

White Paper

Digital Innovation

Global Consumer Health Trends 2023

EDITED BY: **MATT STEWART**, Global Marketing Manager, IQVIA Consumer Health



Consumer health companies continue to lag behind sectors such as banking and entertainment in adopting digital approaches. However, the pandemic has driven growth in investment in digital innovations across many markets.

Today's healthcare consumer is expecting not just a pill-in-a-pack product. They expect value-added, holistic solutions that blend the physical product in their wider healthcare lifestyle through value-added services such as on-going support via an app; or digital therapeutic products that have a direct impact on their health.

HCPs are also responding to the consumer desire for a more holistic approach, offering more services whether online or off, and in turn that has made HCPs demand a broader approach to engagement with industry. Online information channels are now key for HCPs as they find themselves time-poor in an ever more demanding healthcare environment. So, innovating on how you engage these crucial stakeholders is also key.

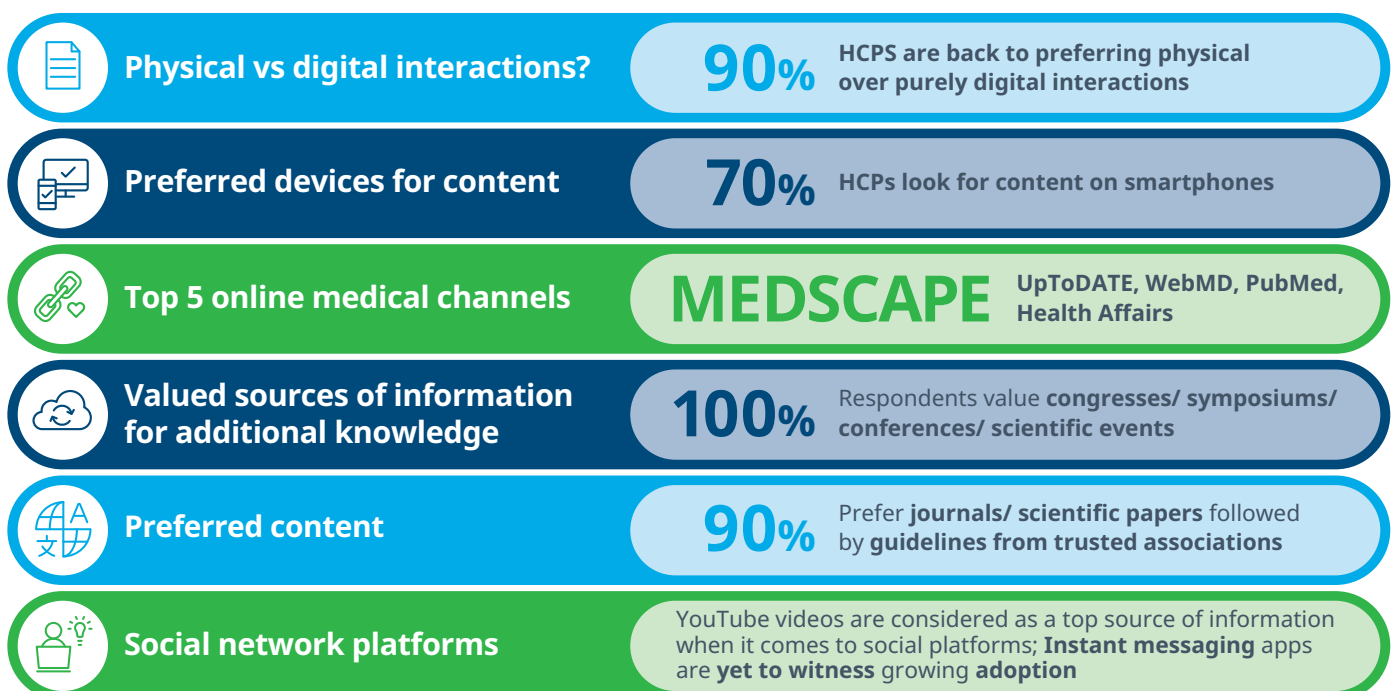
One market – the Middle East – a dynamic, young and fast-growing area encapsulated this shift perfectly.

Middle East: Consumers and HCPs move to digital approaches

As in many markets, digital approaches represent the way forward in consumer health in Saudi Arabia and the UAE, with stakeholders including consumers and healthcare professionals (HCPs) moving to digital channels. HCPs are embracing virtual interactions, but tend to prefer a combination of face-to-face and online interactions to 100% digital ones (Exhibit 1).

Many HCPs offered telemedicine during the pandemic, and over four-fifths (82%) are still offering this post-pandemic. An estimated 93% of HCPs rely on information from online medical channels, selecting sources based on trust and the availability of clear, comprehensive information. The need to pay fees to access content is a barrier in the current digital landscape. HCPs interact with digital channels almost daily and are often willing to spend close to half an hour on information sources of interest. Medical journals and scientific papers are the favorite sources of information, a trend that has continued for many years. Digital sources may change this, however. For video detailing, HCPs typically prefer YouTube, with no adoption of instant messaging apps to date in the Middle East.

Exhibit 1: HCP trends in the Middle East



HOW IS DIGITAL APPROACHED CURRENTLY?



End- to End approach which connects various stakeholders

- Where to begin?
- Large upfront investments
- Understanding the focus on the bigger picture



ROI on digital investments

- Unsure of measurement KPIs
- Individual digital projects did not yield necessary results or were stalled at various stages due to lack of internal stakeholder buy-in

HOW SHOULD DIGITAL BE APPROACHED?



Go **deep into the care journey** to identify actionable intervention points



Stay Agile. Experiment, fail fast.

Measure milestones achieved at each step and re-design approach



Know when to **build/partner**. Scaling up often requires us to reassess our resources to understand how best we maximize our reach and returns



Healthcare is ultimately a **large ecosystem** with multiple stakeholders – providers, regulators, payers, pharma, and patients. Become the **ecosystem enabler**

Consumers in Saudi Arabia and the UAE currently have high standards for their purchasing interactions, expecting to be able to make a purchase with two clicks, but wanting in-person customer service to be available as well. This trend is expected to continue post-pandemic. Awareness of established digital health solutions such as e-Pharmacy and telemedicine remains high in both Saudi Arabia and the UAE, with Internet penetration close to 99% in both the countries.

Consumers primarily value the convenience and time savings offered by these solutions. Both these countries could accelerate the development of healthcare services by developing new business models and investing in promising technologies and value propositions. Consumers are broadly comfortable with ePharmacy and telemedicine, but some are unaware of these options, and others still prefer face-to-face interactions.

Although digital investment is taking place in some areas of the market, there is still ambiguity about the best digital approaches. Agile and programmatic approaches will help ensure successful investments (Exhibit 2). There remains reluctance to make the large investments required, as well as uncertainty on what metrics to use for KPIs. HCPs' preferences for digital engagement should also be considered in the context of other current healthcare innovations. New commercial models should be agile and reach out precisely to target audiences, helping save time on meetings without compromising the quality of interactions. Omnichannel approaches can help interact with all healthcare stakeholders.

Americas Contributors



MARIO MUNIZ
General Manager,
North Latin America, IQVIA



RENAN OLIVEIRA
Associate Manager for Consumer
Market Insights, Brazil,
IQVIA Consumer Health



BRIAN TOKAR
Global Consumer Health Key
Account Management Director, US,
IQVIA Consumer Health



JOHN ADAMS
Account Director, Canada,
IQVIA Consumer Health



ESTHELA VILLAVICENCIO
Director, Offering Management,
Mexico, IQVIA Consumer Health

APAC Contributors



AIRENE VALENCIA
Senior Principal, Asia Pacific,
IQVIA Consumer Health



LUCY WANG LU
Engagement Manager, China,
IQVIA Consumer Health



GERARD MULRONEY
Senior Director, Australia,
IQVIA Consumer Health



JOWEL TACATA
GM, Indonesia, IQVIA



MYLENE RODRIGUEZ
GM, Philippines,
IQVIA Consumer Health

Europe Contributors



JYOTI SHAH
Director, Global Offering
Development, IQVIA
Consumer Health



IGNACIO CHUECA CLOSA
BU Director, Spain,
IQVIA Consumer Health



THOMAS HEIL
Vice President, Germany,
IQVIA Consumer Health



AURÉLIEN BELLUYE
Principal 2, France,
IQVIA Consumer Health



DAWID CZAJKOWSKI
Senior Consultant, Poland, IQVIA

Middle East & India Contributors



MARIAN ELFIZY
Senior Regional Key Account
Manager, Middle East & Africa,
IQVIA Consumer Health



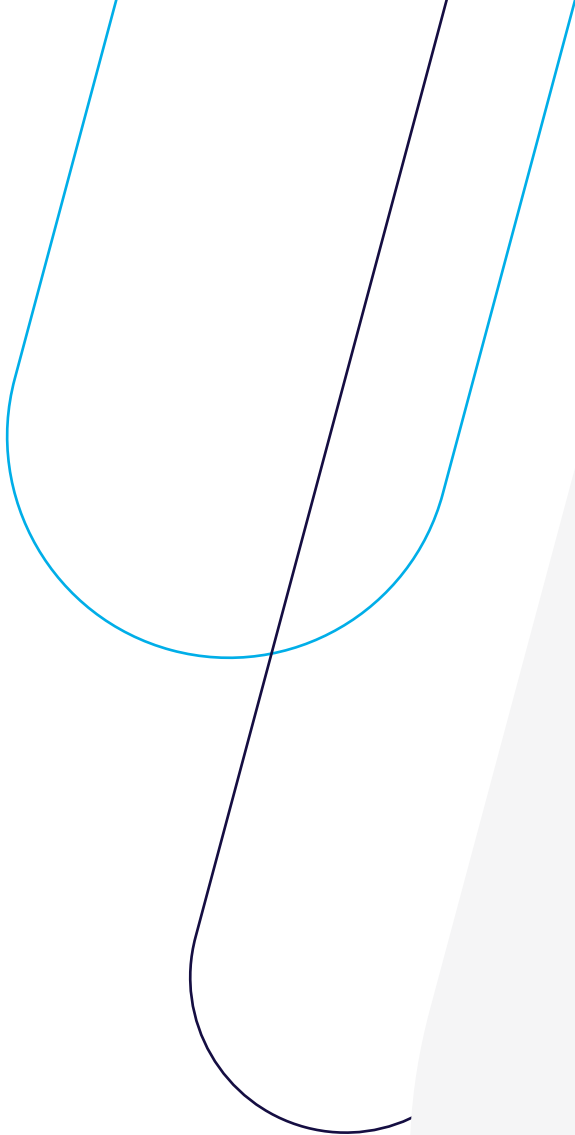
ADHITI KUMAR
Regional Key Account Manager,
Middle East & Africa,
IQVIA Consumer Health



TINA KHADLOYA
Sr Principal, India,
IQVIA Consumer Health



CHARU MULLICK
Head of Consumer Insights,
India, Haleon



CONTACT US

37 The Point,
North Wharf Road, Paddington,
London, W2 1AF
consumer.health@iqvia.com
[iqviaconsumerhealth.com](https://www.iqviaconsumerhealth.com)