



# Global Pharma Manufacturer Perception Tracker

## Vaccines

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2024

# Introduction

The vaccine industry has undergone an unprecedented transformation in the last 5 years, driven by significant advancements in technology and a renewed global focus on public health and immunization.

Breakthroughs in multiple areas like HSV, RSV, and COVID-19 have emerged. The rise of mRNA vaccines and innovations in self-administration methods, such as microneedle patches and nasal vaccines, are improving accessibility and compliance. Advances in DNA-based vaccines, viral vectors, and AI-driven development are accelerating production timelines.

As the demand for effective vaccines grows, competition among manufacturers is intensifying, pushing the need for continuous innovation. But which innovations truly move the needle? That depends on what healthcare professionals

(HCPs) value. HCPs are key influencers in vaccine recommendations and patient adoption—so understanding their perceptions is a crucial foundation for manufacturers' strategic decisions.

ZoomRx identifies the perceptions of manufacturers' strengths, areas for improvement, and opportunities for deeper collaboration with the healthcare community, by combining HCPs' ranking of vaccine manufacturers, their pipeline, and their promoter scores.

*HCPs are key influencers in vaccine recommendations and patient adoption — so understanding their perceptions is crucial for manufacturers.*

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# Top 5 Global Leaders

IN THE VACCINE SPACE

1

**Pfizer** takes the top spot by a *huge margin*

ZoomRx ranks Pfizer as the leader in the vaccine space. The company established tremendous credibility while developing its COVID-19 vaccine and still maintains this leading position globally with physicians unanimously ranking them at the top.



## **PORTFOLIO**

Pfizer boasts a strong portfolio, including Abrysvo's recent Phase 3 success for immunocompromised adults and updated mRNA COVID-19 vaccines for Omicron, both of which serve as significant growth drivers. Its promising pipeline—featuring combination vaccines (flu + COVID-19), and vaccines for C. difficile, Lyme disease, and CMV—positions Pfizer for continued dominance in the coming years.

## **PERCEPTION**

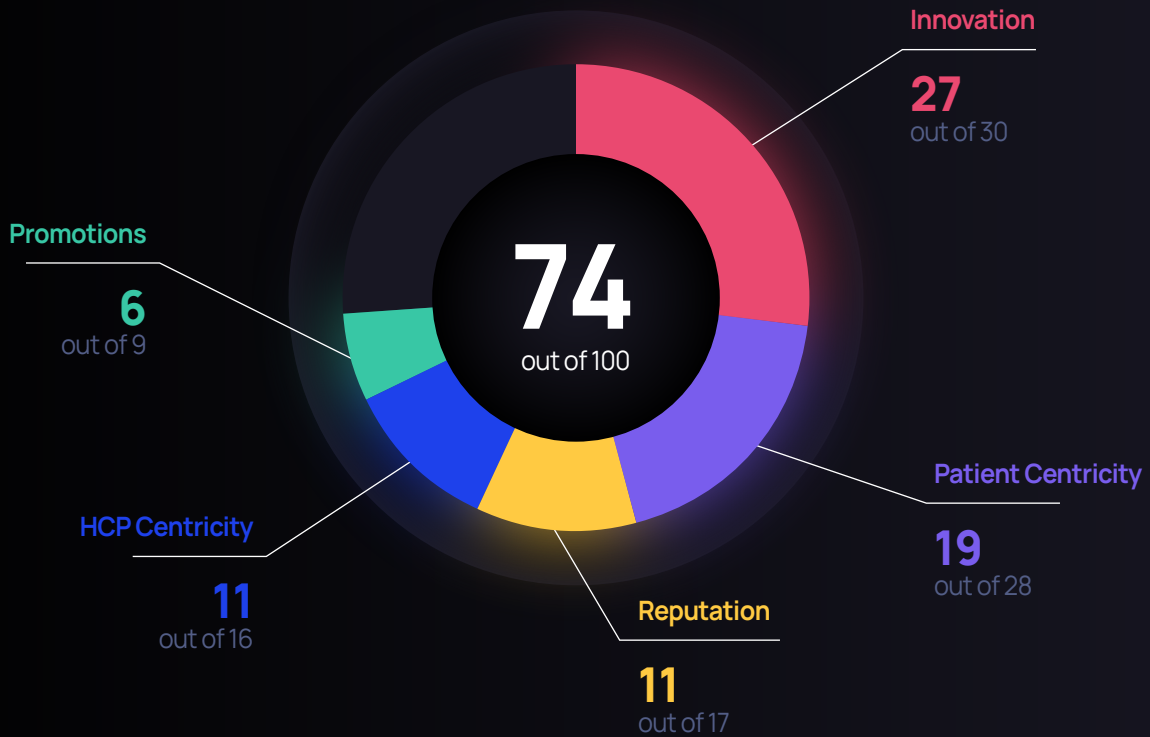
Pfizer is the undisputed leader across US and EU5. It leads in all key perception metrics, including top-of-mind awareness and Net Promoter Score (NPS).

## **BOTTOM LINE**

With ongoing investments in research, a robust pipeline, and support from Starboard's \$1 billion investment, ZoomRx projects that Pfizer will maintain its leading position in the vaccine space throughout 2025, outpacing the competition. While challenges such as overestimating COVID-19 vaccine demand and the slower-than-expected launch of its RSV vaccine exist, they are unlikely to significantly impact Pfizer's trajectory.

# 1

PERCEPTION SCORE  
PFIZER



PERCEPTION RANK ACROSS GEOGRAPHIES



*Pfizer, a global leader in the biopharmaceuticals industry, has established itself at the forefront of vaccine innovation and development. With a rich history of life saving vaccines, Pfizer continues to lead the charge in combating infectious disease worldwide. Their work in the development and distribution of COVID-19 vaccine show their commitment to public health..*





2

**GSK** follows as the  
*distant* runner up



**GSK maintains a strong market position with a positive NPS and strong perception scores, particularly in the meningococcal segment, and a promising portfolio. However, several setbacks have positioned it as a distant runner-up to Pfizer.**

The GSK logo is displayed in white, bold, sans-serif capital letters on a dark blue rounded rectangular background. A thin white line extends from the right side of the logo area across the top of the page.

#### **PORTFOLIO**

GSK is making significant progress in its portfolio. Positive phase II results for its mRNA seasonal flu vaccine, new long-term protection phase 3 data for Arexvy, topline results from the co-administration of Arexvy and Shingrix, and its 5-in-1 ABCWY vaccine currently under FDA review are expected to boost its reputation.

#### **PERCEPTION**

The CDC's narrowed recommendation for adult RSV vaccines, declining sales of its flagship shingles vaccine Shingrix, and its unsuccessful attempt to develop the first

HSV vaccine have negatively impacted GSK's standing. Moreover, its reputation rankings, especially in Spain, and Italy, further depress its perception score.

#### **BOTTOM LINE**

ZoomRx anticipates that portfolio advances, along with improved collaboration and engagement with HCPs through transparency, scientific support, and payer assistance, will help restore GSK's reputation and strengthen its perception rankings.

# 2

PERCEPTION SCORE  
GSK



PERCEPTION RANK ACROSS GEOGRAPHIES



*GSK has a diverse portfolio of vaccines covering various diseases, including influenza, hepatitis, and HPV, ensuring comprehensive protection...GSK has a history of successful vaccine development, including the first malaria vaccine candidate against a human parasite.*

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# Merck & Sanofi *compete* for third place



Merck and Sanofi are closely competing for the final spot in the podium in the vaccine market: Merck emphasizes innovation and a diverse pipeline, while Sanofi leads in influenza vaccines, though both face unique challenges in broadening their portfolios and global reach.



## PORTFOLIO

Merck's vaccine portfolio is robust, featuring Gardasil for HPV, pneumococcal vaccines, and pediatric options that secure its position among top manufacturers. Gardasil continues to see global sales growth, while Vaxneuvance gains traction from new launches outside the U.S. Recent FDA approval of Capvaxive and its [recommendation by the CDC](#) further enhance Merck's pneumococcal offerings. Additionally, Merck's RSV monoclonal antibody, [clesrovimab](#), has shown promising results in Phase 2b/3 trials, marking the company's entry into the RSV space. In collaboration with Moderna, Merck is also developing a personalized [mRNA cancer vaccine](#), which recently demonstrated improved survival rates in risk melanoma patients when combined with KEYTRUDA.

## PERCEPTION

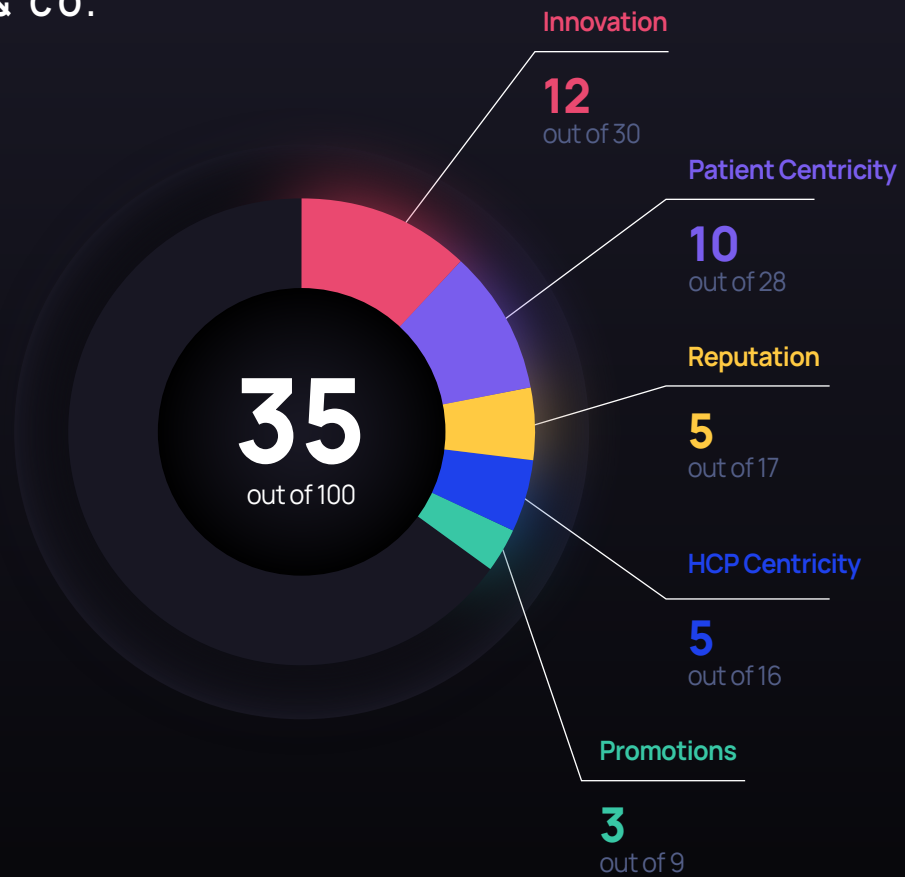
Merck is perceived as innovative, outperforming Sanofi but trailing behind Pfizer and GSK in innovation rankings. Merck scores lower than Sanofi on HCP-centricity and holds a stronger perception in the U.S. than in Europe.

## BOTTOM LINE

Having two vaccines in the immediate pipeline—clesrovimab for RSV in Phase 3 and V181 for dengue in Phase 2 and increasing demand for Gardasil and Vaxneuvance in ex-U.S. markets Merck is set to reduce the gap with the vaccine leaders.

# 3

PERCEPTION SCORE  
MERCK & CO.



PERCEPTION RANK ACROSS GEOGRAPHIES



*Gardasil is very important for protection of our young and middle aged patients; new capvaxive is exciting for patient care.*



## PORTFOLIO

Sanofi operates in a niche market and is recognized as the “influenza vaccine leader”. Most of its vaccine growth is driven by flu vaccines, while other offerings (e.g., polio, Hib) grow at low single-digit rates. Recent initiatives such as opening a modular vaccine factory in France, their headquarters, which will enable the company to scale up production of up to four vaccines simultaneously, have elevated Sanofi to the #2 rank in France, almost on-par with Pfizer.

## PERCEPTION

The company lacks variety and breadth in its vaccine offerings and has a slightly negative global NPS score, indicating a need to improve physician satisfaction and strengthen its market position to become a key challenger.

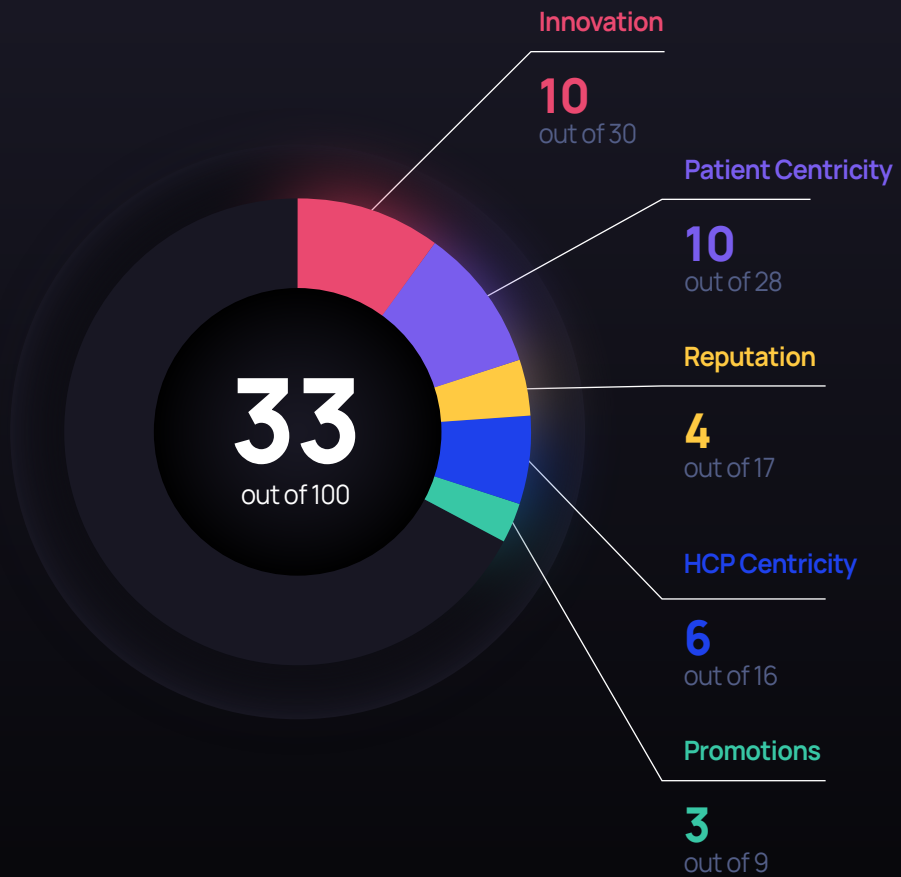
## BOTTOM LINE

While Sanofi aims to reinforce its leadership in flu vaccines, relying solely on influenza may be insufficient to maintain a top-three position, especially with anticipated declines in flu vaccine sales due to soft vaccination rates, as noted in its [Q3 earnings call](#). Broader enhancements across its vaccine portfolio are needed.

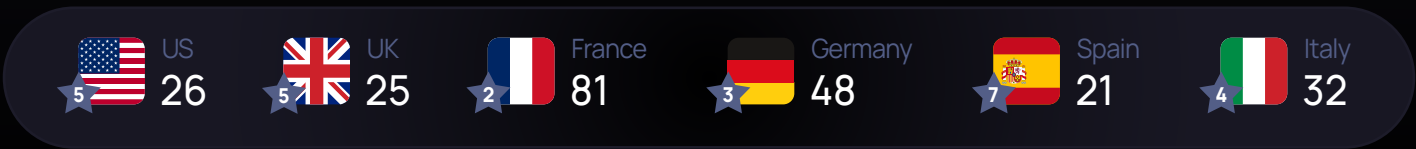
*French manufacturer with scientific ethics and high added value.*

# 4

PERCEPTION SCORE  
SANOFI



PERCEPTION RANK ACROSS GEOGRAPHIES



*Wide varieties of vaccine for children and adults against respiratory diseases (flu, RSV) and bacterial infections. (tetanus, diphtheria, etc.)*



## **AstraZeneca and Moderna** *round out* the pack

AstraZeneca, and Moderna rank similarly in the vaccine space, with each company showing strengths and gaps in their portfolios. AstraZeneca and Moderna focus on expanding beyond COVID-19, with challenges around portfolio breadth and innovation momentum.

## PORTFOLIO

Following the global success of its COVID-19 vaccine, Vaxzevria, with over 3 billion doses supplied worldwide, AstraZeneca withdrew the vaccine from the market in May 2024, anticipating no future commercial demand. The company is now actively revamping its vaccine portfolio, with innovations like FluMist, the first self-administered vaccine, signaling a new era in immunization. The company remains engaged in vaccine initiatives, including collaborations with the UK Health Security Agency to advance vaccine development and evaluation for future pandemic preparedness, along with investments in its Speke facility to focus on pediatric vaccine production.

## PERCEPTION

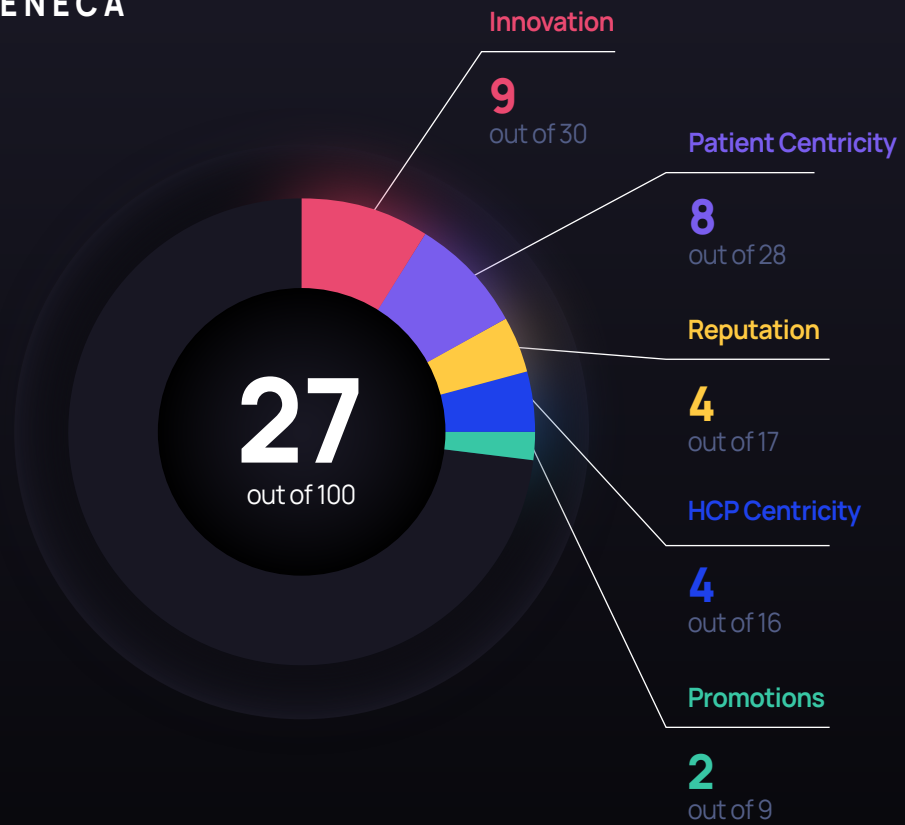
AstraZeneca is ranked higher in the vaccines space in EU countries compared to the US. Its NPS saw a global downturn, likely due to the withdrawal of Vaxzevria. However, its stronger focus on patient-centricity and promotional efforts gives it a slight edge over Moderna in this race.

## BOTTOM LINE

Despite these efforts, AstraZeneca's limited vaccine pipeline keeps it just outside the podium. To surpass Merck and Sanofi and secure the third spot, AstraZeneca will need to expand beyond its current focus on FluMist, sipavibart, its COVID-prevention drug, and its Sanofi-partnered RSV drug, Beyfortus, by adding more vaccines to its pipeline.

# 5

PERCEPTION SCORE  
ASTRAZENECA



PERCEPTION RANK ACROSS GEOGRAPHIES



*AstraZeneca was one of the first manufacturers to bring Vaxzevria to the market. In addition, the manufacturer is very well known internationally for its quality and reliability.*



## PORTFOLIO

Moderna has made waves in the vaccine industry with two approved vaccines this year: the COVID-19 vaccine and the newly FDA-approved RSV vaccine. The company is also developing a personalized [mRNA cancer vaccine](#) in collaboration with Merck, which recently demonstrated improved survival data in high-risk melanoma patients when combined with KEYTRUDA. Moderna now has five respiratory vaccines with positive Phase 3 results and expects to submit three for approval this year; however, they are all indication expansions of the COVID vaccine or the flu vaccine.

## PERCEPTION

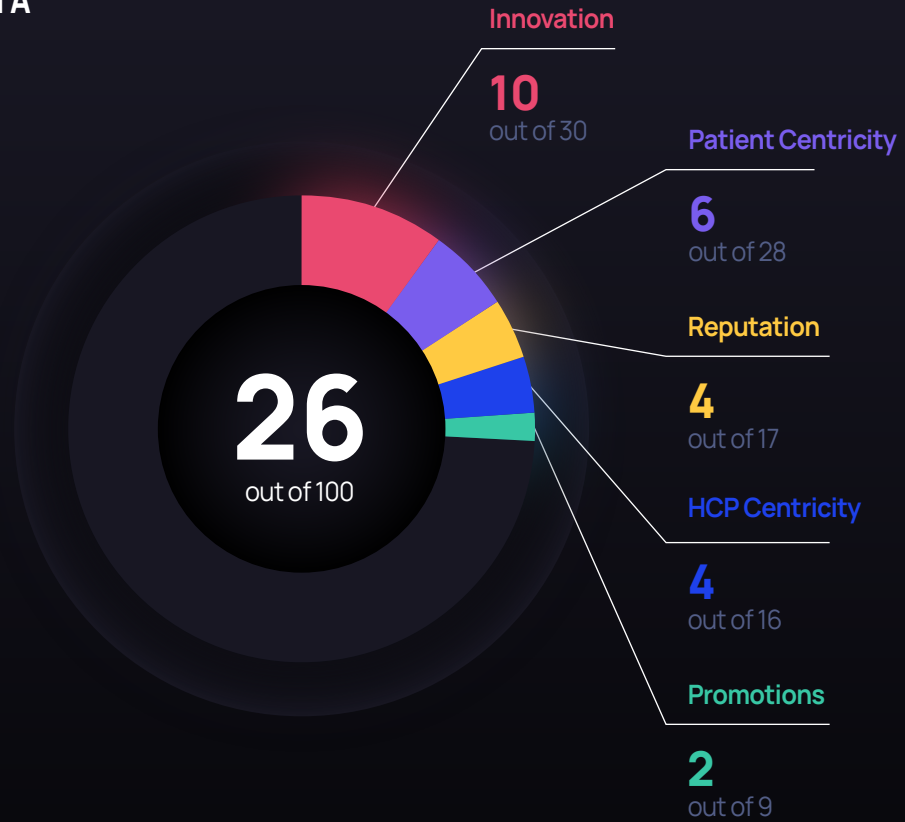
While Moderna has built its reputation with its COVID vaccine, much like AstraZeneca, it still lags, particularly in promotions and patient-centric attributes, such as patient assistance and commitment / engagement with the vaccines community.

## BOTTOM LINE

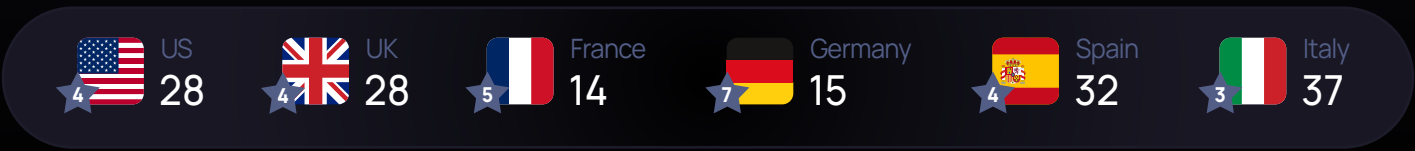
Moderna's strategy to [cut R&D spending by \\$1.1 billion by 2027](#), due to recent commercial setbacks, has led to a "more selective and paced" approach. This includes discontinuing over five programs and abandoning its standalone flu vaccine, mRNA-1010, in favor of a combined flu-COVID shot. This raises uncertainty about Moderna's ability to maintain its innovative momentum and the Top 5 rankings.

# 6

PERCEPTION SCORE  
MODERNA



PERCEPTION RANK ACROSS GEOGRAPHIES



*Very Innovative technology using mRNA.  
Their vaccines tend to have less side effects  
and a good reputation.*

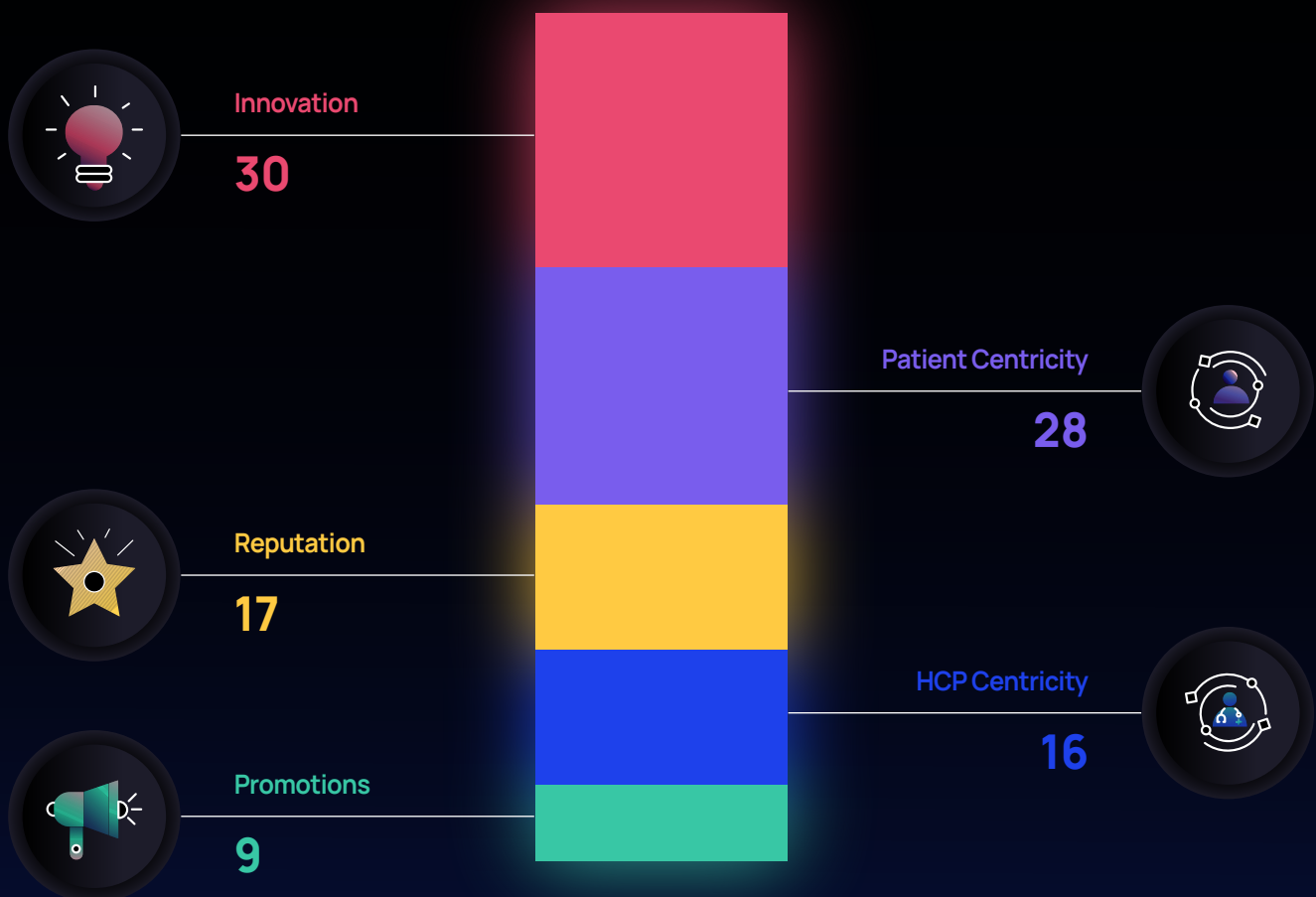


# What *sways* the mind of HCPs?

With HCPs' prescribing decisions as the driver for pharmaceutical uptake, it is crucial to understand not only which attributes they rank as most important—and which they actually weight most heavily.

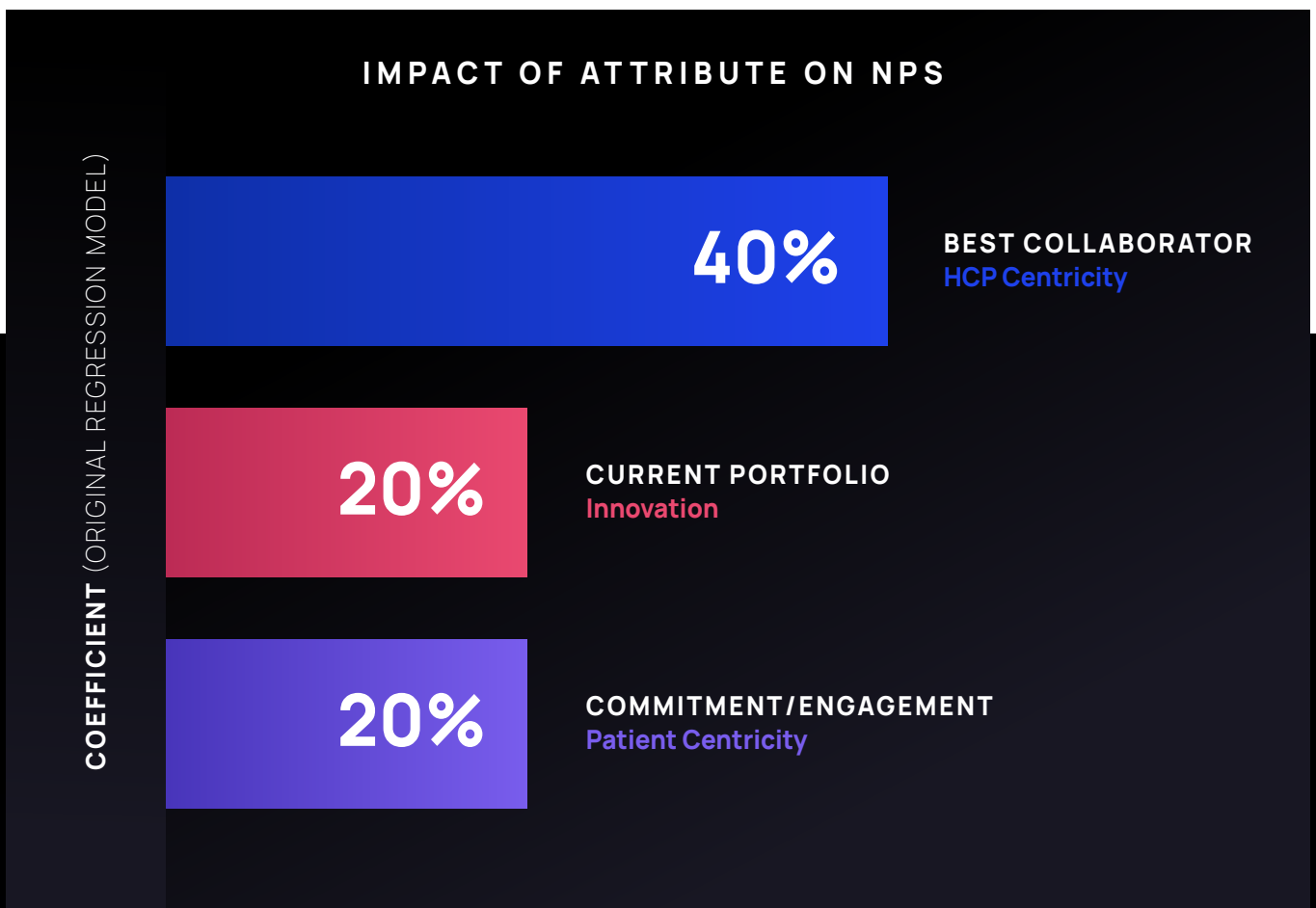
When we asked physicians which factors most influenced their perception of a manufacturer, they consistently ranked innovation and patient-centricity as the top priorities, with innovation correlating with the product portfolio. Reputation and HCP-centricity follow, with promotional efforts being the least important.

## HCP'S STATED IMPORTANCE

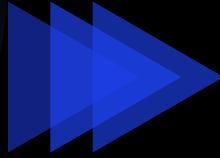


Yet, when we analyzed what truly impacted a physician's NPS score, the story shifted. HCP-centricity rose to the fore, with innovation and patient-centricity as the second and third strongest drivers.

In fact, improving collaboration with HCPs has double the impact on NPS scores compared to product portfolio strength or engagement with the vaccine community.



# 2025



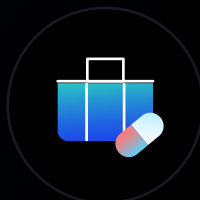
## What to *focus* on the coming Year?

Every vaccine manufacturer focuses on their product pipeline, developing promising new therapies and finding new indications for their existing products. Clearly, not only their portfolio, but the innovation within it affects their standing. Yet, manufacturers would be wise to also find ways to collaborate with and support their prescribers and their patients; those are the attributes that move the lever.

### 3 KEYS TO RETAINING VALUE WITH HCPS



Collaboration with HCPs



A strong product portfolio

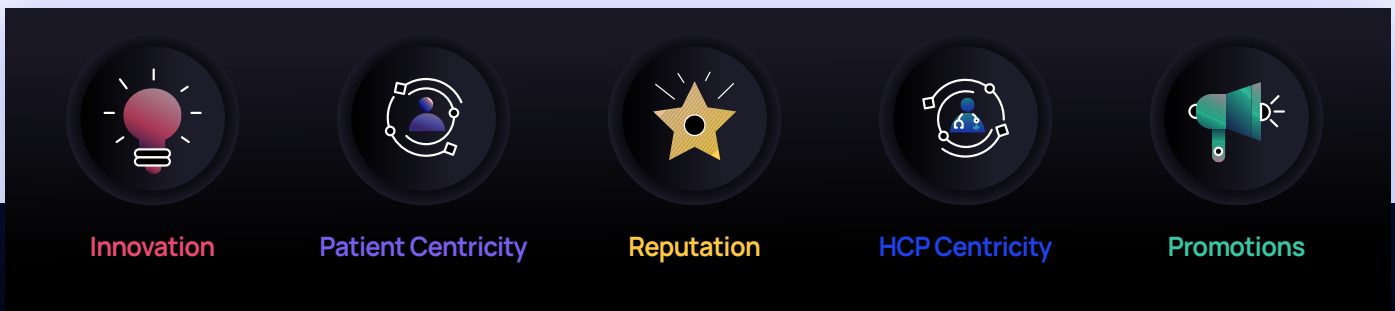


Commitment to the community

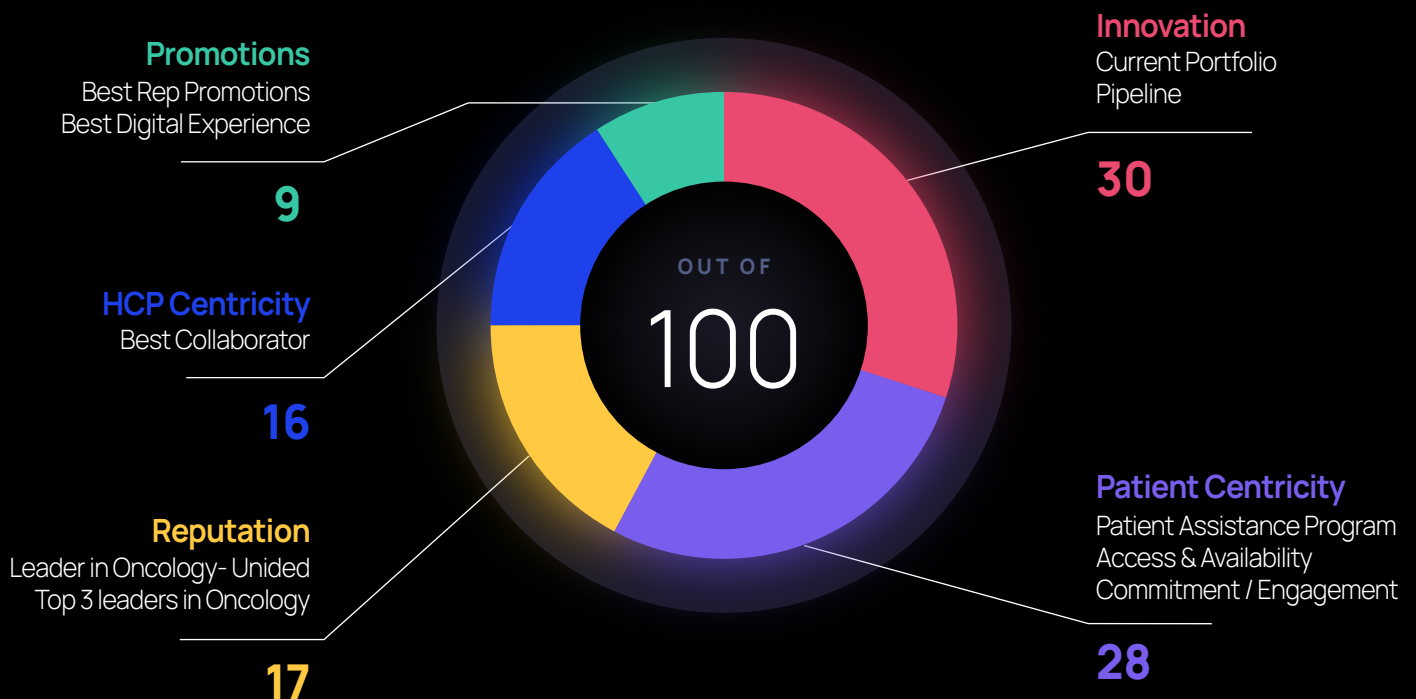
# Methodology

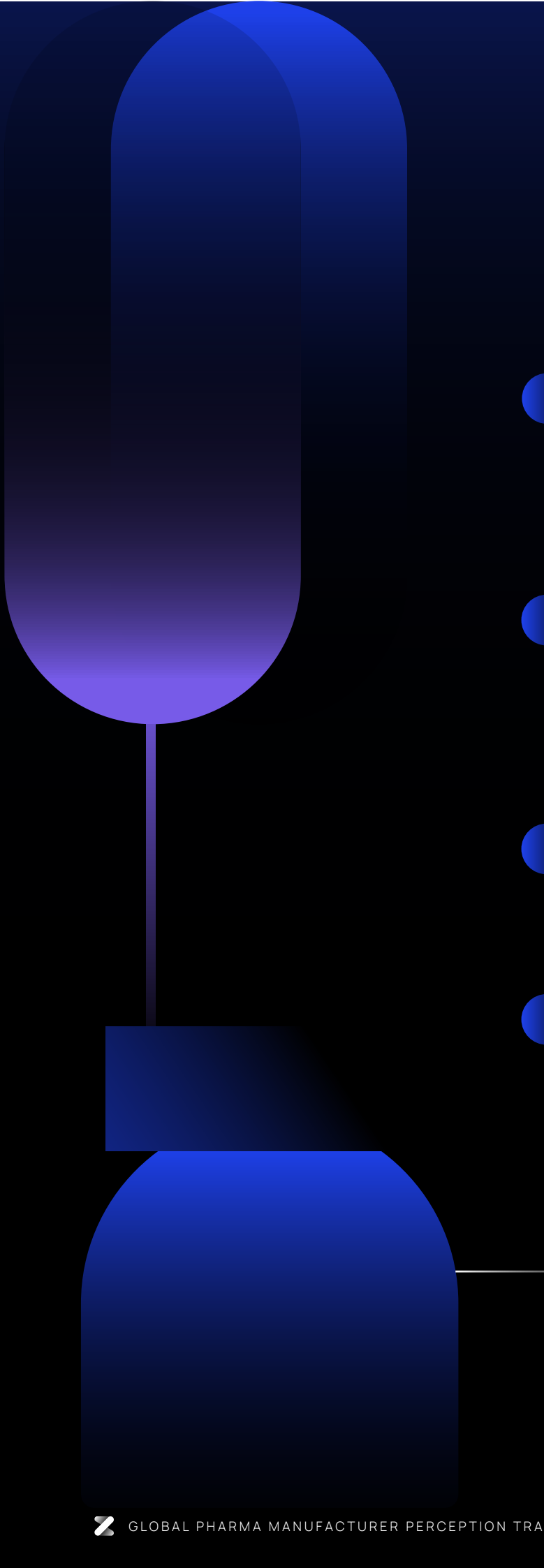
To gain a comprehensive understanding of HCP's perception of leaders in the vaccine space, ZoomRx conducted a quant-qual survey with more than 200 HCPs across 6 countries, including the United States, the United Kingdom, Germany, France, Spain, and Italy.

We assessed HCP's perception of each manufacturer across five dimensions, including:



By computing a score on a scale of 1 to 100 across these dimensions and applying weightage to each country based on its population-to-survey sample composition, we then ranked each manufacturer.





ZoomRx's annual Global Pharma Perception Report paints a comprehensive picture, detailing the ways HCPs view leading vaccine manufacturers. The full report answers key questions such as:

● Which manufacturers do HCPs see as the market leader?

● Which manufacturers have the most innovative and effective portfolios?

● Which manufacturers stand out for promotional quality?

● What can be done to enhance leadership perceptions?

FOR MORE INFORMATION,  
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## ABOUT ZOOMRX

**ZoomRx** is a global life science consulting firm. We provide strategic value across the product life cycle. Over 100 of the world's leading life science companies trust our approach, counting on insights from ZoomRx to guide their product strategies.

## ABOUT ZOOMRX'S TRACKERS

Customized **ZoomRx Trackers** provide the "so what" and "now what" for a brand, tailoring studies to meet specific brand needs, then weaving together actionable insights.

From promotional tracking to brand performance and chart audits, both pre- and post-launch, our global studies offer strategic recommendations that drive informed decisions and optimize brand performance.