

Talking to employees about vaccine hesitancy

Survey of American employee attitudes towards the COVID-19 vaccine

March 2021

Survey methodology

To understand the reasons for vaccine hesitancy and determine the messages that can move people to acceptance, Buck commissioned Leading Indicator Systems to conduct and analyze the results of a nationally-representative online survey of 820 full-time workers employed by companies with at least 20 employees between February 25th and March 1st, 2021.

Our analysis revealed the existence of five segments of American employees, each with their own persona vis-a-vis vaccination, and each with their own set of communication needs. This paper reports the results of the study in terms of each segment's demographics and the messages that resonate best with them.

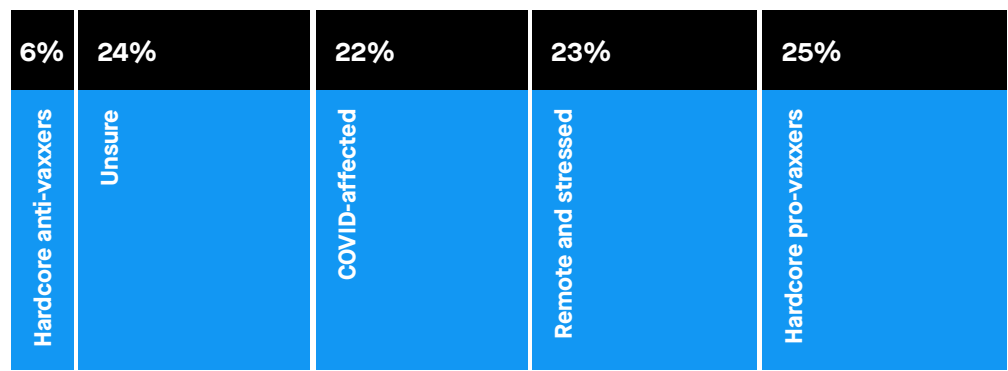


Executive Summary

Despite the epidemiological, economic, and societal imperatives for getting American employees vaccinated against COVID-19, many are hesitant or opposed to it for themselves.

Our analysis reveals the existence of five segments of American employees, each with their own persona vis-a-vis vaccination, and each with their own set of communication needs. The five personas fall along a continuum illustrated below.

Employee attitudes to the COVID-19 vaccine



Key findings

- The survey found 30 percent of respondents are opposed to vaccination, representing a 10- percentage point improvement since the prior wave conducted in December 2020, which found a figure of 40 percent.
- The most important segment from a communications perspective is the segment referred to as the unsure. The unsure contains the majority of those opposed to vaccination despite representing less than one-quarter of the employee population.
- Unlike hardcore anti-vaxxers, the opposition of the unsure is not absolute, suggesting that a substantial proportion are “moveable” through the right messages delivered from the right sources.
- Demographically, this segment is disproportionately likely to be non-White, female, lower income, non-management, and working full-time in a non-office company location, with little-to-no customer contact.
- Complicating outreach to the unsure is the fact that they hold negative perceptions of their employers:
 - Majorities (58%) don’t trust senior management to look out for their best interests, believe that their company takes unfair advantage of workers (51%), and that the pay gap between leadership and workers is too big (67%).
 - Nearly half (45%) feel that leadership’s commitment to social justice is insincere, and that they are subjected to stereotypes at work (42%).
 - Two in five (42%) believe that leadership is out of touch with the reality workers have experienced under COVID.



What messages will be most impactful when talking to employees

- The best performing message for the unsure is “knowing that being vaccinated would improve the safety of my family and friends.” This is the only segment for which this is the top message.
- Hardcore anti-vaxxers and hardcore pro-vaxxers are largely resistant to messaging because the former are largely resistant to influence, and the latter because they will get vaccinated at the first opportunity without needing any external prompting.
- The COVID-affected segment, a persona composed largely of overwhelmed male managers distracted by childcare responsibilities at home, represents a different type of communications challenge. Despite their readiness to be vaccinated in principle, a majority of this segment intends to wait for their preferred choice of vaccine due to perceived differences in efficacy. Accordingly, their top message is assurance that the vaccine will be effective against all known variants, a claim that unfortunately cannot yet be made without further data. The next most impactful statement is that there are no out-of-pocket costs for vaccination, followed by messaging that promotes the importance of protecting one’s family and friends.
- Like the COVID-affected segment, the remote and stressed segment will be most swayed by messaging around vaccine efficacy and protecting one’s family and friends.

Survey of American employee attitudes towards the COVID-19 vaccine

It's easy to imagine that all Americans are eagerly anticipating their chance to be vaccinated against COVID-19. It's not quite so simple. This survey reveals an American workforce sharply divided on vaccination issues.

The good news is that our research shows that much of the American workforce can be swayed to get vaccinated if they receive the right information in the right way.

When asked when they would be comfortable getting vaccinated, nearly one-third (30%) of American employees said that they plan to "wait and see what happens with others," a more cautious approach than might be expected in light of a half million lives lost.



Astonishingly, roughly two in five American workers report at least some anti-vaxxer sentiments, with fully 40 percent agreeing that they are "opposed to vaccinations in general" and "don't trust the government's oversight of this vaccine." One third believes that the vaccine is "not worth the risk," and 30 percent want to wait and see what happens with others before getting vaccinated. Far fewer, less than one quarter, admit that they might not be well informed about the details of COVID vaccines, suggesting that many anti-vaxxers will not be open to appeals from government or employers. They believe they know better.

Another concern is the prevalence of "brand consciousness" when it comes to vaccination. More than half of American employees (52%) agreed that they are "waiting for their preferred choice of vaccine" from among the Pfizer, Moderna, J&J, and Oxford/AstraZeneca options, in defiance of Dr. Fauci's dictum that the best vaccine is the one that is available.

There are also practical considerations in terms of time and money.

Despite the fact that COVID vaccinations are free, 55 percent believe there is an out-of-pocket cost for getting vaccinated, with the median cost estimated at \$7. Fully one-quarter believe this cost will be substantial, at either \$60 or more.

In terms of time investment, the median estimate for time away from work is two hours, although the top quartile believe it will take six or more hours.

Vaccination resistance can be changed for many (but not all)

Because of the high prevalence of misconceptions about the vaccines and the process of vaccination, we evaluated the potential of ten statements that, if communicated, might move hesitant employees closer to vaccination.

Results indicate that the most impactful message overall relates to effectiveness of the vaccines against all known variants, a claim that unfortunately cannot yet be made without further data and was therefore excluded from subsequent analyses. The next most impactful statement concerns the fact that there are no out-of-pocket costs for vaccination, a testament to the pervasiveness of the cost misconception. The third most impactful statement emphasizes the protection conferred to one's family and friends.

In order to identify the smallest set of messages with the greatest impact, we conducted an analysis on the ability of different messages to penetrate and activate the overall population.

Our analysis revealed that the optimal combination of messages begins with no out-of-pocket costs and protection of family/friends, which together reach the majority (56%) of the population, with incremental gains supplied by having more information about the vaccine and the process, having paid time off for vaccination, and the knowledge that there is only a small risk of side effects.

An important component of this analysis is the identification and sizing of the population that cannot be reached by any of these messages, which we label the unmovables. For the overall population, 12 percent are “unmovable.”

Four strategies to combat employee COVID-19 vaccine hesitancy with targeted messaging

1.

Address practical issues

- a. Compile easy-to-follow information to educate employees
- b. Promote resources, like information about local vaccination events and other resources

2.

Remove concerns about cost

- a. Remind employees that there is no cost associated with the vaccine
- b. Promote your support to offset other costs (paid time-off, incentives etc.)

3.

Reduce fear about the vaccine experience

- a. Remind them about the down-side or potential consequences of not taking action
- b. Promote examples where people they know and trust have received the vaccine

4.

Tackle mistrust and misinformation about the COVID-19 vaccination head-on

- a. Share information that directly targets common concerns and misconceptions
- b. Promote credible resources

Survey findings

Five employee segments

The findings above address the overall population-level findings. But it is important to note that these trends vary substantially by different segments of the population, presenting employers with complex communication challenges. For this reason, we conducted a segmentation analysis, breaking down the population into clusters of similar attitudes, beliefs, and behavioral intentions.

Five segments emerged from this analysis representing a continuum of vaccination readiness, from hardcore anti-vaxxers to those most eager to get the next available vaccination appointment, with the “movable middle” populated by subgroups who are uncertain, already COVID-affected, or socially isolated.

1. Hardcore anti-vaxxers – tough customers

Beginning with the “toughest customers,” the hardcore anti-vaxxer segment represents a particularly vexing paradox of having a very high risk of COVID infection and a strong skepticism of institutions. Fortunately for employers, this segment is relatively small at six percent of the total workforce.

Demographics

This segment is more likely to be non-White, female, lower income, and to believe that their health is worsening.

A fair-share analysis shows that despite representing only six percent of the population, they represent 26 percent of vaccination refusers and 42 percent of those who believe that COVID vaccines “aren’t worth the risk.” Their rationale can be traced to distrust of government, among other institutions; they represent 19 percent of those who “don’t trust government’s oversight of COVID vaccines.” Nearly 70 percent are “opposed to vaccinations in general.”

Consistent with their distrust of institutions, the emotional assessment reveals that this segment is distinguished by feelings of disempowerment and a need for a higher purpose. As evidence of this segment’s intractability, nearly half (44%) are “unmovable,” i.e., they cannot be influenced by any of the ten tested messages, a level four times higher than the population overall.

Effective messaging strategies

In keeping with their distrust of vaccinations, the message that works best in attempting to influence this segment is “knowing that people like me have successfully been vaccinated.”

Their intransigence is also reflected in their out-of-pocket cost and time away from work estimates.

- Sixty-three percent estimate their cost at zero dollars, reflecting their intention to not be vaccinated at all. When the zeros are excluded, their median cost estimate rises to \$50.
- A corresponding pattern is evidenced in this segment’s modal time estimate of “zero hours” (i.e., it won’t take any time because they won’t submit to vaccination). When the zeros are excluded, their median time estimate rises to an astounding 24 hours away from work, the largest of any segment by a factor of five.
- Forty percent question the motives of their employer in

wanting them to be vaccinated, a rate more than double the average, suggesting that they view their employers as being more concerned with protecting their productivity than genuinely concerned for their wellbeing.

Segment profile

As is often the case with subgroups holding similar attitudes and beliefs, their work circumstances provide essential context for understanding their worldview. This segment is disproportionately likely to have been classified as “essential workers” (67%), non-management (52%), and working full-time in a non-office (65%) company location (63%), with no customer contact (31%).

They are twice as likely to work in a warehouse (17%), factory (12%), mobile setting (8%), or outdoors (6%) than average, and twice as likely to work in transportation/warehousing (10%) and retail/wholesale (15%) than average.

Health profile

There are additional clues to this segment’s reluctance to be vaccinated in their health profile. They are nearly twice as likely to use little to no healthcare services (44%). They are also more likely than average to have tested negative for COVID, have no complicating conditions for COVID, and have not experienced a death from COVID in their social circle, which distances them from awareness of COVID risks.

2. The unsure – the untrusting majority

The unsure represents the other strongly anti-vaccination segment. This is a large segment of the workforce representing one-quarter of the population and the majority of vaccine refusers; consequently, this is the largest opportunity segment for interventions toward vaccination. In contrast to the first segment, nearly half of this segment (43%) is “not sure” if they’ll get vaccinated, leaving open the possibility for positive interventions.

Demographics

This segment is more likely to be non-White, female, lower income, and to believe that their health is worsening.

A fair-share analysis shows that despite representing 24 percent of the population, they represent 57 percent of vaccination refusers and 49 percent of those who believe that COVID vaccines “aren’t worth the risk.”

Unlike the first segment, the unsure trust government oversight

(representing only half their fair share of government skeptics). Instead, they don't trust their employers, as evidenced by their disproportionate share of those who feel that company leadership doesn't understand what it's been like for employees during COVID or what they need.

Effective messaging strategies

Consistent with their distrust of employers, the emotional assessment reveals that the unsure are distinguished by feelings of injustice and disempowerment. In stark contrast to the first segment, the vast majority (89%) of the unsure are not opposed to vaccinations in general. And the single best performing message for this segment is an appeal to protecting loved ones: "knowing that being vaccinated would improve the safety of my family and friends."

Like the hardcore anti-vaxxers, the hesitation of the unsure is reflected in their out-of-pocket cost and time away from work estimates.

- Sixty-one percent estimate their cost at zero dollars, reflecting their intention to not be vaccinated at all. When the zeros are excluded, their median cost estimate rises to \$30.
- Twenty-three percent estimate "zero hours" (i.e., not getting vaccinated won't take any time), and when the zeros are excluded, their median time estimate rises to five hours away from work, a figure only slightly higher than the three pro-vaccination segments.

Segment profile

This segment is disproportionately likely to be non-managers (66%), and working full-time in a non-office company location (57%), with no customer contact (27%), however, they are less likely than average to be designated as "essential workers" (45%). They are more likely to work in healthcare (13%), manufacturing (10%), K-12 education (8%), and government (6%).

Health profile

There are additional clues to this segment's reluctance to be vaccinated in their health profile. They are more likely to use little to no healthcare services (31%). They are also more likely than average to have tested negative for COVID (88%), have no complicating conditions for COVID (83%), and have not experienced a death from COVID in their social circle (75%), distancing them from the consequences of COVID.

3. The COVID-affected – it's worth the risk

The COVID-affected is another large segment of the workforce representing nearly one-quarter (22%) of the population. This group does not trust government or vaccines in general, although they are willing to make an exception for the COVID-19 vaccine.

Demographics

This segment is more likely to be White, male, with higher income, and a bit younger. A fair-share analysis shows that despite representing 22 percent of the population, they represent 37 percent of those who believe that COVID vaccines "are worth the

risk." Like the first segment, the majority of the COVID-affected do not trust government oversight.

The most striking characteristics of this segment are strong majorities of caregivers (85%), primarily to young children, as well as having tested positive for COVID (60%) and having a potentially complicating condition for COVID (73%). Fortunately, two-thirds (68%) say their health is getting much better (presumably, following their illness).

This is the segment most likely to have lost someone close to them to COVID, bringing the consequences of COVID up close.

Effective messaging strategies

Consistent with feeling trapped by caregiving duties under COVID, the emotional assessment reveals that this segment has a strong need to express their individuality. Like the anti-vaxxer segment, the vast majority (74%) of the COVID-affected are opposed to vaccinations in general, yet, having experienced COVID infection, they are willing to make an exception; in fact, they are among the highest segments in terms of believing that they are well-informed about COVID vaccines. They believe they've "done their homework," and have concluded that the vaccines are safe enough.

Although they need little persuading, the single best performing message for this segment is an appeal to efficacy of the vaccine, followed by protecting loved ones.

Reflecting their focus on efficacy, the majority of this segment (53%), more than twice as likely as others, say that they are waiting for their preferred choice of vaccine (Pfizer, Moderna, J&J); accordingly, this segment should be targeted with Dr. Fauci's message that "the best vaccine is the one that's available."

Like the hardcore anti-vaxxers, the COVID-affected dramatically overestimate the out-of-pocket cost of vaccination (\$50 median) but estimate a more realistic time required away from work (four hours median).

Segment profile

This management-heavy segment is disproportionately likely to have "constant" customer contact (40%) and to be considered "essential." The majority of this segment works in white collar industries, either information services and software (36%) or banking, finance and insurance industries (28%). Nearly half (46%) are working remotely from home while trying to care for their children. Accordingly, they are the segment most likely to say they are working longer hours, working harder than ever, and are having trouble turning work off (38% to 49%).

Health profile

There are additional clues to this segment's eagerness to be vaccinated in their health profile. They are the segment most likely to use "significant" healthcare services (48%) and to trust the health care delivery system "completely" (60%).

4. Remote and stressed – isolated and disconnected

Remote and stressed is another large segment of the workforce representing nearly one-quarter (23%) of the population. The distinguishing characteristics of this segment are similar to the COVID-affected, i.e., relative social isolation (41% are working remotely from home; 33% say they feel disconnected from coworkers) with intense caregiving responsibilities.

Demographics

This segment is more likely to be White or Asian, male, higher income, and a bit younger, as well as more likely to work in upper management. Like the COVID-affected, this segment has a majority of caregivers (68%), primarily to young children, but is no more likely than average to have tested positive for COVID or to have a potentially complicating condition for COVID.

This is the segment second most likely to have lost someone close to them to COVID (46%), sensitizing them to COVID risks. Nineteen percent of this segment reports an unmet need for childcare and 24 percent say their home is not emotionally supportive, tied with the COVID-affected as the highest of any segment.

A fair-share analysis shows that despite representing 23 percent of the population, they represent 29 percent of those who plan to get vaccinated as soon as it's available.

Effective messaging strategies

Consistent with the COVID-affected, the emotional assessment reveals that this segment has a strong need to express their individuality. As evidence of this segment's openness to vaccination, only six percent are "unmovable." Although they need little persuading, the single best performing message for this segment is the appeal to efficacy of the vaccine.

Like the COVID-affected, the remote and stressed segment tend to overestimate the out-of-pocket cost of vaccination but at a much lower figure (\$23 median) and estimate a more realistic time required away from work. Their median time estimate is three hours away from work.

Segment profile

This segment is disproportionately likely to be in upper management (27%) but non-essential; they are also more likely to work in white collar industries, either information services and software (23%) or banking, finance, and insurance industries (20%). Nearly half (41%) is working remotely from home while caring for children.

5. Hardcore pro-vaxxers – informed consumers

Among hardcore pro-vaxxers, 90 percent strongly favor vaccinations in general, and 99 percent say they will be vaccinated against COVID as soon as possible. This is the segment most likely to strongly believe that they are informed consumers of the COVID vaccine (56%). Fortunately for employers, this is a large segment of the workforce representing one-quarter of the population (25%) and needs no special incentives or encouragement.

Demographics

Demographically, this segment is more likely to be White or Hispanic, female, middle income, and to be in "very good" health.

A fair-share analysis shows that despite representing 25 percent of the population, they represent 43 percent of those who believe that COVID vaccines "are worth the risk."

Effective messaging strategies

The emotional assessment reveals that as a result of social isolation, this segment has a strong need for social connection and relief from boredom. As evidence of this segment's relative openness to vaccination, only five percent are "unmovable." Although they need little persuading, the single best performing message for this segment is the appeal to vaccine efficacy, followed by protecting loved ones. They are the segment with highest intention to not wait for a preferred brand of vaccine.

The enthusiasm of the pro-vaxxers is reflected in their out-of-pocket cost and time away from work estimates. Sixty-eight percent estimate their cost at zero dollars, reflecting greater knowledge that the costs are covered by the Federal government. Their median time estimate is two hours away from work, the lowest of any segment.

Segment profile

Like the first segment, this segment is disproportionately likely to hold non-managerial positions (56%) and to be trained professionals (24%), with little-to-no customer contact (23%); they are also less likely than average to be designated as "essential workers" (49%). They are less likely to have caregiving responsibilities at home, and the segment most likely to work in healthcare (14%).

Conclusion

Different vaccine messages are needed for these different segments

The sharp differences between these segments (or, personas) makes it clear that employers will benefit from adopting a segmented view of their workforce. Not only are these five groups of employees vastly different in their intent to be vaccinated, they also are responsive to different messages.

Fortunately, there is a way to apply this segmentation to any workforce, giving companies a tremendously enhanced level of strategic understanding and control to help ensure maximum vaccination rates among the workforce:

- 1. Run a rapid vaccine pulse survey** – An ideal survey can provide you with a profile of your population, comparisons to national norms, and identification of the optimal messaging to reach your workforce.
- 2. Deploy a vaccine microsite** – A microsite integrated with your benefits portal can provide the critical vaccine information needed to address the issues and concerns that this national employee study showed employees are most worried about.
- 3. Develop and deliver the optimal messaging to your workforce** – A highly effective, corporate-branded, and targeted information campaign should be deployed rapidly to address your workforce profile with optimal messaging.
- 4. Model the vaccine trajectory for your workforce** – This can help measure the success of your efforts, inform your return to work strategy, and let you better understand the impact on your health plan.
- 5. Provide vaccine tracking** – A mobile app or website can allow self-attestations from employees for those offering incentives or mandating the vaccine.

For more information

Many employers want to adopt a vaccine promotion information campaign to provide some level of protection against transmission of the virus among employees in the workplace.

We can work with you to implement a very brief pulse survey (just five questions) with your employees that will accurately classify each of your employees into one of the five segment groups, allowing you to step back and strategically plan either segment-targeted or combined messages and interventions that speak directly to the needs, beliefs, feelings, and inclinations of each employee. This is a proven approach that can dramatically improve results.

To learn more contact us at **1 866 355 6657** or talktous@buck.com

About Buck

Together with our clients, we're defining a new social contract — a mutually beneficial agreement between individuals and organizations where both parties are rewarded for their contributions toward achieving optimal personal and organizational performance.

Our creative digital, consulting, and tech-enabled administration solutions focus on creating a culture of wellbeing, centered around the evolution of each person's health, wealth, and career. This empowers the world's most forward-thinking companies to embrace the new social contract, re-energize their workforces, and adopt an analytics-led talent marketplace in ways that improve how their people work and live.

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