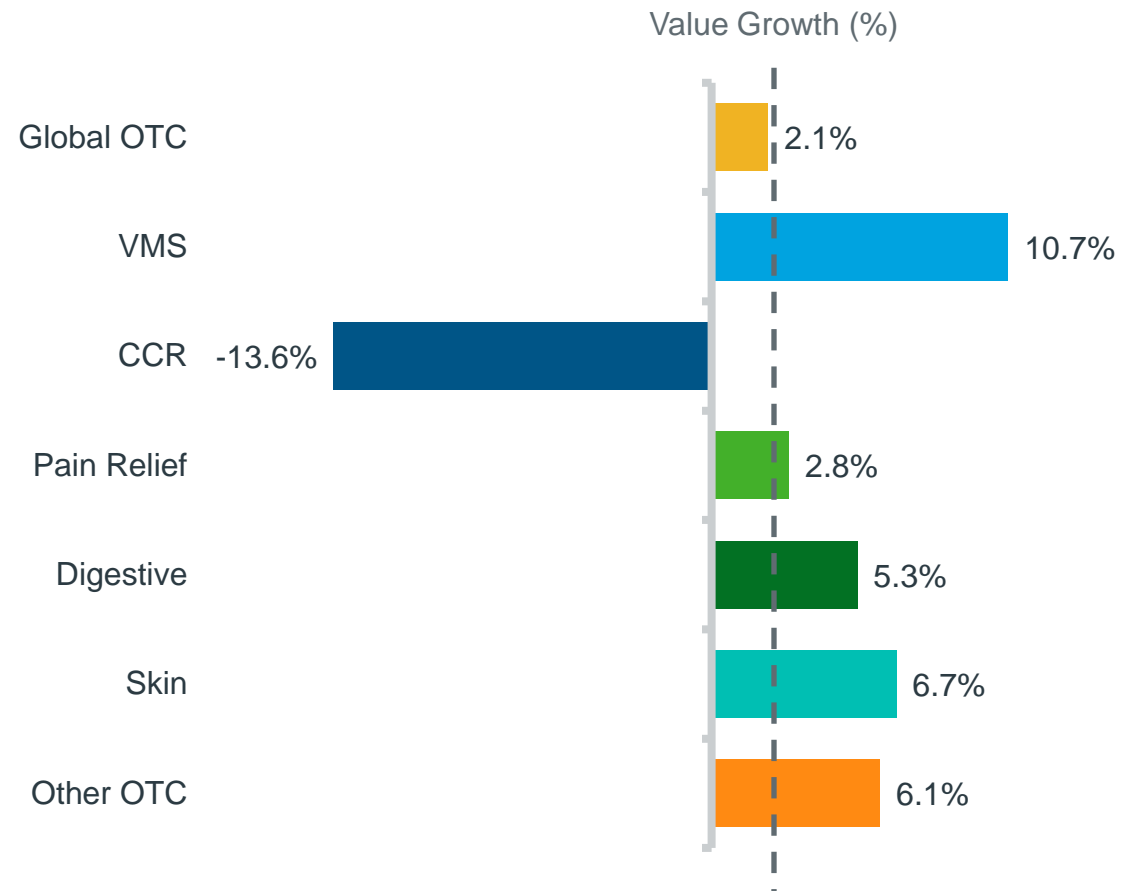
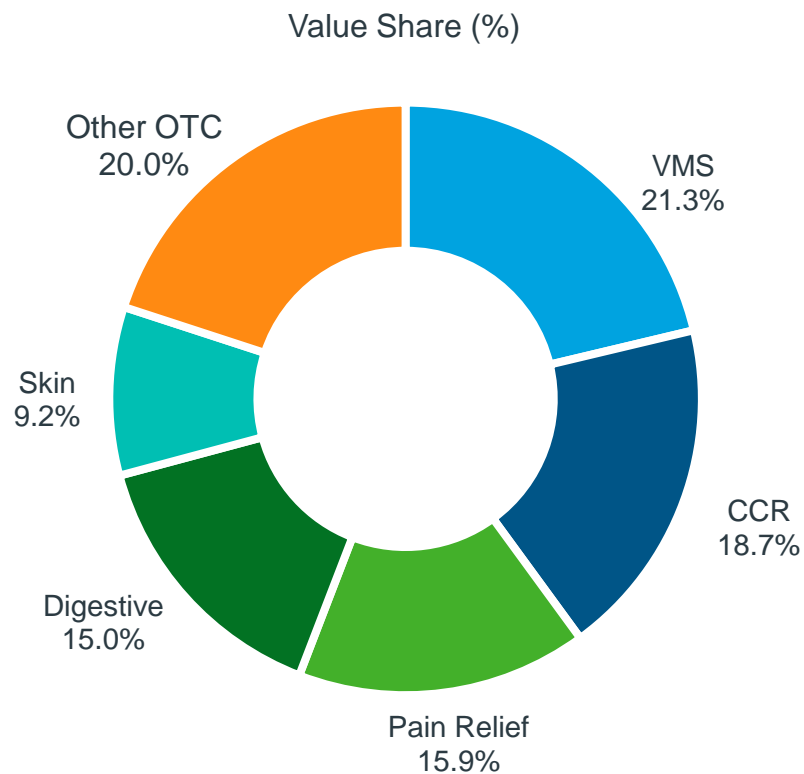


# CCR sales hit by Covid-19 restrictions and consumer stockpiling

Global

*By contrast preventative products – VMS – benefitted from growing consumer interest in ‘wellness’*

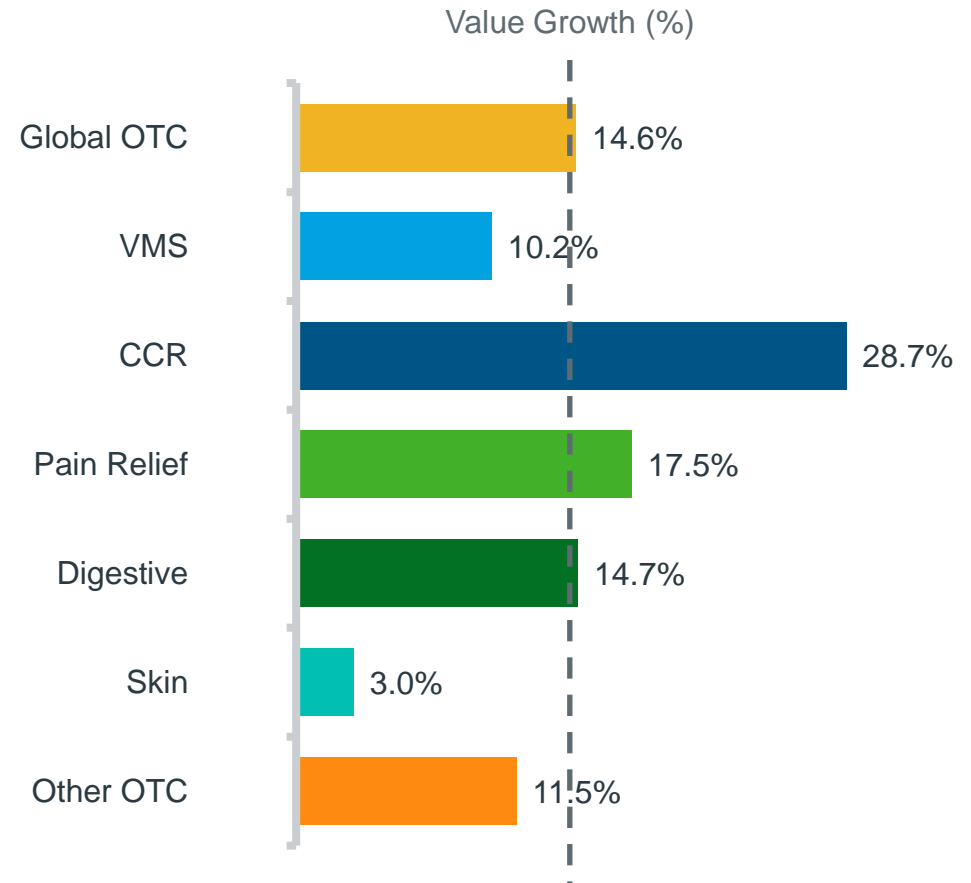
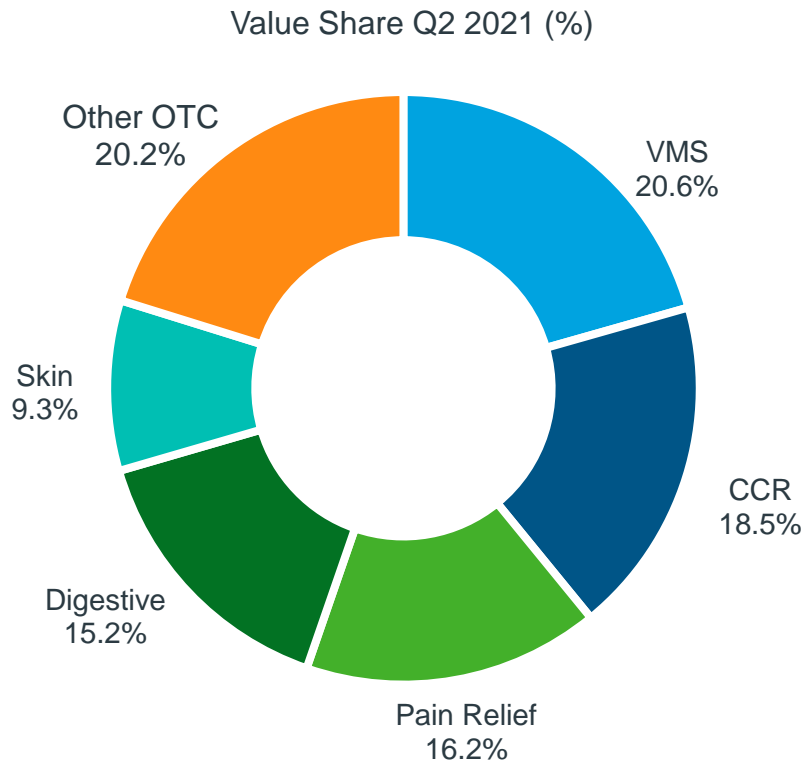
## Global OTC – Core Categories MAT Q2 2021

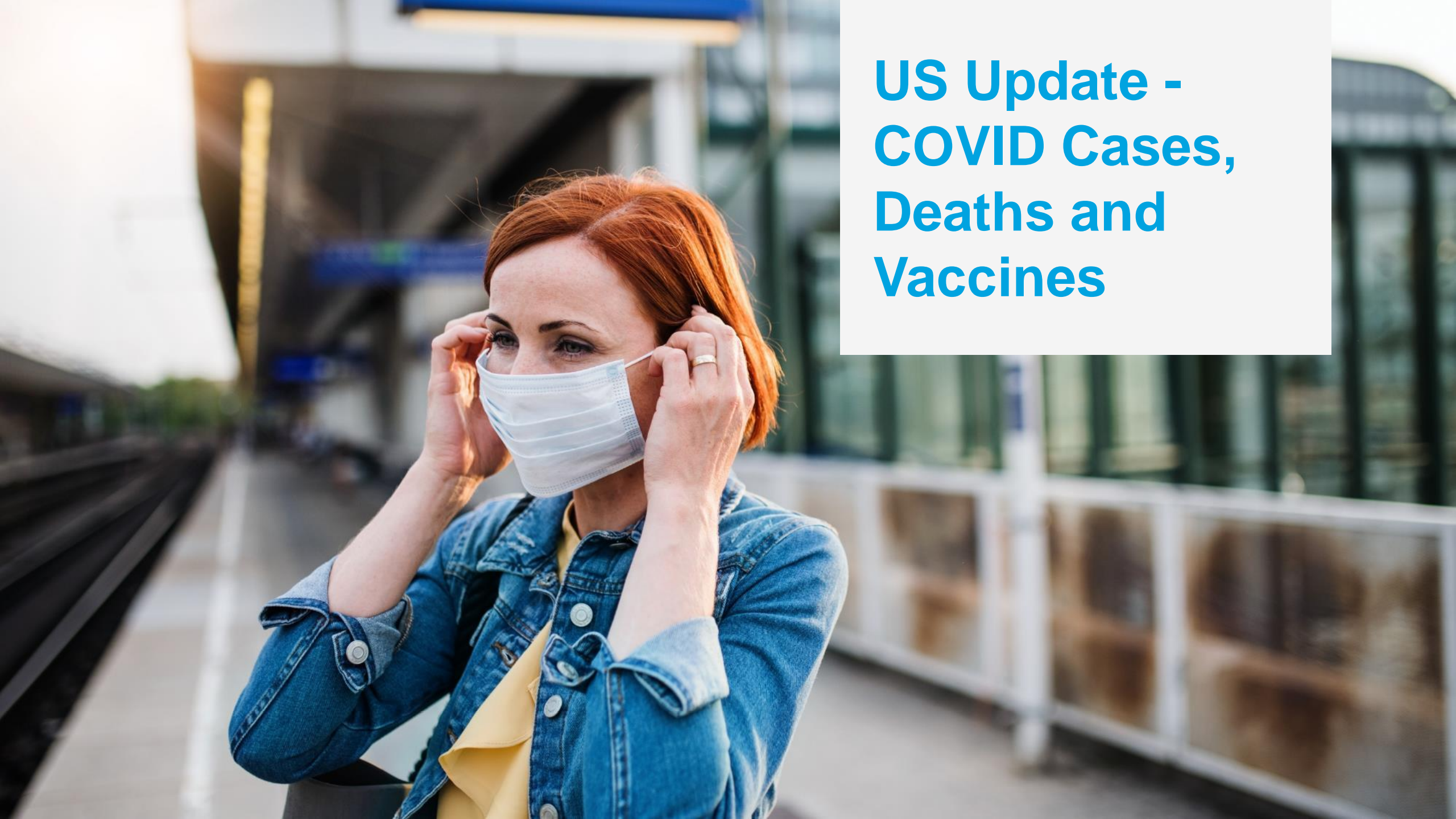


# CCR rebounded in Q2 year-on-year from low base

*Trend towards prevention/wellness maintaining its momentum*

Global OTC – Core Categories Q2 2021 vs Q2 2020

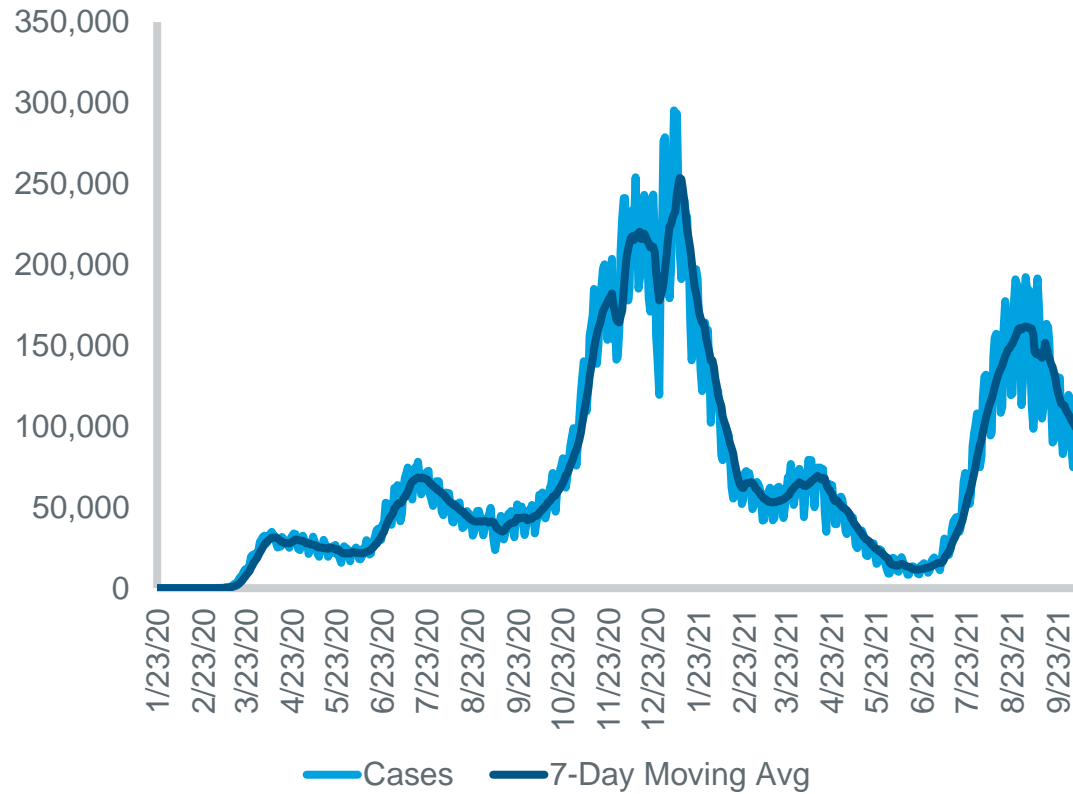


A woman with red hair is shown from the chest up, wearing a white surgical-style face mask and a blue denim jacket over a yellow top. She is adjusting the mask with both hands. The background is a blurred train platform with a white railing and a train car visible in the distance.

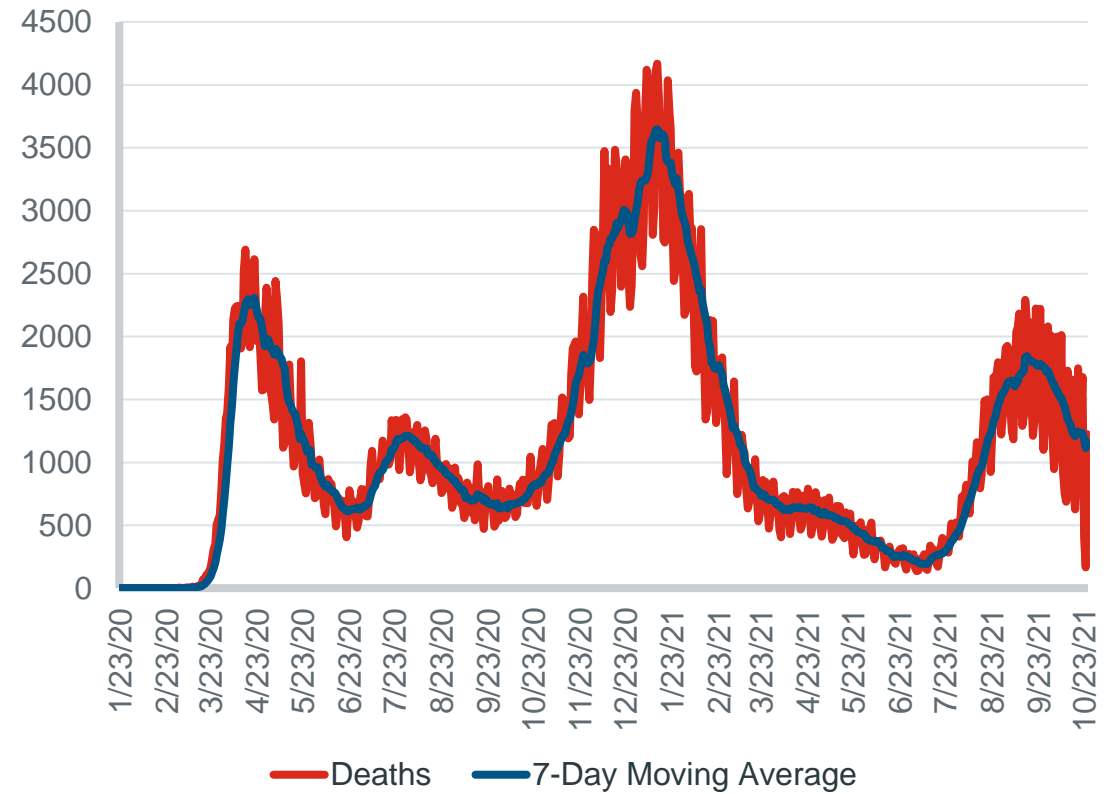
# US Update - COVID Cases, Deaths and Vaccines

# US COVID-19 cases and deaths are decreasing

## U.S. COVID Cases 7-Day Moving Averages



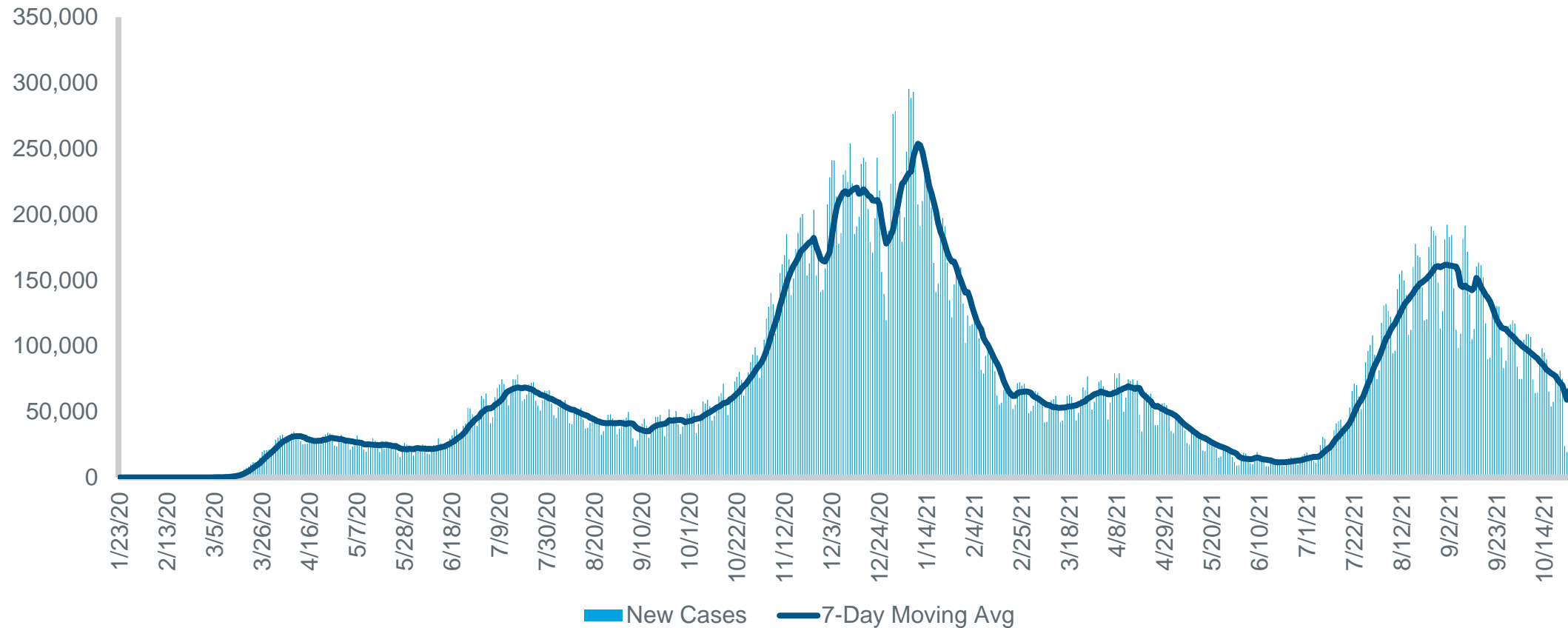
## U.S. COVID Deaths 7-Day Moving Averages



# Daily US COVID-19 cases falling from late-August summer peak

*The amount of daily tests coming back positive is also declining*

## U.S. COVID Daily Cases

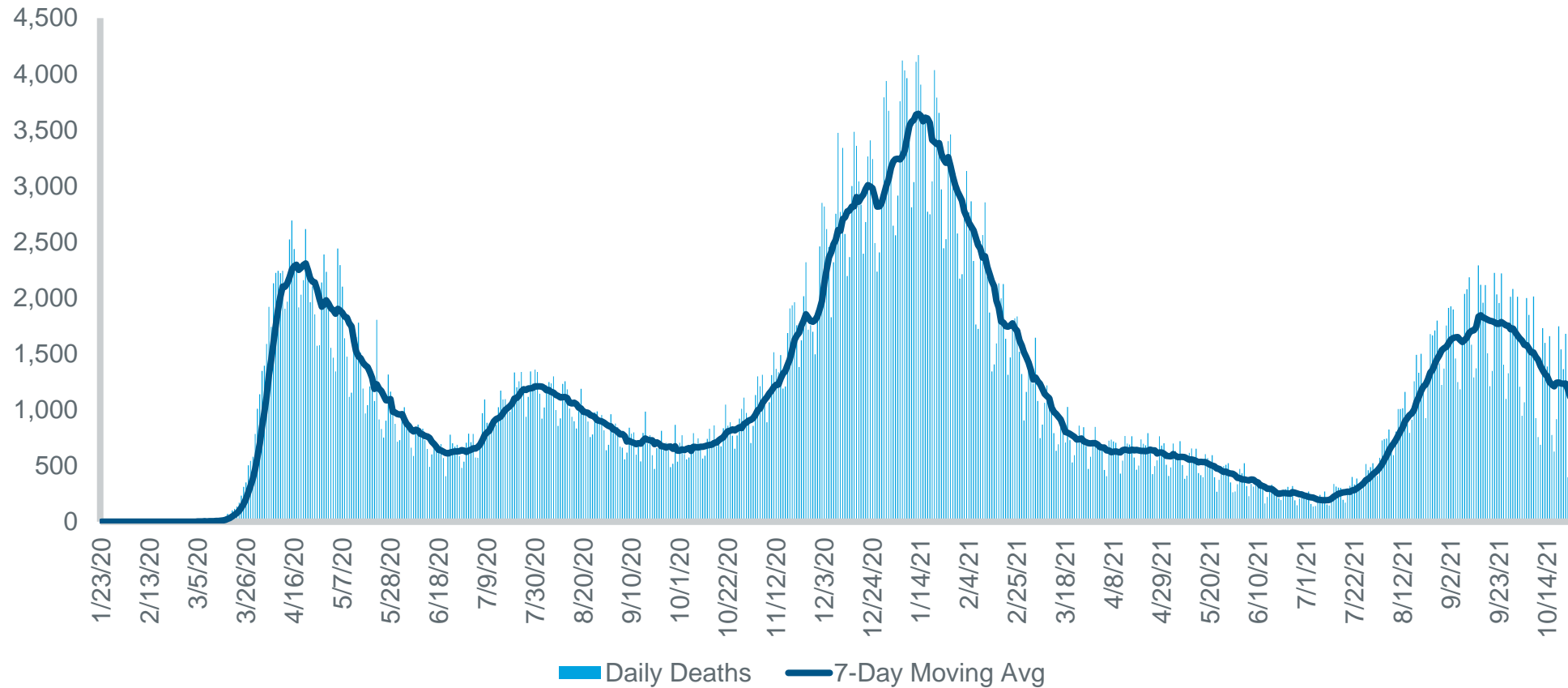


Source: [https://covid.cdc.gov/covid-data-tracker/#trends\\_dailytrendscases](https://covid.cdc.gov/covid-data-tracker/#trends_dailytrendscases) – data as of October 27, 2021  
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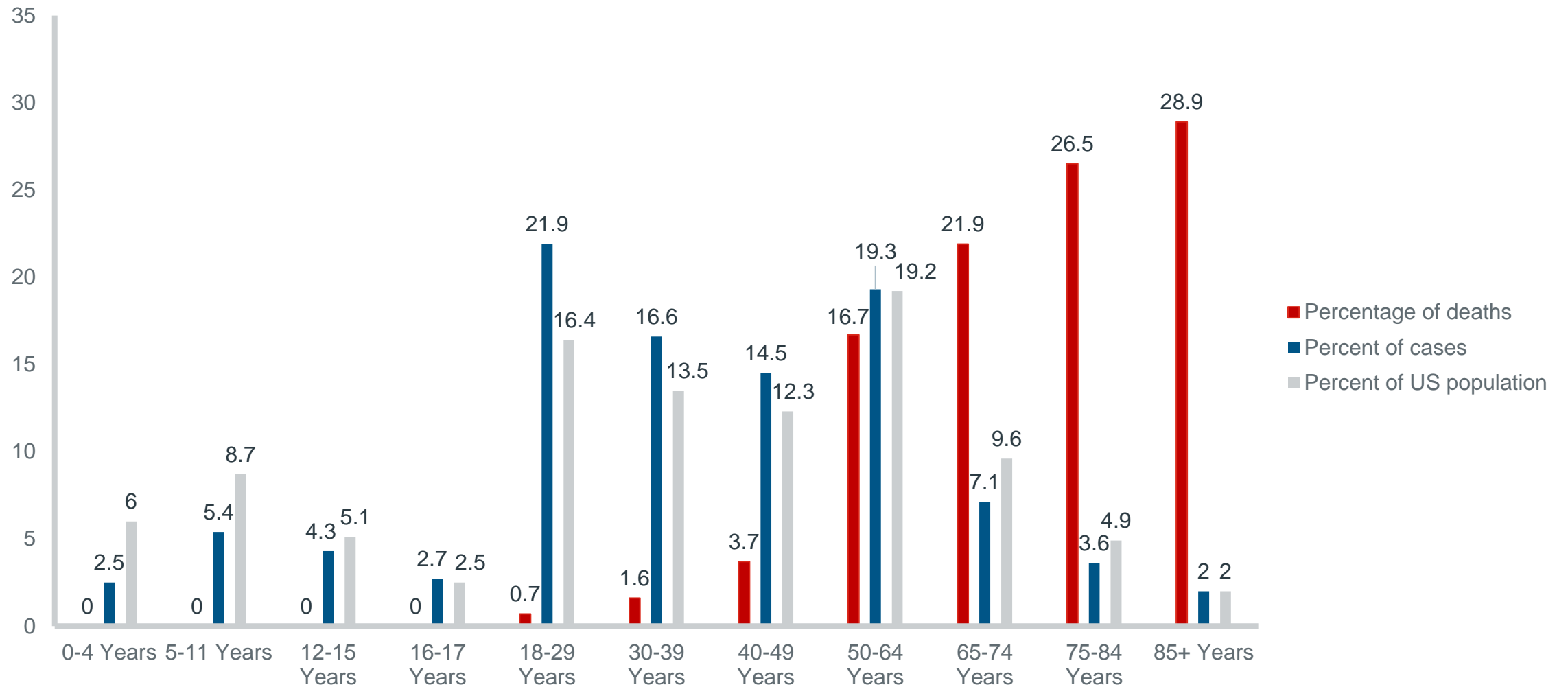
# Daily US COVID-19 deaths have been decreasing in recent weeks

## U.S. COVID Daily Deaths



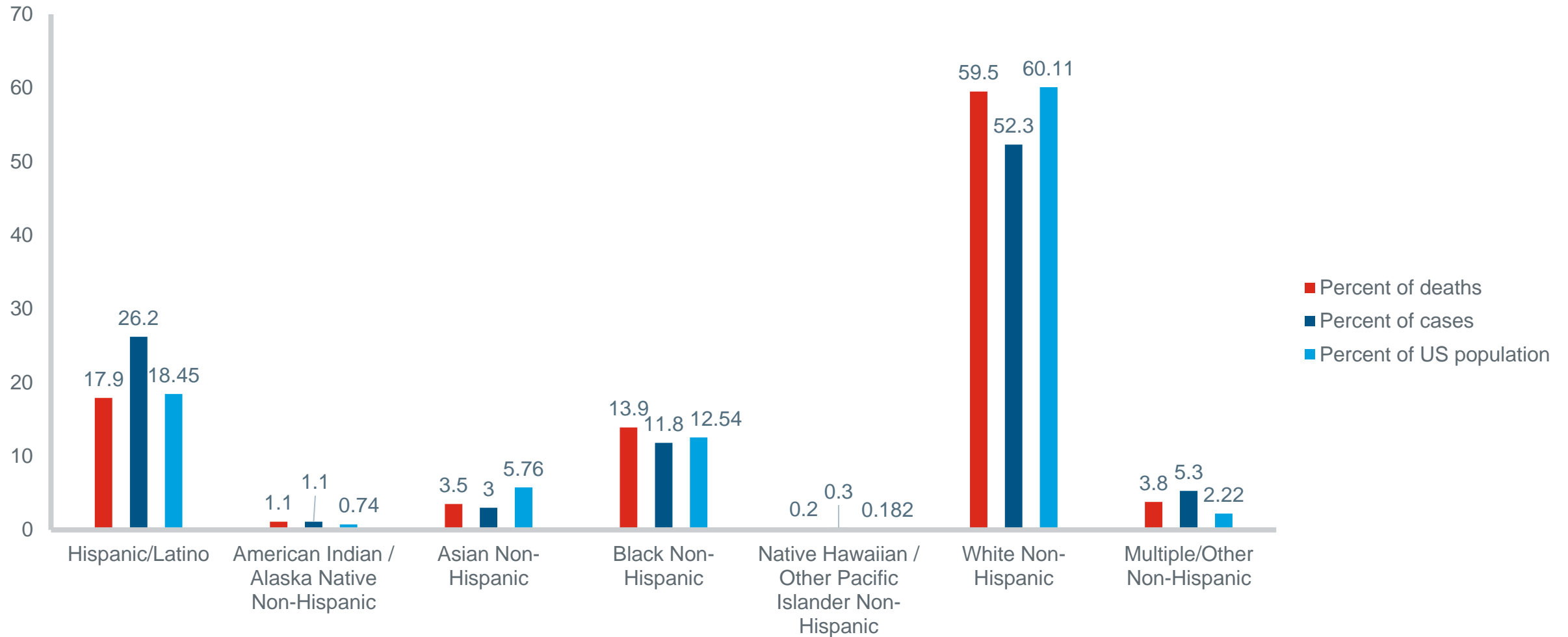
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# Percentage of cases, deaths, and US population by age group



Data from 36,228,910 cases. Age group was available for 35,854,534 (98%) cases Data from 596,986 deaths. Age group was available for 596,918 (99%) deaths.. <https://covid.cdc.gov/covid-data-tracker/#demographics>  
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# Percentage of cases, deaths, and US population by ethnicity

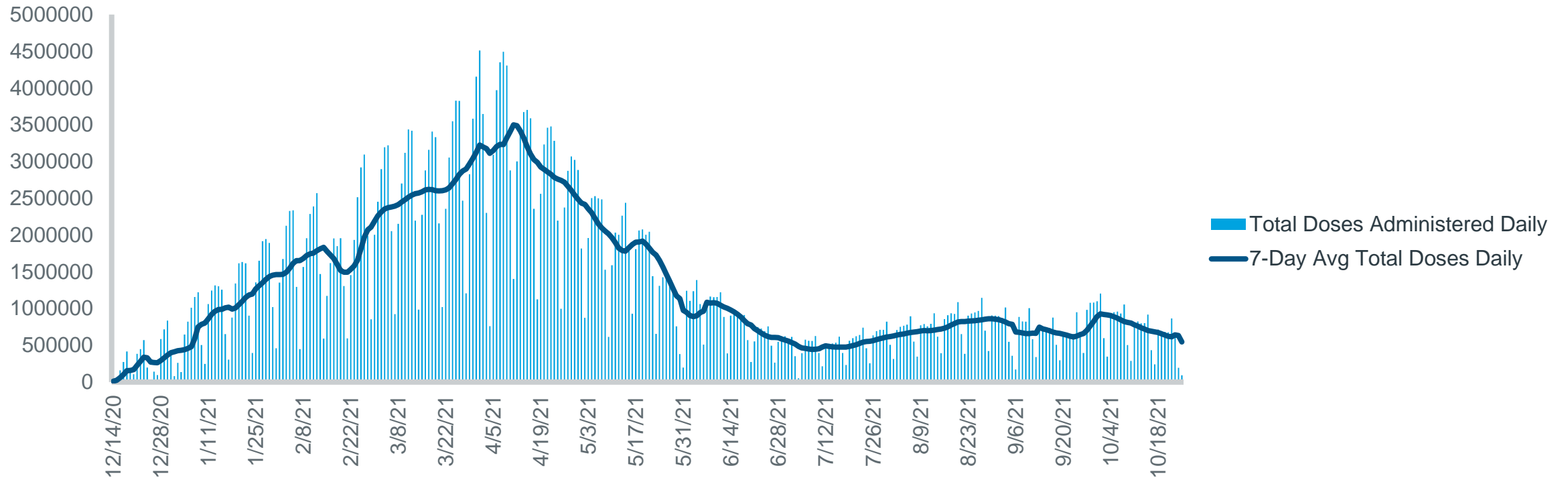


Data from 33,819,971 cases. Age group was available for 98% of cases.  
 Data from 559,459 deaths. Age group available for 99% of deaths. <https://covid.cdc.gov/covid-data-tracker/#demographics>  
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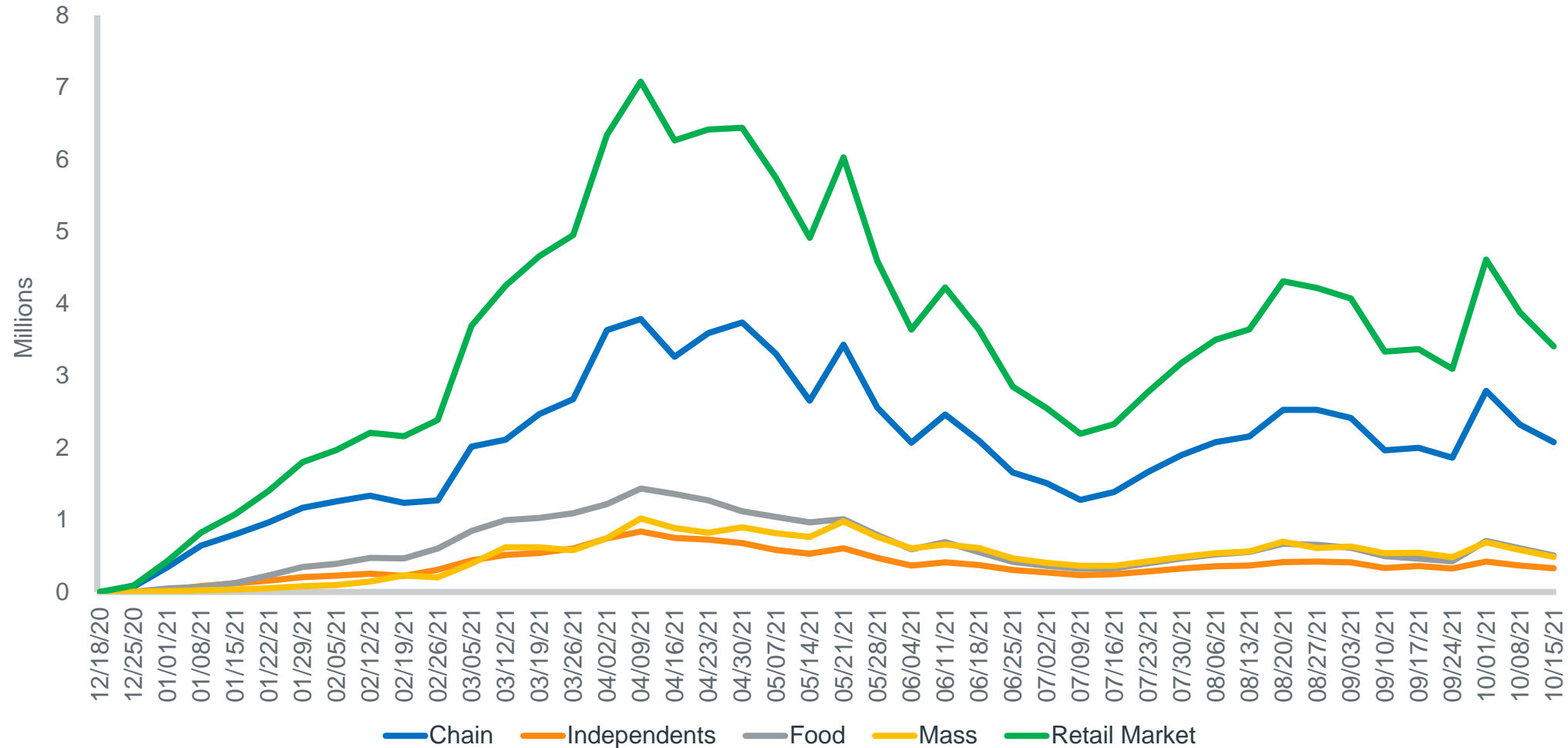
# COVID-19 vaccination rates have been levelling off...

*As of October 11, 7-day average of daily doses administered is approximately 556,000*

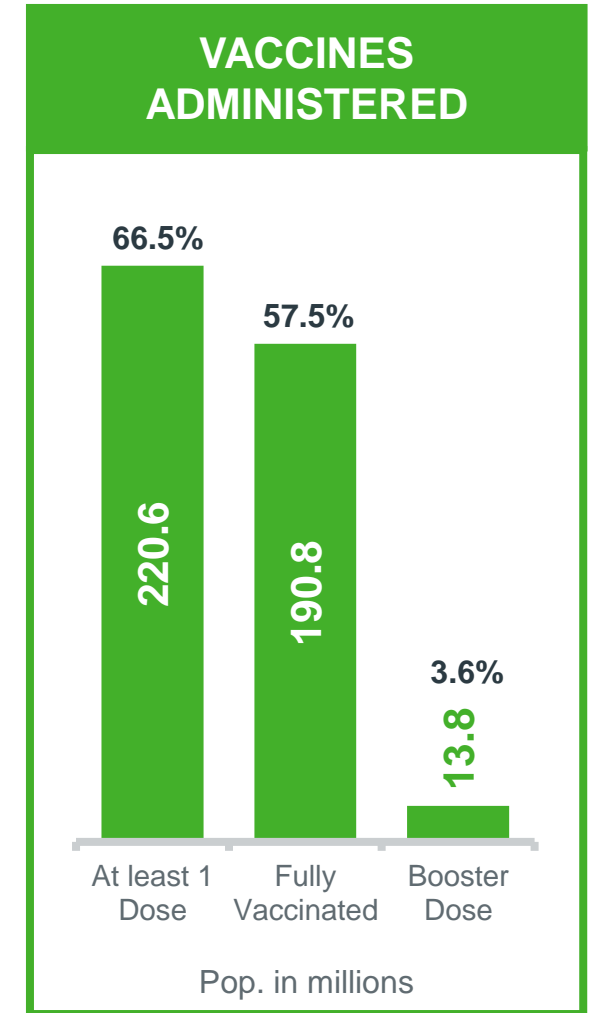
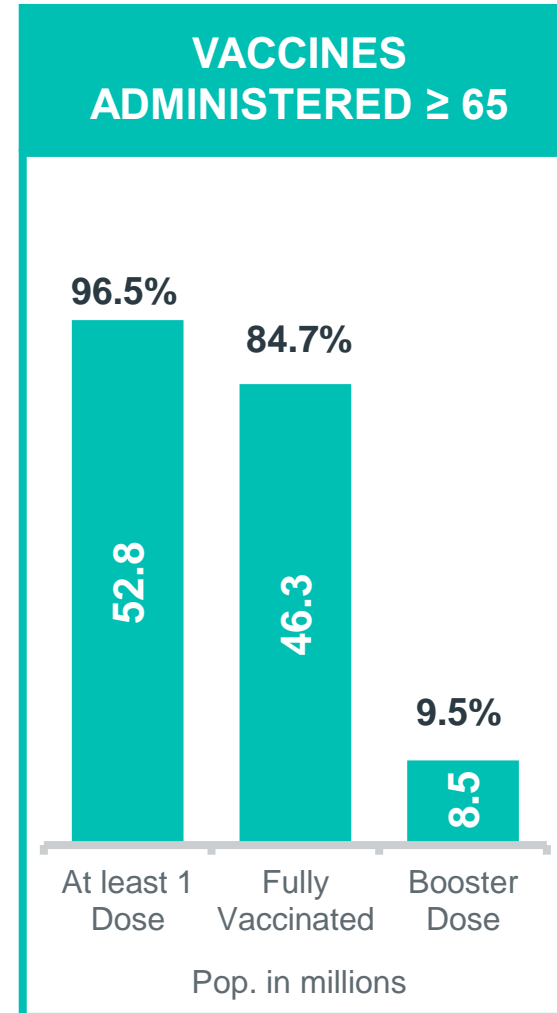
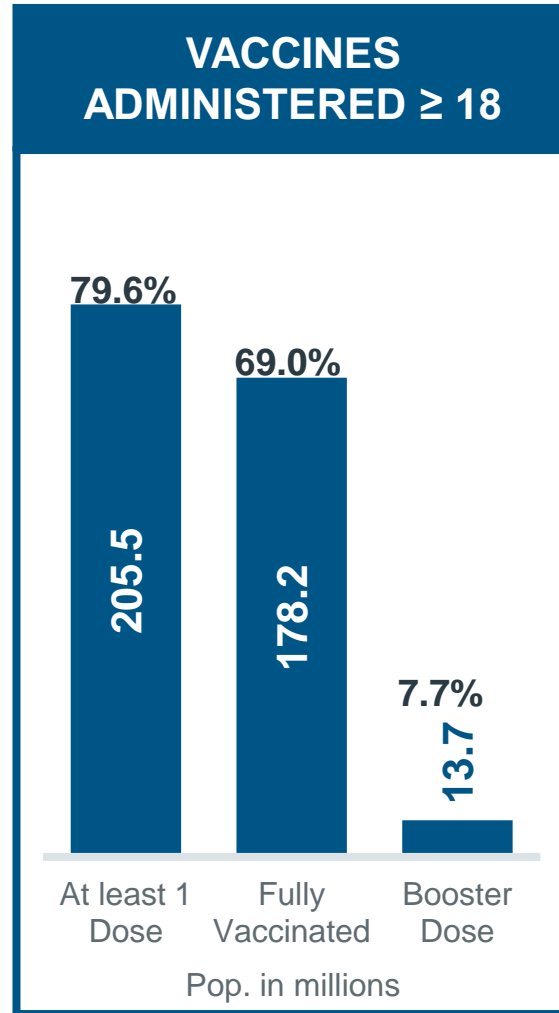
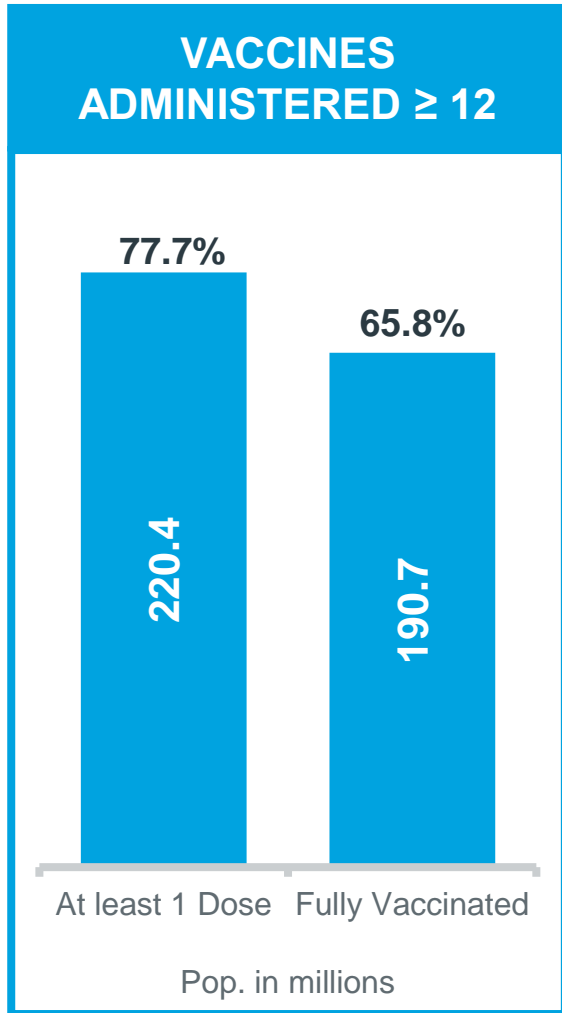
### Daily Count of Total Doses Administered and Reported to CDC by Date Administered, United States



# But retail COVID-19 vaccines increased in October due to boosters

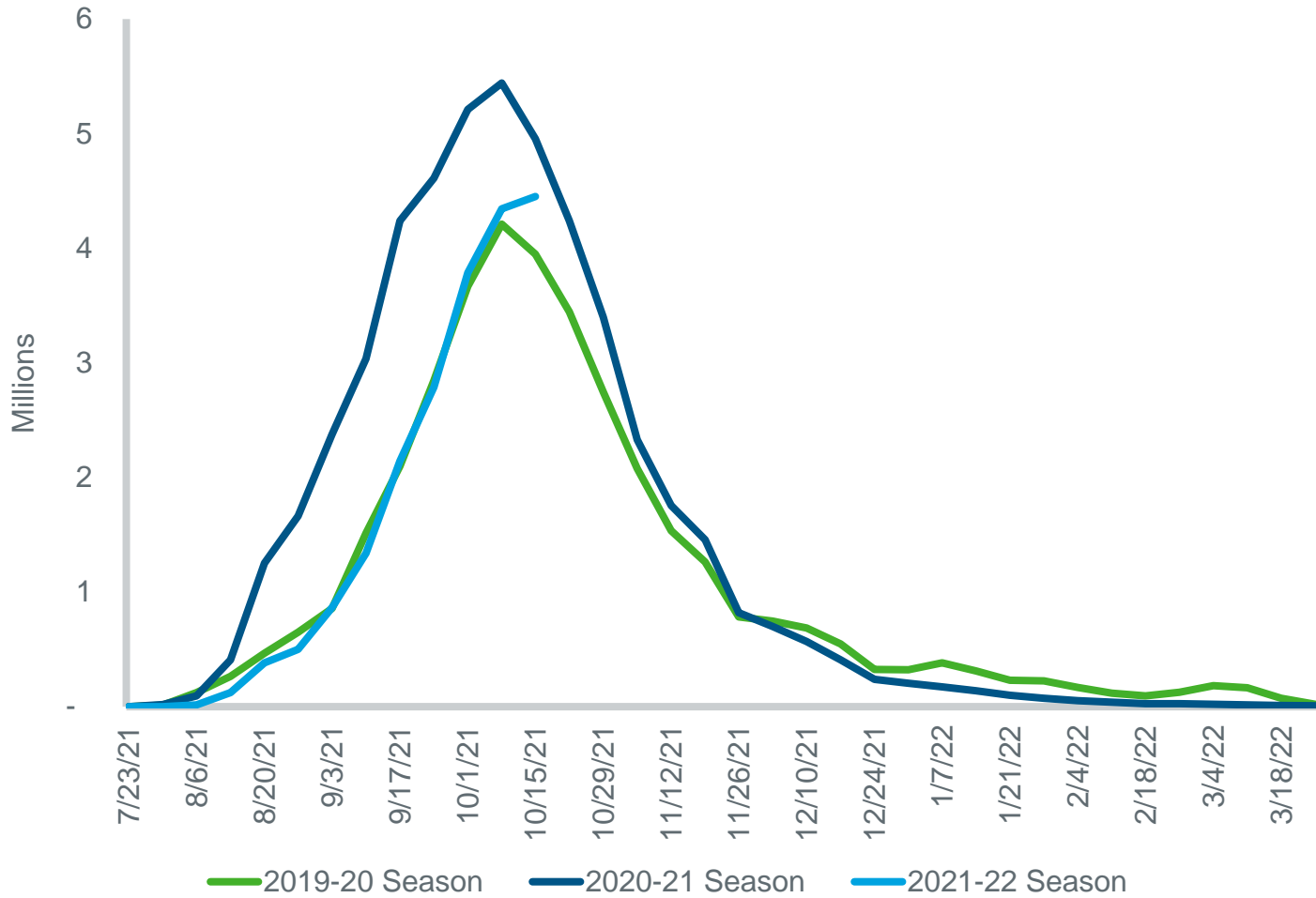


# 57.5% of the entire US population is fully vaccinated; Booster doses not available for first category

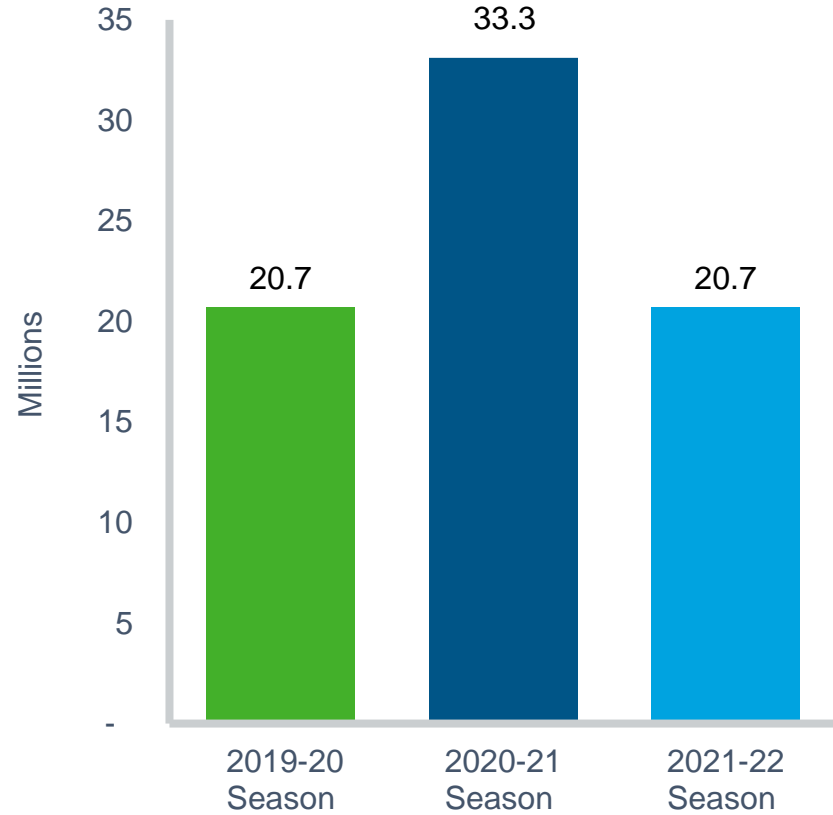


# So far, the current season is closely following the 2019-2020 Flu vaccination trendline

Total Retail Flu Vaccinations



Season to Date Vaccinations



# The Flu season in Australia can be an early indicator of our season in the US and current trends are showing a weak season



\*5 year average is calculated using 2015, 2016, 2017, 2018 and 2019 data  
 ^Data are age standardized in this chart  
 Data Source: <https://info.flutracking.net/reports-2/australia-reports/>



**72.8%**

of Australians 18-64 have received a flu vaccine, compared to **82%** at the same time last year



**90.7%**

of Australians 65+ have received a flu vaccine, compared to **93.9%** at the same time last year




# US Cough, Cold and Flu 22/22 – Into the Unknown



# FAN and AAN

Align suppliers and retailers to seasonal consumer suffering driven by Cough-Cold, ILI & Allergies



**FAN & AAN reporting uses real-time data from IQVIA's longitudinal patient-level data warehouse**

- IQVIA patient-level data is the broadest de-identified longitudinal database available.
  - Sourced from over **1000** data sources:
    - *Retail Pharmacies, PBMs, System Vendors, Health Provider Systems, Clearinghouses, Practice Management Vendors, Hospitals, Labs*
  - Over **3.5 billion** claims per year
  - Over **306 million** unique patients



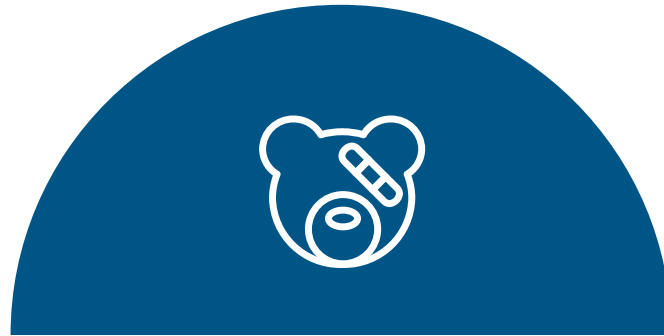
# A lot of firsts because of COVID going into the 21/22 season

*More unknowns than during the 20/21 season as pandemic-driven cultural changes kick in*



## Adults

- Working from home
- Companies telling employees to stay home when their sick
- Temperature checks at work
- Masking



## Peds

- Masking in schools (Varies by stated and county)
- Increased sanitation in schools
- Improved ventilation in some schools
- Plexiglass dividers for classrooms (Varies by school)
- Remote learning options



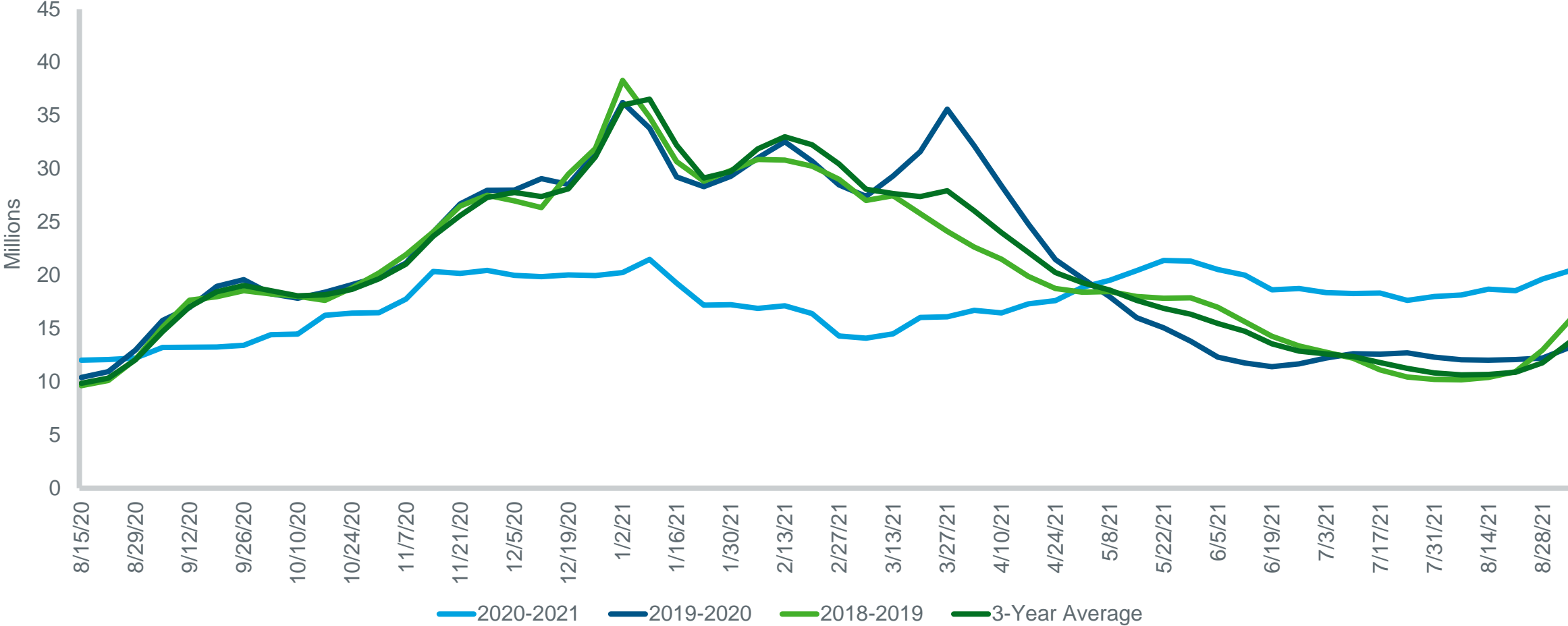
## All

- Increased use of prevention type products, i.e., vitamins, hand sanitizers, cleaning products, etc.
- People limiting exposure to other individuals

# As restrictions eased reported cough, cold, flu symptoms shot up

*FAN report for all symptoms indicates more cases beginning in May in comparison to the past 2 yrs*

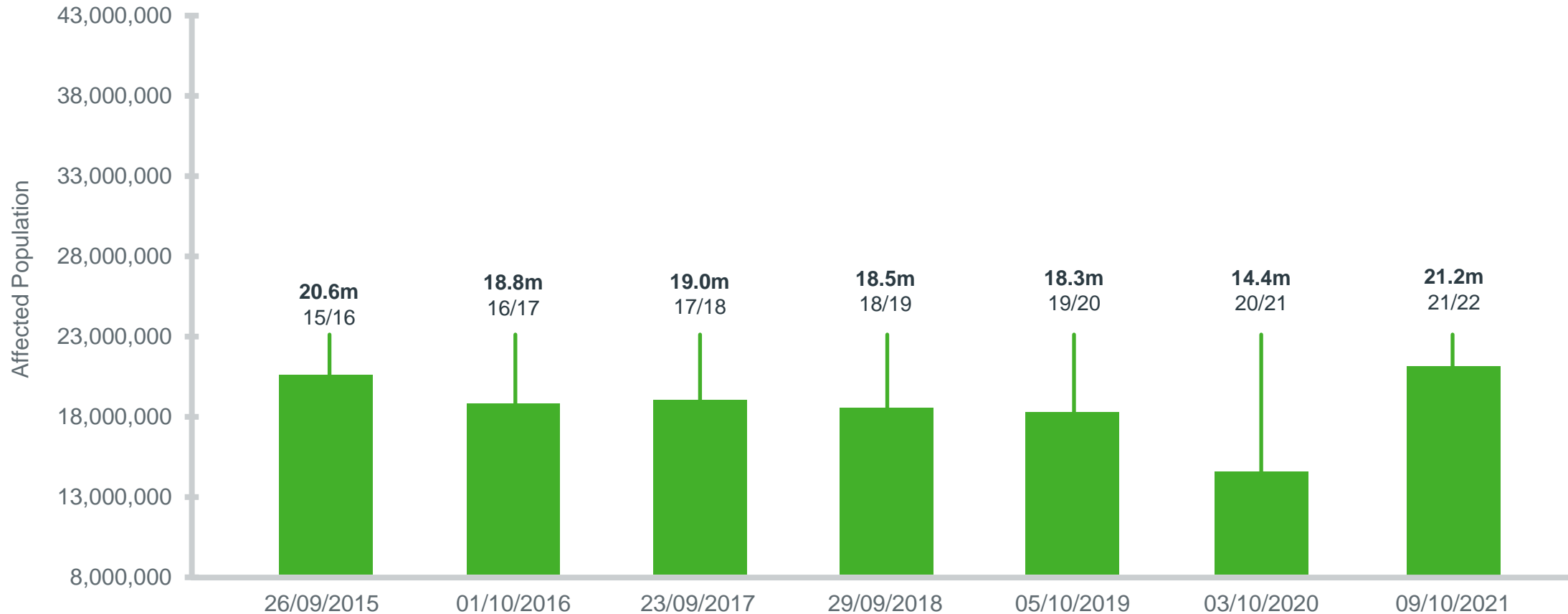
**FAN Report: All Symptoms**



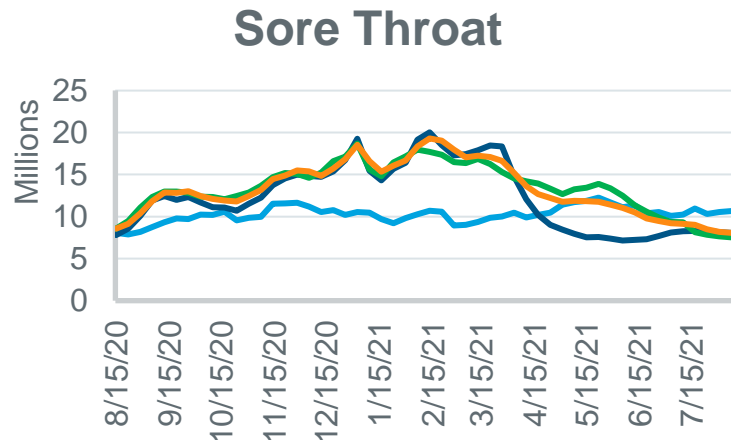
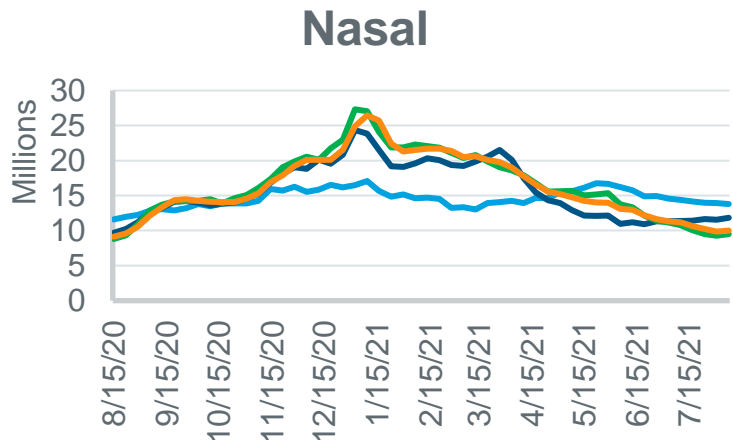
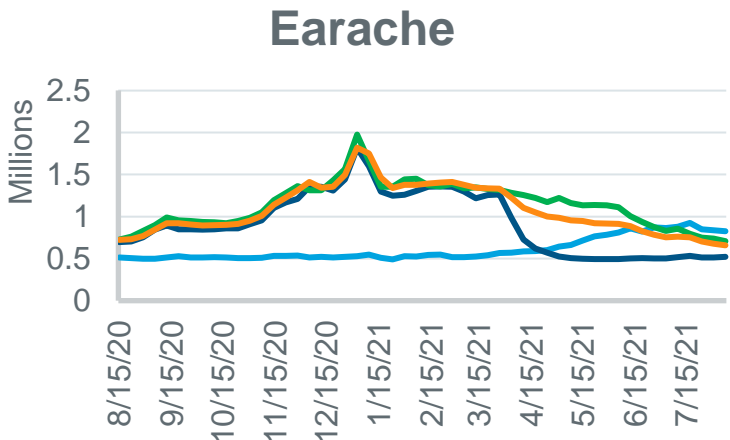
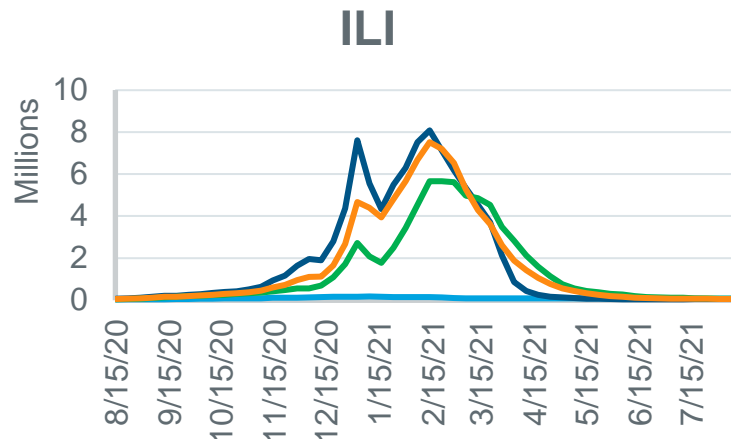
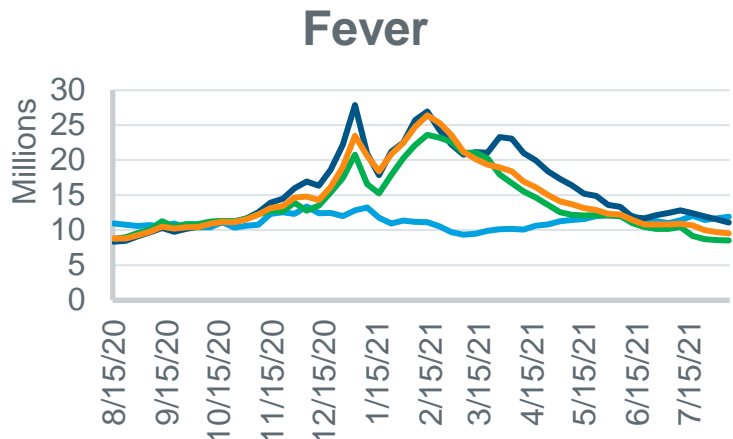
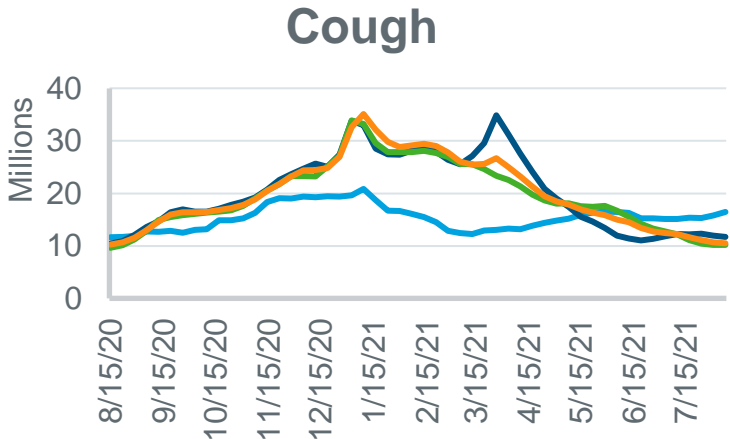
# Now total affected pop. is above previous seasons and +46% on 2020

*Historically, not seen these levels of affected pop. in late Sept/early Oct since 2015/2016*

## FAN Total Affected Population 2015/16 through 2021/22



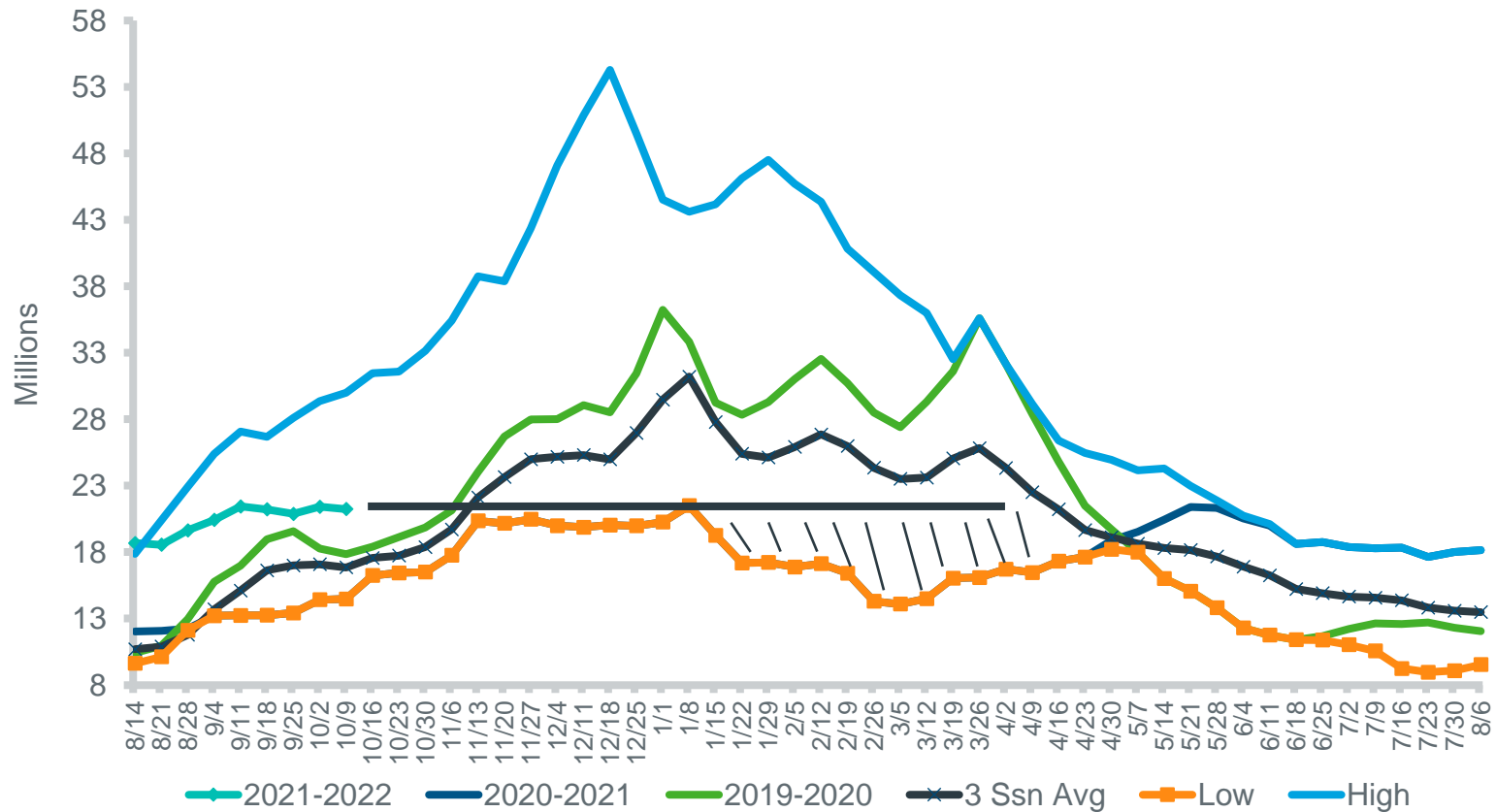
# Across the different symptoms on the FAN<sup>®</sup> report, Cough, Earache, Nasal and Sore Throat are running ahead of seasonal norms



— 2020-2021    — 2019-2020    — 2018-2019    — 3-Year Average

# Yet season on track to be well below historic rates – why?

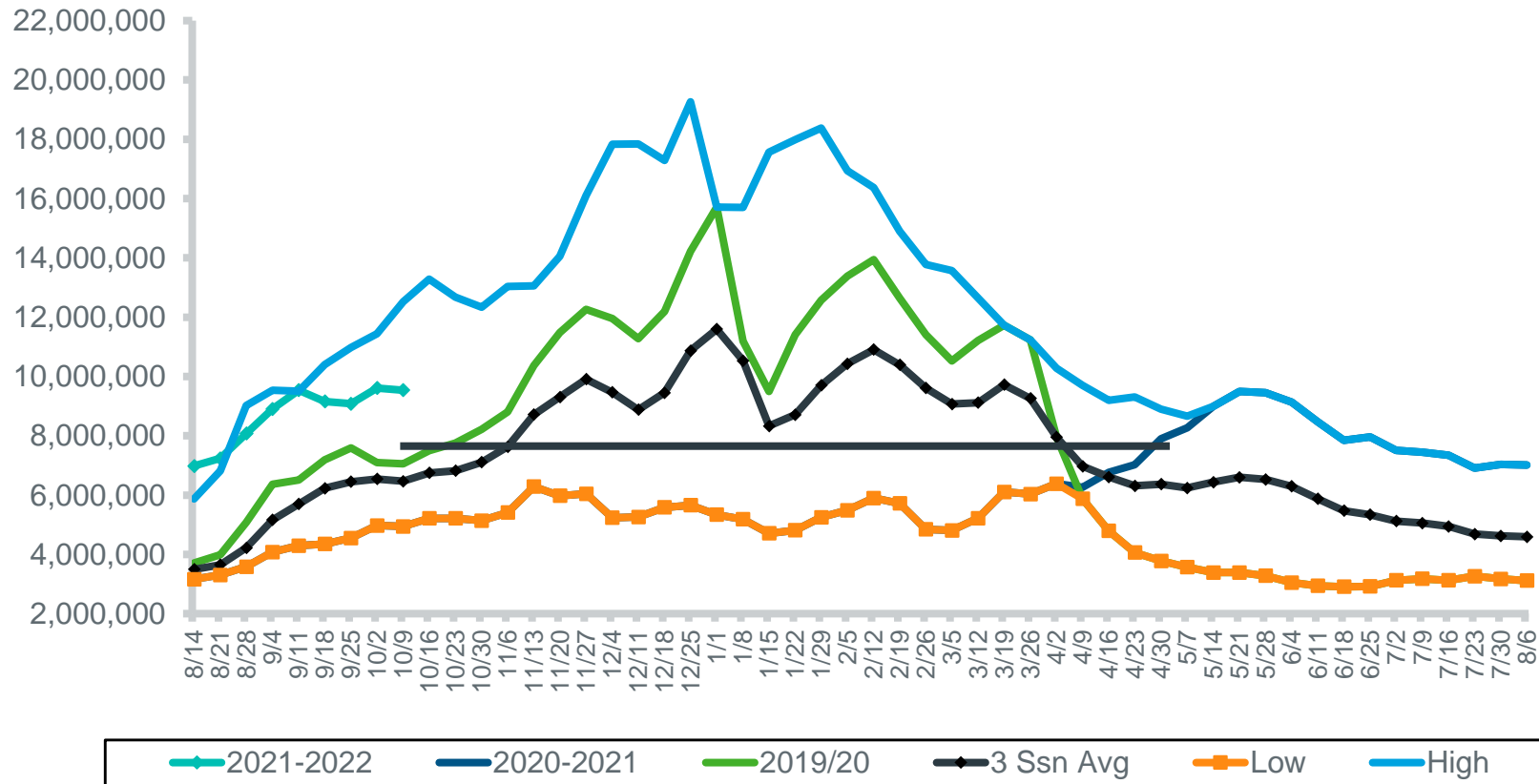
Q1 2022 offering biggest opportunity in terms of year-on-year uplift



- The total affected population will trend over 2020.
- The biggest opportunity overall will be in Q1 for both adult & pediatric segment.

# While pediatric segment should be positive across the season...

For Q3 2021, the affected pediatric population is +116.5% vs. Q3 2020.

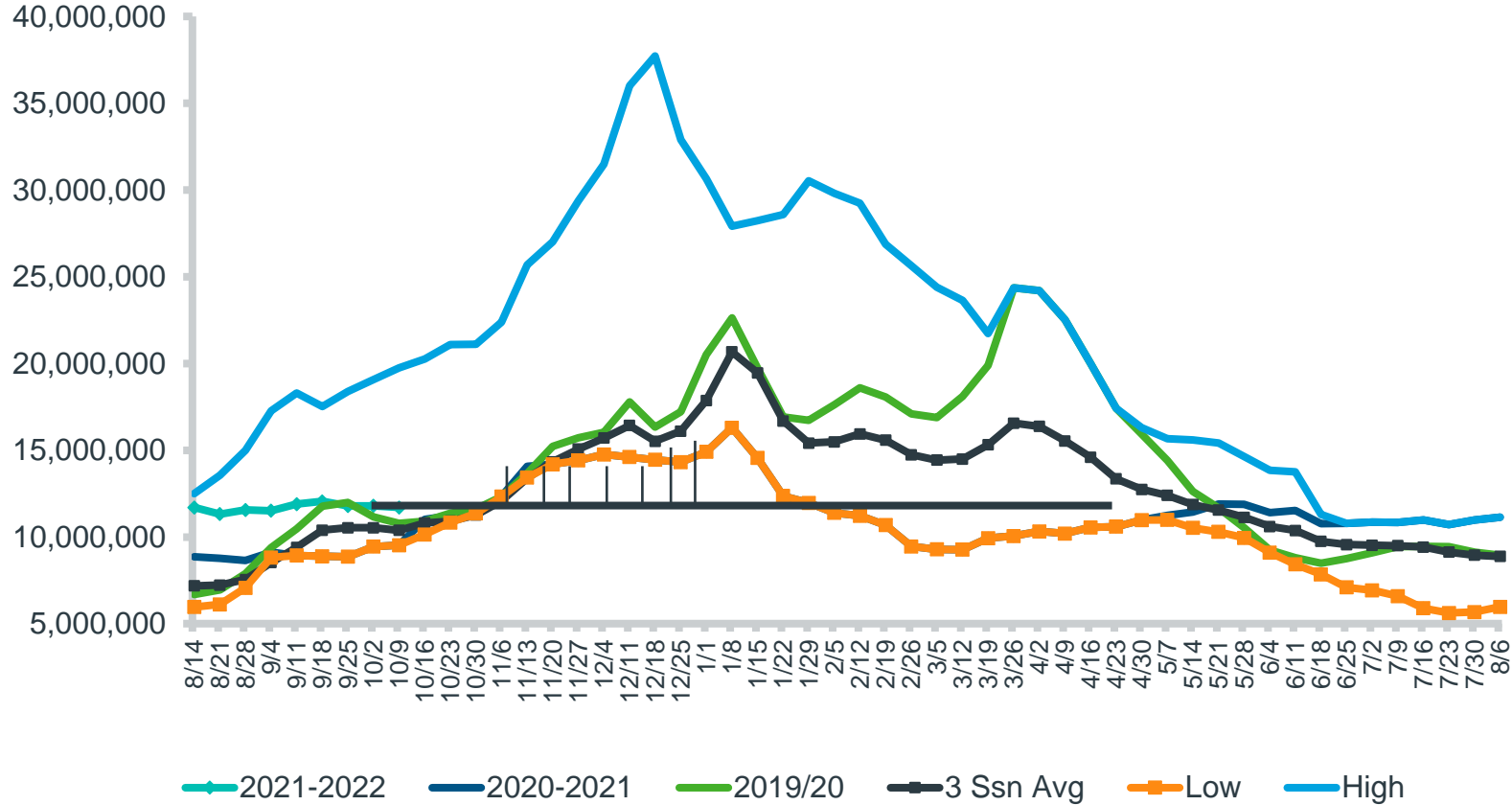


- The pediatric segment provides the biggest opportunity over a year ago, as this segment is closer to being back to 'normal' than the adult segment
- There are still restrictions/rules in place that will continue reduce illness in the pediatric segment.



# There is a risk that the Adult segment will flatten damaging sales

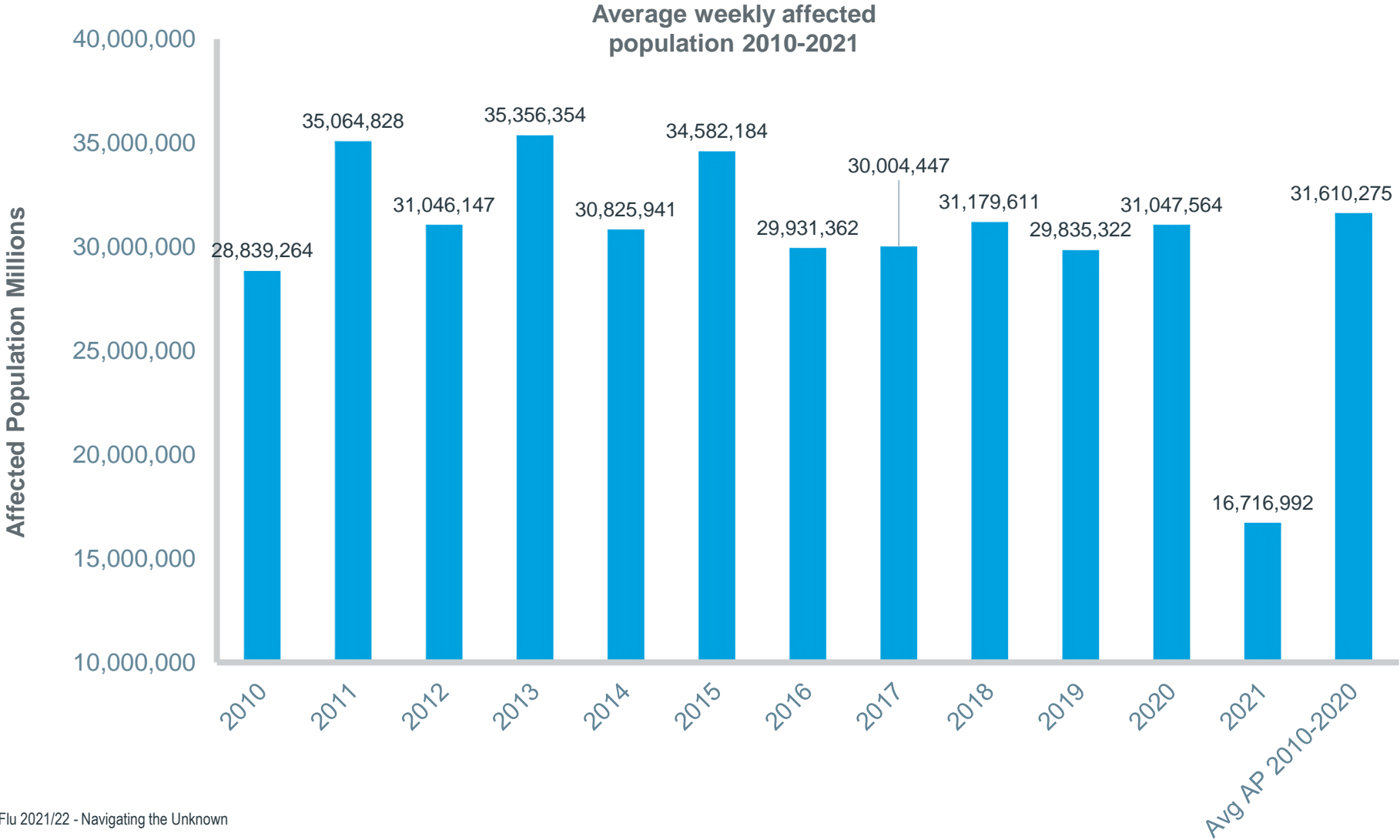
For Q3 2021, the Affected Population is +25.7% vs. Q3 2020...the adult segment potentially has a risk in the back half of Q4



- The adult segment should see some softening in Q4 Vs. YAG, because it is up against COVID increasing the adult affected population in November and December in 2020.
- The segment should see some negative weeks in the back half of the quarter.
- The adult segment has more unknowns that will limit illness than the pediatric segment, which is why we are not seeing the same lifts as the pediatric segment.

# Opportunity lies in Q1/22 due to big drop in Q1/21 affected pop.

Q1 2021 down -45.6% in Avg. Weekly AP as markets remained closed and vaccines rolled out.



# Conclusion— Opportunities and Challenges



# Seasons will weaken generally, but adaptation can equal success

*Season's tail is getting stronger and opportunity to be more targeted*

## Opportunities



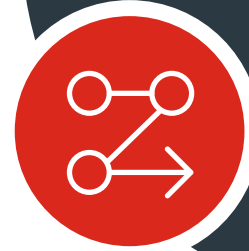
### Look later in the season

Tail of the season is getting stronger

### Illness Levels

Target hot spots where affected population levels justify spending against them

## Challenges



### Prevention is working

Long term trend of vaccinations and preventative products impacting incidence levels

### The best is behind us

15-year trend shows decline in season strength

# Q&A

# Your IQVIA Consumer Health contact



## **Chip Schaible**

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Please submit your questions and enquiries to: [consumer.health@iqvia.com](mailto:consumer.health@iqvia.com)

Or visit [www.iqviaconsumerhealth.com](http://www.iqviaconsumerhealth.com) for more information



Thank you

