

THE PHARMA BRANDEMIC COVID VACCINE IMPACT ON CONSUMER PHARMACEUTICAL CHOICE

KEY RESEARCH FINDINGS | APRIL 2021

M Booth Health, a leading health communications consultancy, in partnership with Savanta, the market research and advisory company, conducted a survey of 1,000 demographically diverse consumers, aged 18+, between 4/10/21 and 4/15/21.

PHARMA BRAND RECALL SPANS THE BRANDS

- ▶ **Johnson & Johnson, Pfizer, Moderna, and AstraZeneca** – in that order– are the **top pharmaceutical company brand names** consumers could cite, unaided.
- ▶ Consumer-aided pharmaceutical brand name awareness was led by **J&J at 93%**, followed by **Pfizer at 90%**, and **Moderna at 80%**; non-COVID-19 vaccine brands also performed well with **Bayer at 70%** and **Merck at 52%**.
- ▶ Conversely, **fewer than 3%** of consumers could name a company that makes **seasonal flu vaccines**.

COVID-19 VACCINE BRAND PREFERENCE IS CLEAR AND WILL IMPACT FUTURE PHARMA BRAND PREFERENCE

- ▶ **74%** of Americans prefer a **specific vaccine brand by name**.
- ▶ The **top three** cited preferences were **Pfizer (36%), Moderna (19%), and J&J (17%)**.
- ▶ Among those who said they **preferred Pfizer**, their reasons included **vaccine efficacy (45%), positive study data (35%), reportedly fewer side effects (32%), reading a positive news story (29%) and social media posts by family/friends (21%)**.
- ▶ **56%** of the participants that prefer the Pfizer vaccine said this will make them more likely to **trust medicines/drugs made by Pfizer in the future**.
- ▶ Of those who said they **preferred Moderna**, their reasons included **vaccine efficacy (32%), reportedly fewer side effects (31%), positive study data (30%), and social media posts by family/friends (23%)**.
- ▶ **J&J preference** was distinguished by **pre-existing trust in the brand (26%)** and the benefit of being “one and done.” **24.3% of those who prefer J&J cited the single shot as the reason**.

CONSUMERS ARE INFORMED AND MORE INTERESTED IN PHARMACEUTICAL BRANDS

- ▶ **45%** of Americans say they are **actively staying informed** about COVID-19 vaccines, and **43%** say they are **casually staying informed**. Only **11%** say they are **not interested**.
- ▶ **80%** of Americans say they will **now check the label of a prescribed drug** to see who makes it before taking it; **50%** of Americans report **rarely or never checking the label** of either a prescription or drugstore medicine to see what company makes it.
- ▶ **45%** of Americans consider themselves **knowledgeable** about the differences between the COVID-19 vaccines that are available.
- ▶ **Pfizer** is the vaccine brand that Americans say they **heard the most about in the last twelve months**.
- ▶ **Doctors** are still the top source of information Americans turn to learn about **how safe a drug/medicine is (65%), how well a drug/medicine works (66%), how to get access to a drug/medicine (67%),** and the **side effects of a drug/medicine (60%)**.

SOCIAL MEDIA IS CRITICAL CONSUMER SOURCE FOR PHARMACEUTICAL INFORMATION

- ▶ **33%** of consumers say they want pharmaceutical brands to **make it easy to ask questions about medications** on social media.
- ▶ **32%** of consumers say they want **more video and photo content about medications** on social media.
- ▶ **39%** of consumers say **short videos from a pharmaceutical company that explain medicines/drugs/vaccines** would be most helpful to them on social media.
- ▶ **46%** of Americans found **Facebook to be the most useful social media site for learning about the COVID vaccine** because it's been the best way to see/hear people's experiences.
- ▶ **39%** say they **prefer to follow a pharmaceutical company or brand on Facebook** over other social media platforms.
- ▶ More people say they have **seen COVID vaccine brands appear by name in consumer posts on social media (26%)** than those who have **seen posts on company channels (25%)**.

CONSUMERS VIEW PHARMA BRANDS DIFFERENTLY AS A RESULT OF COVID-19 AND PLAN TO CHANGE THEIR BEHAVIORS FOR FUTURE MEDICATION CHOICE AND USE

- ▶ **34%** of Americans say they now **think of pharma brands in the way they think of consumer brands like Nike and Amazon**.
- ▶ **55%** of consumers say they will now **ask their doctor about all therapeutic options** instead of accepting the first recommendation they receive.
- ▶ **57%** of Americans say they are more likely to **read up on the science behind a vaccine or medication** before they request or accept it.
- ▶ **48%** of Americans say that they will **pay more attention to the differences between pharmaceutical companies** next time they are prescribed or choose a treatment/medicine.
- ▶ **46%** of Americans say they want to **hear more from pharmaceutical company leaders**.
- ▶ **Consumer trust** in a pharmaceutical company is still informed most by **what doctors say about the company (51%)** and **what other medical experts say about the company (50%)**.
- ▶ **37%** of consumers say they are **interested in hearing from government health officials** about the safety and efficacy of future vaccines and medicines/drugs.

FOR MORE INFORMATION, CONTACT:

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