

Flu Private Market

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Version 1 – This document contains 116 pages.

Agenda – a 360 vision



01

Qualitative
Research among
decisors in
physician's groups

02

Physicians
recommending/
applying vaccines

03

Vaccinated Patients
perceptions, drivers
& barriers



Pharmacovigilance

0 adverse events were recorded during the study

To ensure the submission of information, a conciliation process will be implemented at the end of the study (qualitative + quantitative).
A total of 1 conciliation were carried out during the study:

Conciliation Period	Submission of conciliation	Confirmation of Receipt
April 11 th to May 3 rd , 2023	May 11 th , 2023	May 11 th , 2023

Content



- 01 Background & Objectives
- 02 Methodology & Sample
- 03 Context: Flu
- 04 Vaccines: Flu
- 05 Conclusions and Recommendations

GAME CHANGERS

Key decisors in physicians groups



Background and objectives

1



BACKGROUND

In the context of a competitive flu season and Covid-19 environment, it is important to understand the current and future perception of both, doctors and patients, in order to find opportunities for growth.

These results lead to new relationship building and communication strategies with healthcare professionals, doctors and pharmacies.



OBJECTIVES

sanofi

- To know the brand selection dynamics for influenza vaccines in different groups of vaccinating doctors in the private sector.
- To know the procurement process. Types of vaccines they buy.
- To identify preferred suppliers and distributors or labs they buy from.

- Find out if laboratories or suppliers provide support and if they are visited by the sales force.
- Know commercial discounts and type of service offered by different providers.

3

Context

Flu

BEFORE AND AFTER COVID 19

PANDEMIC AWAKENED INTEREST

- Patients became more receptive to information about vaccines. Feelings of protection.
- The pandemic left as a lesson the benefit of getting vaccinated, and the risk of not doing so.
- Benefits of vaccination: patients who experienced it through their own experience or that of their intimate circle: hospitalizations, deaths or other consequences.



Aside from the fact that they have a preventive function, it works as a placebo. The patient feels confident, relaxed, forewarned. Geriatrician

ID-19 pandemic reduced the barriers to vaccination schedules. It made the vaccination issue visible in society; everyone was talking about it.

JENZA VACCINE



flu vaccine WAS FAVOURED IN THIS VACCINATION.

People acknowledge a SIGNIFICANT INCREASE IN DEMAND FOR INFLUENZA VACCINES. Mainly, patients with risk factors (chronic diseases, immunocompromised, older adults), proactively ask about the vaccine.



I get the vaccine. Nowadays, they are more insistent than me, a doctor. Internal Medicine

BENEFITS OF GETTING A FLU VACCINE



Many doctors and patients may not be as concerned about getting a flu vaccine because they know there is a specific treatment. Pediatrician

Unlike COVID-19, having flu treatments decreases the perception of severity or lethality. However, they stress the benefit and need to be vaccinated.

Prevent severe respiratory pictures, consequences. Avoid hospitalizations and deaths.

Cover the different subtypes or strains that evolve every year.

Vulnerable groups: the possible complications of the associated conditions and their lack of control add to the conditions of the disease

PRIORITY GROUPS FOR VACCINATION

Profiles of patients with greater vulnerability, with a greater risk and need to be vaccinated were identified. Similar to priority groups for COVID-19.

OTHER VACCINES

In addition to the flu vaccine, the COVID and pneumococcal vaccines are the most indicated for these groups of patients..

ADULTS

Older adults, 60+ years. Age-associated decline in immunity.

CHILDREN

From 6 months to 5 years. Add the pregnant women.



In CHILDREN, from 5+ years on, control and interest in annual reinforcements is lost. There is no follow-up from the doctor or the parents.

CHRONIC DISEASES

Patients with chronic diseases, comorbidities, regardless of age. Obese.

IMMUNOCOMPROMISED

Patients with immunosuppressive or immunomodulatory treatments.

HEALTHCARE PROFESSIONALS

Increased risk of contagion by contact with patients and hospital institutions.

APPLICATION OF VACCINES IN OFFICE

They begin placing orders for flu vaccines between July and August. They are given between September and January.



REASONS FOR VACCINATION IN PRIVATE

- Patient trusts the doctor.** Patients take their family group to get vaccinated.
- Safety: the patient and the doctor are confident** that the vaccine complies with the appropriate storage rules and procedures.
- Comprehensive patient service.**
- Additional money income.**



BARRIERS AND OPPORTUNITIES

- In the majority there is no follow-up after the application** of the vaccine: adverse event or appointment/call in the following year for the booster.
- Children:** opportunity to strengthen and ensure the **follow-up of the annual reinforcement for 5+ years patients.**
- Once the vaccination scheme is complete, parents come only if there is an emergency.

MECHANISMS TO INCENTIVE VACCINATION

- Doctors, **willing to promote vaccination**, carry out **vaccination days for influenza**, as the winter season approaches.
- They invite colleagues from the clinic or group of doctors** to which they belong to encourage their patients and families to get vaccinated.
- Promotions or discounts for family groups.



ADVANTAGES OVER THE PUBLIC SECTOR

- Greater coverage of the quadrivalent vaccine versus the trivalent.**
- Practicality** : Time reduction. Avoid standing in long lines at the public institution.
- Confidence** that the cold network is respected, and that the **vaccine is in good condition**.
- The intention is to **make a difference** with the public **to give added value** to the patient that justifies the charge.

4

FLU VACCINE

Distributor
Fluzone & Fluzactal

WHAT DO YOU LOOK FOR IN A VACCINE DISTRIBUTOR?

1.

Guarantee the cold chain.
Appropriate conservation.

2.

Supply: ensure the availability of the vaccine. Offer options. *

3.

Cost. Financing. Payment conditions. Bonuses.

4.

Capacity to respond. Speed and punctuality in delivery. Regardless of the amount, have it delivered to the office.

5.

Fluid communication. Service. **Added value :** example, application kit (multidose).

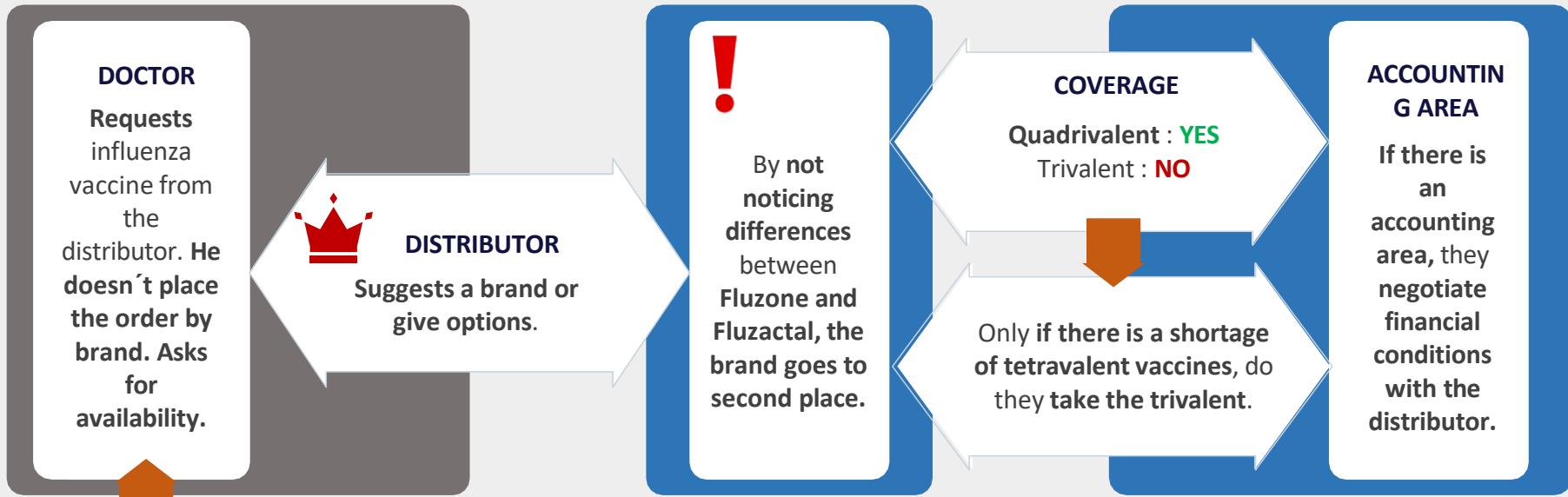
* A greater shortage of influenza vaccines, of both brands during the pandemic was identified.

Influenza vaccines are purchased through distributors. They have a main supplier and a backup in case of any eventuality.

Distributor	CDMX	Guadalajara	Monterrey
Birmex			
Bio Tec			
Civax			
Pro Inmune (2)			
Farmacias Especializadas			
Termicast			
Salubox			
Leucotec			
Centro de Vacunación Monterrey			
Drogas y Enseres para Hospital			
Comercializadora Cínica Hospitalaria			
Sanofi (dos médicos)			

DISTRIBUTORS: PURCHASING DYNAMICS

The distributor plays an extremely important role when choosing a certain brand of influenza vaccine.



FLUZONE AND FLUZACTAL

Under normal storage conditions, respecting the cold network, THEY DO NOT IDENTIFY DIFFERENCES. THEY SEEM THE SAME.

EFFECTIVENESS

- Effectiveness: Quadrivalents. Same coverage. Two type A and two type B strains. Same mechanism of action.

SAFETY

- They do not have serious adverse effects reported.

OPTION

- In both brands they have the option of multidose and pre-filled syringe. *

SUPPORT

- Both prestigious and trusted laboratories.

ot identify differences in relation to efficacy and safety. The choice is not based on performance or technical characteristics between the two vaccines.

What gains the preference towards a certain brand will be :

DISTRIBUTOR - MANUFACTURER RELATIONSHIP

- The distributor's predilection to choose a certain brand, pre-established agreements with the manufacturer.

AVAILABILITY

- Supply. Delivery times.

FINANCIAL ASPECTS

- Costs, promotions, bonuses.

CUSTOMER AGREEMENT DIRECTLY WITH THE MANUFACTURER

Without going through a distributor.

MULTIDOSE OR PRE-FILLE SYRINGE



MULTIDOSE

- ✓ Perception of **lower cost**.
- ✓ Less garbage. Environmental care. (throughout the day)
- ✓ Ideal when they have **many patients scheduled in one day or whole families**
- ✗ Once the vial is opened, the content **must be used within a certain time**. Less expiration time than that of the syringes.

We know how to handle multidose and find it lowers costs and we can vaccinate more patients
Pediatrician

ference towards multidose or a pre-filled syringe is given by the number of patients to be vaccinated and the perception of lower cost of the multidose vial.

PRE-FILLED SYRINGE

Greater perception of practicality. No need to prepare the syringe.
Safety, less manipulation and probability of making a mistake in the dose.
Image and patient confidence: difference between vaccines applied in the public sector.

cation is easier. There is no data of "little more or less" regarding dosing; this is a bottle for 10 and we ended up with nine. General medicine

COMMERCIAL ASPEC^T



Distributor Initiatives

When purchasing ten vials or pre-filled syringes, they get two more, for free.

Discount, up to 30%, as a loyalty reward for buying over 5.

depending on the batches. As the expiration date is, the cost of the vaccine is lower.

surplus vaccines, the distributor will replace them at one of the year: "if you bought for 2023, I will give 20 that are left over as additional, I will replace them, with expiration date of 2023". **Pediatrician**

AGREEMENT BETWEEN THE MANUFACTURER AND CUSTOMER

WHEN THE DISTRIBUTOR IS NOT THE FIRST CHOICE

Medical corporations, such as Grupo Ángeles (Clínic Londres) and Star Médica, which buy a significant volume of vaccines, **the agreement is directly with Sanofi.***



We talked directly with the company and it has worked for us. A representative from Sanofi Pasteur came to the clinic to meet us.

Internal Medicine



The company purchases medicines from Sanofi with vaccines. They have scholarships for doctors and bonuses.

Geriatrician

* Only Sanofi was mentioned in this scheme. They didn't mention GSK

ho buy large amounts approach the manufacturer, searching for certainty that have the required doses and a better price.

Sanofi

CERTAINTY

They guarantee the availability of the vaccine. Security of having the required doses.

CONSOLIDATED PURCHASE

For all hospitals in the group. Other drugs are purchased together with the vaccines.

N B: ANOTHER HAND

However, they have a backup distributor, in case the first one does not have the necessary doses.

BETTER PRICE

Convenient financial arrangements: bonuses, payment terms, etc.

SALES FORCE

Three doctors report being visited by Sanofi Pasteur's **special vaccine sales force** and one by GSK. Two of them are the **companies that do business directly with Sanofi Pasteur.**

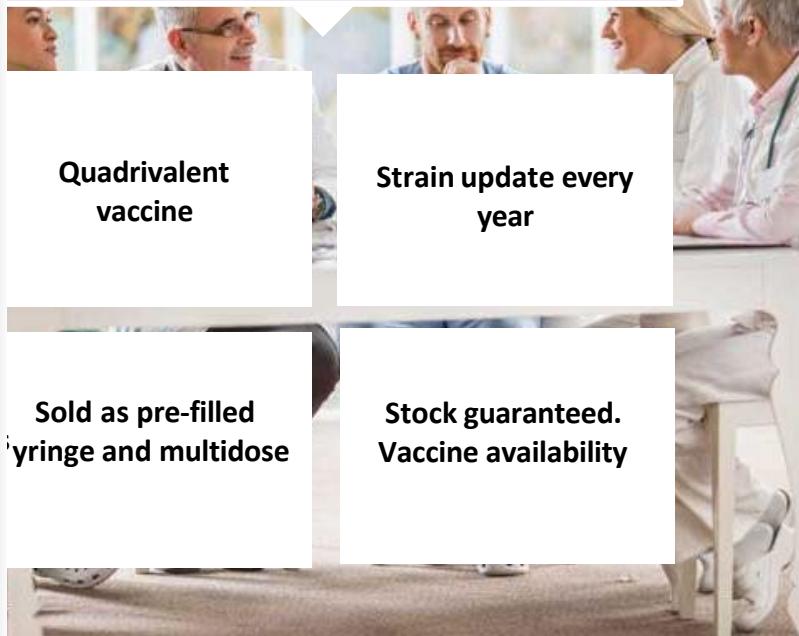
Most of them also being visited by Sanofi Pasteur's sales force. In therapeutic areas that mention vaccination, reminders



I have been working with the suppliers for years, I never pay attention to what the laboratories tell me. I just ask if it caused any side effects. Pediatrician

nal: Communication on influenza infection increases beginning in the fall.

Same message for Fluzone and Fluzactal



Quadrivalent vaccine

Strain update every year

Sold as pre-filled syringe and multidose

Stock guaranteed. Vaccine availability

CONTINUING MEDICAL EDUCATION

Usually, they receive more **information** about the different vaccines from the **distributor** than from the manufacturing **laboratory**. The information they receive from the distributor, although basic, is useful: new strains, coverage.

From the manufacturer, the expectation is to have supporting scientific information: new adverse events, clinical studies, efficacy.

GSK invitation to an academic event on Herpes Zoster. There is a **greater promotional effort** from the laboratory in this new vaccine.

Opportunity for Sanofi Pasteur to get closer to train new medical and nursing staff in charge of applying vaccines.

- Identify the different vaccines.
- Tradenames.
- Contraindications
- Possible adverse effects.
- Mechanism of action.
- Coverage.

no activity in relation to EMC from
ine manufacturing laboratories.



We don't have any, it's been a long time since they held a symposium or congress, or scientific breakfast.

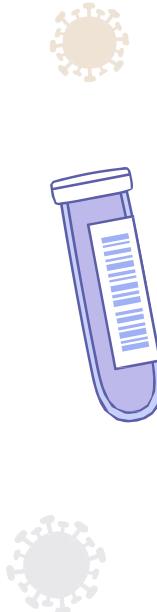
General Medicine

They approach us and say "this is this year's change, this is presented like this and that". They give better explanations than the laboratory.

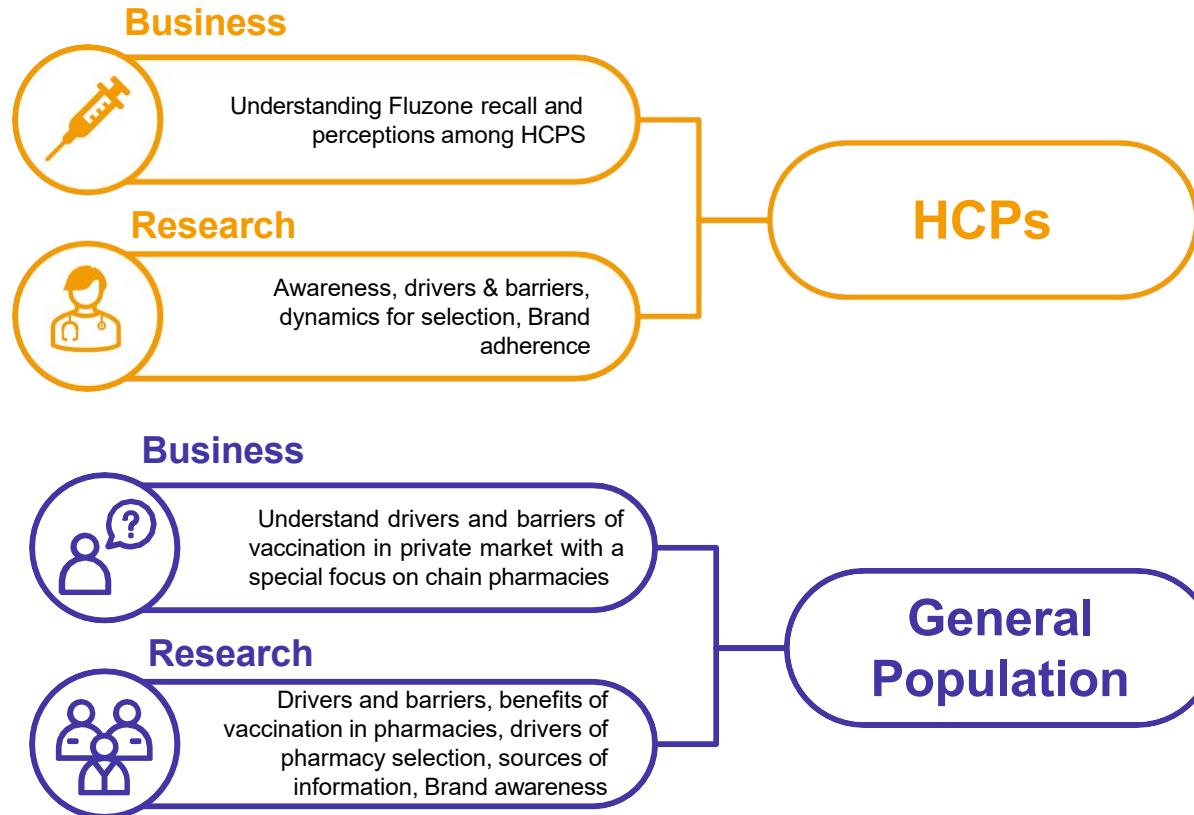
Internal Medicine



HCPS



Objetives



Physician Profile

Practice

Gender



Private

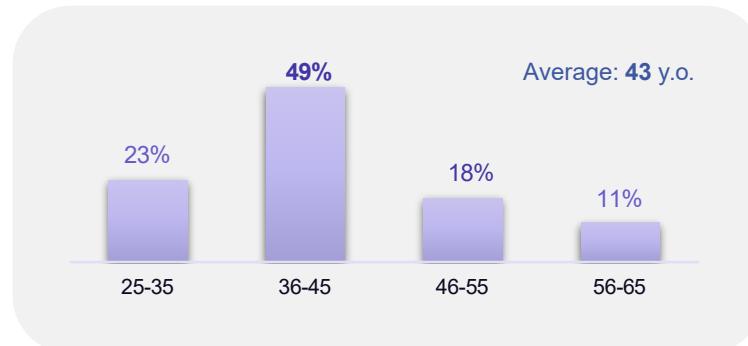
Public

Px per Month
Average

155

125

Age

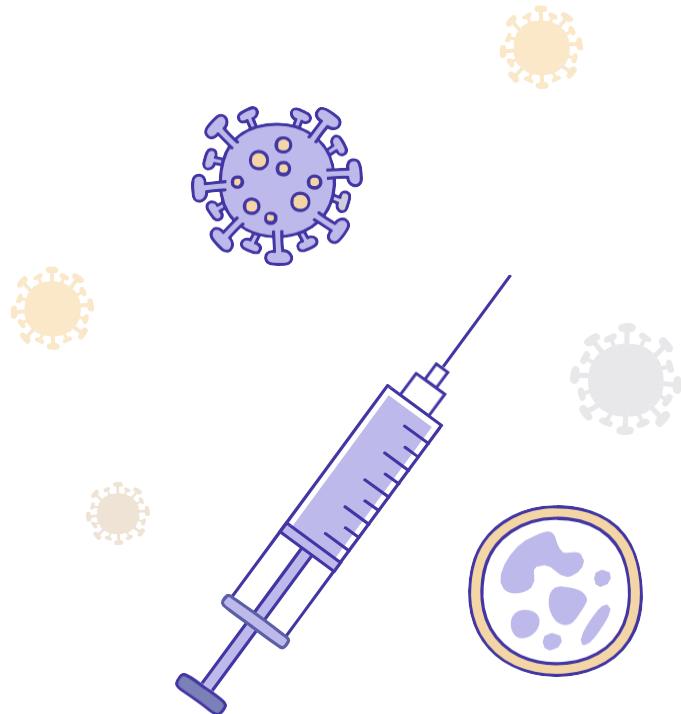


Base

n = 185

F1. Gender, F2. City, F3. Age, F4. Specialty, F5. How many patients do you see in your practice regardless of the disease per month?

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01

Vaccines

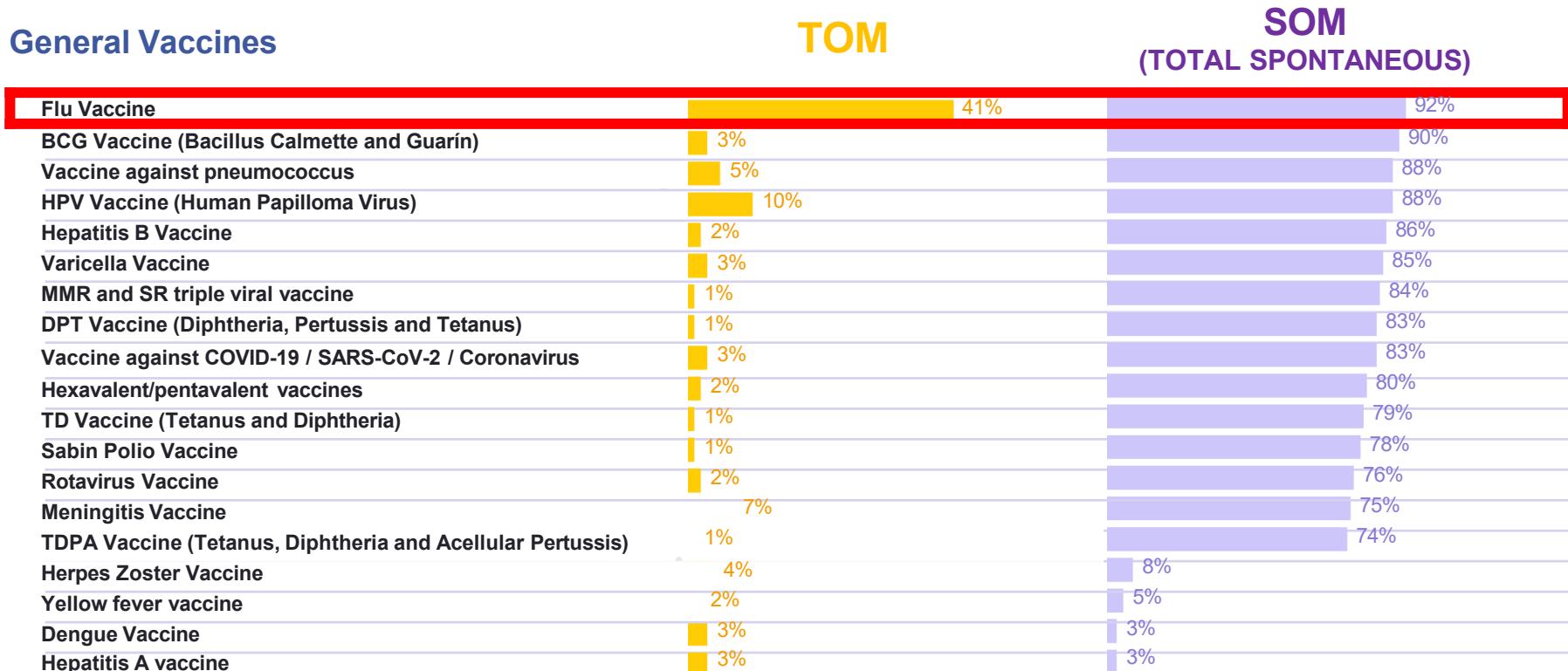
General knowledge



TOM & SOM

General Vaccines

Flu vaccine is by far the most recalled by HCPs in their practice followed by HPV (TOM) and BCG pneumococcus



Multiplicity: 12.6

Base

n = 185

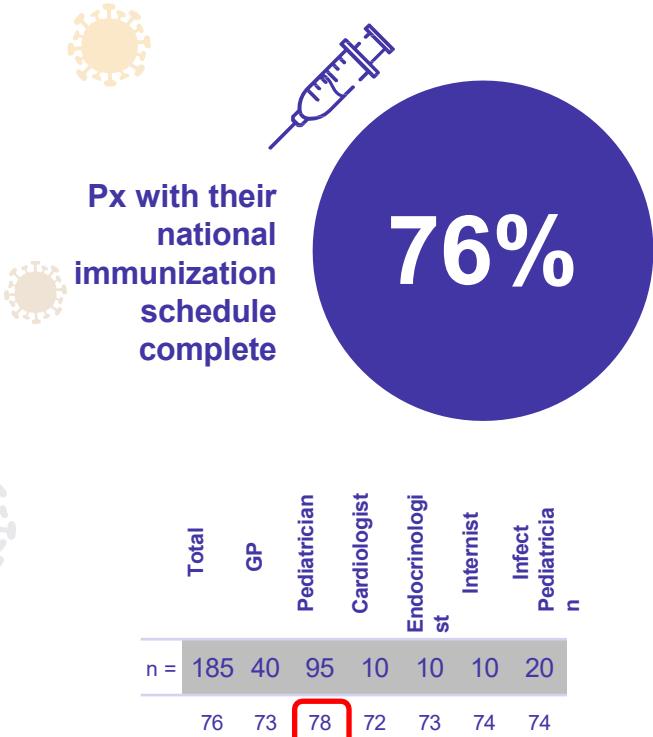
P3a. Within your clinical practice, what vaccines do you know, or have you heard of, even if you have never prescribed or applied them?

P3b. Within your clinical practice, what other vaccines have you heard of, even though you have never prescribed or applied them?

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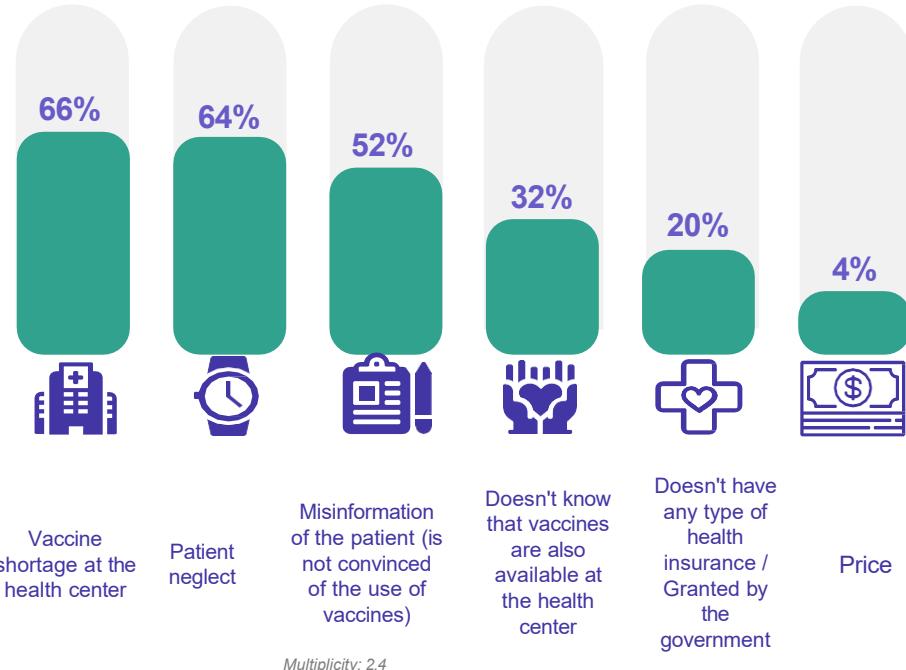
Immunization Schedule

sanofi



Immunization is perceived to have a good coverage, specially among pediatricians, with opportunities in physicians attending adults, but most important barriers for completion refer to shortages or patient rejection.

Reasons to not complete the schedule



P1. Of the patients you see on average in a month in your private practice, what percentage have completed their national immunization schedule (cartilla)? P1a. What are the reasons why a patient you see in the private sector has not completed his or her national immunization schedule?

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02

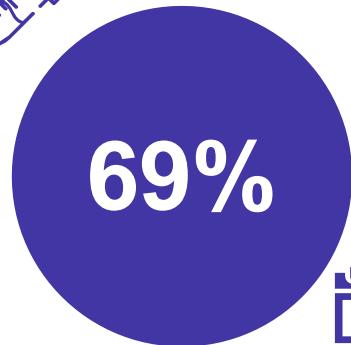
Flu vaccine



Flu Vaccination



Px with flu vaccine



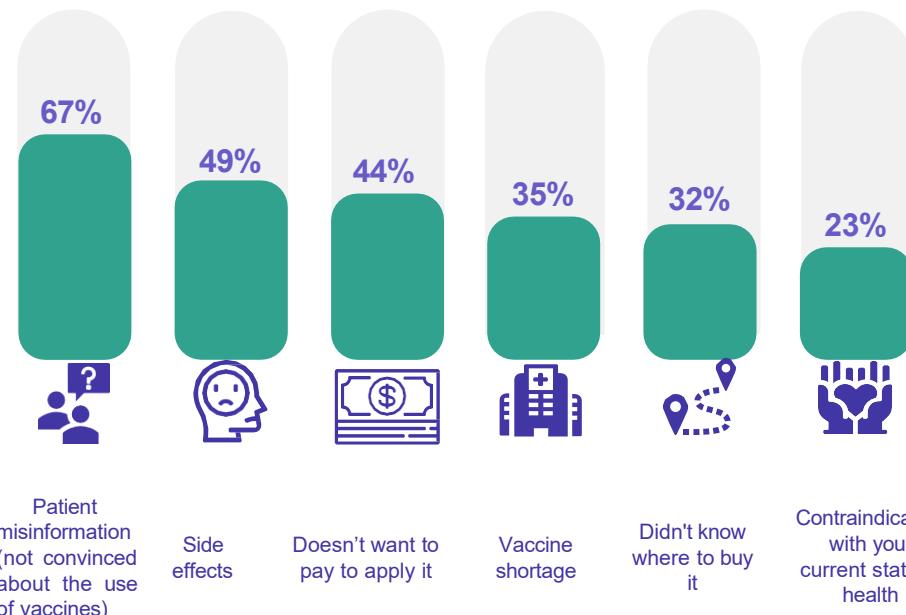
October 2022
to present

Total	GP	Pediatrician	Cardiologist	Endocrinologist	Internist	Infect	Pediatrics	n
n = 185	40	95	10	10	10	20		
65	70	68	70	68	73	65		

Base = 185

3 out of 10 patients have not received the flu vaccine, the main reason is the Px misinformation and the side effects.

Reasons to not receive any doses of flu vaccine



*Small base

Multiplicity: 2.5

P2. Of the patients who attend an average month in your private practice, what percentage received the influenza vaccine in the current season (October 2022 to the present)?
 P2a. What are the reasons why some of your private sector patients have not received any doses of flu vaccine?

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TOM & SOM

Flu Vaccines

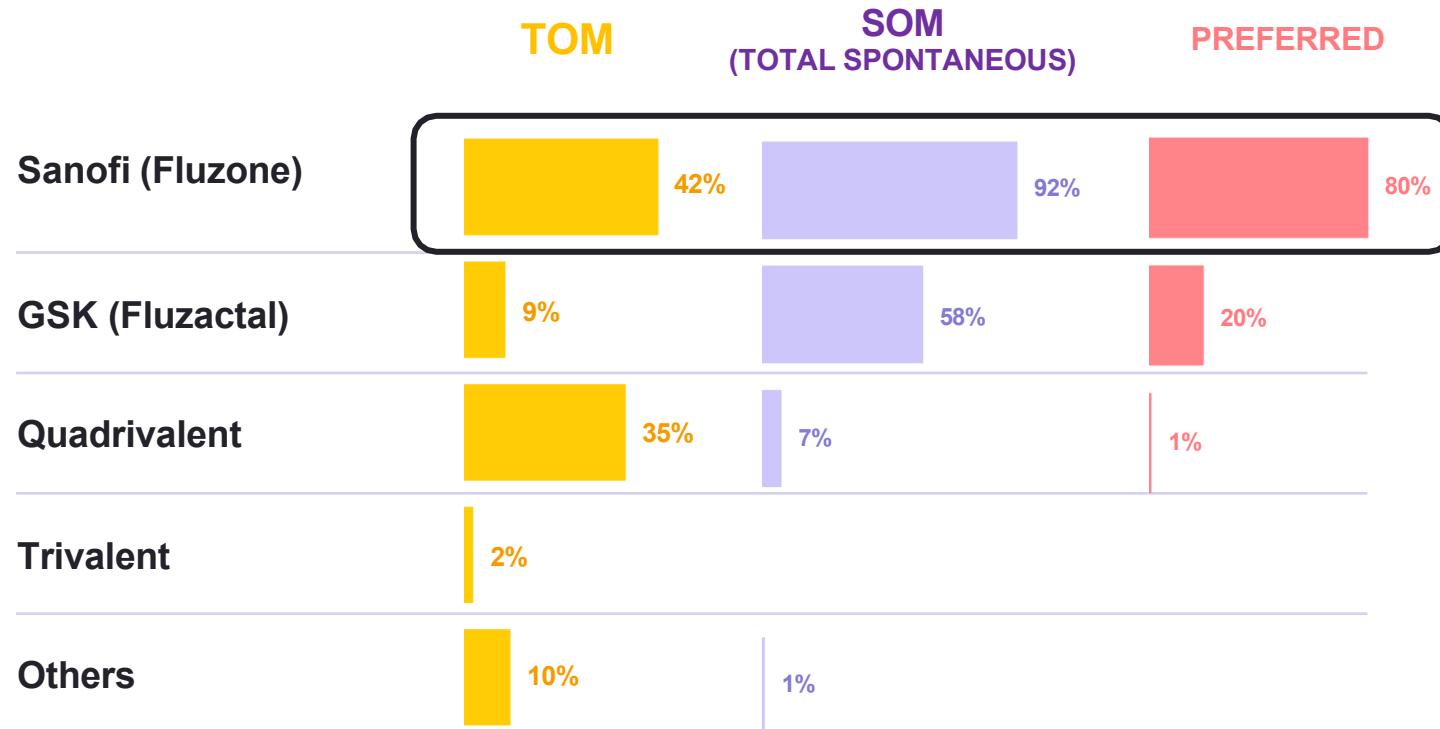
Fluzone is the preferred vaccine and the first in the physicians' minds.



"Influvac", "Vaxigrip" "Fluarix",
"Flublok", "FluLaval", "Afluria"



"Sinovac", "Sputnik"



Base

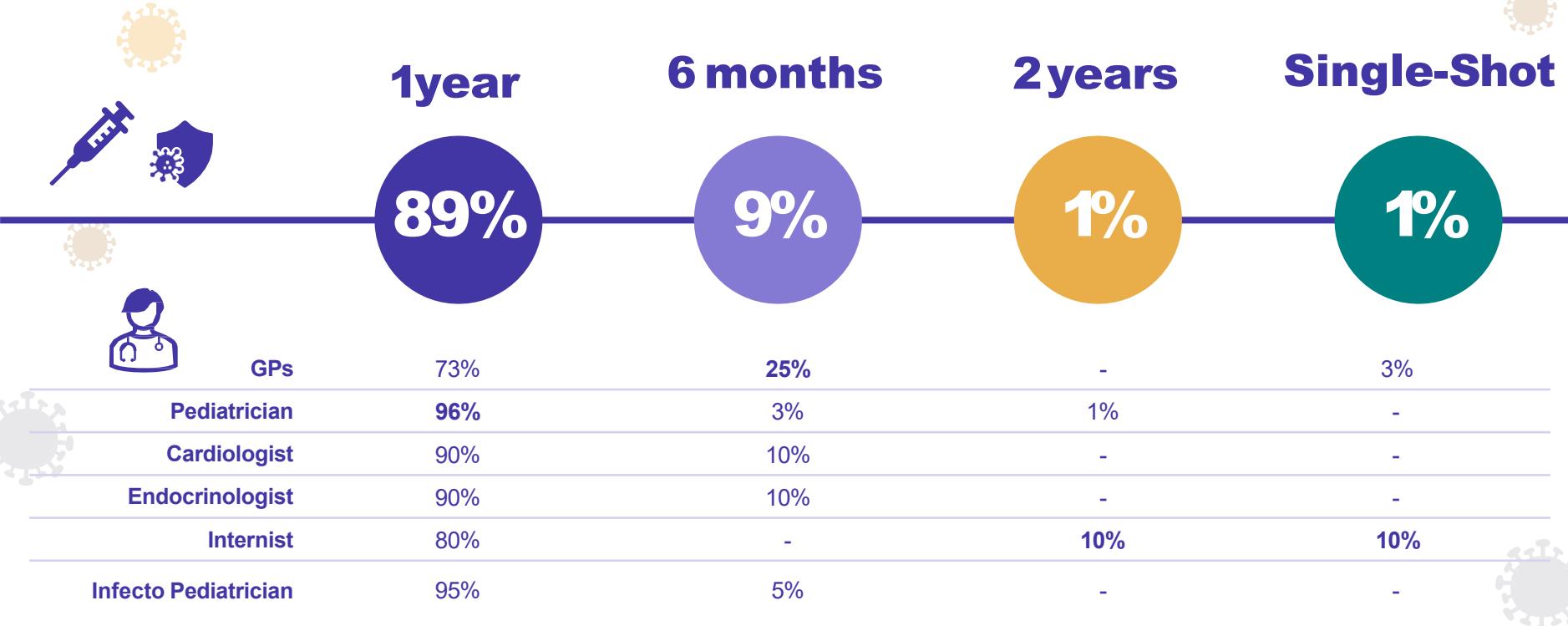
n = 185

Multiplicity: 1.6

P4a. What flu vaccine do you know or have heard of, even if you have never prescribed or administered it? P4b. Within your clinical practice in the private sector, do you know, or have you heard of influenza vaccines, even if you have never prescribed or administered them? P5. What brand do you prefer for the flu vaccine?

Flu vaccine booster time

The booster recommended by physicians is every year, while internists and GPs, sometimes even consider a single shot.



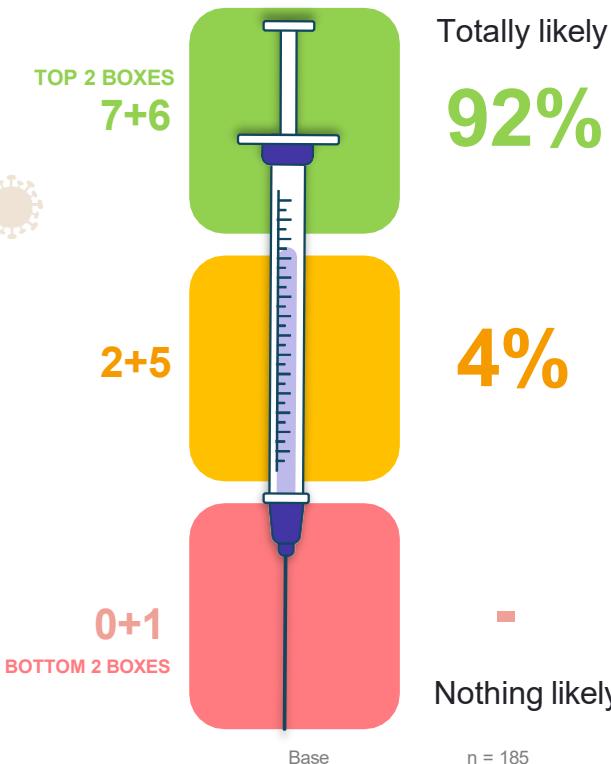
Base

n = 185

P7. How often do you think a patient should be given a booster of the influenza vaccine?

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Flu vaccine recommendation



The physicians will recommend the flu vaccine, the main reason is because protect health.



Totally likely		T2B
Base	Multiplicity	178
Protect health		1.8
Few side effects		48%
Decreases mortality		43%
Safety / Reliable		16%
For patients at risk or with comorbidities		7%
		5%

Px for whom the flu vaccine is recommended

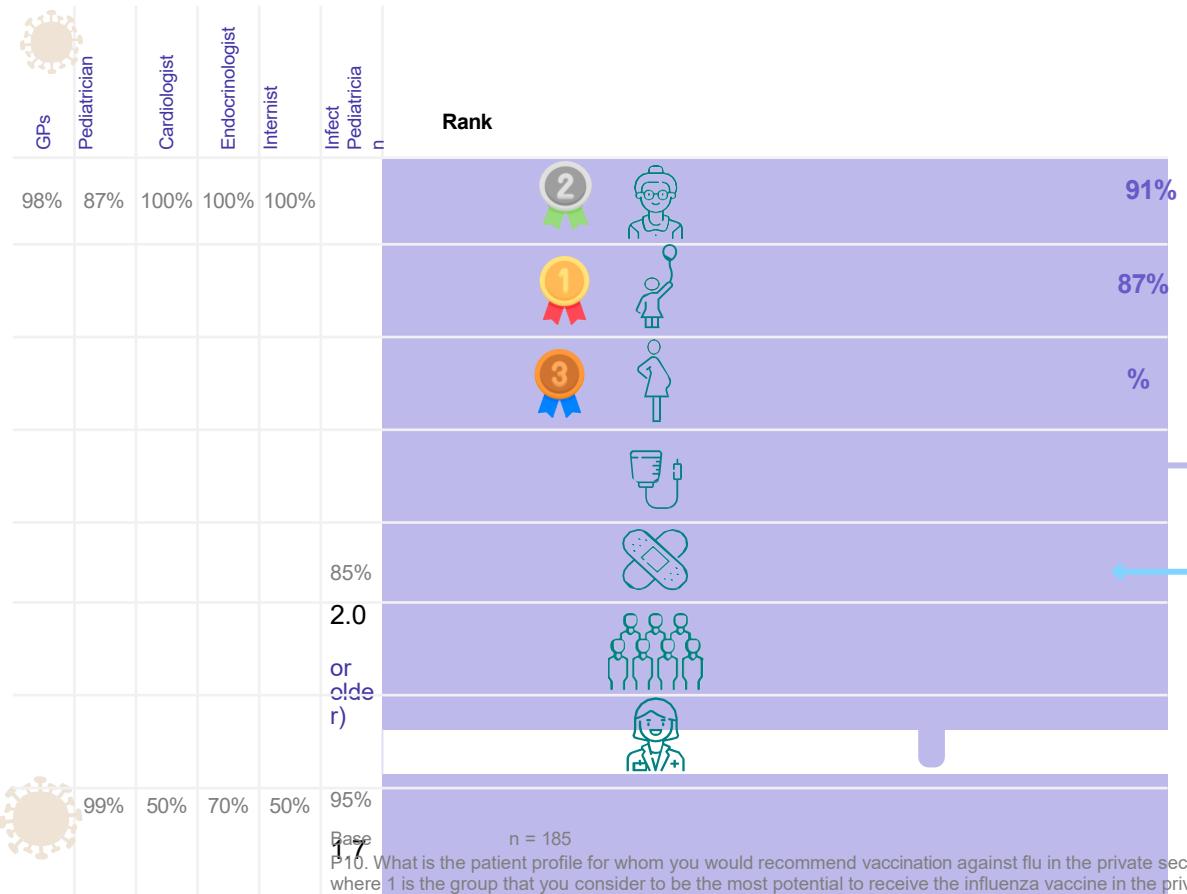
Px per month	Total	GPs	Pediatrician	Cardio	Endo	Internist	Infect Pediatrician
Base	110	146	102	127	110	103	67

P8. Within your clinical practice in the private sector, how likely are you to recommend influenza vaccination to your patients? Please use a scale of 0 to 7 where 0 is not at all likely and 7 is highly likely. P8a. Why would the influenza vaccine have this level of recommendation? P9. Considering the patients you see per month in the private sector, how many patients would you recommend vaccination against influenza?

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Patient type

The physicians recommend the flu vaccine to seniors (60 years or older) and children under 5 years.

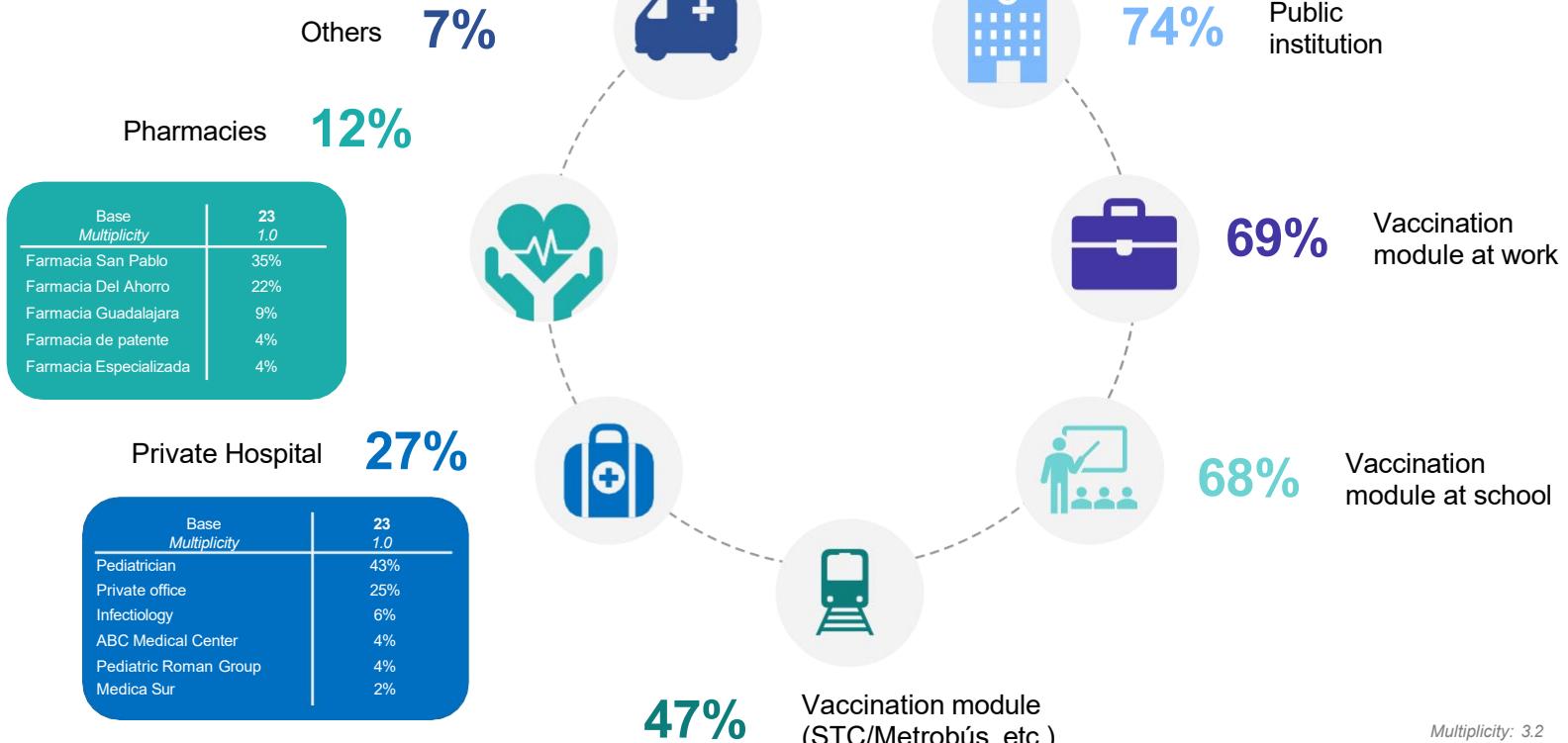


Comorbidity	Base Multiplicity	
Diabetes	178 1.8	43%
Asthma		23%
Hypertension		18%
Cardiovascular problems		10%
Obesity		9%

Condition	Base Multiplicity	
Asthma	64 1.2	22%
Diabetes		17%
COPD		9%
Hypertension		9%
Immunodeficiency		9%
Cancer		8%
Cardiovascular problems		6%

Vaccination place

The public institutions is where people consider apply the flu vaccine, the vaccination modules stands out.



Base

n = 185

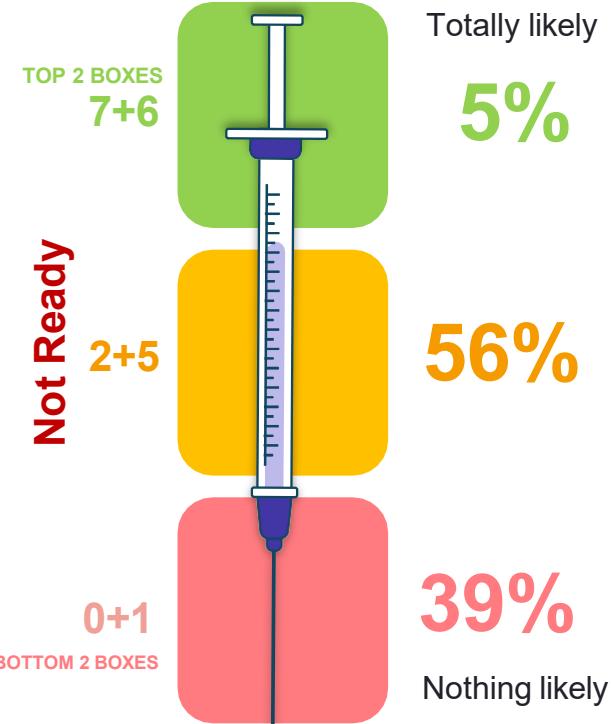
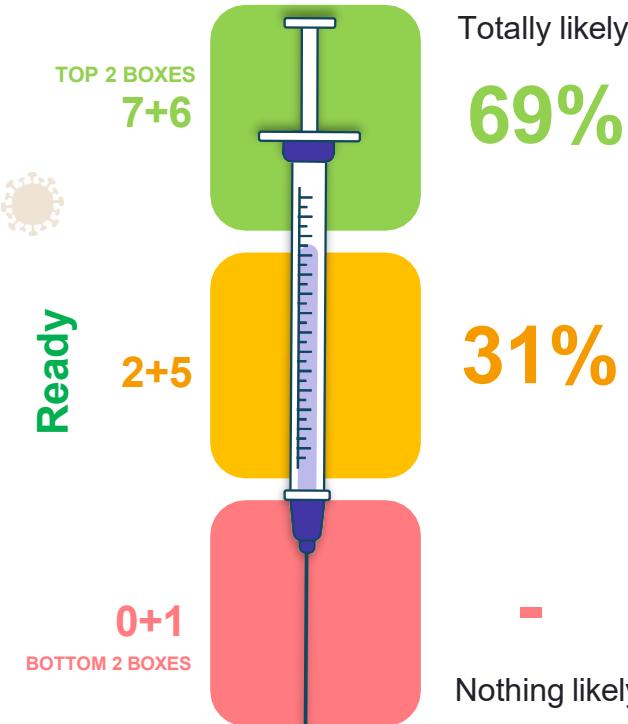
P12. Where do you think your patients like to have this flu vaccine available?

Multiplicity: 3.2

Flu vaccine willing to apply



The physicians consider the Px is ready to apply the vaccine, a minimum percentage it's not likely to apply because of the price or side effects mostly.



Base n = 185

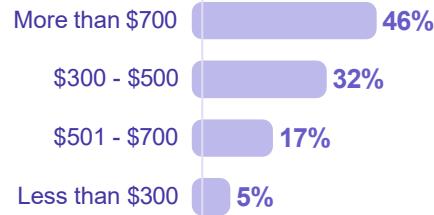
P13. How likely is it that your patients in the private sector would be willing to get the flu vaccine? Please use a scale from 0 to 7 where 0 is not at all likely and 7 is highly likely. ? P13a. For what reason did you qualify with the willingness to apply for the flu vaccine?

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Price & acquisition

\$766.00 MXN

Average price



Base

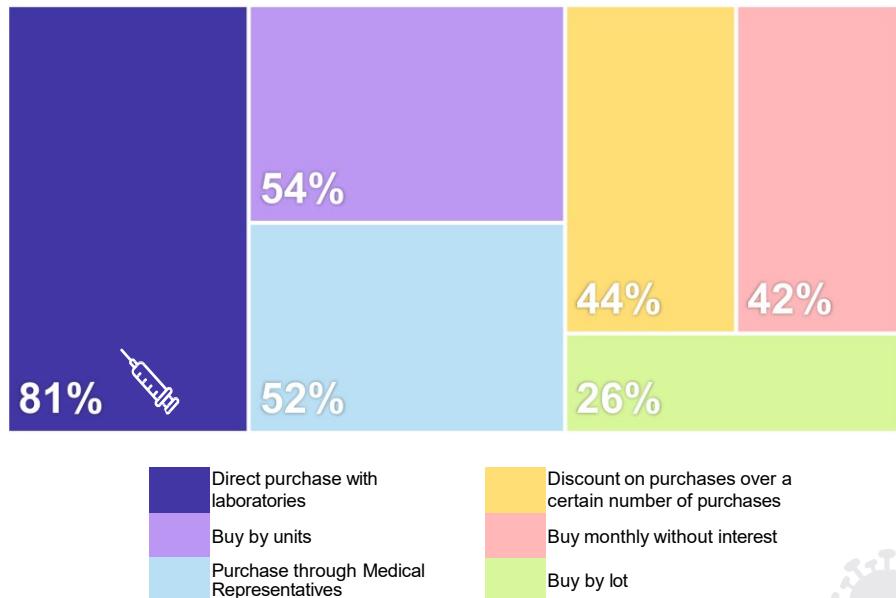
n = 185

P15. Within your clinical practice in the private sector, at what price do you think your patients feel comfortable acquiring the flu vaccine? P16. What do you think would be a good strategy where you can get the vaccines for you to administer and offer to groups that are willing to purchase them in the private sector?



The average price per dose of vaccine that HCPs consider Px are willing to pay is more than \$700, as well as prefer direct purchase with manufacturer laboratory and discounts.

How HCPs prefer to get vaccines and offer them to groups



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How HCPs prefer to get vaccines and offer them to groups

	Total	GPs	Pediatrician	Cardiologist	Endocrinologist	Internist	Infect Pediatrician
n =	185	40	95	10	10	10	20
Direct purchase with laboratories	81%	78%	85%	70%	90%	60%	75%
Buy by units	54%	70%	51%	30%	60%	10%	65%
Purchase through Medical Representatives	52%	75%	44%	30%	30%	80%	55%
Discount on purchases over a certain number of purchases	44%	40%	54%	20%	20%	40%	35%
Buy monthly without interest	42%	70%	38%	30%	40%	30%	40%
Buy by lot	26%	30%	24%	20%	30%	30%	25%
Purchases with distributors	2%	-	2%	-	-	-	5%
Vaccination campaigns	1%	3%	-	-	-	-	-
Discounts to doctors	1%	3%	-	-	-	-	-
Accessible prices	1%	-	1%	-	-	-	-
Deliveries to the office	1%	-	-	-	-	-	5%
Guarantee existence before the season	1%	-	1%	-	-	-	-
Do not sell to companies	1%	3%	-	-	-	-	-
Multiplicity	3.0	3.7	2.9	2.0	2.7	2.5	3.0

Base

n = 185

P16. What do you think would be a good strategy where you can get the vaccines for you to administer and offer to groups that are willing to purchase them in the private sector?



03

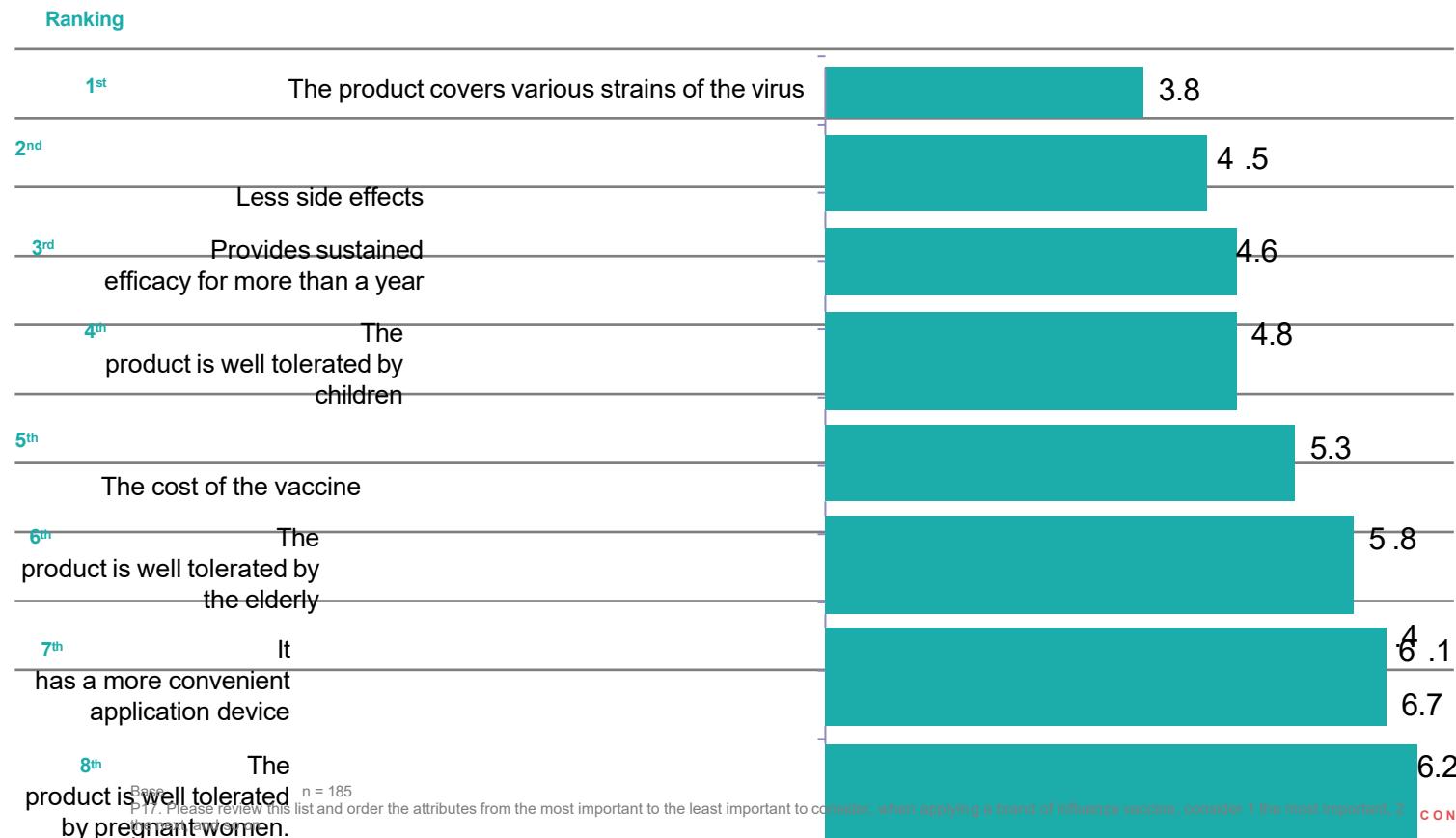
Drivers

Vaccine recommendation

Stated Importance



The product covers various strains of the virus response is the main driver to decide on a specific flu vaccine.

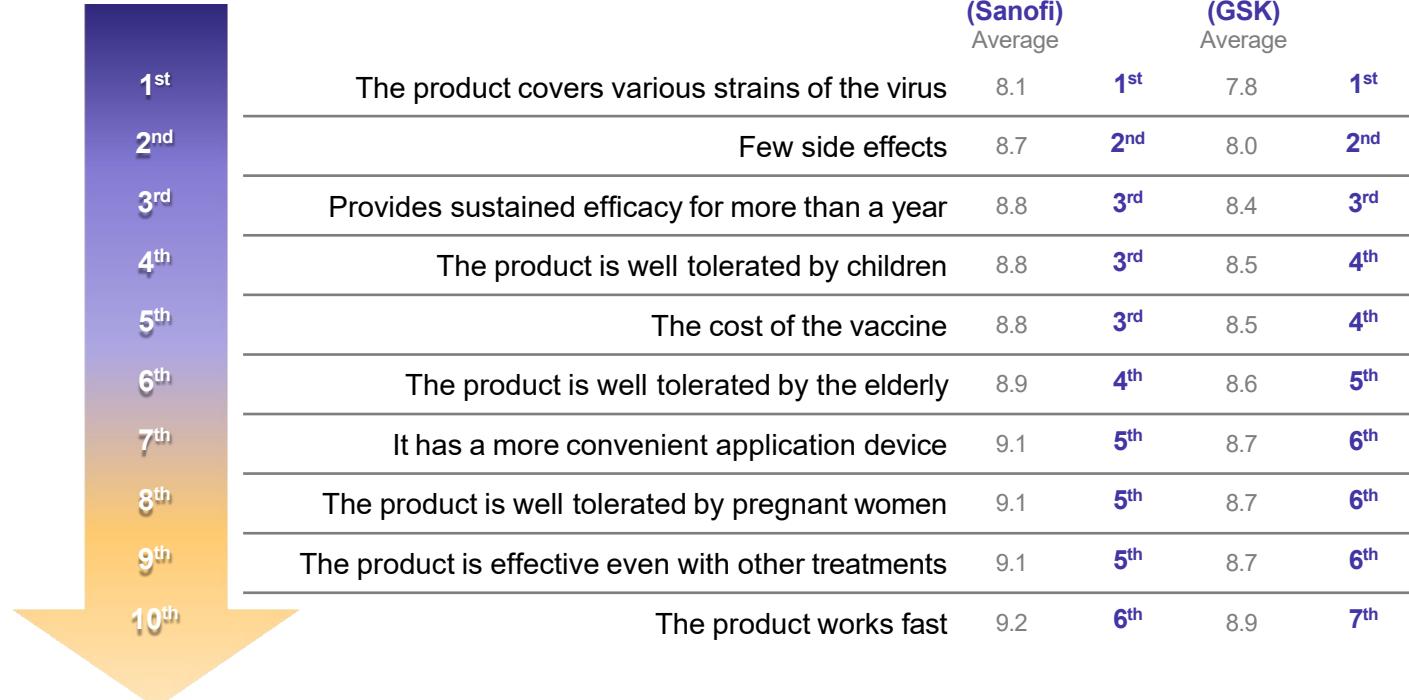


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Ideal brand attributes



When choosing the brand for the flu vaccine, the most important aspect is the product covers various strains of the virus, followed by a few side effects.

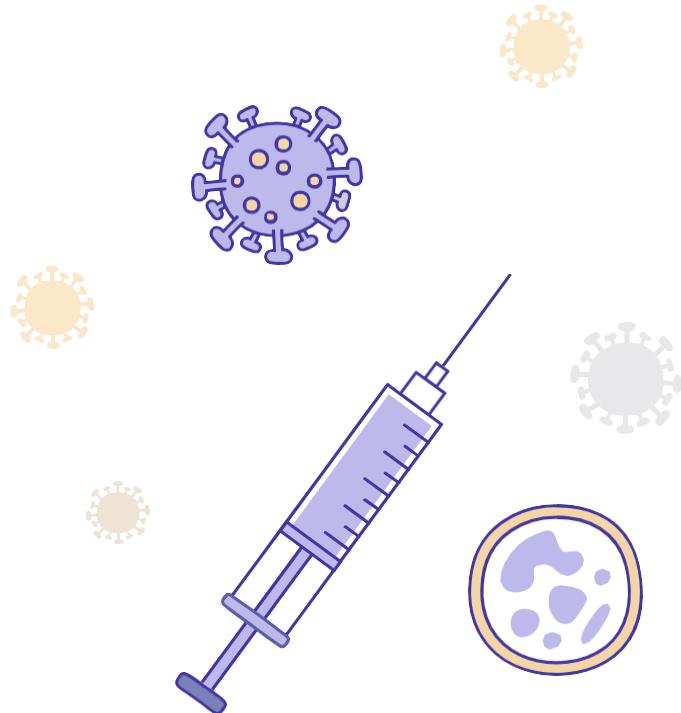


Base

n = 185

P18. Now we are going to use the following scale from 1 to 5 10 where 1 means that the performance of the product is "Poor" and 5 10 that it is "Excellent" and you can use any number in between. Please tell me, how would you rate each of the following products according to the following sentences?

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04

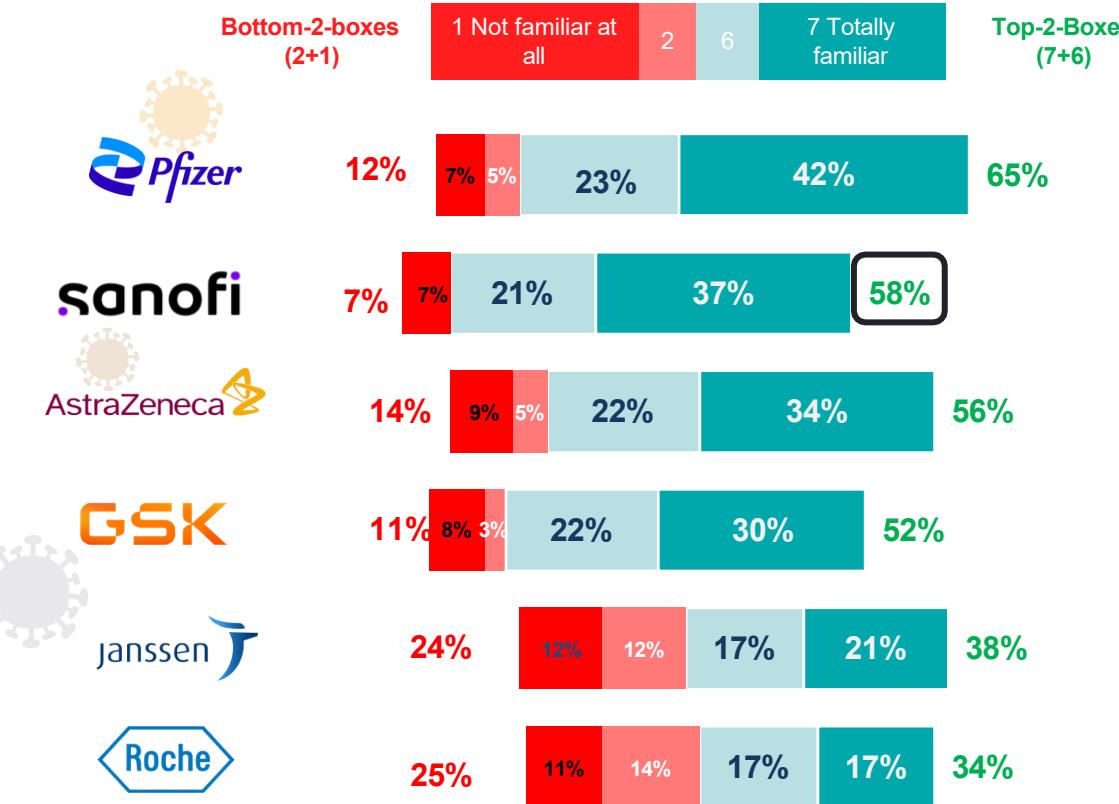
Laboratories

Communication with
laboratories



Familiarity

Familiarity of Pfizer is the highest, specially among GPs but in general there is an opportunity to increase familiarity among Pediatricians



Base

n = 185

*Small base

F10. Thinking about the application of vaccines, how familiar are you with the visits and/or calls from the representatives of the following companies? We are going to use the following scale from 1 to 7, where 1 means "Not at all familiar" and 7 "Totally familiar" and you can use any number in between.

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Laboratories visit



Visit last 3 months



Base

n = 185

P19. In the last 3 months, which laboratories have contacted you to talk about vaccines? Consider any type of face-to-face or remote contact. P20. How many times have you been visited for vaccines by the following laboratories in the last three months? P20a. Which of them is about the flu vaccine?

Sanofi is the laboratory with the highest percentage of visits; however, Lilly is the first one of visit contacts for vaccines, meanwhile, Sanofi is the first specifically in the flu vaccine.



Times contacts for Vaccines

1.9

2.0

2.1

2.2

2.1

2.3

2.6

-

-

Contacts for Flu Vaccines

52%

37%

9%

13%

4%

3%

2%

*None

22%

Multiplicity: 1.4



Reasons for most valuable

sanofi

GSK

sanofi

AstraZeneca



Janssen
PHARMACEUTICAL COMPANIES OF
Johnson & Johnson



Pfizer



%

	Total	GSK	Sanofi	Astra Zeneca	Bayer	J&J	Pfizer	MSD
n = 185	185	35	75	16	4	5	35	1
Medical Representative Visits (NET)	25	43	24	19	50	-	17	-
The representative visits me	22	43	17	19	50	-	14	-
The representative is trained	3	-	7	-	-	-	3	-
Updated information (NET)	24	37	21	19	-	20	31	-
has good information	18	31	15	19	-	-	23	-
Has updated information	6	6	7	-	-	20	9	-
Trust (NET)	16	14	21	13	-	-	20	-
has prestige	5	9	4	6	-	-	9	-
Has experience	3	3	5	-	-	-	3	-
Is trustworthy	3	3	3	-	-	-	6	-
It is a leader	2	-	5	-	-	-	-	-
Is your vaccine provider	1	-	3	-	-	-	-	-
It's a good lab	1	-	3	-	-	-	-	-
It has approved vaccines for the pediatric population	1	-	-	-	-	-	3	-
It is the most used brand	1	3	-	-	-	-	-	-
They are the ones who are interested in the private sector	1	-	-	6	-	-	-	-
Continuing Medical Education (CME) (NET)	13	14	13	13	-	-	17	100
Has continuing medical education	4	3	5	6	-	-	3	100
Invite to congresses	4	3	7	-	-	-	3	-
Invite to talks	3	6	3	-	-	-	6	-
Give support to doctors	2	-	-	6	-	-	6	-
have webinars	1	3	-	-	-	-	-	-
Scientific Studies (NET)	11	9	12	19	25	20	9	-
Has scientific studies	10	9	11	19	25	20	9	-
Gives bibliography/literature	1	-	1	-	-	-	-	-
Service (NET)	9	9	9	-	-	20	14	-
He is on the lookout for the doctor	4	3	5	-	-	20	6	-
has more promotions	1	3	-	-	-	-	3	-
They give printed information	1	-	3	-	-	-	-	-
Contact me by phone	1	-	-	-	-	-	3	-
It has good service	1	-	1	-	-	-	-	-
solve doubts	1	-	-	-	-	-	3	-
They give advice	1	3	-	-	-	-	-	-
Multiplicity	1.4	1.7	1.4	1.1	1.0	1.0	1.4	1.0

Base

n = 185

P22. Why do you consider that it is the laboratory that provides you with the greatest value on the subject of vaccines?

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Contact Channel

Future visits about vaccines

Currently do not visit



Base n = 185

P23. Which of the following laboratories would you like to be contacted to discuss the topic of vaccines? P24. How would you like to be contacted or receive information about vaccinations, including the flu vaccine? P25. What type of information would you like to receive from the laboratory regarding the subject of vaccines? P25a. How often would you like to receive this information about vaccinations, including the flu vaccine?

E-mail visits and F2F are highly preferred by HCPs to be contacted for the pharma industry.

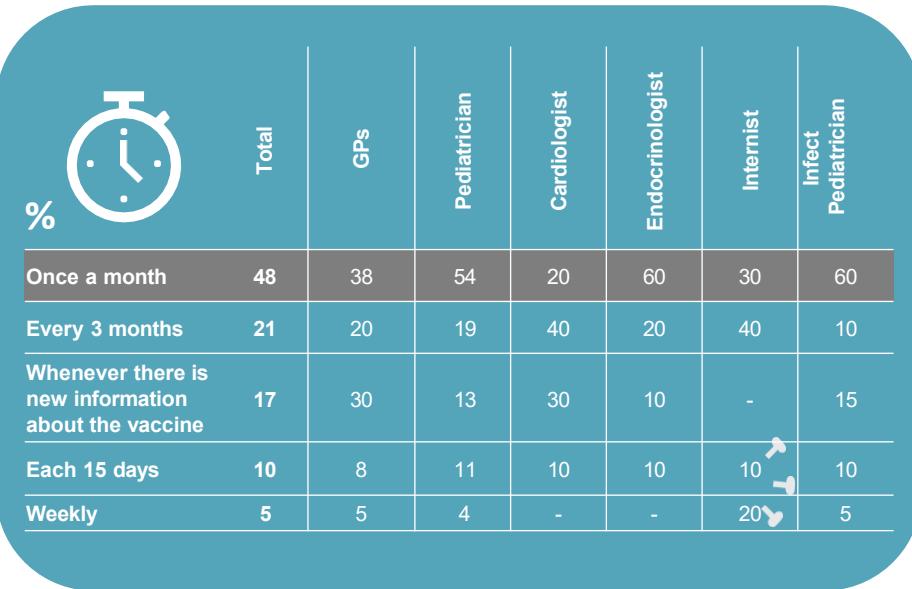
Preferred Channel for Vaccines information %

	Total	GPS	Pediatrician	Cardiologist	Endocrinologist	Internist	Infect Pediatrician
n =	185	40	95	10	10	10	20
Email	67	48	71	60	70	70	85
In-person visit of the representative	56	55	60	40	50	70	40
WhatsApp	41	28	54	20	10	20	40
Virtual visits (video calls)	27	58	23	-	10	20	10
SMS	11	15	10	10	20	10	10
Phone call	9	8	12	10	-	10	5
Conferences	2	3	1	-	-	-	5
Multiplicity	2	2	2	2	2	2	2

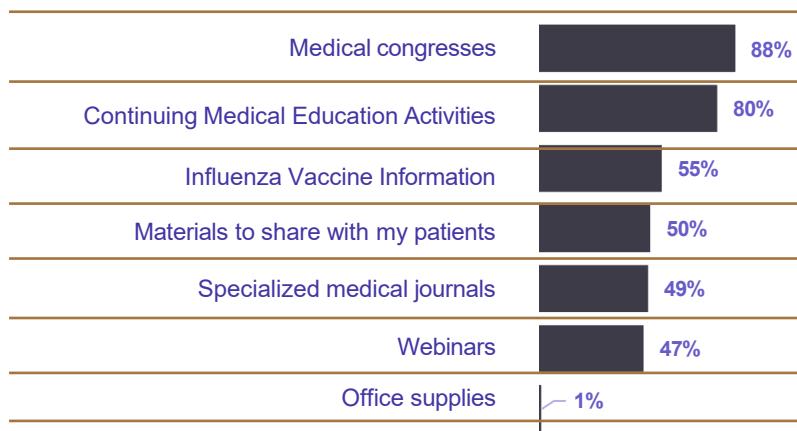
CONFIDENTIAL

Contact Channel

Congresses and CME Activities are the main options for HCPs to be updated about vaccines. HCPs prefer to be contacted once a month unless there is new and relevant information about the vaccine.



Preferred Channel for CME



Multiplicity: 3.6

Base

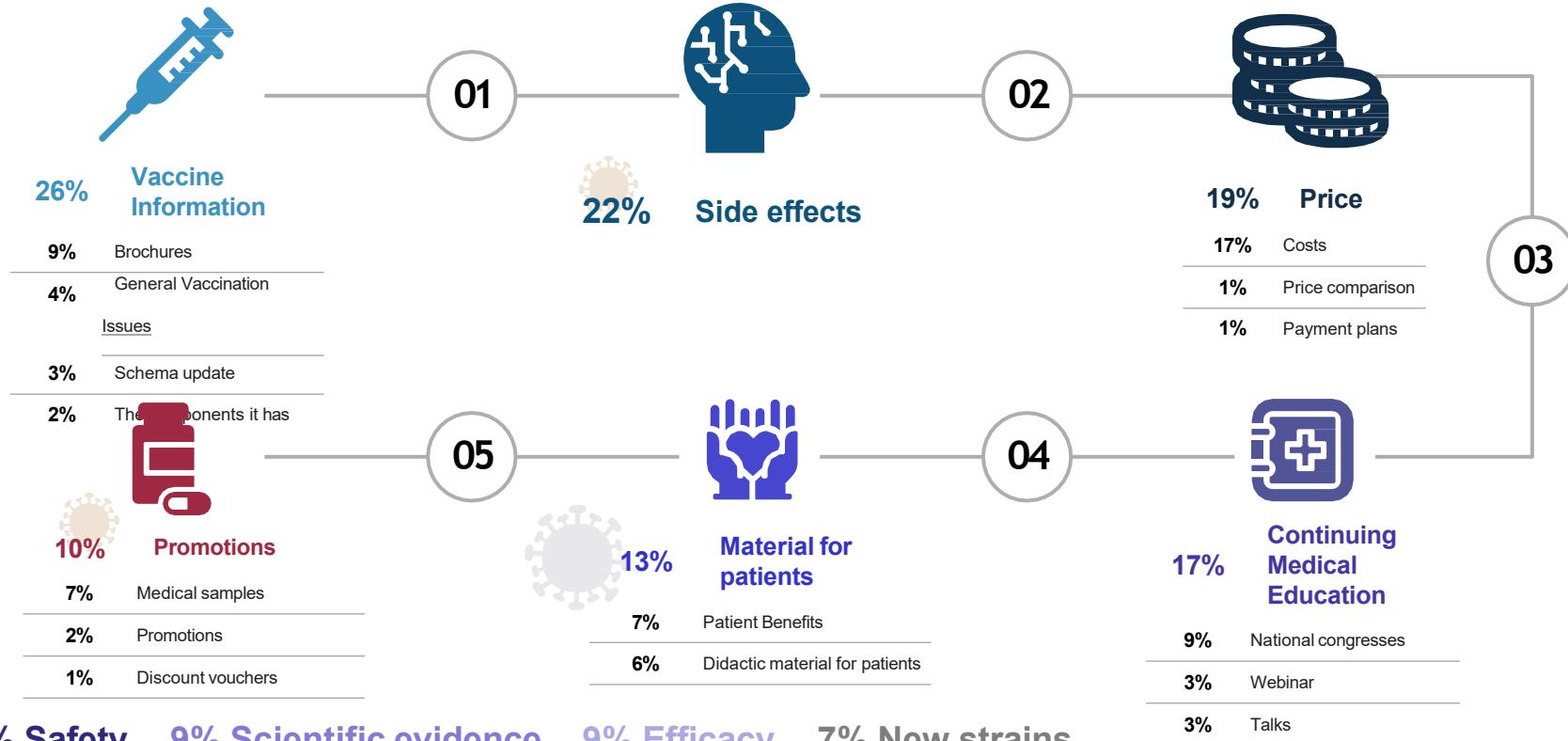
n = 185

P23. Which of the following laboratories would you like to be contacted to discuss the topic of vaccines? P24. How would you like to be contacted or receive information about vaccinations, including the flu vaccine? P25. What type of information would you like to receive from the laboratory regarding the subject of vaccines? P25a. How often would you like to receive this information about vaccinations, including the flu vaccine?

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Vaccine information

The main aspects that doctors consider important are that pharmacists share information about general problems with the vaccine or components. The side effects and price are important too.



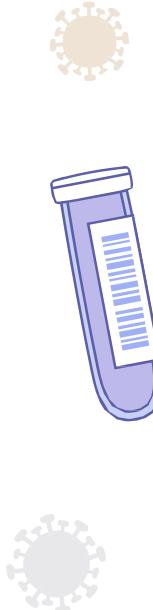
Base n = 185

P26. What things would you like to see pharmaceutical companies promote or provide when providing information on an existing flu vaccine? Consider activities or aspects that add value to your clinical practice.

Multiplicity: 1.4

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General Population

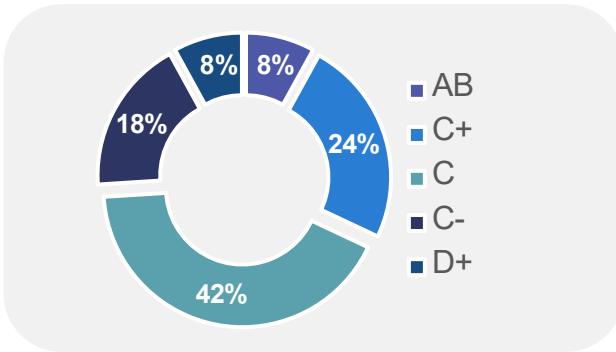


Who was interviewed?

Gender



SLE



Average Age 41 y.o.

Mothers of children from 6 to 59 months	33 y.o.
Pregnant women	30 y.o.
Population between 5 and 59 years with some comorbidity	41 y.o.
Population between 5 and 59 years without comorbidities	36 y.o.
Adults over 60	63 y.o.

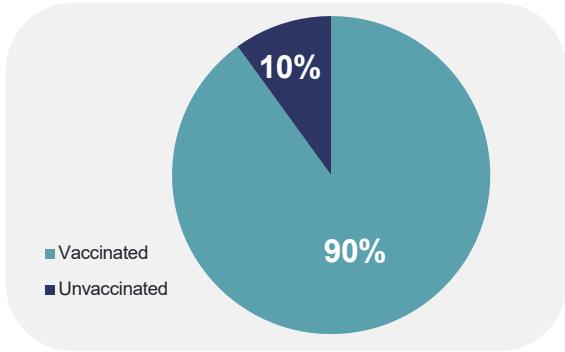
Base

n = 153

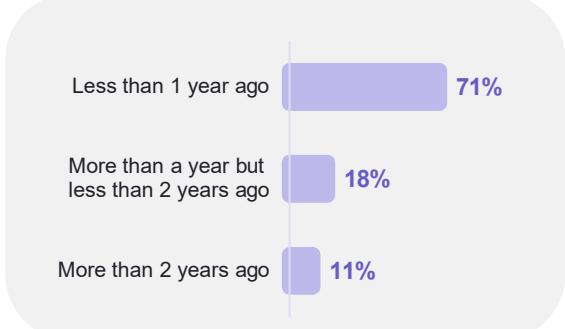
F1. Gender, NSE, F3. Age, F8. Have you had a flu shot? F9. How long ago were you vaccinated against flu?



Flu vaccine



How long ago were you vaccinated?



Unvaccinated

The main reason for Px to be unvaccinated is because of medical recommendations or fear of side effects, so what could trigger to get vaccinated is everyone they live with at home gets vaccinated or a pandemic

Reasons %



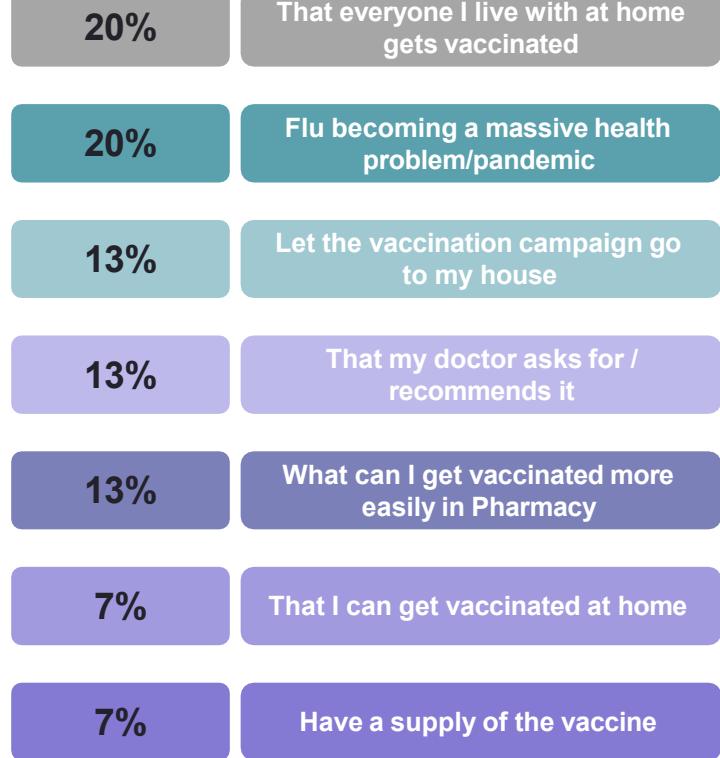
	Total	Mothers of children from 6 to 59 months	Population between 5 and 59 years with some comorbidity	Population between 5 and 59 years without comorbidities	Pregnant women	Adults over 60
n =	15	5	4	2	2	2
The doctor did not recommend it	27	20	-	-	100	50
Fear of side effects	27	20	50	50	-	-
Procrastination	20	40	-	50	-	-
I don't know where to get vaccinated	13	20	25	-	-	-
I got vaccinated against COVID and protects me for both viruses	7	20	-	-	-	-
Vaccine shortage in health center	7	-	25	-	-	-
Not trustworthy	7	-	-	-	-	50
Multiplicity	1.1	1.2	1.0	1.0	1.0	1.0

Base

n = 153

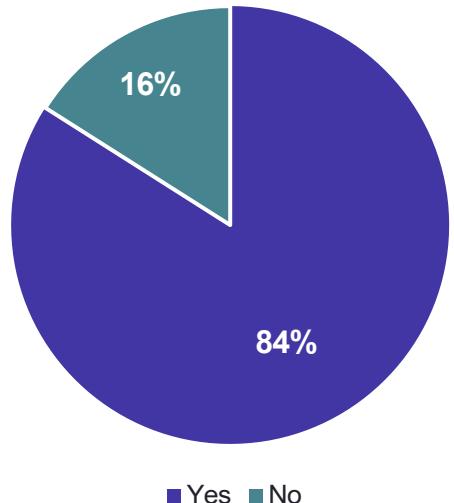
F10. Why have you not been vaccinated against the flu? F11. What would have to happen for you to be convinced to get a flu shot? P29. Why hadn't you gotten the flu shot?

Trigger to get vaccinated against the flu

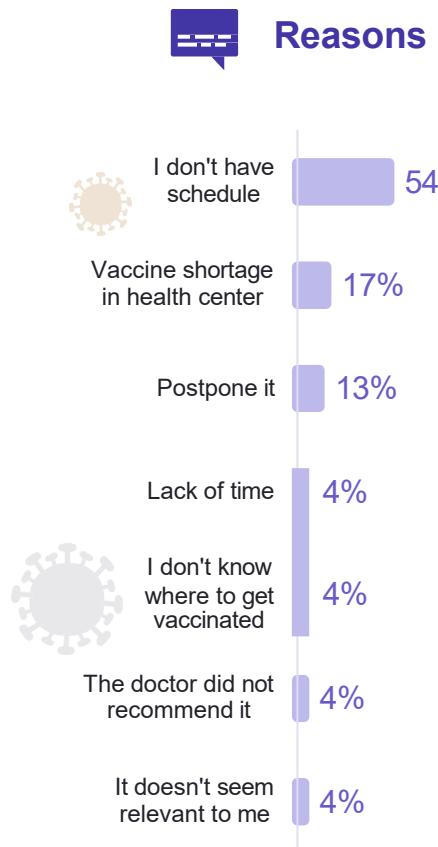


Vaccines Schedule

Update on vaccines Schedule



The reasons for not being up to date with the vaccination card is the fact of not having it, followed by the shortage of vaccines in the health center.



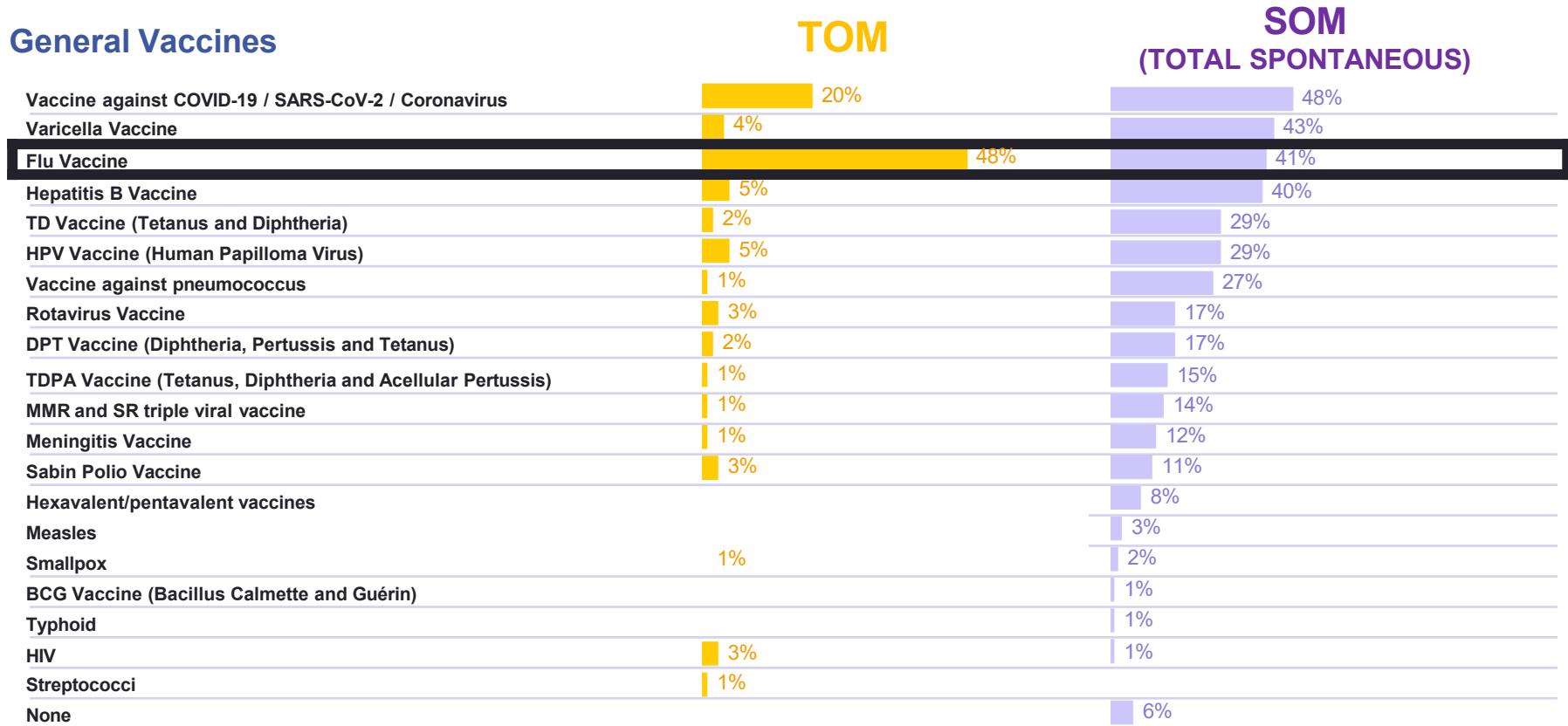
	Mothers of children from 6 to 59 months	Population with some comorbidity	Population without comorbidities	Pregnant women	Adults over 60
4 1.0	4 1.0	8 1.0	4 1.0	4 1.0	4 1.0
20%	-	-	100%	50%	
20%	50%	50%	-	-	
40%	-	50%	-	-	
20%	25%	-	-	-	
20%	-	-	-	-	
-	25%	-	-	-	
-	-	-	-	-	50%

P1. Are you up to date on your vaccination record? P2. Why is your vaccination record not up to date?

TOM & SOM

General Vaccines

The vaccine against COVID is the first in the Px minds followed by varicella and then the flu vaccine in third place.



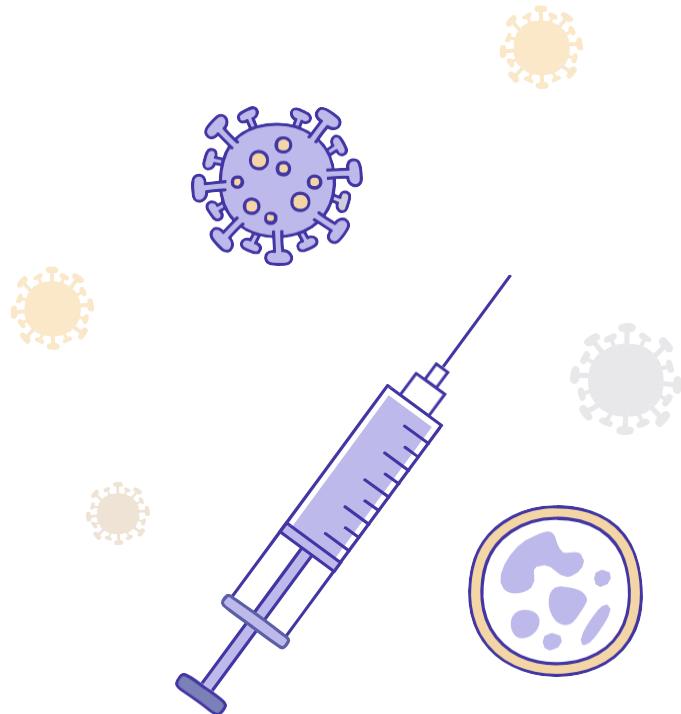
Base

n = 153

P3. Could you tell me what vaccinations you know in general, even if you have not applied them? Other?

Multiplicity: 3.6

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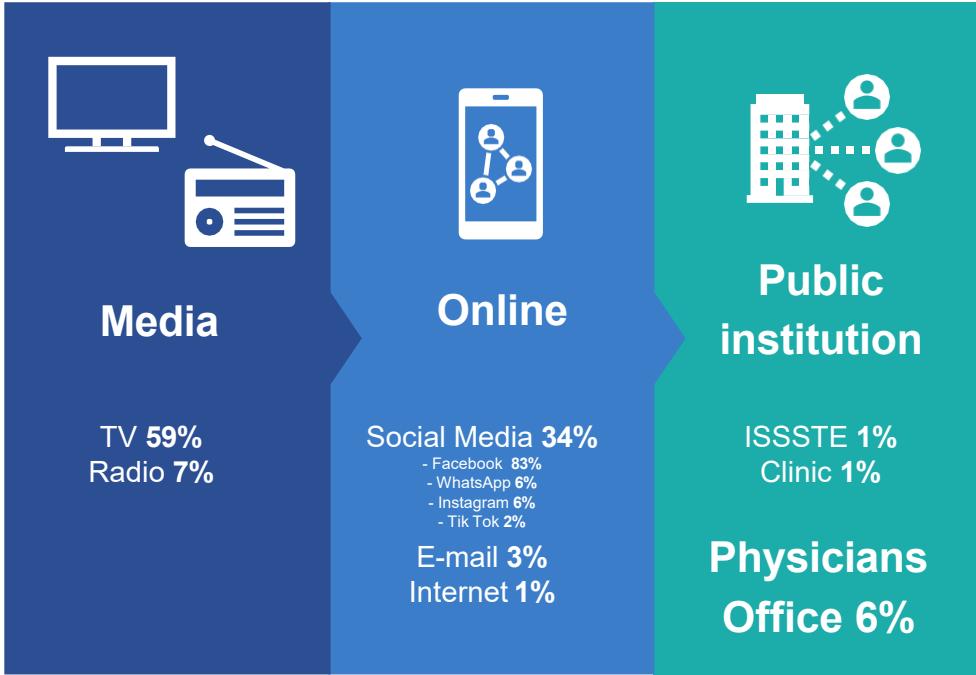
01

Vaccines

General knowledge

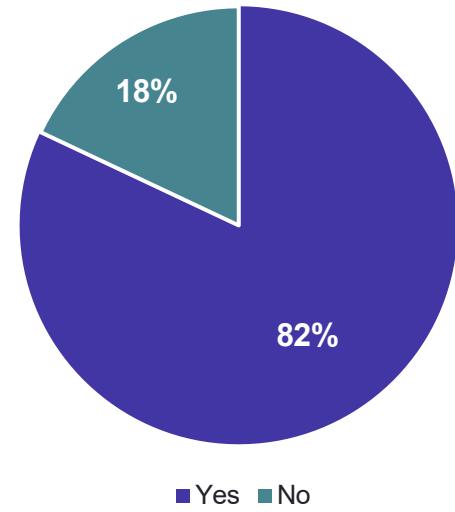


Where did people hear about the vaccine?



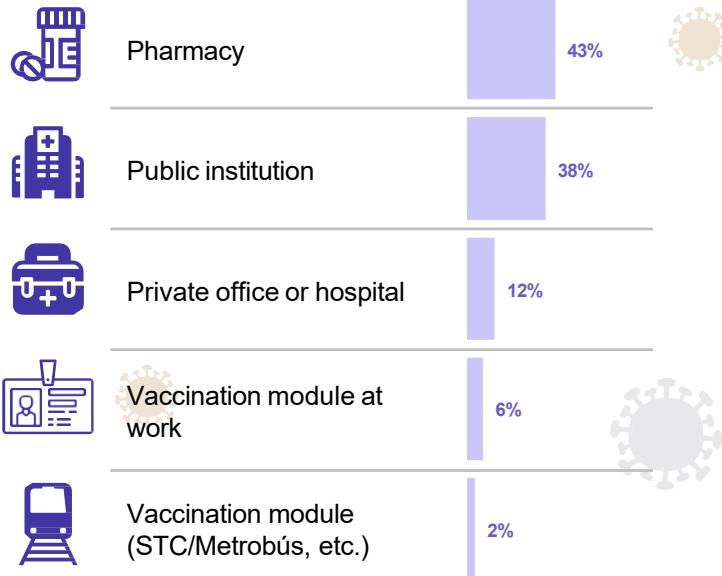
8 of 10 Px don't know where to get vaccinated, meanwhile, traditional massive media is still the preferred channel to know about the vaccine, however, social media are making their way as a communication channel.

Did you know where to get vaccinated?



Vaccination trust place

General Population



Pharmacy is the preferred place to get vaccinated in general, however, mothers of children from 6 to 59 months and pregnant women choose it first. Adults over 60 trust a public institution.

	Mothers of children from 6 to 59 months	Population with some comorbidity	Population without comorbidities	Pregnant women	Adults over 60
Pharmacy	58%	40%	19%	63%	39%
Public institution	23%	44%	44%	29%	48%
Private office or hospital	12%	12%	26%	4%	4%
Vaccination module at work	8%	4%	7%	-	9%
Vaccination module (STC/Metrobús, etc.)	-	-	4%	4%	-

Base

n = 153

P6. Could you tell me which institution or place would you trust to apply vaccines? Either for you or for your family.

Multiplicity: 1.3

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Reasons to choose vaccination place

Public institutions are preferred because of the price of the vaccine for adults over 60.



Public Institution %

	Total	Mothers of children from 6 to 59 months	Population with some comorbidities	Population without comorbidities	Pregnant women	Adults over 60
n =	83	14	18	20	16	15
Price (Net)	34	36	22	15	50	53
Service	27	50	17	20	19	33
I't's clean	1	-	-	5	-	-
Closeness	25	50	17	15	19	33
Follow-up	22	21	22	20	19	27
Vaccine quality	19	21	28	35	6	-
Convenience (Net)	19	21	22	20	25	7
Vaccine availability	18	14	22	20	25	7
I arrive without an appointment	12	7	17	15	6	13
Less waiting time	11	29	6	10	6	7
I already know the staff	7	14	11	-	-	13
Multiplicity	1.7	2.3	1.6	1.7	1.4	1.7

Vaccination module (STC/Metrobús, etc.) %

	Total	Mothers of children from 6 to 59 months	Population with some comorbidities	Population without comorbidities	Pregnant women	Adults over 60
n =	18	2	3	5	3	5
Price	44	50	33	40	67	40
Service	39	100	67	-	-	60
Closeness	39	100	67	-	-	60
Vaccine quality	17	-	33	20	33	-
Good customer service	17	-	-	20	67	-
I arrive without an appointment	17	-	-	20	33	20
Less waiting time	11	-	33	-	-	20
Convenience (net)	11	-	33	20	-	-
Vaccine availability	11	-	33	20	-	-
I already know the staff	6	-	-	-	33	-
Advertising	6	-	33	-	-	-
It's free	6	-	-	20	-	-
Multiplicity	1.7	1.5	2.3	1.4	2.3	1.4

Vaccination module at work %

	Total	Mothers of children from 6 to 59 months	Population with some comorbidities	Population without comorbidities	Pregnant women	Adults over 60
n =	23	7	6	5	3	2
Service	30	57	33	-	33	-
Closeness	30	57	33	-	33	-
Vaccine quality	30	29	33	40	-	50
Less waiting time	26	43	-	-	67	50
Price	26	43	17	20	-	50
I arrive without an appointment	26	-	33	60	33	-
Convenience (net)	17	29	-	40	-	-
Vaccine availability	17	29	-	40	-	-
Follow-up	13	-	17	20	-	50
Good customer service	4	14	-	-	-	-
I already know the staff	4	14	-	-	-	-
It is safe	4	-	-	20	-	-
Multiplicity	1.8	2.3	1.3	2.0	1.3	2.0

Reasons to choose vaccination place

Pharmacy is the best percentage of service. Mothers of children from 6 to 59 months and high-risk populations preferred it.



	Pharmacy %					
	Total	Mothers of children from 6 to 59 months	Population with some comorbidity	Population without comorbidities	Pregnant women	Adults over 60
n =	82	20	12	14	20	16
Service Closeness	51	60	42	57	45	50
Vaccine quality	50	60	42	50	45	50
Convenience (net)	38	50	25	21	35	50
Vaccine availability	31	35	8	50	30	25
Less waiting time	27	20	50	36	25	13
Good customer service	24	25	17	57	5	25
Price	17	25	25	-	20	13
I arrive without an appointment	13	15	-	14	25	6
It is safe	7	-	8	7	10	13
I already know the staff	5	-	17	-	10	-
Advertising	1	-	-	7	-	-
Follow-up	1	5	-	-	-	-
Multiplicity	2.2	2.4	1.9	2.5	2.1	1.9

	Private office or hospital %					
	Total	Mothers of children from 6 to 59 months	Population with some comorbidity	Population without comorbidities	Pregnant women	Adults over 60
n =	40	8	8	12	7	5
Vaccine quality	53	63	25	50	57	80
Convenience (net)	45	50	25	67	43	20
Vaccine availability	45	50	25	67	43	20
Less waiting time	43	38	50	50	57	-
Good customer service	40	75	25	50	14	20
Service (net)	23	25	13	25	29	20
Closeness	23	25	13	25	29	20
Follow-up	13	-	-	25	29	-
I already know the staff	13	-	13	25	14	-
Price	10	13	-	8	14	20
I arrive without an appointment	10	25	13	-	-	20
It is safe	5	-	-	8	-	20
Advertising	3	-	-	8	-	-
Multiplicity	2.6	2.9	1.6	3.2	2.6	2.0

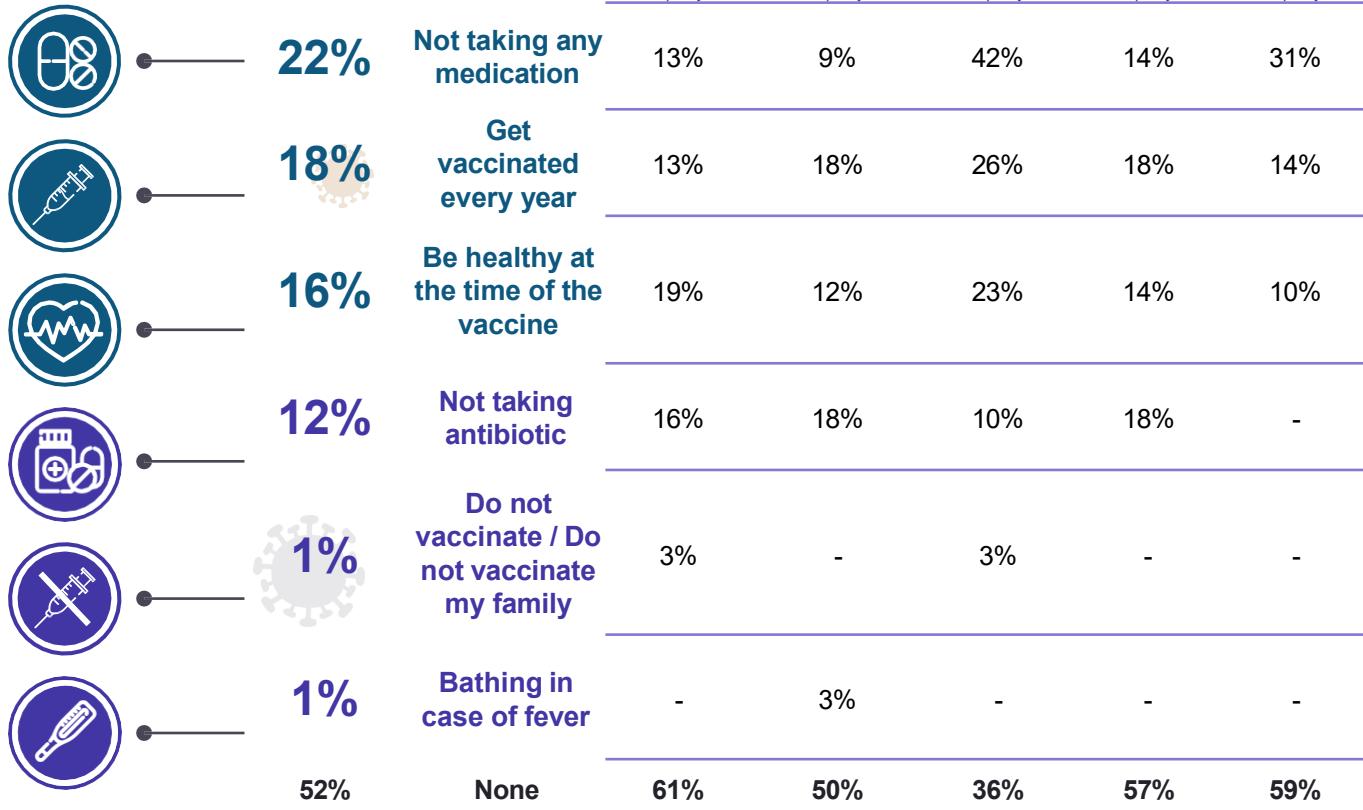
Base

n = 153

P6a. Since you selected as the place where you prefer to apply a vaccine, what are the reasons why you selected it?

Vaccine recommendations

Not taking any medication is the main medical recommendation after getting vaccinated. Px with comorbidity is the high percentage sector on this.



02

Flu vaccine

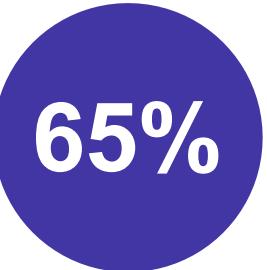
Knowledge



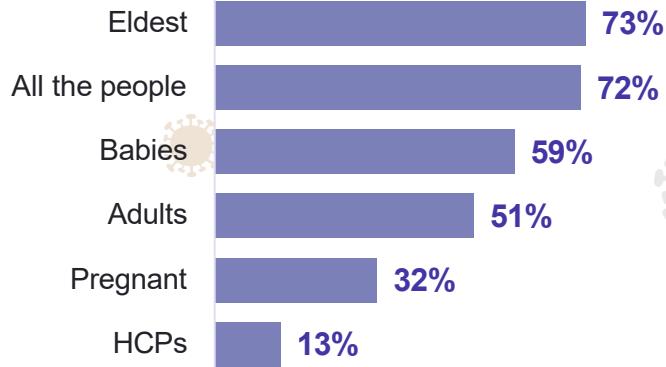
Who is the flu vaccine for?

6 of 10 Px associate the flu vaccine with elderly people and the frequency of the shot every year.

 Know about for whom is the flu vaccine



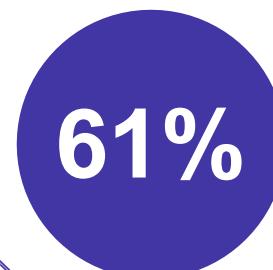
Base: 88
Multiplicity: 3.0



Frequency



Know about the frequency of flu vaccine

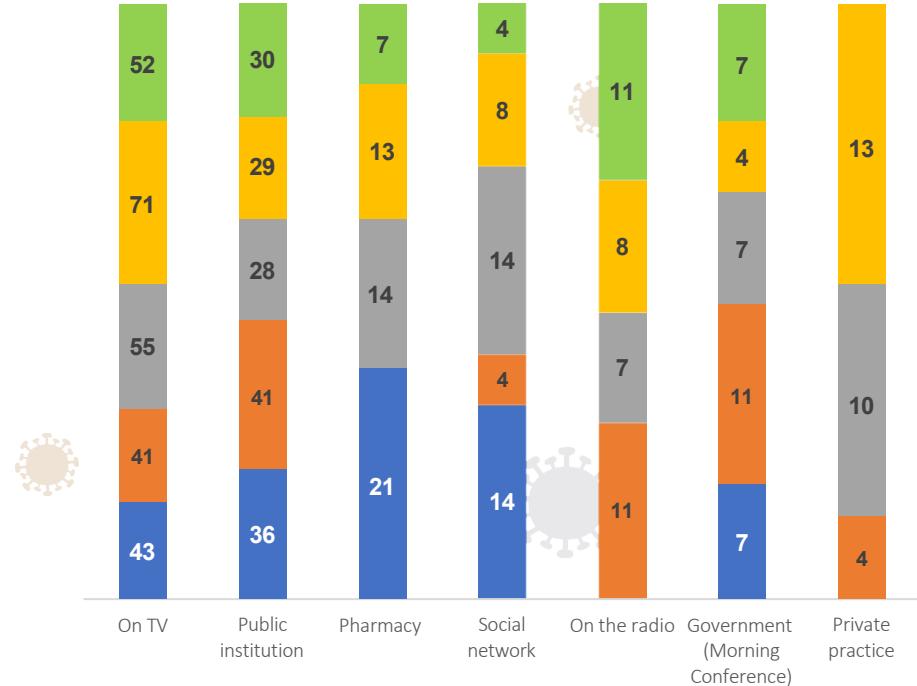


Base n = 153

P8. Speaking of the flu vaccine, do you know who it is recommended for? P9. For whom? P11. Do you know how many times or how often you should apply the influenza vaccine? P12. How often should you get the flu vaccine?

Where did people hear about the flu vaccine?

- Mothers of children from 6 to 59 months
- Population with some comorbidity
- Population without comorbidities
- Pregnant women
- Adults over 60



Base

n = 153

P10. How did you hear about the flu vaccine? P10a. Since you selected the place where you prefer to apply a vaccine, what are the reasons why you selected it?

TV is the main mass media channel to be informed about vaccines.

	Total	Mothers of children from 6 to 59 months	Population with some comorbidity	Population without comorbidity	Pregnant women	Adults over 60
n=	15	6	-	4	3	2
Less waiting time	47	67	-	75	-	-
Service	40	50	-	25	33	50
Closeness	40	50	-	25	33	50
Price	33	50	-	-	-	100
Convenience (net)	33	17	-	75	-	50
Vaccine availability	27	17	-	50	-	50
Vaccine quality	27	33	-	-	-	100
Good customer service	27	17	-	75	-	-
I arrived without an appointment	13	17	-	-	33	-
they follow me	13	17	-	-	-	50
Advertising	7	-	-	-	33	-
It is safe	7	-	-	25	-	-
To prevent disease	7	-	-	-	33	-
Multiplicity	2.5	2.7	-	2.8	1.3	3.5

Multiplicity: 1.5

CONFIDENTIAL

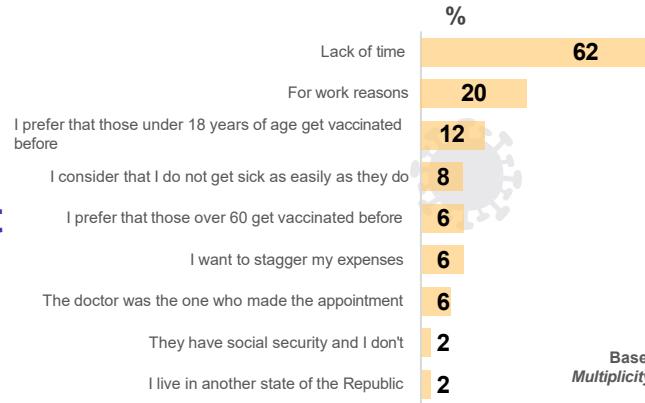
Who has vaccinated?

Have you or anyone in your family ever had a flu vaccine?



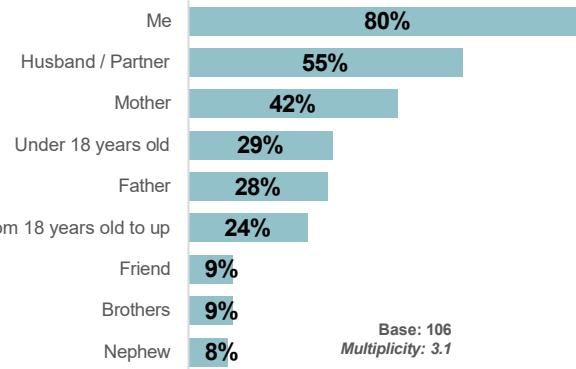
86%

46%
don't get vaccinated at the same time because...

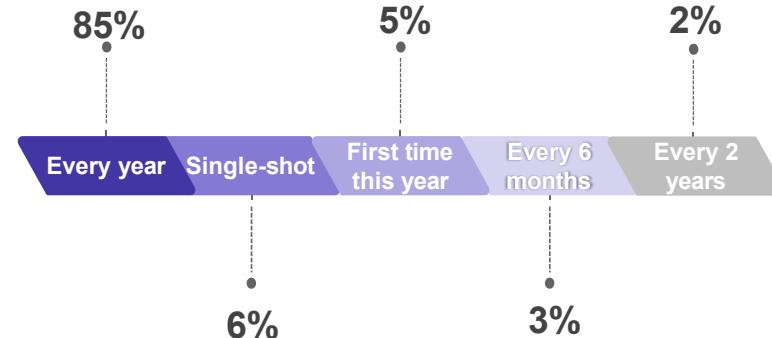


Pharmacy is the preferred place to get vaccinated in general, however, mothers of children from 6 to 59 months and pregnant women choose it first. Adults over 60 trust a public institution.

Who?



Frequency



Advertising campaign

The information about flu vaccine, reach 2 out of 10 people

39%

Avoid diseases / for health



9%

Avoid getting infected



9%

The places where the vaccination modules are located



17% Have seen or heard something related to the campaign



17%

You must get vaccinated in winter



9%

Applies every year



4%

It's free



n = 23
Multiplicity: 1.2

Base

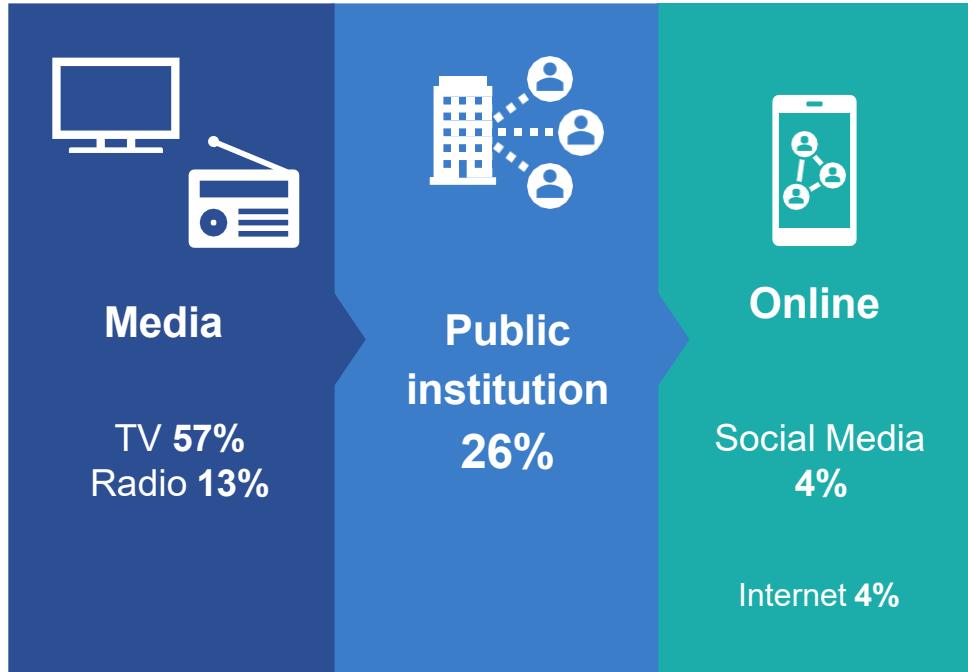
n = 153

P16. Have you seen or heard anything related to the current flu vaccination campaign? P17. From what you have seen or heard about the flu vaccination campaign, what do you remember?

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Where hear about the flu vaccination campaign?

Massive media is the channel where Px know about flu campaign, algo by the public institutions.



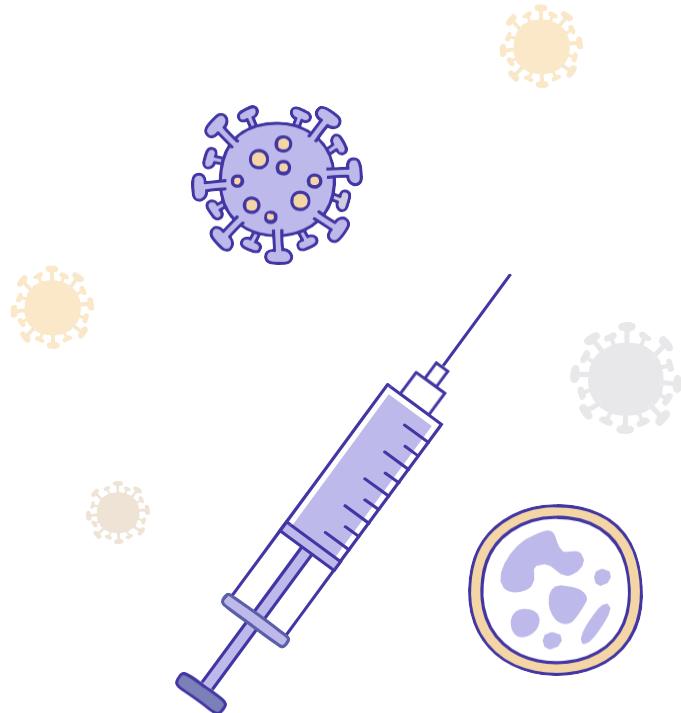
Base

n = 153

P17a. Where did see or hear about the flu vaccination campaign?

n = 23
Multiplicity: 1.3

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03

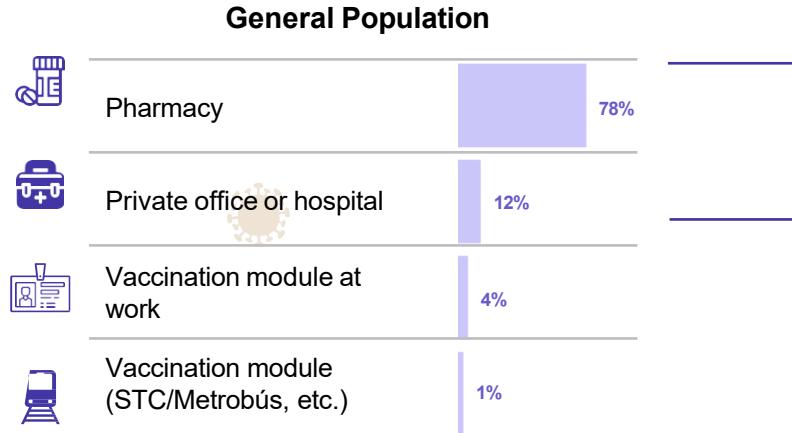
Vaccine application



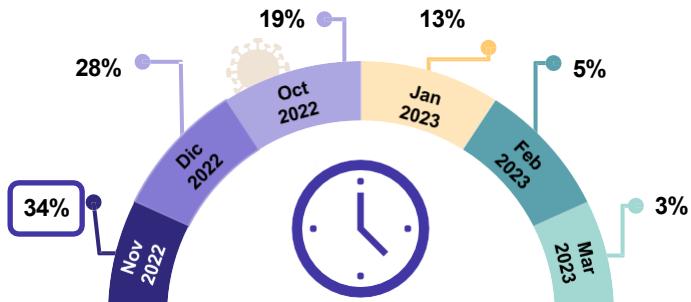
Vaccinated against flu

Px applied the flu vaccine in November 2022 in the pharmacy but also in Private office or hospital

Where...



Application month



Base n = 138*

P18. Could you tell me if you received the flu vaccine in the last 6 months? P19. Could you please tell me, in what month was the flu vaccine applied? P20. Where did you get the flu shot? P20a. Since you selected the place where you received the influenza vaccine, can you tell us what are the reasons why you did it in that place?

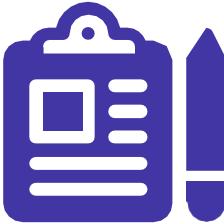
Pharmacy

	Total	Mothers of children from 6 to 59 months	Population with some comorbidity	Population without comorbidities	Pregnant women	Adults over 60
n =	49	11	8	9	9	12
Farmacia del Ahorro	27	36	25	22	22	25
Farmacia Guadalajara	27	27	25	33	-	42
Farmacia San Pablo	22	18	38	-	44	17
Farmacia Benavides	12	-	13	44	-	8
Farmacia Similares	10	18	-	-	22	8
Farmacia GI	2	-	-	-	11	-

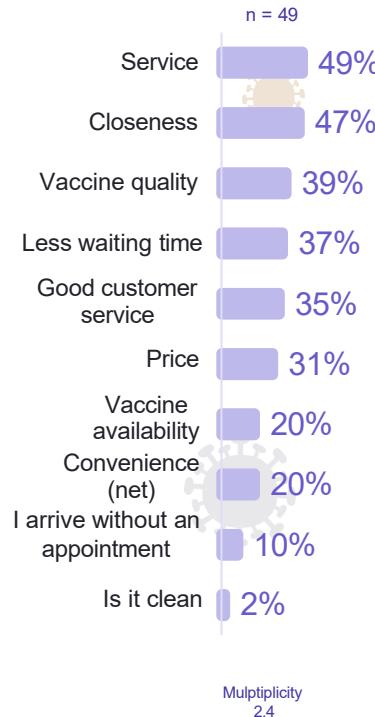
Private

	Total	Mothers of children from 6 to 59 months	Population with some comorbidity	Population without comorbidities	Pregnant women	Adults over 60
Clinic / Office (net)	70	50	-	100	50	100
Clinica Médica Polanco	10	-	-	33	-	-
Private doctor	40	50	-	33	50	50
Family doctor (GP)	20	-	-	33	-	50
Hospital (net)	30	50	100	-	50	-
Médica Sur	10	-	100	-	-	-
Hospital general	10	50	-	-	-	-
H+	10	-	-	-	50	-

Vaccinated against flu



Reasons



Base

n = 138*

P20a. Since you selected the place where you received the influenza vaccine, can you tell us what are the reasons why you did it in that place?

The main reason for the place where get vaccinated is because the service and closeness of the place.

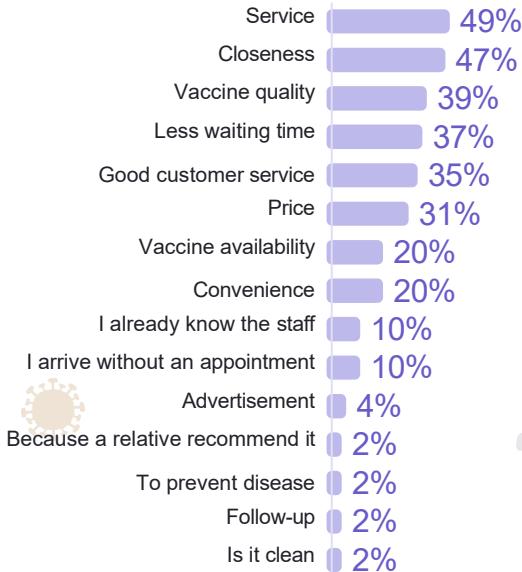
	Mothers of children from 6 to 59 months	Population with some comorbidity	Population without comorbidities	Pregnant women	Adults over 60	%
n = 11	n = 8	n = 9	n = 9	n = 12		
46	25	78	22	67		
46	13	78	22	67		
55	38	56	22	25		
9	75	33	33	42		
36	38	56	11	33		
55	25	-	22	42		
9	13	33	11	33		
9	13	33	11	33		
9	-	-	22	17		
-	13	-	-	-		
Multiplicity 2.4	Multiplicity 2.1	Multiplicity 2.6	Multiplicity 1.9	Multiplicity 2.9		

Vaccinated against flu

Pharmacy



Reasons



Multiplicity
2.4

	Mothers of children from 6 to 59 months n = 23	Population with some comorbidity n = 18	Population without comorbidities n = 13	Pregnant women n = 23	Adults over 60 n = 23	%
Service	46	25	78	22	67	
Closeness	46	13	78	22	67	
Vaccine quality	55	38	56	22	25	
Less waiting time	9	75	33	33	42	
Good customer service	36	38	56	11	33	
Price	55	25	-	22	42	
Vaccine availability	9	13	33	11	33	
Convenience	9	13	33	11	33	
I already know the staff	9	-	-	22	17	
I arrive without an appointment	18	-	-	22	8	
Advertisement	-	-	-	11	8	
Because a relative recommend it	-	13	-	-	-	
To prevent disease	-	-	-	-	8	
Follow-up	-	-	-	11	-	
Is it clean	-	-	-	-	8	

Multiplicity
2.4 Multiplicity
2.1 Multiplicity
2.6 Multiplicity
1.9 Multiplicity
2.9

Base

n = 100 *

P20a. Since you selected the place where you received the influenza vaccine, can you tell us what are the reasons why you did it in that place?

CONFIDENTIAL

Why Px selected pharmacy?

The main reason for getting vaccinated in a pharmacy is because of HCPs recommendation or the Px don't have Social Security.

Physician



The HCPs recommend getting vaccinated in the pharmacy and making an appointment for a follow-up

Quality



The conditions of the vaccines are better perceived when its paying for it.

Social Security



"I don't have social security, so I'll get vaccinated in the pharmacy"

Time



I'd rather go to a pharmacy than to a health center where are too many people. It's faster.

Condition



"I'm pregnant", "Because of my age", "I have a respiratory disease"

Confidence



Attention, service, and "It's well refrigerated"

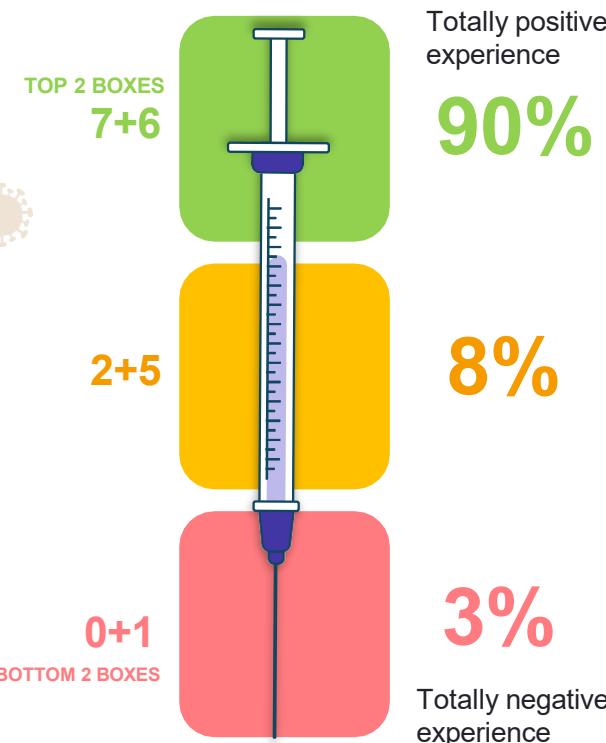


Requested

"It's mandatory in my work"

Experience

Vaccinated



The experience of those already vaccinated is positive, only 2% had bad experiences.

	Mothers of children from 6 to 59 months	Population with some comorbidity	Population without comorbidities	Pregnant women	Adults over 60
n =	17	15	16	14	20
Top 2 Boxes	88%	80%	94%	100%	90%
Bottom 2 Boxes	-	13%	-	-	-

Base n = 138*

P21. Using the following scale, where 1 means a totally negative experience and 7 a totally positive experience, how was your experience when you got the flu vaccine? P21a. For what reason did you score ... the last time you got your flu shot?

Experience Vaccinated



The main reason is not having side effects; however, the negative experience is from high-risk population having side effects.

Reasons positive experience

	Total	Mothers of children from 6 to 59 months	Population with some comorbidity	Population without comorbidities	Pregnant women	Adults over 60
n =	74	15	12	15	14	18
Don't have Side effects	45	33	42	53	50	44
They are kind	16	13	8	13	14	28
It's fast	15	20	42	20	-	-
Effectiveness	5	-	8	13	-	6
It's safety	5	-	-	7	14	6
Quality	3	-	8	7	-	-
Multiplicity	1.5	1.3	1.6	1.6	1.4	1.4

Reasons negative experience

	Total	Mothers of children from 6 to 59 months	Population with some comorbidity	Population without comorbidities	Pregnant women	Adults over 60
n =	2	-	2	-	-	-
I got a bad flu	50	-	50	-	-	-
Injections scare me	50	-	50	-	-	-
Multiplicity	1.0	-	1.0	-	-	-

Base

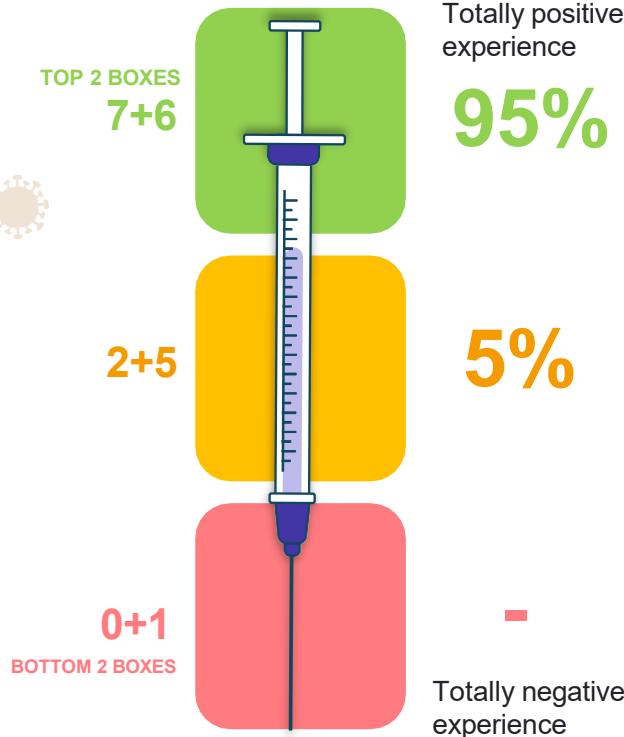
n = 153

P21a. For what reason did you score ... the last time you got your flu shot?

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Experience

Previously



The previous experience is also positive, no bad experience recorded.

	Mothers of children from 6 to 59 months	Population with some comorbidity	Population without comorbidities	Pregnant women	Adults over 60
n =	13	10	12	11	15
Top 2 Boxes	92%	90%	100%	91%	100%
Bottom 2 Boxes	-	-	-	-	-

Experience

Previously

The main reason is not having side effects, however, the negative experience y from high-risk populations and because side effects.



Reasons positive experience

	Total	Mothers of children from 6 to 59 months	Population with some comorbidity	Population without comorbidities	Pregnant women	Adults over 60
n =	74	12	9	12	10	15
Don't have Side effects	41	17	56	42	60	40
Good service	19	-	22	17	30	27
It's fast	10	33	11	8	-	-
It's safety	7	-	-	8	10	13
To prevent disease	5	-	11	8	-	7
Quality	5	-	11	-	10	7
Multiplicity	1.4	1.4	1.1	1.6	1.6	1.4



Base

n = 153

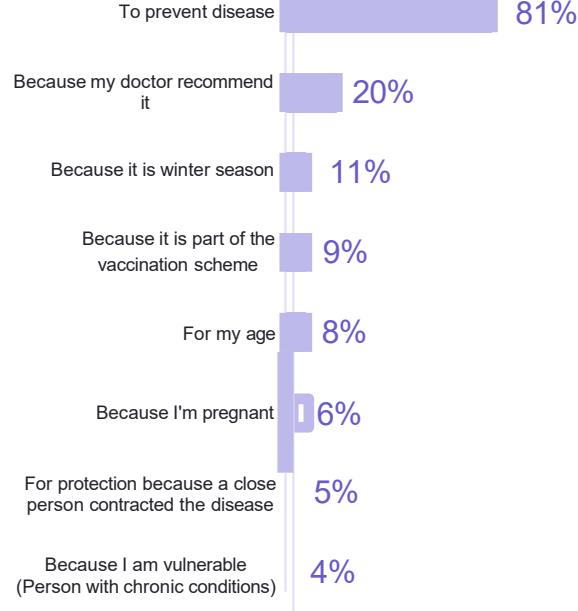
P28. For what reason did you rate with... the experience of the previous time you received the influenza vaccine?

CONFIDENTIAL

Motivation to get vaccinated



n = 82



Base n = 138*
P22. What prompted you to get the flu vaccine?

The motivation to get vaccinated was to prevent the disease, also because medical recommendation and by the winter season.

	Mothers of children from 6 to 59 months n = 17	Population with some comorbidity n = 15	Population without comorbidities n = 16	Pregnant women n = 14	Adults over 60 n = 20	%
To prevent disease	94	73	81	71	80	
Because my doctor recommend it	29	20	25	14	15	
Because it is winter season	12	7	25	7	5	
Because it is part of the vaccination scheme	6	7	25	-	5	
For my age	-	13	-	7	15	
Because I'm pregnant	-	-	-	36	-	
For protection because a close person contracted the disease	-	7	13	-	5	
Because I am vulnerable (Person with chronic conditions)	-	13	6	-	-	
	Multiplicity 1.4	Multiplicity 1.5	Multiplicity 1.9	Multiplicity 1.5	Multiplicity 1.4	
			13	-	-	

Intention to get vaccinated again

94%

Have intention to get vaccinated again

75%
Previously vaccinated against flu

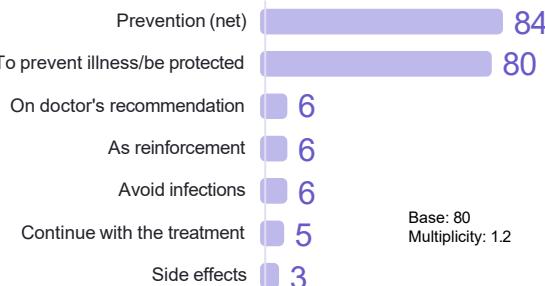


Base n = 138*

P23. Do you plan to get your flu shot again next year? P24. Why do you intend to get your flu shot again next year? P25. Had you previously been vaccinated against flu? P26. How often do you get the flu vaccine?

9 out of 10 Px have intention to get vaccinated again because prevention. 7 out of 10 have previously been vaccinated with a frequency of every year.

Why?...



	Total	Mothers of children from 6 to 59 months	Population with some comorbidity	Population without comorbidities	Pregnant women	Adults over 60	%
n =	61	13	10	12	11	15	
Every year	95%	92	100	92	100	93	
Twice a year	3%	-	-	8	-	-	
Every 2 years	2%	8	-	-	-	-	



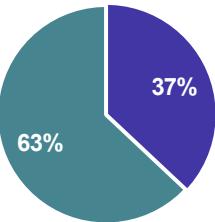
04

COVID

Flu & COVID vaccine

63% don't get vaccinated simultaneously with flu and COVID mostly because of side effects or medical recommendation.

Apply simultaneously flu and COVID vaccines



■ Yes ■ No

	Mothers of children from 6 to 59 months	Population with some comorbidity	Population without comorbidities	Pregnant women	Adults over 60
n =	31	34	31	28	29
Yes	32%	41%	32%	32%	45%

	Mothers of children from 6 to 59 months	Population with some comorbidity	Population without comorbidities	Pregnant women	Adults over 60
No	68%	59%	68%	68%	55%

Base

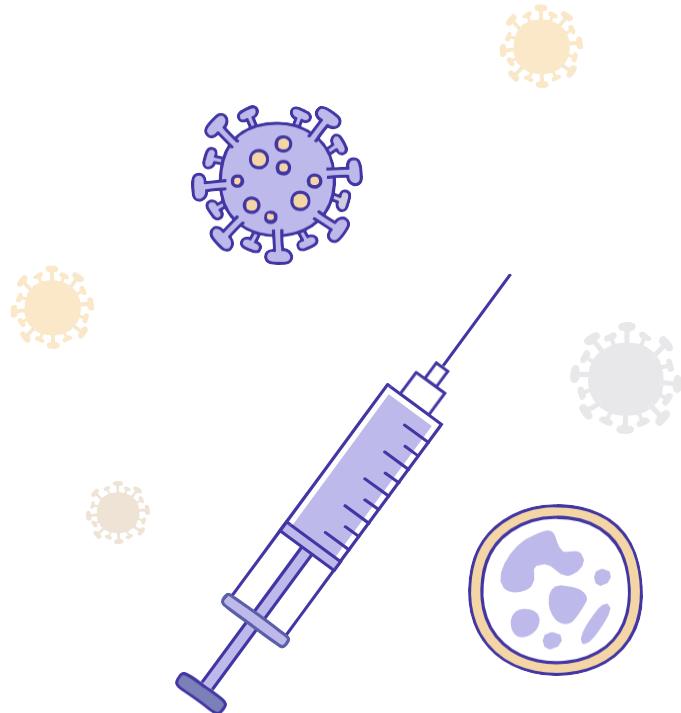
n = 153

P30. Would you simultaneously apply the flu and Covid-19 vaccines? P30a. Why wouldn't you get the Influenza and COVID-19 vaccines simultaneously?

Why?

	Total	Mothers of children from 6 to 59 months	Population with some comorbidity	Population without comorbidities	Pregnant women	Adults over 60
n =	97	21	20	21	19	16
I am afraid of adverse events	47	33	45	52	47	63
My doctor does not recommend it	29	29	45	19	32	19
Could be harmful	25	29	15	33	21	25
I was denied at the health center	4	-	5	-	16	-
The COVID-19 vaccine protects me from the flu	3	5	5	5	-	-
The COVID-19 vaccine protects me from all other respiratory diseases	2	10	-	-	-	-
The Covid-19 vaccine has side effects	2	5	5	-	-	-
It has a broad protection aspect	1	-	-	-	-	6
Multiplicity	1.1	1.1	1.2	1.1	1.2	1.1

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05

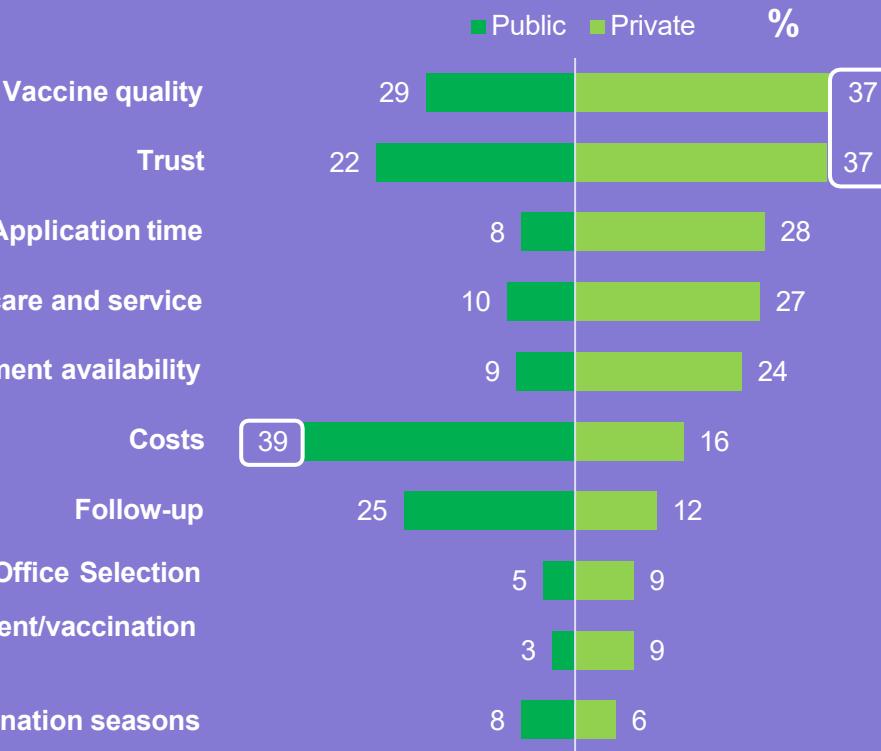
Perception

Public and Private

Advantages

By sector

Vaccine quality and trust are the first position as an advantage by being vaccinated in the private sector, however, public sector costs are an advantage because it's free.



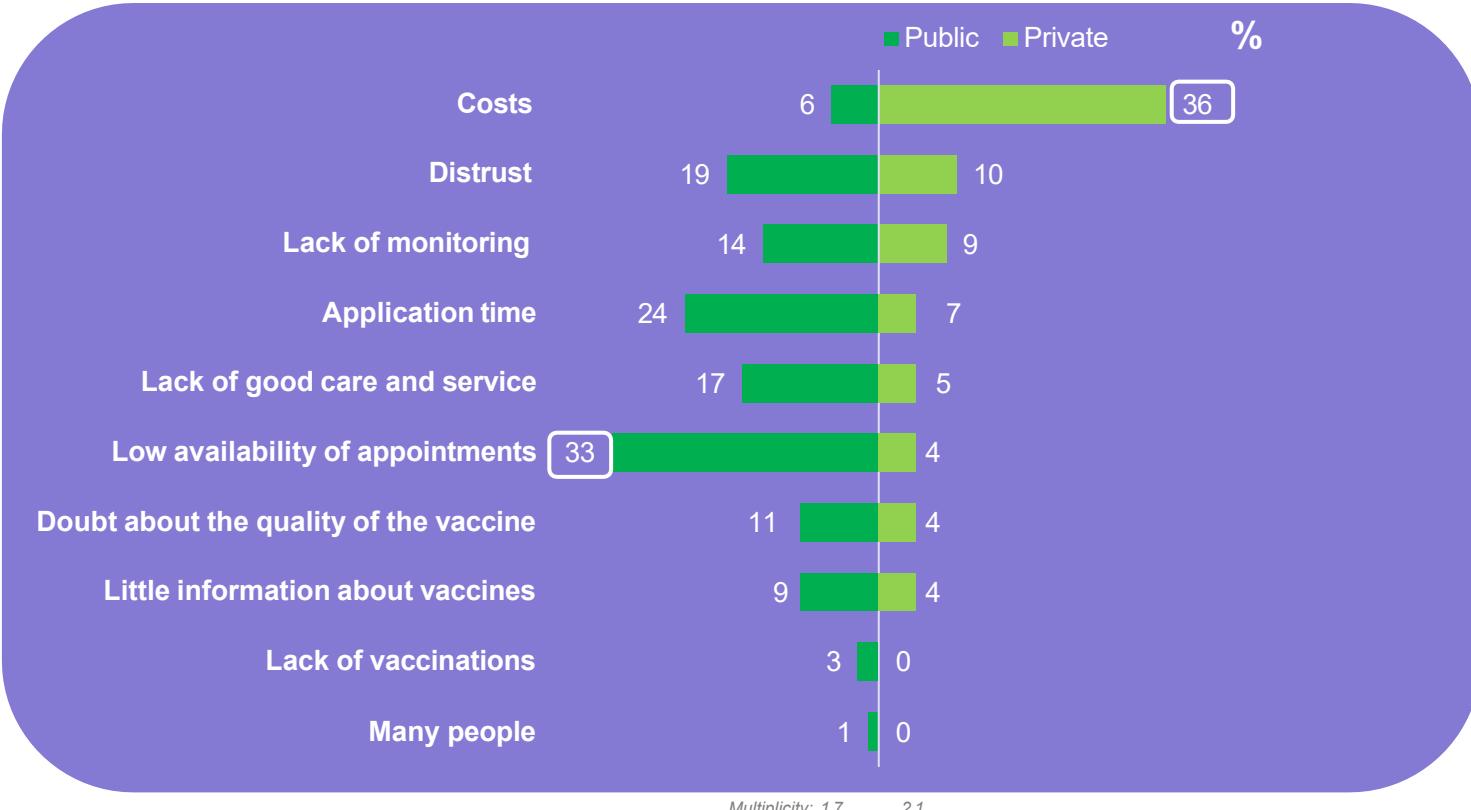
Multiplicity: 1.5

1.1

Disadvantages

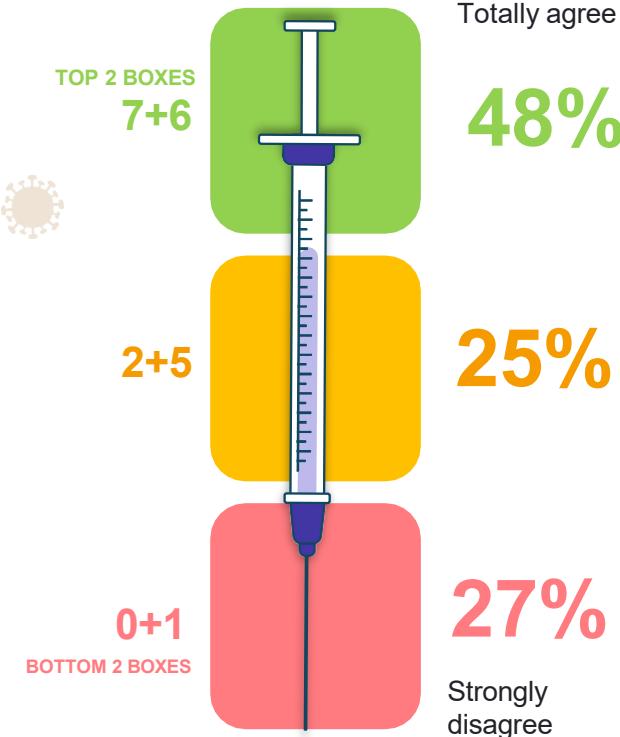
By sector

Costs are a disadvantage in the private sector, and in public sector is the low availability of appointments



Quality

Vaccine



4 out of 10 people consider private vaccines are better quality.

	Mothers of children from 6 to 59 months	Population with some comorbidity	Population without comorbidities	Pregnant women	Adults over 60
n =	31	34	31	28	29
Top 2 Boxes	52%	50%	36%	43%	62%
Bottom 2 Boxes	13%	29%	52%	21%	17%

Base

n = 153

P33. Do you consider that the vaccines given by a private doctor are of a higher quality than those given by the Health System? P33a. For what reason did rate the quality of the vaccines given by a private doctor to those given in the Health System?

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Quality Vaccine



The main reason is not having side effects, however, the negative experience y from high-risk populations and side effects.

Reasons totally agree

	Total	Mothers of children from 6 to 59 months	Population with some comorbidity	Population without comorbidities	Pregnant women	Adults over 60
n =	74	16	17	11	12	18
Quality	60	63	82	55	58	39
Safety	30	13	18	27	42	50
It is from a prestigious laboratory	18	31	18	18	-	17
Service	10	13	12	-	8	11
Effectiveness	8	-	12	9	8	11
Its available	4	6	-	18	-	-
Multiplicity	1.4	1.4	1.5	1.6	1.3	1.3

Reasons totally disagree

	Total	Mothers of children from 6 to 59 months	Population with some comorbidity	Population without comorbidities	Pregnant women	Adults over 60
n =	2	-	2	-	-	-
Quality	68	57	74	25	80	69
Trust	27	29	26	-	40	31
Multiplicity	1.2	1.1	1.2	1.3	1.2	1.1

Base

n = 153

P33. Do you consider that the vaccines given by a private doctor are of a higher quality than those given by the Health System? P33a. For what reason did rate the quality of the vaccines given by a private doctor to those given in the Health System?

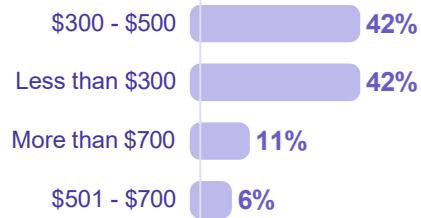
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Price & acquisition

The average price per dose of vaccine that Px are willing to pay is more than \$409 and application in chain pharmacies.

\$409.00 MXN

Average price

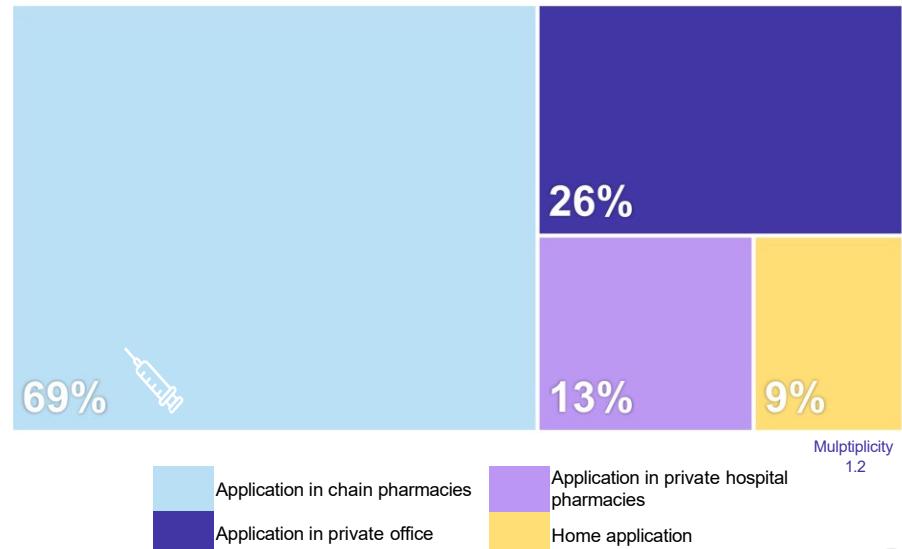


Base

n = 153

P34. Speaking of getting the vaccine, at what price are you comfortable getting the flu vaccine? P35. Where would he consider purchasing this vaccine?

Where get the vaccine...



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Chain pharmacies

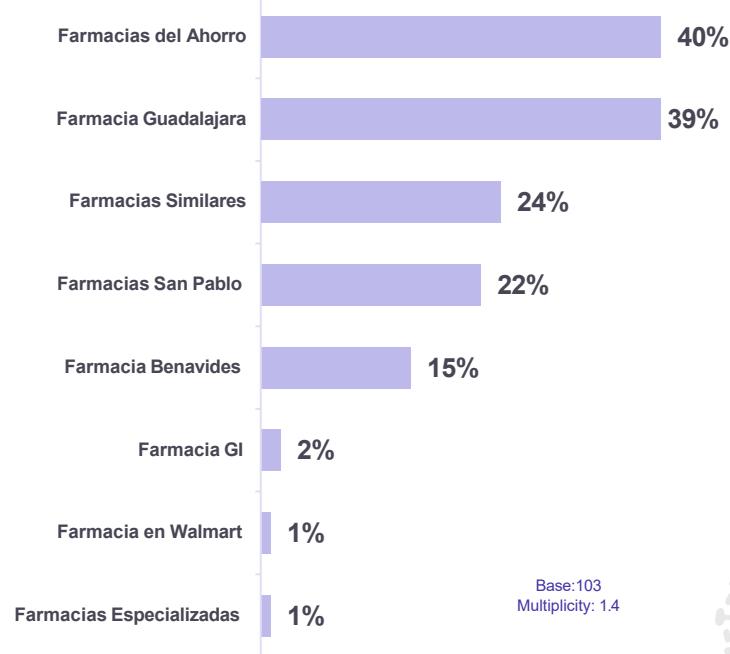
Farmacias del ahorro is the most mentioned for acquisition of a vaccine, Farmacias Guadalajara goes down only by one point. The service is the main reason for visiting a chain pharmacy.

	Mothers of children from 6 to 59 months n = 10	Population with some comorbidity n = 8	Population without comorbidities n = 7	Pregnant women n = 9	Adults over 60 n = 7
Service	40	50	43	44	57
 Price	30	63	43	22	71
Good customer service	30	13	14	44	14
Less waiting time	30	13	14	33	-
Convenience	10	-	14	33	29
Vaccine availability	10	-	14	33	29
Vaccine quality	20	-	-	22	14
I arrive without an appointment	-	13	-	22	-
Follow-up	20	-	-	11	-
I already know the staff	-	-	14	-	-
Multiplicity	1.8	1.5	1.4	2.3	1.9

Base

n = 153

P36. You mentioned direct sales in chain pharmacies. In which specific establishment would you consider purchasing this vaccine? P36a. Why did you choose over other pharmacies?



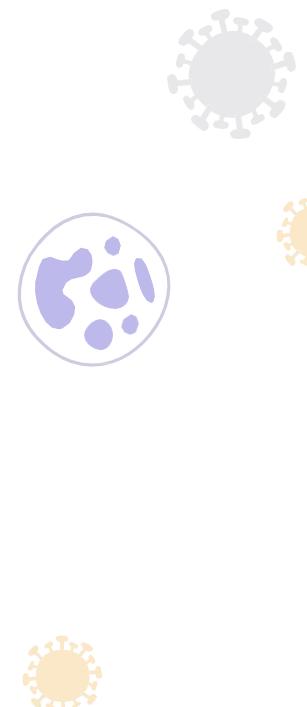
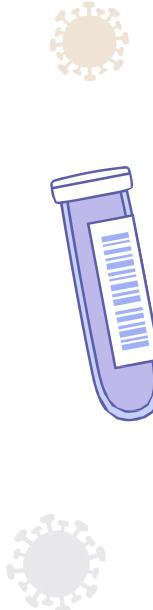
By sector



		Mothers of children from 6 to 59 months	Population with some comorbidity	Population without comorbidities	Pregnant women	Adults over 60	
TOM		46%	20%	46% TOM	35% TOM	31% TOM	
SOM		50%	50%	62% SOM	54% SOM	62% SOM	
Application	Frequency	79% every year	88% Every year	80% Every year	79% Every year	92% Every year	
	Month	42% Dic-22	40% Dic-22	50% Nov-22	36% Oct-22	35% Nov-22	
Experience flu vaccine	Previously vaccinated	92% T2B	80% T2B	100% T2B	91% T2B	90% T2B	
	When vaccinated	88% T2B	90% T2B	88% T2B	100% T2B	100% T2B	
Quality flu vaccine	Private doctor vs Public	52% T2B	50% T2B	36% T2B	43% T2B	62% T2B	
		13% B2B	29% B2B	52% B2B	21% B2B	17% B2B	
Average price for vaccine		\$331	\$424	\$377.00	\$344	\$539	
Prefer pharmacy		50% Farmacia del ahorro	38% Farmacia del ahorro	53% Farmacia Guadalajara	41% Farmacias del Ahorro	38% Farmacia Guadalajara	



**Mothers of
children from 6
to 59 months**



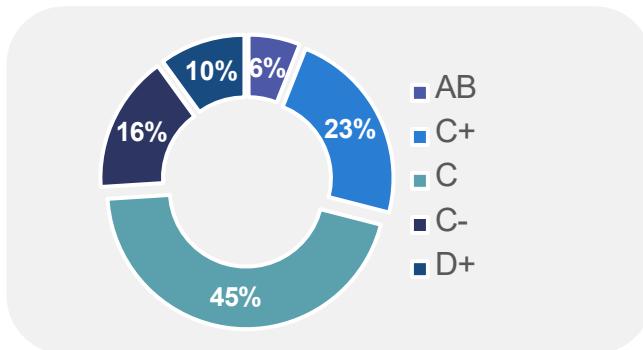
Mothers of children from 6 to 59 months Profile

More women have children (1 or 2) and take care of them, CDMX is the principal city, 7 out of 10 has received vaccine at a chain pharmacy.

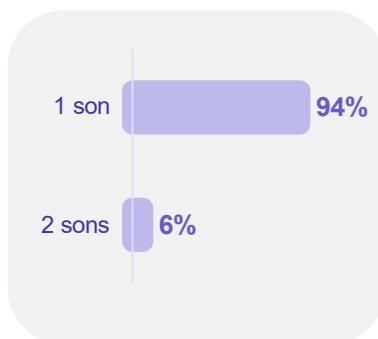
Gender



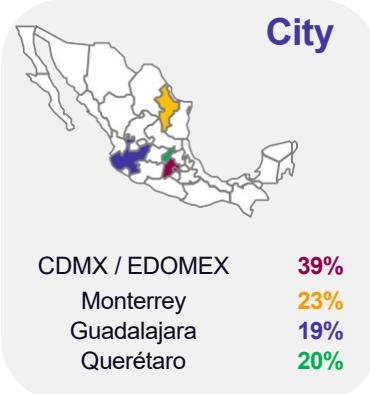
SLE



Number of children



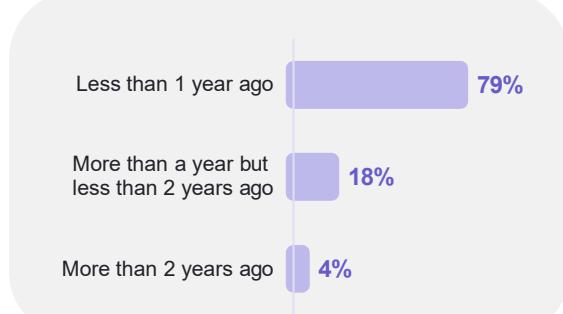
City



Average Age 33 y.o.

74% Has received a vaccine at a chain pharmacy

How long ago was your kid vaccinated?



Base

n = 153

F1. Gender, NSE, F3. Age, F5. How long ago was the most recent time your child received a flu shot? F8. Have you had a flu shot? F9. How long ago were you vaccinated against flu? P1. Are you up to date on your vaccination record?

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Mothers of children from 6 to 59 months Profile

sanofi

This profile got a good experience with the flu vaccine, know about the importance and it's in their minds, used to get vaccinated every year in the month of December, prefer a chain pharmacy.

Application	Average price	Prefer chain pharmacy
	\$331.00 MXN	50% Farmacia del ahorro
	Frequency	79% Every year
Experience flu vaccine	Month	42% Dic-22
	Previously vaccinated	92% T2B 50% It's fast
Quality flu vaccine	When vaccinated	88% T2B 47% Service
	Private doctor vs Public Institution	52% T2B 13% B2B

Base

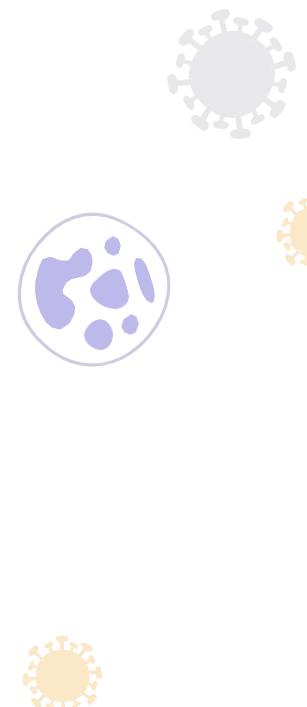
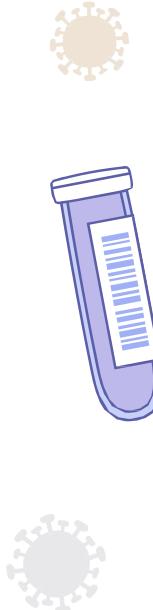
n = 153

P3. Could you tell me what vaccinations you know in general, even if you have not applied them? Other? P15. In general, how often does the person(s) who live with you get the flu vaccine? P19. Could you please tell me, in what month was the influenza vaccine applied? P21. Using the following scale, where 1 means a totally negative experience and 7 a totally positive experience, how was your experience when you got the flu vaccine? P21a. For what reason did you score ... the last time you got your flu shot? P27. Using the following scale, where 1 means a totally negative experience and 7 a totally positive experience, how was your experience the previous time you got the flu vaccine? P33. Do you consider that the vaccine?

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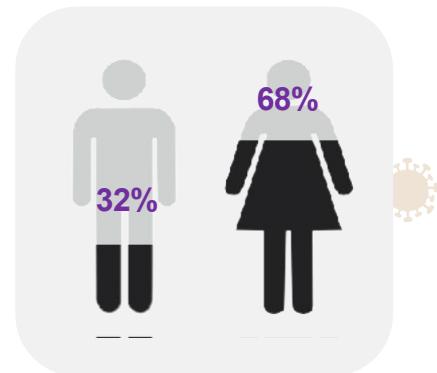
Population with some comorbidity



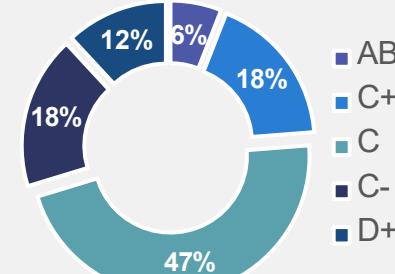
Population with some comorbidity Profile

This profile was vaccinated less than a year ago, also the main 2 comorbidities are diabetes and obesity in a population mostly women with average age of 41 y.o.

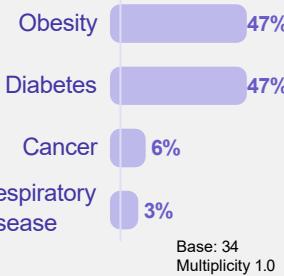
Gender



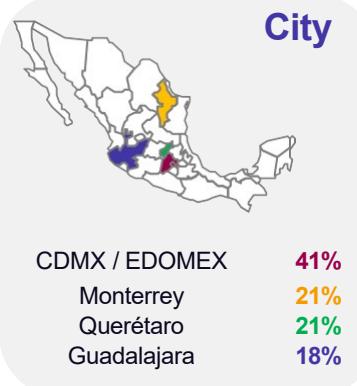
SLE



Comorbidity



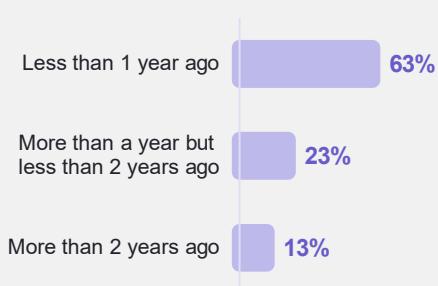
City



Average Age 41 y.o.

53% Has received a vaccine at a chain pharmacy

How long ago were vaccinated?



Base

n = 153

F1. Gender, NSE, F3. Age, F9. How long ago was received a flu shot? F8. Have you had a flu shot? F9. How long ago were you vaccinated against flu? P1. Are you up to date on your vaccination record?

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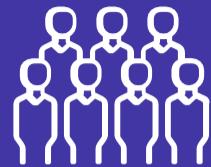
Population with some comorbidity Profile

High-risk population know about the vaccine, get the shot every year, more in winter season. The experience with the vaccine, despite its comorbidity, has been very good.

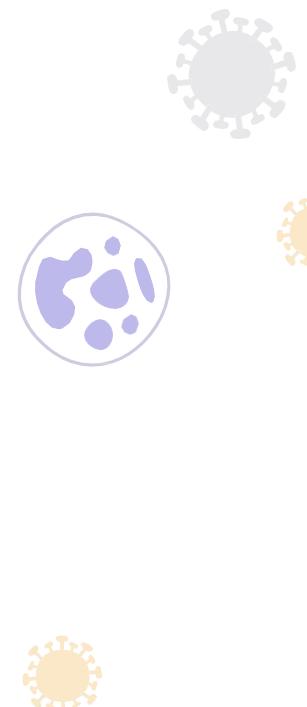
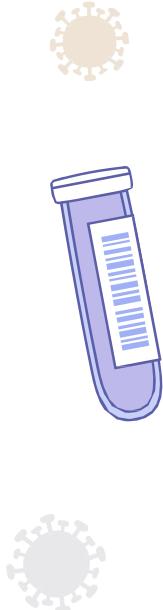
30% TOM 50% SOM	Average price \$424.15 MXN	Prefer chain pharmacy 38% Farmacia del ahorro
Application	Frequency Month	88% Every year 40% Dic-22
Experience flu vaccine	Previously vaccinated When vaccinated	80% T2B 13% B2B 42% Don't have side effects 90% T2B 47% Don't have side effects
Quality flu vaccine	Private doctor vs Public Institution	50% T2B 29% B2B

Base n = 153

P3. Could you tell me what vaccinations you know in general, even if you have not applied them? Other? P15. In general, how often does the person(s) who live with you get the flu vaccine? P19. Could you please tell me, in what month was the influenza vaccine applied? P21. Using the following scale, where 1 means a totally negative experience and 7 a totally positive experience, how was your experience when you got the flu vaccine? P21a. For what reason did you score ... the last time you got your flu shot? P27. Using the following scale, where 1 means a totally negative experience and 7 a totally positive experience, how was your experience the previous time you got the flu vaccine? P33. Do you consider that the vaccines given by a private doctor are of a higher quality than those given by the Health System? P34. Speaking of getting the vaccine, at what price are you comfortable getting the flu vaccine?



Population without comorbidities



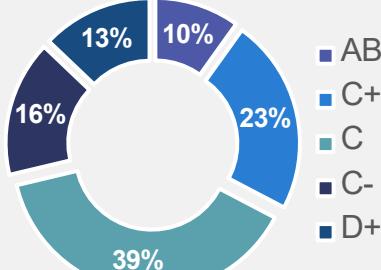
Population without comorbidity Profile

4 out of 10 px have received the flu vaccine at chain pharmacy. It predominates that 10% is from the SLE AB, average age of 36 y.o.

Gender



SLE



City



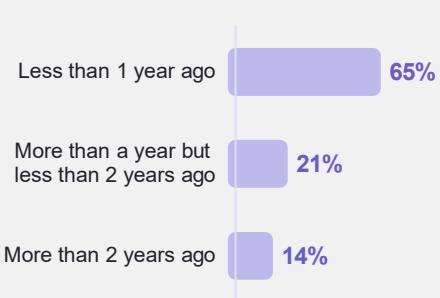
**Average Age
36 y.o.**

42% Has received a vaccine at a chain pharmacy

Base

n = 153

How long ago were vaccinated?



Population without comorbidity Profile

sanofi

Great experience with the flu vaccine, stand out the service and don't have side effects. Although this sector consider pay less than \$400. They get vaccinated in November, previous winter season.

Application	Average price	Prefer chain pharmacy
	\$377.00 MXN	53% Farmacia Guadalajara
Experience flu vaccine	Frequency	80% Every year
	Month	50% Nov-22
Quality flu vaccine	Previously vaccinated	100% T2B 50% Don't have side effects
	When vaccinated	88% T2B 47% Service
	Private doctor vs Public Institution	36% T2B 52% B2B

Base

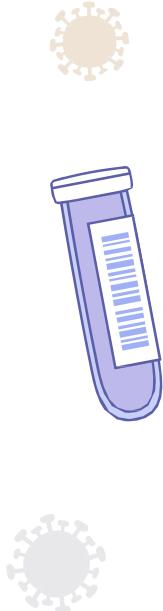
n = 153

P3. Could you tell me what vaccinations you know in general, even if you have not applied them? Other? P15. In general, how often does the person(s) who live with you get the flu vaccine? P19. Could you please tell me, in what month was the influenza vaccine applied? P21. Using the following scale, where 1 means a totally negative experience and 7 a totally positive experience, how was your experience when you got the flu vaccine? P21a. For what reason did you score ... the last time you got your flu shot? P27. Using the following scale, where 1 means a totally negative experience and 7 a totally positive experience, how was your experience the previous time you got the flu vaccine? P33. Do you consider that the vaccines given by a private doctor are of a higher quality than those given by the Health System? P34. Speaking of getting the vaccine, at what price are you comfortable getting the flu vaccine?

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Pregnant women



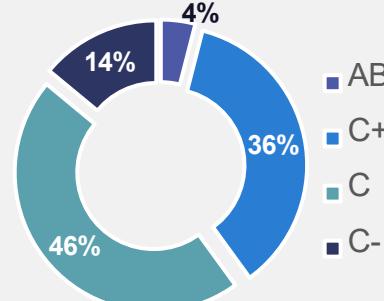
Pregnant women Profile

The pregnant women are from C SLE, with average age of 30 y.o., 8 out of 10 px has received a vaccine in pharmacy.

Gender



SLE



City



CDMX / EDOMEX
Monterrey
Guadalajara
Querétaro

32%
25%
21%
21%

Average Age
30 y.o.

82% Has
received a
vaccine at a
chain pharmacy

Base

n = 153

How long ago were vaccinated?



Pregnant women Profile

sanofi

Great experience with the flu vaccine, Every year get vaccinated, and they do it in October, flu vaccine is in their minds, prefer pays less than \$400 in Farmacia del Ahorro.

35% TOM 54% SOM	Average price \$344.00 MXN	Prefer chain pharmacy 41% Farmacias del Ahorro
Application	Frequency Month	79% Every year 36% Oct-22
Experience flu vaccine	Previously vaccinated	91% T2B 60% Don't have side effects
	When vaccinated	100% T2B 50% Don't have side effects
Quality flu vaccine	Private doctor vs Public Institution	43% T2B 21% B2B

Base

n = 153

P3. Could you tell me what vaccinations you know in general, even if you have not applied them? Other? P15. In general, how often does the person(s) who live with you get the flu vaccine? P19. Could you please tell me, in what month was the influenza vaccine applied? P21. Using the following scale, where 1 means a totally negative experience and 7 a totally positive experience, how was your experience when you got the flu vaccine? P21a. For what reason did you score ... the last time you got your flu shot? P27. Using the following scale, where 1 means a totally negative experience and 7 a totally positive experience, how was your experience the previous time you got the flu vaccine? P33. Do you consider that the vaccines given by a private doctor are of a higher quality than those given by the Health System? P34. Speaking of getting the vaccine, at what price are you comfortable getting the flu vaccine?

CONFIDENTIAL



Adults over 60



Adults over 60 Profile

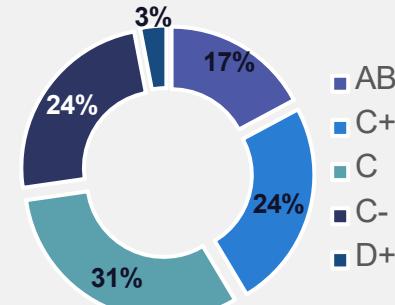
Adult over 60 still get vaccinated in pharmacy. SLE is primordially C, but also the highest in the profiles with AB.

sanofi

Gender



SLE



City



CDMX / EDOMEX
Monterrey
Guadalajara
Querétaro

38%
24%
21%
17%

Average Age
63 y.o.

79% Has
received a
vaccine at a
chain pharmacy

How long ago were vaccinated?



Base

n = 153

F1. Gender, NSE, F3. Age, F9. How long ago was received a flu shot? F8. Have you had a flu shot? F9. How long ago were you vaccinated against flu? P1. Are you up to date on your vaccination record?

CONFIDENTIAL

Adults over 60 Profile

Adults over 60 consider vaccines given by private doctor are higher quality, also is the sector who will pay more for the vaccine.

sanofi

31% TOM 62% SOM	Average price \$539.00 MXN	Prefer chain pharmacy 38% Farmacia Guadalajara
Application	Frequency <hr/> Month	92% Every year <hr/> 35% Nov-22
Experience flu vaccine	Previously vaccinated <hr/> When vaccinated	90% T2B 44% Don't have side effects <hr/> 100% T2B 47% Service
Quality flu vaccine	Private doctor vs Public Institution	62% T2B 17% B2B

Base

n = 153

P3. Could you tell me what vaccinations you know in general, even if you have not applied them? Other? P15. In general, how often does the person(s) who live with you get the flu vaccine? P19. Could you please tell me, in what month was the influenza vaccine applied? P21. Using the following scale, where 1 means a totally negative experience and 7 a totally positive experience, how was your experience when you got the flu vaccine? P21a. For what reason did you score ... the last time you got your flu shot? P27. Using the following scale, where 1 means a totally negative experience and 7 a totally positive experience, how was your experience the previous time you got the flu vaccine? P33. Do you consider that the vaccines given by a private doctor are of a higher quality than those given by the Health System? P34. Speaking of getting the vaccine, at what price are you comfortable getting the flu vaccine?

CONFIDENTIAL

Conclusions & Recommendations

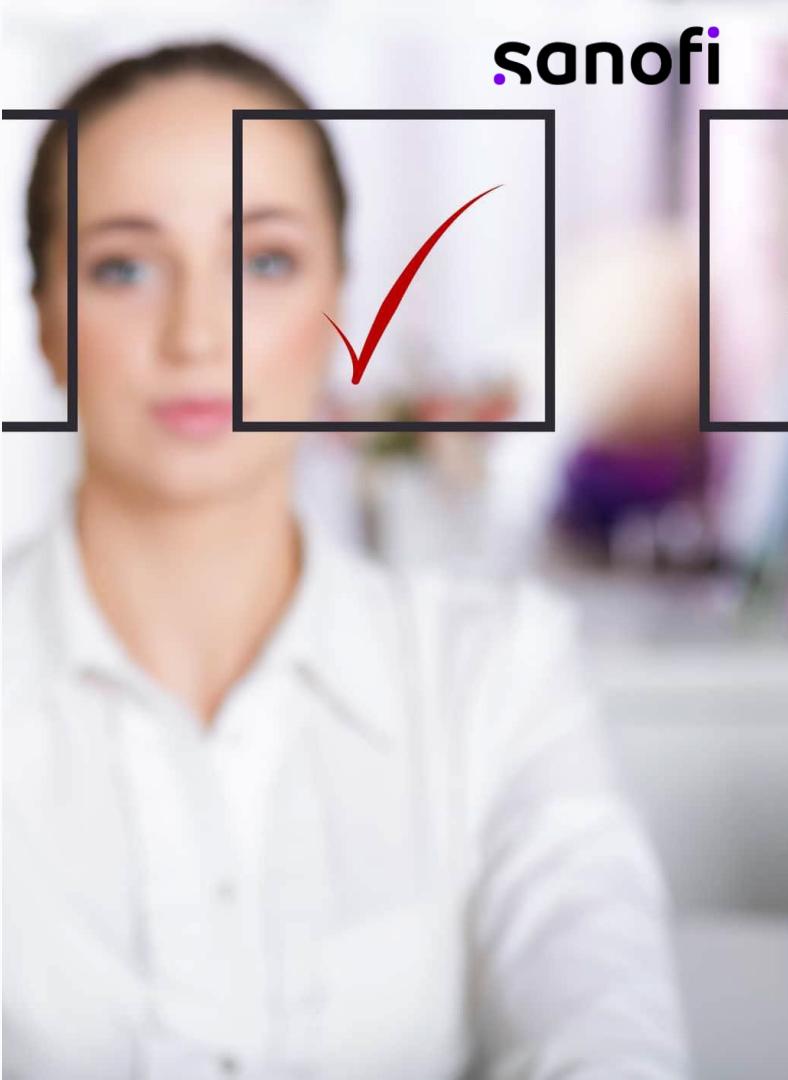


5

CONCLUSIONS AND RECOMMENDATIONS

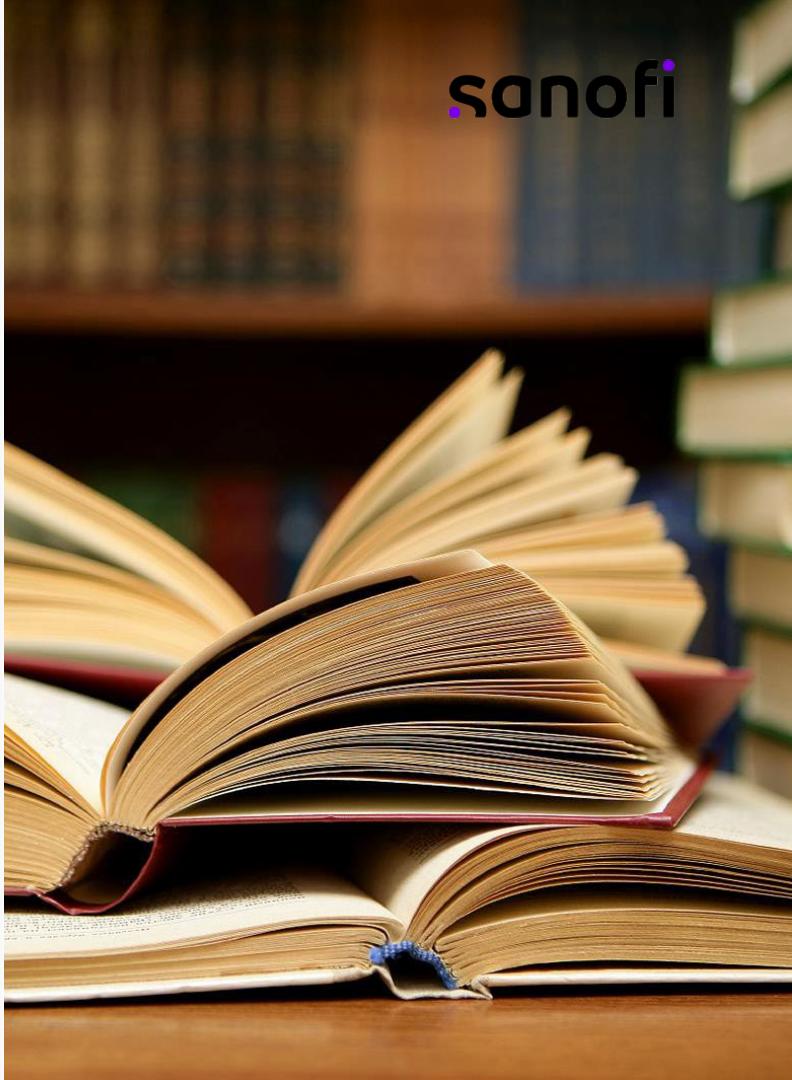
CONCLUSIONS

- The COVID-19 pandemic lowered barriers to adherence to vaccination schedules. The flu vaccine was favored in this situation.
- Demand increased and with it, **supply problems**
- The availability of the vaccine is decisive when choosing a certain brand for **decisors**
- They do not find differences between Fluzone and Fluzactal in safety, coverage, efficacy. They perceive them as similar. However among physicians that prescribe and recommend vaccination, Fluzone has better acceptance.
- The choice does not depend on performance or technical characteristics between the two vaccines.
- The distributor is the key piece in the acquisition of a certain brand.



CONCLUSIONS

- Only those who buy large amounts, such as medical corporations, have a direct deal with the manufacturer and the distributor goes to the background.
- Most acknowledge receiving a visit from the Sanofi Pasteur GSK sales force with other therapeutic areas also mentioning vaccines. Pfizer also seems to be very well known by Pfizer generating familiarity.
- Those who receive visits from the special sales force for vaccines from Sanofi Pasteur and GSK are the largest medical corporations, physicians have some interaction with Sanofi however this is limited or in distance.
- Opportunity in CME activities that are not very well present in the category.
- Definitely pharmacies are getting importance in vaccination due to accessibility, affordability, convenience and convenience.
- Physicians are aware of the benefits of vaccination in comorbid patients and try to recommend, how all are able to apply



RECOMMENDATIONS

- Work closely with the distribution companies business plans, strategic alliances to favor the displacement of Fluzone. Guarantee availability supply of the vaccine.
- If there are clinical studies supporting the superiority of Fluzone over Fluzactal or any differential technical aspect in favor of Fluzone, communicate it.
- Promote continuing medical education programs for doctors, both already prescribing and potential prescribers.
- Train new medical and nursing staff in charge of applying vaccines.
- Provide information regarding covid + flu vaccine combination that is a common concern



RECOMMENDATIONS

- Reinforce the brand presence through medical while reminding doctors about the vaccines. The message is diluted among the different therapeutic lines carried by the sales force.
- To be present in private institutions, with health professionals and patients, support the promotion fairs or vaccination days.
- Promote the development of vaccination camps especially in patients with risk factors, to increase awareness and the need to continue with the annual reinforcement scheme.

