



Adult **P**neumonia **V**accine **U**nderstanding in **E**urope

PneuvUE®

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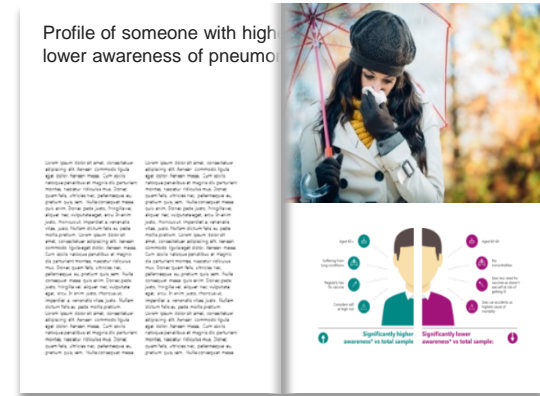
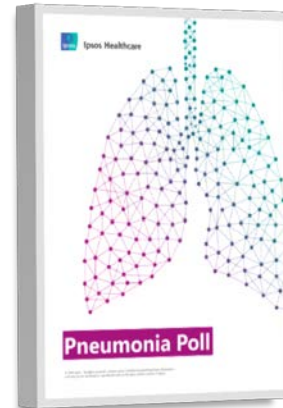
Weighted Total

The PneuVUE® Report

Download a full copy of the report at:

http://www.ipsos-mori.com/pneu-vue_pneumonia_report

- 1 Awareness and perceptions of pneumonia
- 2 Perceived seriousness of pneumonia and levels of concern
- 3 Understanding the impact of pneumonia
- 4 Pneumonia prevention
- 5 Pneumonia vaccine





Adult Pneumonia Vaccine Understanding in Europe

A New View Into Pneumonia

Across Europe,
there is a generally
poor understanding
of pneumonia...



Older adults claim
to know what
pneumonia
is yet...



...less than
a third are
**aware of a
preventable
vaccine...**



...and only around
1 in 6 at higher
risk of pneumonia
have **actually
received a vaccine...**



Only **44%** believe
certain forms of
pneumonia may be
contagious and...

**1 IN 5 DO NOT KNOW
IT IS A LUNG CONDITION.**



Most agree (**92%**) that pneumonia
is a serious illness yet nearly

8 out of 10 older adults do not feel
personally concerned about the risk of catching it.



...though levels of concern almost double for
older friends and family...

**Nearly half believe
that pneumonia 'can only
be treated' (not prevented).**

44%



PNEUMONIA: WHAT YOU NEED TO KNOW



Pneumonia can affect anyone¹ and could even be caught by those who exercise, eat healthily and generally take care of themselves. People are at increased risk if they are aged 65+, if they smoke, drink alcohol to excess, have a weakened immune system, or have chronic medical conditions like **cardiovascular (heart) disease, diabetes, chronic obstructive pulmonary disease (COPD) or asthma**^{2,3,4}

Doctors and other allied health professionals, such as nurses and pharmacists, play an important role in supporting adults to protect themselves against pneumonia. But adults must play a role in addressing pneumonia prevention as part of a healthy approach to ageing.



The PneuVUE® Survey

PneuVUE® (Adult Pneumonia Vaccine Understanding in Europe) is one of the largest pneumonia awareness consumer surveys ever conducted in Europe. The research was conducted in partnership with renowned social science research group, Ipsos MORI and involved **over 9,000 adults aged 50+ across nine key European countries** via 20 minute computer assisted telephone interviews. Total level results have been weighted to reflect the population size of people aged 50 years and above in each market¹, and ensure the sample is nationally representative within market.



Download the Ipsos MORI report at
www.ipsos-mori.com/pneu-vue_pneumonia_report

1 The survey was conducted in the United Kingdom, Germany, France, Portugal, Spain, Italy, Greece, Austria and Czech Republic. Whilst this survey was being conducted, a Pfizer awareness campaign was taking place in seven markets.

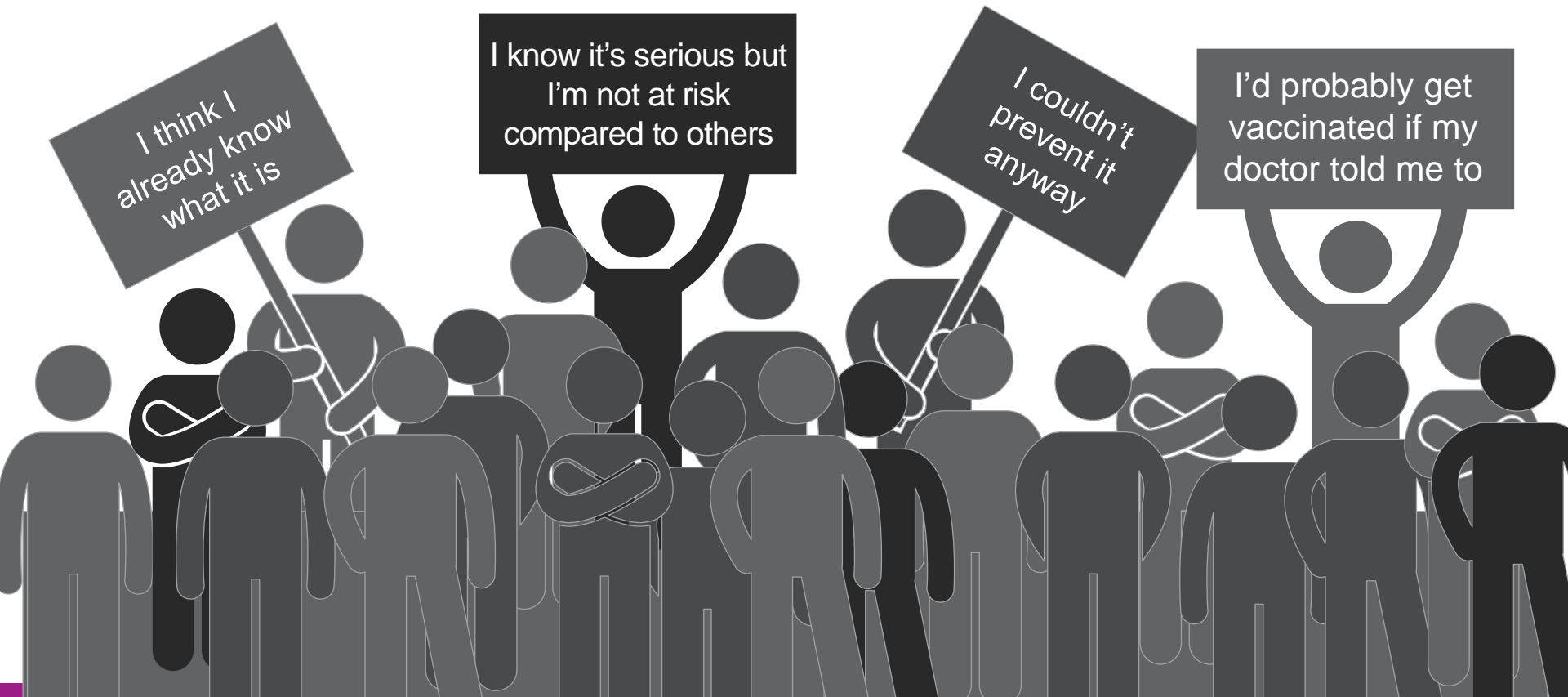
References:

1. Hoare Z and Lim WS. Pneumonia: update on diagnosis and management. British Medical Journal. 2006; 332: 1077-79
2. British Lung Foundation. Pneumonia Available at: <http://www.blf.org.uk/Page/Pneumonia> [Last accessed: 18 Mar 2016]
3. American Lung Association. Pneumonia fact sheet. Available at: <http://www.lung.org/lung-health-and-diseases/lung-disease-lookup/pneumonia/> [Last accessed: 18 Mar 2016]
4. Centers for Disease Control and Prevention (CDC). Pneumococcal disease - Risk factors & transmission. Available at: <http://www.cdc.gov/pneumococcal/about/risk-transmission.html> [Last accessed: 4 March 2016]



PP-PNA-EUR-0403

Fighting pneumonia will involve combatting common misconceptions as well as the disease itself



- **Older adults** – population of adults aged 50 years and above
- **Higher risk (of pneumonia)** – respondents aged 65 and over or 50-64 years with at least one of the following risk factors^{5,8,9}: diabetes, heart disease, a lung condition like COPD or asthma, HIV, weakened immune system, liver disease, organ transplant, cancer, asplenia, smoker
- **Lower risk (of pneumonia)** – respondents aged 50-64 years with none of the above listed risk factors

PneuVUE® countries surveyed

One of the largest pneumonia awareness surveys

involving over 9,000 older adults across nine European countries



Awareness and Perceptions of Pneumonia

*When it comes to pneumonia,
the problem is not with awareness
but with understanding*



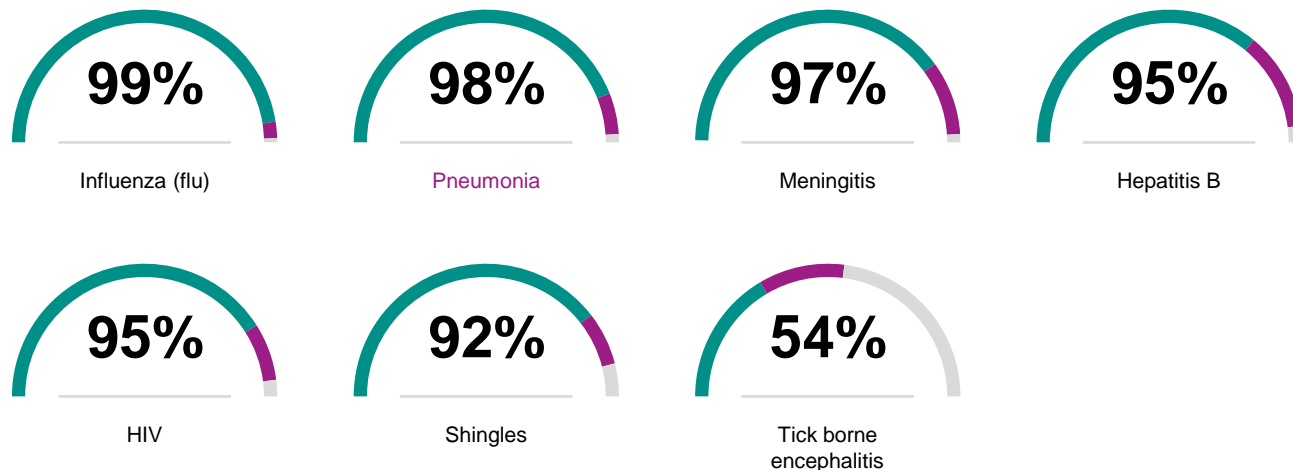
In the context of other diseases tested, awareness of pneumonia is second only to flu

- Those under 65 are more likely to claim they 'know what pneumonia is' (90% vs. 85% of 65+)
- Furthermore, those at 'higher risk' were also less likely to claim they 'know what pneumonia is' (87% vs. 90%)

% aware of disease:

Know what It is I have heard of it but don't know what it is

(% shown = have heard of it but don't know what it is + know what it is)

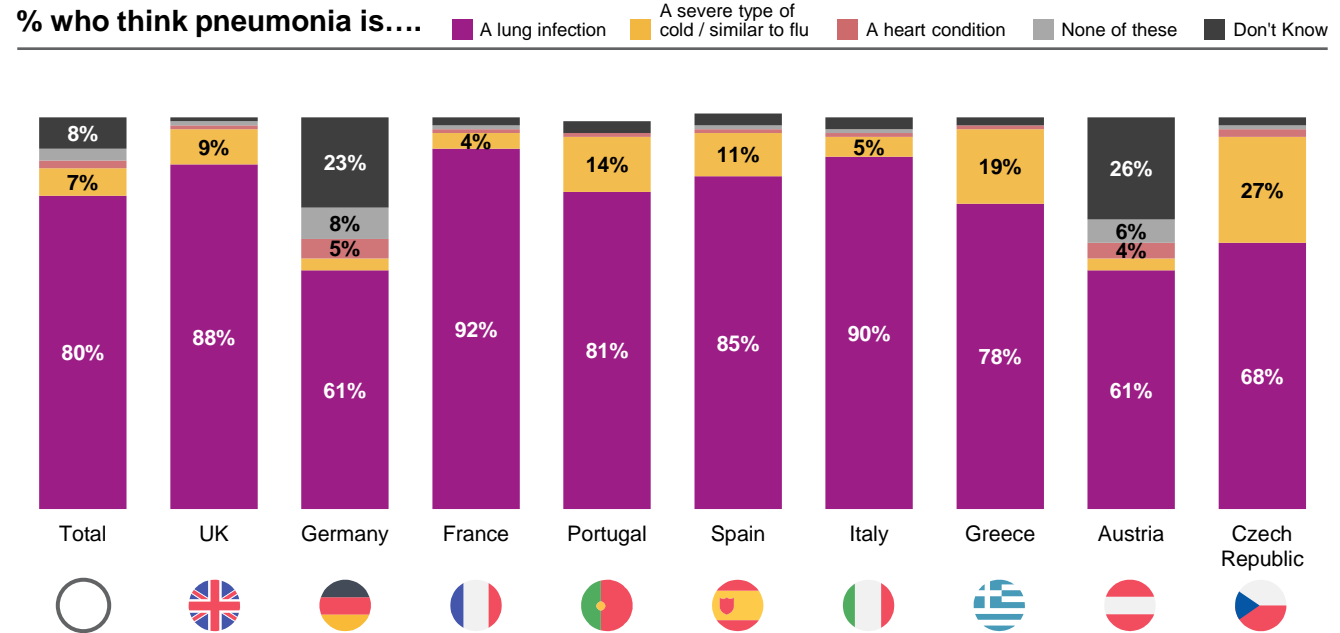


Note: Breakdown by country level included in the appendix

Q2. Which of the options I am about to read out to you, best describes your awareness of the following illnesses and viruses? Base: all respondents (n=9029)

Pneumonia is commonly identified as a lung infection, however 1/5 either don't know or confuse it with something else

- In Germany and Austria there is some confusion over what pneumonia is, with close to a third saying they didn't know, or it to be none of the options presented. In Austria 77% of the sample who have seen promotional materials believe it to be a lung infection compared to only 59% who have not seen any promotional materials
- Those over 65 are less likely to mention Pneumonia as a lung infection (78% compared to 85% of those under 65)



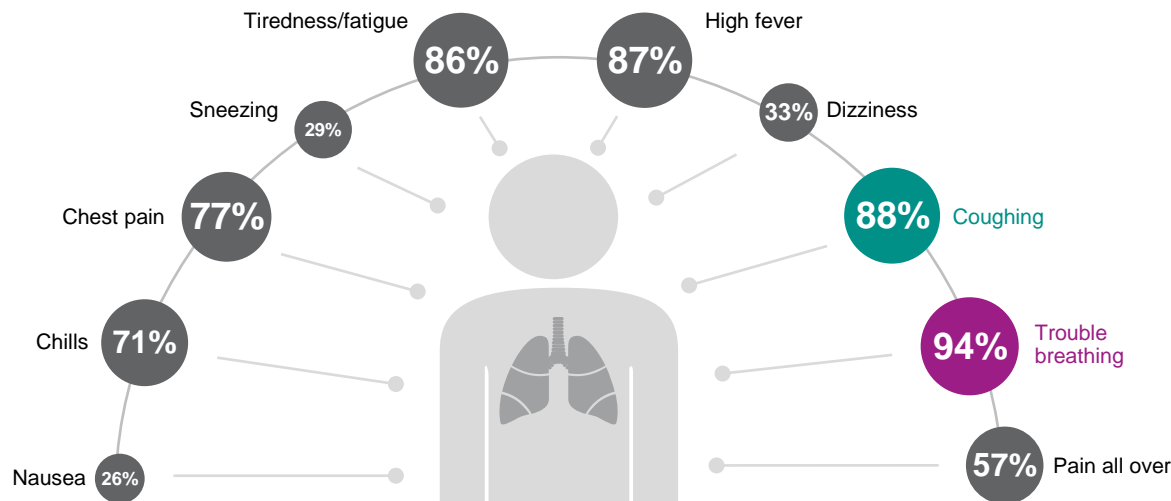
Q12. Which one of the following options I will read out to you best matches your understanding of pneumonia? Pneumonia is... Base: all respondents (Total n=9029, UK n=1000, DE n=1001, FR n=1001, PT n=1001, ES n=1016, IT n=1008, GR n=1000, AT n=1000, CZ n=1002)

In line with its recognition as a lung infection, pneumonia is typically associated with trouble breathing and coughing with lower awareness of less obvious symptoms

- The UK are the most likely to select nausea (35%) – higher than all other markets
- Portugal are also more likely than the other markets to select sneezing (56%)
- Association of dizziness is varied – significantly higher in the UK (43%) and Germany (43%) and significantly lower in Italy, France and Spain (24%–27%)



% associating symptom with Pneumonia:

(% shown = Yes)



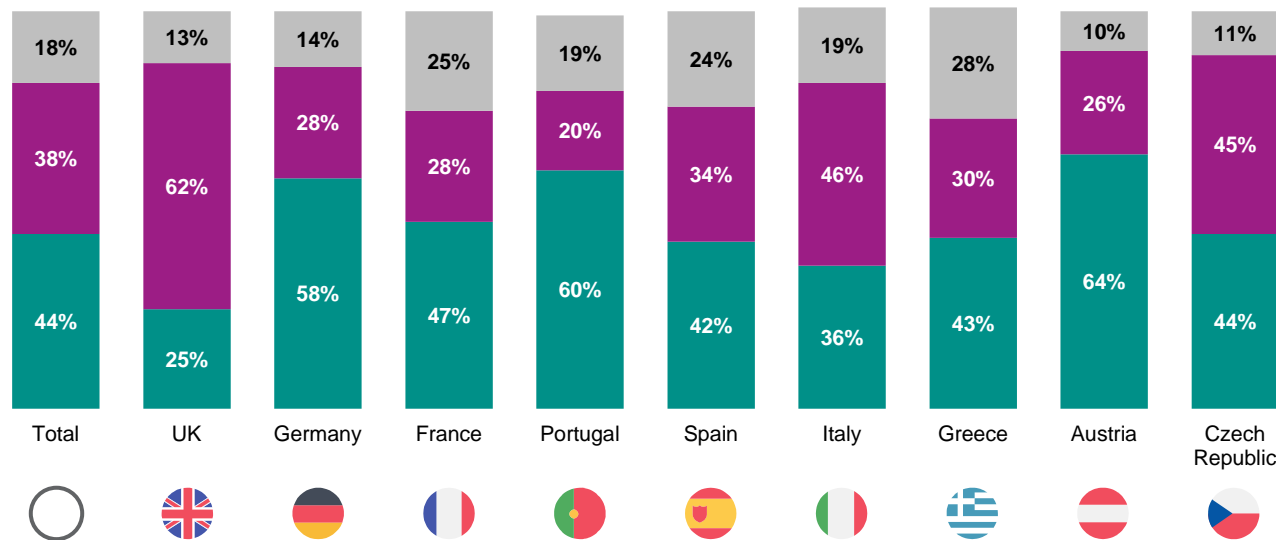
Q13. Which, if any of the following symptoms that I will read out to you, do you associate with pneumonia? Base: all respondents (n=9029)

Opinions are divided as to whether some forms of pneumonia are contagious or not

- Over half of adults in Austria, Portugal and Germany agree that some forms of pneumonia may be contagious (58%–64% in agreement)
- Respondents with a history of Pneumonia are more likely to agree that it 'may be contagious' over those with no prior experience (48% vs 43%) 
- Respondents aware of the vaccine are more likely to agree that forms of Pneumonia may be contagious over those who are generally aware of Pneumonia (48% vs. 41%) 

% who agree/disagree:

Some forms of pneumonia may be contagious, meaning it can easily be passed on from one person to another



Q14. I am going to read out some statements about pneumonia. Please tell me if you think each one is true or false: Some forms of pneumonia may be contagious, meaning it can easily be passed on from one person to another Base: all respondents (Total n=9029, UK n=1000, DE n=1001, FR n=1001, PT n=1001, ES n=1016, IT n=1008, GR n=1000, AT n=1000, CZ n=1002)

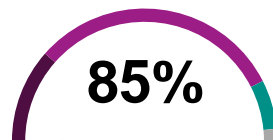
The majority feel only slightly at risk of catching pneumonia with a higher proportion feeling at risk of catching flu

- Looking at those with comorbidities, those with a lung condition (like COPD or asthma) are most likely to say they feel 'very much at risk' of catching pneumonia (32%) followed by those with a weakened immune system (28%)

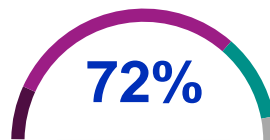
% who feel at risk / not at risk of catching the following illnesses/viruses:

Very much at risk Slightly at risk Not at risk at all Don't Know + no answer

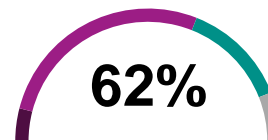
(% shown = slightly at risk + very much at risk)



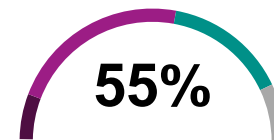
Influenza (flu)



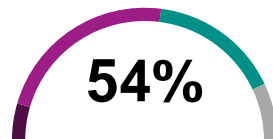
Pneumonia



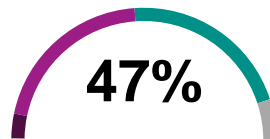
Shingles



Tick borne encephalitis



Meningitis



Hepatitis B



HIV

Note: Breakdown by country included in the appendix

Q10. How much at risk do you consider yourself to be of catching each of the illnesses / viruses I am about to read out? Base: all respondents aware of each illness/virus (Pneumonia n=8869; Influenza n=8952; Meningitis n=8718; Hepatitis B n=8631; Shingles n=8266; TBE n=5489; HIV n=8583)

Just 16% of those with clinical criteria putting them at higher risk of pneumonia consider themselves to be very much at risk



Higher risk adults
(Total)

% who feel at risk / not at risk of catching the following illnesses/viruses:

Very much at risk Slightly at risk Not at risk at all Don't Know + no answer



Note on analysis:

↑ = 'Higher risk adults' (aged over 65 or with one comorbidity (excluding high blood pressure and being overweight) or a current smoker

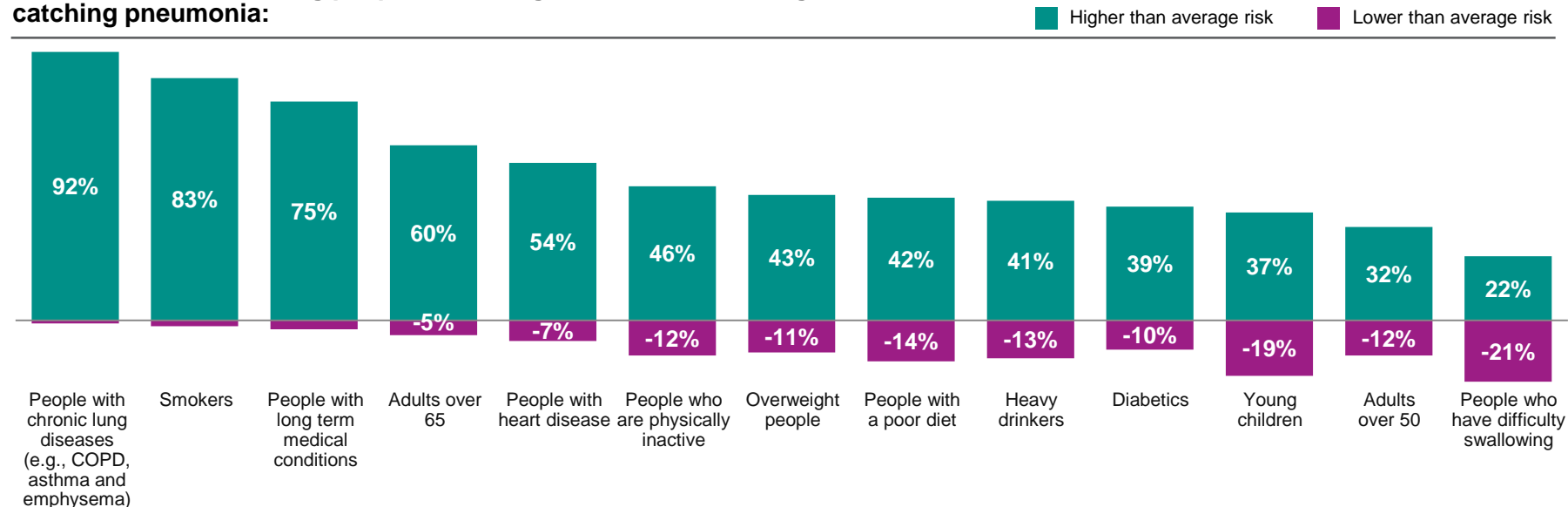
↓ = 'Lower risk adults' are respondents aged under 65 or no comorbidities (except for high blood pressure and being overweight) or a non-smoker

Q10. How much at risk do you consider yourself to be of catching each of the illnesses / viruses I am about to read out? Base: all respondents aware of each illness/virus (Pneumonia n=8869; Influenza n=8952; Meningitis n=8718; Hepatitis B n=8631; Shingles n=8266; TBE n=5489; HIV n=8583)

When considering who is at above average risk, those with lung conditions and smokers are most commonly selected

- Age is felt to play a role but only at the older cut-off point

% who think the following people have a higher/lower than average risk of catching pneumonia:



Q16. I am going to read out a list of different types of people. In your opinion do they have a higher than average, average or lower than average risk of catching pneumonia? Base: all respondents (n=9029)

Perceived seriousness of Pneumonia and levels of concern

Pneumonia is acknowledged to be serious but more something that happens to other people

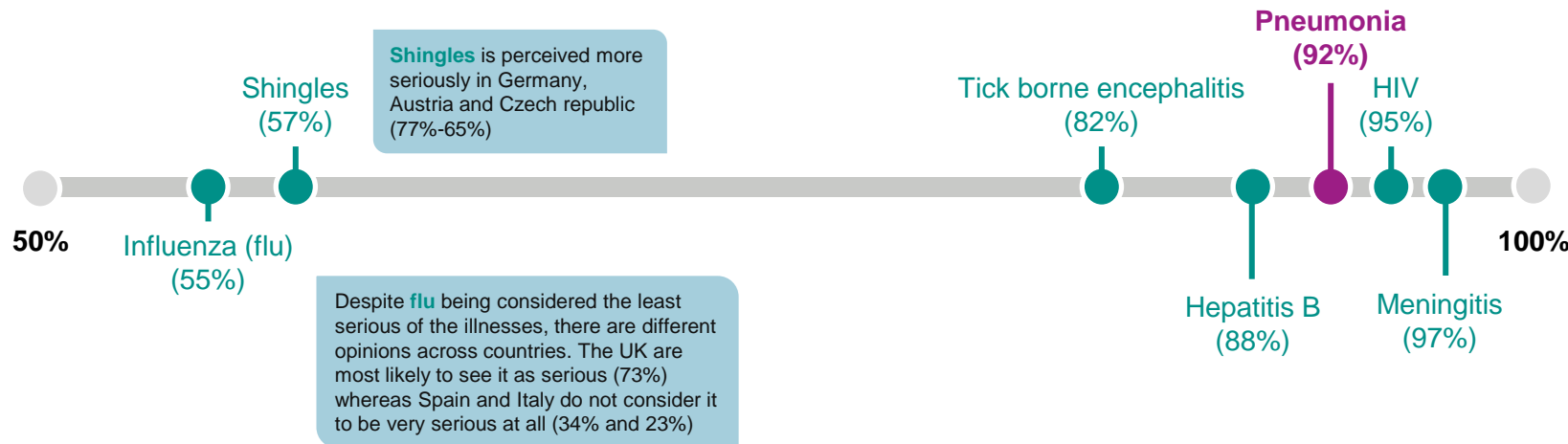


Pneumonia is perceived to be far more serious than flu and only slightly behind meningitis and HIV

- Meningitis and HIV are considered to be the most serious illnesses, with Pneumonia following in third place. Flu is considered to be the least serious

% who consider the illness to be serious:

(% shown = Extremely + rather serious)



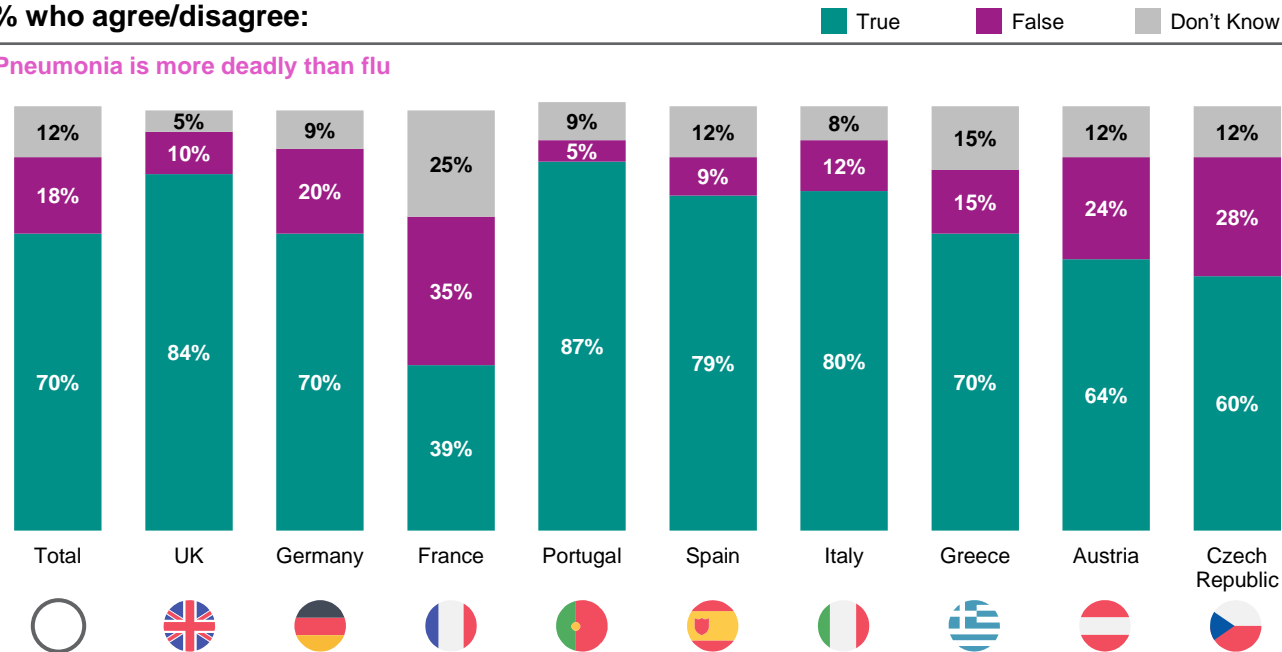
Q9. How serious do you think each of the illnesses I will read out to you is? For each I read please tell me if you consider it to be: Extremely serious, rather serious, not very serious, not serious at all or don't know.
Base: all respondents aware of each illness/virus (Pneumonia n=8869; Influenza n=8952; Meningitis n=8718; Hepatitis B n=8631; Shingles n=8266; TBE n=5489; HIV n=8583)

On the whole, pneumonia is seen as more deadly than flu except for France where opinion is more divided

- Across the markets (except France), at least 60% of adults agree that pneumonia is more deadly than flu
- Opinions are most divided in France where 60% of adults either disagree with the statement or are unsure

% who agree/disagree:

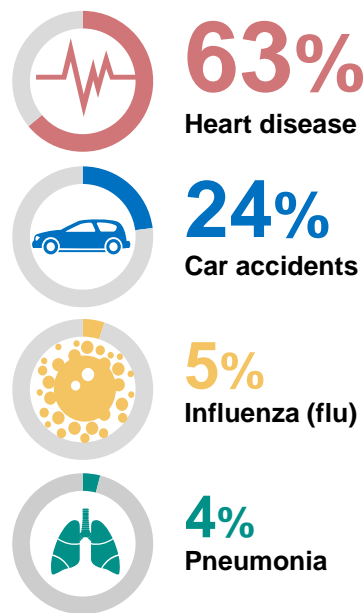
Pneumonia is more deadly than flu



Q14. I am going to read out some statements about pneumonia. Please tell me if you think each one is true or false: Pneumonia is more deadly than flu. Base: all respondents (Total n=9029, UK n=1000, DE n=1001, FR n=1001, PT n=1001, ES n=1016, IT n=1008, GR n=1000, AT n=1000, CZ n=1002)

Despite pneumonia being seen as more serious and more deadly than flu, there is little difference in the proportion thinking it causes the most deaths in their country

% who think the following options cause the most adult deaths:



- While there is some country variation in whether heart disease or car accidents is most common, pneumonia is given a consistently low ranking
- Portugal & Spain are the only countries to rank pneumonia above flu

Proportion of all deaths in 9 markets recorded in 2013: Heart disease 12%, Transport accidents 1%, Pneumonia 3%, Flu <1% Source: Eurostat

Note: Breakdown by country level included in the appendix

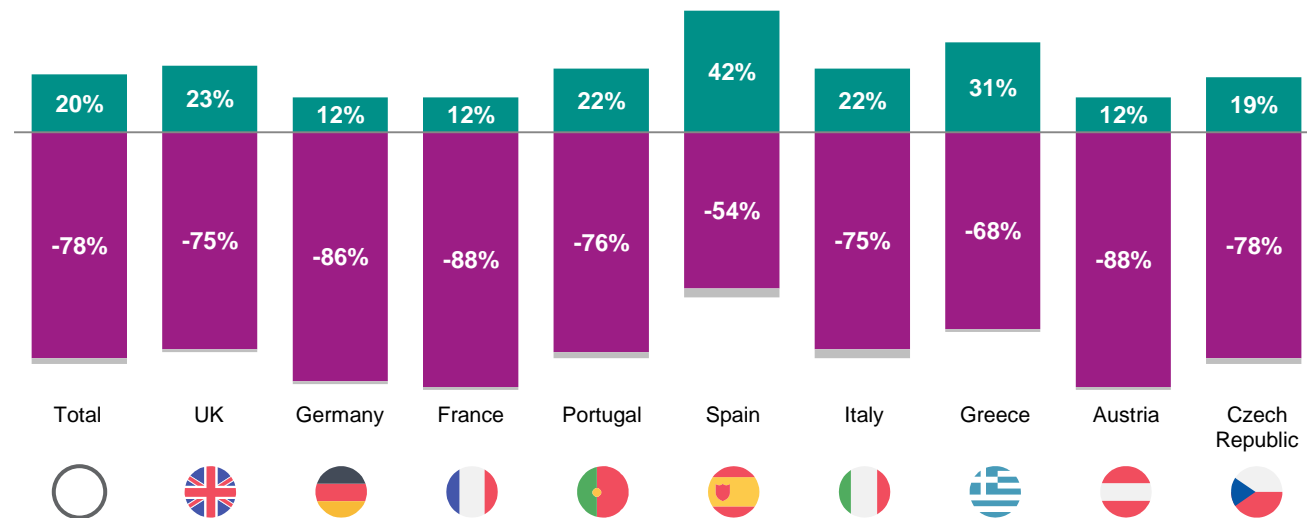
Q11. In your opinion, which one of the following options I will read out to you causes the most adult deaths in your country? [SINGLE CODE] Base: all respondents (n=9029)

Adults are generally not too concerned about the prospect of catching pneumonia themselves

- Respondents with a history of Pneumonia are more likely to be concerned about catching it compared to those with no history of Pneumonia (Top 2 Box 34% vs. 19%); Those with no history of Pneumonia report to be least concerned (Bottom 2 Box 80% vs. 65%)

% concerned / not concerned about catching pneumonia:

Very + Fairly concerned Not very + Not at all concerned Don't Know



Q17. To what extent are you personally concerned or not about the risk of catching pneumonia yourself? . Base: all respondents (Total n=9029, UK n=1000, DE n=1001, FR n=1001, PT n=1001, ES n=1016, IT n=1008, GR n=1000, AT n=1000, CZ n=1002)

Level of concern almost doubles however when thinking about older friends and family creating the impression that pneumonia is seen as something which happens to other people

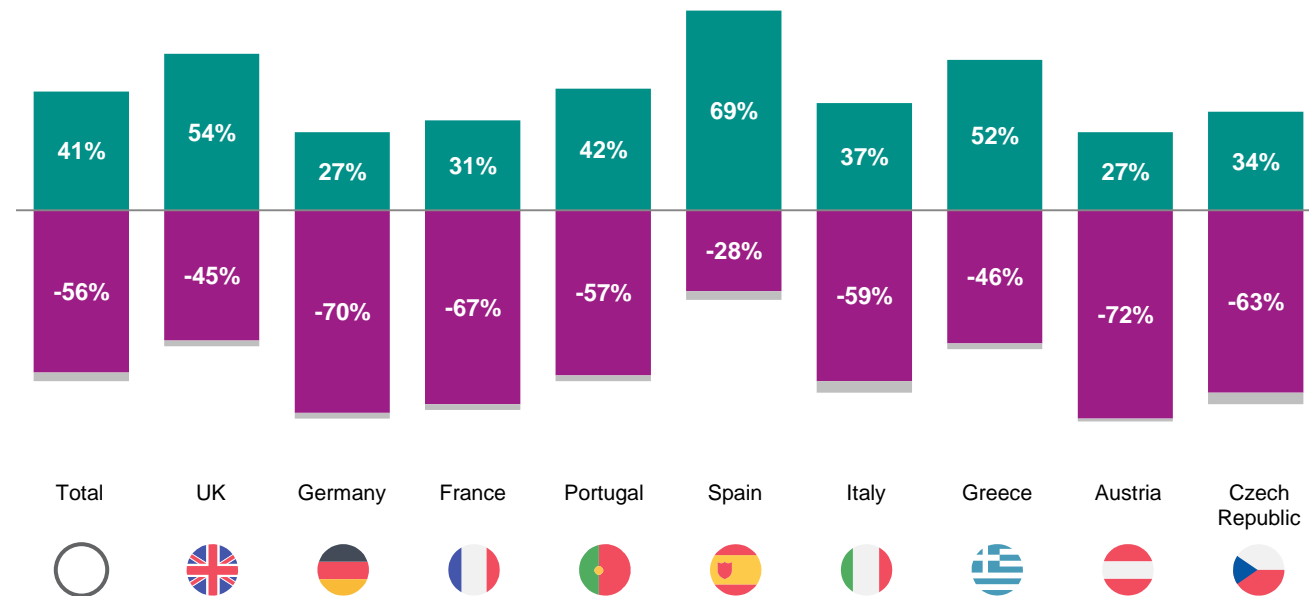
% concerned / not concerned about others catching pneumonia:

Very + Fairly concerned

Not very concerned

Not at all concerned

Don't Know



Q18. To what extent are you concerned, or not about older friends and family catching pneumonia? Base: all respondents (Total n=9029, UK n=1000, DE n=1001, FR n=1001, PT n=1001, ES n=1016, IT n=1008, GR n=1000, AT n=1000, CZ n=1002)

Understanding the impact of Pneumonia

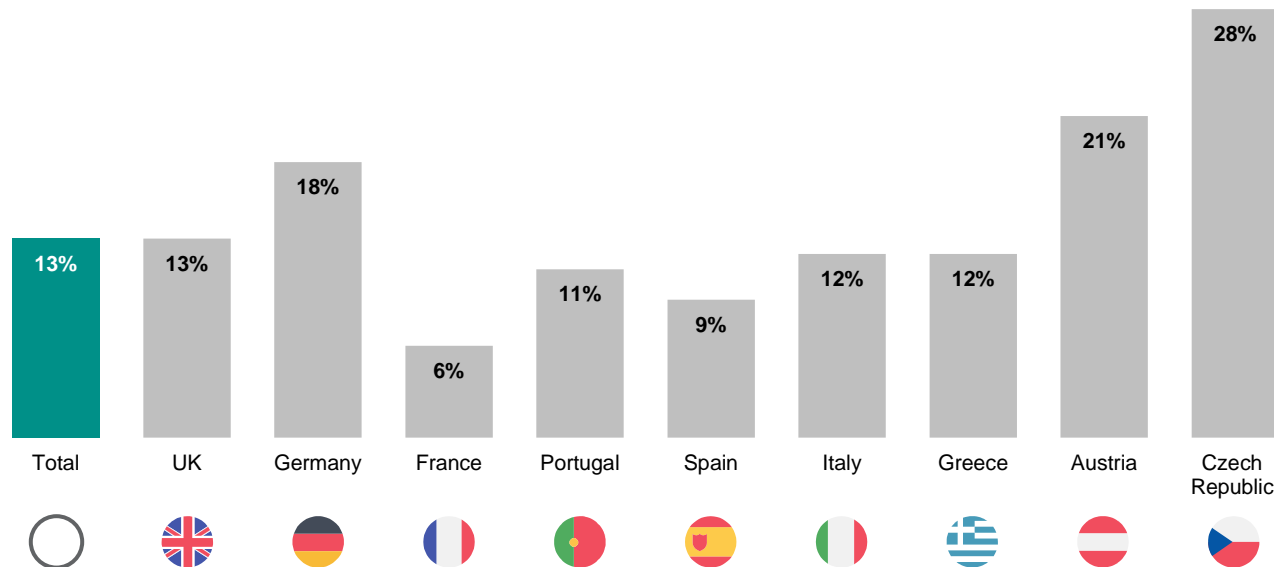
If pneumonia does strike, it tends to be worse than anticipated



13% of older adults claim to have had pneumonia at some point – interestingly, variations in levels across markets do not correlate to variations in the level of concern felt



% of adults who have ever had pneumonia:

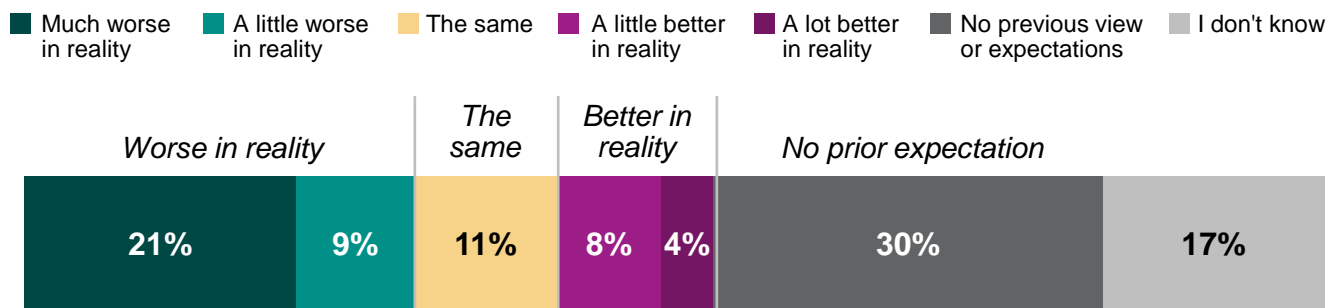


Q34: Have you ever had pneumonia? Base: all respondents (Total n=9029, UK n=1000, DE n=1001, FR n=1001, PT n=1001, ES n=1016, IT n=1008, GR n=1000, AT n=1000, CZ n=1002)

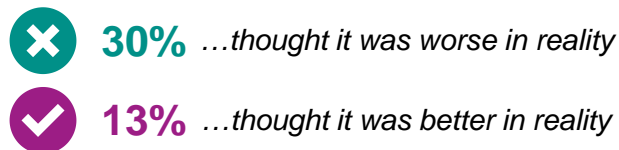
Although 1/3 had no preconceptions of what the disease would be like, for those with a previous view it turned out to be worse in reality

- This picture is fairly consistent across markets although Germany and Austria are more inclined to say that their experience of pneumonia was somewhat better in reality compared to their previous view of what it would be like (18% and 21% Top 2 Box)
- No significant differences are seen between different comorbidities

% who felt their experience of pneumonia was worse / better than expected:



Top 2 Box / Bottom 2 Box scores:



Note: Breakdown by country included in the appendix

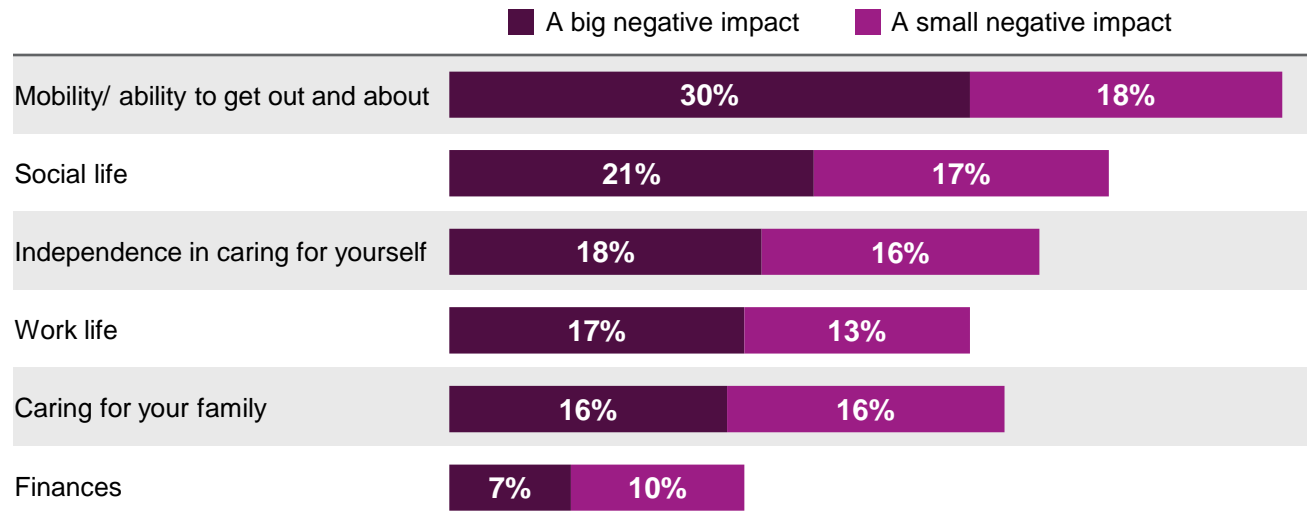
Q43. Based on your experience of pneumonia, how did it compare to your previous view of what it would be like?. Base: all respondents who have had pneumonia (Total n=1322, UK n=131, DE n=185, FR n=59, PT n=112, ES n=96, IT n=120, GR n=123, AT n=214, CZ n=282)

The greatest impact of pneumonia was felt on sufferers' ability to get out and about and their social life. However, it also had negative financial consequences for 1/5

- Respondents aged under 65yrs are more likely to say their Pneumonia had a big negative impact than those aged 65+ (31% vs.24%)



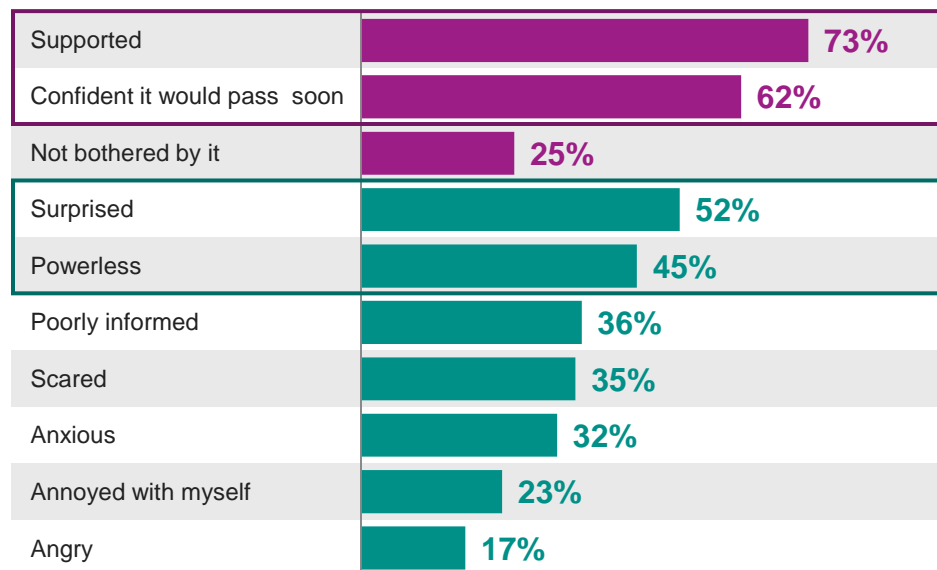
Impact of Pneumonia on Sufferers:



Q44. How much impact did the pneumonia have on the following areas of your life that I will read out? Base: all respondents who have had pneumonia (n=1322)

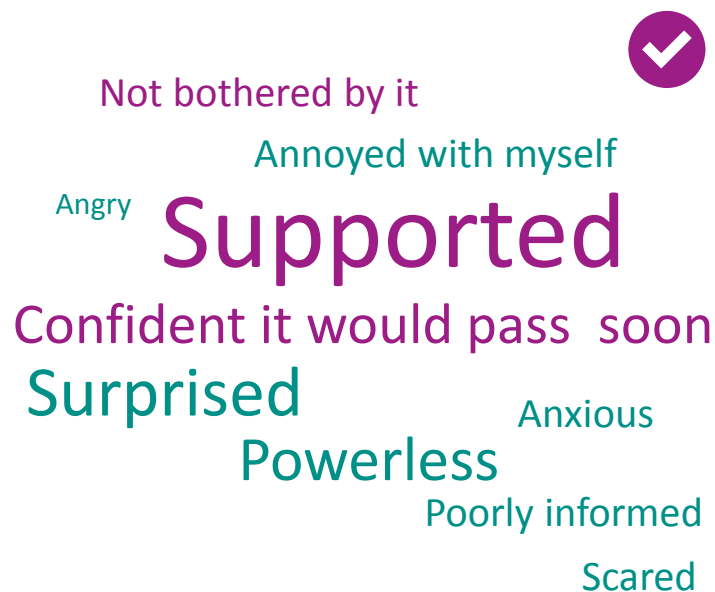
While most adults experiencing pneumonia generally felt 'supported' and 'confident it would soon pass', it also came as a surprise and left many feeling powerless

% who said it applied to them and their experience of pneumonia:



Note: Breakdown by country included in the appendix

Q45: Thinking about how you felt when you had pneumonia, which, if any, of the following apply? Base: all respondents who have had pneumonia (1322)



Pneumonia

Prevention

Vaccination is not commonly seen as an effective means of preventing pneumonia, falling behind simple lifestyle measures



When thinking generally about steps proactively taken to stay healthy, “having all recommended vaccines” comes 4th out of a list of 5 with “eat a healthy diet” the most common response in all markets

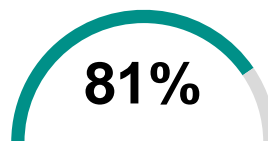
- Adult vaccination generally comes 4th in most markets except in the UK (2nd) Portugal (3rd) and Greece (3rd) where it comes higher and Czech Republic (5th) where it comes in last place
- Those 65+ are more likely to say they seek regular check-ups with a doctor to stay healthy (84% vs. 78% of those under 65)
- Promotional materials have a big impact on vaccination. Of those who have seen 81% get vaccinated compared to only 67% who have not seen materials

% who do the following to stay healthy:

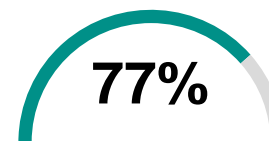
■ Yes, applies to me



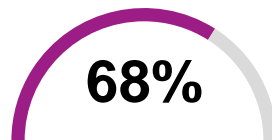
Eat a healthy diet



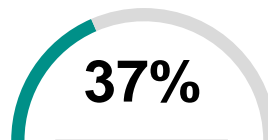
Seek regular check-ups
with my doctor



Exercise regularly



Ensure I have all
recommended vaccinations



Take vitamins

The UK are the least likely to say that seeking regular check-ups with a doctor applies to them (67% vs. >72% in all other markets)

Note: Breakdown by country included in the appendix

Q3. I am going to read out a list of different things that people may do to stay healthy. Please can you tell me if they apply to you. Q3b. Do you currently smoke tobacco? Base: all respondents (n=9029)

Despite this, vaccines are generally trusted and almost all claim to follow their doctor's advice

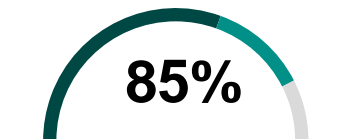
- There is some variation in the level of trust by market with France and Austria being the least likely to agree that they trust vaccines to prevent disease (76%–79% in agreement)
- The results for following Dr's advice is generally consistent across markets

% who agree with the following statements about vaccination:

(% shown = Strongly agree + agree a little)

Strongly agree

Agree a little



I trust vaccines to help prevent infectious diseases



Respondents aged **65+** are more likely to strongly agree they 'trust vaccines to help prevent infectious diseases' compared to those aged under 65yrs (63% vs.59%)



I follow my doctor's advice



Those **vaccinated against pneumonia** are more likely to strongly agree that they 'follow their doctors advice (82%) than those not vaccinated (68%)



Positive statements

Q7. To what extent do you agree or disagree with each of the following statements about vaccination? Do you strongly agree, agree a little, disagree a little, strongly disagree or don't know?

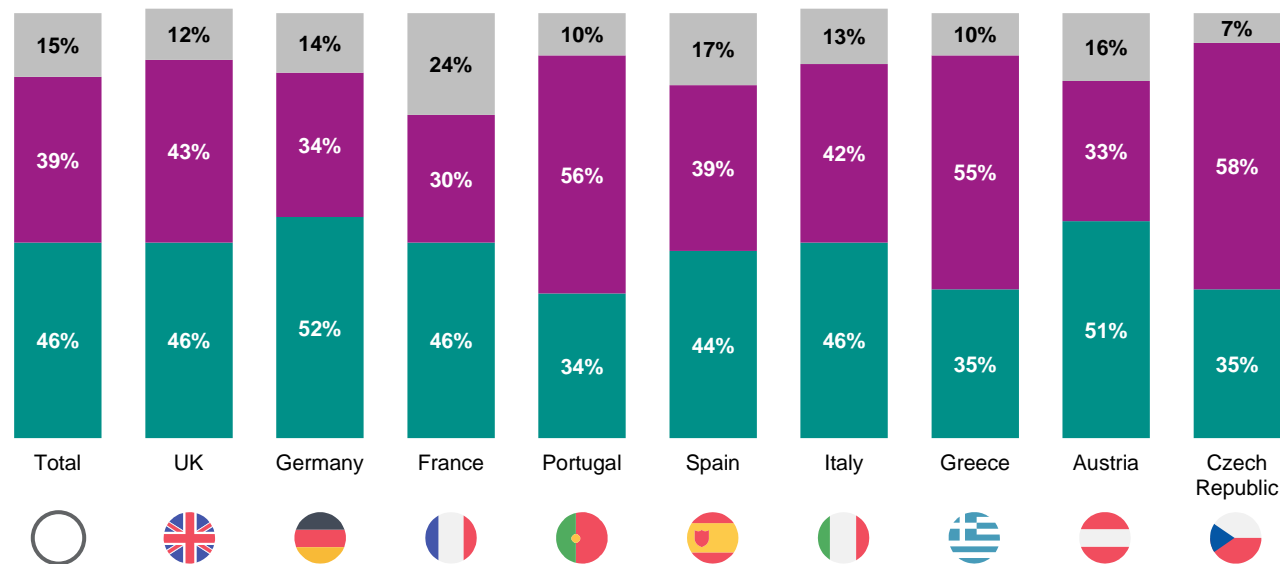
Base: all respondents (n=9029)

Across markets respondents are evenly split as to whether they agree it is true that pneumonia can only be treated and not prevented

% who agree/disagree:

True False Don't Know

Pneumonia can only be treated and not prevented



Q14. I am going to read out some statements about pneumonia. Please tell me if you think each one is true or false: Pneumonia can only be treated and not prevented. Base: all respondents (Total n=9029, UK n=1000, DE n=1001, FR n=1001, PT n=1001, ES n=1016, IT n=1008, GR n=1000, AT n=1000, CZ n=1002)

When thinking specifically about pneumonia prevention, lifestyle measures have more prominence than vaccination

- A significantly greater proportion of adults that have seen promotional materials believe that being vaccinated against pneumonia is an effective prevention (85% vs. 57%)

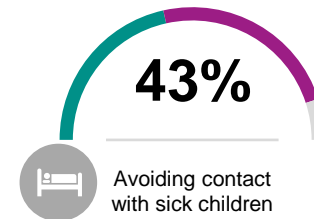
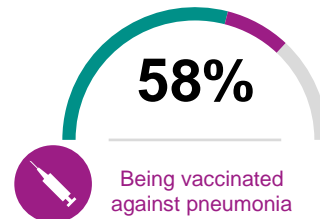
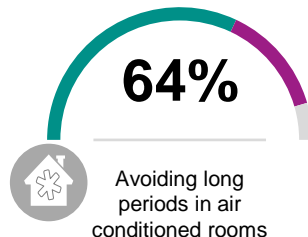
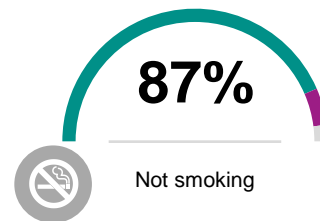
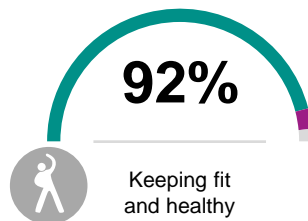
% rating action as effective / not effective:

Top 2 Box:
(Very + slightly effective)

Bottom 2 Box:
(Not at all + not very effective)

Don't Know +
Prefer not to answer

(% shown = Top 2 Box)



Note: Breakdown by country included in the appendix

Q15. In your opinion, how effective or ineffective are the following at protecting against pneumonia? Please answer very effective, slightly effective, not very effective, not at all effective.
Base: all respondents (n=9029)

Pneumonia

vaccination

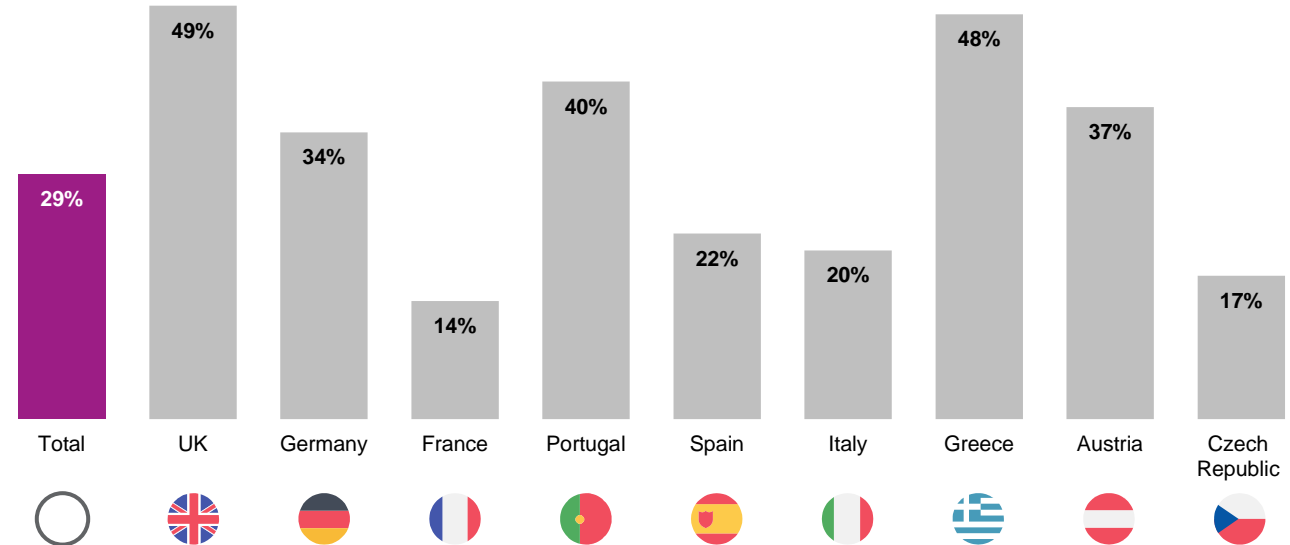
Awareness of the vaccine is low and there is a poor conversion rate from being aware to taking action with even lower levels of vaccination



Awareness of the pneumonia vaccine varies by market but is generally low

- A significantly greater proportion of adults that have seen promotional material are aware of the pneumonia vaccine compared to those that have not (78% vs. 26%)

% aware of pneumonia vaccine:

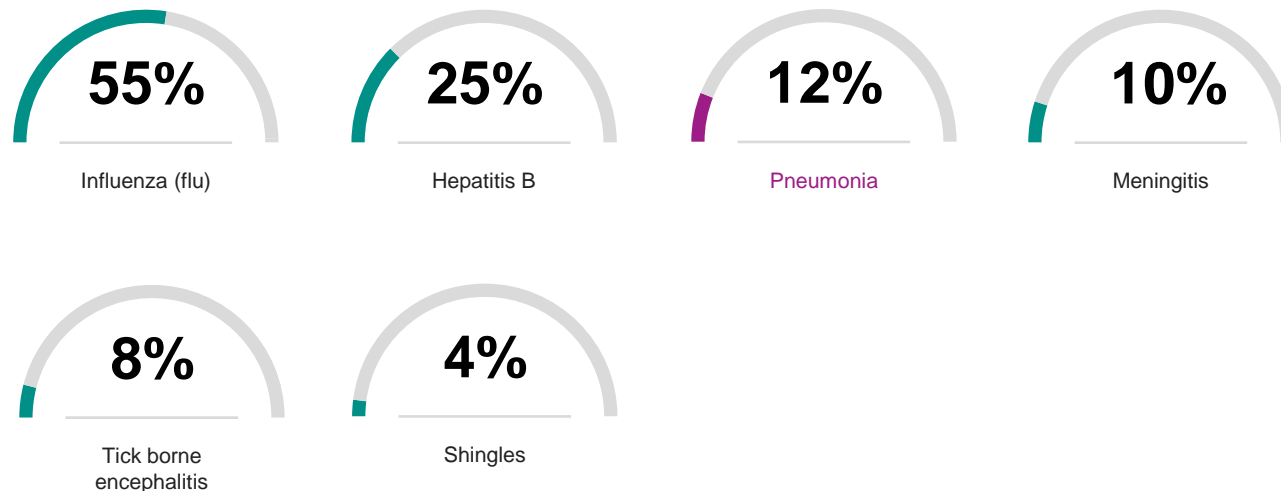


Q26: Did you know that it is possible to be vaccinated against pneumonia? Base: all respondents (Total n=9029, UK n=1000, DE n=1001, FR n=1001, PT n=1001, ES n=1016, IT n=1008, GR n=1000, AT n=1000, CZ n=1002)

Stated levels of pneumonia vaccination are similar to meningitis and far below flu and hepatitis B

% adults vaccinated:

Yes



Self-reported vaccination against TBE is much more prevalent in Austria (62%), Germany (22%) and the Czech Republic (23%). In all other markets, vaccination is less than 2%

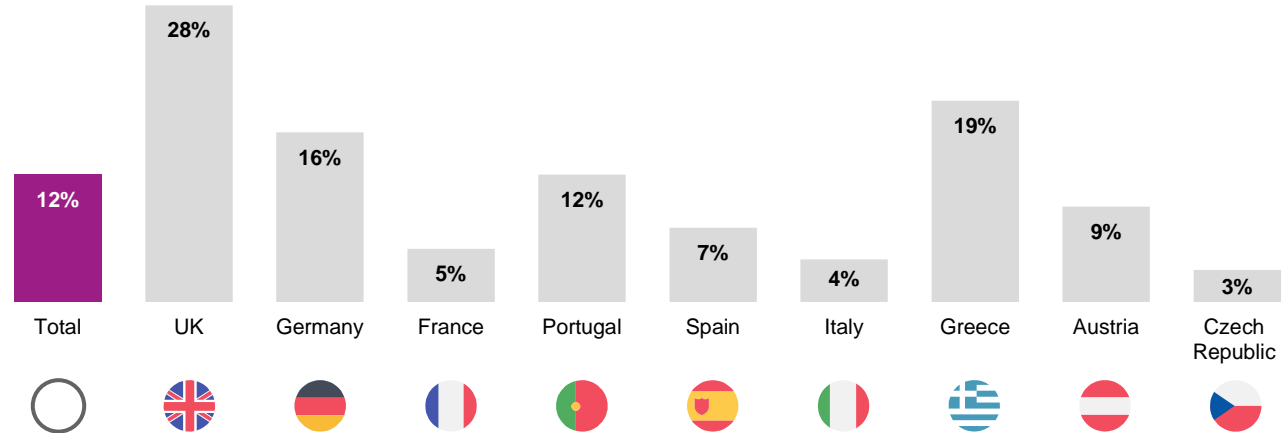


Q19 Have you ever been vaccinated against any of the following? Base: respondents aware of disease (Pneumonia n=8869, Influenza (flu) n=8952, Meningitis n=8718, Hepatitis B n=8631, Shingles n=8266, TBE n=5489)

At a total level, only approximately 1 in 10 have been vaccinated against pneumonia but there is wide variation across countries

- Higher risk adults are more likely to be vaccinated than those who are not (16% vs 3%)

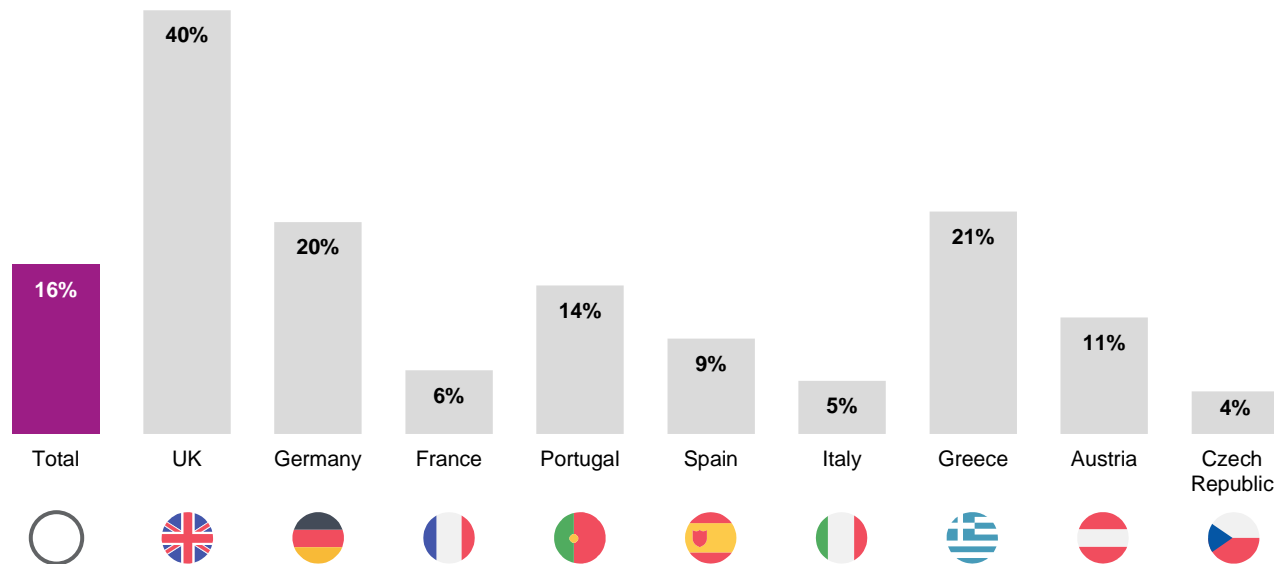
% vaccinated against pneumonia:



Q19 Have you ever been vaccinated against any of the following? Base: respondents aware of disease (Pneumonia n=8869, Influenza (flu) n=8952, Meningitis n=8718, Hepatitis B n=8631, Shingles n=8266, TBE n=5489)

Slightly higher levels are seen in the higher risk group – although the UK stands out with the greatest concentration of pneumonia vaccination in the higher risk group

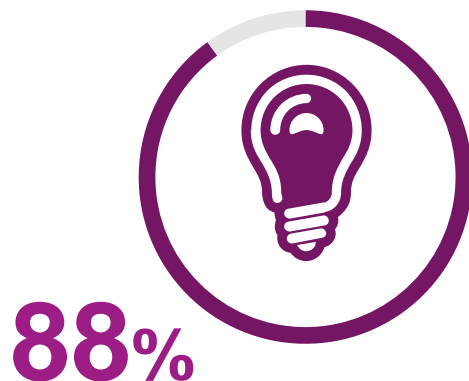
% vaccinated against pneumonia:



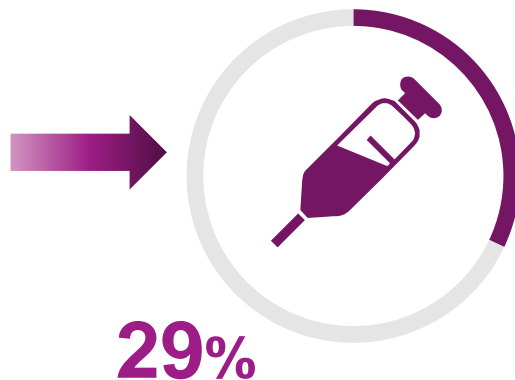
Q19 Have you ever been vaccinated against any of the following? Base: higher risk respondents aware of disease (Pneumonia n=6223, Influenza (flu) n=6288, Meningitis n=6084, Hepatitis B n=6011, Shingles n=5780, TBE n=3769)

Looking at conversion rates we can see the considerable drop off moving from disease awareness to vaccine awareness and then again to actually having the vaccine

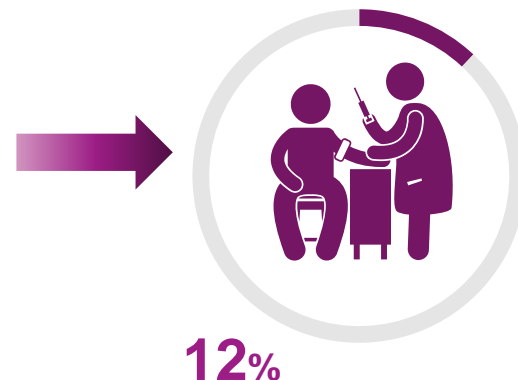
Of the total sample...



Most adults claim to “**know what pneumonia is**”...



...but less than a third are **aware of a preventable vaccine**...



...and only around 1 in 10 have **actually received the vaccine**...

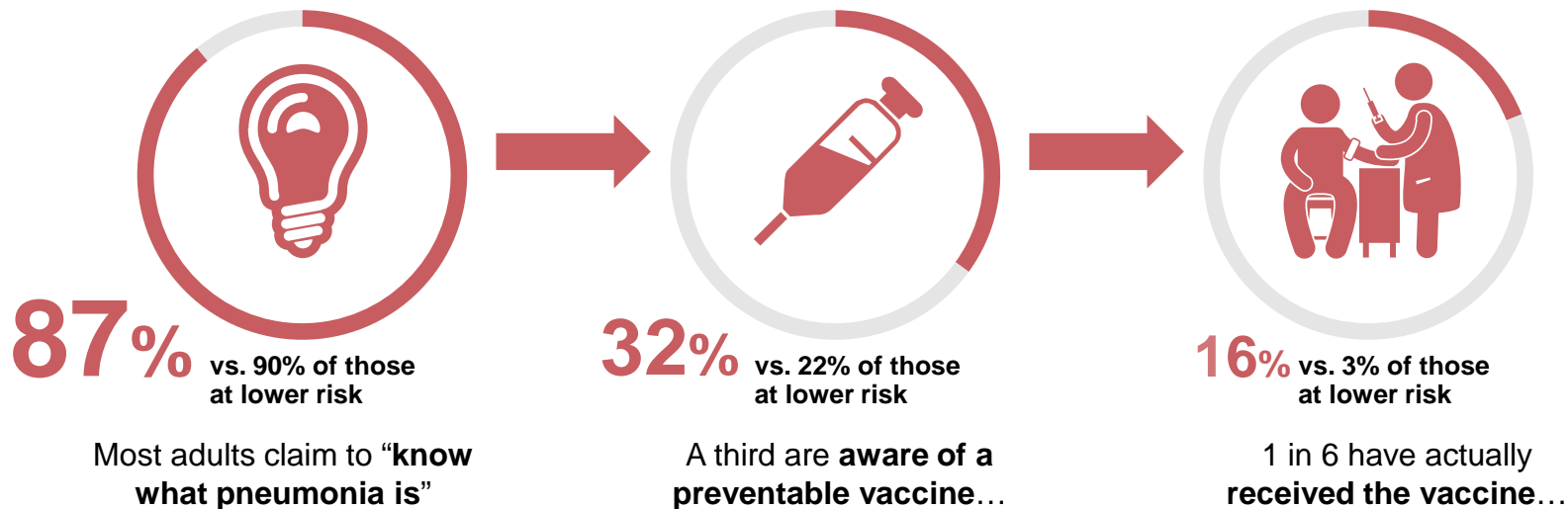
PN: These figures are based on total population so figures may vary slightly in other areas of the report

Note: Breakdown by country included in the appendix

Q2. Awareness of pneumonia. Q19 Have you ever been vaccinated against pneumonia. Q26: Did you know that it is possible to be vaccinated against pneumonia? Base: all respondents (9029)

Even among those at higher risk, only a third (32%) are aware of the vaccine with around 1 in 6 (16%) having had the vaccine

Of the total sample...



PN: These figures are based on total population so figures may vary slightly in other areas of the report

Note: Breakdown by country included in the appendix

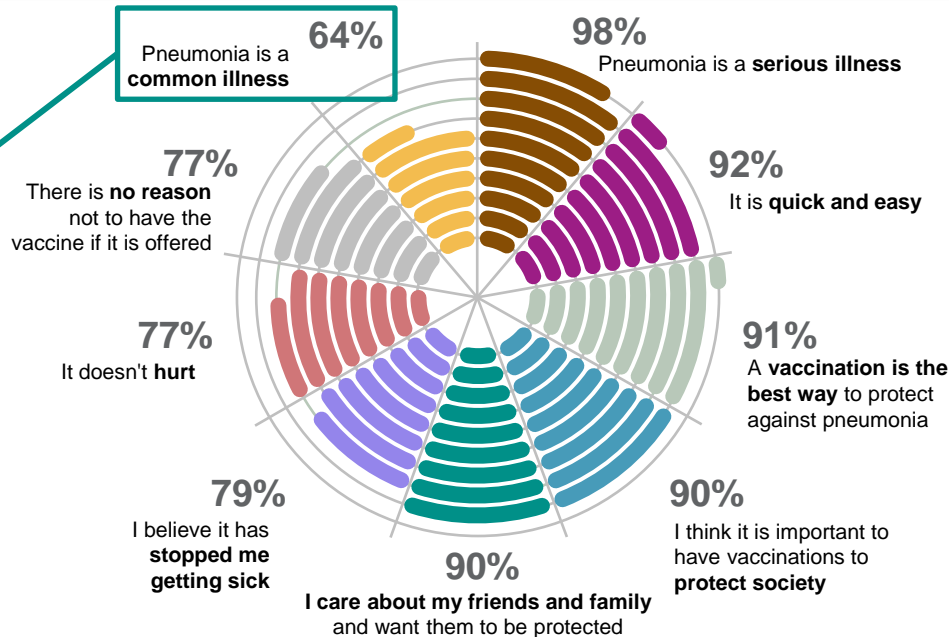
Q2. Awareness of pneumonia. Q19 Have you ever been vaccinated against pneumonia. Q26: Did you know that it is possible to be vaccinated against pneumonia? Base: higher risk respondents (6356)

While the perceived seriousness of pneumonia is the main reason to recommend...

% who selected the statement as a reason for recommendation:

- ...More emotional responses around the desire to protect loved ones and society also feature prominently

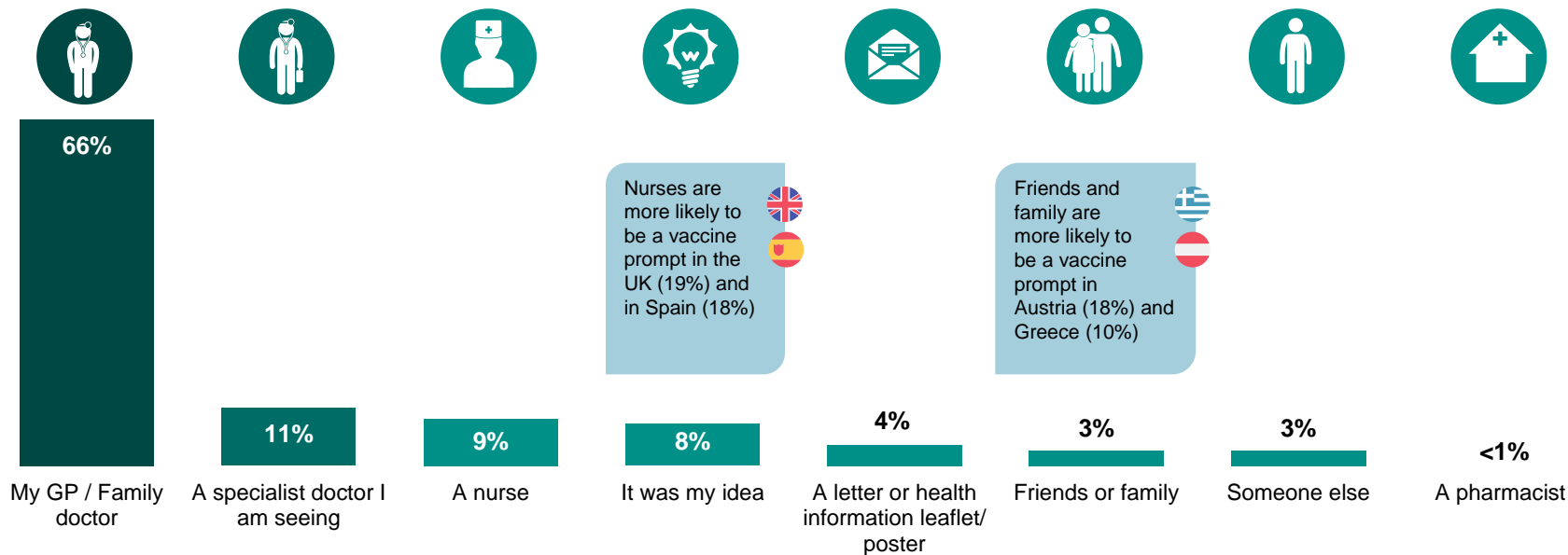
However, "pneumonia is a common illness" has the lowest number of mentions, again reinforcing the sense that it is something that happens to other people



Q23: Why would you recommend the pneumonia vaccine? I am going to read out a list of possible reasons. Please answer yes or not to indicate whether or not they apply to you? Base: respondents who would recommend the pneumonia vaccination based on their experience (n=866)

In 3/5 cases, the decision to have the pneumonia vaccine was prompted by the GP or family doctor, highlighting their importance if vaccination rates are to be raised

% who selected the statement as a reason for recommendation (unprompted response):

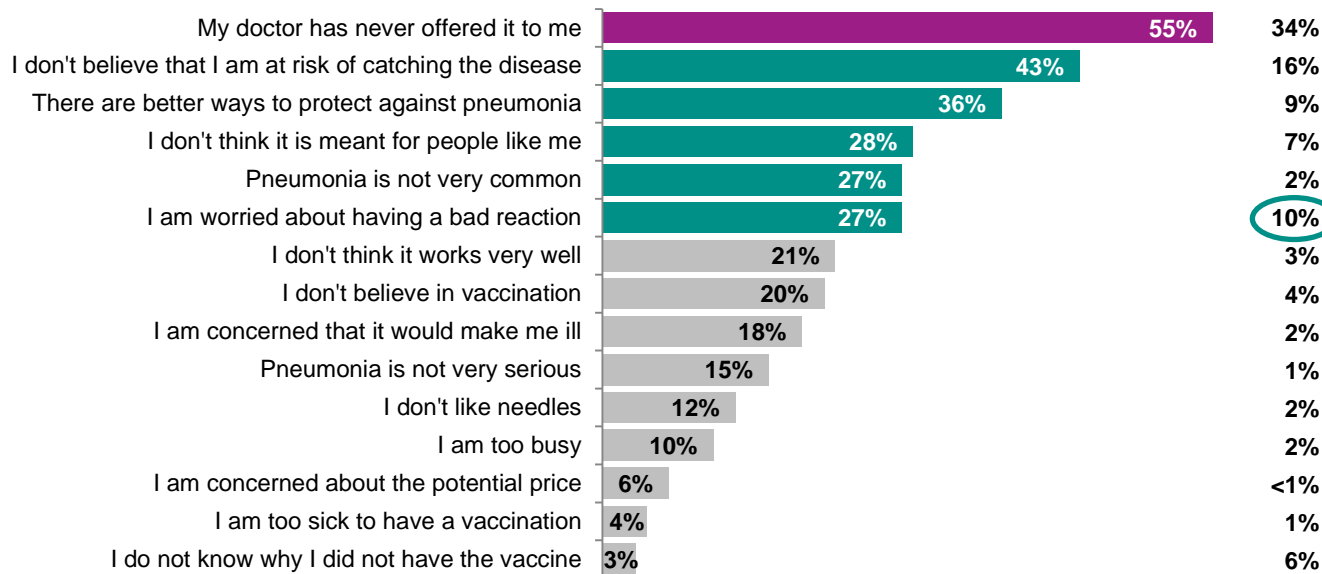


Note: Breakdown by country included in the appendix

Q21. Who prompted you to have a pneumonia vaccine? Base: all those who have had a pneumonia vaccination (n=1024)

This is further reinforced when we look at it from the other angle and see that the top reason for not having the vaccine is it not being offered

Reasons for not getting the pneumonia vaccine (Multiple choice) Main Reason



However, it would be overly simplistic to place all emphasis on HCPs. Lack of understanding of pneumonia, and its prevention in particular, also play an important role

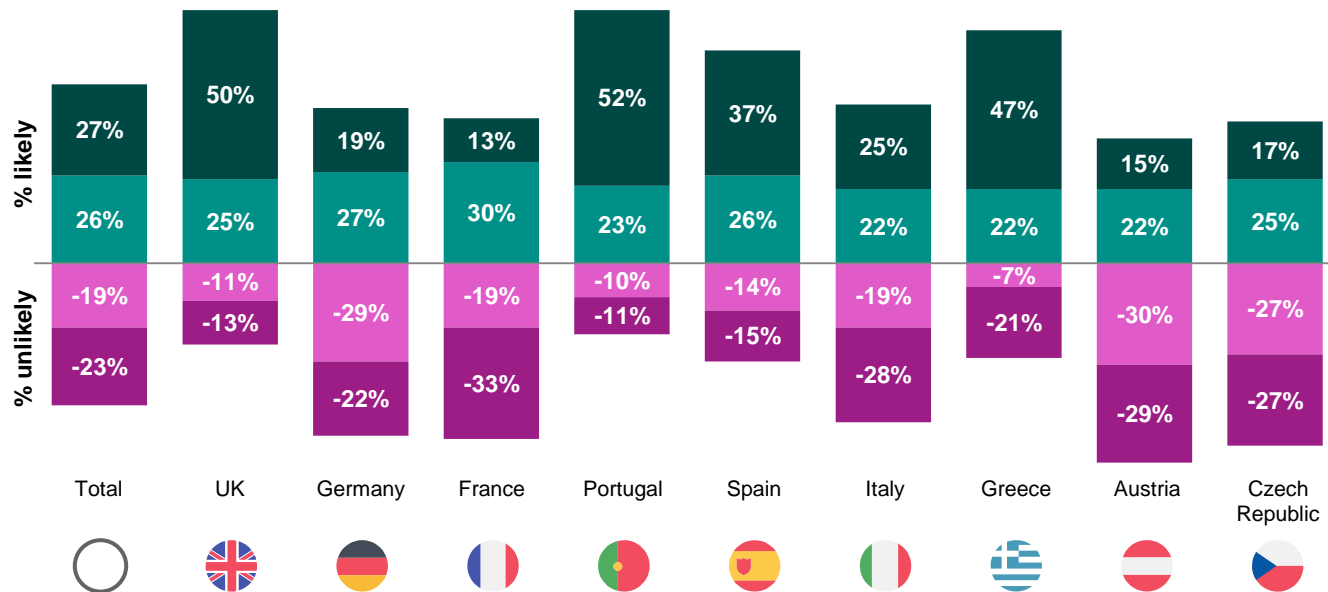
Q27: Which of the following describes why you have not had the pneumonia vaccine? I am going to read out a list of possible reasons [MULTICODE]. Base: Adults aware of the vaccine (1783)

Q28: Which of these is the **main** reason you have not had the pneumonia vaccine? Base: Those who gave a reason for not having pneumonia vaccine (1647)

If the vaccine were recommended by their doctor and free, 53% would be likely to have it, giving vaccination levels a significant boost. This still leaves 1/5 unlikely to follow the recommendation

% who would be likely/unlikely to have the vaccine:

Very likely Somewhat likely Somewhat unlikely Very unlikely



Q29: If a pneumonia vaccine was recommended by your doctor and you did not have to pay for it, how likely would you be to have the vaccine?
Base: respondents who have not had a pneumonia vaccination (7548)

Approximately 1/3 have concerns about vaccination or do not feel in need of them

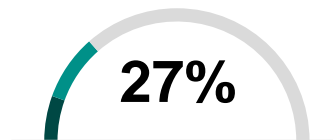
- Avoidance of vaccines for safety concerns or the feeling that vaccines are not for them because they are not at risk, varies by each market
- Avoidance due to safety concerns is most pronounced in Austria where 42% strongly agreed with the statement

% who agree with the following statements about vaccination:

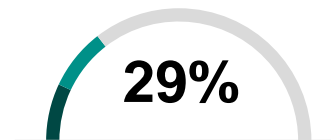
(% shown = Strongly agree + agree a little)

Strongly agree

Agree a little



I try to **avoid vaccines** because I think they are **not safe**



I don't need vaccines because **I don't think I am at risk of getting ill**



Negative statements

Note: Breakdown for other diseases included in the appendix

Q7. To what extent do you agree or disagree with each of the following statements about vaccination? Do you strongly agree, agree a little, disagree a little, strongly disagree or don't know?

Base: all respondents (n=9029)

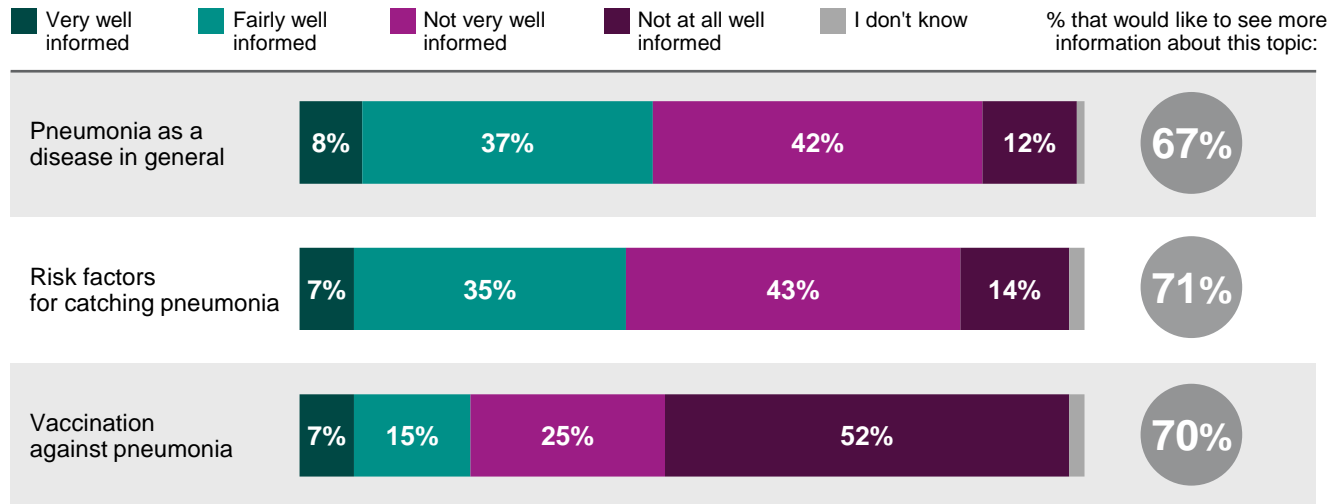
Respondents believe there is a need for more information on all aspects of pneumonia but feel least well informed about pneumonia vaccination

Adults would generally like more information on all topics

- Those who have **not** seen promotional material in the past 3 months are much more likely to say they are not well informed about pneumonia vaccination (80% vs. 32% of those who have seen promotional material)



% who feel informed / not informed about Pneumonia:

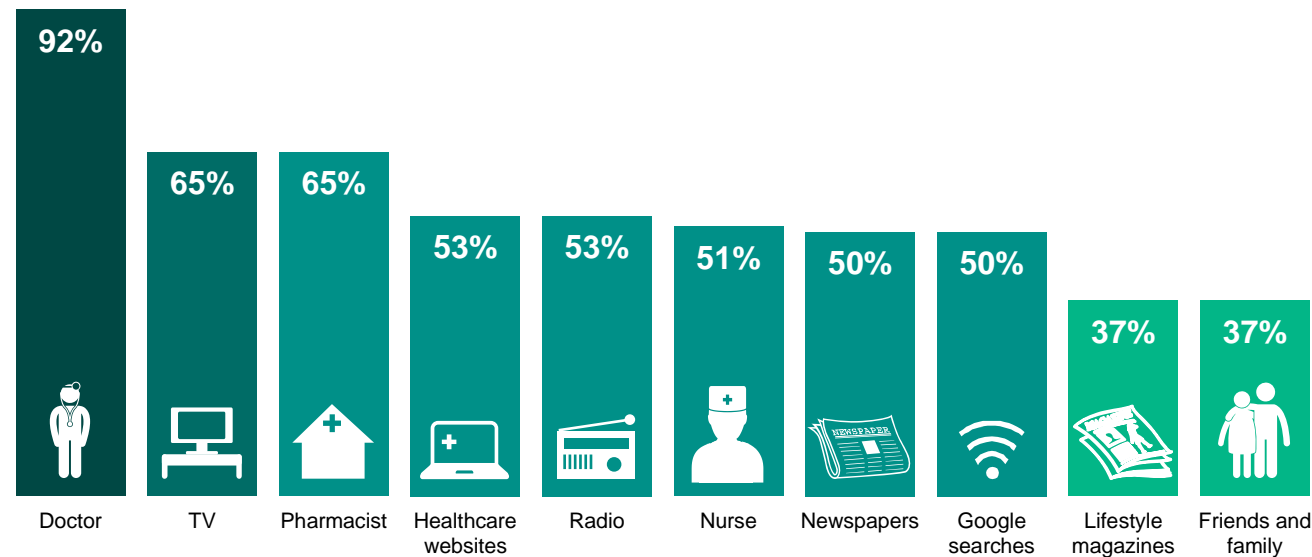


Q31. How well informed do you feel about the following topics? Q32. Which of the following topics, if any do you think people like yourself need more information on? Base: all respondents (n=9029)
Q32. Which of the following topics, if any do you think people like yourself need more information on? Base: all respondents (n=9029)

The doctor is the most popular source of further information, again highlighting the important role they have to play

- However popular media is not dismissed with television, the internet and radio also common choices

% who would like to use the following sources for further information:



Note: Breakdown for other diseases included in the appendix

Q33: Which of the following sources of information would people like yourself like to use to find out more about these topics? Please answer yes or no to the options in the list I will read out.
Base: all respondents who would like more information on pneumonia (n=6829)

Conclusions & Recommendations



You don't
really!



Insight

- Stated awareness of pneumonia is high. However people do not necessarily know as much as they think they do
- Not all are aware it is a lung condition
- Knowledge of some of the less obvious symptoms is limited
- Even though approximately $\frac{1}{2}$ claim to feel informed about pneumonia in general and risk factors, there is still a recognition of the need for more information



Implication

- There is a danger of consumers switching off from a general awareness campaign as they believe they already know what it is
- Focus of communications should be on tackling misconceptions to get people to sit up and take notice
 - In particular, the symptoms of pneumonia, impact on life and level of contagion
- Doctors are an important channel but mass media is also seen as acceptable (e.g. TV, internet, radio)



Insight

- Pneumonia is acknowledged to be a serious condition. However this is quite a vague and abstract concept that is not translating to concern or strong sense of personal risk
- Seen as second only to meningitis and HIV for seriousness and high agreement it is more deadly than flu
- But while deadly, is not felt to cause as many deaths as either heart failure, car accidents or flu
- Most only see a slight risk to themselves and are unconcerned
 - A greater level of concern is felt for older friends and family

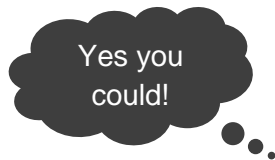


Implication

- Clearer guidance is needed on level of risk and risk criteria, enabling people to more easily tie it back to themselves
- More information is needed on the number of deaths caused by pneumonia and how this compares to other conditions to provide context
- Concern for friends and family is admirable and can be capitalised on to encourage people to become advocates for the vaccination

You may be!

I know it's serious but
I'm not at risk
compared to others



Insight

- Pneumonia prevention is the topic people feel least well informed about and there is evidence of considerable disinformation
- 2/5 don't believe that pneumonia can be prevented as well as treated
- There is a sense that lifestyle measures (e.g. keeping fit and healthy, not smoking and staying warm) are more effective means of protecting against pneumonia than vaccination
- Pneumonia sufferers often felt surprised and powerless
- Awareness of the pneumonia vaccine is generally low



Implication

- Hand in hand with highlighting personal risk needs to be the empowerment of people to take effective steps to prevent pneumonia
- Emphasis the preventable nature of the disease and efficacy of the vaccine particularly in relation to other lifestyle measures
- Attempt to normalise pneumonia vaccination to the same extent as flu
- Work towards incorporating pneumonia vaccination into the health screening checklist for 50+



Insight

- Doctors have an important role to play in prompting pneumonia vaccination and failure to do so is the top reason people haven't had it
- However, even with a doctor recommendation 2/5 would be unlikely to have the vaccine
- Additional barriers to overcome include lack of perceived risk and believing there are better ways to protect against pneumonia
- But those who have had it appear satisfied and would recommend it



Implication

- Doctors need to be encouraged to not just offer the vaccine but actively promote it and be made aware that time may be needed to convince patients
- Tools should be developed to help them explain the level of risk and efficacy of the vaccine
- Efforts shouldn't be focused purely on physicians. Consider encouraging those who have had the vaccine to discuss their experiences with others and prompt them to raise the topic with their doctors

Would you really?

I'd probably get vaccinated if my doctor told me to...



About PneuVUE®



Methodology

- Quotas were set for age, gender, region and economic status in order to collect a nationally representative sample of adults aged 50 in each market.
- The quantitative fieldwork was conducted between 23rd November and 15th February.
- A total of 9029 were surveyed across 9 EU markets.

Weighting:

The results have been weighted to ensure they are representative of the over 50 population in 9 EU markets.

The total figure has also been weighted to reflect country population size.


- Note on analysis: 'higher risk adults' are respondents aged over 65 or with one comorbidity (excluding high blood pressure and being overweight) or a current smoker. Comorbidities = diabetes, heart disease, a lung condition like COPD or asthma, HIV, weakened immune system, liver disease, had an organ transplant, cancer and asplenia (both at risk and high risk). From the total sample of 9029 adults participating, 6356 matched this criteria (70%).



Fieldwork Dates
November 2015 –
February 2016



**CATI (computer assisted
telephone interviews)**
20-minute interviews


 **Total** n=9029

 **UK** n=1000

 **Germany** n=1001

 **France** n=1001

 **Portugal** n=1001

 **Spain** n=1016

 **Italy** n=1008

 **Greece** n=1000

 **Austria** n=1000

 **Czech Republic** n=1002

The PneuVUE® Report

Download a full copy of the report at:

http://www.ipsos-mori.com/pneu-vue_pneumonia_report

- 1 Awareness and perceptions of pneumonia
- 2 Perceived seriousness of pneumonia and levels of concern
- 3 Understanding the impact of pneumonia
- 4 Pneumonia prevention
- 5 Pneumonia vaccine

