

# IPSOS' GLOBAL VACCINES PORTFOLIO

The vaccine market already presents a complex dynamic – but a COVID-19 vaccine, the most anticipated vaccine in modern history, adds multiple new layers of complexity. Even if a successful launch were guaranteed, we still have many more questions than answers...

Organisations and governments need to understand their role in driving people towards vaccination, and whether their approach should be to guide or mandate. Economic and social recovery may be dependent on significant population compliance. Vaccine developers will be facing untold unknowns in terms of manufacturing efforts, storage and distribution requirements. Businesses will be anticipating the impact on their workforce, the evolving demand for their product/service and the corresponding shape of their communication strategies.

## Ipsos can provide the integrated intelligence & insight you need now

- Measuring demand for vaccines and the factors influencing demand
- Using behavioural science to get behind the willingness to vaccinate/recommend vaccinations
- Understanding the perceptions and interactions of healthcare providers
- Assessing similarities and variance versus prior vaccination behaviour and impact on future vaccination intentions
- Addressing myths and fake news
- Measuring support for regulations, distribution mechanisms and a return to activities
- Using multiple data approaches and sources, with delivery via an integrated platform.



Let Ipsos help you navigate this journey.

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GAME CHANGERS



# Vaccines: The Business-Critical Questions

Answering the questions you have and those you have yet to discover

## GOVERNMENTS & NGOs

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- What are the key population segments for management in the public sphere?
- What are the barriers to getting a vaccine?
- How do we triangulate effective communications (message, target and messenger)?
- What are people's key expectations around availability, responsibility and payment?
- What are the key elements of programme design?
- How should we approach facility issues (preferences, barriers, inducements)?
- How should we approach documentation issues (vaccine passport, privacy)?
- What are the key areas of responsibility for governments vs healthcare systems vs employers?
- How do we identify special needs groups?
- How do we deal with enforcement issues?
- How do we address myths and fake news?
- What are the perceptions of healthcare providers?
- What are the regulatory and distribution issues by country?
- What is needed to return to 'normal' activities?

## PHARMA & BIOTECH

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- Who will pay for the COVID-19 vaccine?
- What is the size of the overall market?
- How are patients and doctors interacting post COVID-19?
- Are doctors keeping wellness visits?
- Are doctors prioritising certain vaccines over others?
- How will the vaccines be distributed?
- What will be the guidelines in terms of who gets priority?
- How will the vaccines be stored?
- How will patients be monitored/tracked for side-effects?
- How do we educate the public, HCPs & pharmacists about the vaccine?
- How can pharma support HCPs and pharmacists?
- Which channels work best for HCP engagement?
- Are sales reps needed?
- How will boosters be tracked?
- How do we continue to draw people in to be vaccinated?
- What impact will other vaccines have, coming onto the market?
- How would a vaccine withdrawal from the market impact other vaccines?
- How do we navigate market access complexities, including in tender and out-of-pocket markets?

## BUSINESSES

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- What will be the impact of vaccinations on my workforce?
- How will demand for my product/service evolve?
- What should my reopening strategy be?
- What should my communications strategy be?
- Should we mandate vaccination?
- And many more...

# Vaccines: Uncovering the Answers

## Custom, syndicated & integrated solutions

### GLOBAL CUSTOM RESEARCH

Ipsos' custom research is designed to meet the needs of individual clients, utilising the wealth of vaccine knowledge within Ipsos. Projects will be led or supported by Ipsos' experts in public affairs, healthcare, behavioural science and data science as needed.

- **Public Affairs:** All governments will be confronting the challenges of rolling out vaccines to their citizens. Organisations will need to understand communications and how to influence policy. Ipsos has been working with public sector actors around the world on this and similar issues for many years. Combining our global expertise with the nuance only a local team invested in the local culture can bring, we can provide the most relevant information to assist with the design of effective policy responses and public communications.
- **Healthcare:** For pharma, the stakes have rarely been higher. Whether you have a vaccine in development or are considering the impact of a vaccine in your therapy area, Ipsos can guide you on opportunity assessment, brand planning, scenario planning, promotional assessment, multi-channel marketing planning and more – drawing on our wealth of vaccine knowledge, market-leading custom and syndicated research approaches, market access/HEOR capabilities and healthcare advisory services.
- **Supported by Behavioural Science, Data Science & More:** All demand forecasting work in the vaccines space will be consistently executed by our Data Science & Advanced Analytics CoE, while our proprietary behavioural science framework (MAPP) and social intelligence analytics approaches will be integrated into all projects wherever relevant. Ipsos' many other sector, market & methodological expert teams also stand ready to help you.

### GLOBAL SYNDICATED STUDIES

#### Consumer Studies

- **Syndicated Vaccines Study (Consumers):** Uncovering the attitudes of consumers in 15 countries towards flu and COVID-19 vaccines and upcoming treatments.

#### Physician, Pharmacist & Patient Studies

- **Syndicated Vaccines Study (HCPs):** Exploring physicians' & pharmacists' attitudes towards flu & COVID-19 vaccines and likelihood to recommend (covers EU5, US & Japan - pharmacists in US only)
- **Syndicated Payer Study:** Gathering payer perceptions on all aspects of pricing & market access, including vaccines
- **Global Therapy Monitors:** Inclusion of questions to understand uptake of COVID-19 vaccines, post launch, in at-risk populations in 30+ disease areas worldwide.

### OTHER INSIGHT SOURCES

#### COVID-19 Surveillance

- **Vaccine Atlas:** Available on client request, the Atlas draws from and integrates multiple different data sources in order to track changes in conversations around vaccines, status of vaccine approvals / availability, demand for vaccines, likely use of vaccines globally, and more...



# Why Ipsos?

## Understanding vaccines through the eyes of society, markets & people

Whether global or local, custom or syndicated, all our vaccines projects are underpinned by:

### THE IPSOS VIROLOGY & VACCINES CENTRE OF EXPERTISE

Ipsos' global Virology & Vaccines Centre of Expertise is comprised of researchers who have devoted their careers to understanding this complex market and helping our clients excel within it. Knowledge from this expert team is cascaded across our business and will be used to help answer your vaccines questions.

### A TRUE UNDERSTANDING OF COVID-19 IMPACT

When the pandemic struck in early 2020, Ipsos mobilised our global resources to understand the crisis. We quickly aligned with our market research partners to track the sea change ushered in by COVID-19. We've dedicated our staff's time and expertise to understanding the effect of the pandemic on our clients across sectors and countries.

### THE ONE IPSOS APPROACH

We believe our clients need more than a data supplier. They need a partner who can produce accurate and relevant information and turn it into actionable truth. Our passionate researchers draw on Ipsos' expertise and capabilities from across our global business, providing not only the most precise measurement but shaping it to equip our clients with a *true understanding* of society, markets and people.

Contact [Jackie.Ilacqua@ipsos.com](mailto:Jackie.Ilacqua@ipsos.com) or [Natalie.Lacey@ipsos.com](mailto:Natalie.Lacey@ipsos.com) to discuss your specific needs.

#### ABOUT IPSOS

Ipsos is the third largest market research company in the world, present in 90 markets and employing more than 18,000 people. Our research professionals, analysts and scientists have built unique multi-specialist capabilities that provide true understanding and powerful insights into the actions, opinions and motivations of citizens, consumers, patients, customers or employees. Our 75 business solutions are based on primary data coming from our surveys, social media monitoring, and qualitative or observational techniques. "Game Changers" – our tagline – represents our ambition to help our 5,000 clients to navigate more easily our deeply changing world.