

Does the Efluelda have a shot in the Dutch private market?

Report for Sanofi

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Amsterdam, April 2023

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Research setup



Research setup

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Research objective



To assess if there is a private market among the Dutch 60+ population for Sanofi's new, more effective high-dose quadrivalent influenza vaccine Efluelda.

Method



CAWI (online questionnaire)



Length of survey: 6 minutes

Fieldwork



From **April 3rd 2022** to **April 6th 2022**

Sample



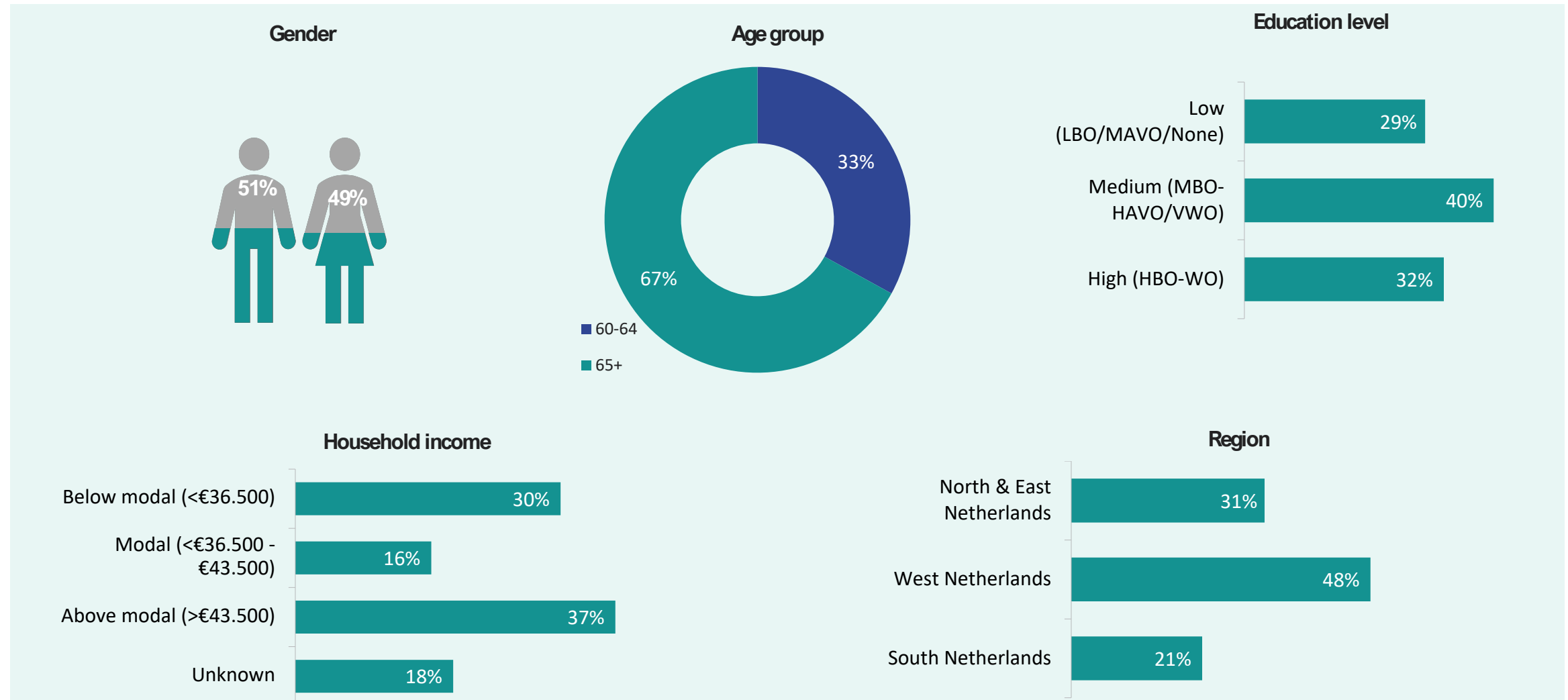
- n=400
- Dutch consumers
- Aged 60 years and older

See next slide for sample characteristics



Research setup

Sample characteristics



Base: all respondents (n=400)



Conclusions & key findings



Conclusions & key findings

There is potential for your Efluelda HD flu vaccine amongst the 60+ population, but the price & need to pay have to be justified:

- People need to understand the benefits of the HD vaccine vs. the current, free flu shot
- People need to feel that it is 'fair' they have to pay for it themselves
- The doctor needs to be on board: their endorsement would go a long way in motivating people to get the HD vaccine

1. People get the current flu shot mainly because they follow the doctor's 'orders'

- Almost 3 in 4 of the Dutch population aged 60 and over get the annual free flu shot;
- Main motivator is being invited for the flu shot by their GP;
- Feeling protected from falling ill is an important factor as well;
- Those who do not get a flu shot think influenza is not a serious threat to their health, or they question the vaccine's efficacy or safety.

2. The HD flu vaccine has potential, but the price must be justified

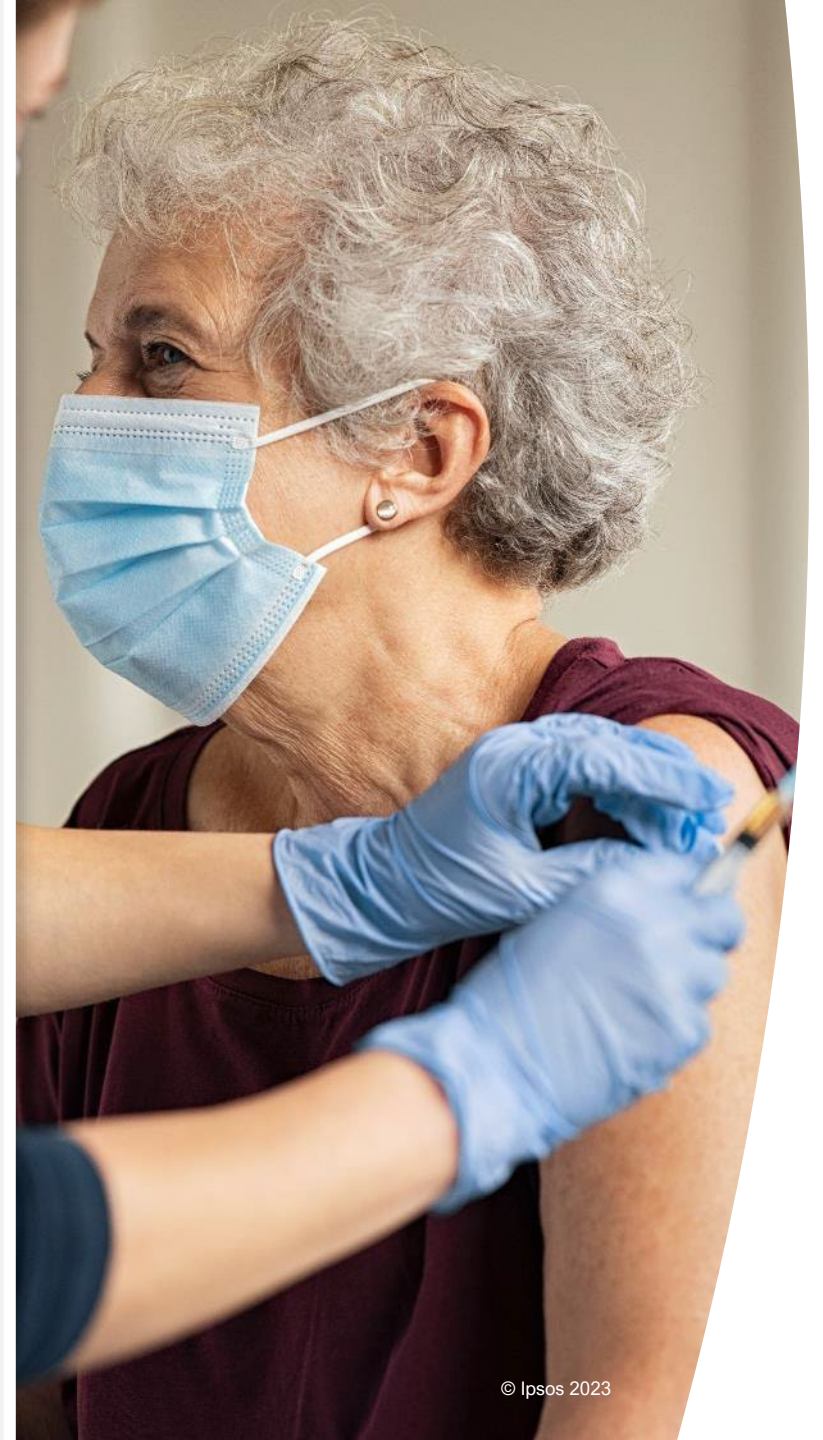
- There is a willingness to get a more effective HD flu vaccine, even if it means paying for it;
- 45% of the 60+ population would definitely/ probably be willing to pay €60,- for it;
- At a higher price, the willingness to get the HD shot quickly declines. Lowering the price does little to increase it;
- Main driver is an improved feeling of security, while the need to pay is offset to some degree by the importance of health ("You cannot put a price on your health");
- Endorsement by the GP/ specialist could be a strong motivator as well;
- Still, price and the need to pay pose strong barriers. Not only because of the amount they would have to pay, but also because it is seen as unfair (they already have health insurance, not everyone can afford it, the government should pay for it etc.).

Most important insights



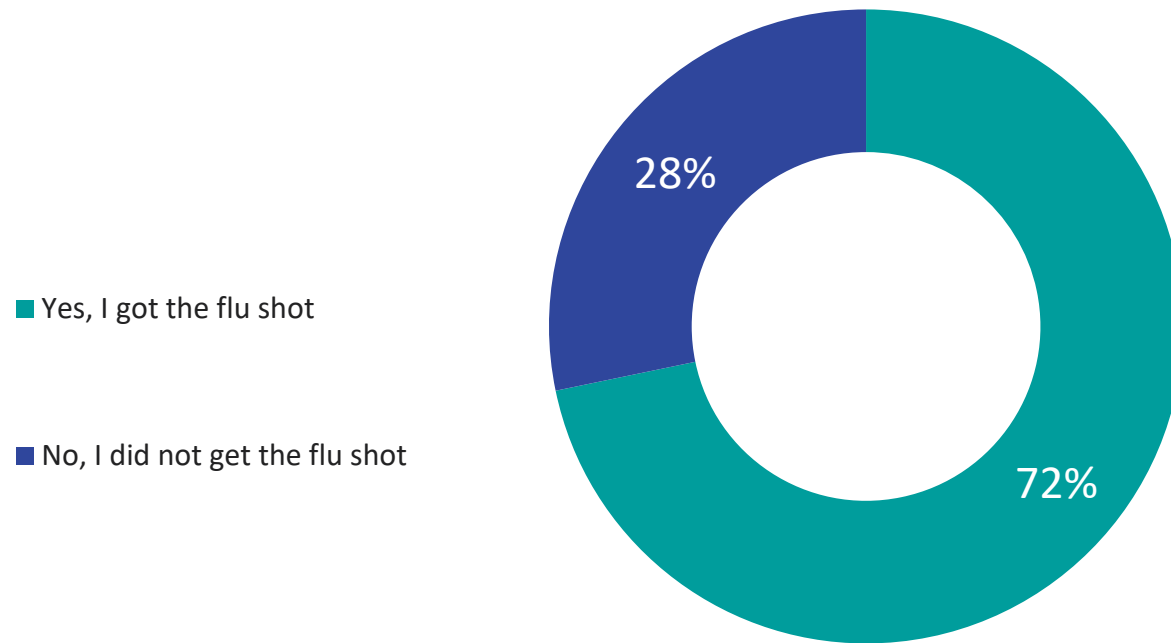
1.

People get the current flu shot mainly because they follow the doctor's 'orders'



Willingness of people aged 60+ to get a flu shot is high, with almost three in four getting vaccinated last fall

Getting the flu shot in 2022

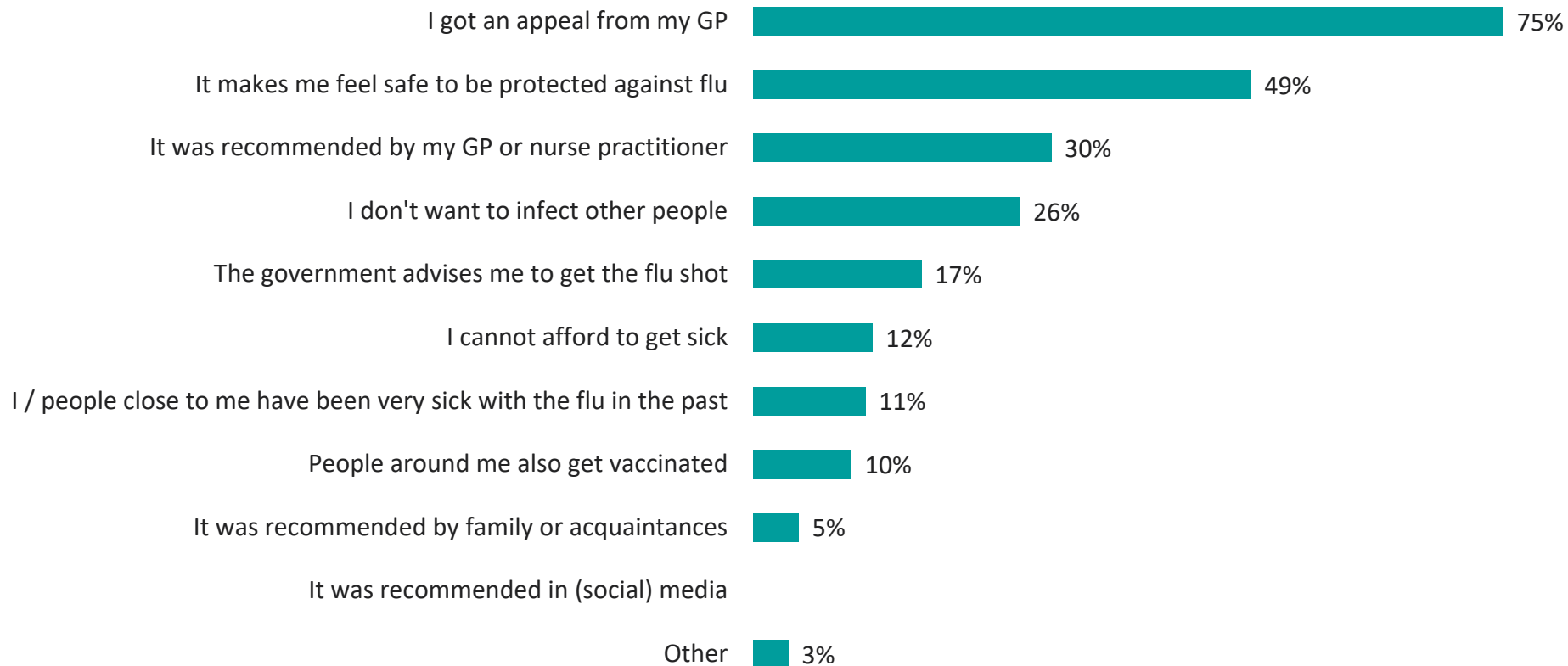


People in the 65+ age bracket comply more often to their GPs invite for a flu shot than the younger age group (79% vs. 58%).

There are no significant differences between different genders, education or income levels.

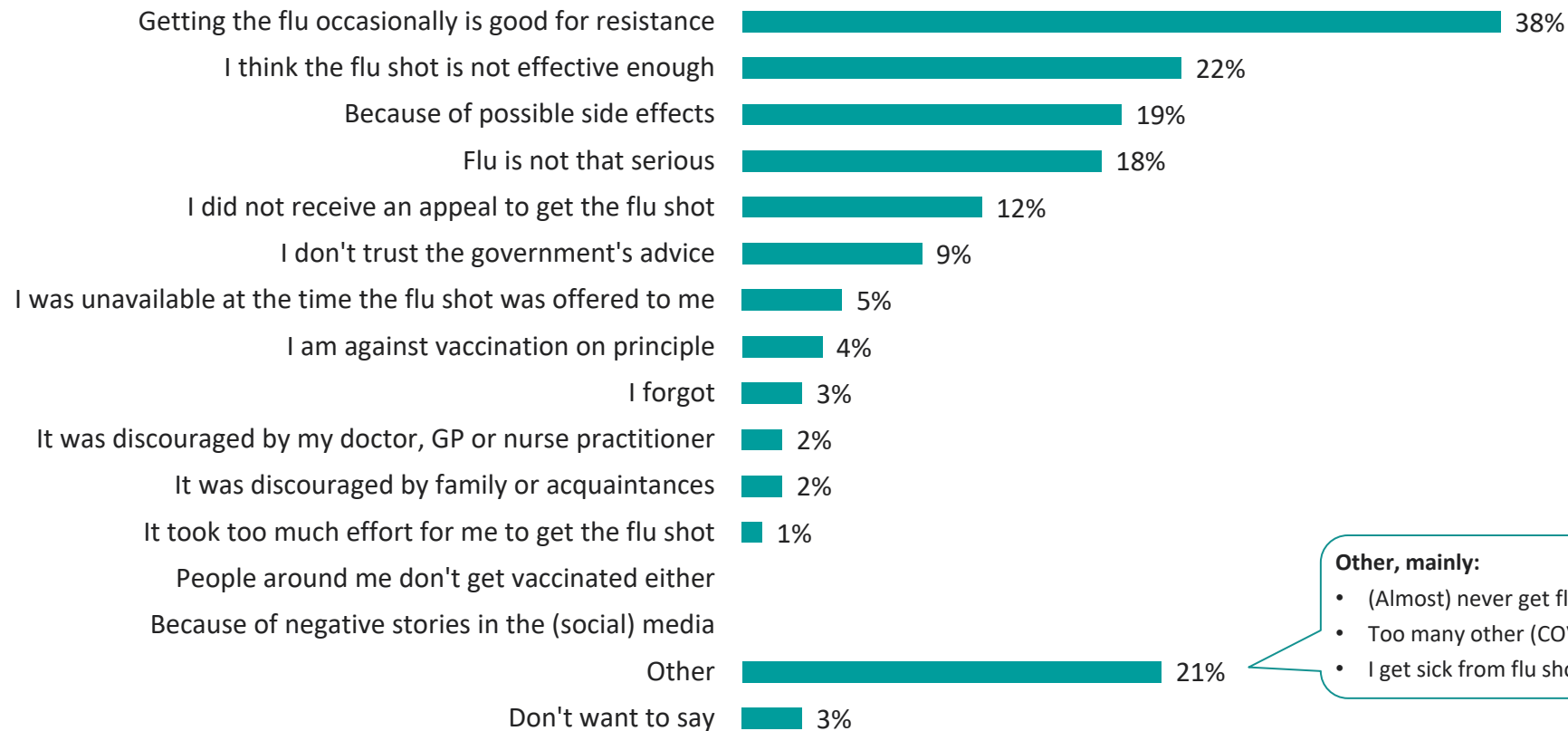
Those who got their flu shot are mostly vaccinated because they were called in by their GP, but it also makes many feel safer

Main reasons for getting a flu shot in 2022



People who declined their flu shot either downplay the risks involved with the flu or question the vaccine's efficacy or safety

Main reasons for not getting a flu shot in 2022



Men and people with higher levels of education are more inclined to question the need for, and efficacy of, the flu shot than women and those with a lower level of education.

Other, mainly:

- (Almost) never get flu/ do not need it (10x)
- Too many other (COVID) vaccinations (5x)
- I get sick from flu shot (3x)

Click the icon to view the unedited open answers:

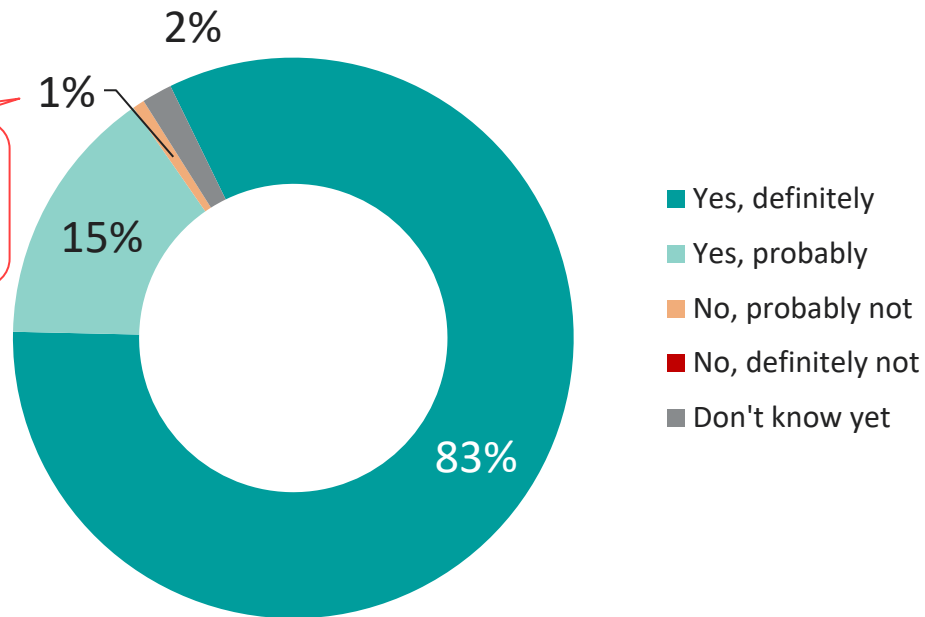


Q2.5

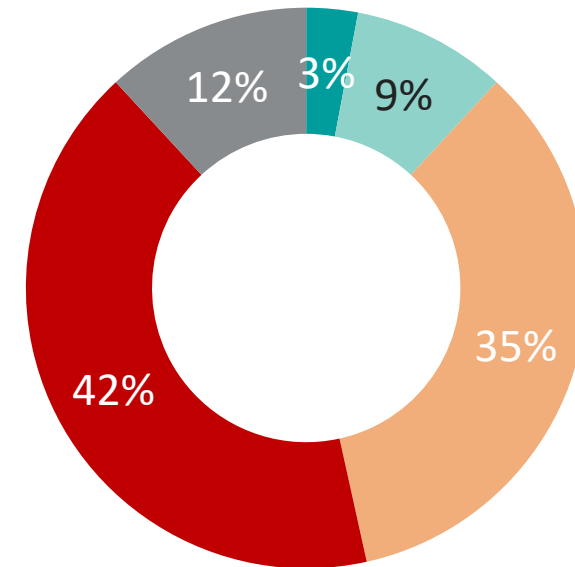
Most people expect they will do the same this year, when it comes to getting the flu shot or not

Intention to get flu shot in 2023

Did get flu shot in 2022 (n=287)



Did not get flu shot in 2022 (n=113)



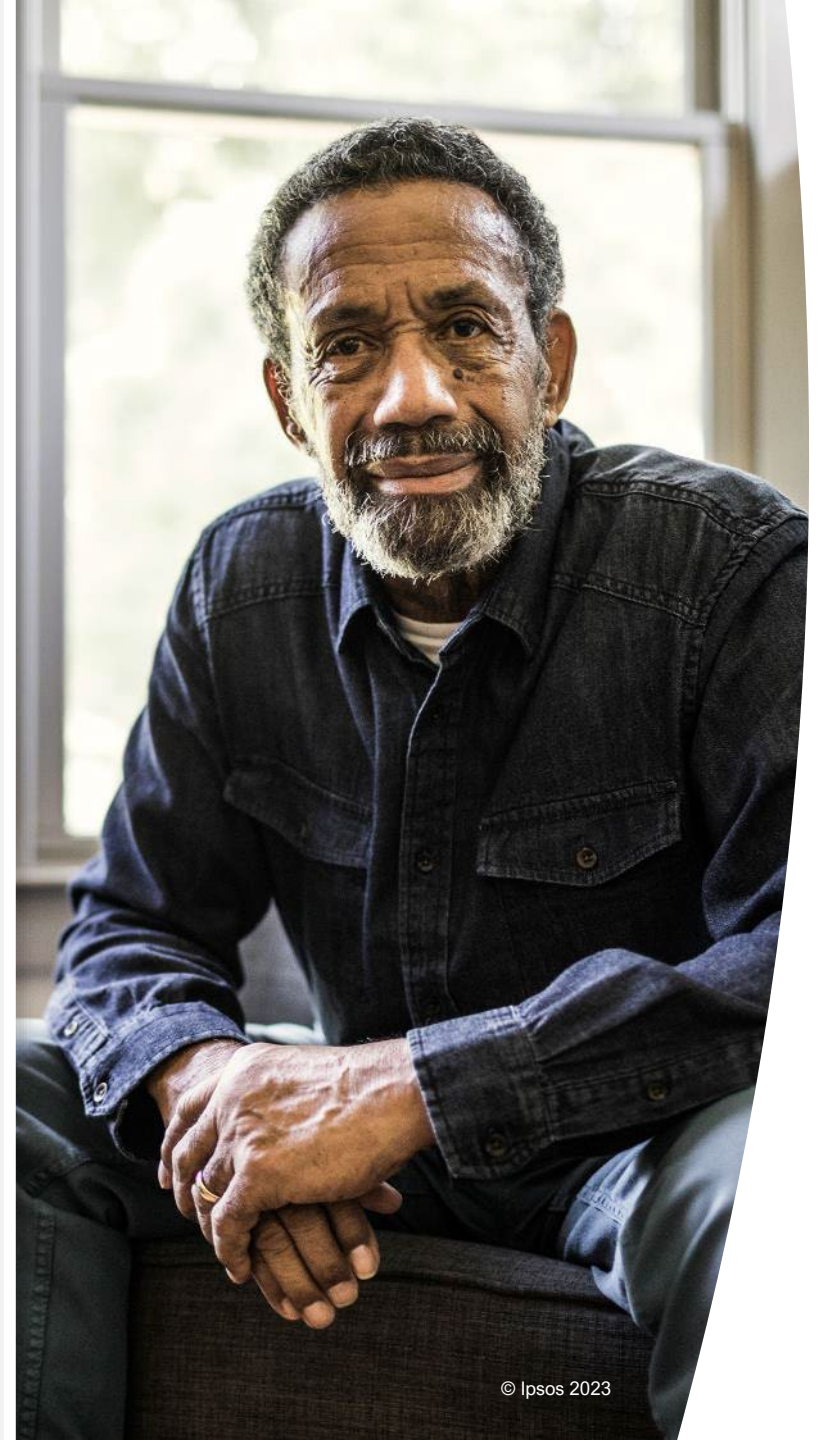
Q2.3. Are you planning to get the flu shot this autumn (2023) as well? Base: did get flu shot in 2022 (n=287)

Q2.4. Can you briefly explain why you are (probably) not going to get the flu shot this year? Base: will not get flu shot in 2023 (n=2)

Q2.6. Are you planning to get the flu shot this autumn (2023)? Base: did not get flu shot in 2022 (n=113)

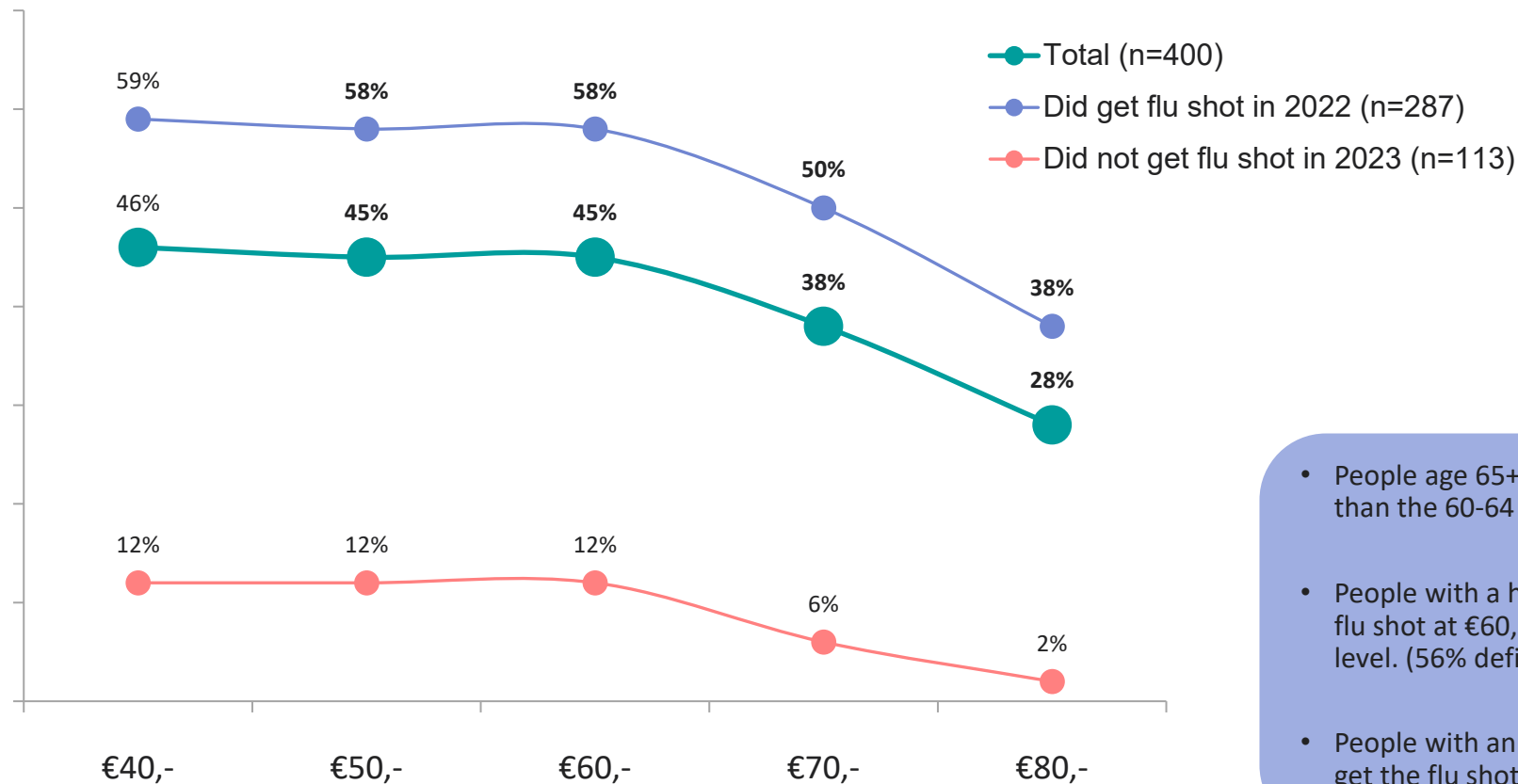
2.

**The HD flu vaccine has potential,
but the price must be justified**



Almost half is interested in the HD vaccine at €60,-. A lower price does not increase demand, and demand quickly declines if the costs exceed €60,-

Willingness to buy HD vaccine vs. price



New flu vaccine

The current flu vaccine reduces the chance of getting the flu by about 40%, and if you do get the flu, the illness often runs milder. Suppose a new flu shot becomes available that offers higher protection against the flu and its consequences, such as hospitalization, lung and heart problems, strokes, among others. However, unlike the current flu shot, it is not free.

- People age 65+ are more inclined to get the flu shot at €60,- than the 60-64 age group. (50% definitely/ probably vs. 34%)
- People with a higher education level are more inclined to get the flu shot at €60,- than those with a medium or low education level. (56% definitely/ probably vs. 41%/ 39%)
- People with an higher than modal income are more inclined to get the flu shot at €60,- than those with a lower income. (55% definitely/ probably vs. 36%)

People would get the HD vaccine because it offers them security, in the knowledge that one's health gets weaker with ageing. However, many still feel it should be free/ reimbursed

Reasons for getting the HD vaccine

"Had severe flu again 2022/2023 and without the flu shot I would have been hospitalized"

"I simply don't want to get sick, I but find it absurd that it has to be paid for. After all, by preventing serious illness it will relieve the healthcare system"

"I turn 75 years old this year and think it would be wise to prevent a flu infection or make it less severe"

"Makes you feel safe and compared to a serious condition, the costs are dwarfed"

"I have underlying health issues and I feel I need to reduce the risk of serious diseases. For myself and for those around me"

"What is this amount compared to a year with uncertainty?"

Click the icon to view the unedited open answers:



Q3.7

Those unwilling to get the HD vaccine think it costs too much and offers too little. Even more so as the costs of living, especially healthcare costs, are already high

Reasons for not getting the HD vaccine

"Too pricey, I'd rather take the risk of getting a little flu"

"The risks are limited for me, so I don't want to spend a lot of money on this vaccine"

"The price not commensurate with the degree of extra protection"

"I already pay enough for healthcare. Furthermore, a lot of people will be excluded because they cannot afford it. Also, it becomes an entitlement only for the rich and the poor are allowed to die. So it would be a shame for such a rich like the Netherlands"

"The cost is too high for us, we are pensioners and need to save every Euro"

"The current, free flu shot offers enough protection"

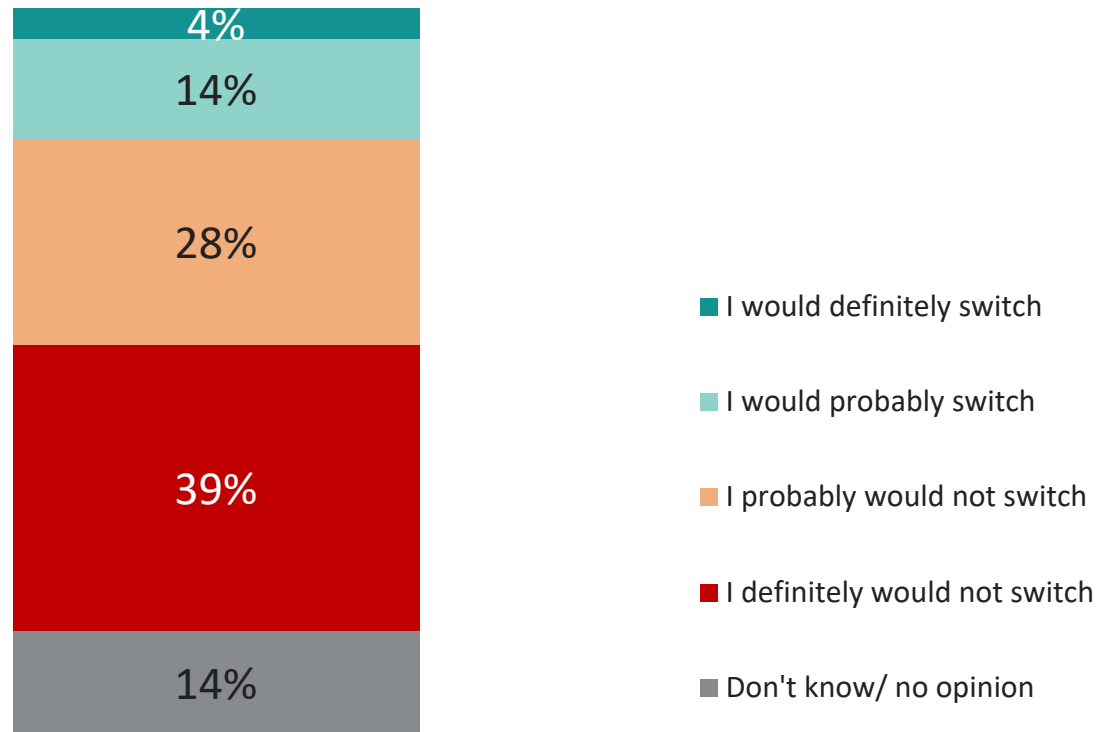
Click the icon to view the unedited open answers:



Q3.6

One in five people who are unwilling to pay for the HD vaccine would consider switching to an insurance that does cover it

Switching health insurance for HD vaccine?

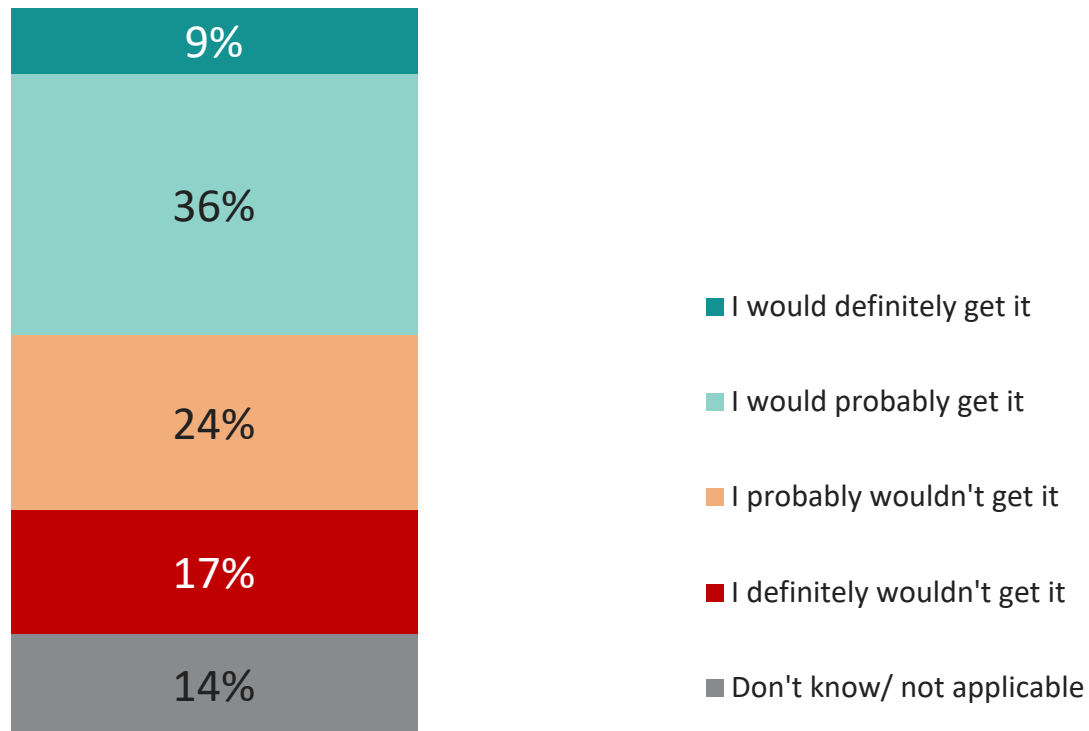


Q3.8. Suppose this new flu shot is not covered by your current health insurer, but is covered by another health insurer (in a supplementary package). To what extent would you then be willing to switch to this other health insurer?

Base: would (probably) not get new flu vaccine at lowest price (n=216)

Half of them would however be convinced by their doctor's advice to take the HD vaccine

Get HD vaccine on doctor's advice?



Men seem more inclined than women to get the HD vaccine on their doctor's advice. (51% vs. 38%)