

YouthView

Global report

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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-June 2018



Sample

	Total	France	Greece	Italy	Portugal	Spain
Adolescents (15-17 years)	1438	300	288	300	250	300
Young adults (18-24 years)	1501	300	301	300	300	300
Parents of adolescents/young adults	1621	330	317	333	301	340

Quotas & weighting

Quotas

Quotas were imposed to ensure national representation based on age, gender and region

Weighting

Corrective weights have been applied to bring the sample in line with the population profile. The data presented in this report have been weighted on two separate levels:

- 1. Country level distribution*:** To ensure national representation based on age, gender and region (across all three groups), for each market separately
- 2. Combined market-level distribution:** To ensure that each market is sufficiently represented according to its population profile. Calculated for all data presented at a 'Total level' (i.e. all five markets combined)

Combined market-level distribution



Adolescents
(15-17)

	Proportion for weighting
Greece	5%
Spain	21%
France	40%
Italy	28%
Portugal	6%



Young Adults
(18-24)

	Proportion for weighting
Greece	6%
Spain	23%
France	38%
Italy	28%
Portugal	5%



Parents of adolescents
& young adults (15-24)

	Proportion for weighting
Greece	6%
Spain	25%
France	32%
Italy	32%
Portugal	6%



**Total level (all
markets)**

The above combined market-level weighting distributions are relevant for all slides in this report marked 'Total level (all markets)', whereby the more densely populated countries (France, Italy, Spain) are awarded a greater 'weight' in terms of the responses given

Main findings

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Main findings: Overall summary

Most adolescents and young adults do not see themselves as being more at risk than other groups

- Awareness of meningococcal meningitis is **lower than other diseases**, with lower awareness amongst adolescents, and particularly young adults, compared to parents
- Only around one third of young adults and 4 in 10 adolescents **believe their age group is at higher risk** than the average population of contracting meningitis
- Almost two thirds of young adults (and 6 in 10 adolescents) aware of meningococcal meningitis are **not personally concerned** about catching it

Many social activities they engage in are not associated with risk either

- 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 awareness and general understanding is lower for meningitis compared with other diseases

- **Belief in receiving vaccinations** in general is **low**; one third of young adults do not believe in having all recommended vaccinations
- In comparison to other vaccine preventable diseases, perceived ability to be vaccinated against meningitis is **lower than other diseases**
- Amongst those aware of meningitis, only a **minority have considered getting the vaccine** for themselves/their children







Main findings: Country comparisons (1 of 3)

Most adolescents and young adults do not see themselves as being more at risk than other groups

Main finding

- Awareness of meningococcal meningitis is **lower than other diseases**, with lower awareness amongst adolescents, and particularly young adults, compared to parents
- Only around one third of young adults and 4 in 10 adolescents **believe their age group is at higher risk** than the average population of contracting meningitis
- Almost two thirds of young adults (and 6 in 10 adolescents) aware of meningococcal meningitis are **not personally concerned** about catching it

Country differences

- 

 • Awareness of meningococcal meningitis is **lowest in Portugal** (particularly among young adults) and **highest in Italy** (across all three groups - adolescents, young adults and parents)
- 

 • A significantly lower proportion of adolescents and young adults in **Portugal** believe that their age group is at a higher risk, whilst those in **Italy** report an overall higher awareness of this increased risk
- 

 • Adolescents and young adults in **France** are least concerned over personally catching meningitis, whilst almost 7 in 10 young adults in **Greece** report not being concerned

Main findings: Country comparisons (2 of 3)

Many social activities they engage in are not associated with risk either

Main finding

- 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

Country differences



- Both adolescents and young adults in **Italy** and **Spain** are most likely to be engaging in activities that put them at a heightened risk of contracting meningitis



- In contrast, those in **France**, and particularly **Portugal**, report a lower frequency of engaging in such activities



- Adolescents and young adults in **France** are least likely to associate most activities with a heightened risk of contracting meningitis



- However, there is a **greater awareness** of the risks associated with the various activities amongst those in **Italy**









Main findings: Country comparisons (3 of 3)

Vaccination awareness and general understanding is lower for meningitis compared with other diseases






Main finding

- **Belief in receiving vaccinations** in general is **low**; one third of young adults do not believe in having all recommended vaccinations
- In comparison to other vaccine preventable diseases, perceived ability to be vaccinated against meningitis is **lower than other diseases**
- Amongst those aware of meningitis, only a **minority have considered getting the vaccine** for themselves/their children






Country differences

- Belief in vaccination is **lowest in France** (for adolescents, young adults and parents), whilst those in **Portugal** exhibit the overall strongest belief in vaccination in general
 - 
 - 
- More than half of adolescents in **Spain** and over 7 in 10 young adults in **Greece** do not think it possible or don't know that is possible to be vaccinated against meningitis (concurrent with the lower awareness reported by parents in these markets), whilst there is generally good awareness of the vaccine in **Italy**
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- The majority of adolescents and parents in **France** have not considered vaccination against meningitis (for themselves or their children, respectively). In contrast, two thirds of parents and almost half of adolescents in **Portugal** have considered being vaccinated against the disease (a similar proportion to that seen amongst young adults in **Italy**)
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Main findings: Country comparison summary

	 France	 Greece	 Italy	 Portugal	 Spain
Awareness of meningococcal meningitis	Moderate (>65% in all groups)	Moderate (>70% in all groups)	Very high (>80% in all groups)	Low (lowest across all groups)	Moderate (>70% in all groups)
Agreement with statement: <i>Adolescents and young adults are at higher risk than the average population to contract meningococcal meningitis</i>	Moderate (>35% in all groups)	Moderate (>25% in all groups)	High (>40% in all groups)	Low (<30% agreement in all groups)	Moderate (>25% in all groups)
Concern over contracting meningitis	Very low (especially for adolescents, >60% not concerned)	Low (especially for young adults, >60% not concerned)	Moderate (>40% not concerned)	Moderate (>35% not concerned)	High (for parents, >65% concerned)
Frequency of engaging in activities with associated risk for contracting meningitis	Low	Moderate	High	Low	High
Association of activities engaged in with risk for contracting meningitis	Low	Moderate	High	Moderate	Moderate
Overall belief in vaccination	Very low (<65% agreement, adolescents, young adults)	Moderate (>65% agreement, adolescents, young adults)	Moderate (>75% agreement, adolescents, young adults)	High (>85% agreement, all groups)	Moderate (>75% agreement, adolescents, young adults)
Awareness of possibility to be vaccinated against meningitis	Moderate (>60% awareness, adolescents, parents)	Low (<50% awareness, young adults, parents)	High (>70% awareness, all groups)	Moderate (>65% awareness, adolescents, parents)	Low (<50% awareness, adolescents, young adults)
Current consideration for meningitis vaccine	Low (<20% adolescents, young adults)	Moderate (>25% all groups)	High (>40% adolescents, >50% young adults)	High (>65% parents, >45% adolescents)	Very low (<15% adolescents, young adults)

Main findings: Implications

	Overall country profile	Implications – future strategy
	Representing the market that is least engaged with vaccination in general, together with lower overall association of risk factors contributing to contracting meningitis, France poses a challenge for Pfizer...	Efforts for this market should focus on building awareness of the risk factors for meningococcal meningitis, and in doing so increasing understanding surrounding contracting the disease to widen potential vaccination appeal and uptake.
	A low overall concern over contracting meningitis (particularly among young adults), along with a low reported awareness of the possibility to be vaccinated...	Similar to France, increasing the overall understanding with regard to meningitis in general (the disease itself, risk factors, possibility to be vaccinated) will help support the case of vaccination here.
	Representing the 'highest potential' market, results indicate that the majority of the population is already aware of the dangers of contracting meningitis; there is already a high consideration for vaccination even among those not vaccinated...	In order to cement meningitis as a 'must have' vaccination, the key objectives in Italy should be continued education, together with taking action on the already-instilled awareness and the high intent to vaccinate.
	Portugal represents a sizeable opportunity for Pfizer; while there is low overall awareness for meningitis and its risk factors, there is a strong belief in vaccination , as well as an already high consideration for the meningitis vaccine...	Harnessing the strong belief in vaccination will be crucial in this market (particularly among parents), as will building awareness of the disease in line with other vaccine-preventable diseases.
	Whilst those in Spain demonstrate a strong concern for contracting meningitis, together with a high participation rate for the various risk factors, there is little to no consideration for the vaccine at present...	The focus for Spain should be to promote the association between the various risk factors and contracting the disease, together with increasing awareness of the availability of the vaccine.

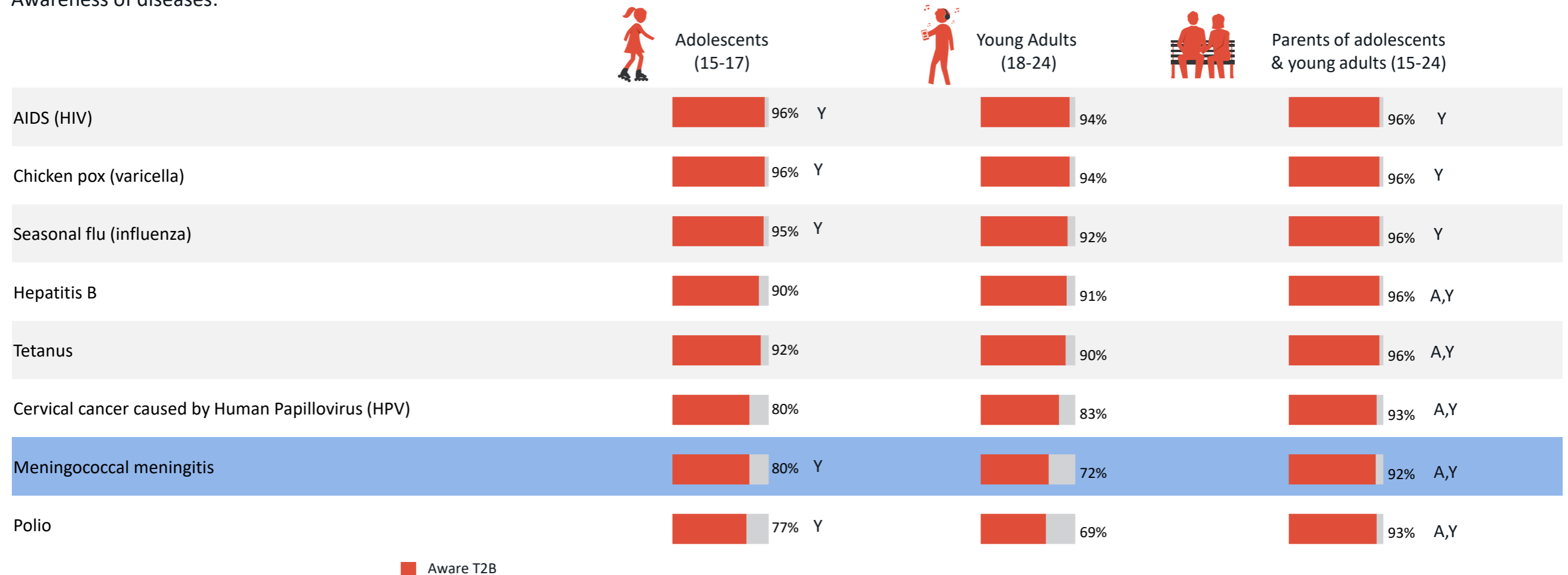
Awareness and perceptions of meningococcal meningitis



Total level (all markets)

In the context of other diseases, awareness of meningococcal meningitis is lower than other diseases, particularly amongst young adults

Awareness of diseases:

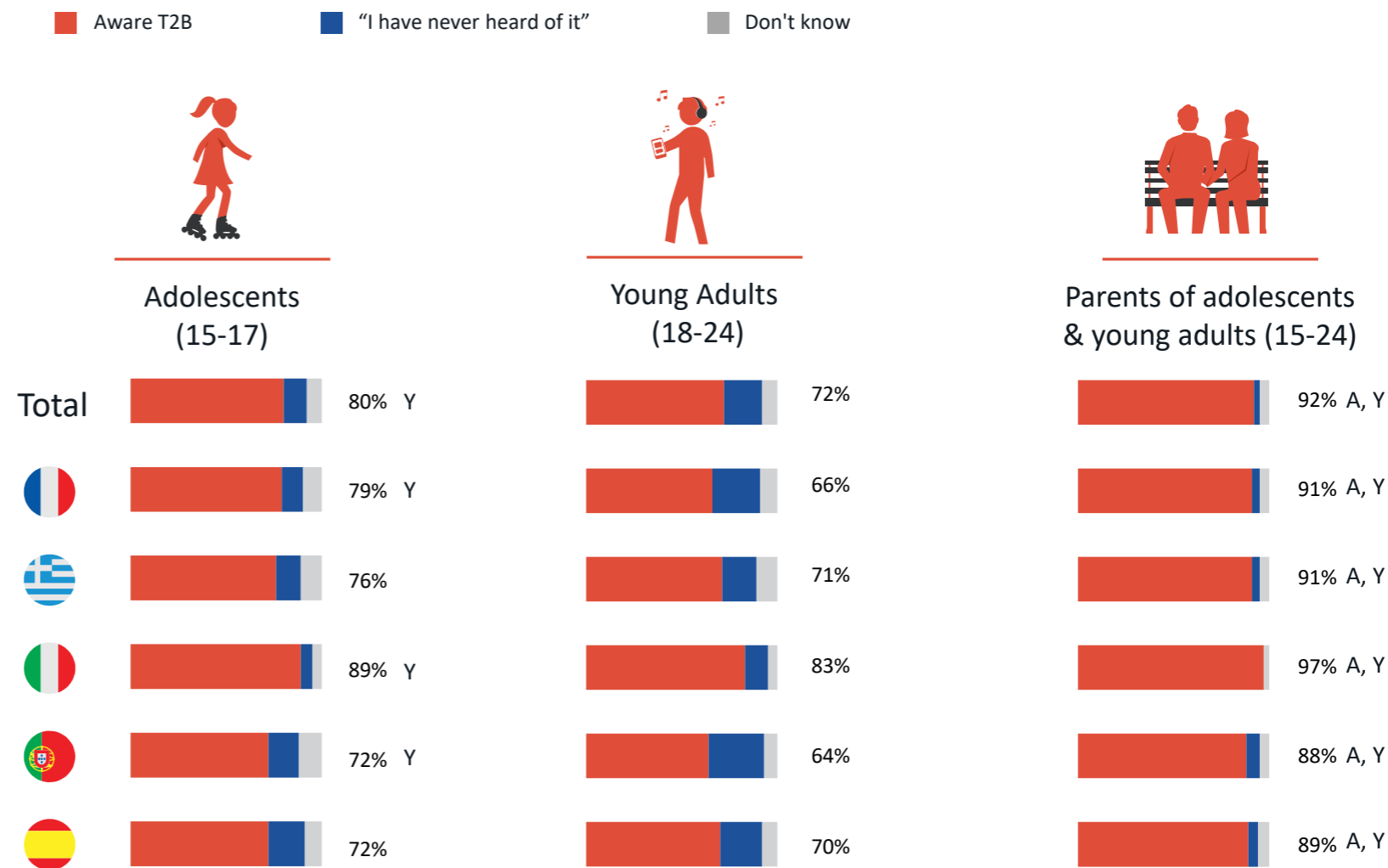


Q15. Which of the options below best describes your awareness of the following diseases: "I have never heard of it", "I have heard of it but don't know what it is", "I know what it is", "Don't know", "Prefer not to answer" Base: all respondents; Adolescents (15-17 years) (n=1438); Young Adults (18-24 years) (n=1501); Parents of adolescents & young adults (15-24) (n=1621); A, Y, P = statistically significant difference between groups at 95% CI (A=adolescents, Y=young adults, P=parents)

In general **awareness of meningitis is lower for young adults** compared to adolescents. In France, Italy and Portugal, adolescents have significantly greater awareness than young adults

Across all markets parents have significantly greater awareness of meningococcal meningitis than adolescents and young adults

Awareness of meningococcal meningitis:



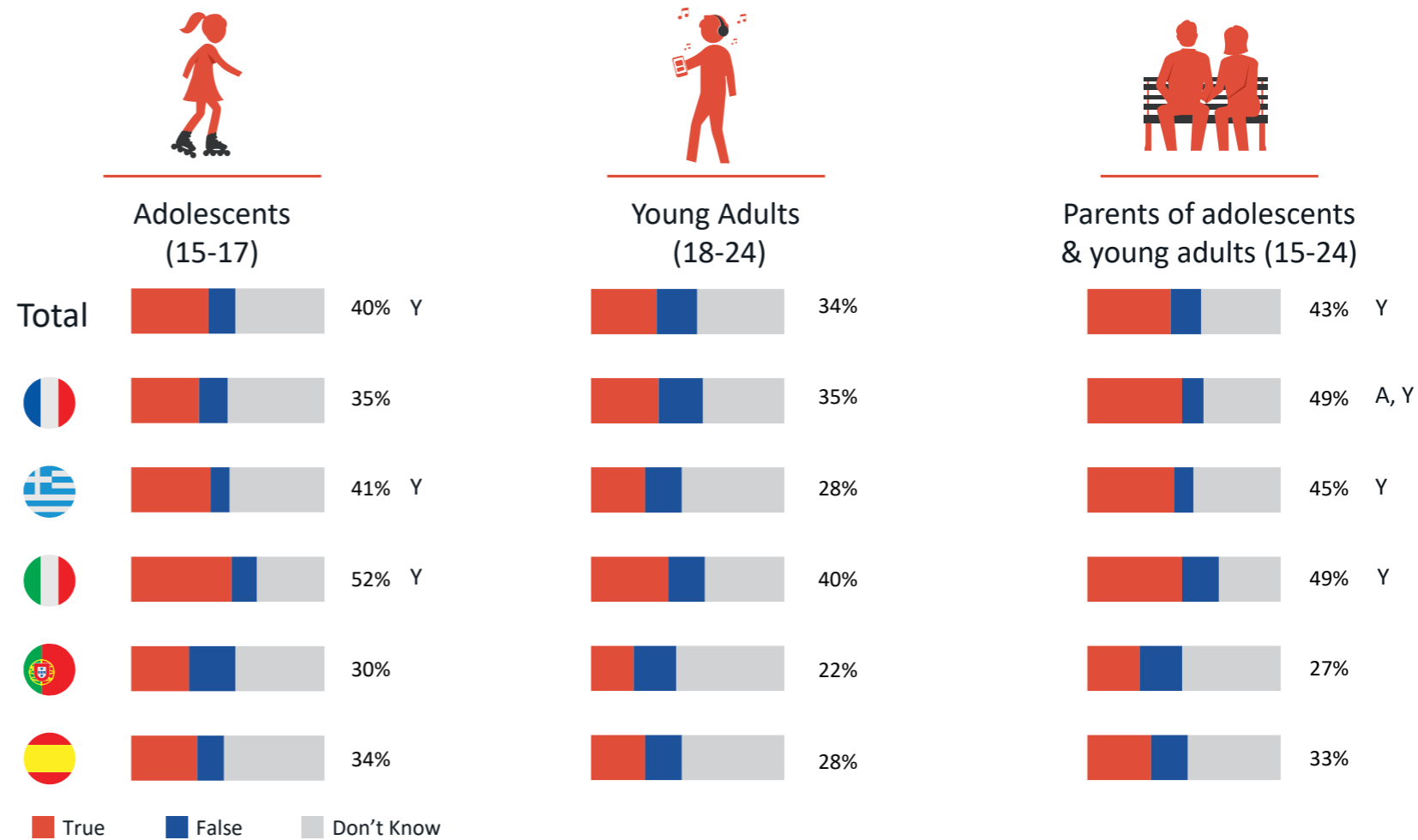
Looking at perceptions of risk, across groups a **majority don't agree or don't know whether adolescents or young adults are at greater risk** of contracting meningitis

Fewer young adults perceive their age group to be at greater risk - a greater proportion of parents and adolescents agree that adolescents and young adults are at higher risk

In Greece and Italy this difference is significant. In France, parents have significantly greater agreement than both adolescents and young adults

Agreement with the statement:

"Adolescents and young adults are at higher risk than the average population to contract meningococcal meningitis"





Total level (all markets)

More than a **third of adolescents and young adults either don't agree or don't know that vaccines can help prevent** different types of meningitis or that it is a **life threatening infection**; over a quarter of parents don't agree or know

Agreement with the statements:



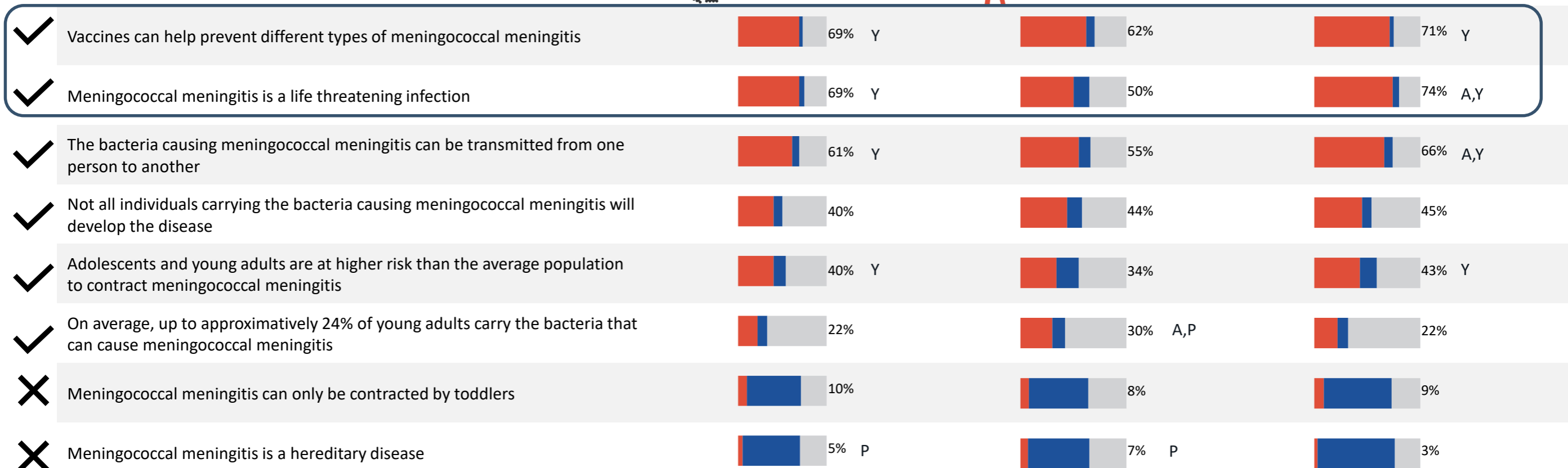
Adolescents
(15-17)



Young Adults
(18-24)



Parents of adolescents
& young adults (15-24)



✓ True statements

✗ False statements

True

False

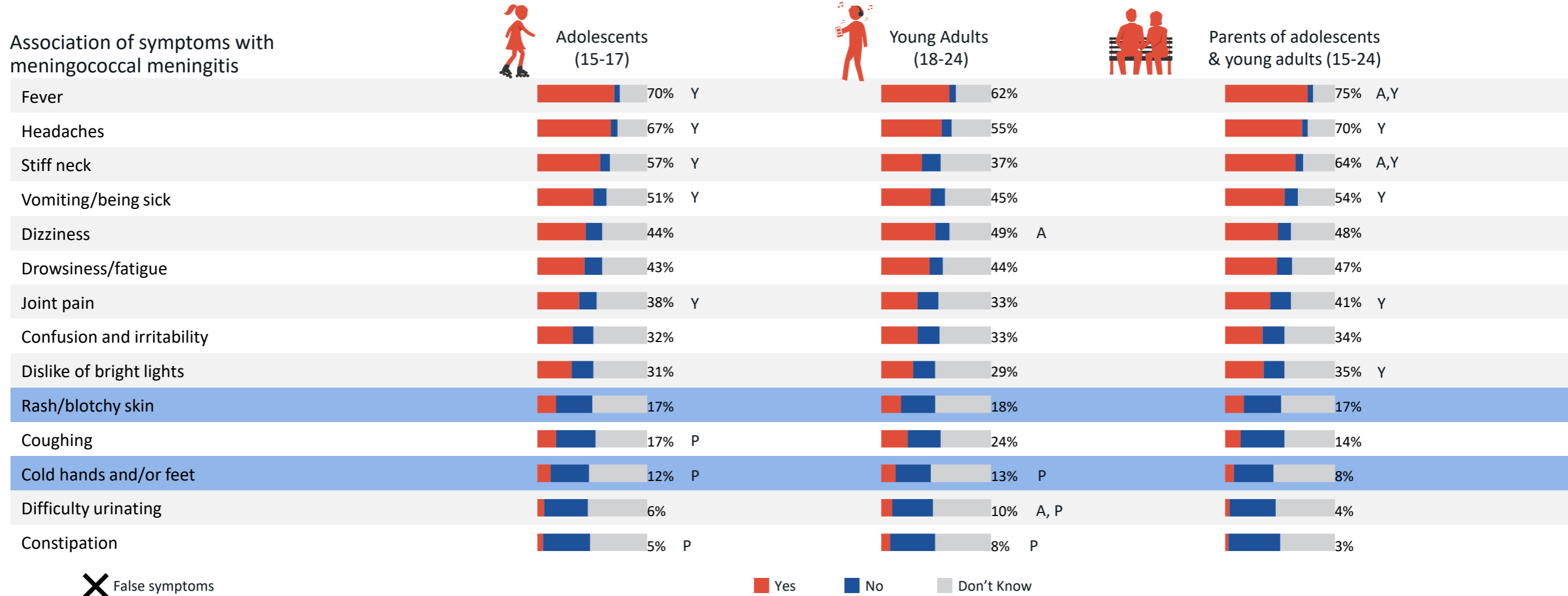
Don't Know

Q20. Please indicate which of the following statements you think is true or false. Base: Aware of Meningitis: Adolescents (15-17 years) (n=1149); Young Adults (18-24 years) (n=1081); Parents of adolescents & young adults (15-24) (n=1491). A, Y, P = statistically significant difference between groups at 95% CI (A=adolescents, Y=young adults, P=parents)



Total level (all markets)

The majority of **adolescents, young adults and parents** do not associate or do not know that symptoms like **cold hands/feet** and **rash/blotchy skin** are linked to meningococcal meningitis



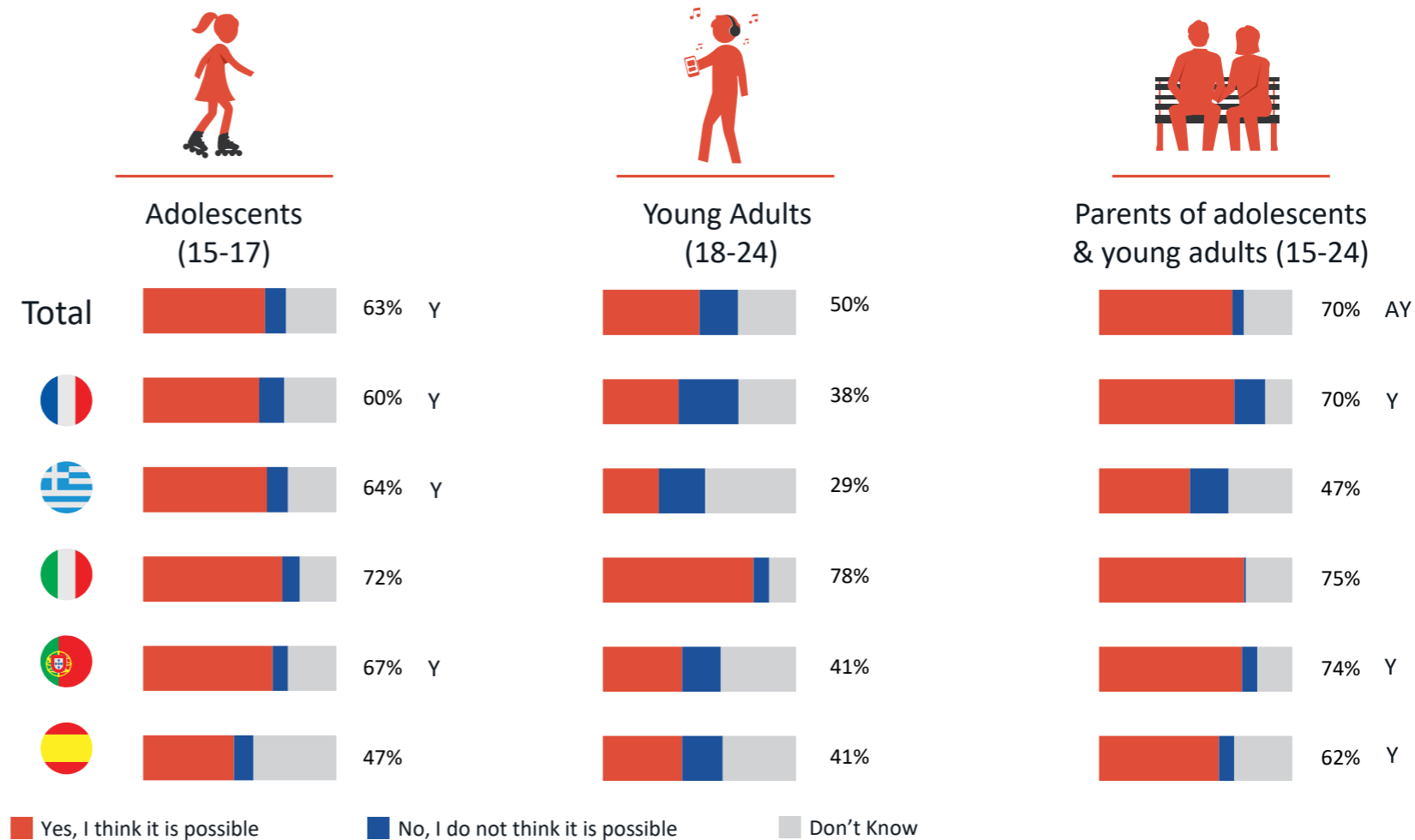
Across all markets, except Italy, **awareness of the meningococcal meningitis vaccine is lower amongst young adults** than parents and adolescents

Amongst **young adults**, awareness of the vaccination is **lowest in Greece**, with over 7 in 10 who don't know or think it is not possible to be vaccinated against the disease

Overall awareness of the vaccine is **highest in Italy** compared to the other markets

Awareness of possibility to vaccinated against meningitis:

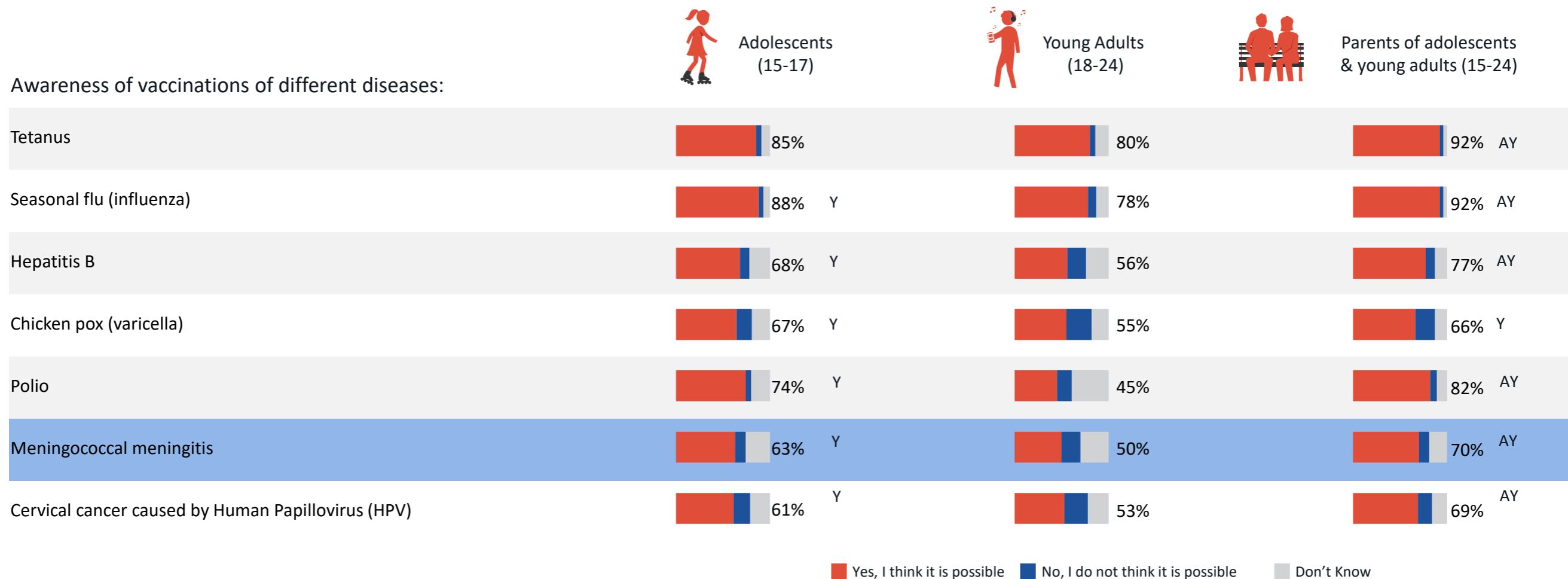
(GR, IT, ES: amongst those not vaccinated; FR, PT: amongst those aware of meningococcal meningitis)





Total level (all markets)

Across all groups, a smaller proportion think it possible to be vaccinated against meningococcal meningitis compared to other diseases



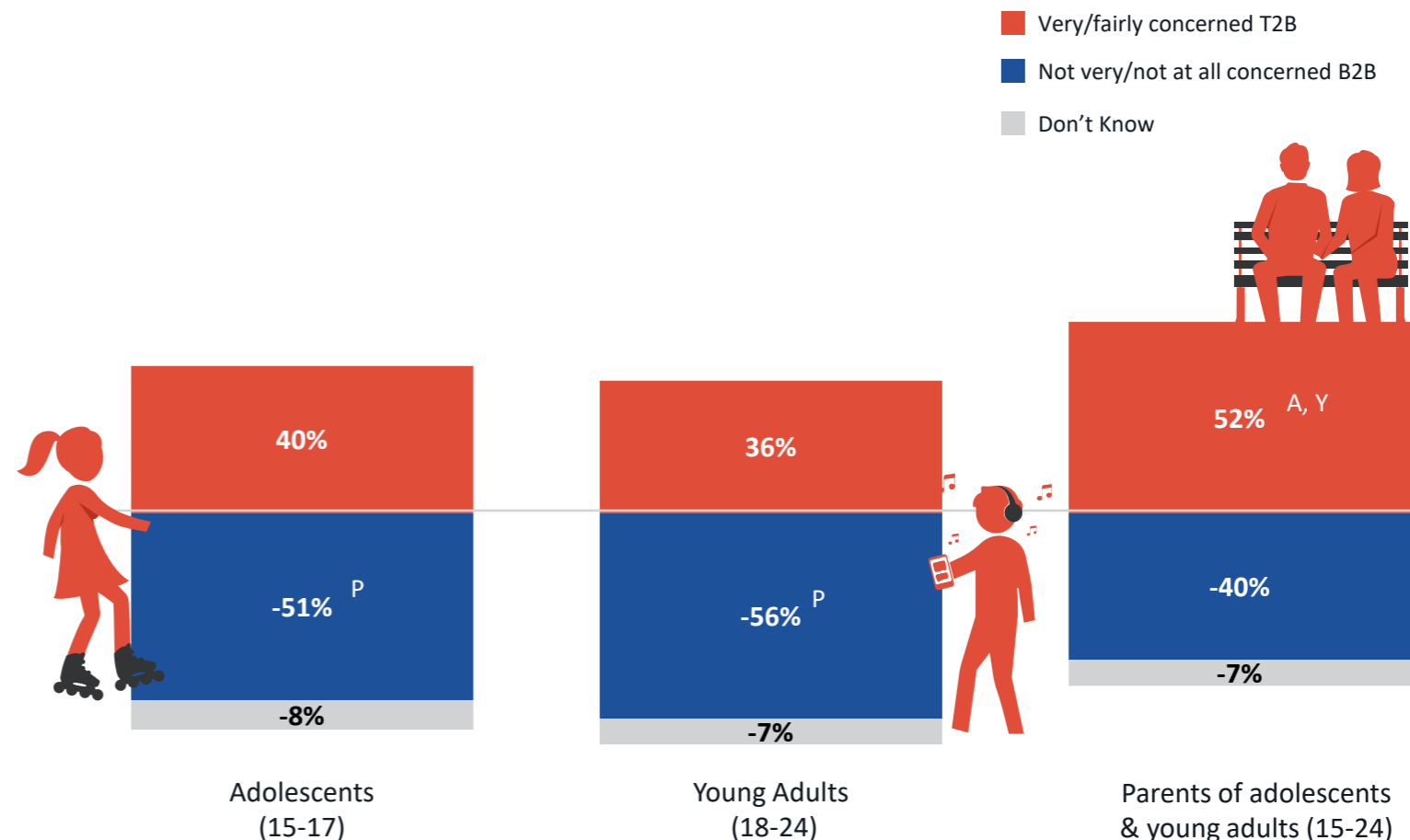


Total level (all markets)

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

Concern is slightly greater amongst parents, with just under half of those aware of meningococcal meningitis not concerned about their children catching it

Concern about themselves/their children catching meningococcal meningitis:



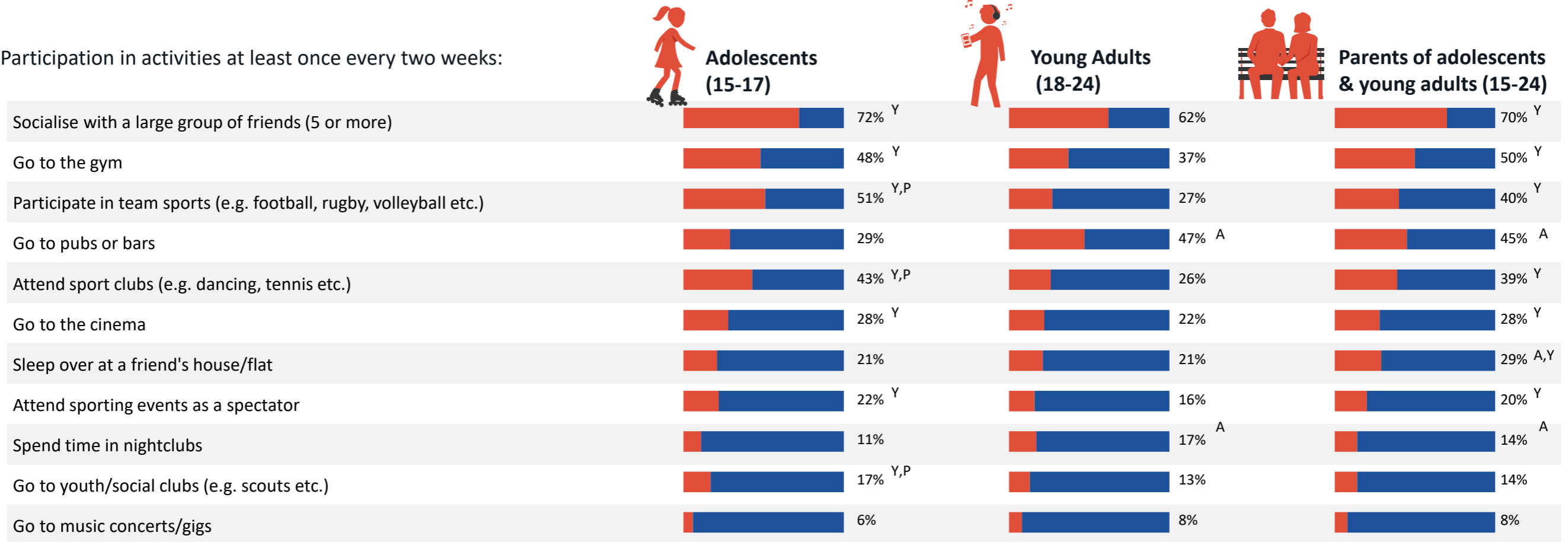
Behaviours related to meningococcal meningitis



Total level (all markets)

Overall, **adolescents partake in the various activities more frequently** compared with young adults (particularly sporting activities), whilst **young adults are more likely to frequent pubs, bars & nightclubs**

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) Total: (n=1438), France (n=300), Greece: (n=288), Italy: (n=300), Portugal: (n=250), Spain: (n=300). Young Adults (18-24) Total: (n=1501), France (n=300), Greece: (n=301), Italy: (n=300), Portugal: (n=300), Spain: (n=300). Parents of adolescents & young adults (15-24) Total: (n=1621), France (n=330), Greece: (n=317), Italy: (n=333), Portugal: (n=301), Spain: (n=340).

A, Y, P = statistically significant difference between groups at 95% CI (A=adolescents, Y=young adults, P=parents)



Two-thirds of young adults and just over half of adolescents plan to travel abroad within the next 12 months

Across all markets, **young adults exhibit a higher intent to travel** abroad compared to that seen for adolescents

In Spain, there is somewhat of a disconnect between the travel plans of both adolescents and young adults, compared to what their parents predict

% planning to travel abroad in the next 12 months :



Total level (all markets)

Total

51%

68%^{A, P}

52%



47%

68%^{A, P}

51%



37%

50%^A

47%^A



60%

77%^{A, P}

63%



38%

52%^{A, P}

37%



55%^P

65%^{A, P}

46%



Total level (all markets)

In the past year, **just over half of adolescents and young adults have travelled abroad**, which is slightly higher than what their parents believe to be the case

Adolescents in **Spain** are most well travelled overall, followed by **Italy** and **France**, which is also true of young adults

% who have travelled abroad in past 12 months:



Adolescents
(15-17)



Young Adults
(18-24)



Parents of adolescents
& young adults (15-24)

Total

54%

56%^P

51%



53%

59%

55%



29%

34%

41%^A



56%

57%

57%



49%^P

48%^P

38%



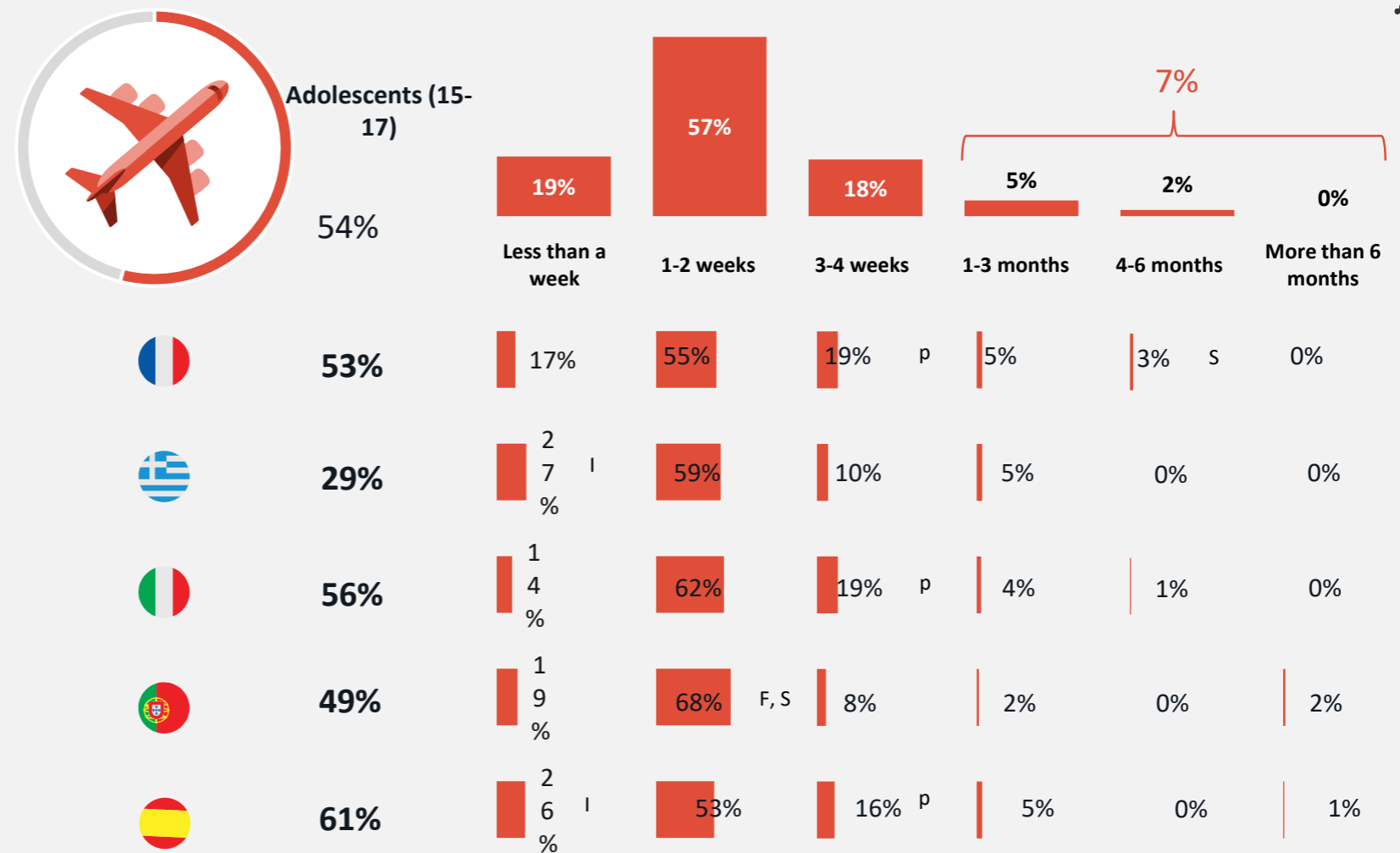
61%^P

58%^P

46%

For the majority of adolescents that have been abroad in the last 12 months, most trips are short-term (1-2 weeks), although **1 in 5 report a slightly longer duration (3-4 weeks)**

% who have travelled abroad in past 12 months – duration of trip:



Although most travel is short term, a **fifth of young adults have travelled abroad for a period of one month or more** in the last 12 months

Young adults in France report the **longest duration of travel** in general; 1 in 4 report having been away for one month or more in the last year

% who have travelled abroad in past 12 months – duration of trip:



Young Adults
(18-24)

56%



59%



34%



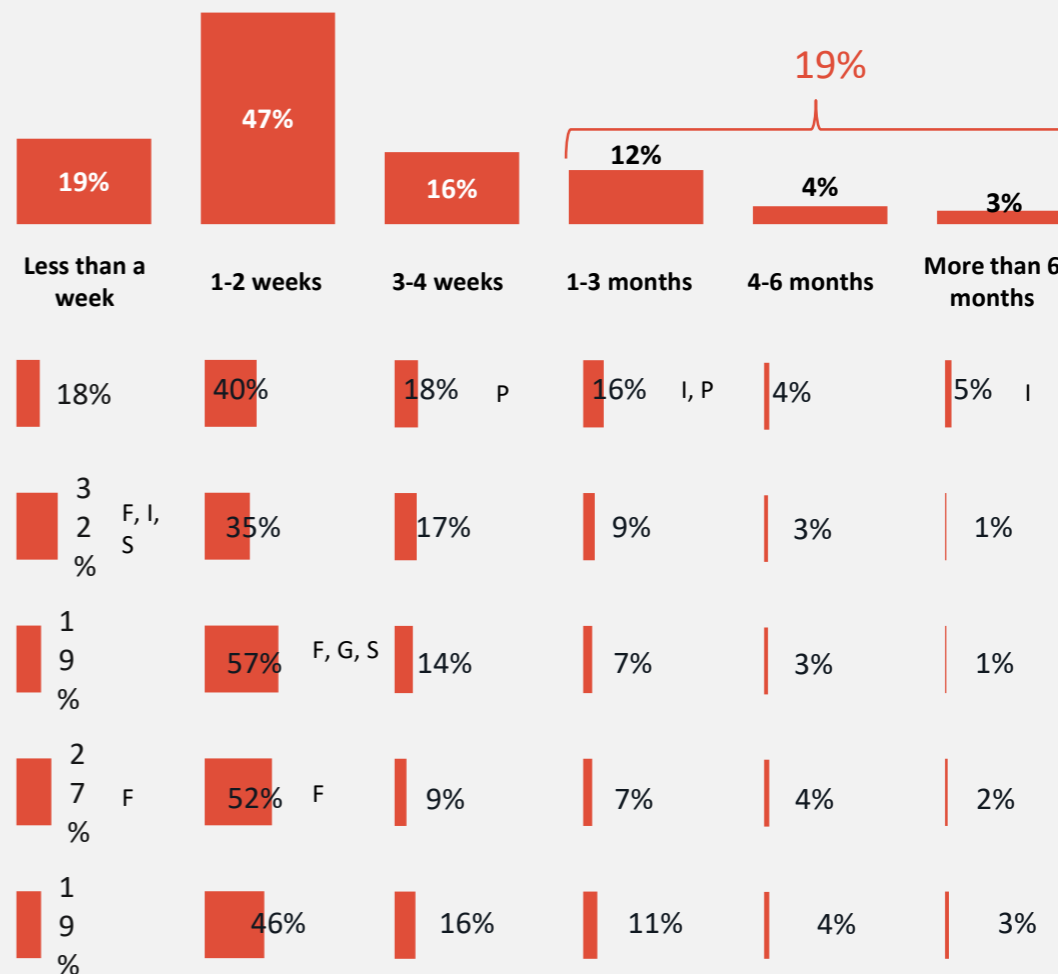
57%



48%



58%



Just over a **half of adolescents have stayed as a guest in someone's house** whilst on holiday in the last 12 months

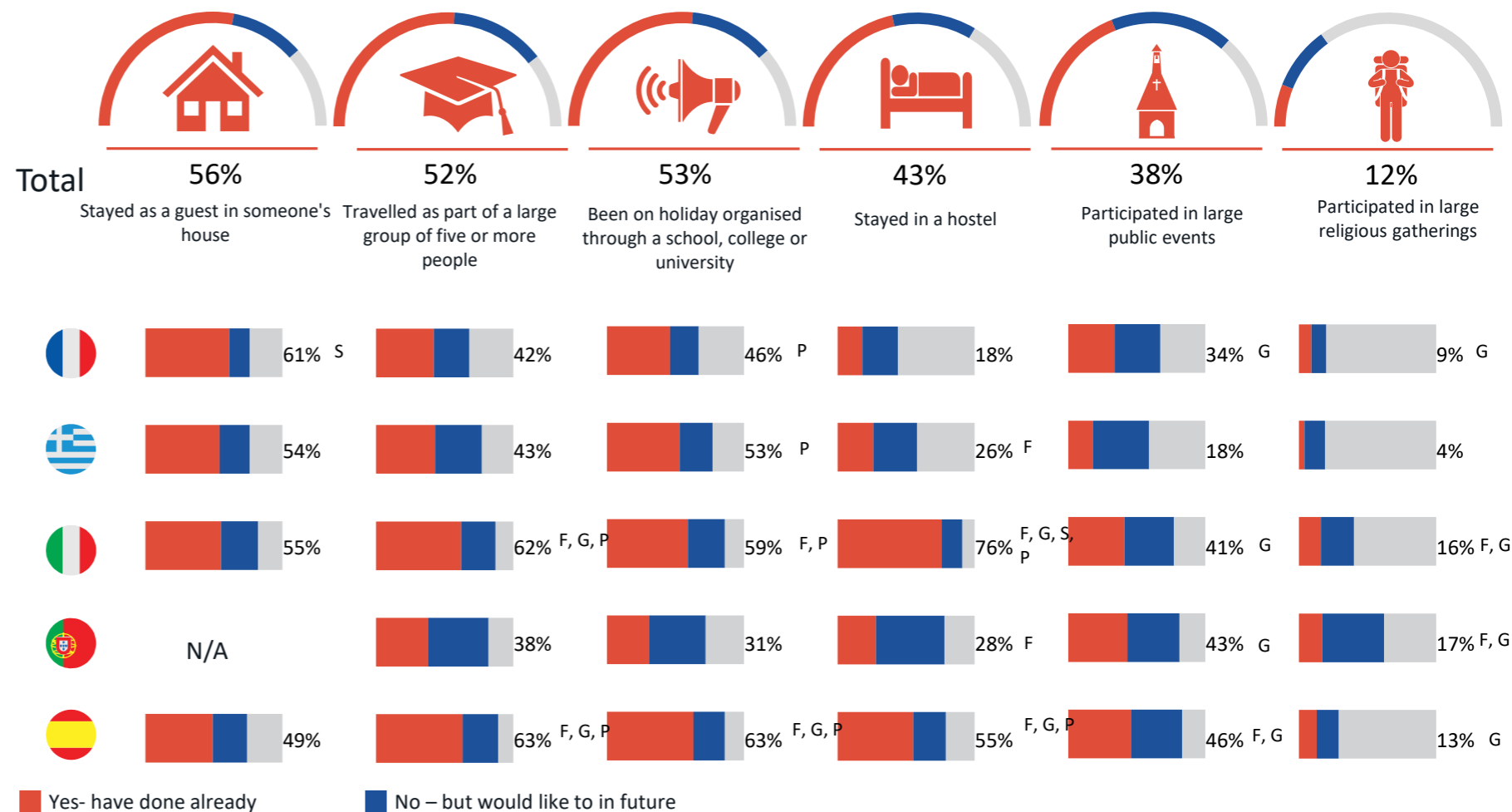
In addition, a similar proportion have travelled as part of a **large group** or have been abroad as part of a **school trip**

Travelling abroad on school trips or in large groups is more commonplace in **Spain and Italy**



Participation in activities whilst on holiday in the last 12 months

Adolescents (15-17 years)

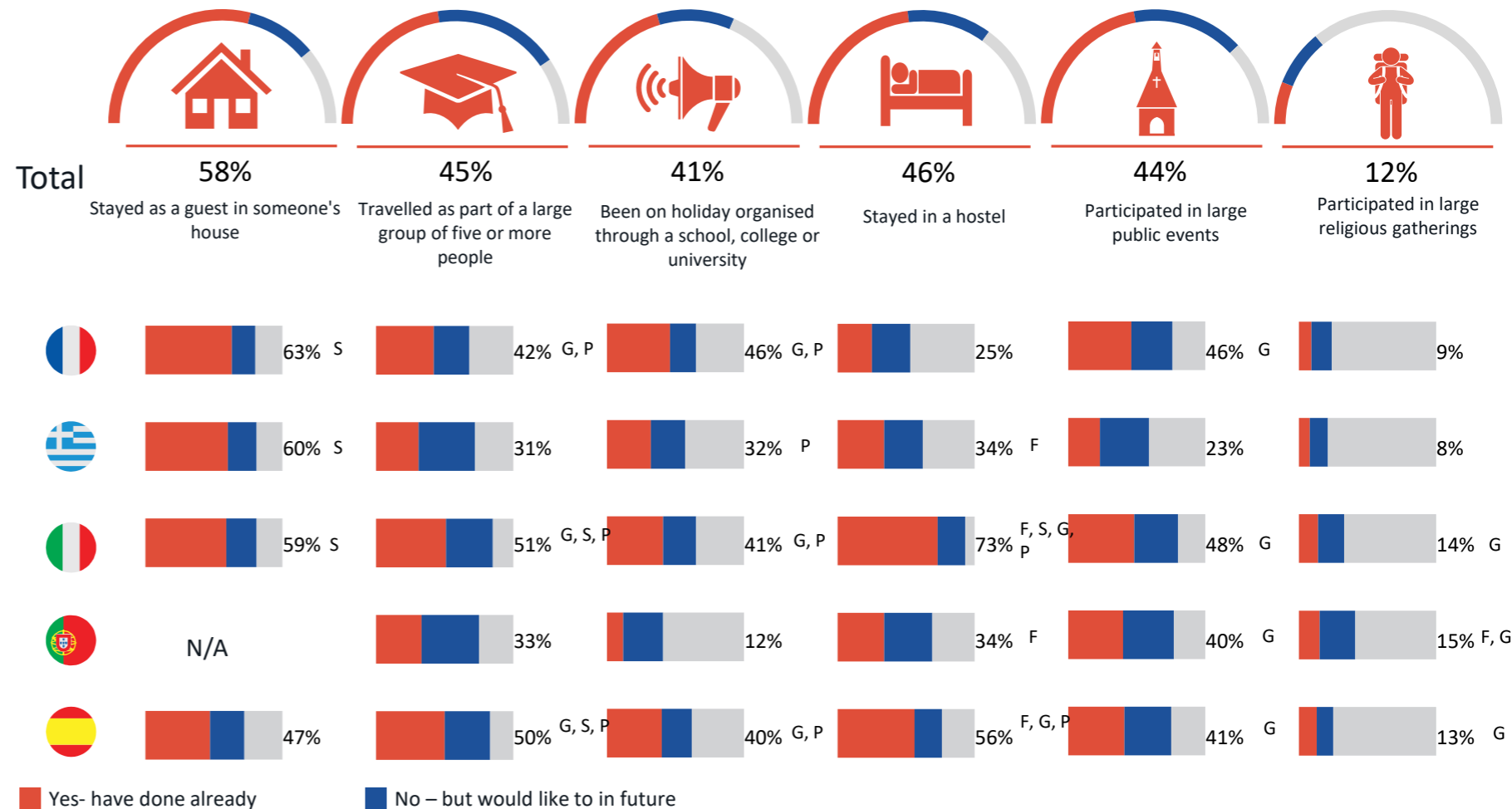


Similarly for young adults, almost 6 out of 10 (58%) have stayed as a **guest in someone's house** whilst on holiday in the last 12 months

Similar to that reported by adolescents, **young adults in Italy are more likely to have stayed in hostel accommodation** whilst abroad, compared to all other markets

Participation in activities while on holiday in the last 12 months

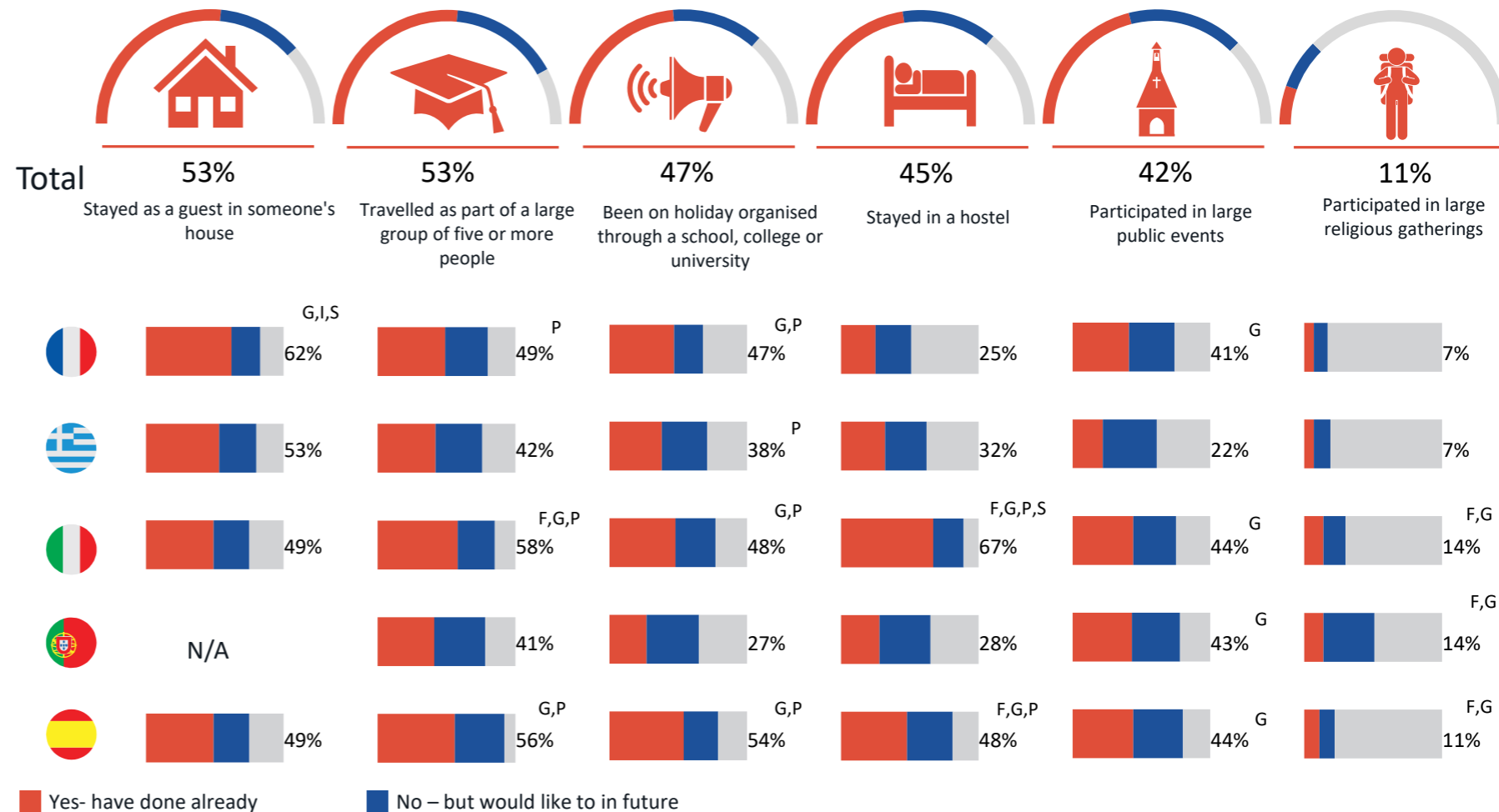
Young Adults (18-24 years)



Just **over half of parents** report that their children have **stayed as a guest in someone's house** or **travelled as part of a large group** in the last 12 months

Participation in activities while on holiday in the last 12 months (their children)

Parents of adolescents & young adults (15-24)





Total level (all markets)

Young adults report a higher level of engagement with the various sharing behaviours when compared to that seen of adolescents, and this is consistent across all markets

% participating in sharing behaviour at least once weekly:



Adolescents
(15-17)



Young adults
(18-24)



Parents of adolescents
& young adults (15-24)

Share the same piece of food (e.g. eating the same apple, sandwich, ice cream)



Share drinking utensils (e.g. cups, straws, bottles, cans, glasses)



Share cosmetics (e.g. lip balm)



Share the same eating utensils (e.g. spoon, fork)



Share the same cigarettes, electric cigarette, pipe, shisha



■ % associate

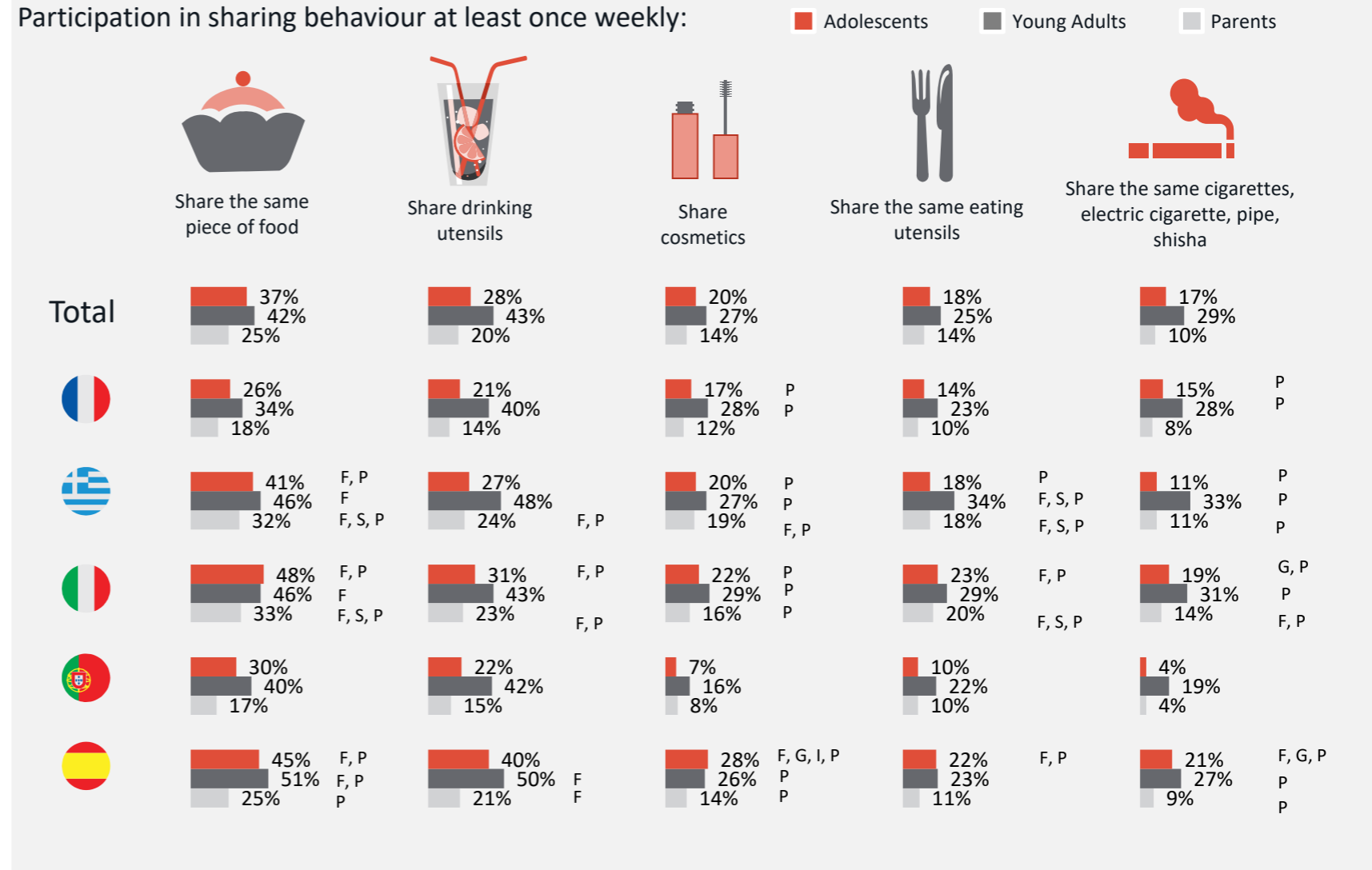
Q12. When spending time with friends, how often, if at all, do [ADOLESCENTS & YOUNG ADULTS: you PARENTS: your child/children, as far as you are aware,... Base: all respondents: Adolescents (15-17) (n=1438); Young Adults (18-24) (n=1501); Parents of adolescents & young adults (15-24) (n=1621) A, Y, P = statistically significant difference between groups at 95% CI (A=adolescents, Y=young adults, P=parents)

Focusing on sharing behaviours, **sharing food and drinking utensils** are the activities most commonly reported at least once weekly by both adolescents and young adults

In general, across the five countries, a **greater proportion of young adults share items** at least once a week than adolescents

Parents think their children share items less often than they actually report

Participation in sharing behaviour at least once weekly:

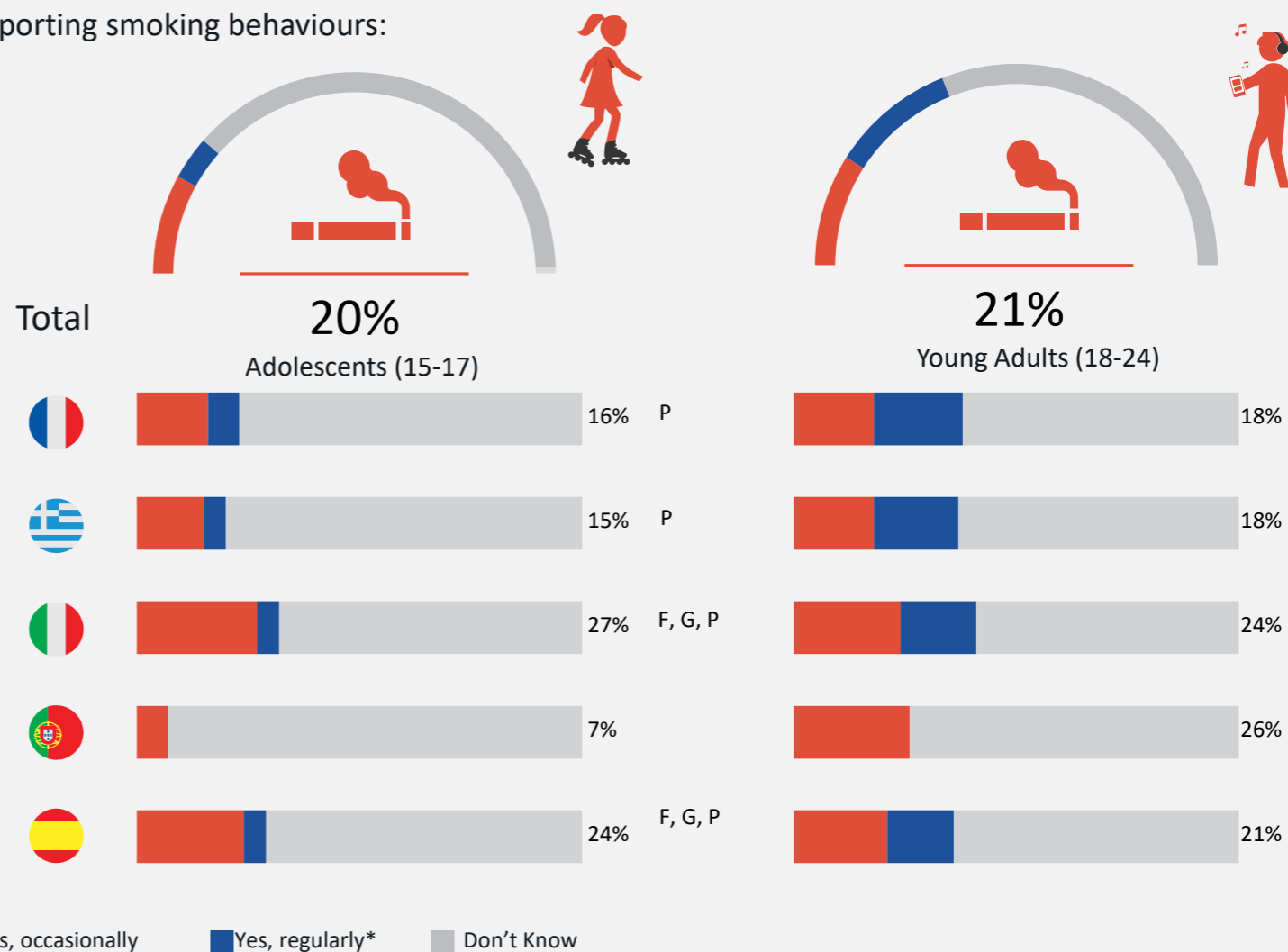


One fifth of both adolescents and young adults claim to **smoke at least occasionally**

Significantly more young adults (17%) than adolescents (6%) claim to smoke regularly

Whilst a higher proportion of adolescents in Italy and Spain smoke at least occasionally, among young adults, there is less differentiation between the markets in terms of reported smoking behaviour

% reporting smoking behaviours:



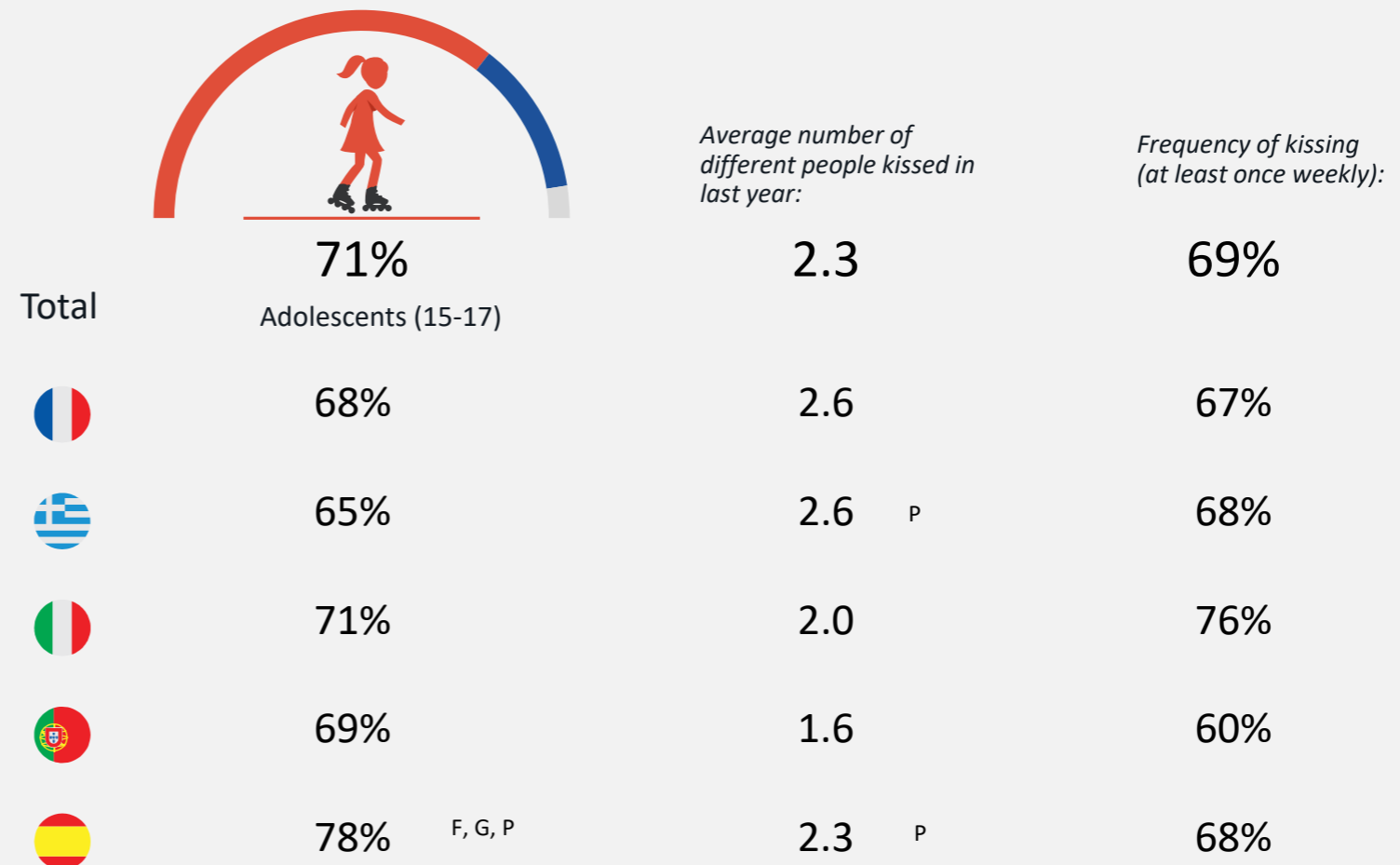
**Not an answer option in Portugal*

Just over **7 in 10 (71%)** adolescents report having intimately kissed someone, with the majority doing so at least on a weekly basis

A slightly higher proportion of adolescents in Spain report having ever kissed anyone, whereas those in Italy report a higher frequency of kissing overall

% who/whose children have intimately kissed someone:

Yes No Don't Know/no answer

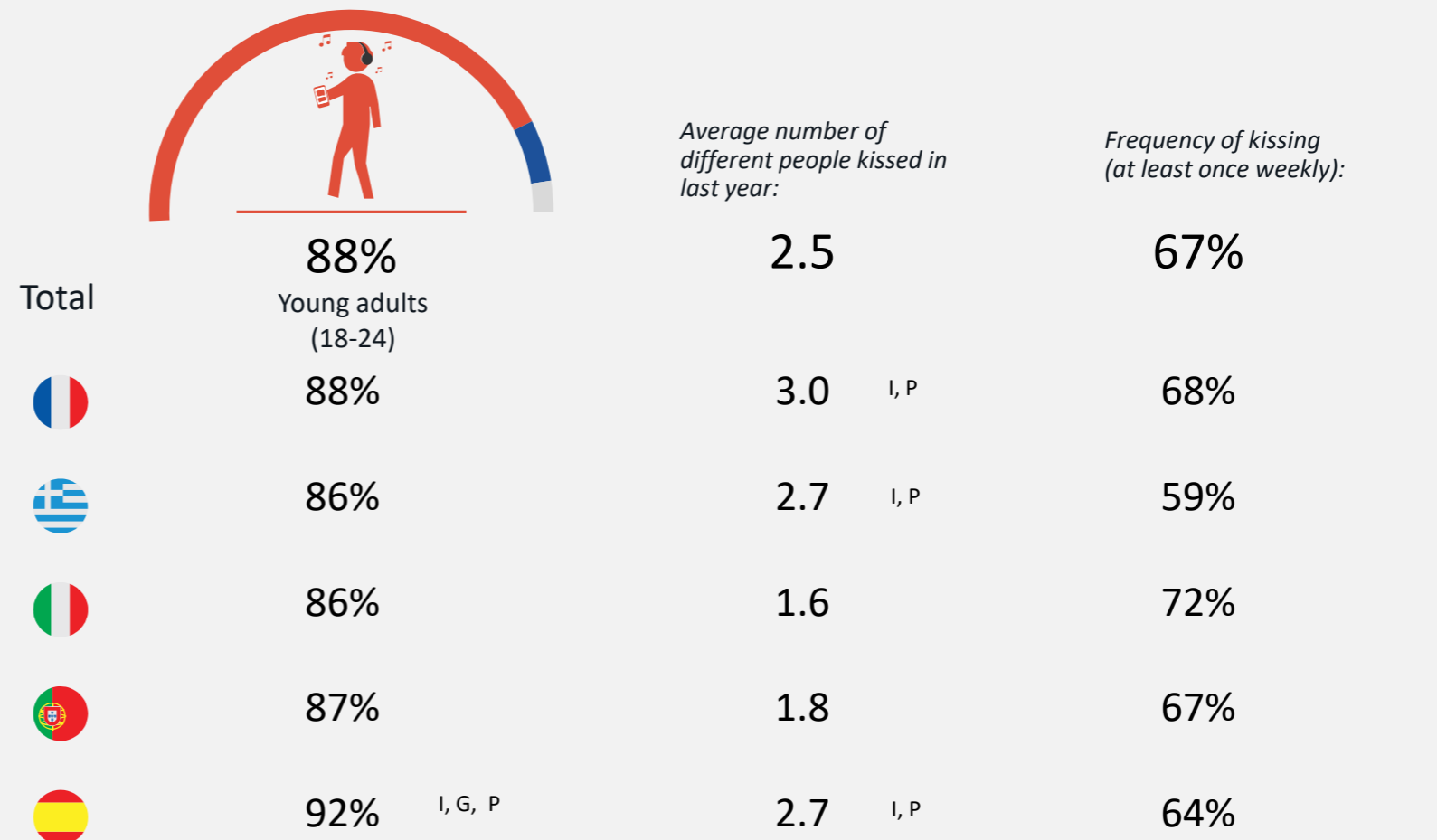


Almost all young adults (88%) report having intimately kissed someone

Whilst the proportion of young adults having kissed someone is similar across markets, those in France report a higher number of kissing partners; on average, 3 people in the last year (significantly higher than that reported in Italy)

% who/whose children have intimately kissed someone:

Yes No Don't Know/no answer

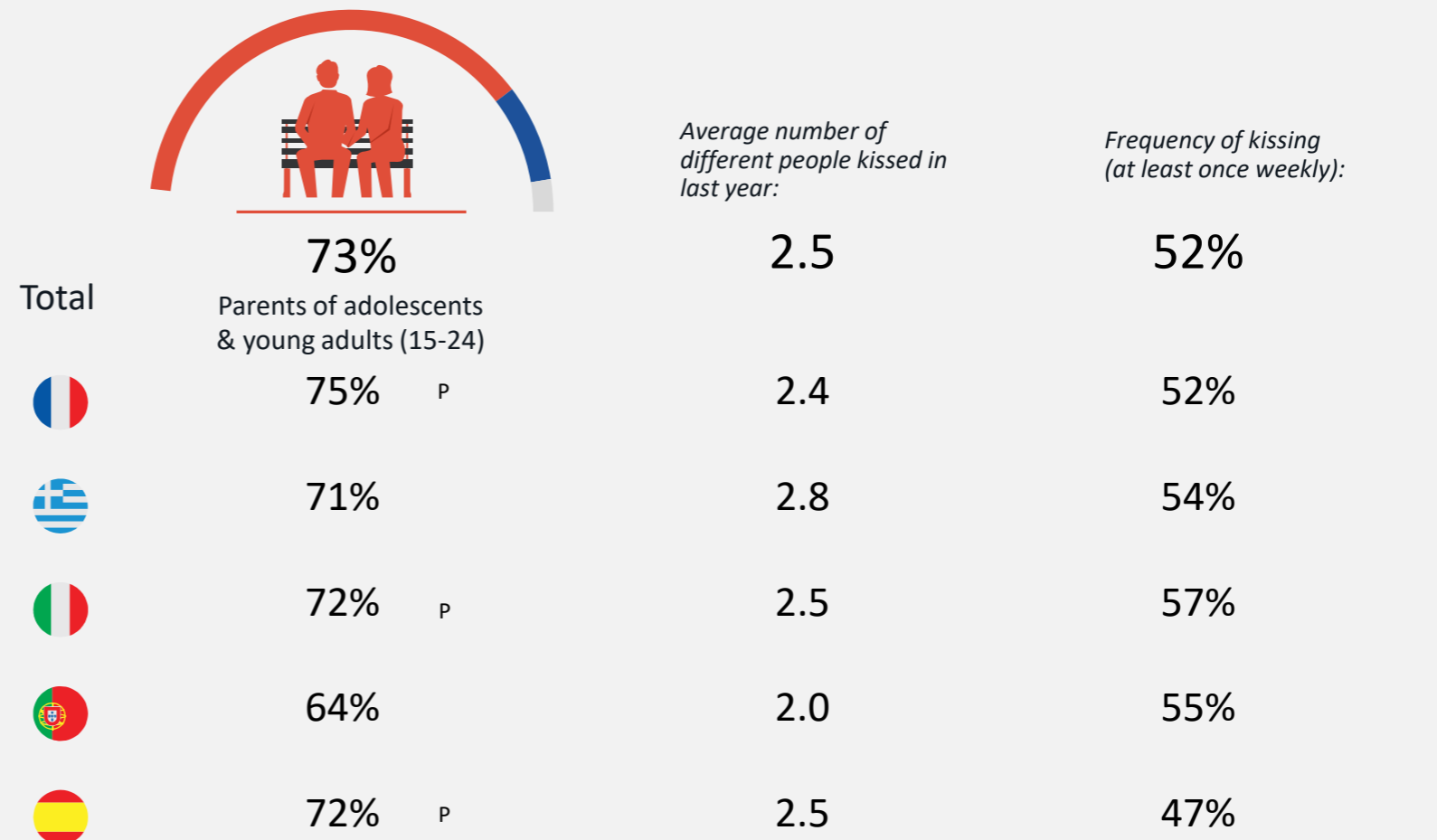


Almost three-quarters of parents (73%) believe that their children have intimately kissed someone

Compared with other countries, there is a slightly weaker belief from parents in Portugal that their children have ever intimately kissed someone

% who/whose children have intimately kissed someone:

Yes No Don't Know/no answer



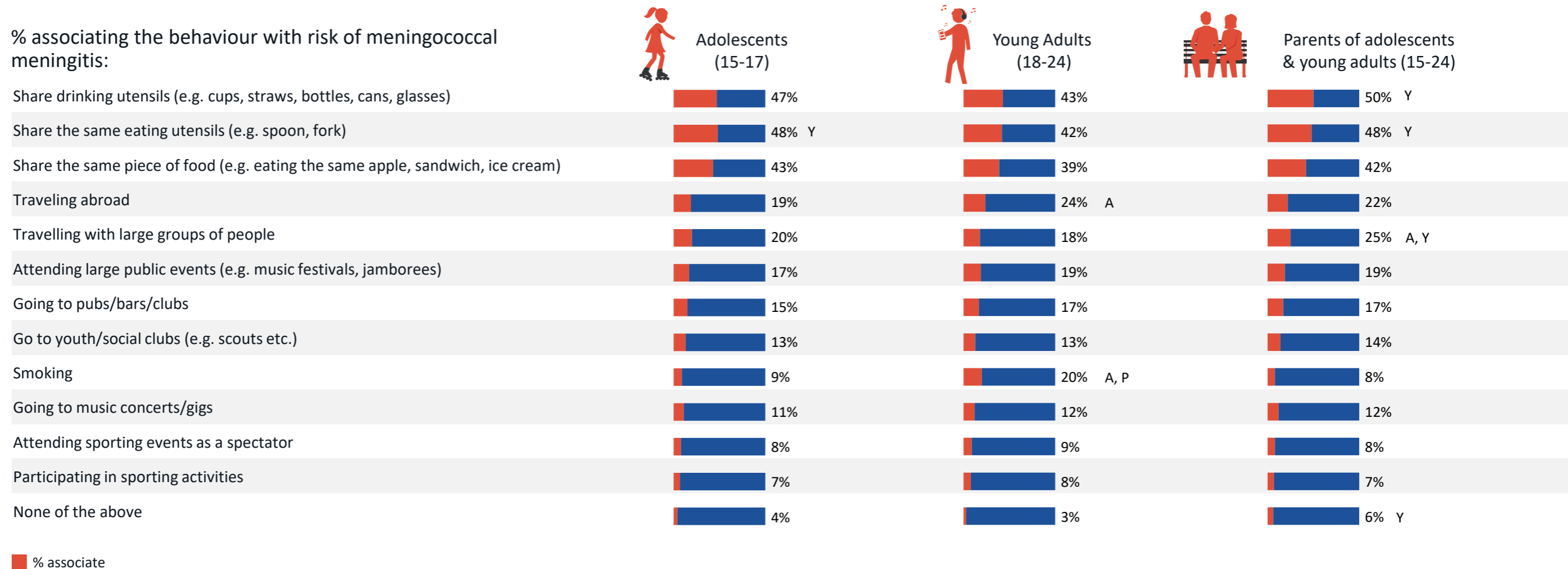
**Perceived level of risk for
behaviours**



Total level (all markets)

Most adolescents, young adults and parents do not associate many of the activities they/their children engage in with a higher than average risk of contracting meningitis

% associating the behaviour with risk of meningococcal meningitis:



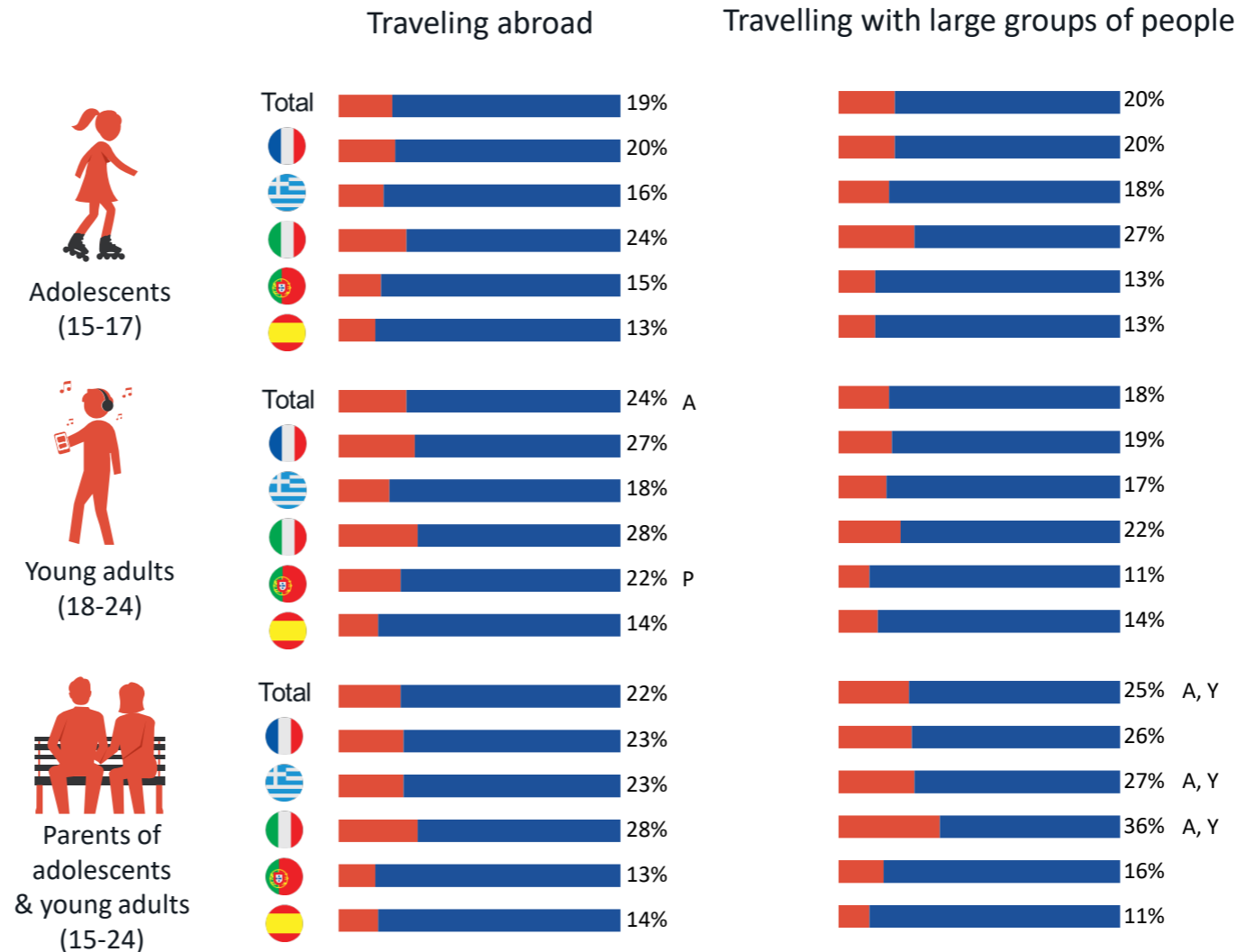
Q22. Which, if any, of the following situations listed below do you associate with a higher risk of contracting meningococcal meningitis than average? Base: Aware of Meningitis : Adolescents (15-17 years) (n=1149); Young Adults (18-24 years) (n=1081); Parents of adolescents & young adults (15-24) (n=1491)

Overall **only a minority** of people across the three groups **associate travel with an increased risk**

Generally association of travel with risk is **lower in Spain and Portugal**

Parents in Greece and Italy are significantly more likely to associate travelling with **large groups of people** with meningitis risk, than adolescents and young adults in these countries

Association of travel with meningitis risk:

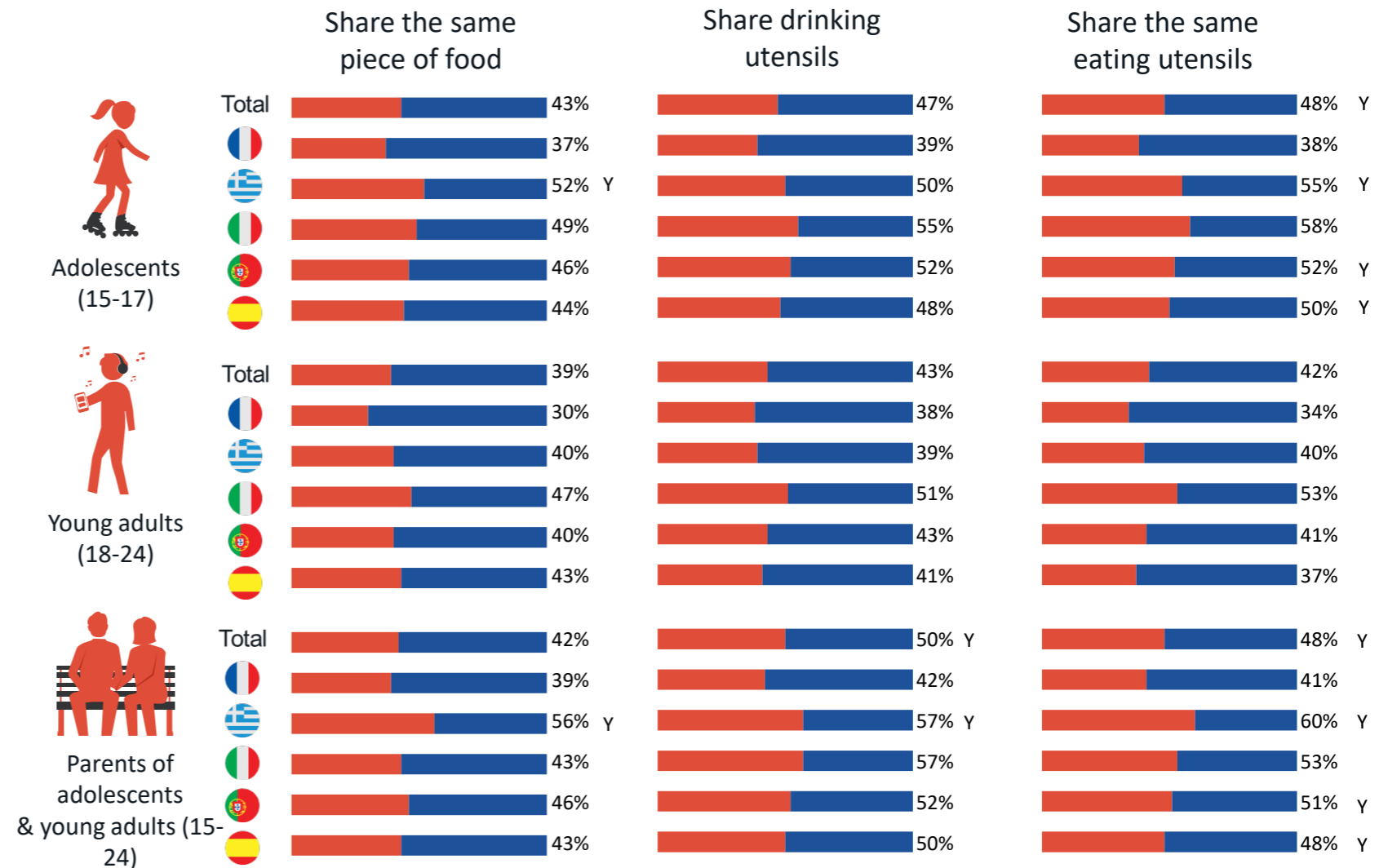


■ % participants

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 years) Total (n=1149); France : (n=237); Greece : (n=217); Italy : (n=268); Portugal : (n=180); Spain : (n=217); Young Adults (18-24 years) Total (n=1081); France : (n=1988); Greece : (n=214); Italy : (n=250); Portugal : (n=192); Spain : (n=210); Parents of adolescents & young adults (15-24) Total (n=1491); France : (n=301); Greece : (n=289); Italy : (n=323); Portugal : (n=264); Spain : (n=301). A, Y, P = statistically significant difference between groups at 95% CI (A=adolescents, Y=young adults, P=parents)

Young adults are less likely to associate sharing food or drinking/eating utensils with a higher risk of contracting meningitis, compared to adolescents and parents, across most markets

Association of sharing with meningitis risk:



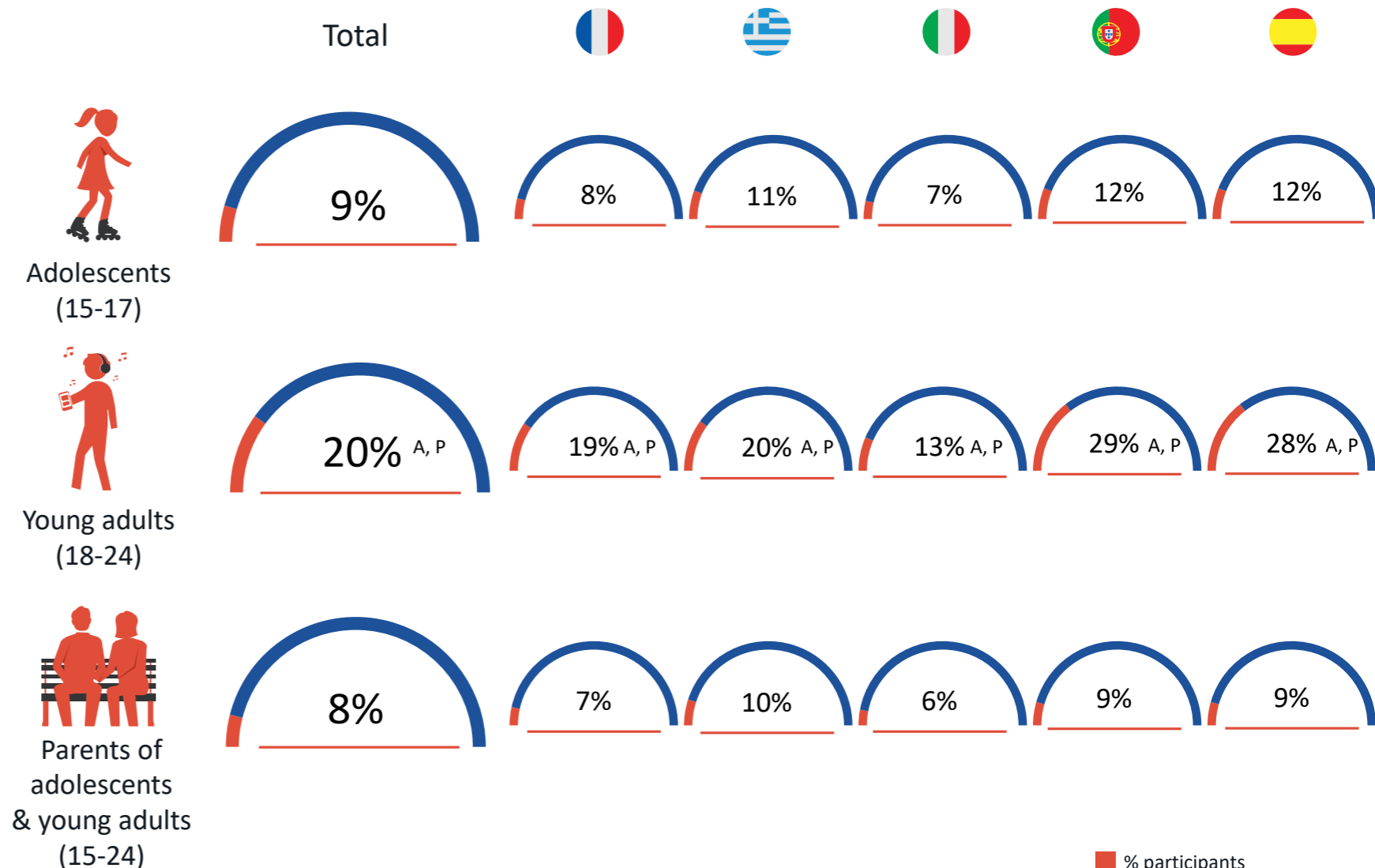
Q22. Which, if any, of the following situations listed below do you associate with a higher risk of contracting meningococcal meningitis than average? Base: Aware of Meningitis : Adolescents (15-17 years) Total (n=1149); France : (n=237); Greece : (n=217); Italy : (n=268); Portugal : (n=180); Spain : (n=217); Young Adults (18-24 years) Total (n=1081); France : (n=1988); Greece : (n=214); Italy : (n=250); Portugal : (n=192); Spain : (n=210); Parents of adolescents & young adults (15-24) Total (n=1491); France : (n=301); Greece : (n=289); Italy : (n=323); Portugal : (n=264); Spain : (n=301). A, Y, P = statistically significant difference between groups at 95% CI (A=adolescents, Y=young adults, P=parents)

■ % participants

Young adults are significantly more likely than parents and adolescents to **associate smoking with a higher than average risk** of contracting meningitis, across all markets











In Italy, fewer adolescents, young adults and parents associate smoking with increased risk of contracting meningitis than in other markets

Association of smoking with meningitis risk:



Across the three groups, **only a minority associate social activities with a heightened risk**

Association of social events with meningitis risk:

		 Adolescents (15-17)	 Young Adults (18-24)	 Parents of adolescents & young adults (15-24)	 Total level (all markets)
	Attending large public events	17%	19%	19%	
	Going to pubs/bars/clubs	15%	17%	17%	
	Go to youth/social clubs*	13%	13%	14%	
	Going to music concerts/gigs	11%	12%	12%	
	Attending sporting events as a spectator	8%	9%	8%	
	Participating in sporting activities	7%	8%	7%	

* PT 'Participate in group activities (e.g., scout camps, etc.)'

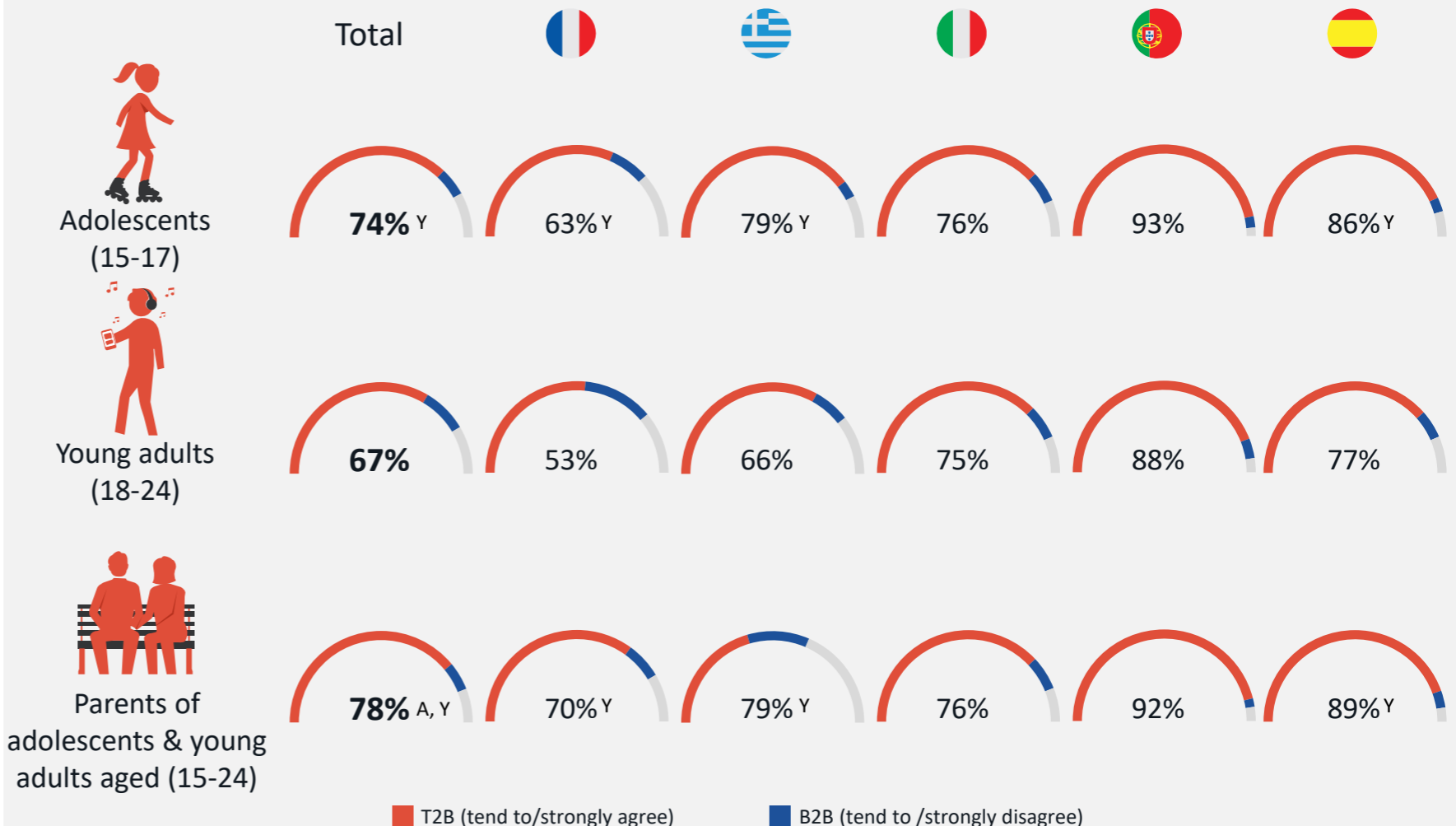
Q22. Which, if any, of the following situations listed below do you associate with a higher risk of contracting meningococcal meningitis than average? Base: Aware of Meningitis: Adolescents (15-17 years) Total (n=1149); Young Adults (18-24 years) Total (n=1081); Parents of adolescents & young adults (15-24) Total (n=1491)

Meningococcal meningitis vaccination

A significantly greater proportion of adolescents and parents state that they believe in having/giving all recommended vaccines than young adults

Across all three groups, belief in vaccination is lowest in France, with highest intent to vaccinate coming through in Portugal

Belief in having/giving children all recommended vaccinations:





Total level (all markets)

Overall one third of young adults and around a quarter of adolescents and parents **do not believe in having/giving all recommended vaccinations**

Agreement with statements:



Adolescents
(15-17)



Young Adults
(18-24)

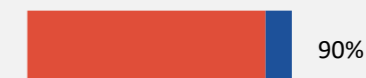


Parents of adolescents
& young adults (15-24)

I give my children advice to stay healthy

NA

NA



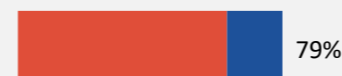
I still feel responsible for the health of my children

NA

NA



I feel responsible for my health



NA

I believe in having/giving my children all recommended vaccinations



Y



A, Y

I rely on my parents for advice on most health topics



Y



NA

T2B (tend to/strongly agree)

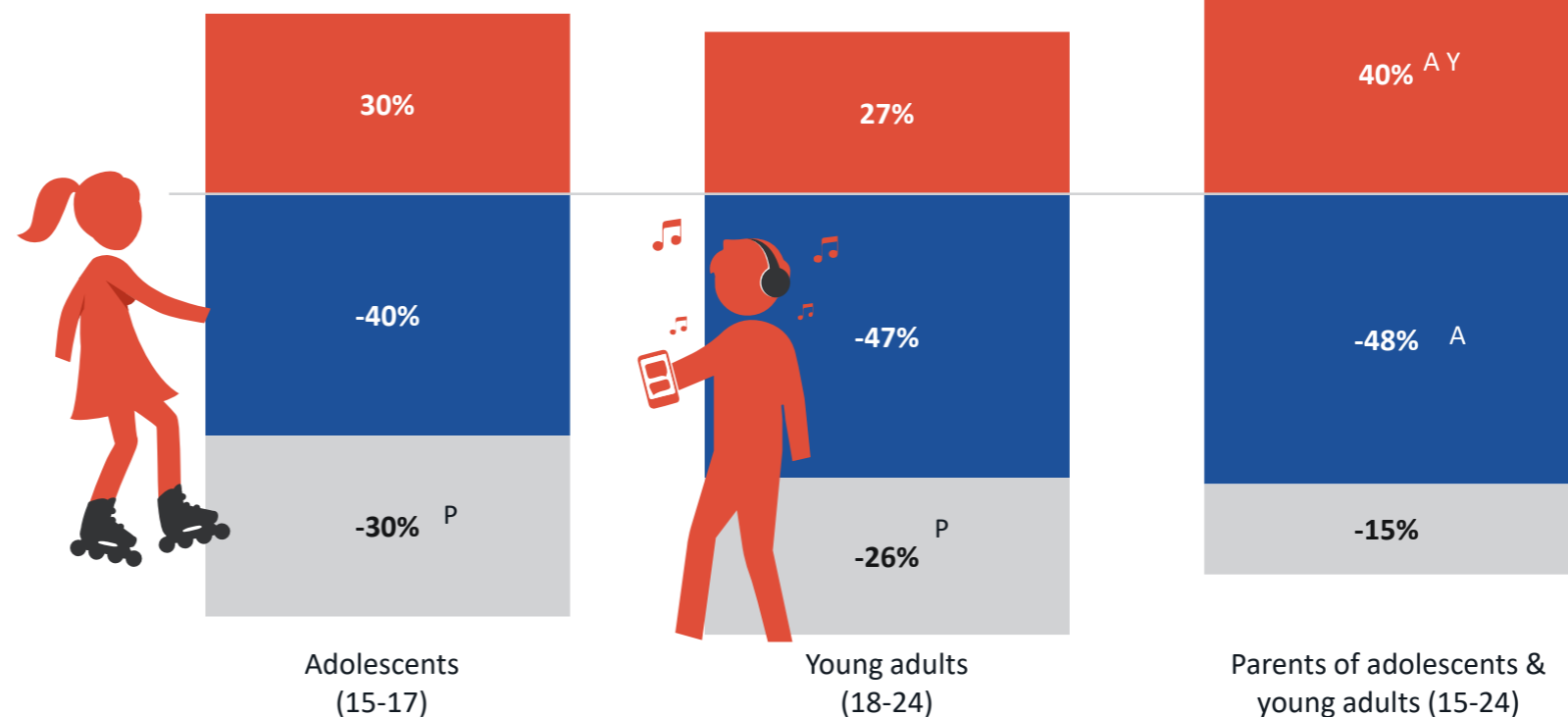
B2B (tend to/strongly disagree)

Only a minority of those aware of meningitis have considered being vaccinated against the disease

% of aware of meningitis that have considered being vaccinated

(GR, IT, ES: amongst those not vaccinated; FR, PT: amongst those aware of meningococcal meningitis)

Yes No Don't Know



Total level (all markets)