CIGNA INTERNATIONAL COVID-19 VACCINE PERCEPTION STUDY

Acceptance and Perception of Vaccine Continues to Improve **JULY 2021**

EXECUTIVE SUMMARY

This report, the third in the series, summarizes the key findings from Cigna's COVID-19 Vaccine Perception Study which aims to better understand perceptions and attitudes towards COVID-19 vaccines around the world. Key findings include:

- Vaccinations continue to grow steadily – in one month we saw the vaccination rate of our respondents increase from 25% to 31%, illustrating the success of vaccine rollout programs around the world.
- Attitudes to vaccination continue to improve – as vaccination programs have progressed, we have seen a steady increase in vaccine acceptance, in May 69% people agreed they would get the vaccine if it was offered to them, up from 63% in March.
- Fewer people are vaccine hesitant – the number of people waiting to get a vaccination until more people have had their first one dropped 8% in three months, from 50% to 42%.
- Notable differences between vaccinated and unvaccinated respondents remain – vaccinated respondents are significantly more likely to agree with the positives of vaccines.
- Top three reasons for being vaccinated: community spirit, hearing news about the vaccines and a desire to travel.

When we commissioned this research, many markets were in the early stages of their vaccination programs. We did not fully understand how people might perceive the vaccine and how that might impact rollout. Our first report showed that hesitancy was a real and present issue that needed to be addressed in order to ensure success.

The findings from our third COVID-19 Vaccine Perception Study highlight some incredible progress in vaccination programs around the world. While there is still much work to be done, the research illustrates how successful programs can have a positive effect on the perception of COVID-19 vaccines and their acceptance.

The data also points towards the challenges that lie ahead. There are still significant groups around the world that are hesitant about taking the vaccines. While these groups have reduced in size, and our research indicates we can expect them to reduce further, it will be incumbent on governments and health authorities to define new strategies for reaching those people to explain the benefits of vaccination. We will only achieve herd immunity by continuing to support and encourage vaccination programs.

In an earlier report, I said the progress we have seen is the result of the hard work and dedication of health care professionals. It is their commitment which is having a positive impact on how COVID-19 vaccines are perceived. Cigna salutes their continued hard work and dedication.

The pandemic has been unprecedented, with a series of complex effects we will be measuring and tracking for years to come. This research is designed to give us a window into the progress of vaccination programs and perceptions of the vaccines. I am therefore very pleased to report we have found people around the world are more positive than ever about the vaccines and have a greater belief in their efficacy. This should be celebrated as a clear sign of progress for life beyond the pandemic.

Jason Sadler, President, Cigna International Markets

METHODOLOGY

- Data collected between 12th – 20th May, 2021
- 13,092 respondents
- Aged 18 or over
- Markets: China, Hong Kong, New Zealand, Singapore, South Korea, Spain, Taiwan, Thailand, UAE, UK and U.S.
- 52% Male and 48% Female

ABOUT CIGNA

Cigna's mission is to improve the health, well-being, and peace of mind of those we serve by making health care simple, affordable, and predictable.

- **We make it easy to get care – letting you choose how, when, and where you want it – from virtual health, to specialist consultants.**
- **We make health care more affordable by partnering with providers who provide quality, cost-effective care.**
- **Our goal is to provide you with health care coverage that is predictable – every step of the way.**

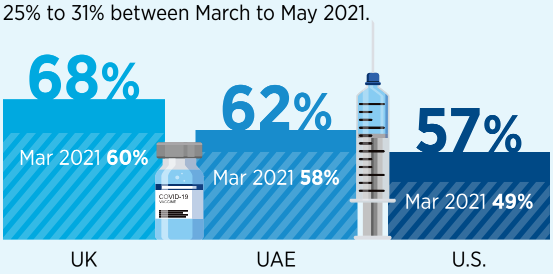
VACCINATON RATES CONTINUE TO GROW STEADILY

Our research shows that vaccination programs are continuing to make rapid progress. In just a month vaccination rates in the markets we surveyed increased from 25% to 31%. The markets with the highest vaccination rates continue to be the UK (68% up from 60%), UAE (62% up from 58%) and U.S. (57% up from 49%).

Markets which have seen a rapid increase include Singapore, a 13% increase (29% to 42%) and Spain, 12% increase (16% to 28%). Mainland China also saw an 11% increase (30% up to 41%) and has now administered over 1.2 billion shots[1].

HIGHEST VACCINATION RATE

Vaccination rates around the world increased from 25% to 31% between March to May 2021.



VACCINE ACCEPTANCE CONTINUES TO IMPROVE

As we saw in the last edition of our ***COVID-19 Vaccine Perception report***, the rate of vaccination has helped to drive a corresponding increase in vaccine acceptance, up from 63% in March to 69% in May. The progress has also been reassuringly consistent, with an increase of 3% between March and April (63% to 66%) and 3% from April to May (66% to 69%).

This improvement has been led by those markets where there has been a significant increase in vaccinations, such as Mainland China, Taiwan, Spain and UAE. In Taiwan 53% of people said they would get a COVID-19 vaccine if it was available to them, up from just 41% in March. In Spain, 78% of respondents agreed they would get a COVID-19 vaccine and in the UK, the most positive market, this number is now 88%, reflecting the more positive perceptions in European markets.

At the other end of the scale was Hong Kong where 28% said they would probably not accept the vaccine, highlighting that significant work is required if Hong Kong is to reach herd immunity.

[1] *Latest on the COVID-19 Pandemic*. ***China Daily***. http://global.chinadaily.com.cn/a/202106/30/WS60b58be4a31024ad0bac2b49.html Updated June 30, 2021. Accessed June 30,2021.

INFORMATION LEADS TO DECLINE IN VACCINE HESITANCY

We have seen vaccine hesitancy, or a "wait and see" approach to vaccination, drop significantly over the last three months. Back in March when we conducted our first wave of research, 50% of respondents wanted to wait to get a vaccine, this reduced by 3% in second round in April and declined a further 5% to reach 42% in May. These overall numbers hide some examples of markets where there was very rapid progress on this measure, these markets include Mainland China which was down 17%, Singapore 13%, Taiwan 11% and Spain 11%. On the other end of the spectrum is South Korea, with 52% of respondents still waiting to see at the end of May, a decline of just 2% since March.

There was more good news in terms of people's understanding of COVID-19 vaccines, the percentage of respondents claiming to not know enough about the vaccines dropped from 41% in our second wave of research to 38% in May. In a number of markets there was a correlation with improved knowledge and a reduction in hesitancy, for example New Zealand saw an 8% reduction in the number of people who did now know enough about the vaccine and alongside that a 7% reduction in the number of people who were going to wait for more people to get a vaccine first.

NOTABLE DIFFERENCES BETWEEN VACCINATED AND UNVACCINATED

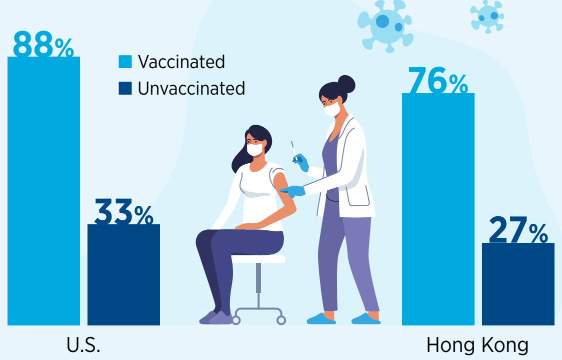
Across all markets, there are notable differences of opinion between the two groups. Both vaccinated and unvaccinated people had similar levels of anxiety about contracting COVID-19 (54% and 57% respectively) and transmitting it to others (73% versus 75%). However, perceived risks of side effects and safety, as well as a lack of access, were stopping uptake of vaccines for those still unvaccinated. Globally, 9% of all those yet to receive a vaccine were adamant that nothing could persuade them to take a COVID-19 vaccine.

Some markets are now facing the final few hurdles on the drive to herd immunity however, as vaccine programs continue, these hurdles start to get higher. At the beginning we saw enthusiastic groups rush to access vaccines as early as possible. As the rollout has progressed, gradually the more reluctant members of society are being offered vaccination and many will require more persuasion than their earlier, more eager counterparts. Governments and policy makers need to take this into account when continuing the drive for vaccination and adjust their strategies and communications accordingly.

The largest gulf in opinion between those who have been vaccinated and those who have not, relates to the perception of whether COVID-19 vaccines are safe. In the U.S. 88% of those who have been vaccinated believe the vaccine is safe, compared to just 33% of the unvaccinated, a difference of 55%. And the U.S. is not alone in facing this challenge, in Hong Kong 76% of those vaccinated believe it's safe, but only 27% of the unvaccinated believe the same thing. This illustrates how views on the safety of the vaccines is diverging in part driven by the growing numbers of people being vaccinated. It also points to the need for more information and evidence sharing to support the safety of the vaccines.

VACCINATION SAFETY PERCEPTION

Vaccinated respondents are significantly more likely to agree the vaccines are safe.



PERCEPTIONS OF THE UNVACCINATED

To forecast how quickly vaccination rates might continue to rise, we can look at consumers who have not yet been vaccinated and their attitude towards getting vaccinated. From April to May, levels of unvaccinated consumers wanting to get vaccinated remained generally stable, only Taiwan (from 41% to 52%) and New Zealand (from 65% to 67%) saw an increase in willingness to get vaccinated.

There is general consensus that those who are unwilling to be vaccinated are an obstacle to achieving the objective of herd immunity, generally set at 70% or greater vaccination rate in a population. We have found that this challenge is different across markets, however there were only three markets where more than 10% of people said nothing could persuade them to get a vaccine. These were the UK, Hong Kong and the U.S. In Hong Kong, out of the 82% of unvaccinated respondents, 12% stated they cannot be persuaded to get the vaccine, the UK had a similar rate, but 68% of respondents are already vaccinated. In the U.S., 57% of people are vaccinated, but 30% of those who are unvaccinated, assert that nothing can persuade them to get the vaccine, by far the highest rate. At the other end of the spectrum are mainland China, Spain and Singapore, where only 5% or less of those who are unvaccinated cannot be persuaded to get a COVID-19 vaccine.

Of course, as with any vaccination, there will always be those who are unwilling to receive it for a number of reasons, for example concern about pre-existing health conditions. What we have seen in the latest set of results, is there are opportunities to help build vaccine confidence among the remaining unvaccinated people. Understanding why people feel the way they do about vaccination, can ensure that we meet them where they are by providing the information they lack and sharing sources that they deem trustworthy and accessible, ultimately helping to move the needle on vaccine acceptance.

GOVERNMENT BODIES MOST TRUSTED

Across all markets and all generations, the findings show that the two most trusted sources for vaccine information continue to be government bodies, and providers. Compared to unvaccinated respondents, vaccinated respondents are more likely to trust information from government bodies (63% vs. 73% respectively), providers (57% vs. 66%), private health care insurance providers (38% vs. 43%) and their employers (8% vs. 10%).

In contrast, unvaccinated people are more likely to trust information from TV news, friends and family, journalists and social media than those who have been vaccinated. Understanding which sources of information are trusted by the people who remain unvaccinated will help governments and health authorities ensure information campaigns are more targeted. For example, in Hong Kong, unvaccinated people trust family providers most, while in South Korea their second most trusted source is TV news.

Across all three of our reports the understanding that up-to-date information regarding the vaccines is important has remained consistently high, with 78% of people agreeing this is important, this has increased by just 1% in three months. Our findings also continue to show that despite the perception that social media would have a widespread negative influence, overall only 5% of people chose social media as their most trusted source of information on COVID-19 vaccines.

SUMMARY OF KEY FINDINGS

VACCINATION RATE UP
In one month we went from **25%** of respondents vaccinated to **31%**, a significant increase that illustrates the success of the vaccination programs around the world.

COMMUNITY SPIRIT THE KEY DRIVER
Among those vaccinated the top reason that persuaded them to get vaccinated was a 'sense of community spirit and a duty to society'.

GOVERNMENT BODIES MOST TRUSTED
Overwhelmingly people continue to trust government bodies, with **41%** of people choosing government bodies as their most trusted source of information on vaccines, twice as high as the next most trusted source (GPs 19%).

MORE PEOPLE BELIEVE THE VACCINE WILL BE AVAILABLE TO THEM
63% of people now believe the vaccine will be readily available to them, an increase of **5%** since March.

VACCINE HESITANT GROUP SMALL MINORITY
In most markets the group of people who said nothing could persuade them to get a vaccine is under **10%** and includes those with medical conditions.

CIGNA IS HELPING PEOPLE MANAGE THEIR MENTAL HEALTH DURING THIS STRESSFUL TIME

The sustained nature of the pandemic, and the shift it has caused in the fundamentals of how we live and work, presents a major challenge to employers in terms of how they support their employees' health and well-being.

At Cigna International, our stress care hub offers expert advice on financial, workplace and family stress; interactive webinars with global partners; and educational visualization technology on the effects of prolonged stress. This hub is constantly growing and, as this research evolves, we will continue to incorporate these insights into our stress assessment tools.

We also have a strong network of mental wellness and specialist experts who are well-positioned to help people create their own stress care plans. All content is free of charge and available to individuals and employers.

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