

# 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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A surfer is riding a large, curling blue wave. The surfer is positioned in the center of the wave's barrel, riding a yellow surfboard. The wave is a deep blue color and is curling over, creating a tunnel-like structure. The background is a bright, overcast sky. The overall scene is dynamic and captures the power of the ocean.

**SIX ACTIONS PHARMA BRANDS CAN  
TAKE TO SUSTAIN MOMENTUM**

## SHOW UP LIKE A PHARMA-LIFESTYLE BRAND

Consumers pay attention to how your medicines make life better, with scant interest in the regulatory restrictions you face.

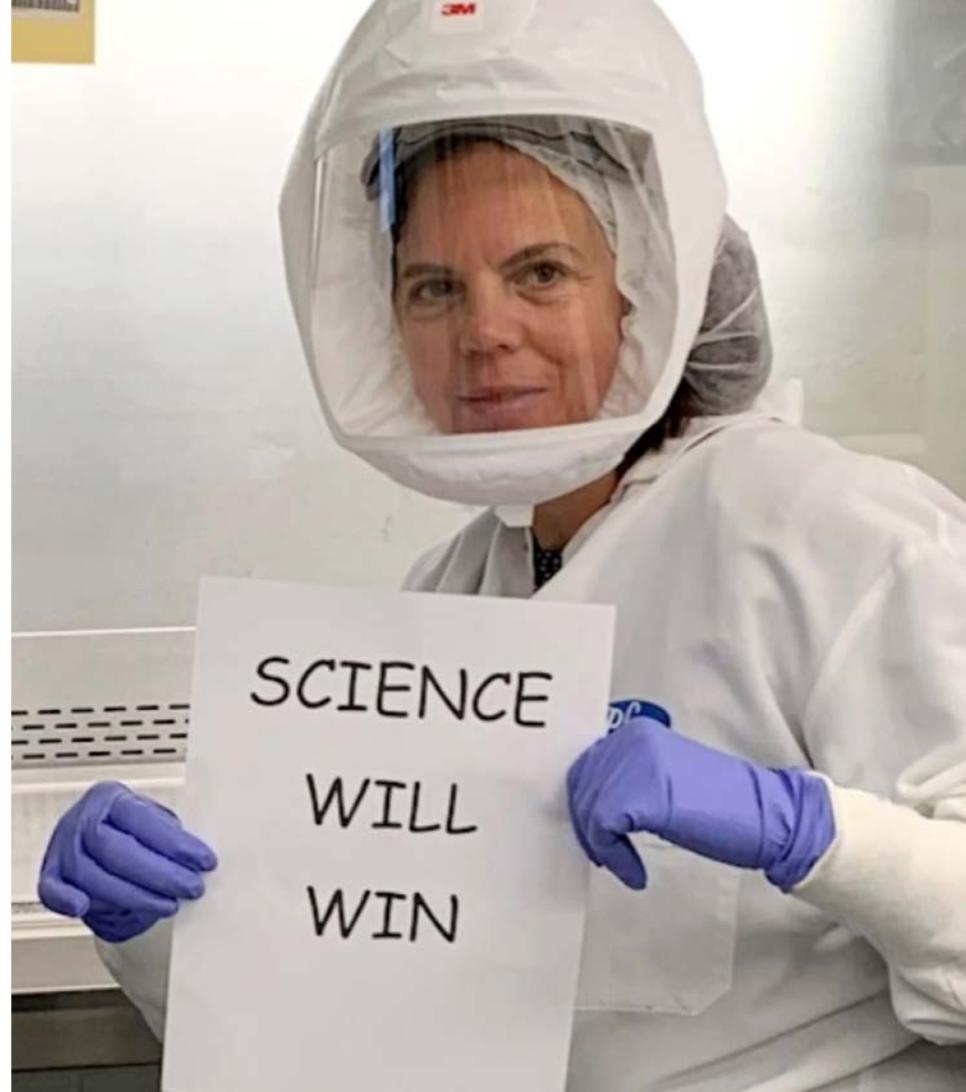
Think and operate like a pharmaceutical company, but act like a pharma-lifestyle brand by tapping into the emotional benefits of your products.



## LEAD WITH SCIENCE

Consumers are more science savvy, spending time to understand how medicines are developed, tested and work.

Choose the messages and the people that make your science story human.



## LISTEN AND ENGAGE WITH NEXT-GEN PATIENTS

Gen Z is actively driving conversation online about what they want – and don't want – from pharmaceutical brands.

Invest in listening to this next generation of patients and shape your communications strategies with them in mind.

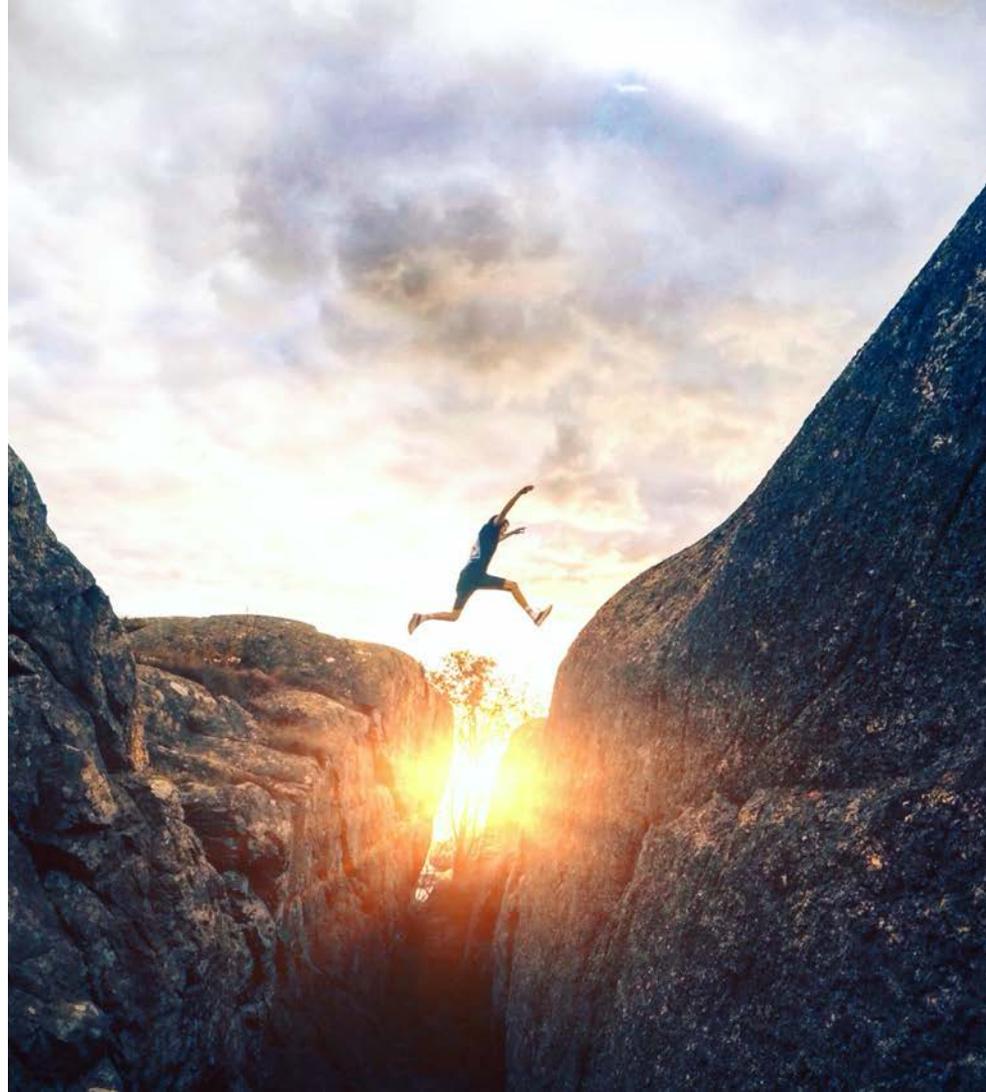


# DIAL UP YOUR RISK TOLERANCE LEVELS

More than 1 in 3 (38%) Americans say more transparency and openness would make pharma brands more likeable.

Showcase your company's personality and provide a peek at what's going on behind-the-scenes.

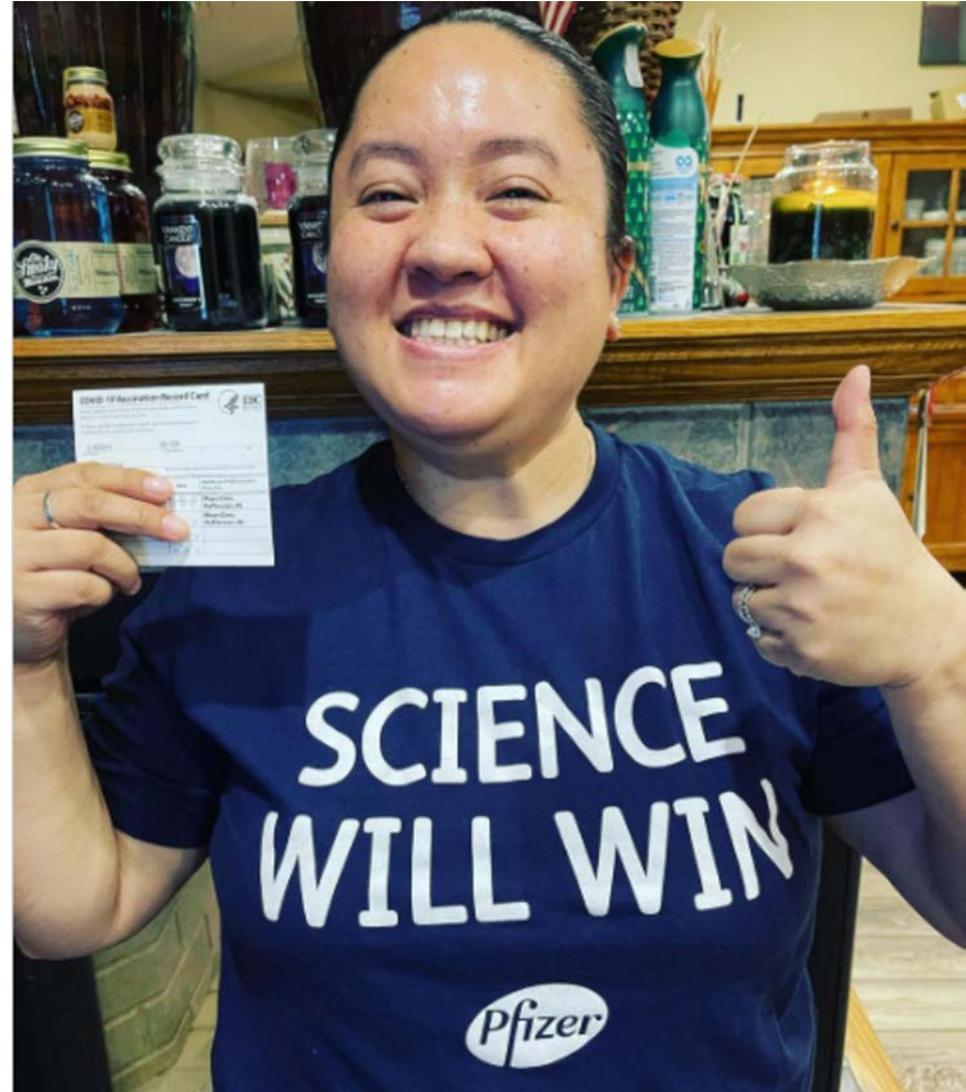
Source: M Booth Health Survey, April 2021



## MAKE RELEVANCE A PRIORITY

Different consumer segments have different wants and needs of brands.

Don't just focus on making your medicines available – make your brand accessible by prioritizing relevance for each them.



## TELL IT LIKE IT IS

Greater awareness and appreciation for pharma brands and what it takes to bring innovations to market has increased brand trust.

Prioritize translating your mission and vision into a human story that's real and relatable to stand out for the long term.



# SIX ACTIONS PHARMA CAN TAKE TO SUSTAIN MOMENTUM

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# WHO CONDUCTED THIS RESEARCH



M Booth Health is an award-winning, NY-based global health communications consultancy, whose clients include pharmaceutical companies, medical device manufacturers, government agencies, universities, medical societies, and advocacy organizations. The firm specializes in facilitating conversations, fostering connections, and shaping communications that lead to better health for people everywhere. M Booth Health is a Next Fifteen Communications Group (Next 15) company.



Savanta is a data, market research, and advisory company that informs and inspires through powerful data, empowering technology, and high-impact consulting, helping companies make better decisions and achieve faster progress.