

YouthView

Spain report

May 2018

Prepared for Pfizer
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Background, sample & methodology

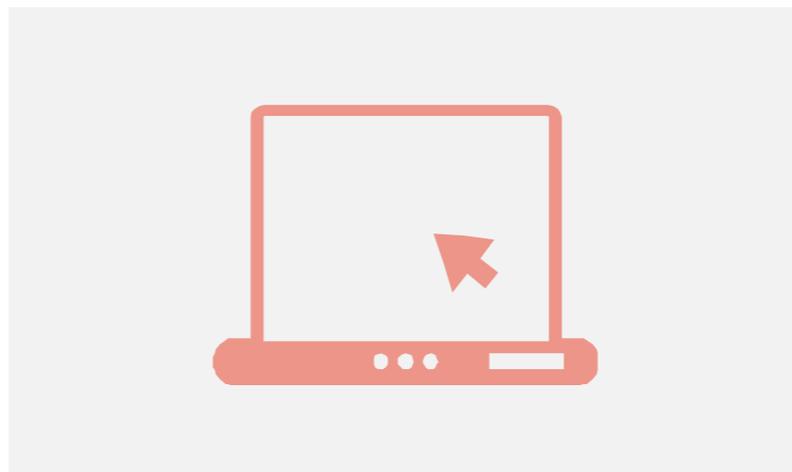
Background, sample & methodology

Business context

The Pfizer vaccines team commissioned Ipsos to conduct primary market research to assess the behaviour linked to meningitis risk factors of adolescents and young adults in key European markets

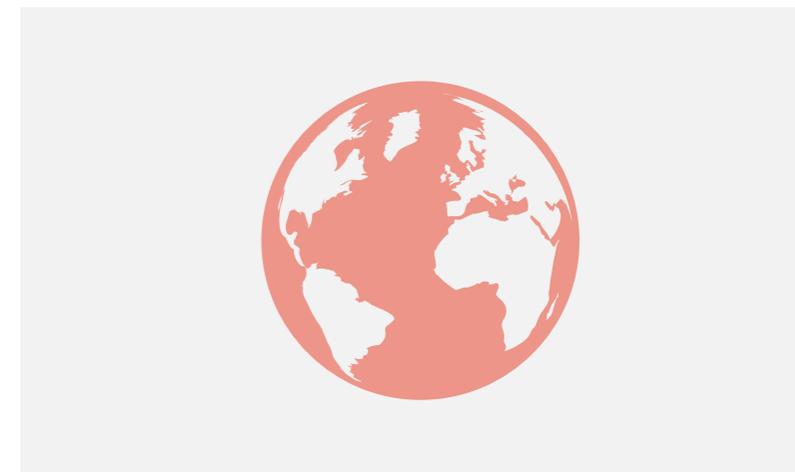
Research objectives

- Measure awareness and perceptions of meningococcal meningitis among adolescents, young adults and parents
- Identify the type of social activities and frequency of engagement in them among adolescents and young adults
- Measure the level of association between social activities and the risk of contracting meningococcal meningitis
- Measure awareness, knowledge and coverage of vaccination



Methodology

The research focused on adolescents, young adults and parents. Participants completed an 15-minute online survey. Participants were recruited from access panels and interviews were carried out between February-March 2018



Sample

- Adolescents (aged 15-17 years old): **n=300**
- Young adults (18-24 years old): **n=300**
- Parents of adolescents/young adults aged 15-24: **n=340**

Quotas were imposed to ensure national representation based on age, gender and region. Corrective weights have been applied to bring the sample in line with the population profile

This report highlights the key findings from Spain

Main findings

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Main findings

Meningitis concern is lowest among young adults

- Awareness of meningococcal meningitis is **lower than other diseases** and only one third of young adults state it is life threatening
- Only around one third of adolescents and young adults **believe their age group is at higher risk** than the average population of contracting meningitis
- Over one third of adolescents and young adults aware of meningococcal meningitis, are **not personally concerned** about catching it

Many social activities are not associated with risk

- Many adolescents and young adults frequently participate in activities that are associated with a **higher than average risk** of contracting meningitis
- However, most adolescents and young people **do not associate** many of the activities they engage in with a higher than average risk of contracting meningitis

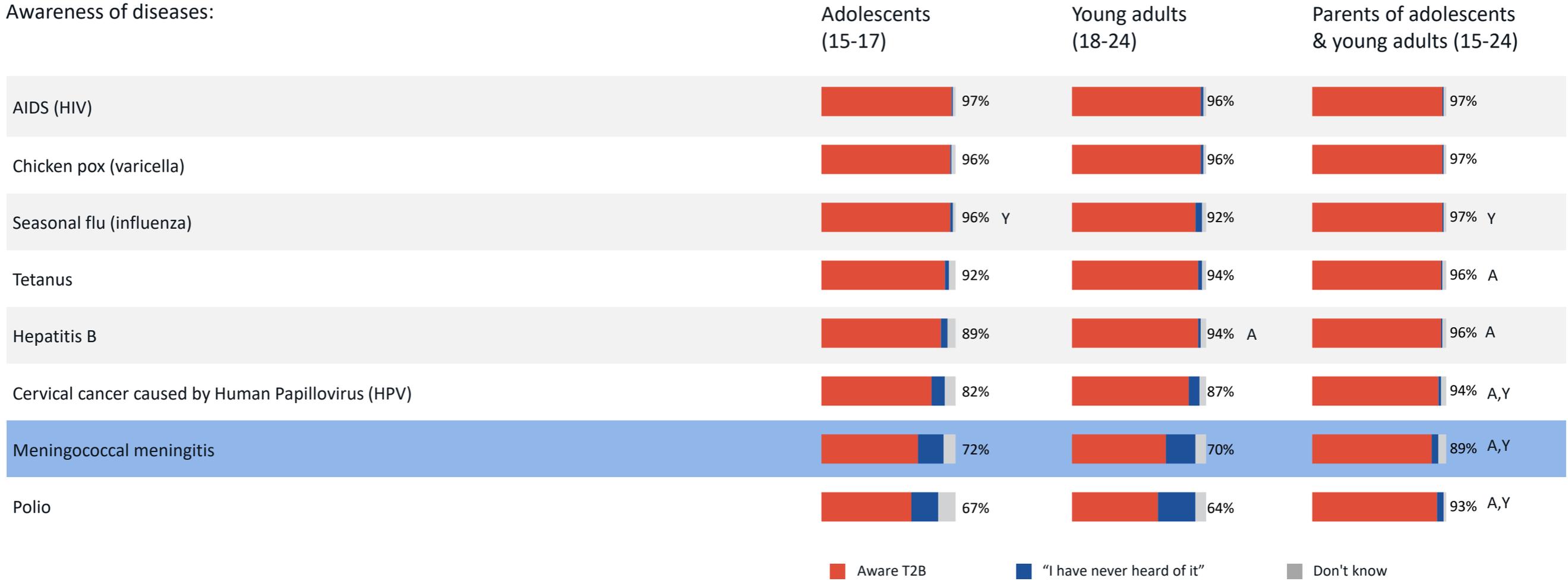
Vaccination coverage and understanding is lower for meningitis

- In comparison to other diseases, the perceived level of vaccination against meningitis is **lower than other diseases**
- Amongst those that stated they think they have not been vaccinated against meningitis, only a **minority have considered it**

Awareness and perceptions of meningococcal meningitis

In the context of other diseases, awareness of meningococcal meningitis is lower than other diseases in Spain. This relative level of awareness is similar across the three groups

Awareness of diseases:

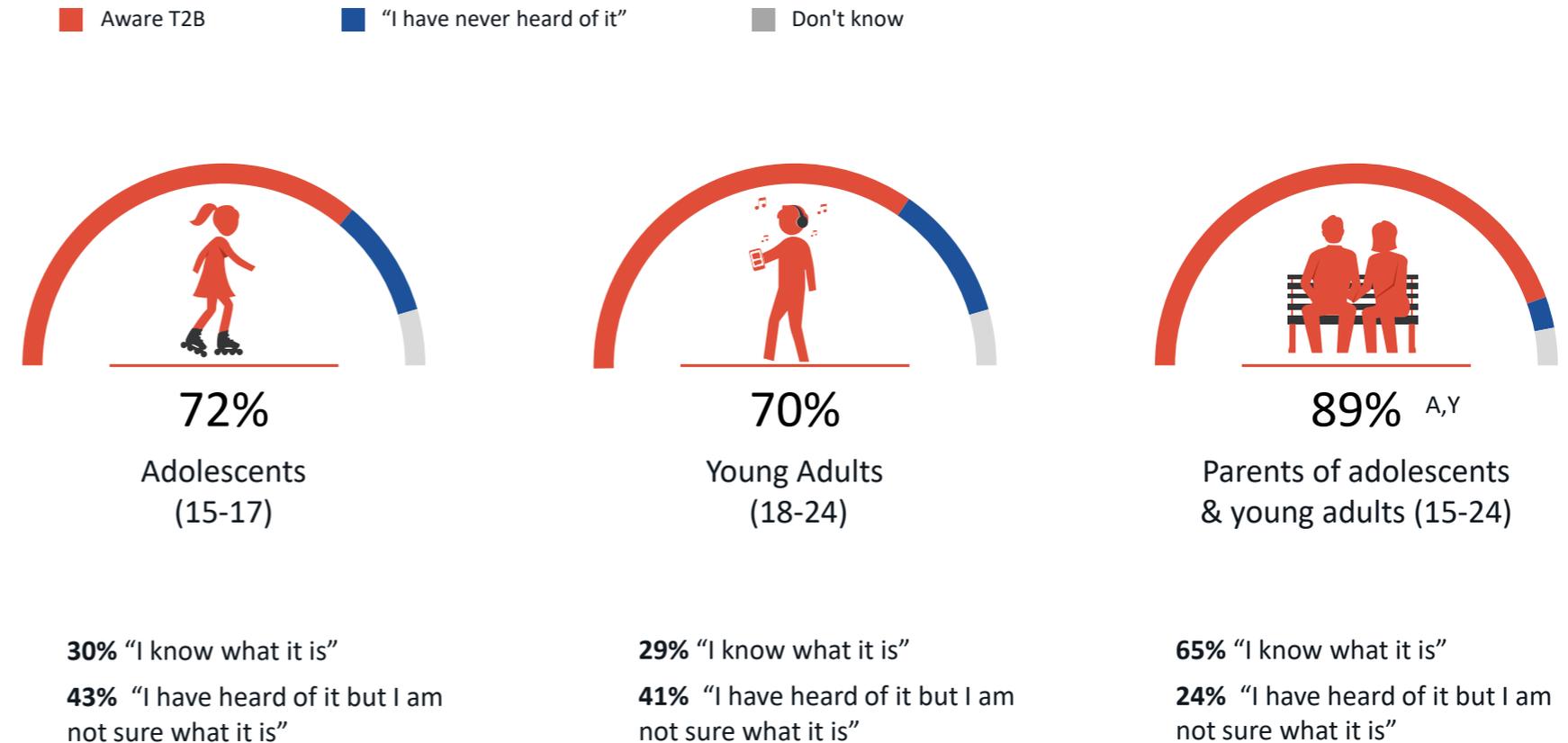


Q15. Which of the options below best describes your awareness of the following diseases: "I have never heard of it", "I have heard of it but don't know what it is", "I know what it is", "Don't know", "Prefer not to answer" Base: all respondents (n=940) ; Adolescents (15-17 years) (n=300) ; Young Adults (18-24 years) (n=300) ; Parents of adolescents & young adults (15-24) (n=340) A, Y, P = statistically significant difference between groups at 95% CI (A=adolescents, Y=young adults, P=parents)

However, awareness of meningococcal meningitis is significantly greater among parents than adolescents and young adults

- Significantly greater awareness amongst:
 - Parents with 1 child (92%) vs. 2 or more children (84%)
 - Female young adults (76%) vs male young adults (64%)
 - Female parents (94%) vs male parents (83%)

Awareness of meningococcal meningitis:



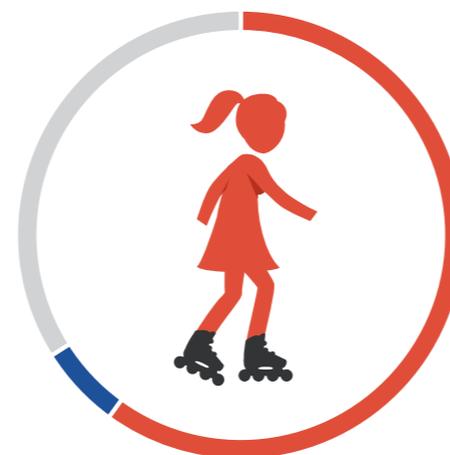
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Meningococcal meningitis is correctly identified as a life threatening condition by almost two thirds of adolescents and parents, but only one third of young adults agree with this statement

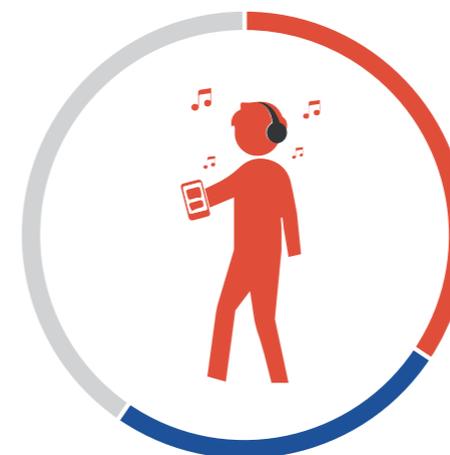
- Significantly greater agreement amongst:
 - Female young adults (43%) vs. male young adults (24%)
 - Female parents (72%) vs. male parents (58%)

Agreement with the statement:

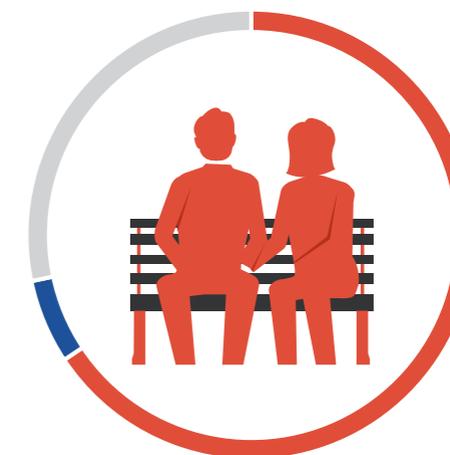
“Meningococcal meningitis is a life threatening infection”



60% ^Y
Adolescents
(15-17)



34%
Young Adults
(18-24)



65% ^Y
Parents of adolescents
& young adults (15-24)

True False Don't Know

Q20. Please indicate which of the following statements you think is true or false. Base: Aware of Meningitis (n=725) ; Adolescents (15-17 years) (n=217) ; Young Adults (18-24 years) (n=210) ; Parents of adolescents & young adults (15-24) (n=298) A, Y, P = statistically significant difference between groups at 95% CI (A=adolescents, Y=young adults, P=parents)

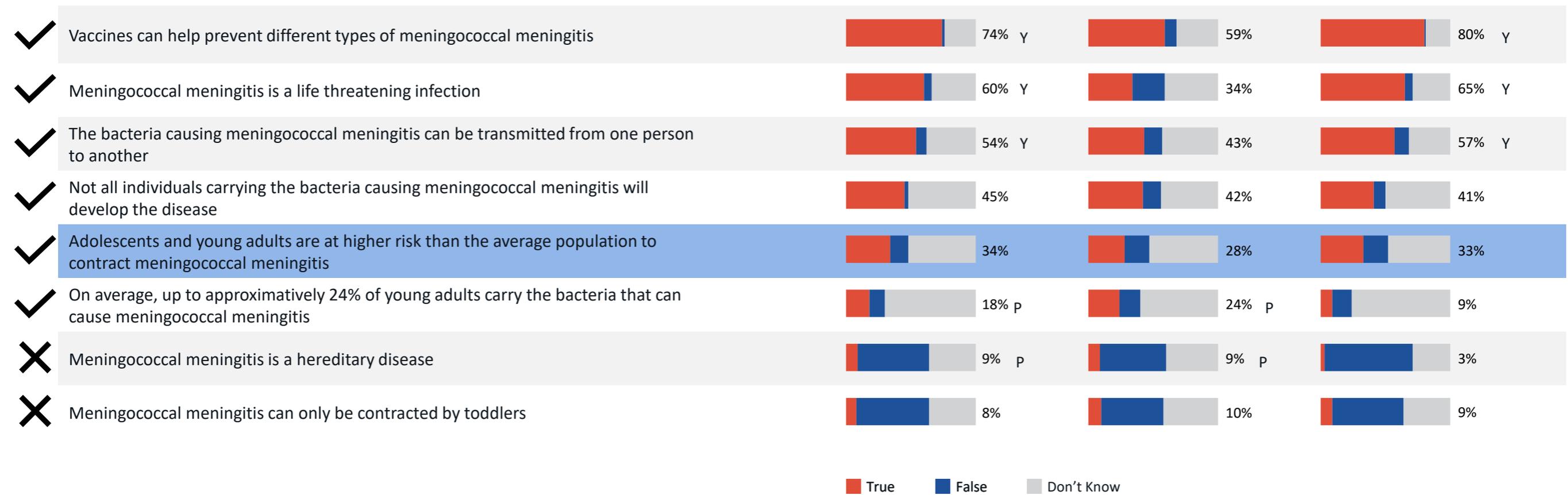
Only around one third of adolescents (34%), young adults (28%) and parents (33%) believe that their/ their children's age group is at higher risk than the average population of contracting meningitis

Agreement with the statements:

Adolescents (15-17)

Young adults (18-24)

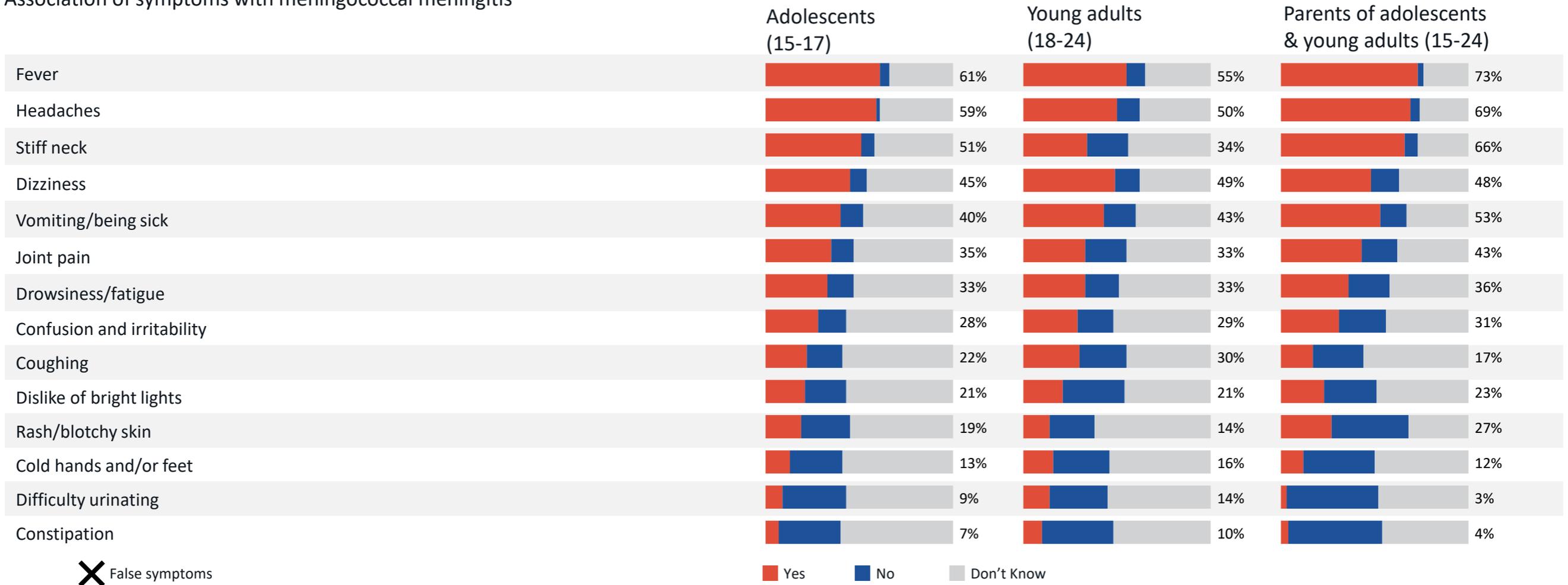
Parents of adolescents & young adults (15-24)



Q20. Please indicate which of the following statements you think is true or false. Base: Aware of Meningitis (n=725) ; Adolescents (15-17 years) (n=217) ; Young Adults (18-24 years) (n=210) ; Parents of adolescents & young adults (15-24) (n=298) A, Y, P = statistically significant difference between groups at 95% CI (A=adolescents, Y=young adults, P=parents)

Across the three groups most do not associate or do not know that symptoms like joint pain and dislike of bright lights are linked to meningococcal meningitis

Association of symptoms with meningococcal meningitis

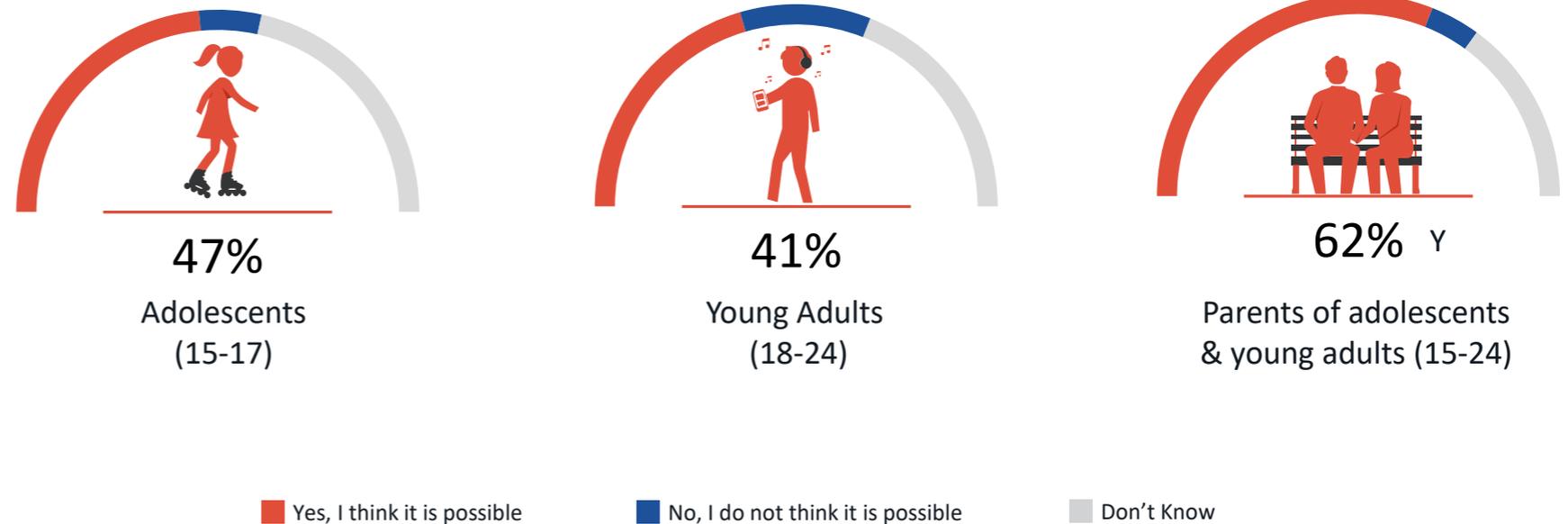


Q.19 Which, if any, of the following symptoms do you associate with meningococcal meningitis? Base: Aware of Meningitis (n=725) ; Adolescents (15-17 years) (n=217) ; Young Adults (18-24 years) (n=210) ; Parents of adolescents & young adults (15-24) (n=298) A, Y, P = statistically significant difference between groups at 95% CI (A=adolescents, Y=young adults, P=parents)

Amongst adolescents and young adults not vaccinated, most don't know or think it is not possible to be vaccinated against meningococcal meningitis

Amongst parents who have no children that have not been vaccinated against meningitis, over one third don't know or think it is not possible

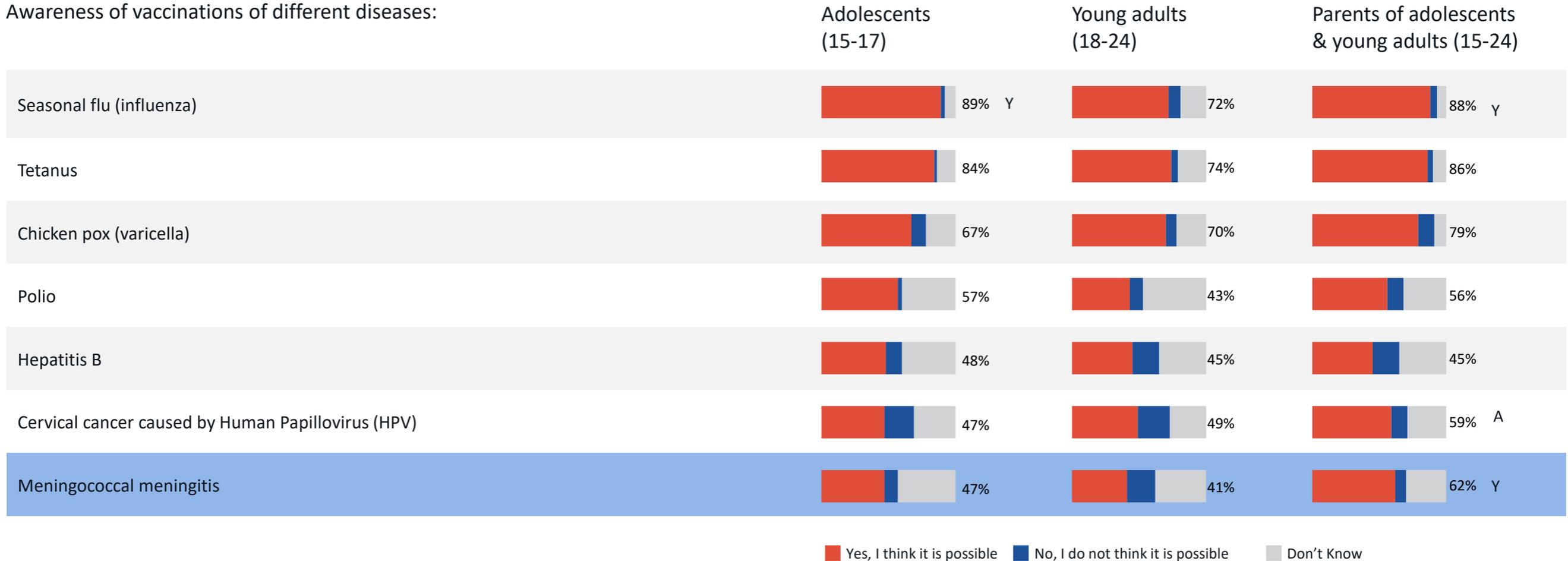
Awareness of possibility to vaccinated against meningitis:
(amongst those not vaccinated/whose children are not vaccinated)



Q17. Do you know if that it is possible to be vaccinated against of the following diseases? Base: Adolescents not vaccinated against meningococcal meningitis (n=51); Adolescents not vaccinated against meningococcal meningitis (n=66); Parents who have no children vaccinated against meningococcal meningitis (n=60); A, Y, P = statistically significant difference between groups at 95% CI (A=adolescents, Y=young adults, P=parents)

In comparison to other vaccine preventable diseases, a smaller proportion of adolescents and young adults think it possible to be vaccinated against meningococcal meningitis compared to other diseases

Awareness of vaccinations of different diseases:



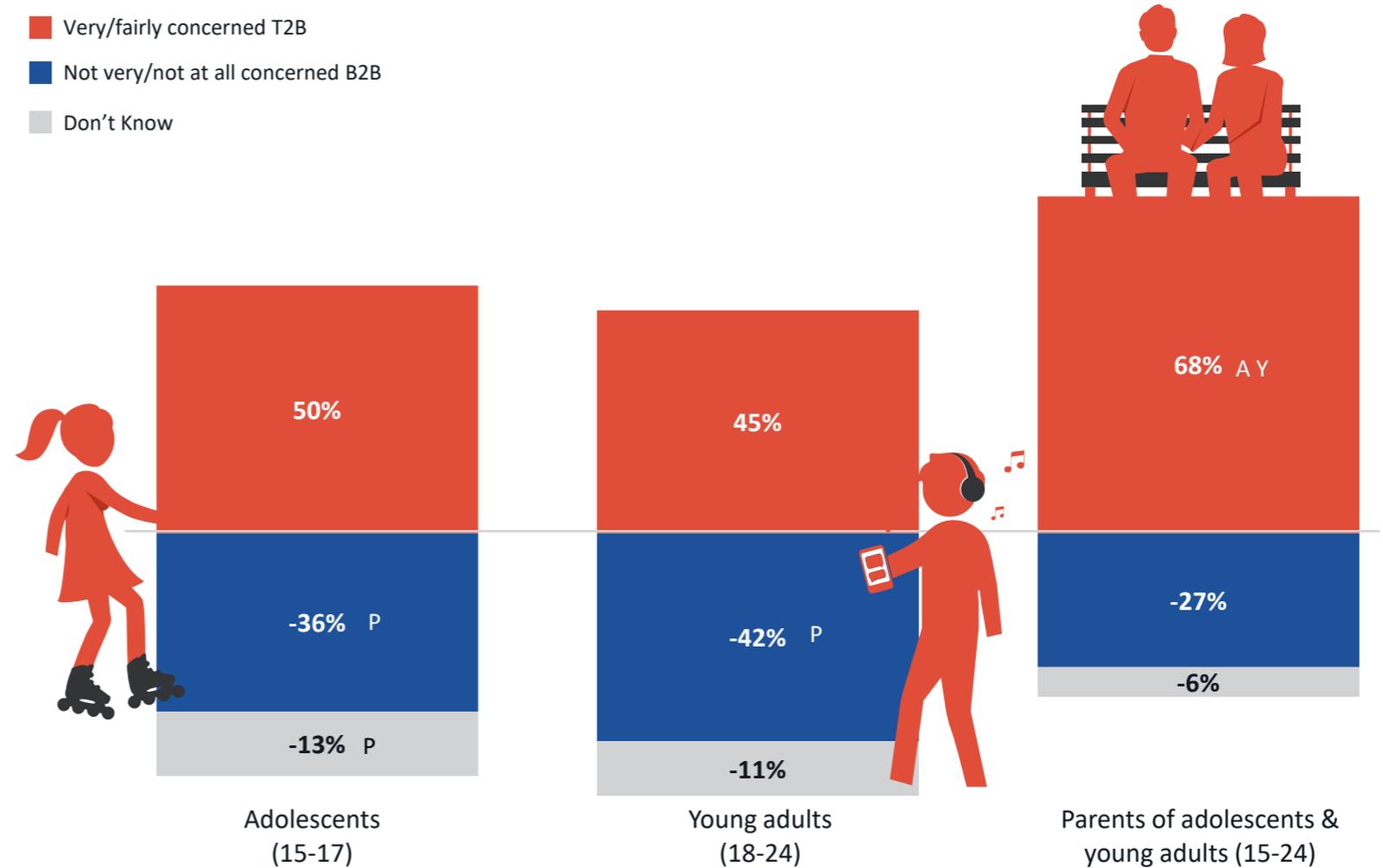
Q17. Do you know if it is possible to be vaccinated against of the following diseases? Base: Seasonal flu (influenza) (n=183,143,208) ; Tetanus (n=43,46,47) ; Polio (n=35,70,51) ; Hepatitis B (n=89,65,91) ; Cervical cancer caused by Human Papillovirus (HPV) (n=129,142,161) ; Meningococcal meningitis (n=51,66,60) A, Y, P = statistically significant difference between groups at 95% CI (A=adolescents, Y=young adults, P=parents)

Over one third of adolescents and young adults aware of meningococcal meningitis, are not personally concerned about catching it

- Significantly greater concern amongst:
 - Parents with 1 child (73%) vs. 2 or more children (61%)
 - Female parents (73%) vs. male parents (61%)
 - Unemployed parents (79%) vs. parents in full-time employment (60%)
 - Adolescents, young adults and parents in the south of Spain, compared to those in the east

Concern about themselves/their children catching meningococcal meningitis:

- Very/fairly concerned T2B
- Not very/not at all concerned B2B
- Don't Know

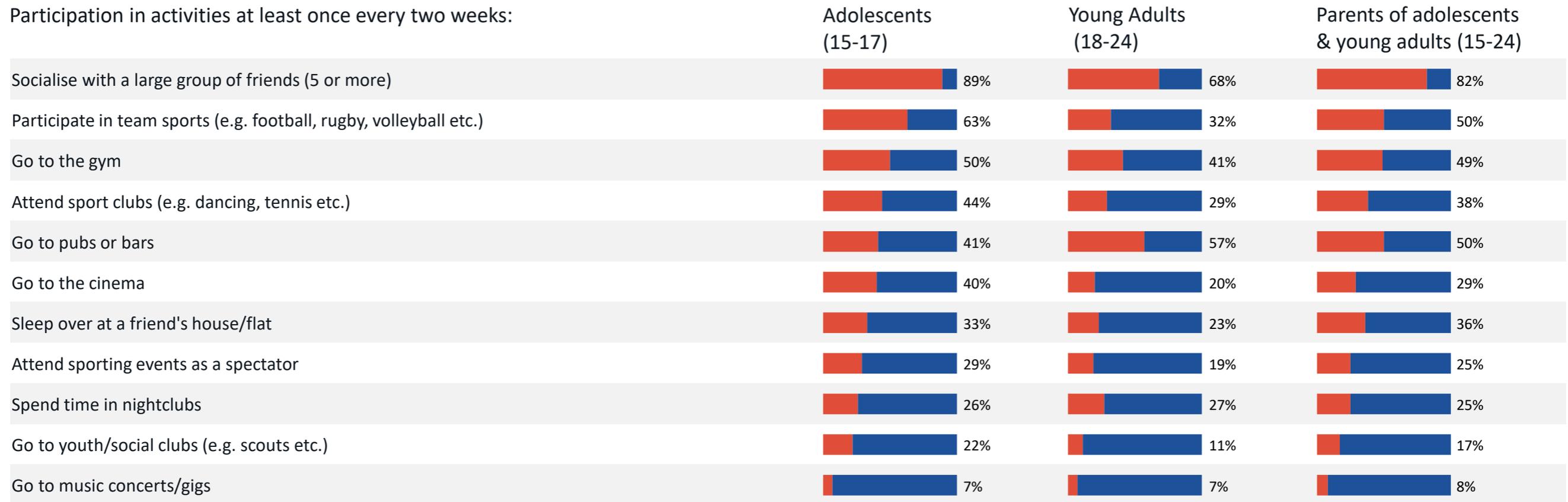


Q21. To what extent are you [ADOLESCENTS & YOUNG ADULTS: personally concerned or not about the risk of catching meningococcal meningitis yourself PARENTS: concerned or not about the risk of your children catching meningococcal meningitis]? Base: Aware of Meningitis (n=725); Adolescents (15-17 years) (n=217); Young Adults (18-24 years) (n=210); Parents of adolescents & young adults (15-24) (n=298) A, Y, P = statistically significant difference between groups at 95% CI (A=adolescents, Y=young adults, P=parents)

Behaviours related to meningococcal meningitis

Most adolescents and young adults have participated in at least one social activity in the past two weeks

Participation in activities at least once every two weeks:



■ At Least Once Every 2 Weeks

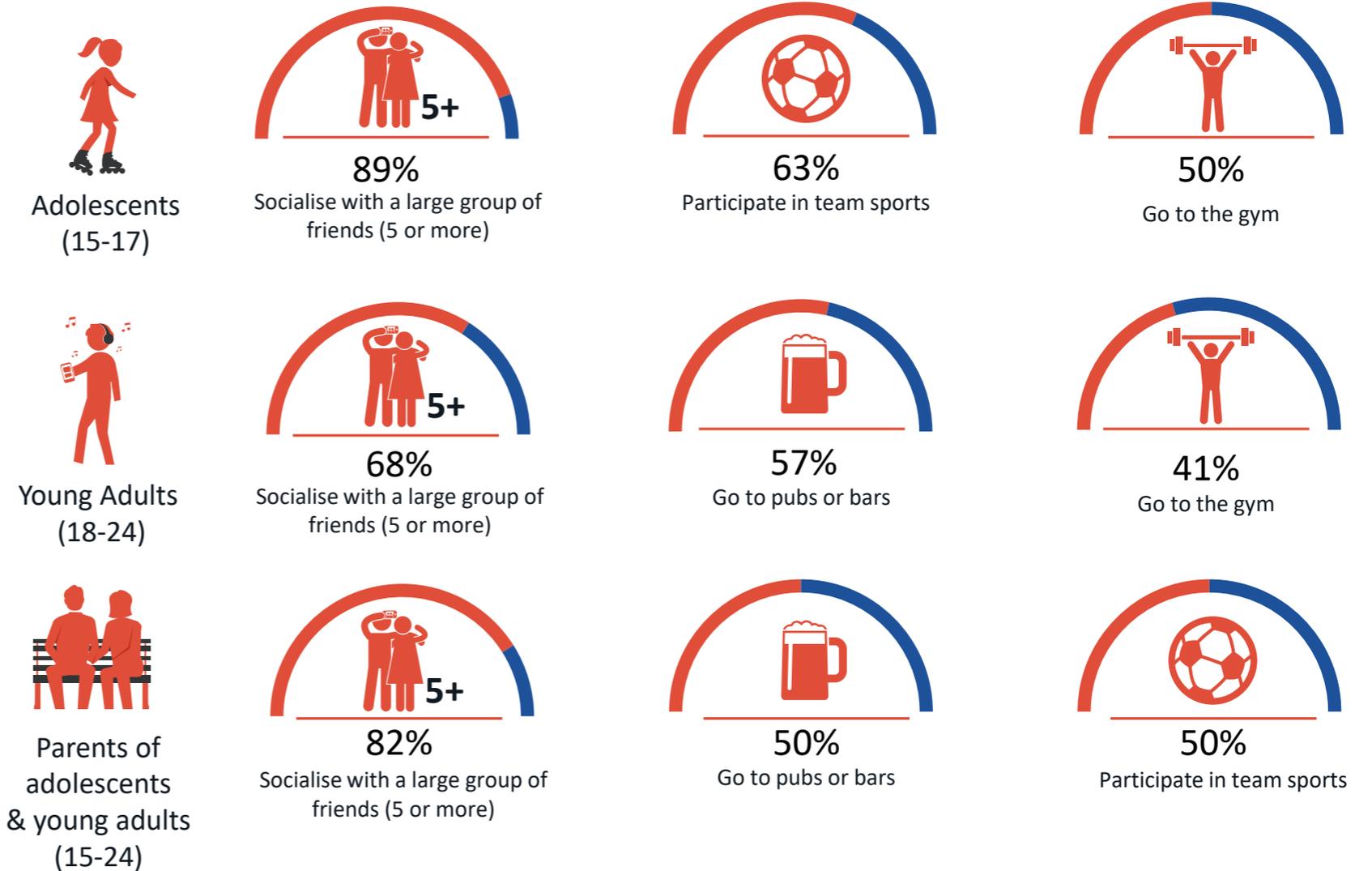
Q4. How often, if at all, [ADOLESCENTS & YOUNG ADULTS: do you personally PARENTS: does your child/children]... Base: all respondents: Adolescents (15-17) (n=300), Young adults (18-24) (n=300), Parents of adolescents & young adults (15-24) (n=340). A, Y, P = statistically significant difference between groups at 95% CI (A=adolescents, Y=young adults, P=parents)

Socialising with large groups of friends is the most common activity for both adolescents and young adults

- Amongst young adults, compared to females, significantly more males socialise with a large group of friends (74% vs females 61%), participate in team sports (48% vs females 15%) and go to the gym (47% vs females 35%)
- Amongst adolescents significantly more males participate in team sports (76%) than females (49%)

% participating in activities at least once every two weeks (top 3):

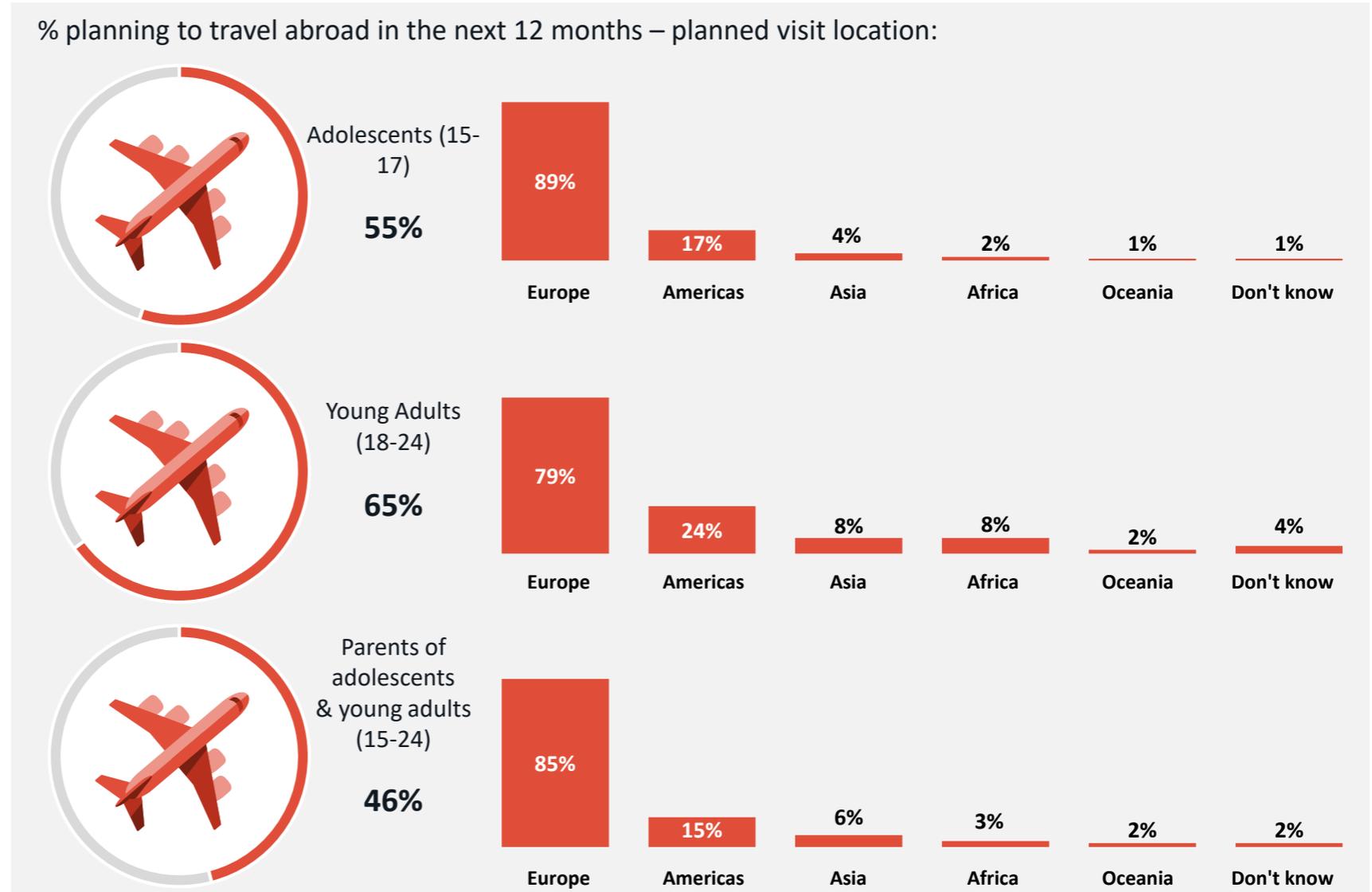
■ At Least Once Every 2 Weeks



Q4. How often, if at all, [ADOLESCENTS & YOUNG ADULTS: do you personally PARENTS: does your child/children]... Base: all respondents: Adolescents (15-17) (n=300), Young Adults (18-24) (n=300), Parents of adolescents & young adults (15-24) (n=340) A, Y, P = statistically significant difference between groups at 95% CI (A=adolescents, Y=young adults, P=parents)

Nearly two-thirds of young adults and more than half of adolescents plan to travel abroad in the next twelve months

- Significantly more parents indicate that their children aged 18-24 plan to travel abroad in the next 12 months, compared to their children aged 15-17
- Young adults are significantly more likely to say they plan to travel to Africa and America than adolescents

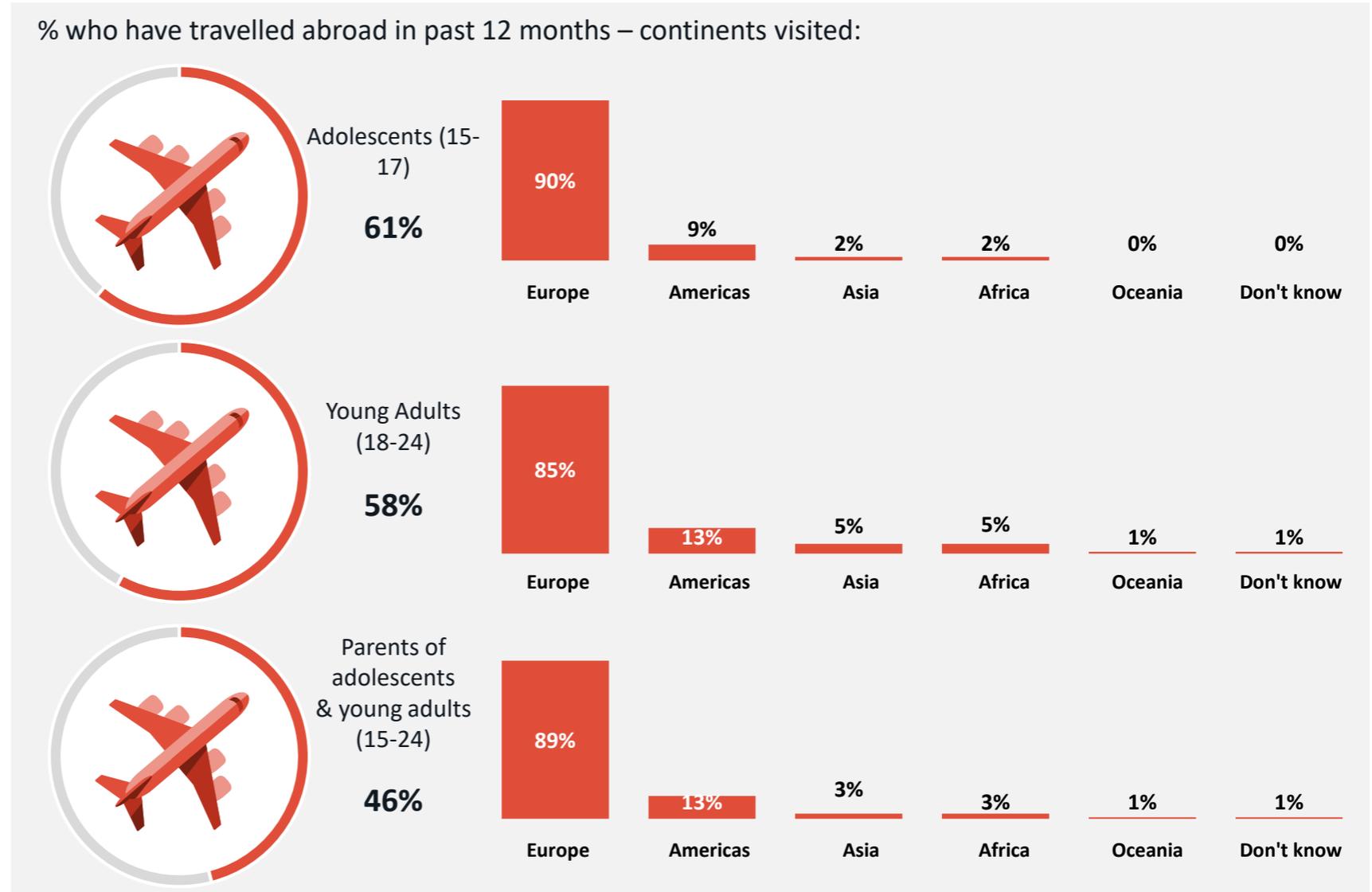


Q5. Are [ADOLESCENTS & YOUNG ADULTS: you PARENTS: your child/children] planning to travel abroad in the next twelve months?

Q6. Which regions are [ADOLESCENTS & YOUNG ADULTS: you PARENTS: your child/children] planning to visit in the next twelve months? Base: all respondents: Adolescents (15-17) (n=300), Young adults (18-24) (n=300), Parents of adolescents & young adults (15-24) (n=340). A, Y, P = statistically significant difference between groups at 95% CI (A=adolescents, Y=young adults, P=parents)

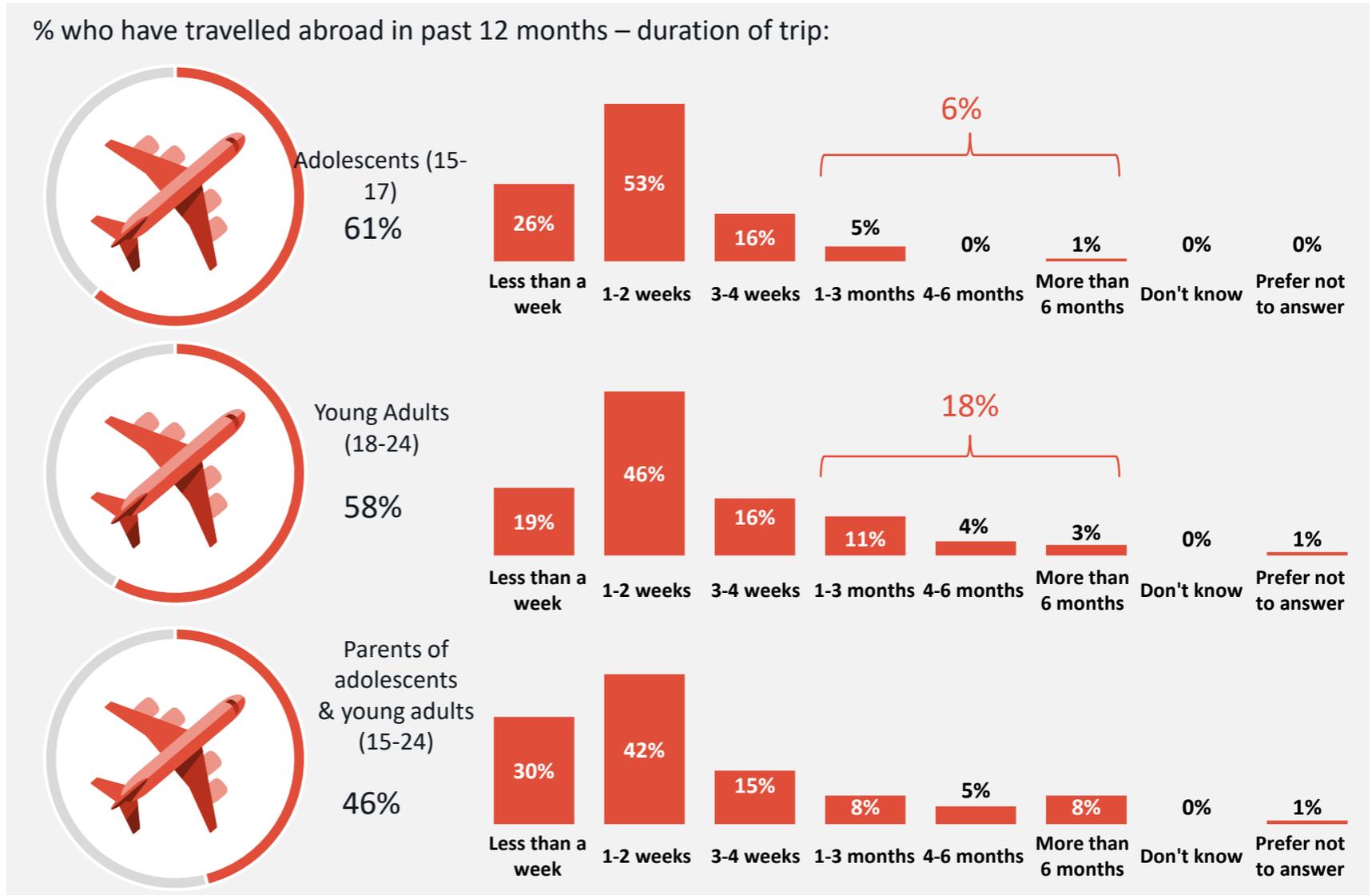
In the past year, around half of young adults and adolescents have travelled abroad, mostly to Europe

- Significantly more male young adults (10%) have travelled to Asia in the last 12 months, than females (1%)



Q8. In the past 12 months, have [ADOLESCENTS & YOUNG ADULTS: you PARENTS: your child/children] travelled abroad? Q9. Which regions did [ADOLESCENTS & YOUNG ADULTS: you PARENTS: your child/children] visit? Base: all respondents: Adolescents (15-17) (n=300), Young adults (18-24) (n=300), Parents of adolescents & young adults (15-24) (n=340). A, Y, P = statistically significant difference between groups at 95% CI (A=adolescents, Y=young adults, P=parents)

Although most travel is short term, 18% of young adults have travelled abroad for a period of more than 1 month, in the last 12 months



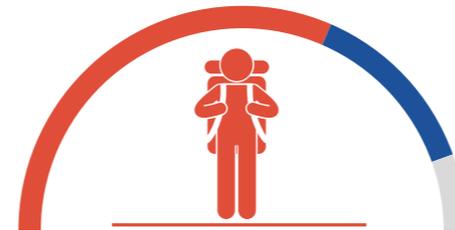
Q8. In the past 12 months, have [ADOLESCENTS & YOUNG ADULTS: you PARENTS: your child/children] travelled abroad? Q10. What was the longest continuous period [ADOLESCENTS & YOUNG ADULTS: you PARENTS: your child/children] were abroad in the past 12 months? Base: all respondents: Adolescents (15-17) (n=300), Young adults (18-24) (n=300), Parents of adolescents & young adults (15-24) (n=340). A, Y, P = statistically significant difference between groups at 95% CI (A=adolescents, Y=young adults, P=parents)

In addition, almost two thirds of adolescents have travelled in a large group, and most of the rest would like to in the future

Most adolescents have also been on a holiday organised by an institution such as their school and have stayed in a hostel in the last 12 months

- 81% of adolescents have travelled in a large group, a significantly greater proportion than young adults (73%)
 - Definition of large group: net of 'travelled as part of a large group of 5 or more'; 'been on a holiday organised through a school/college/university'; 'participated in large public events'; 'participated in large religious gatherings'

Participation in activities while travelling abroad in the last 12 months
Adolescents (15-17 years)



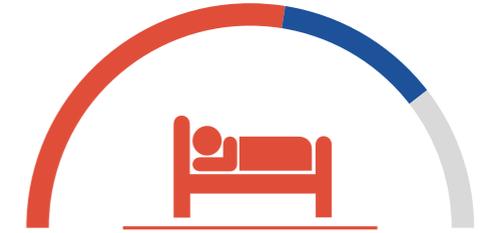
63% Y

Travelled as part of a large group of five or more people



63% Y

Been on holiday organised through a school, college or university



55%

Stayed in a hostel



49%

Stayed as a guest in someone's house



46%

Participated in large public events



13%

Participated in large religious gatherings

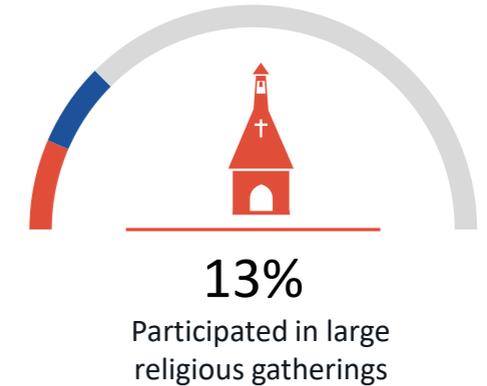
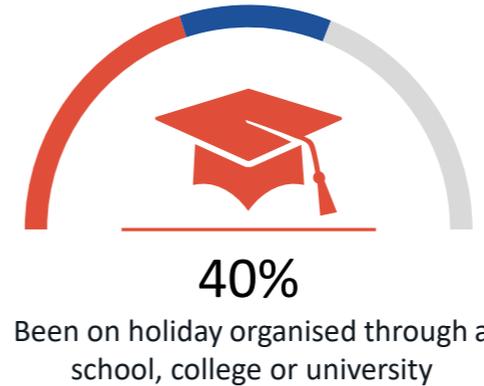
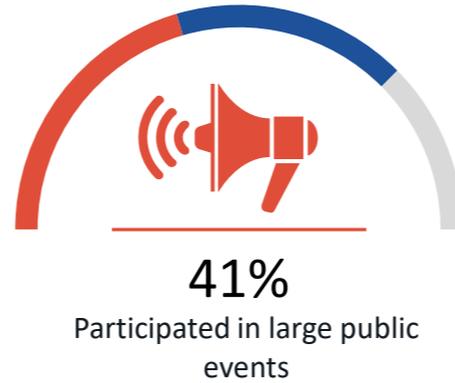
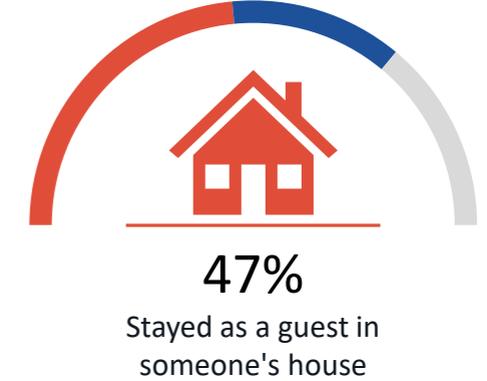
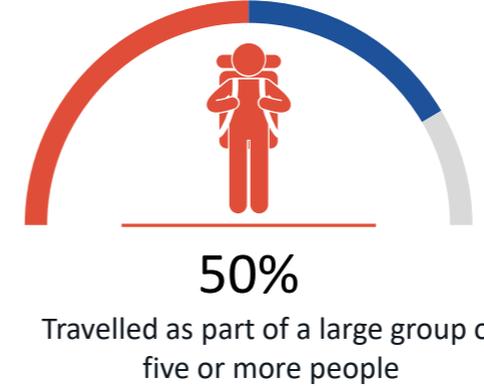
Yes- have done already

No – but would like to in future

More than half of young adults have stayed in a hostel in the last 12 months

- Students are significantly more likely to have travelled as a large group, than those in full time education or unemployed
- 73% of young adults have travelled in a large group
 - *Definition of large group: net of 'travelled as part of a large group of 5 or more'; 'been on a holiday organised through a school/college/university'; 'participated in large public events'; 'participated in large religious gatherings'*

Participation in activities while travelling abroad in the last 12 months
Young Adults (18-24 years)

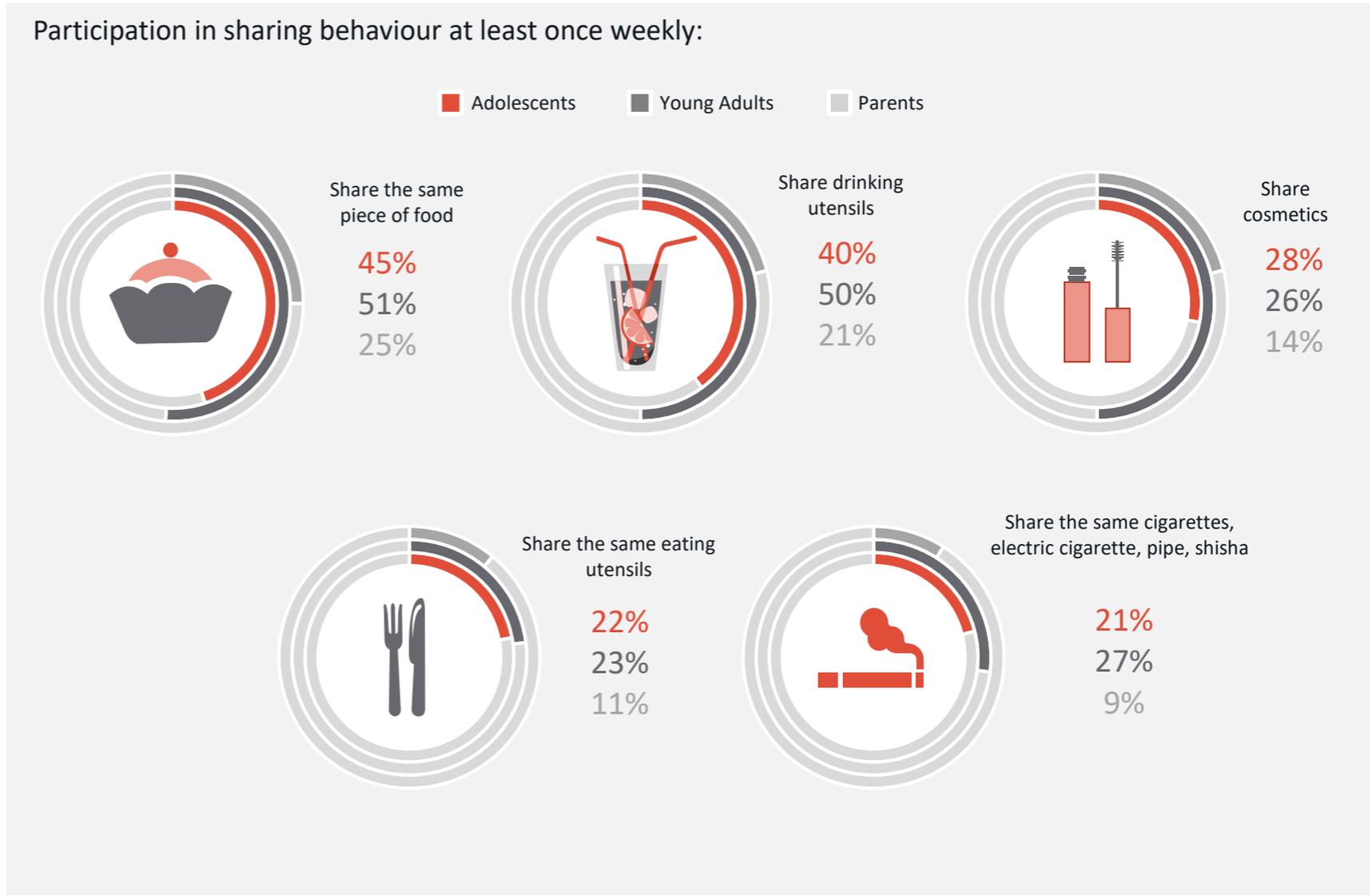


■ Yes- have done already ■ No – but would like to in future

Q11. Which, if any, of the following [ADOLESCENTS & YOUNG ADULTS: have you personally PARENTS: has your child/children] done when on holiday, within your own country or abroad, in the past 12 months? Base: all respondents: Young Adults (18-24) (n=300) A, Y, P = statistically significant difference between groups at 95% CI (A=adolescents, Y=young adults, P=parents)

Sharing food at least once weekly is the activity most commonly reported by both adolescents and young adults, closely followed by sharing drinking utensils

- Parents think their children share items less often than they report
- However parents with 2 or more children report higher sharing than those with 1 child
- Just over a third of female adolescents (34%) and young adults (35%) share cosmetics
- A greater proportion of male adolescents share eating utensils (27%), and cigarettes (28%) than females (16% & 15% respectively)

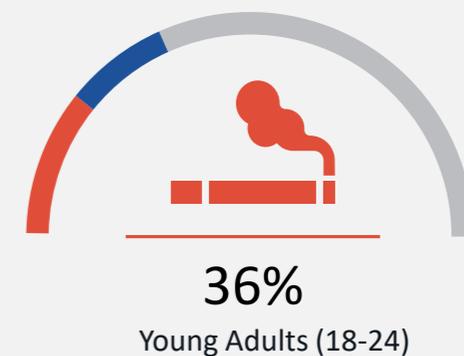
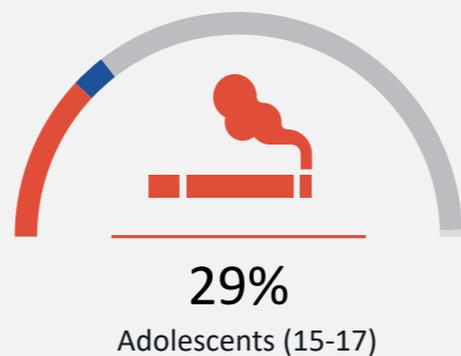


Q12. When spending time with friends, how often, if at all, do [ADOLESCENTS & YOUNG ADULTS: you PARENTS: your child/children, as far as you are aware,... Base: all respondents: Adolescents (15-17) (n=300); Young Adults (18-24) (n=300); Parents of adolescents & young adults (15-24) (n=340) A, Y, P = statistically significant difference between groups at 95% CI (A=adolescents, Y=young adults, P=parents)

36% of young adults and 29% of adolescents claim to smoke at least occasionally

- Significantly fewer female adolescents and young adults smoke, compared to males
- Young adults in full time employment are significantly more likely to smoke regularly than those in part-time employment and students

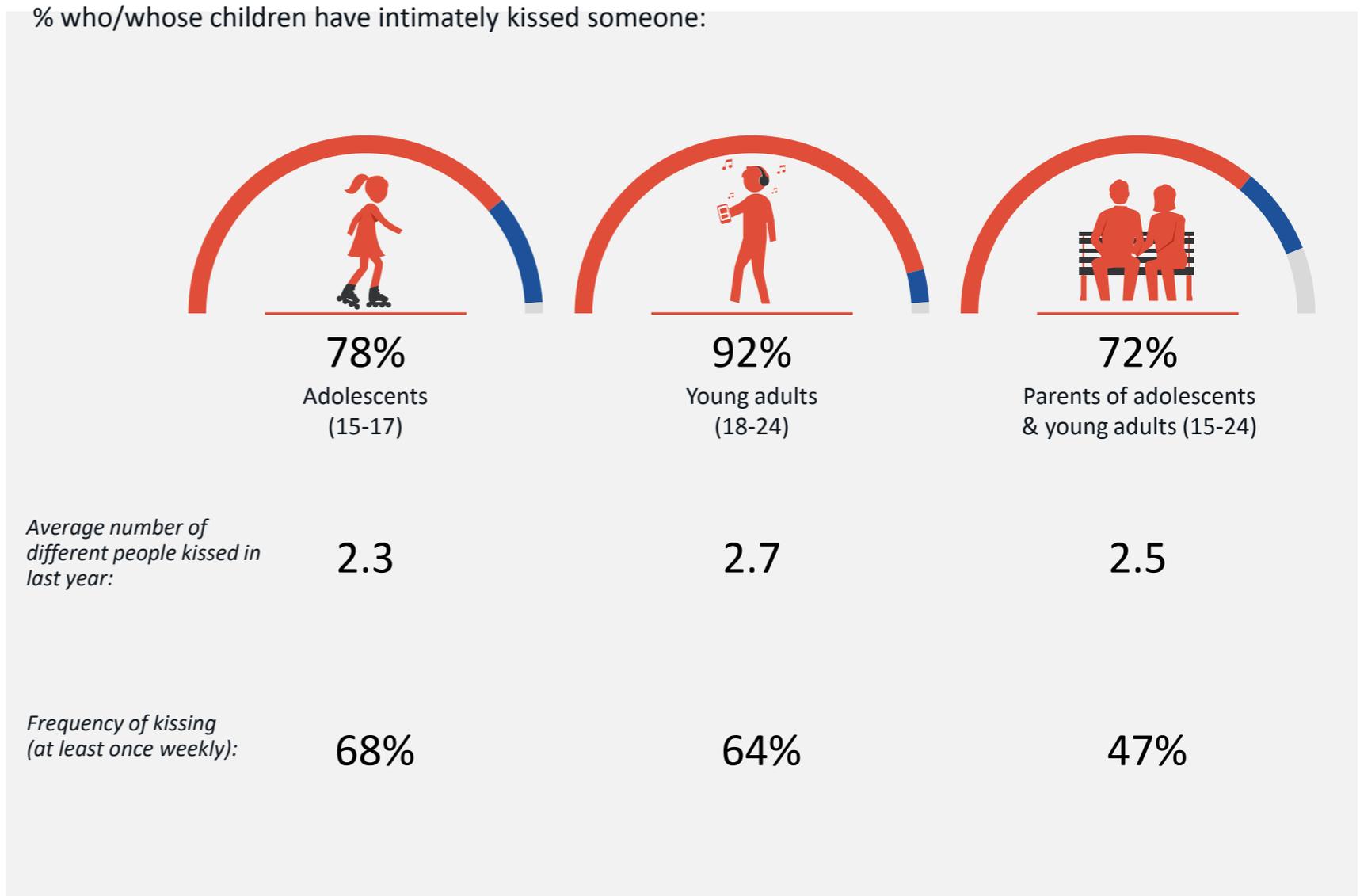
% reporting smoking behaviours:



■ Yes, occasionally ■ Yes, regularly ■ Don't Know

The majority of young adults and almost 8 in 10 adolescents report having intimately kissed someone

- Almost all female young adults report to have intimately kissed someone (95%), compared to 88% of males

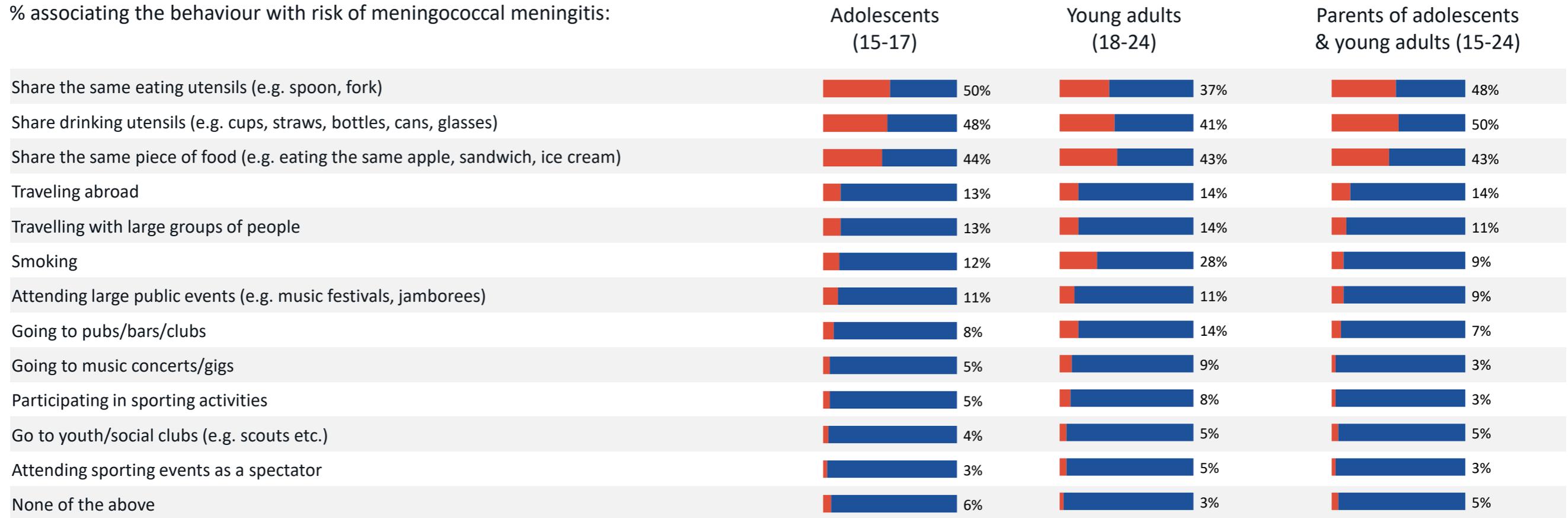


Q13. Have [ADOLESCENTS & YOUNG ADULTS: you PARENTS: your child/children, as far as you are aware,] ever intimately kissed someone? Q14. How many different people have [ADOLESCENTS & YOUNG ADULTS: you PARENTS: your child/children, as far as you are aware,] intimately kissed in the past year? Q14B. How often do [ADOLESCENTS & YOUNG ADULTS: you PARENTS: your child/children, as far as you are aware,] intimately kiss another person? Base: all respondents: Adolescents (15-17) (n=300), Young Adults (18-24) (n=300), Parents of adolescents & young adults (15-24) (n=340). A, Y, P = statistically significant difference between groups at 95% CI (A=adolescents, Y=young adults, P=parents)

Perceived level of risk for behaviours

Most adolescents and young people do not associate many of the activities they engage in with a higher than average risk of contracting meningitis.

% associating the behaviour with risk of meningococcal meningitis:

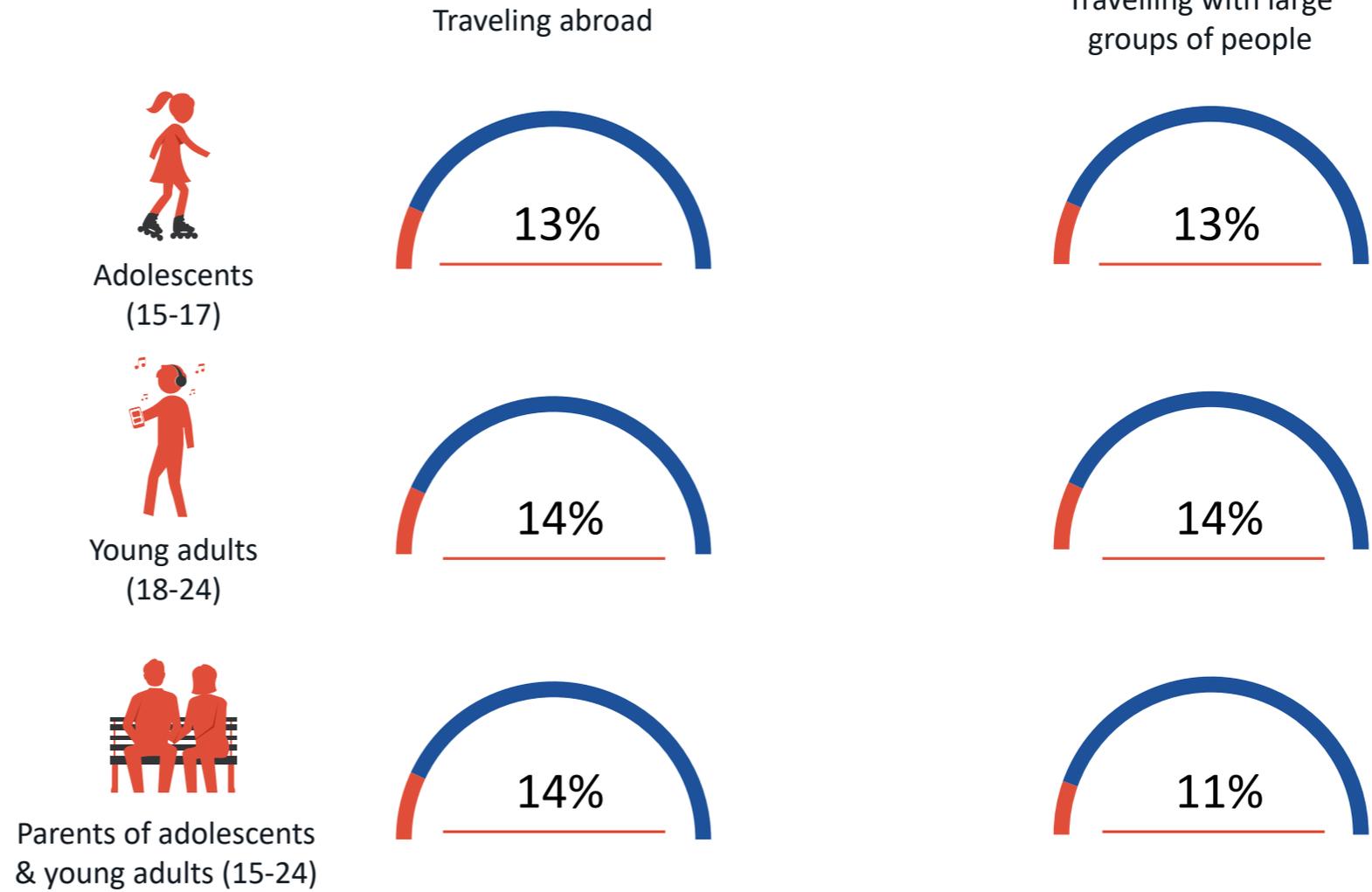


 % associate

Q22. Which, if any, of the following situations listed below do you associate with a higher risk of contracting meningococcal meningitis than average? Base: Aware of Meningitis : Adolescents (15-17) (n=217), Young adults (18-24) (n=210), Parents of adolescents & young adults (15-24) (n=298). A, Y, P = statistically significant difference between groups at 95% CI (A=adolescents, Y=young adults, P=parents)

Across the three groups, the majority don't associate travel with a higher risk of contracting the disease

Association of travel with meningitis risk:



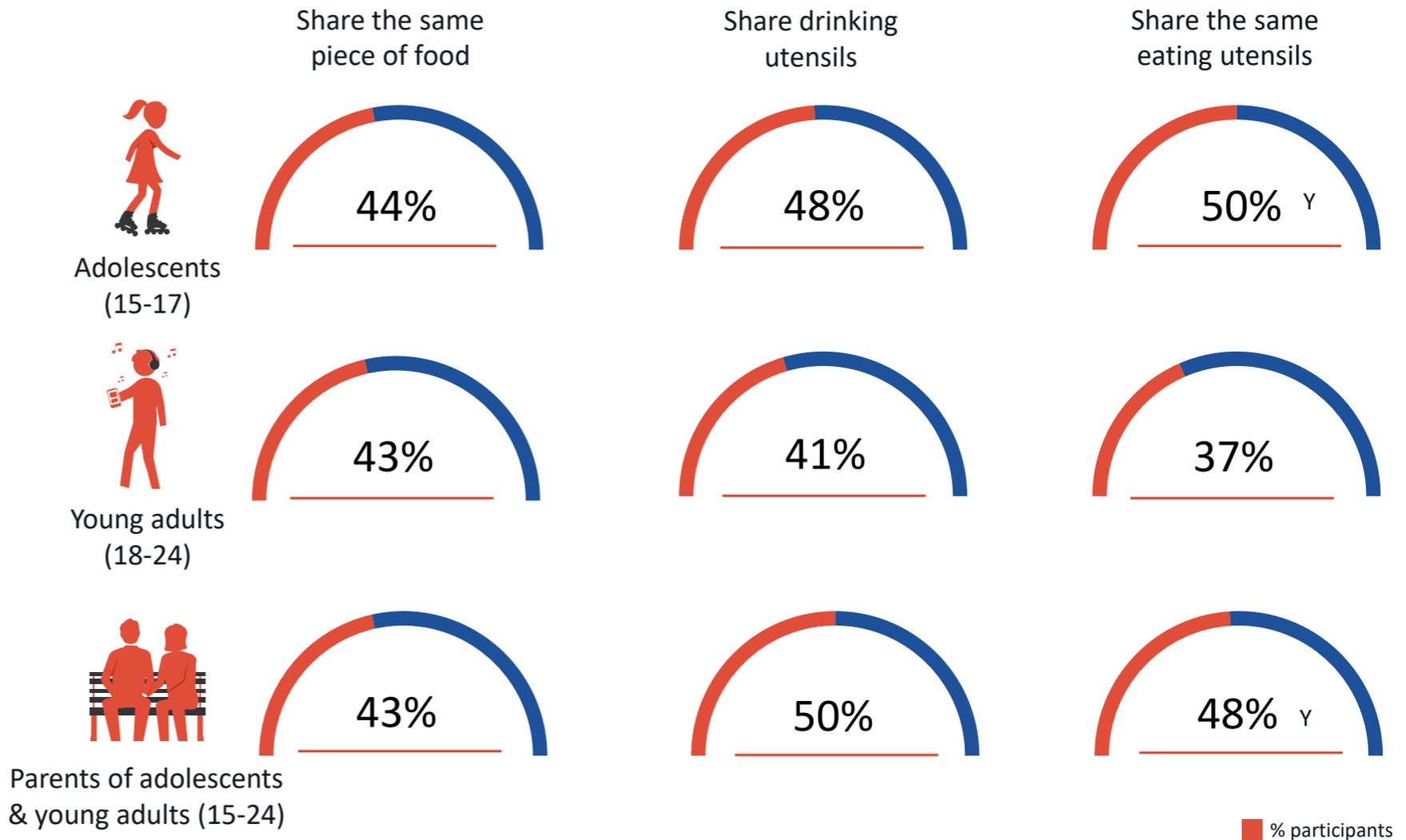
■ % participants

Q22. Which, if any, of the following situations listed below do you associate with a higher risk of contracting meningococcal meningitis than average? Base: Aware of Meningitis : Adolescents (15-17) (n=217)
 A, Y, P = statistically significant difference between groups at 95% CI (A=adolescents, Y=young adults, P=parents)

In addition, at least half of adolescents and young adults do not associate sharing drinking/eating utensils and food with a higher risk of contracting meningitis

- A significantly greater proportion of female young adults and parents associate all these sharing activities with meningitis risk, compared to males

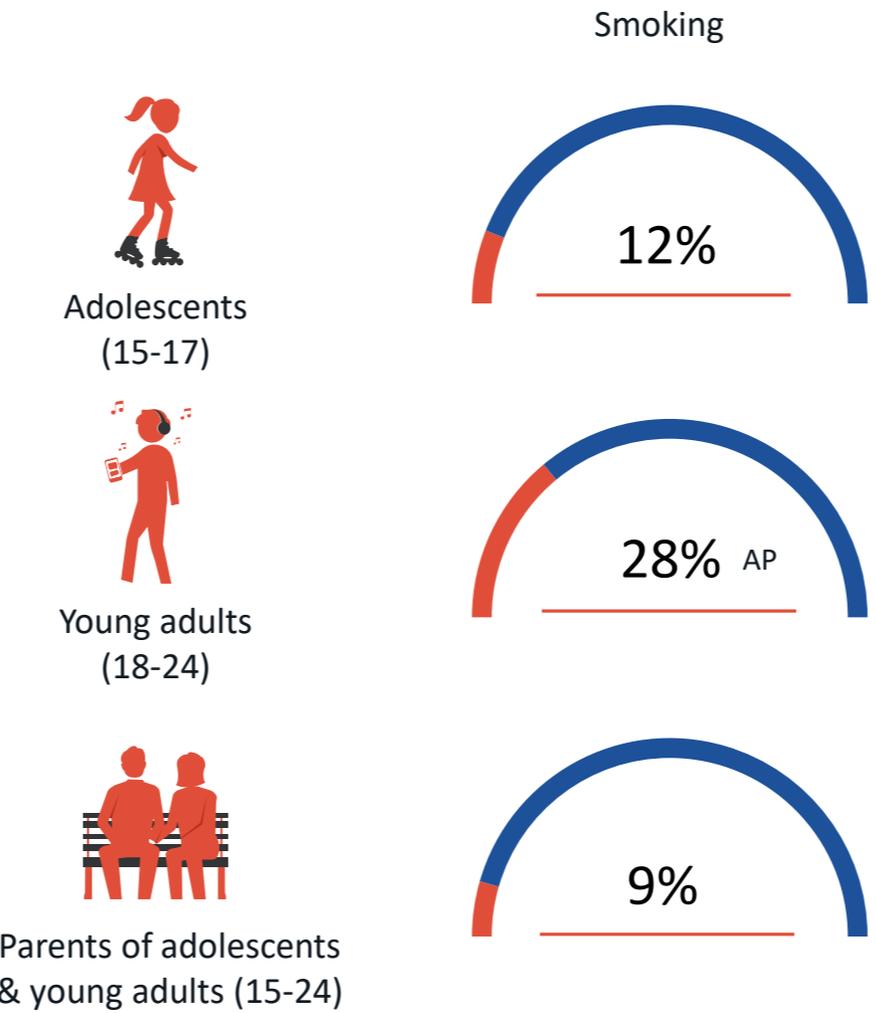
Association of sharing with meningitis risk:



Q22. Which, if any, of the following situations listed below do you associate with a higher risk of contracting meningococcal meningitis than average? Base: Aware of Meningitis : Adolescents (15-17) (n=217); Young Adults (18-24)(n=210); Parents of adolescents & young adults (15-24)(n=298) A, Y, P = statistically significant difference between groups at 95% CI (A=adolescents, Y=young adults, P=parents)

While only around 3 in 10 young adults and 1 in 10 adolescents and parents associate smoking with a higher than average risk of contracting meningitis

Association of smoking with meningitis risk:

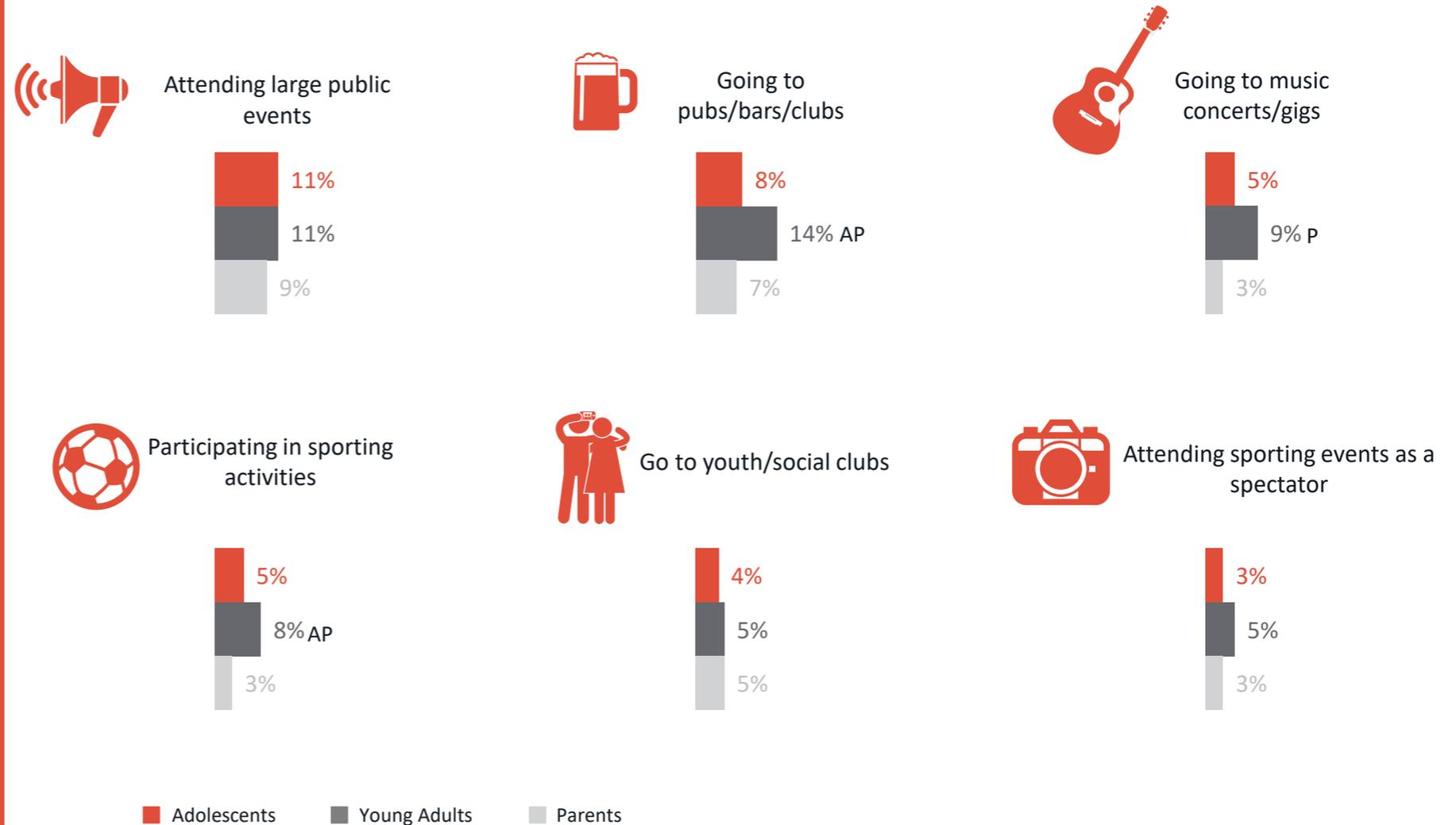


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This is also the case for other social activities - most people do not associate social activities with a higher than average risk of contracting meningitis

- Significantly more male young adults associate participating in sporting activities (13%), going to youth/social clubs (10%) and attending sporting events (9%) with risk, than females (4%, 2%, 2%)

Association of social events with meningitis risk:

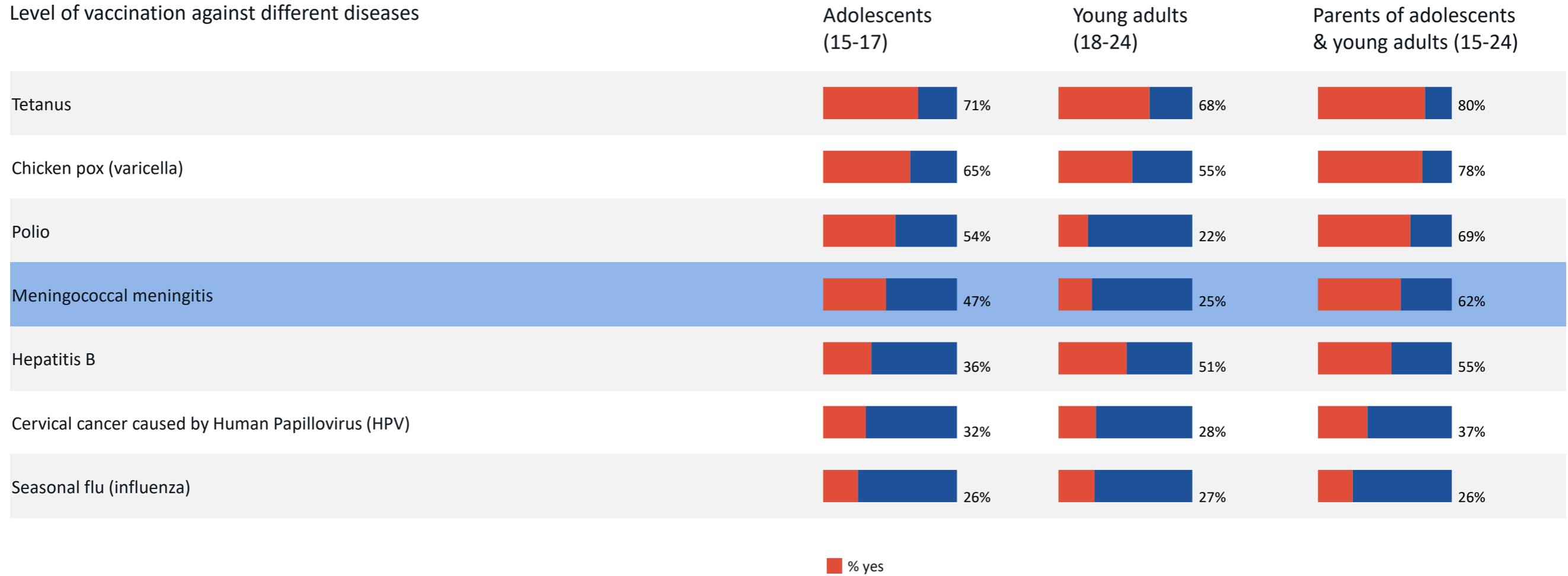


Q22. Which, if any, of the following situations listed below do you associate with a higher risk of contracting meningococcal meningitis than average? Base: Aware of Meningitis : Adolescents (15-17) (n=217) A, Y, P = statistically significant difference between groups at 95% CI (A=adolescents, Y=young adults, P=parents)

Meningococcal meningitis vaccination

In comparison to other diseases, the perceived level of vaccination against meningitis is lower than tetanus, chicken pox and polio

Level of vaccination against different diseases



Q16. Have [ADOLESCENTS & YOUNG ADULTS: you PARENTS: your child/children] ever been vaccinated against any of the following diseases? Base: all respondents aware of each disease A, Y, P = statistically significant difference between groups at 95% CI (A=adolescents, Y=young adults, P=parents)

Many young adults do not know if they have been vaccinated against meningitis - only a quarter think they have

- Parents with children aged 15-17 years report a significantly higher proportion these children have been vaccinated against meningitis (67%), than parents with children aged 18-24 years (59%)
- Male parents are less aware whether their children have been vaccinated (27% don't know) than female parents (13% don't know)

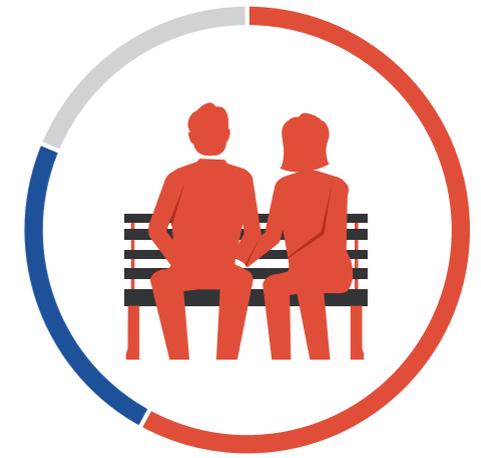
Level of vaccination against meningococcal meningitis:



47% ^Y
Adolescents
(15-17 years old)



25%
Young adults
(18-24 years old)



62% ^{A Y}
Parents of adolescents &
young adults aged 15-24

■ Yes ■ No ■ Don't Know

The majority adolescents and parents state that they believe in receiving or giving all recommended vaccinations, however only three quarters of young adults do

- Only around half of young adults (53%) strongly believe in having all recommended vaccinations

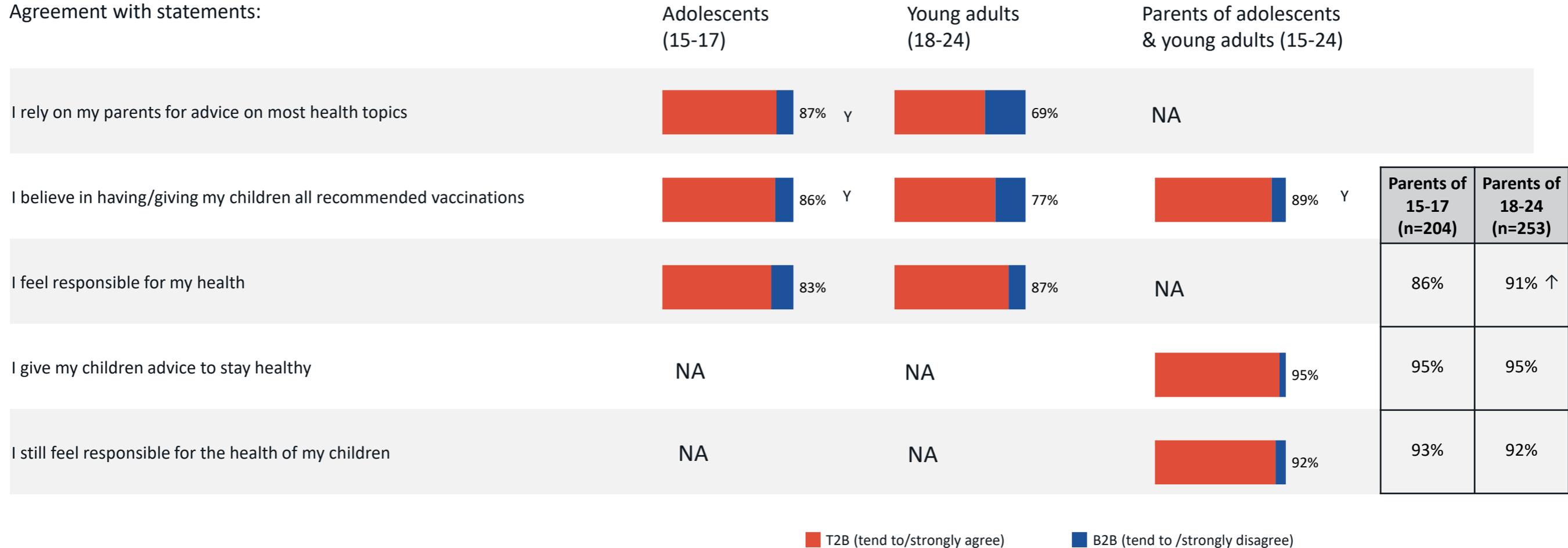
Belief in having/giving children all recommended vaccinations:



Q23. To what extent do you agree or disagree with each of the following statements? "I believe in having/giving my children all recommended vaccinations" Base: all respondents Adolescents (15-17) (n=300), Young adults (18-24) (n=300), Parents of adolescents & young adults (15-24) (n=340). A, Y, P = statistically significant difference between groups at 95% CI (A=adolescents, Y=young adults, P=parents)

Most people feel responsible for their own or their children’s health across the three groups. 4 out of 5 adolescents rely on their parents for health advice

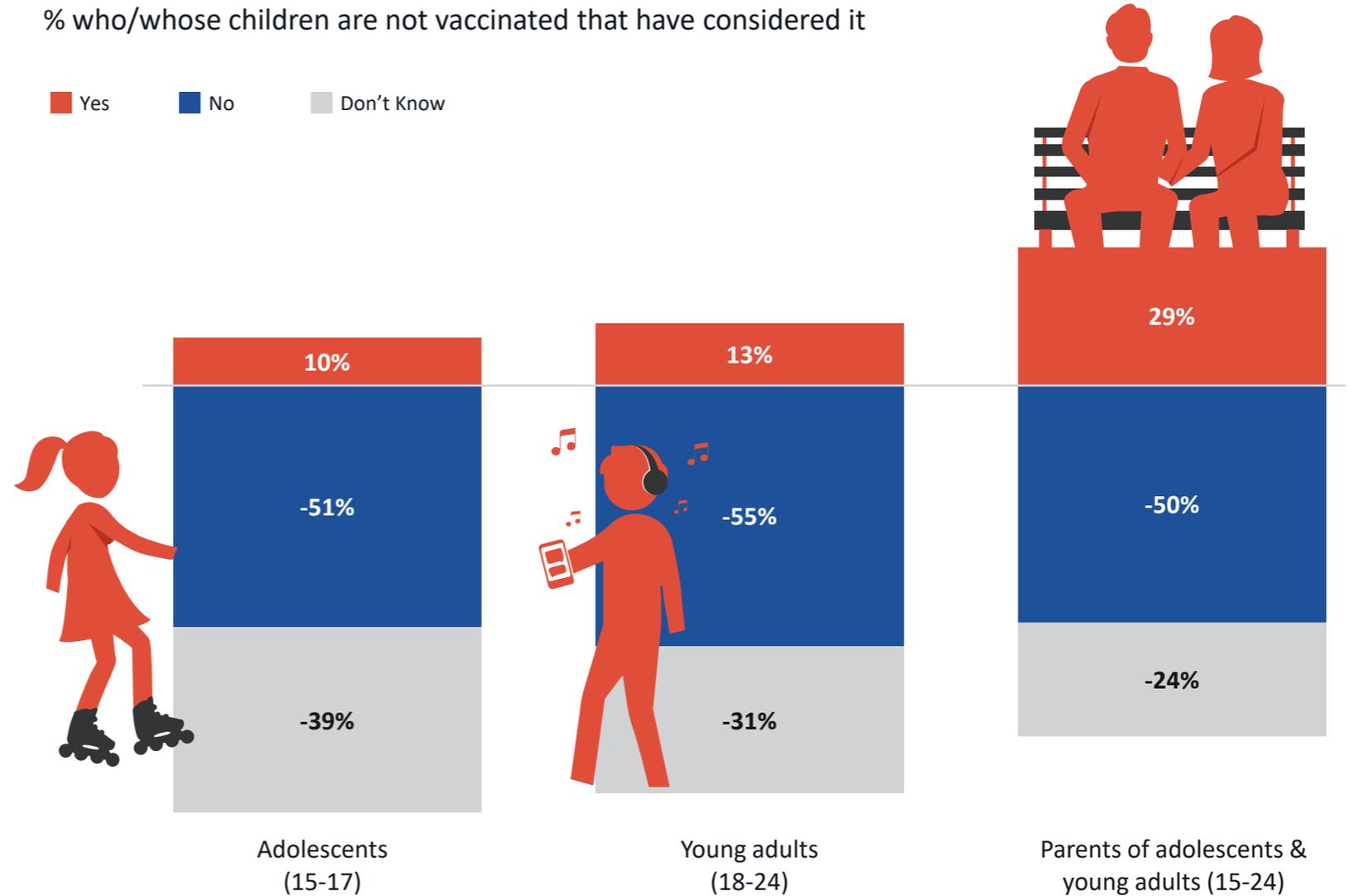
Agreement with statements:



Q23. To what extent do you agree or disagree with each of the following statements? Base: All Respondents: Adolescents (15-17) (n=300), Young adults (18-24) (n=300), Parents of adolescents & young adults (15-24) (n=340) A, Y, P = statistically significant difference between groups at 95% CI (A=adolescents, Y=young adults, P=parents). ↑ = statistically significant difference between subgroups at 95% CI

However, amongst those that stated they think they have not been vaccinated against meningitis, only a minority have considered it

- While parents are significantly more likely to have considered vaccinating their children against meningitis, this proportion is still relatively low



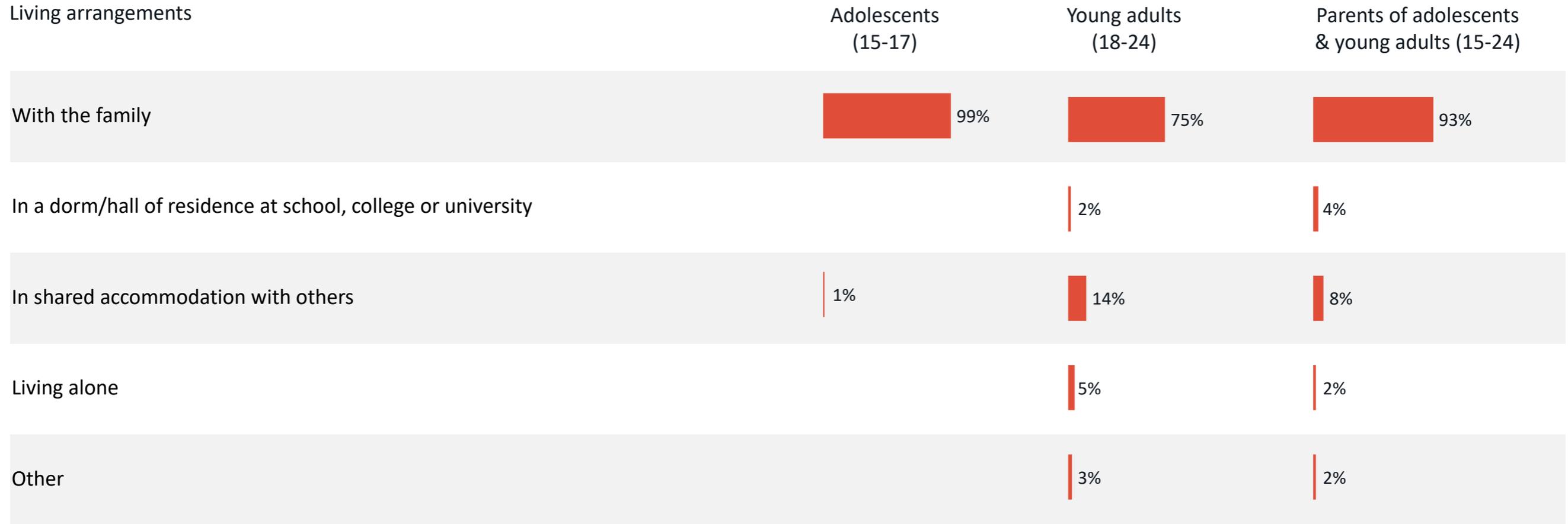
Q18. ADOLESCENTS & YOUNG ADULTS: Have you ever personally considered being vaccinated yourself against meningococcal meningitis? PARENTS: Have you ever thought of vaccinated your child against meningococcal meningitis? Base: all respondents. Adolescents (15-17) (n=51), Young adults (18-24) (n=66), Parents of adolescents & young adults (15-24) (n=78) A, Y, P = statistically significant difference between groups at 95% CI (A=adolescents, Y=young adults, P=parents)

Appendix



Almost all adolescents live with the family. Three quarters of young adults live with the family, while 14% live in shared accommodation

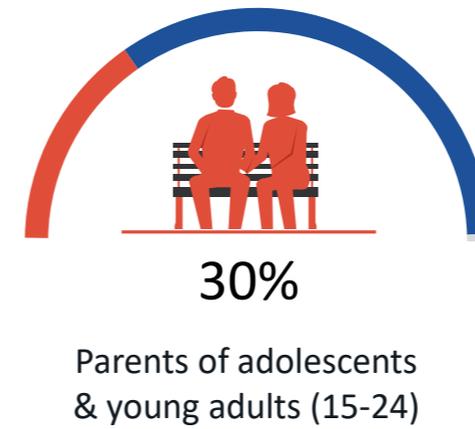
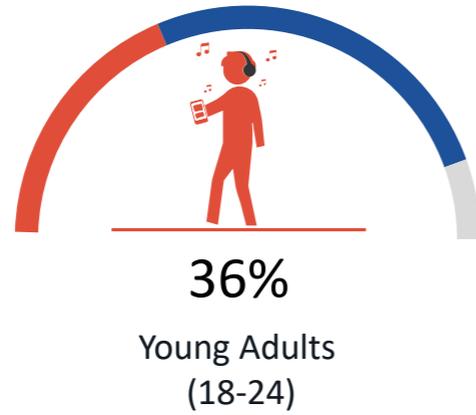
Living arrangements



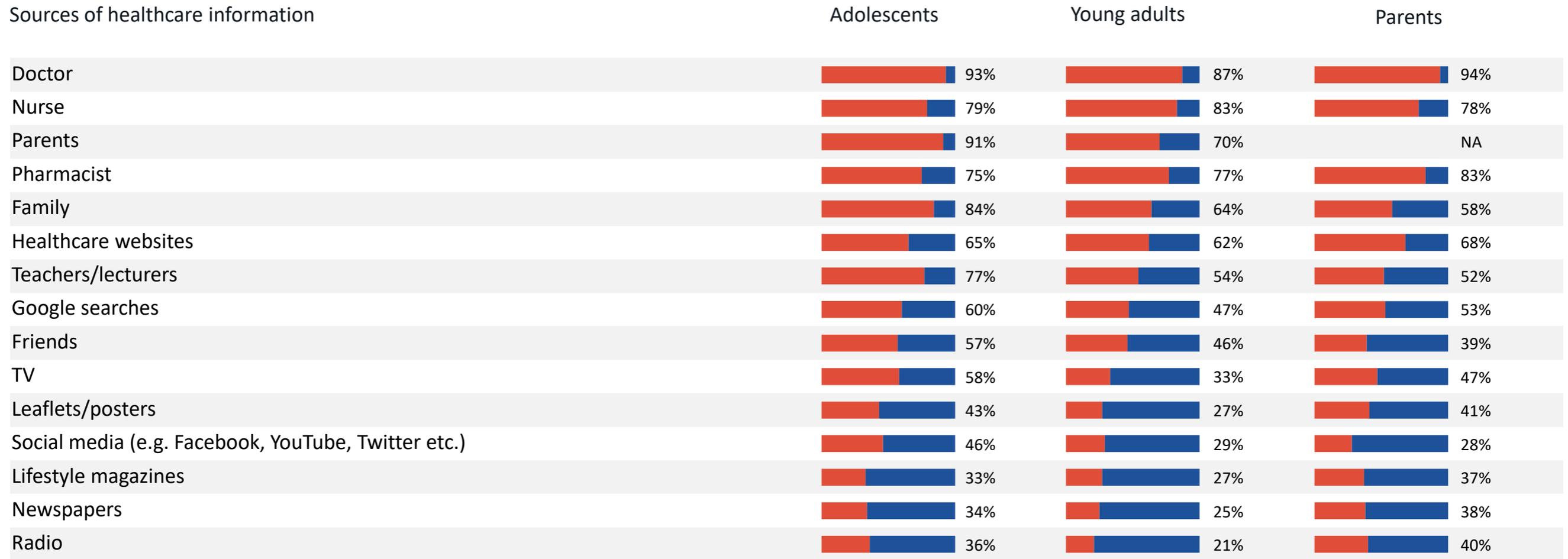
% respondents

Q.1 Which of the following best describes your/ your child/children's aged 15-24 current living arrangements? Base: all respondents, adolescents (n=300); young adults (n=300); parents (n=340)
 A, Y, P = statistically significant difference between groups at 95% CI (A=adolescents, Y=young adults, P=parents)

Around one third of adolescents and parents have private/healthcare insurance for themselves/that covers their children aged 15-24



The sources of information that people would most like to use to find out more about healthcare topics are doctors, nurses and pharmacists, as well as parents for adolescents and young adults

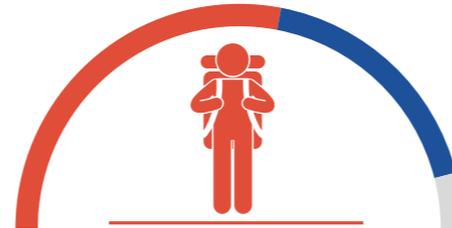


■ % yes

Q.24 Which of the following sources of information would people like yourself like to use to find out more about topic relating to healthcare? Please answer yes or no to the options in the list below. Base: all respondents, adolescents (n=300); young adults (n=300); parents (n=340) A, Y, P = statistically significant difference between groups at 95% CI (A=adolescents, Y=young adults, P=parents)

More than half of parents report that their children have travelled as part of a large group

Participation in activities while travelling abroad in the last 12 months
Parents of adolescents & young adults (15-24)



56%

Travelled as part of a large group of five or more people



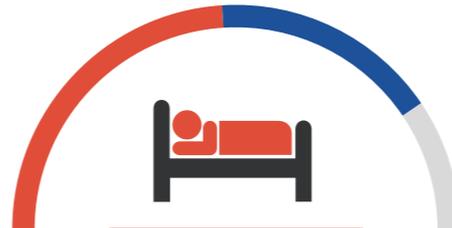
54%

Been on holiday organised through a school, college or university



49%

Stayed as a guest in someone's house



48%

Stayed in a hostel



44%

Participated in large public events



11%

Participated in large religious gatherings

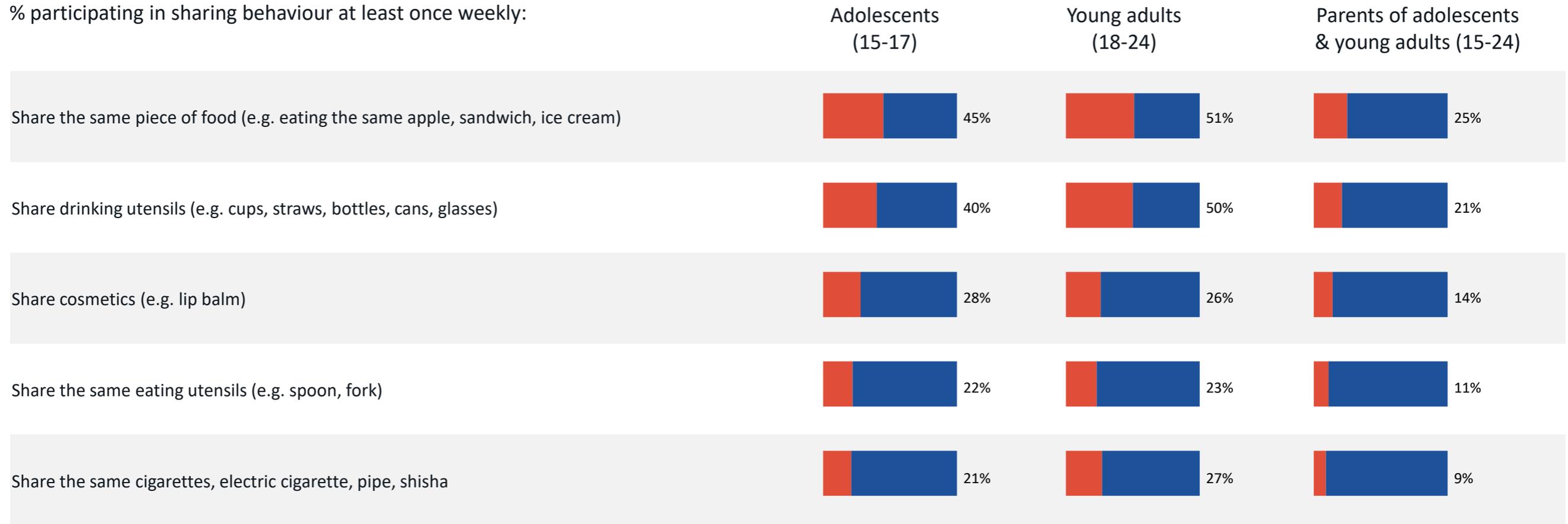
Yes- have done already

No – but would like to in future

Q11. Which, if any, of the following [ADOLESCENTS & YOUNG ADULTS: have you personally PARENTS: has your child/children] done when on holiday, within your own country or abroad, in the past 12 months? Base: all respondents: Parents of adolescents & young adults (15-24) (n=340) A, Y, P = statistically significant difference between groups at 95% CI (A=adolescents, Y=young adults, P=parents)

Sharing food at least once weekly is the item most commonly reported by both adolescents and young adults, followed by sharing drinking and eating utensils

% participating in sharing behaviour at least once weekly:



■ % associate

Q12. When spending time with friends, how often, if at all, do [ADOLESCENTS & YOUNG ADULTS: you PARENTS: your child/children, as far as you are aware,... Base: all respondents: Adolescents (15-17) (n=300); Young Adults (18-24) (n=300); Parents of adolescents & young adults (15-24) (n=340) A, Y, P = statistically significant difference between groups at 95% CI (A=adolescents, Y=young adults, P=parents)