

YouthView

Global report

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

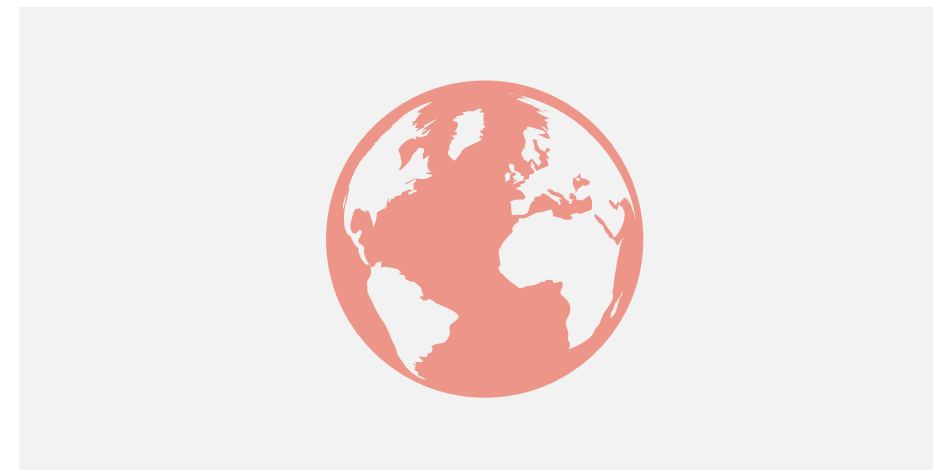
Research objectives

- 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-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

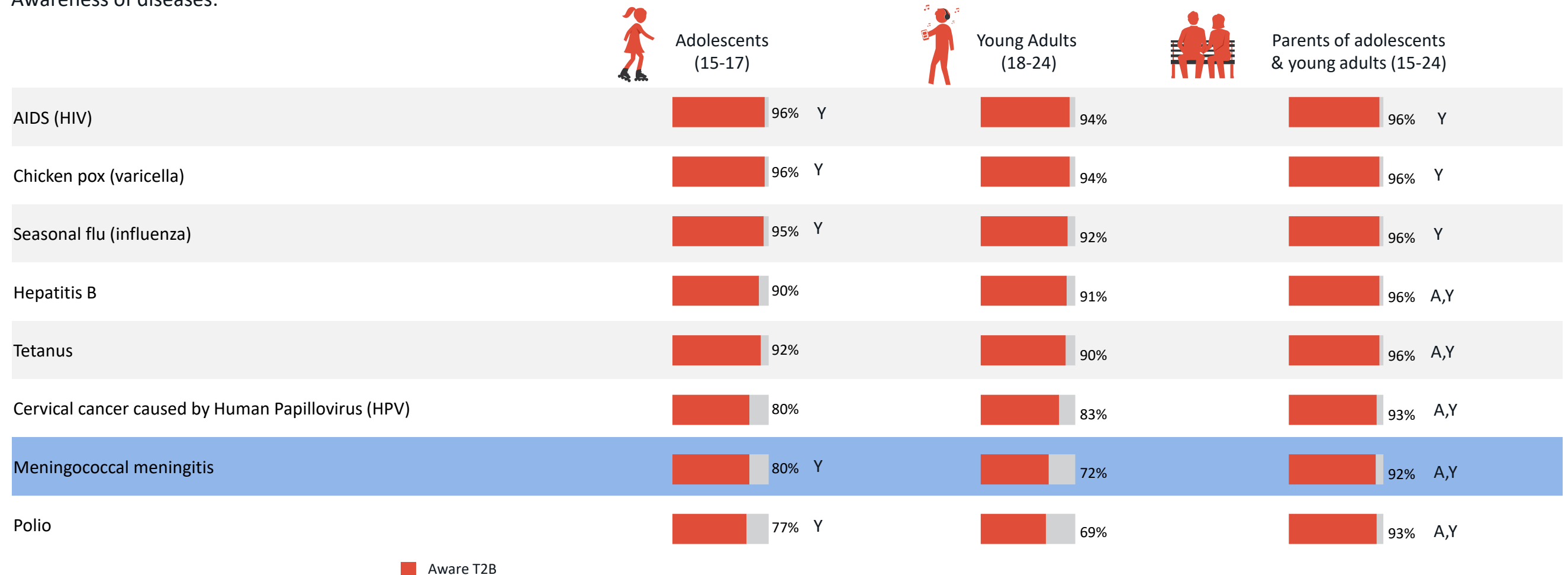
Awareness and perceptions of meningococcal meningitis



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:

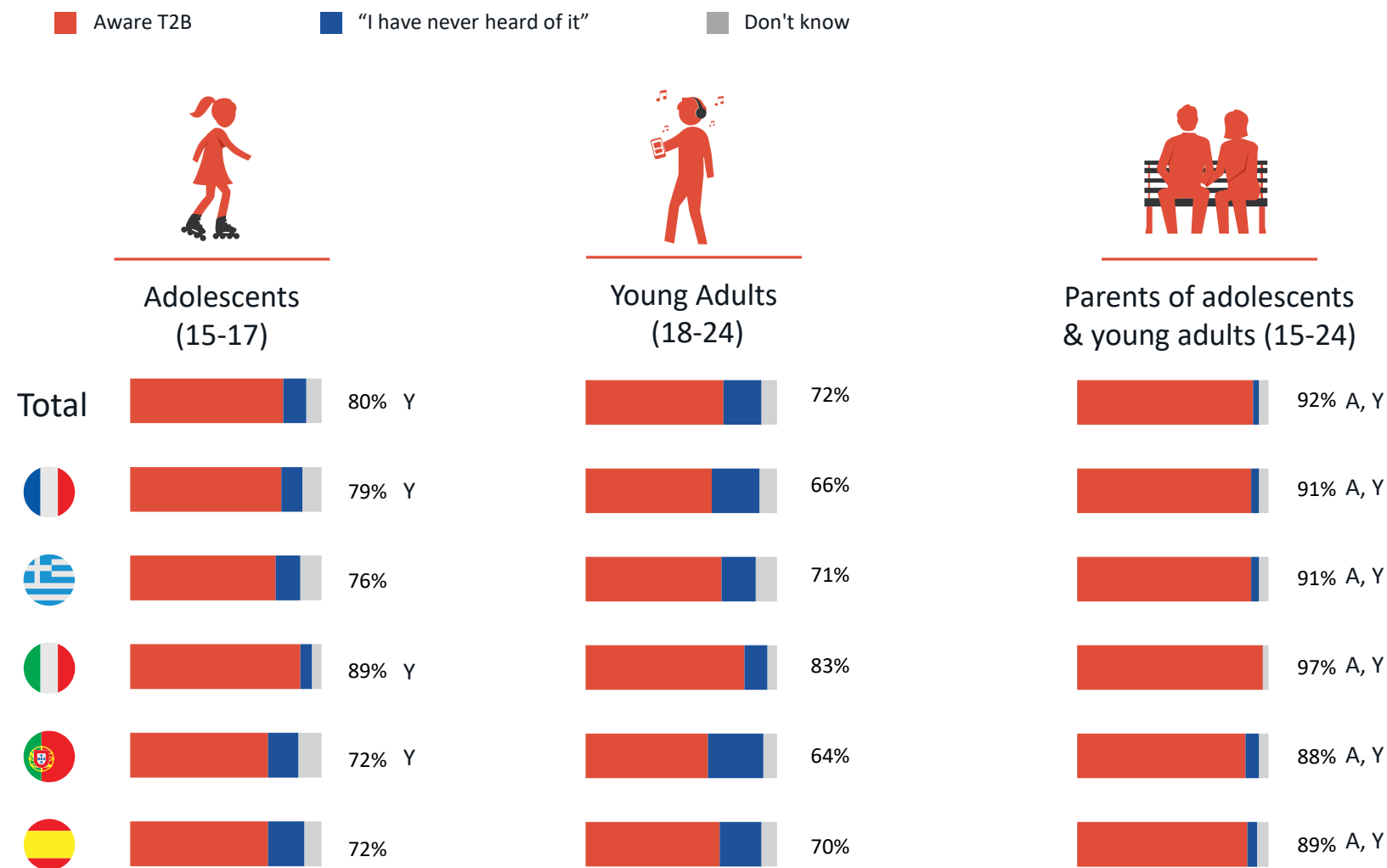


Q15. Which of the options below best describes your awareness of the following diseases: "I have never heard of it", "I have heard of it but don't know what it is", "I know what it is", "Don't know", "Prefer not to answer" Base: all respondents; Adolescents (15-17 years) (n=1438); Young Adults (18-24 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:



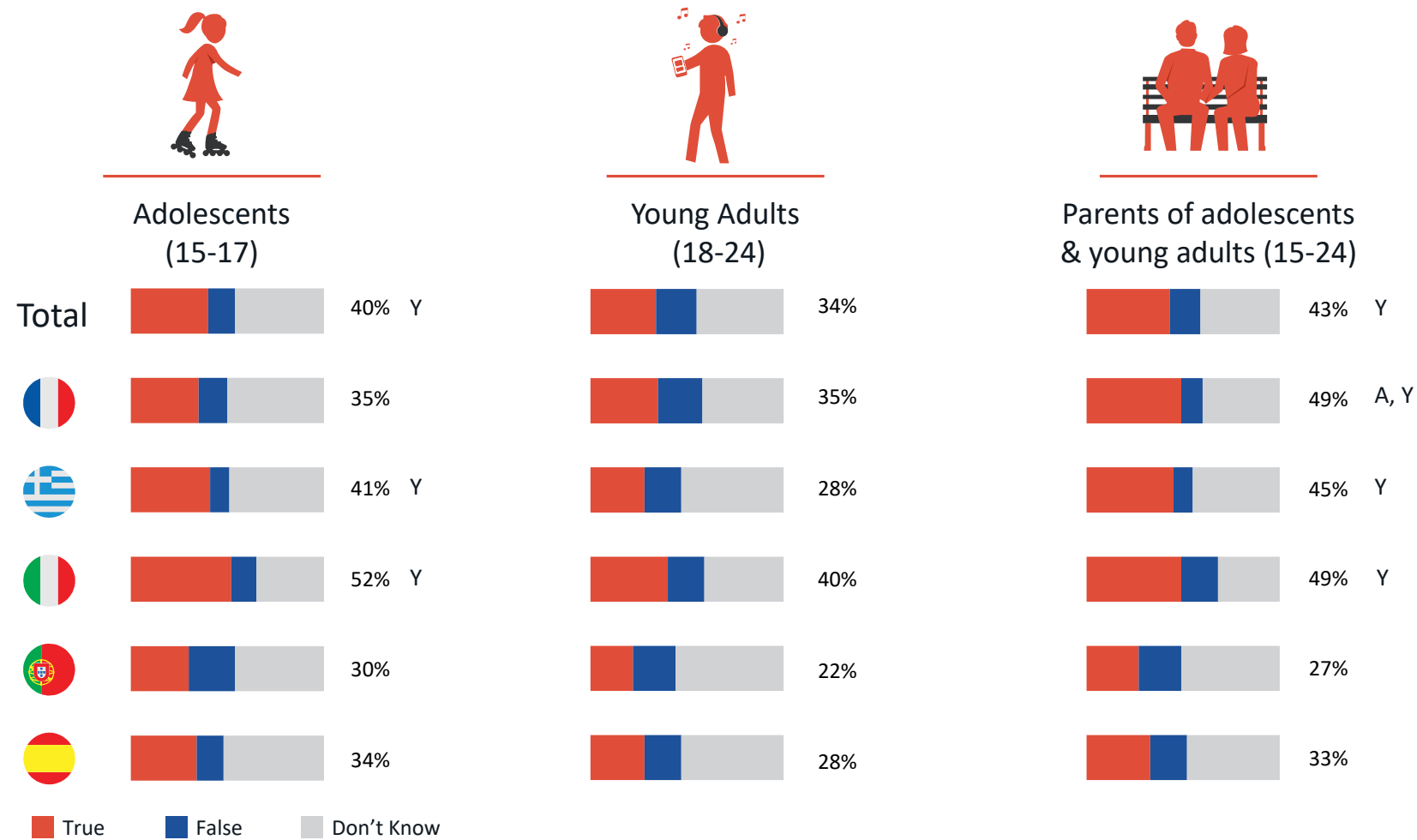
Looking at perceptions of risk, across groups a **majority don't agree or don't know whether adolescents or young adults are at greater risk** of contracting meningitis

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:



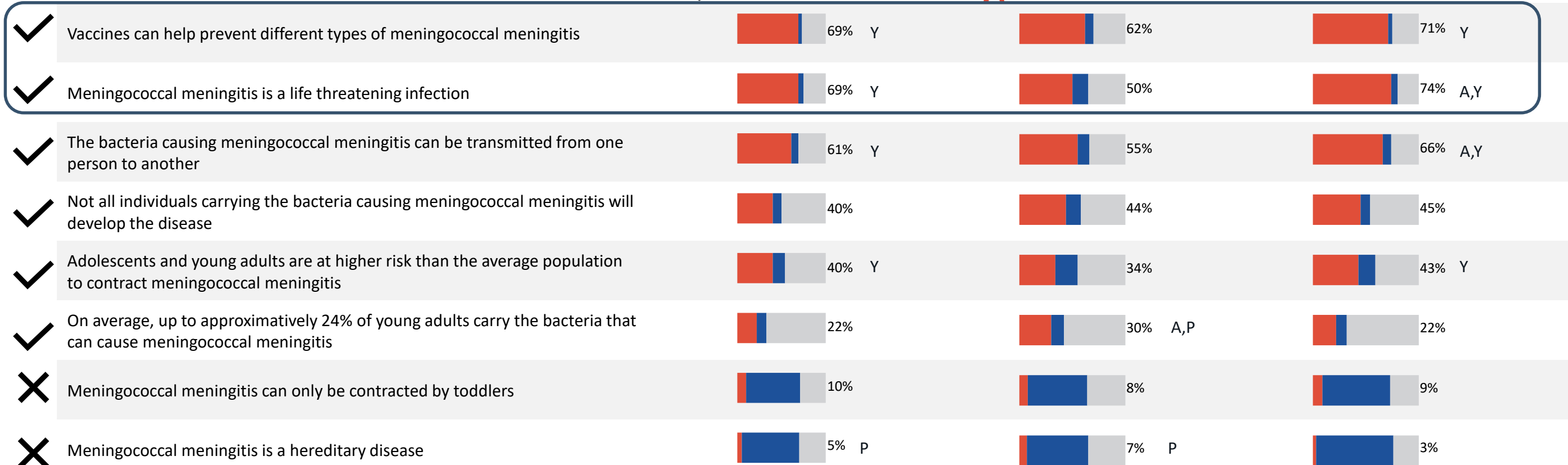
Adolescents
(15-17)



Young Adults
(18-24)



Parents of adolescents
& young adults (15-24)



✓ True statements

✗ False statements

True

False

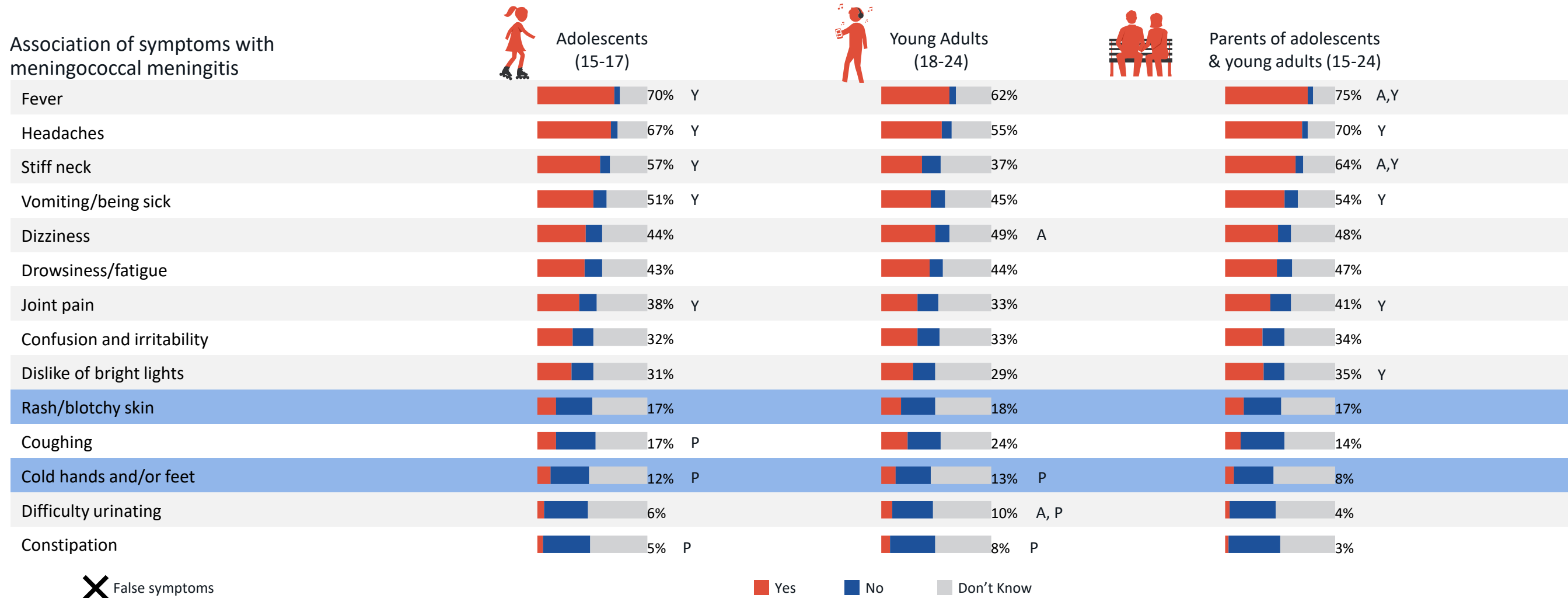
Don't Know

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



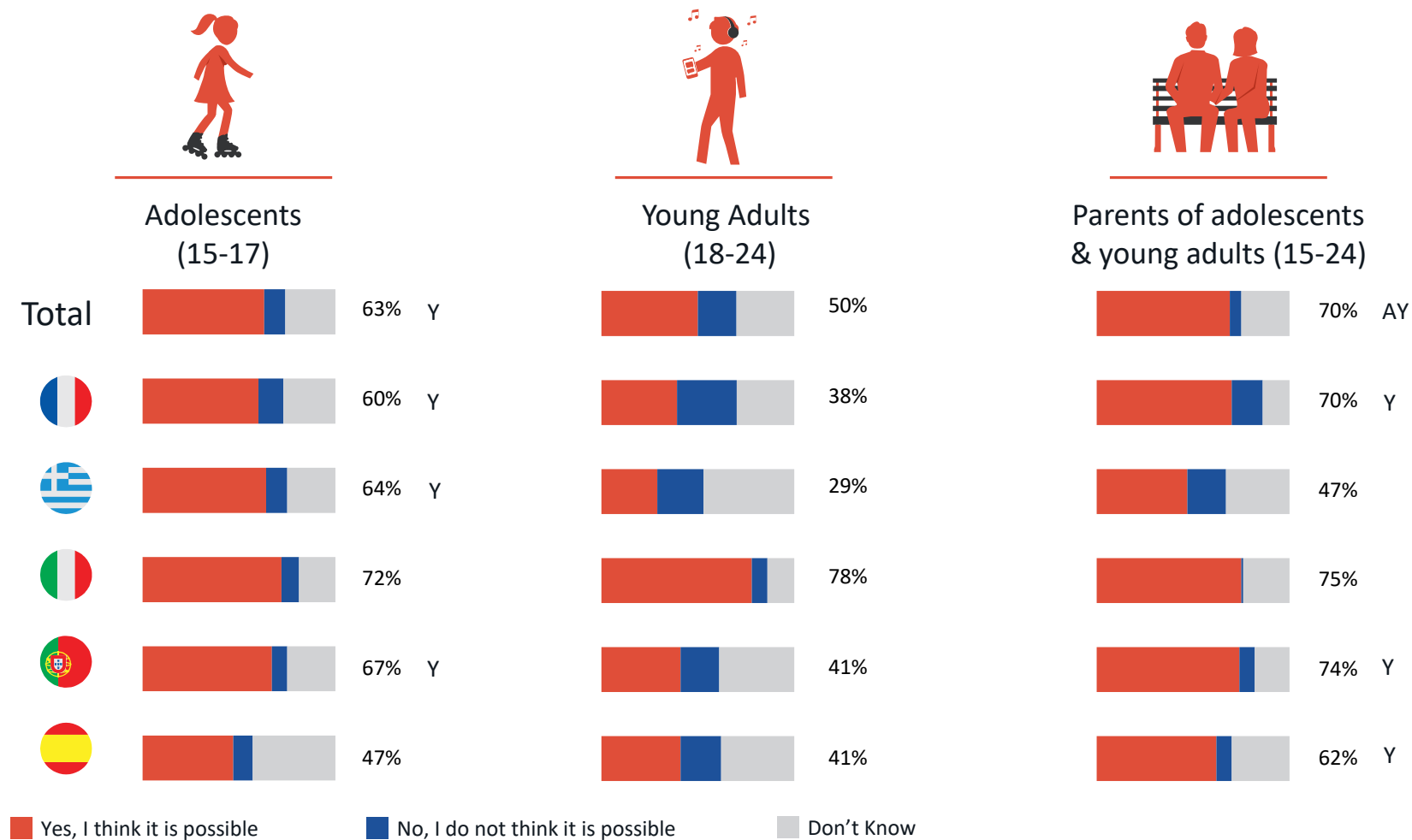
Across all markets, except Italy, **awareness of the meningococcal meningitis vaccine is lower amongst young adults** than parents and adolescents

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:

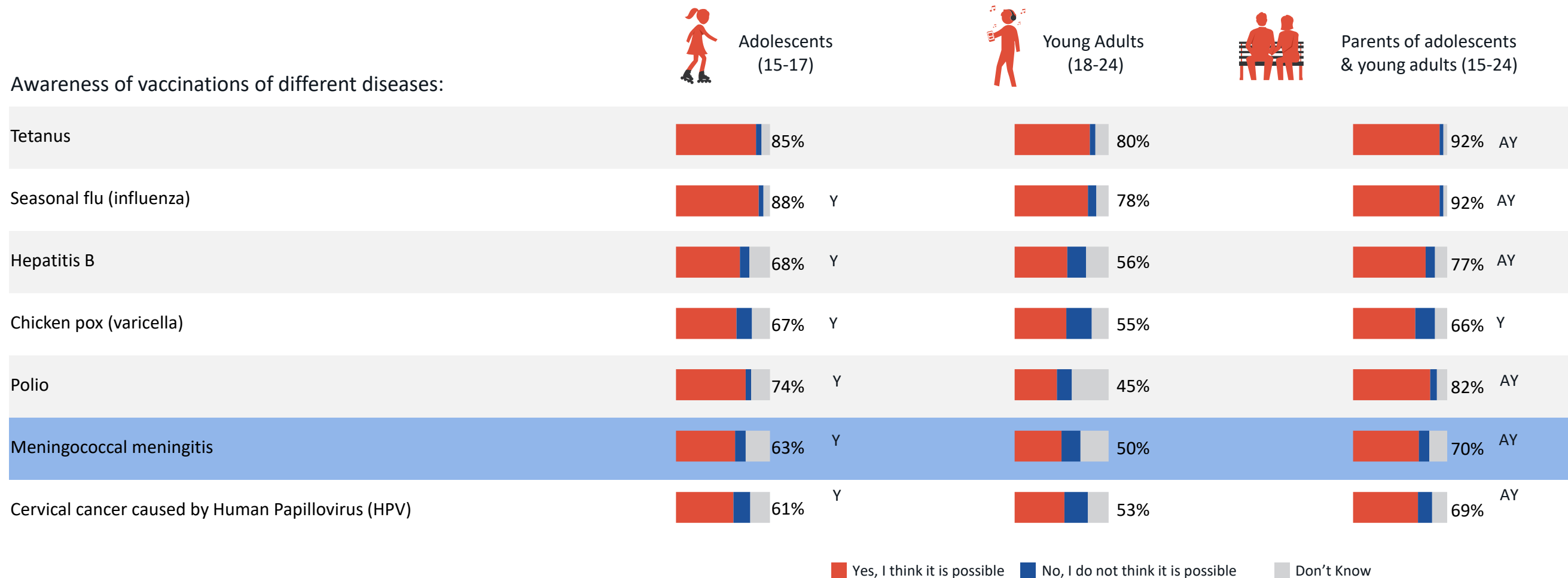
(GR, IT, ES: amongst those not vaccinated; FR, PT: amongst those aware of meningococcal meningitis)





Total level (all markets)

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



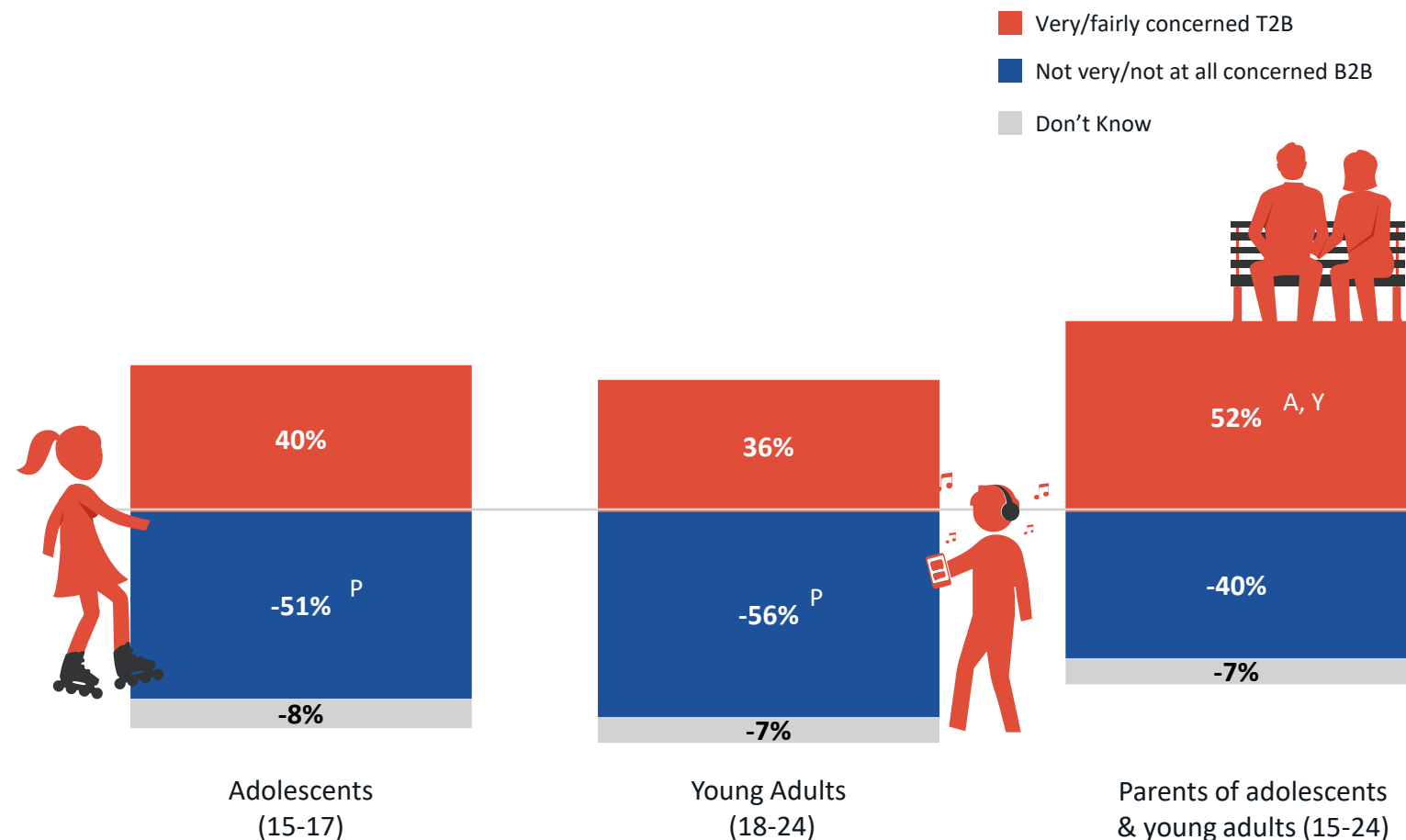


Total level (all markets)

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:



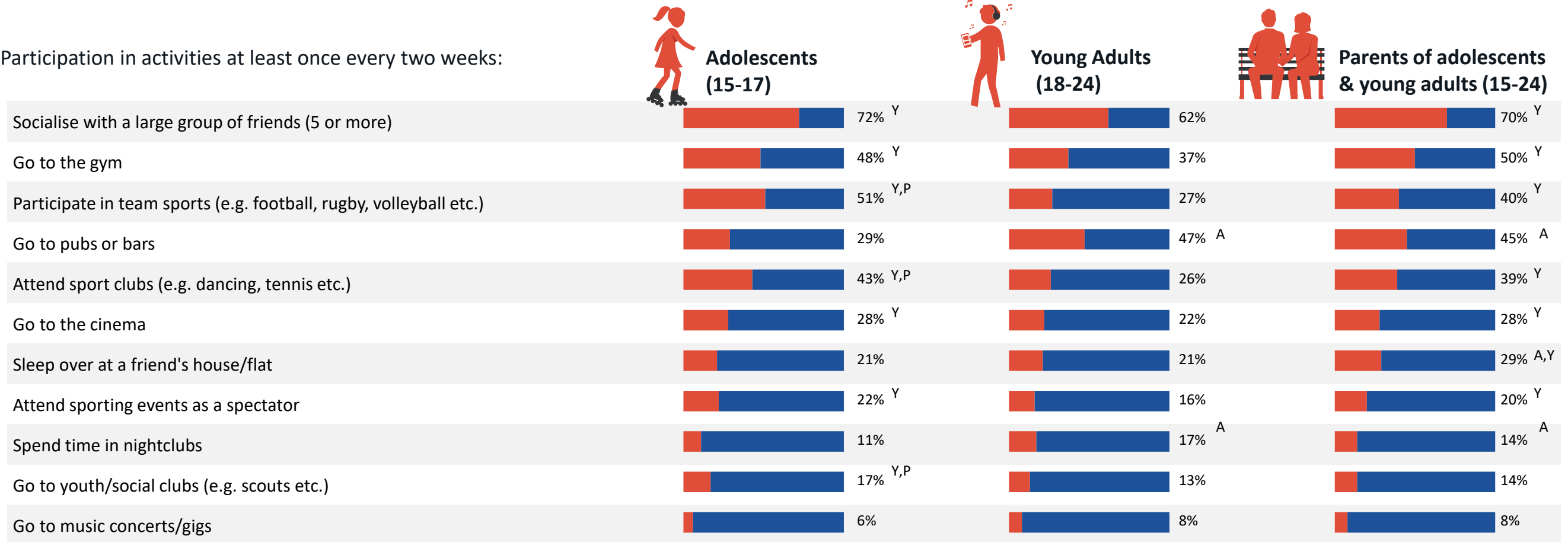
Behaviours related to meningococcal meningitis



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%

Young Adults (18-24)

68%^{A, P}

Parents of adolescents & young adults (15-24)

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%



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 level (all markets)

Total

54%

56%^P

51%



53%

59%

55%



29%

34%

41%^A



56%

57%

57%



49%^P

48%^P

38%



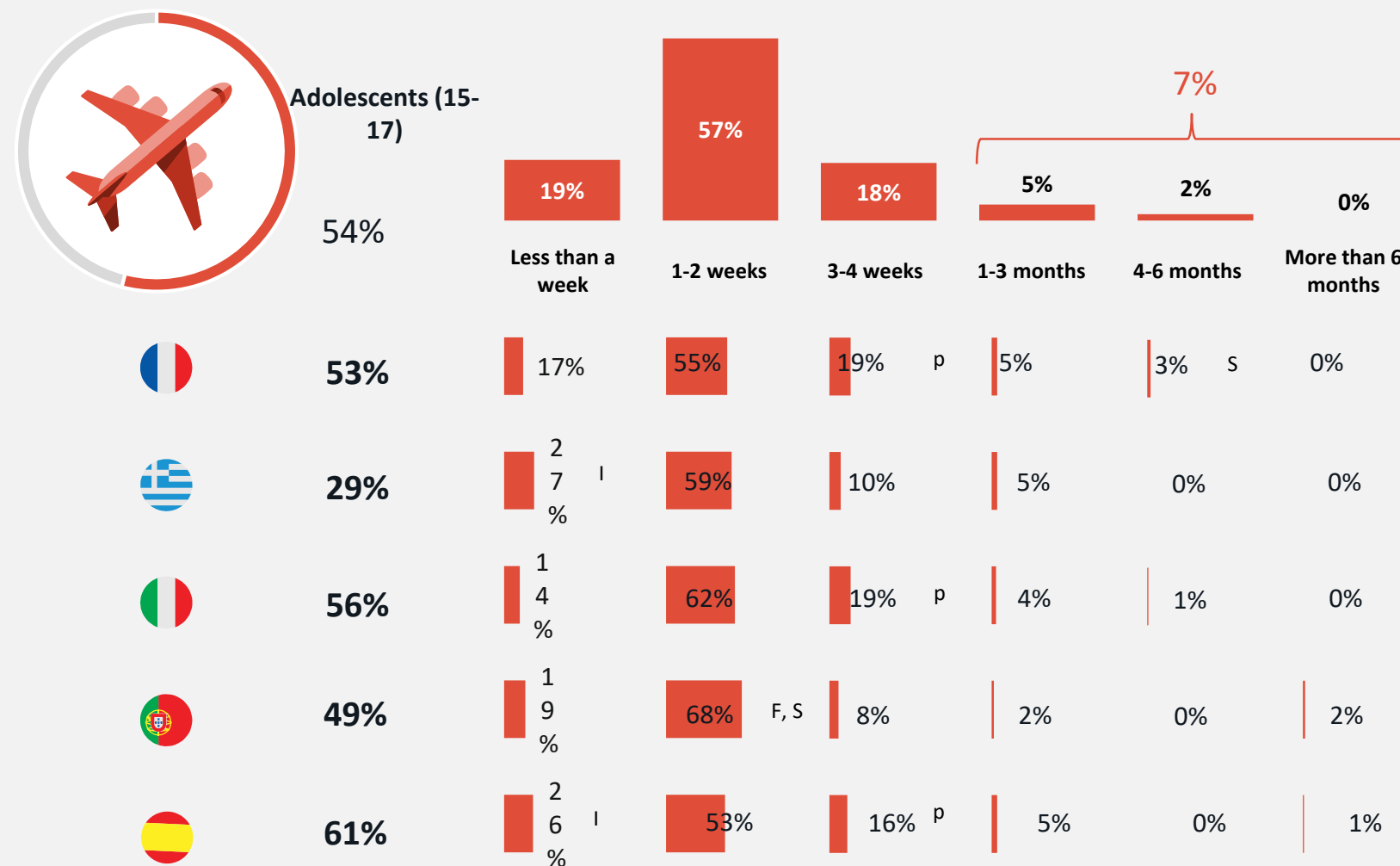
61%^P

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)**

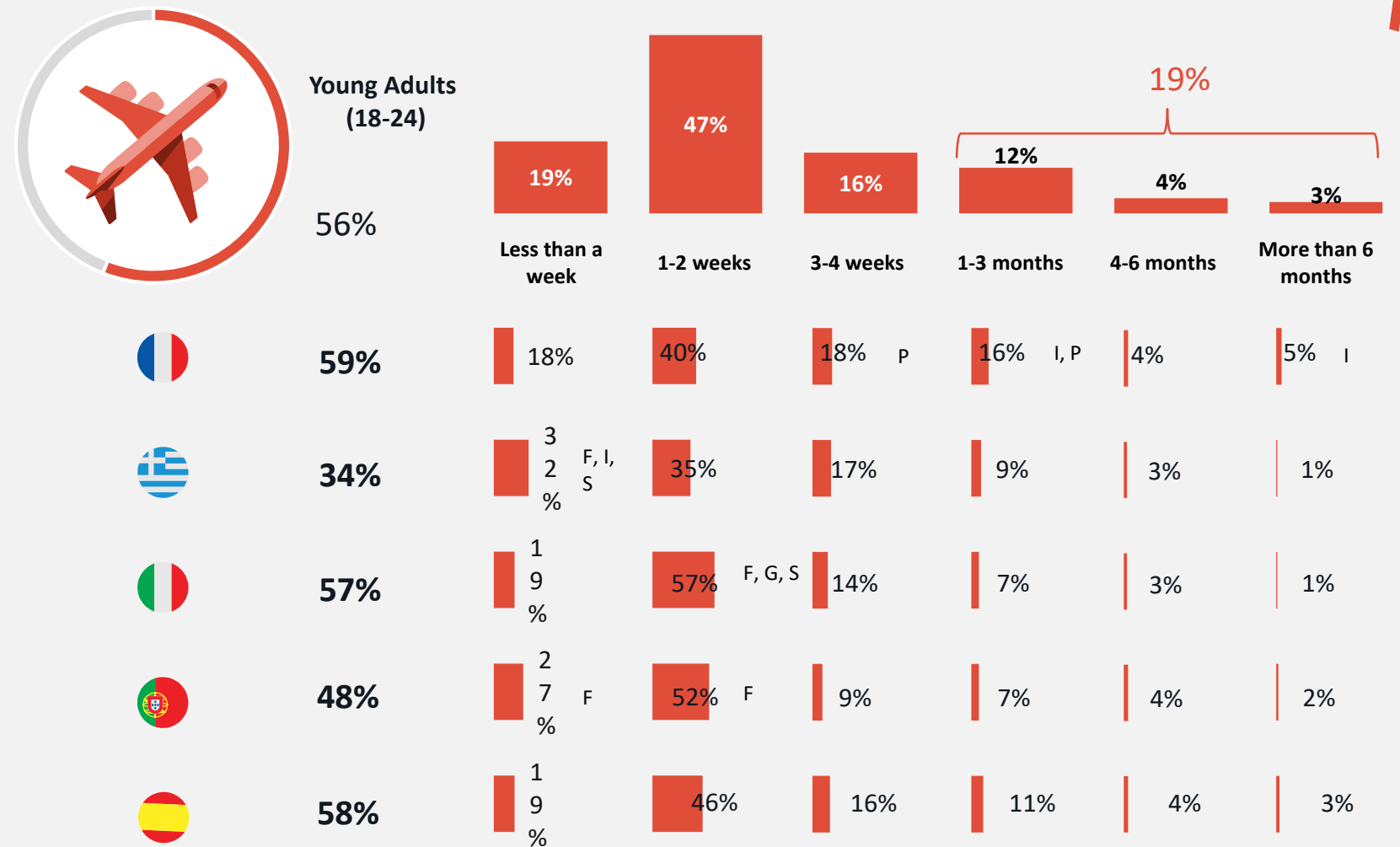
% who have travelled abroad in past 12 months – duration of trip:



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:



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

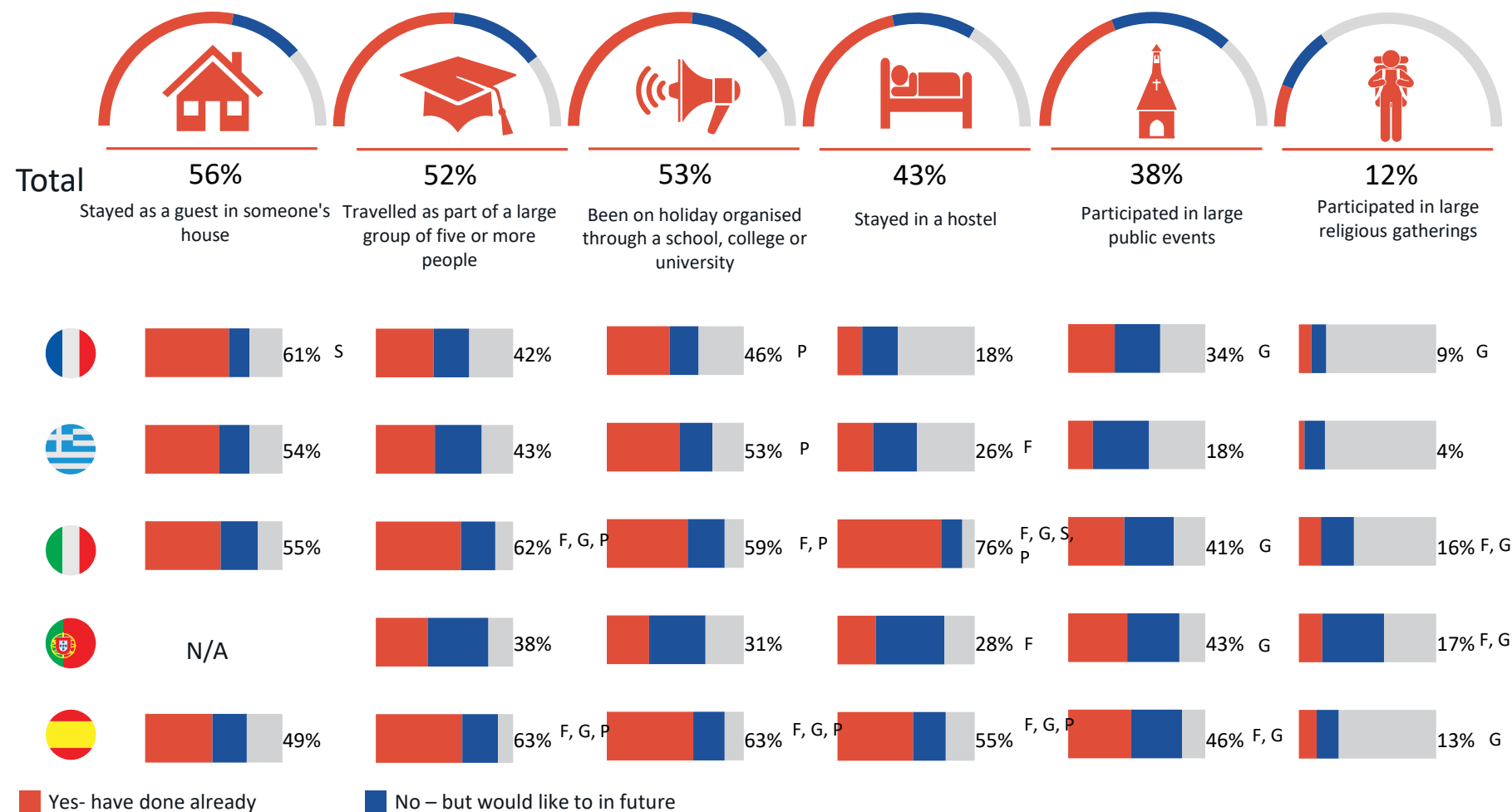
In addition, a similar proportion have travelled as part of a **large group** or have been abroad as part of a **school trip**

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)

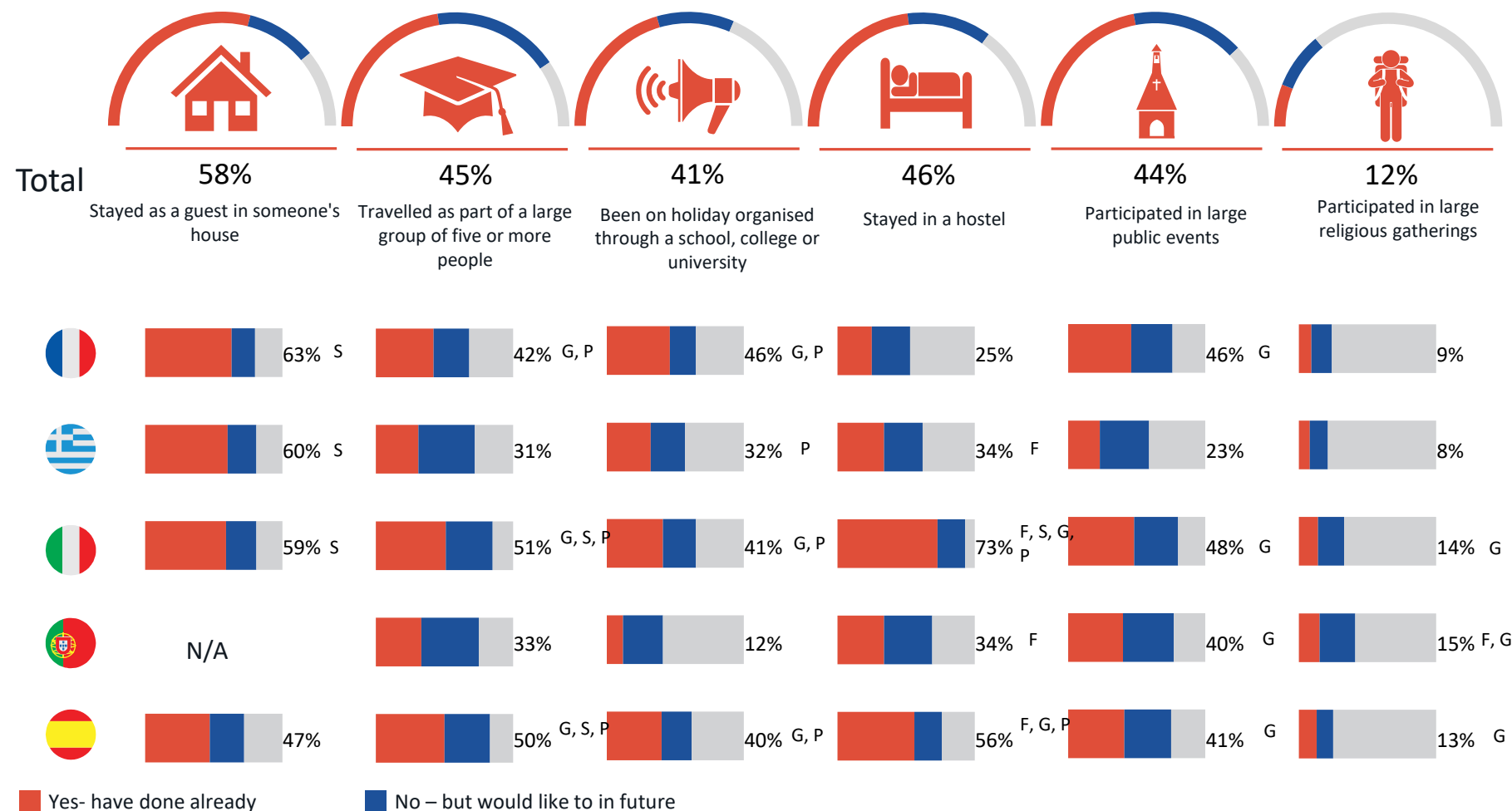


Similarly for young adults, almost 6 out of 10 (58%) have stayed as a **guest in someone's house** whilst on holiday in the last 12 months

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

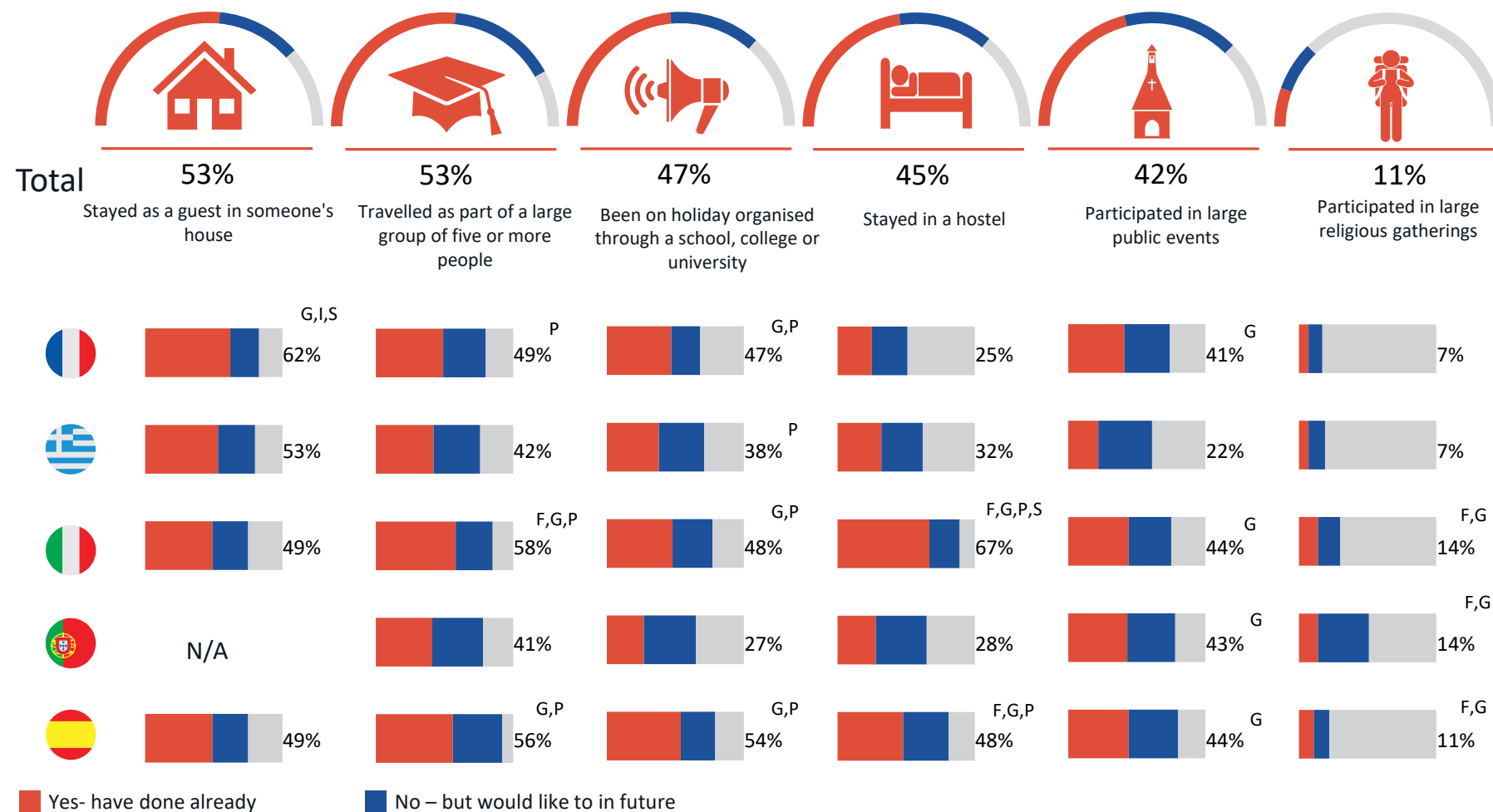
Young Adults (18-24 years)



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)

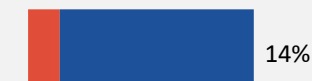
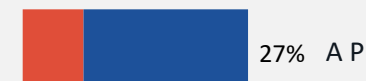
Share the same piece of food (e.g. eating the same apple, sandwich, ice cream)



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

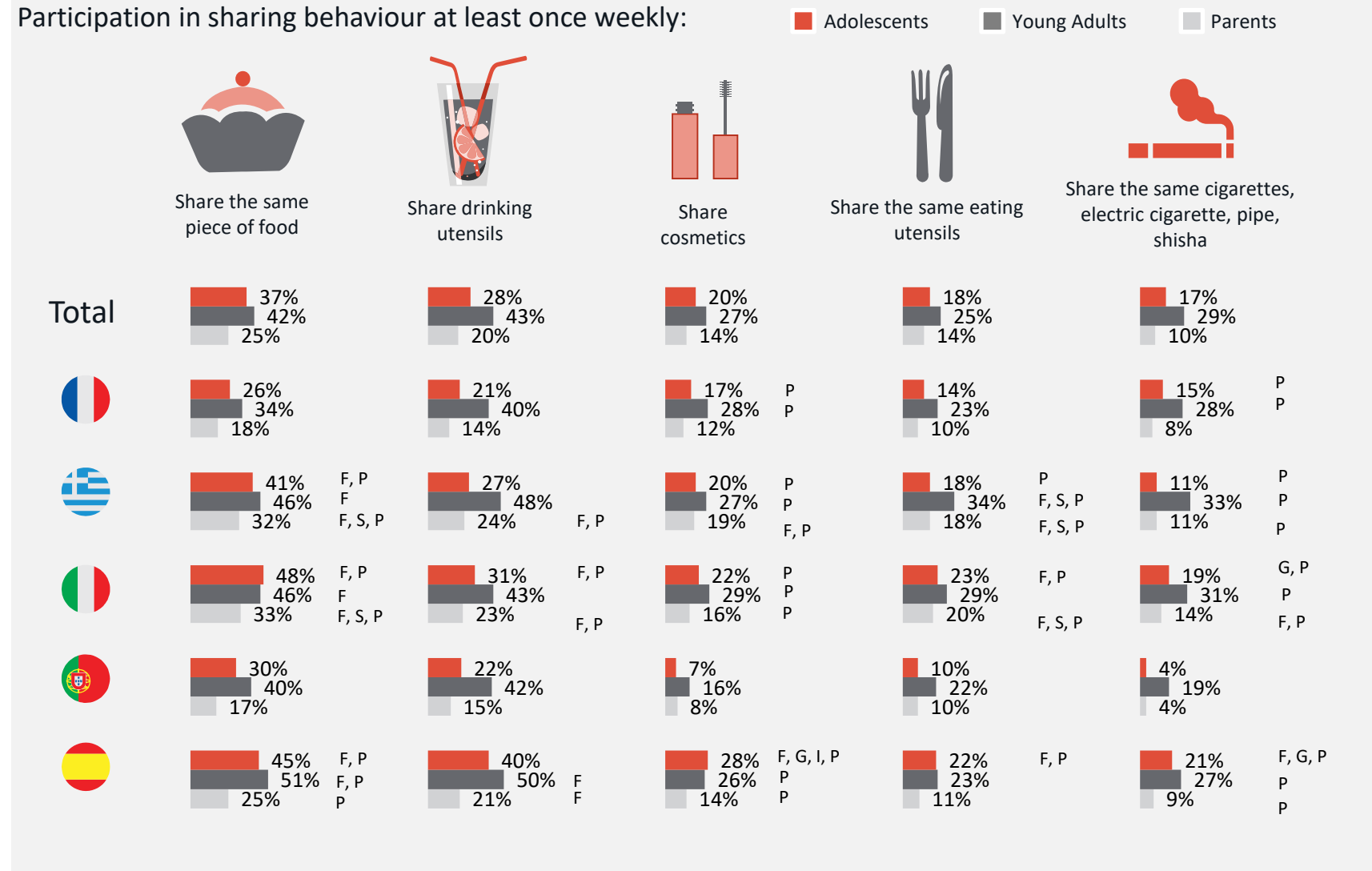
Q12. When spending time with friends, how often, if at all, do [ADOLESCENTS & YOUNG ADULTS: you PARENTS: your child/children, as far as you are aware,... Base: all respondents: Adolescents (15-17) (n=1438); Young Adults (18-24) (n=1501); Parents of adolescents & young adults (15-24) (n=1621) A, Y, P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

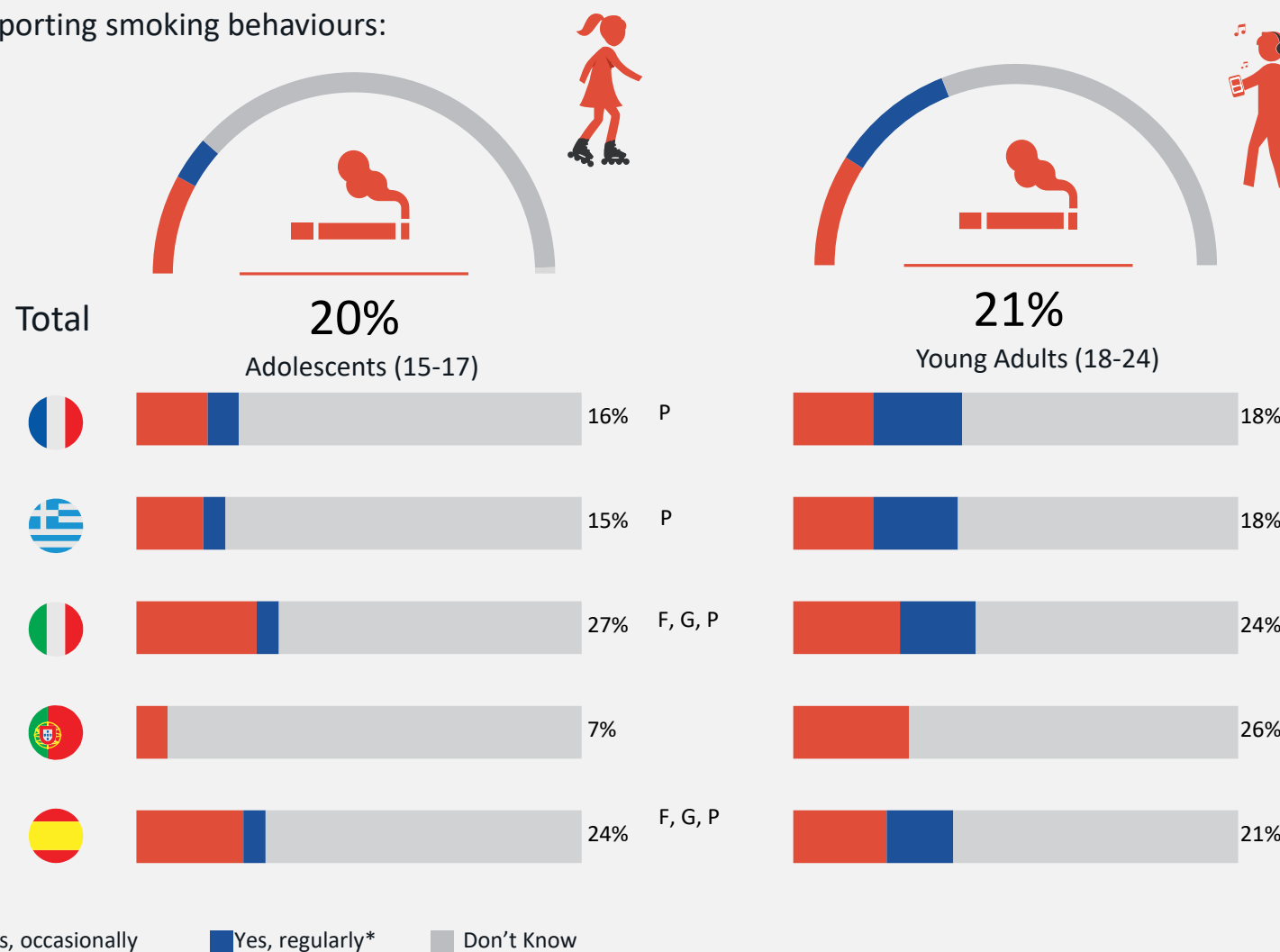


One fifth of both adolescents and young adults claim to **smoke at least occasionally**

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:



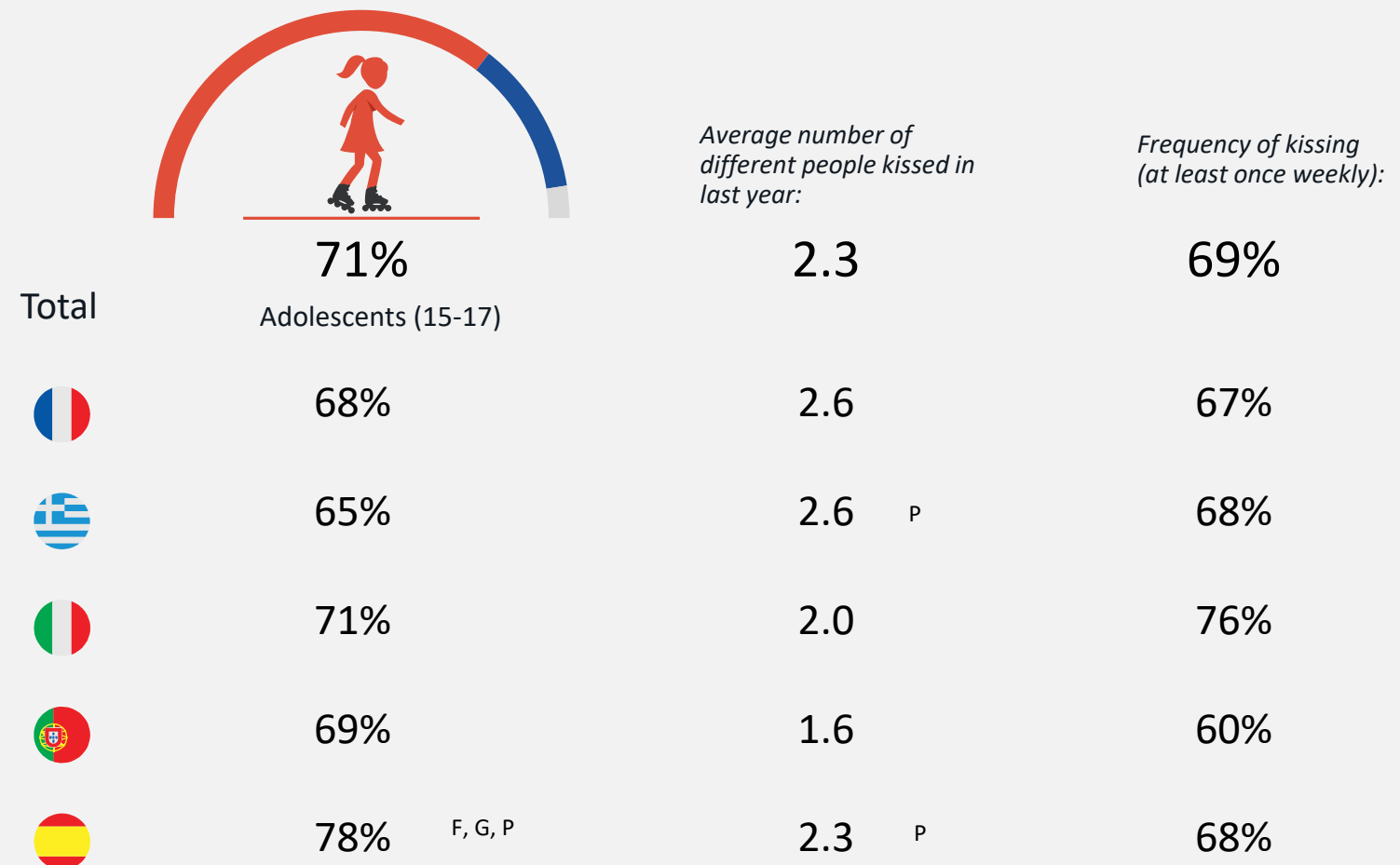
*Not an answer option in Portugal

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

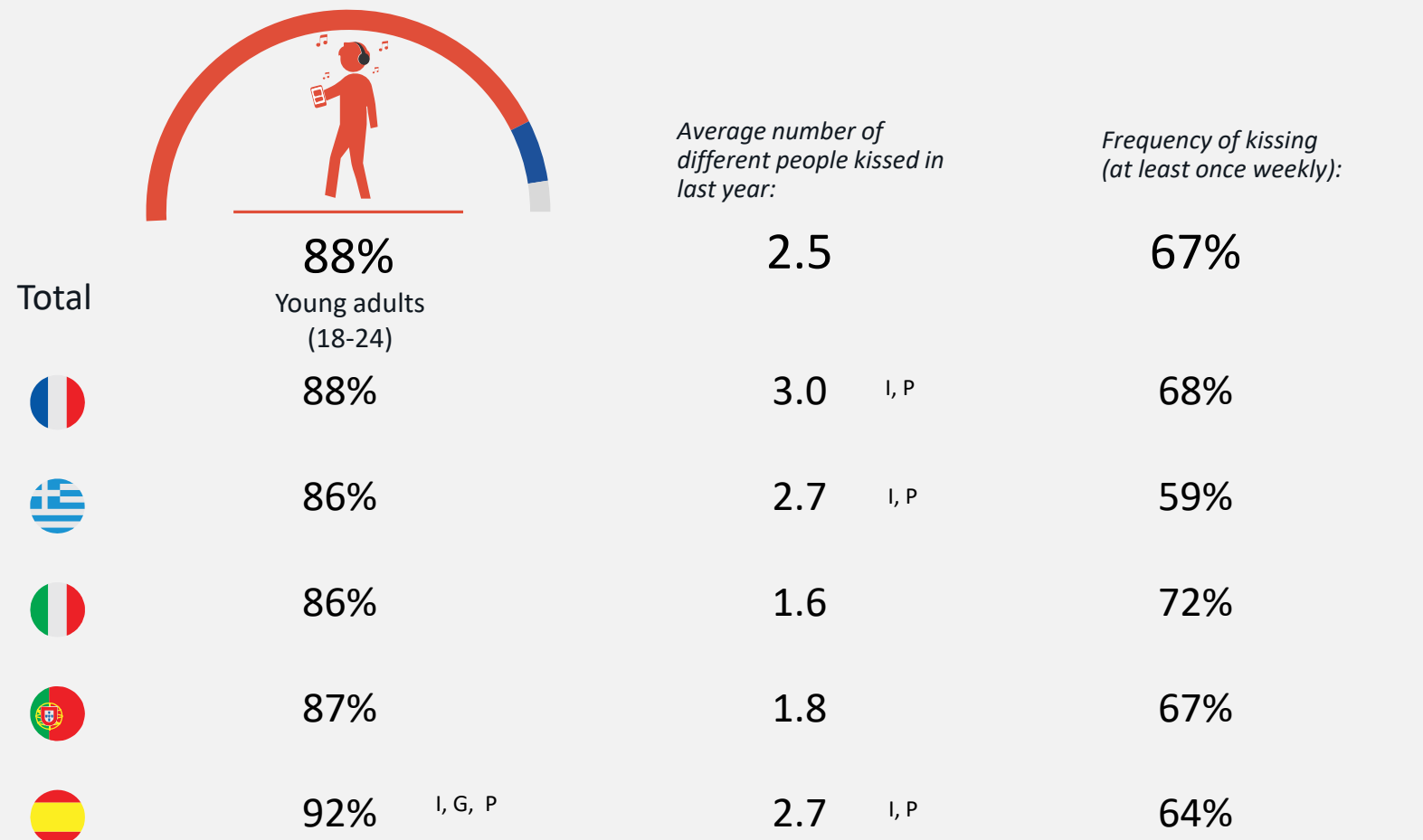


Almost all young adults (88%) report having intimately kissed someone

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

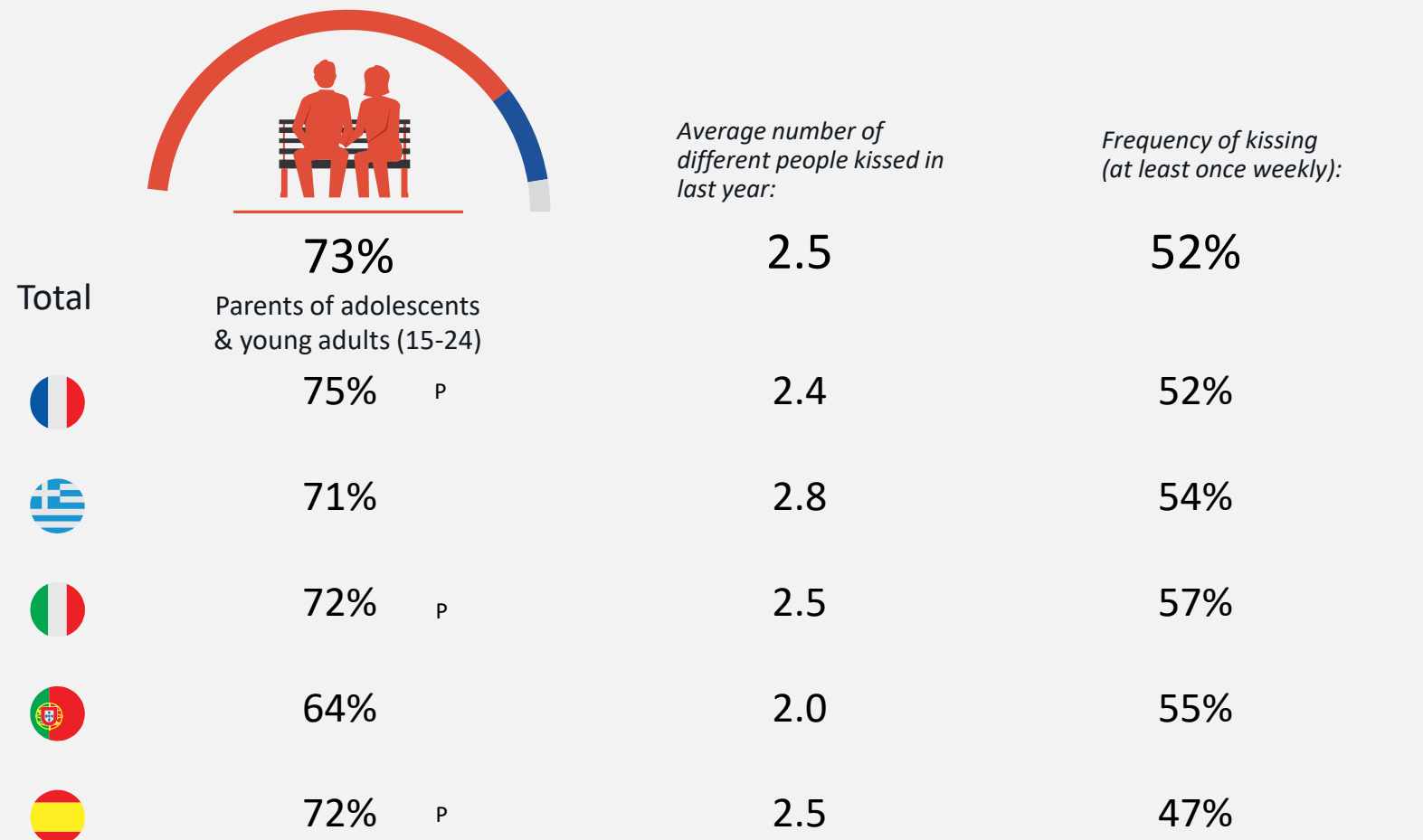


Almost three-quarters of parents (73%) believe that their children have intimately kissed someone

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



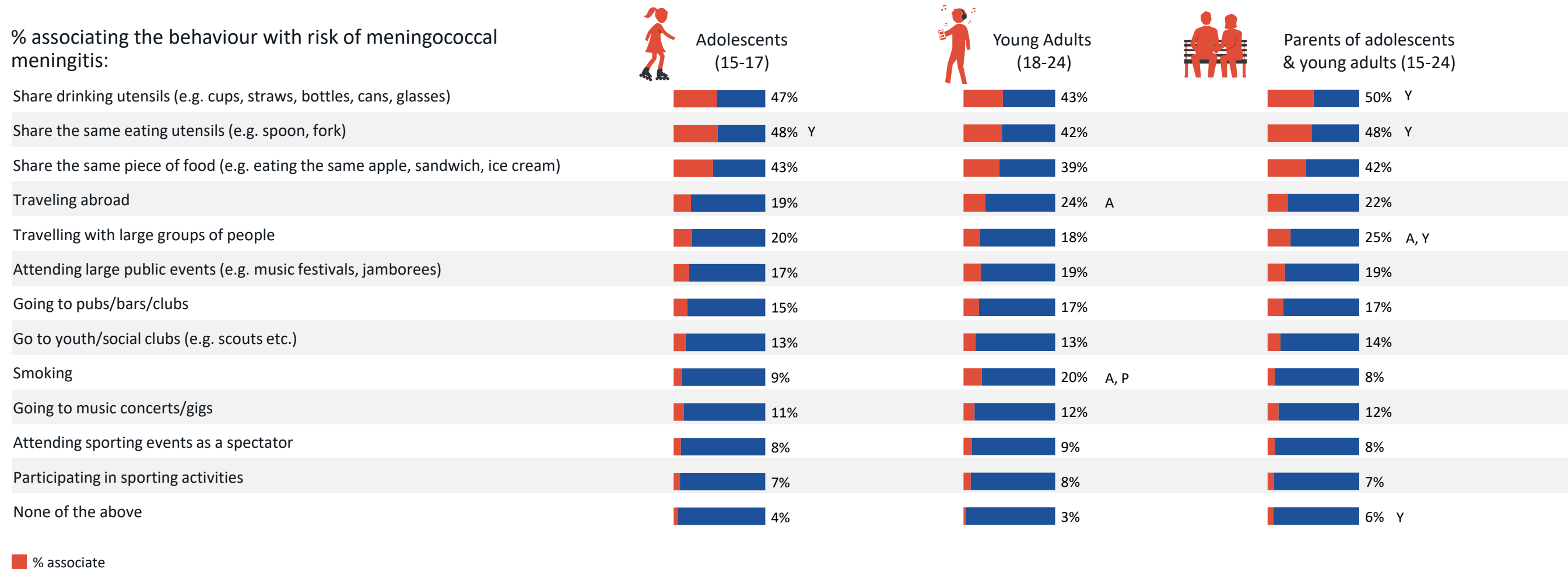
**Perceived level of risk for
behaviours**



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:



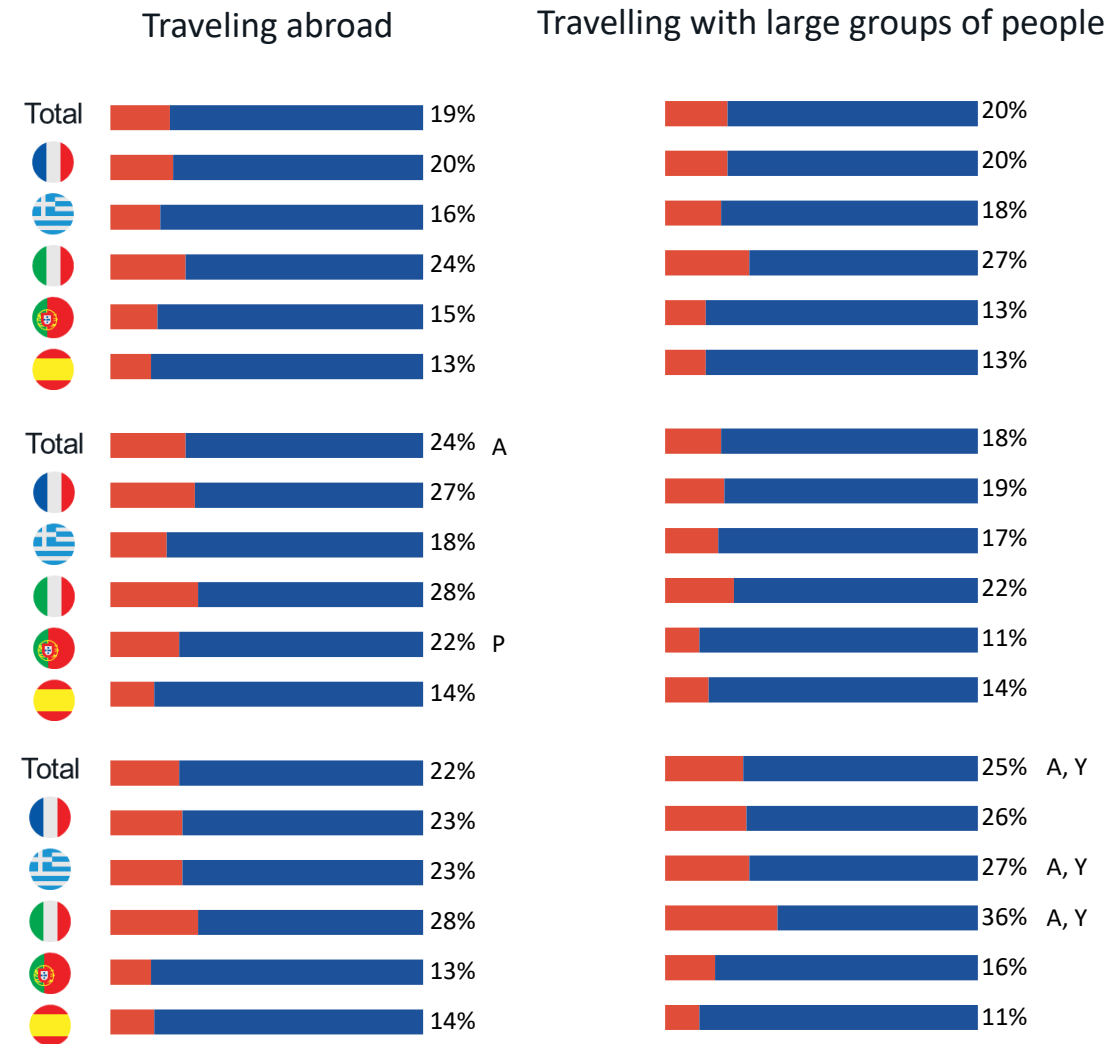
Q22. Which, if any, of the following situations listed below do you associate with a higher risk of contracting meningococcal meningitis than average? Base: Aware of Meningitis : Adolescents (15-17 years) (n=1149); Young Adults (18-24 years) (n=1081); Parents of adolescents & young adults (15-24) (n=1491)

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:

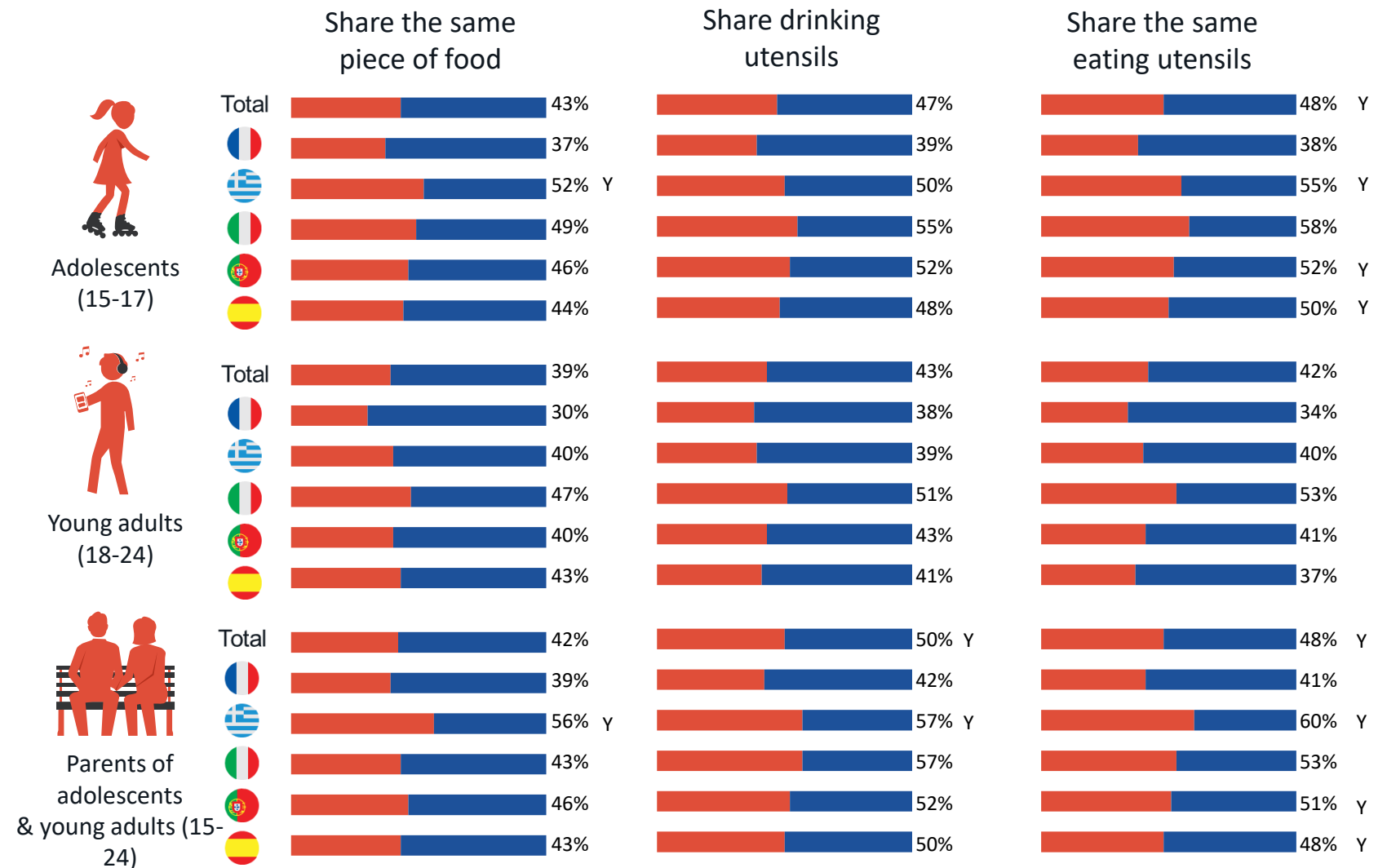


■ % participants

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:



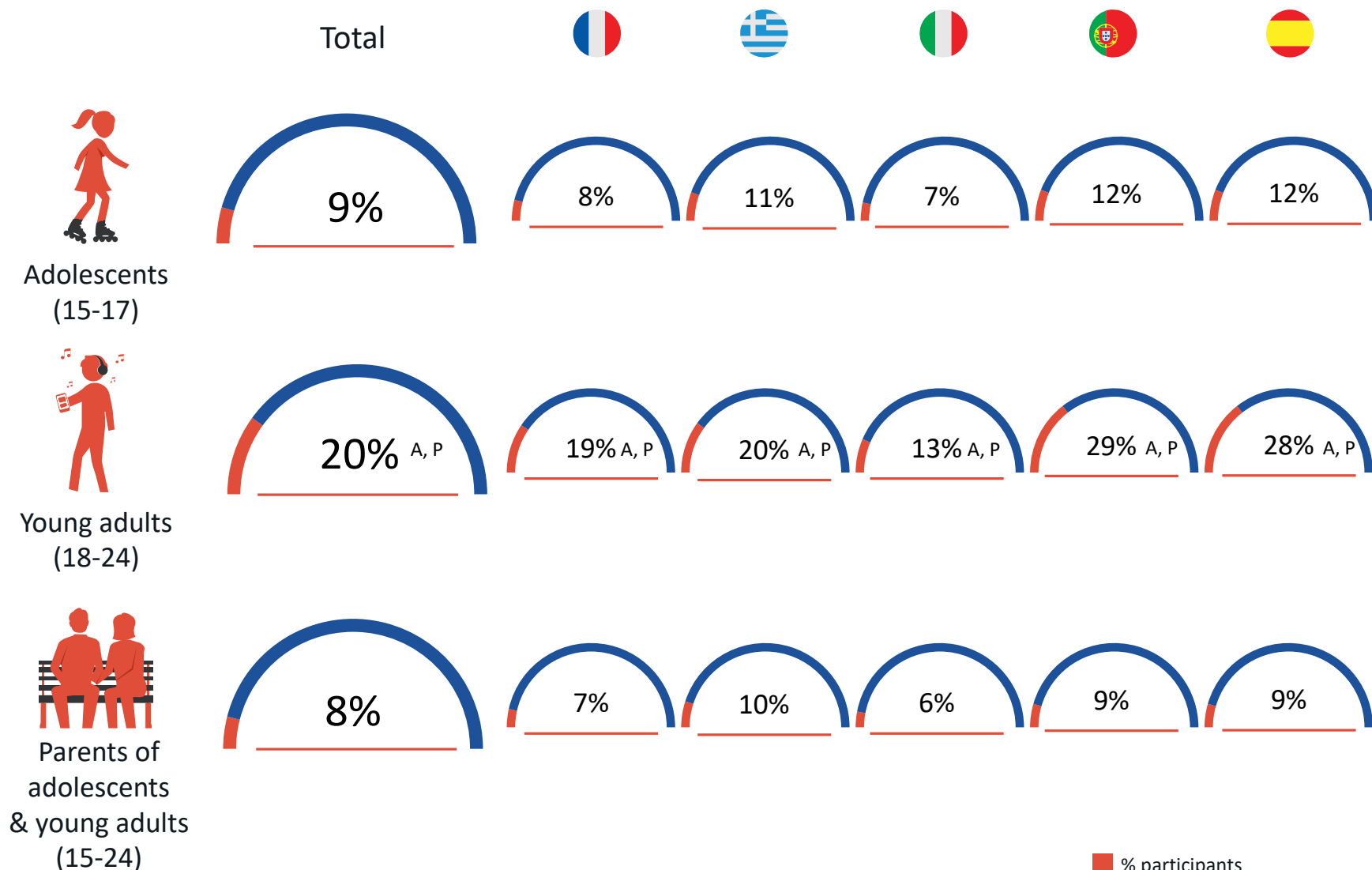
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% participants

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.)'

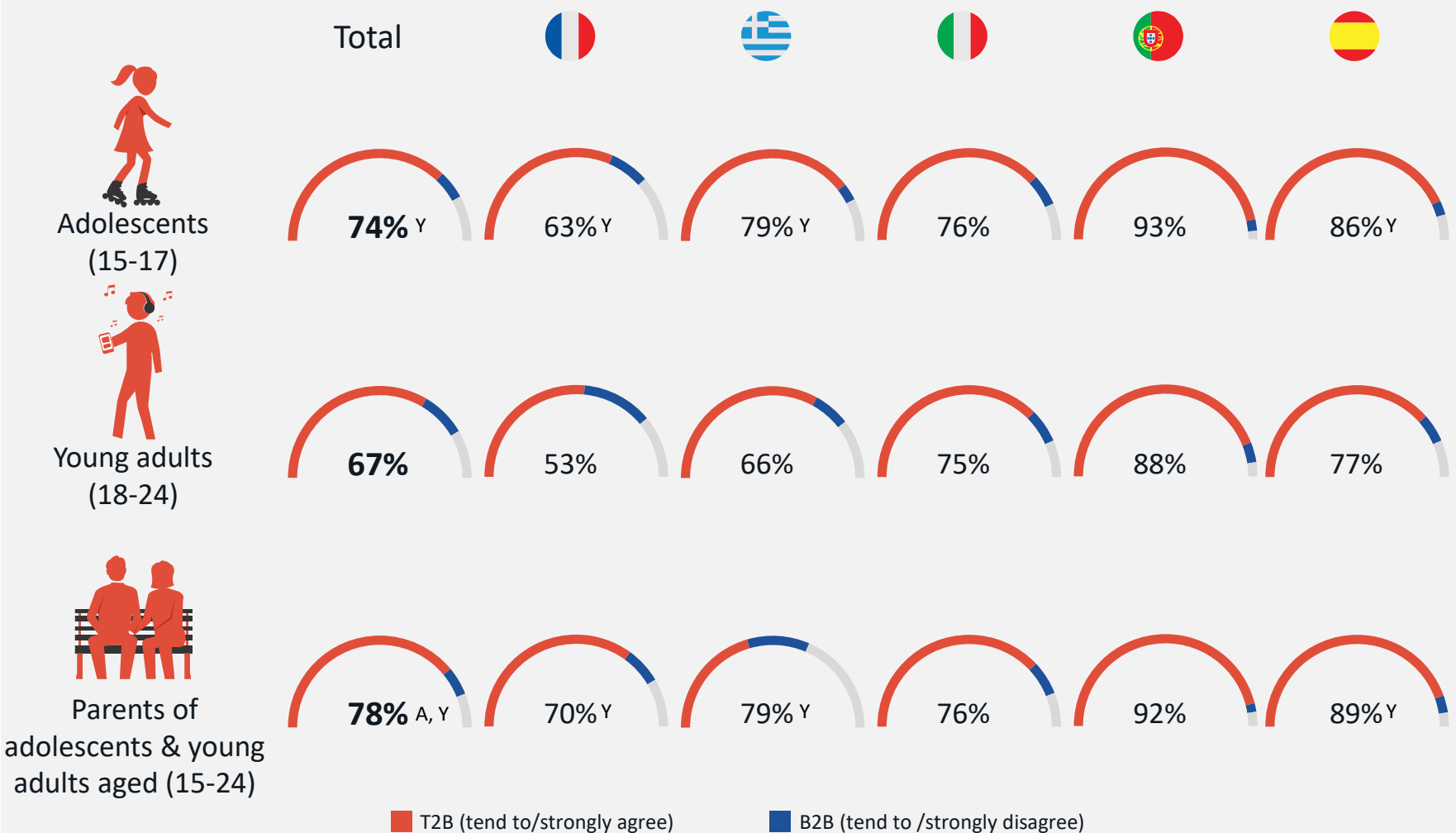
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Meningococcal meningitis vaccination

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)

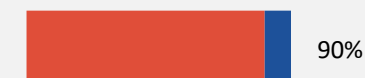


Parents of adolescents
& young adults (15-24)

I give my children advice to stay healthy

NA

NA



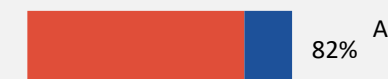
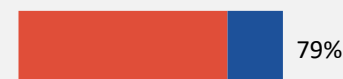
I still feel responsible for the health of my children

NA

NA



I feel responsible for my health



NA

I believe in having/giving my children all recommended vaccinations



I rely on my parents for advice on most health topics



NA

T2B (tend to/strongly agree)

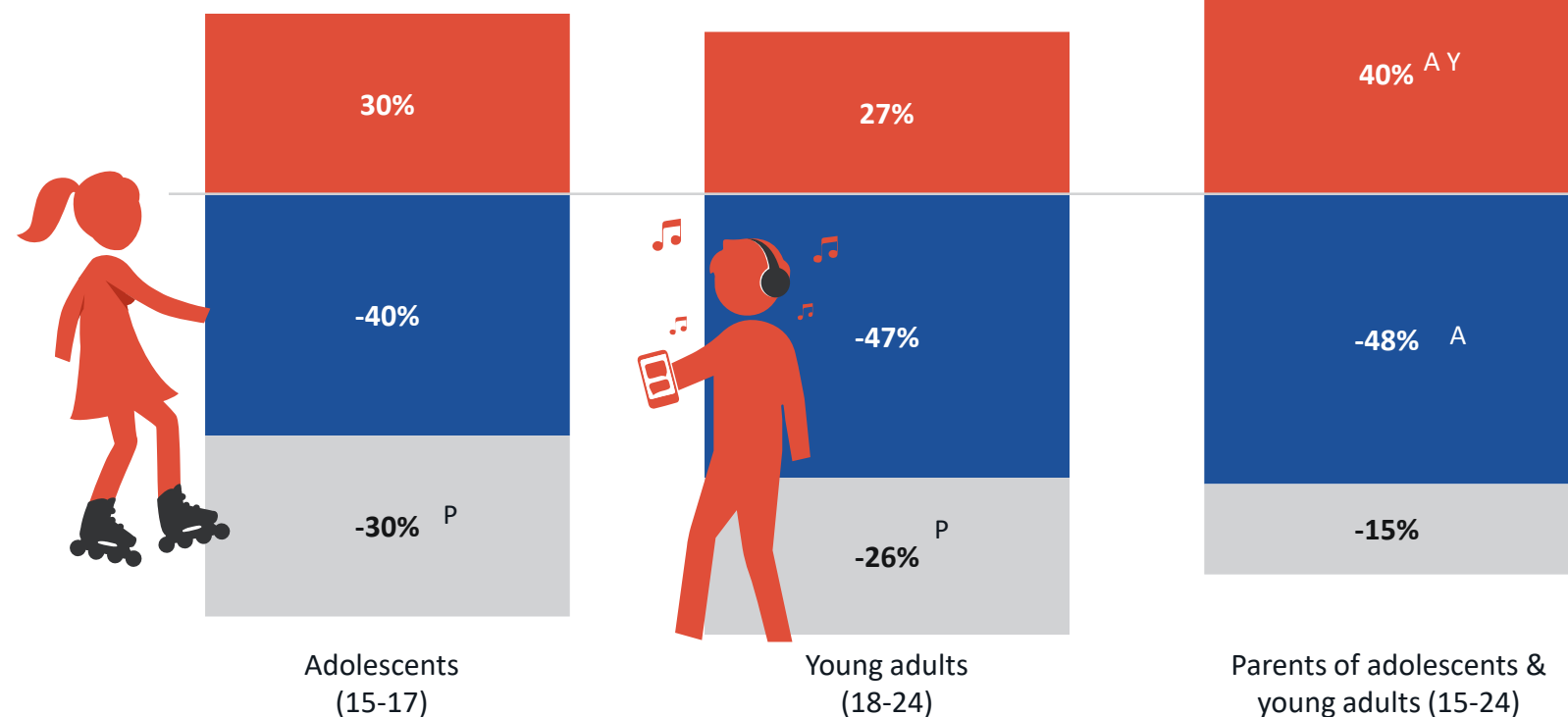
B2B (tend to /strongly disagree)

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)