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2025 Vaccine Trends: Key Insights for Pharma Marketers

With cold and flu season right around the corner, COVID-19 seeing an uptick, and other infections circulating in the U.S., vaccines are top of mind for healthcare providers (HCPs). Without a doubt, they'll be searching for up-to-date clinical information, learning about new vaccines, and positioning themselves as trusted partners for their patients. For pharma brand marketers, this is a pivotal moment to engage with HCPs and influence their choices.

Here, we explore the latest vaccine trends regarding uptake, barriers to care, and market growth, plus what HCPs are looking for this year. This insight can help pharma marketers tailor their strategies to meet the needs of clinicians and patients alike.

Vaccine Hesitancy on the Rise

Despite their efficacy, vaccine uptake continues to be a challenge for clinicians, particularly for those caring for pediatric populations. Parents may delay, be selective about, or refuse certain vaccines altogether.

The measles, mumps, and rubella (MMR) vaccine is one that has been a concern for quite some time. In 2000, measles was declared eliminated in the U.S. due to a highly effective vaccination program. Yet in recent years, U.S. vaccination rates have declined, while global measles activity has increased, spurring a resurgence in the U.S.

In 2022, 93% of kindergarten children were vaccinated, down from 95% just three years earlier—putting 250,000 children at risk each year.



Patients Need Reliable Information

Vaccines are one of the most hotly debated issues in healthcare, and there is plenty of misinformation, myths, and personal beliefs circulating. Among pediatric populations, low vaccine uptake is due to a host of factors such as:



Religion

The animal-derived gelatin and human fetal tissue used in the MMR vaccine is a commonly cited religious reason for vaccine refusal. There are 45 states and Washington D.C. that grant religious exemptions for vaccines, and 15 states that allow exceptions due to personal, moral, or other beliefs.



Misconceptions

Some parents refuse vaccines because they think kids should contract the disease and develop so-called natural immunity, or they believe their children are at low risk. Others worry about side effects and exposing their children to foreign chemicals.



Safety concerns

Family, friends, and social media influencers who proliferate misinformation and opinions about vaccine safety, or sensationalized news reports of rare adverse reactions, can sway parents to delay or avoid vaccines.

Trust in providers is critical to vaccine uptake, and parents are seeking reliable information. In fact, 85% of people say their personal physician is the most trusted source of information about the COVID-19 vaccine.

While parents want to talk to their children's providers, they're often hesitant out of fear of being labeled or judged. A 2022 survey found that one in seven parents didn't talk about vaccines with their children's regular physician within the past two years, and some parents delayed or missed visits entirely to avoid the conversation.

More than 50%
*of parents don't have enough
information about the effectiveness,
side effects, or safety of the COVID-19
vaccines period.*
—Kaiser Family Foundation



The Vaccine Market is Experiencing Rapid Growth

Vaccines continue to grow at a steady pace, representing a significant portion of pharmaceuticals. In 2023, the current market size was valued at \$23.8 billion and is expected to reach \$35.1 billion by 2030.

For pharma brand marketers, understanding these trends and the growing market can help in planning targeted campaigns and leveraging emerging opportunities. The industry is also seeing growth in certain therapeutic areas:



Influenza & COVID-19

Moderna has an influenza and COVID-19 combination vaccine in the pipeline. GSK also bought out their stake in an influenza and COVID mRNA vaccine candidate for \$429 million.



RSV

In 2023, AREXVY pulled in \$1.5 billion. In May, the FDA approved Moderna's mRESVIA, the first mRNA RSV vaccine for adults aged 60 and older. Estimates show the total market share for RSV vaccines is \$10 billion.



Shingles

GSK increased investments in Shingrix this year and committed \$2 million to increase adult immunization rates.



Pneumococcal

In 2023, Pfizer's Prevnar pulled in \$6.44 billion, and Merck recently received FDA approval for CAPVAXIVE.



HPV

In 2021, Merck's Gardasil vaccine brought in \$5.7 billion. The company estimates sales could double by 2030 and has invested billions in expanding production.



HIV

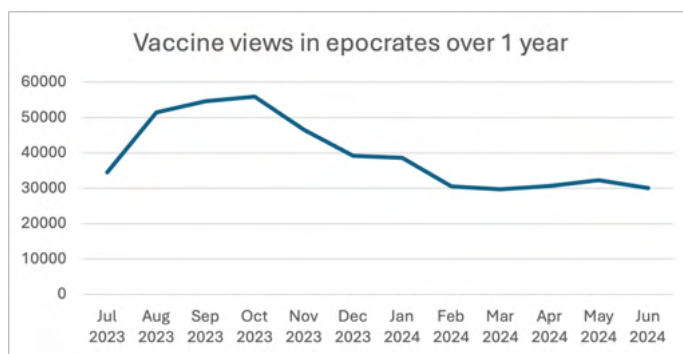
After two decades of clinical trial failures, an HIV vaccine is showing promising early results.

HCPs Are Seeking Vaccine Information in epocrates

With increased R&D and new vaccines and indications coming out all the time, clinicians are looking for accurate and reliable vaccine information, both at the point of care and outside of visits.

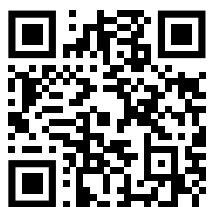
Over the past year, look-ups for RSV, shingles, pneumococcal, and HPV have dominated traffic for the vaccine therapeutic class. RSV drugs, in particular, have higher lookups between August and February, when incidence is higher. Since RSV vaccines have different indications and have been incorrectly prescribed in the past, providers are verifying indications and dosages.

There were 474,224 vaccine views in epocrates July 1, 2023 – June 30, 2024.



Clinicians are also researching uncommon vaccines such as Vivotif, indicated for typhoid fever, including adverse reactions, contraindications, and proper dosing.

With the fall season upon us, clinicians will continue to search for the latest clinical information about vaccines, ensuring they have the most accurate and up-to-date medical information. With over 1 million active platform users and 426,000+ drug lookups per day, epocrates is the trusted platform for clinicians seeking knowledge to support their professional decisions.



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