Capturing moods during a pandemic

22 April 2021:
An omnibus survey in the UK and USA

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Executive summary

- We conducted an omnibus survey on **~500 general population** in each of the **UK** and **USA** to understand consumers' responses and preferences in light of the various **COVID-19 vaccinations** available to the market. The study also includes trending data of the pandemic's impact on consumer behaviour.
- We used **conjoint analysis** to mirror a similar survey conducted by Leng *et al* (2020)(1) in China (with some modifications to attributes) to uncover which characteristics of a **COVID-19 vaccine** consumers care about the most. The original Chinese study covered **Vaccine effectiveness**, **Vaccine related side-effects**, **Access to vaccine**, **Number of doses**, **Vaccination sites**, and **Duration of vaccine protection.** The **Conjoint.ly** study aimed to mirror these attributes and levels; however, we made the following changes**:**
  - We removed **"Vaccination sites"** as an attribute as the levels did not translate to the **UK** and **US healthcare systems**. We instead opted for a separate **Likert scale** question: "*How important is it to you that you get vaccinated at a major medical centre (e.g. hospital) versus a community medical centre (e.g. neighbourhood clinic)?"* to gauge respondents' preferences.
  - We removed the **"Voluntary"** and **"Compulsory"** levels from the attribute **"Access to vaccine"** as results would not be accurate in conjunction with cost. Instead, we asked respondents to choose between **"Subsidised"** and **"Unsubsidised"** in relation to their preferred access to the vaccine.
- **Leng et al (2020)** found "…a **higher probability of vaccinating** [in China] when the vaccine was **more effective**; **risks of serious side effects were small**; **vaccinations were free and voluntary**; the fewer the number of doses; the longer the protection duration; and the higher the proportion of acquaintances vaccinated."
- Unsurprisingly, in the Conjoint.ly study, we found some **similar results: high vaccine effectiveness, low risk of side effects** and a **long period of protection** are consistently the **most important factors** across **UK and USA** in terms of **increasing acceptance of vaccination**.
- **However, compared to UK and USA, Chinese consumers were receptive** to improvement in vaccine attributes (e.g. lower probability of side-effects). This may suggest that vaccine hesitant consumers in the **UK**, but especially the **US**, hold firmer reservations against the vaccine beyond these attributes, such as social and political views.
- **Improving vaccine effectiveness** and **offering subsidised/free vaccine** are the most likely factors to encourage **vaccine hesitant consumers** in the **UK and USA**. In the **USA**, vaccine hesitant consumers also care that their **acquaintances** have received the same vaccine (more so than non-hesitant people).
- Generally, **messaging about vaccine effectiveness and free access** are most likely to increase acceptance of the vaccine among hesitant people in the US and UK.

(1) Leng, A., Maitland, E., Nicholas, S., Liu, R., Wang, J. and Wang, S., 2020. Individual Preferences for COVID-19 Vaccination in China. *SSRN Electronic Journal*, [online] Vaccine 39, pp.247-254. Available at: <https://bit.ly/3v4K2aO>.

Sample characteristics

Consumer profile: We surveyed general population in the UK and USA

Criteria for consumers

- Located in the UK and USA
- General population, matching gender, age, and income to census
- Surveys conducted from 31 March 2021 – 5 April 2021

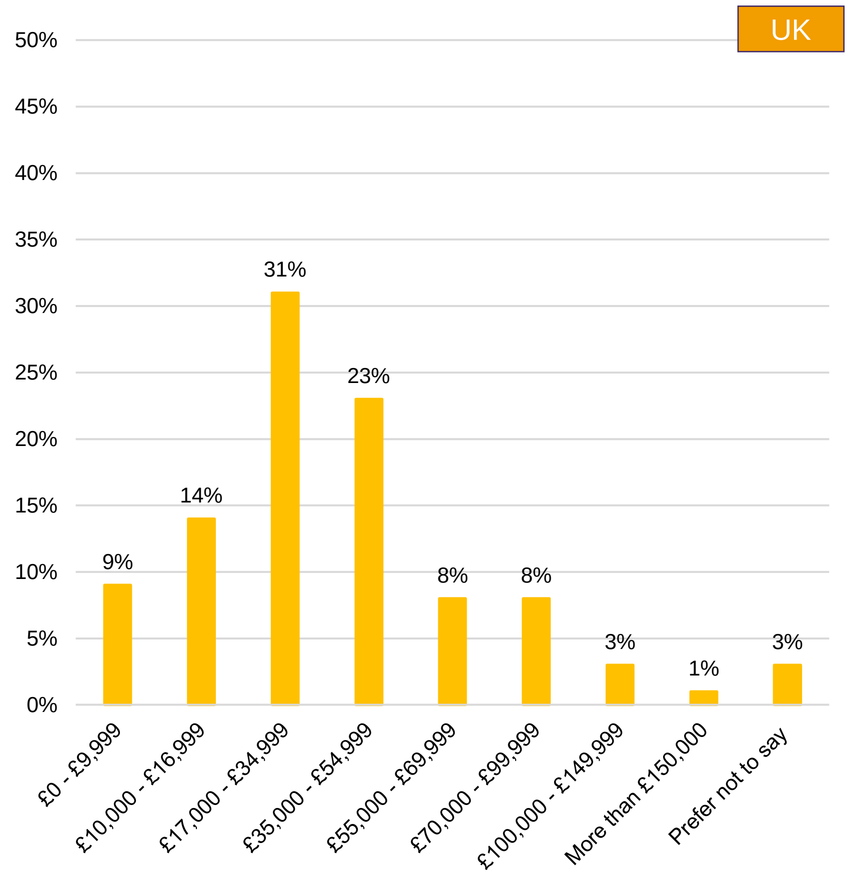
All responses	UK total sample size (N: 500) % in sample	USA total sample size (N: 502) % in sample
Age		
15-24	11%	12%
25-34	19%	18%
35-44	18%	24%
45+	52%	46%
Gender		
Male	41%	47%
Female	59%	52%
Other	0%	1%
Primary grocery shopper		
Primary shopper	71%	73%
Shops equally	26%	19%
Non-shopper	3%	7%
No answer	0%	1%

%s in this report are out of the total sample.

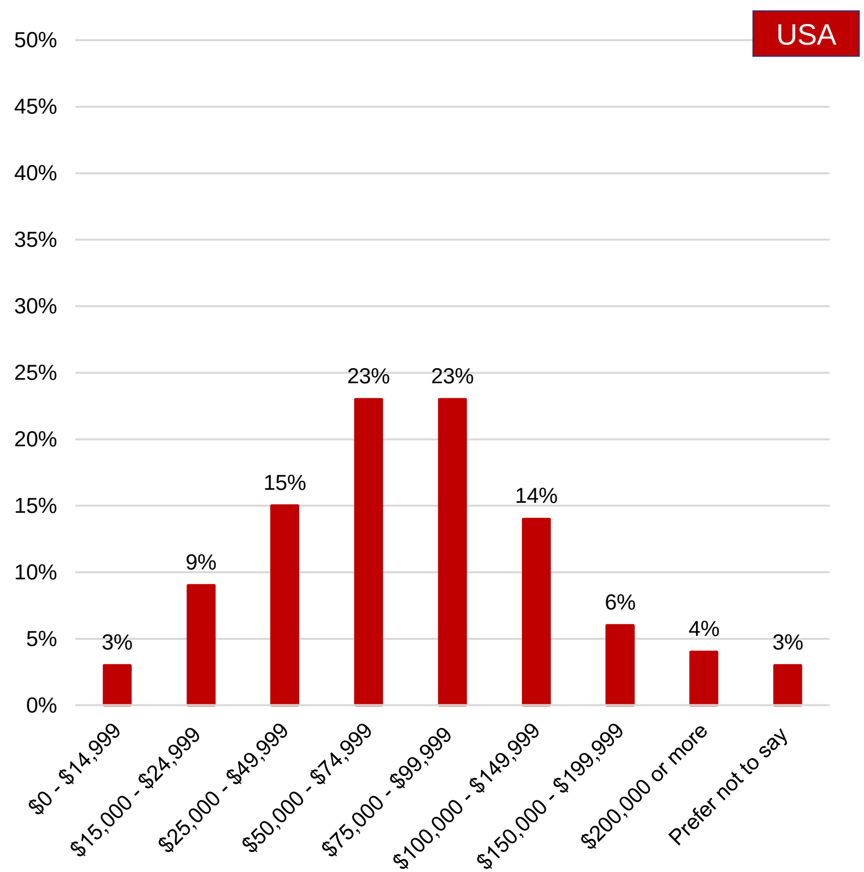
Consumers' pre-COVID-19 incomes are nationally representative

Q: What is/was your current household annual income, before the COVID-19 crisis (before tax)?

More than half of UK consumers earn less than £35,000 annually



Almost half of USA consumers earn more than $49,999 annually

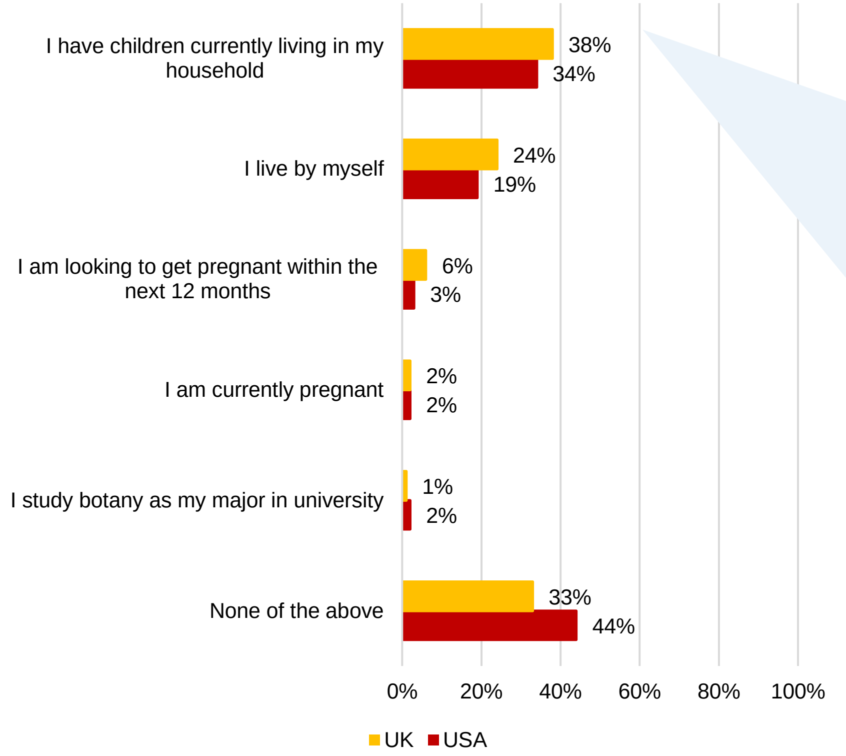


%s in this report are out of the total sample.

Over half of consumers do not have children in their household

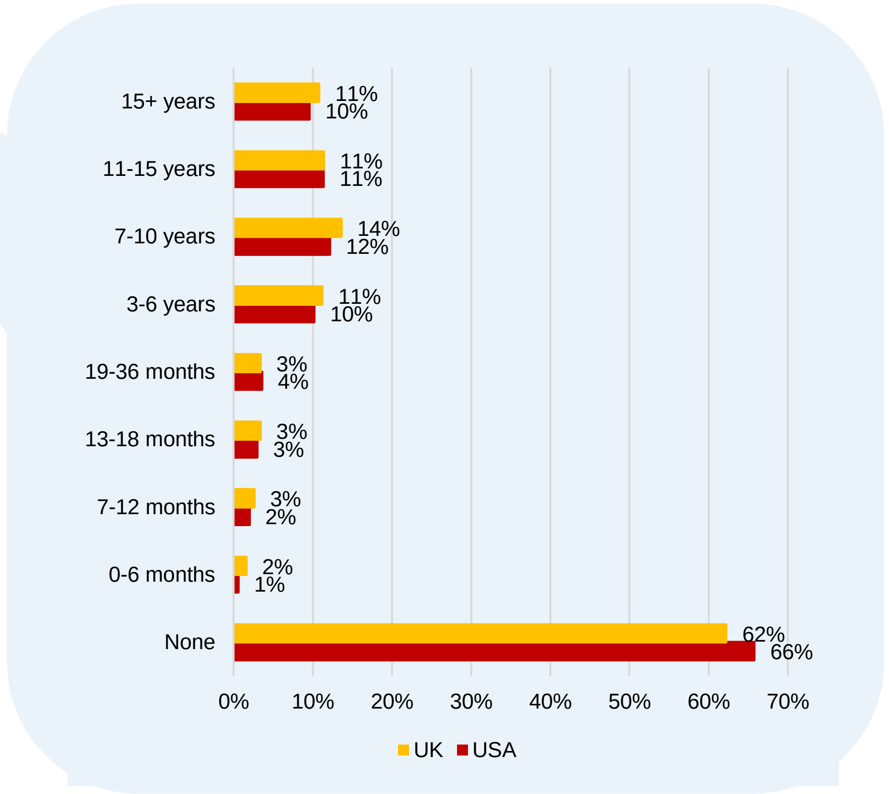
Fewer than 50% of consumers have children living in their household

Q: Which of the following statement(s) applies to you? Please select all that apply.



Of those who have children in their household, majority are aged 3+ years

Q: Do children in each of the following age groups live in your household? Please select all that apply.



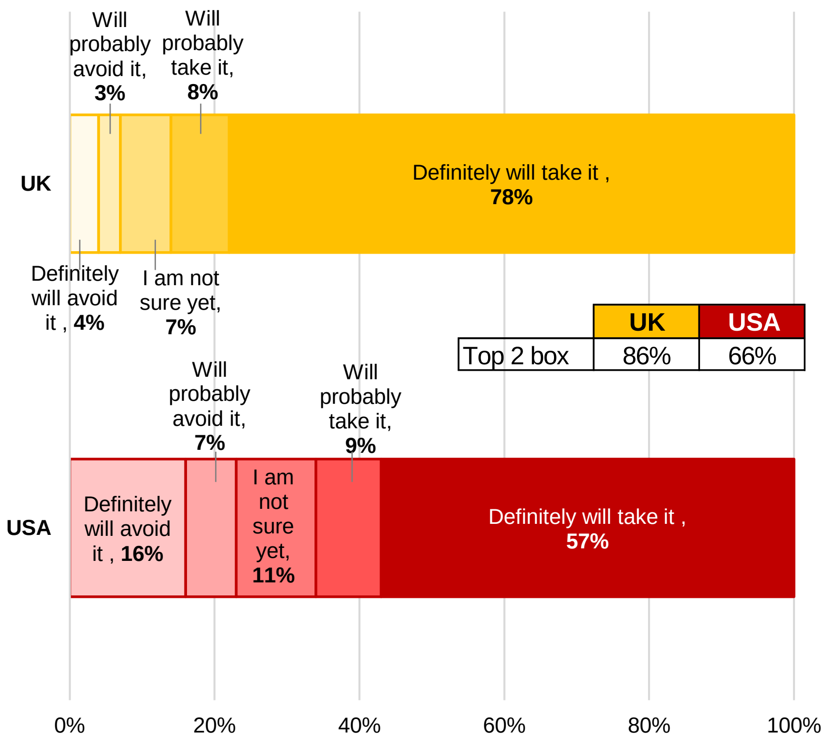
%s in this report are out of the total sample.

COVID-19 Vaccine Topic

Most consumers are willing to take COVID-19 vaccine; UK are more receptive than US

Majority of consumers would take COVID-19 vaccine; higher acceptance in UK

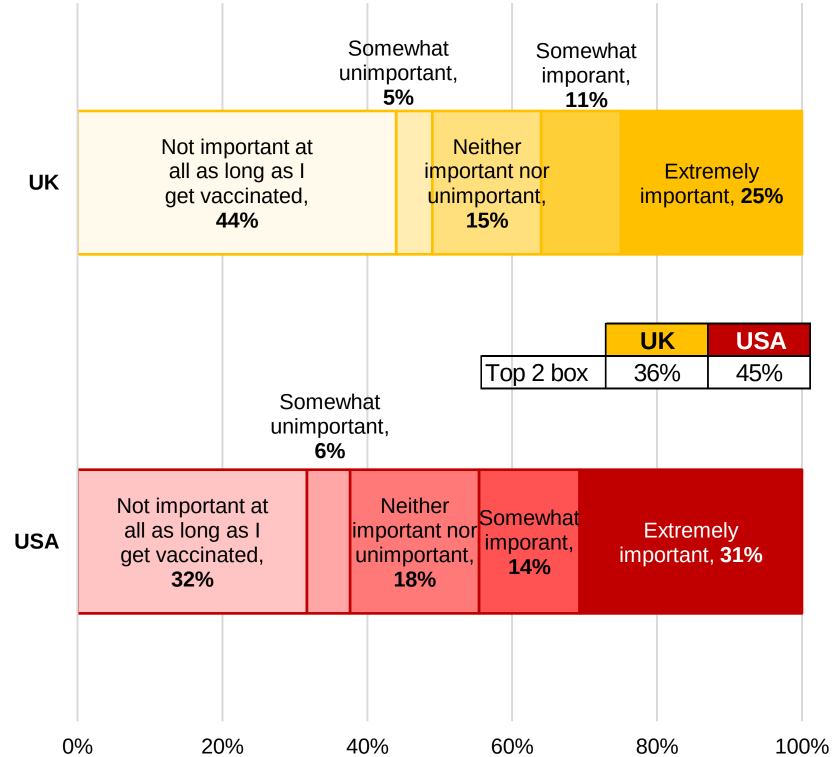
Q: How willing are you to receive the COVID-19 vaccine when it becomes available to you?



	UK	USA
Top 2 box	86%	66%

USA consumers are more adamant about getting vaccine at a major medical centre vs UK

Q: How important is it to you that you get vaccinated at a major medical centre (e.g. hospital) versus a community medical centre (e.g. neighbourhood clinic)?



	UK	USA
Top 2 box	36%	45%

%s in this report are out of the total sample.

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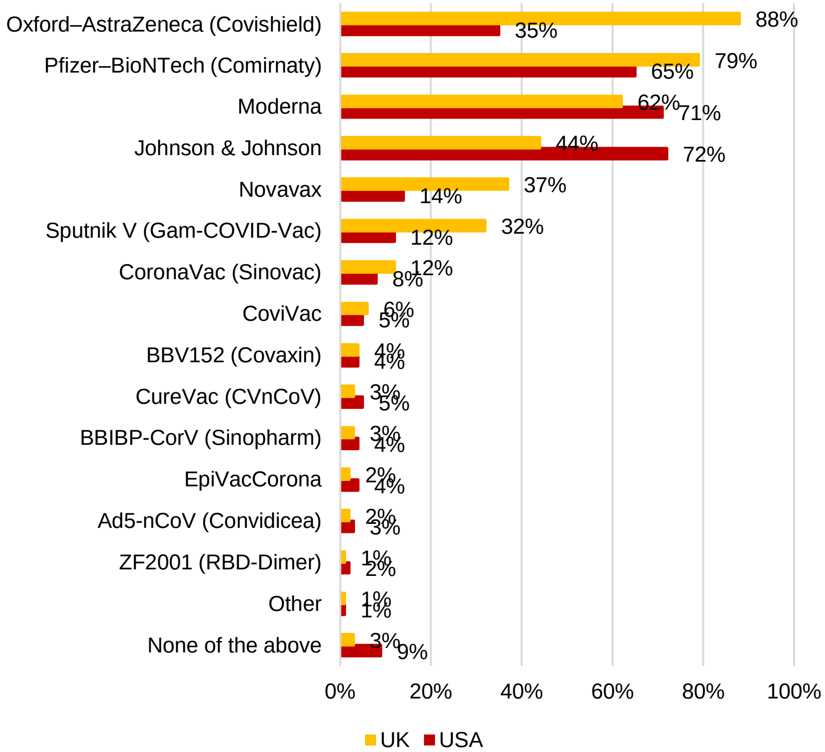
Choice of vaccine linked to brand awareness; UK & US hold different preferences

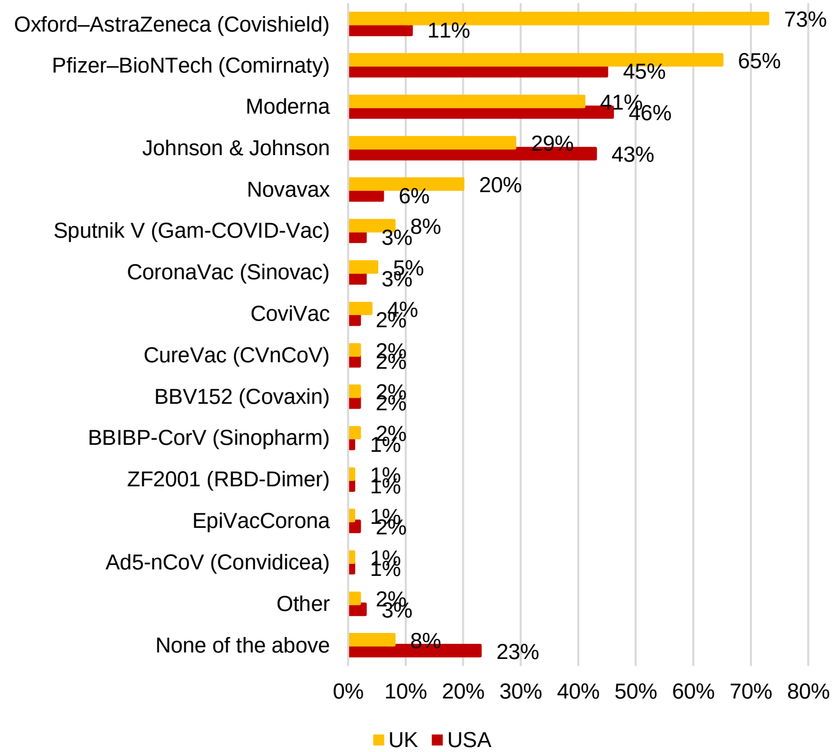
UK are most aware of Oxford and Pfizer; Moderna and Johnson & Johnson in the USA

Q: Which of the following vaccines have you heard of?



Preferred choice of vaccines differs in the UK and the USA

Q: Which of the following vaccines would you be willing to take if / when they become available to you?



%s in this report are out of the total sample.

COVID-19 Vaccine attributes used in the UK and USA conjoint study were based on those in China study by Leng *et al.*

Which of the following COVID-19 vaccines would you choose, if any?

	Vaccine A	Vaccine B	Vaccine C
Vaccine effectiveness	Protects **60%** of vaccine recipients	Protects **40%** of vaccine recipients	Protects **40%** of vaccine recipients
Risk of side effects	**1 out of 100,000** risk of experiencing severe side effects	**50 out of 100,000** risk of experiencing severe side effects	**1 out of 100,000** risk of experiencing severe side effects
Number of doses	**One** dose to achieve immunity	**One** dose to achieve immunity	**Two or more** doses to achieve immunity
Duration of vaccine protection	Vaccine provides **six months** of protection against COVID-19	Vaccine provides **more than two years** of protection against COVID-19	Vaccine provides **one year** of protection against COVID-19
Acquaintances vaccinated *(The percentage of your family, friends, and acquaintances who are already vaccinated with this vaccine)*	**30%** of your family, friends, and acquaintances are already vaccinated with this vaccine	**90%** of your family, friends, and acquaintances are already vaccinated with this vaccine	**60%** of your family, friends, and acquaintances are already vaccinated with this vaccine
Cost	This vaccine is **free**	This vaccine is **free**	You must **pay** for this vaccine yourself
	CHOOSE	CHOOSE	CHOOSE

NONE OF THE ABOVE

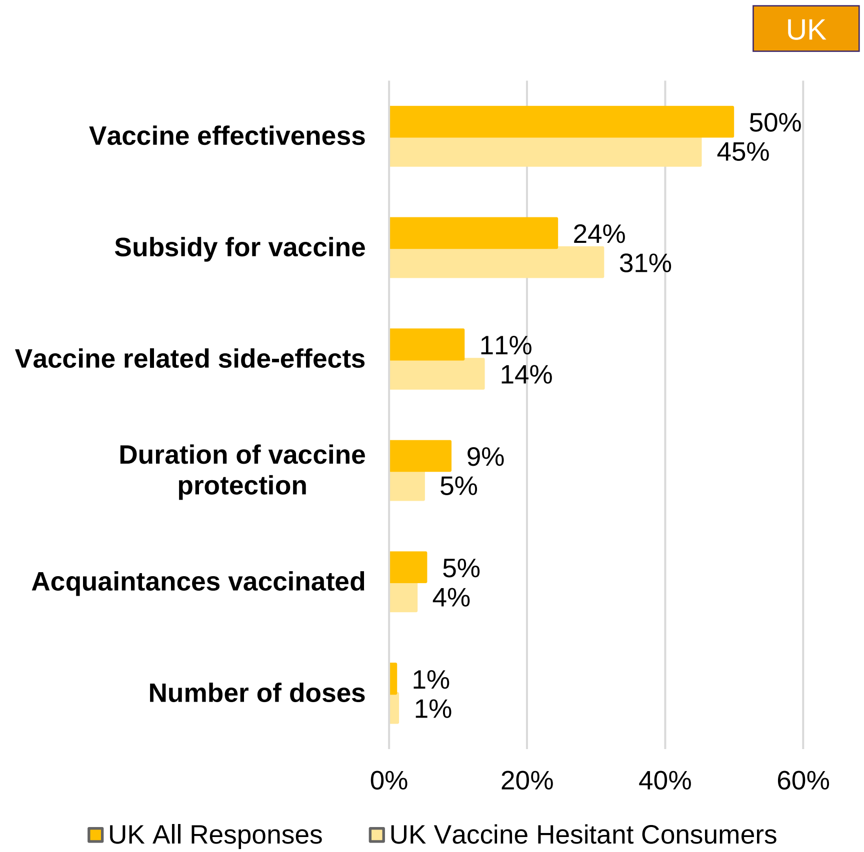
Screenshot of Conjoint.ly choice tasks for the study

conjoint.ly		Leng et al. (2020, p. 248)[1]	
Attributes	**Levels**	**Attributes**	**Levels**
Vaccine effectiveness	40%	**Vaccine effectiveness**	40%
	60%		60%
	85%		85%
Vaccine related side-effects	50/100,000	**Vaccine related side-effects**	50/100,000
	10/100,000		10/100,000
	1/100,000		1/100,000
Subsidy for vaccine	Subsidised	**Access to vaccine**	Free and voluntary
	Unsubsidised		Free and compulsory
			Chargeable and voluntary
Number of doses	One dose	**Number of doses**	One dose
	≥2 doses		≥2 doses
		Vaccination sites	First level
			Second level
			Third level
Duration of vaccine protection	Six months	**Duration of vaccine protection**	Six months
	One year		One year
	More than two years		More than two years
Acquaintances vaccinated	30%	**Acquaintances vaccinated**	30%
	60%		60%
	90%		90%

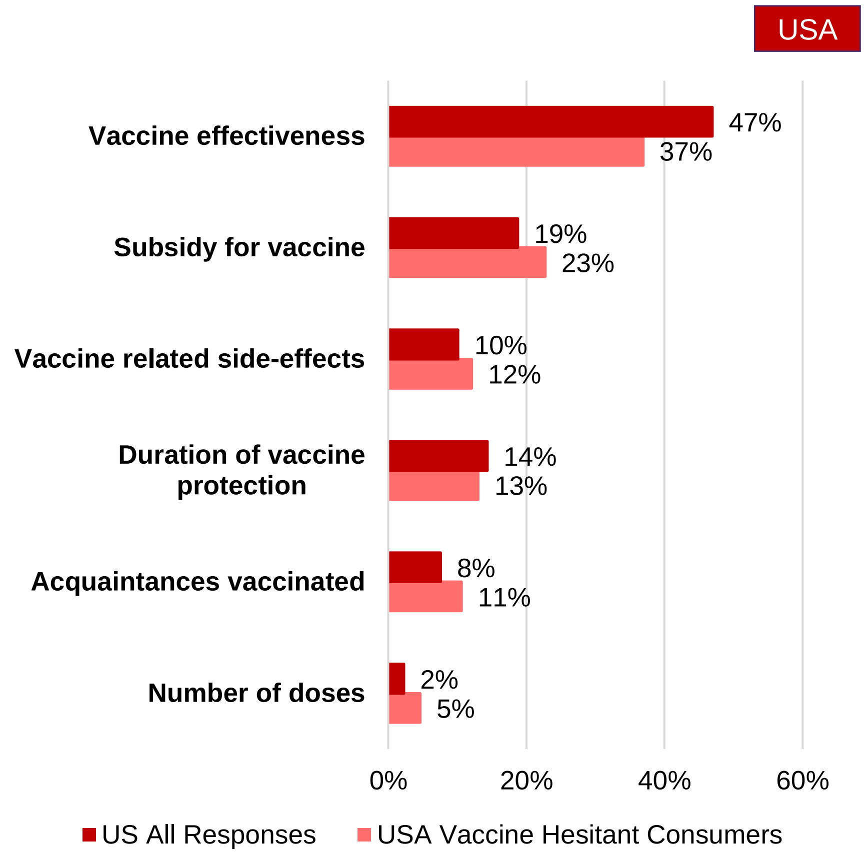
(1) Leng, A., Maitland, E., Nicholas, S., Liu, R., Wang, J. and Wang, S., 2020. Individual Preferences for COVID-19 Vaccination in China. *SSRN Electronic Journal*, [online] Vaccine 39(2), pp.247-254. Available at: <https://bit.ly/3v4K2aO>.

When choosing between vaccines, people in general care most about vaccine effectiveness; the vaccine-hesitant will be more swayed by subsidy

In the UK, vaccine-hesitant people care more about access to vaccine and side effects



In the USA, vaccine-hesitant people also care more about their acquaintances receiving the same vaccine



More information on how to read importance scores. "Vaccine Hesitant Consumers" are consumers who responded "I'm not sure yet", "Will probably avoid it", or "Definitely will avoid it" on their willingness to receive the vaccine.

When choosing whether to vaccinate, hesitant people in USA are less responsive to improvements in characteristics of vaccine

UK hesitant consumers are especially interested in vaccine effectiveness and subsidisation

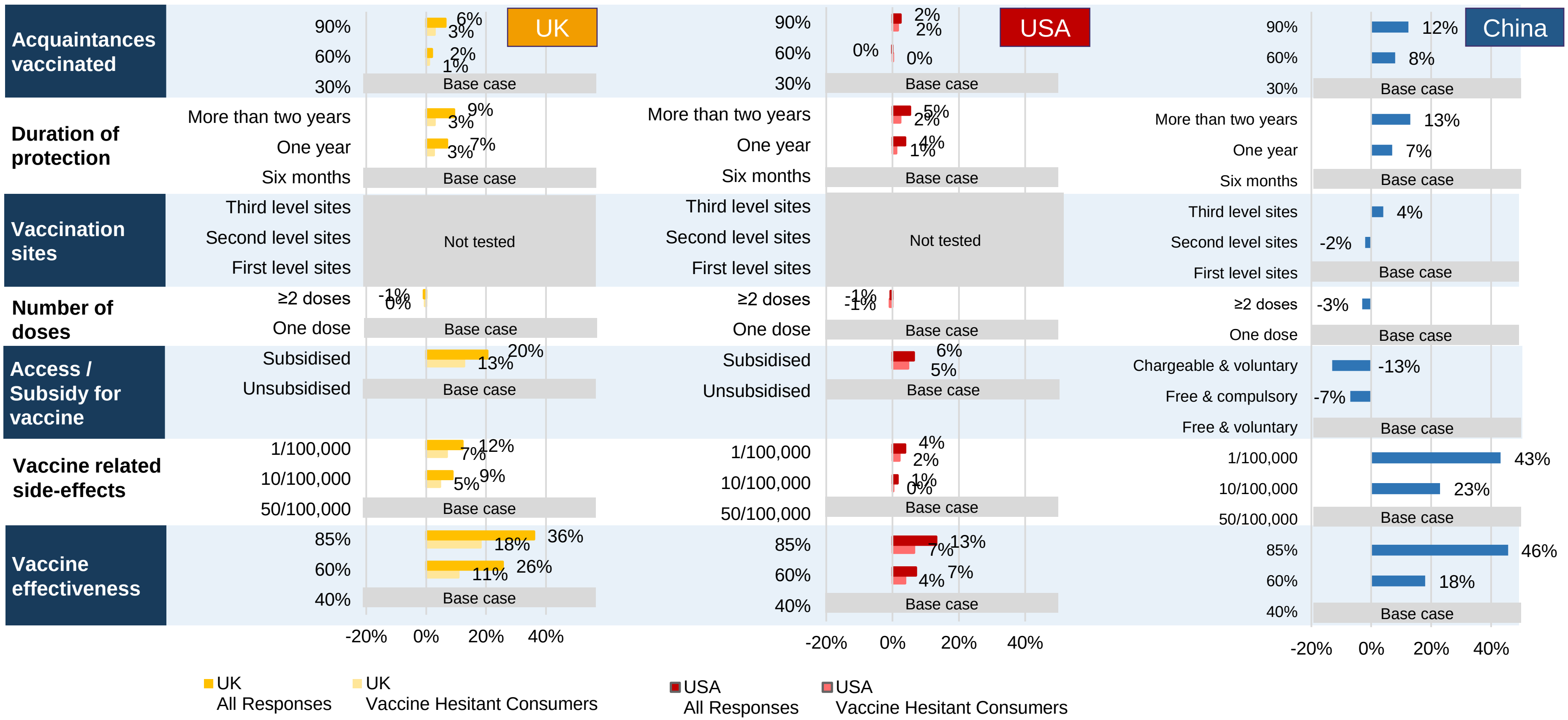
Approximate % change in probability of take-up

USA hesitant consumers are less responsive to receiving vaccine regardless of other attributes

Approximate % change in probability of take-up

Unlike in China[(1)] , vaccine hesitant consumers in the UK & US are more likely to receive a subsidised vaccine

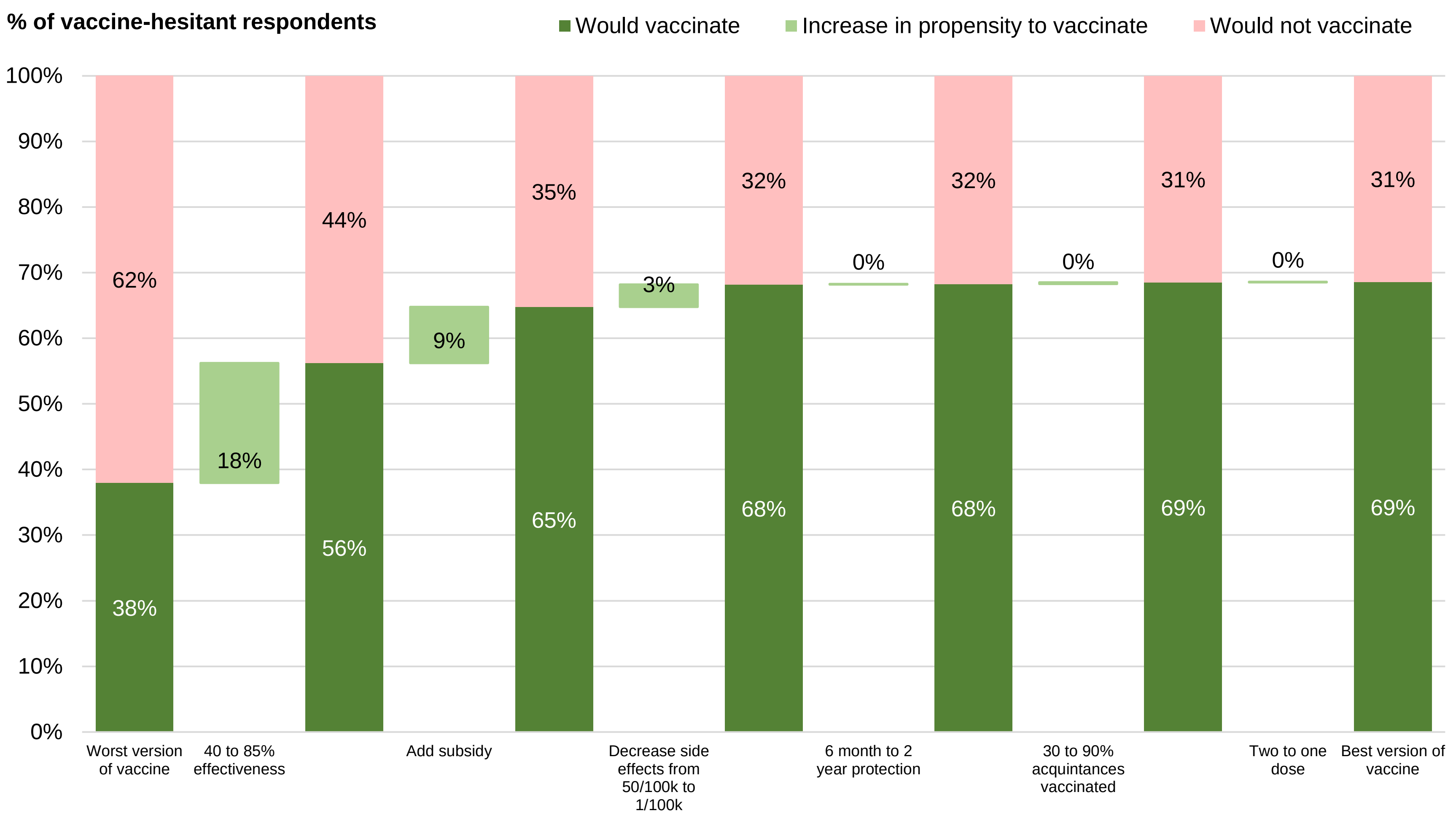
Calculated % change in probability of take-up



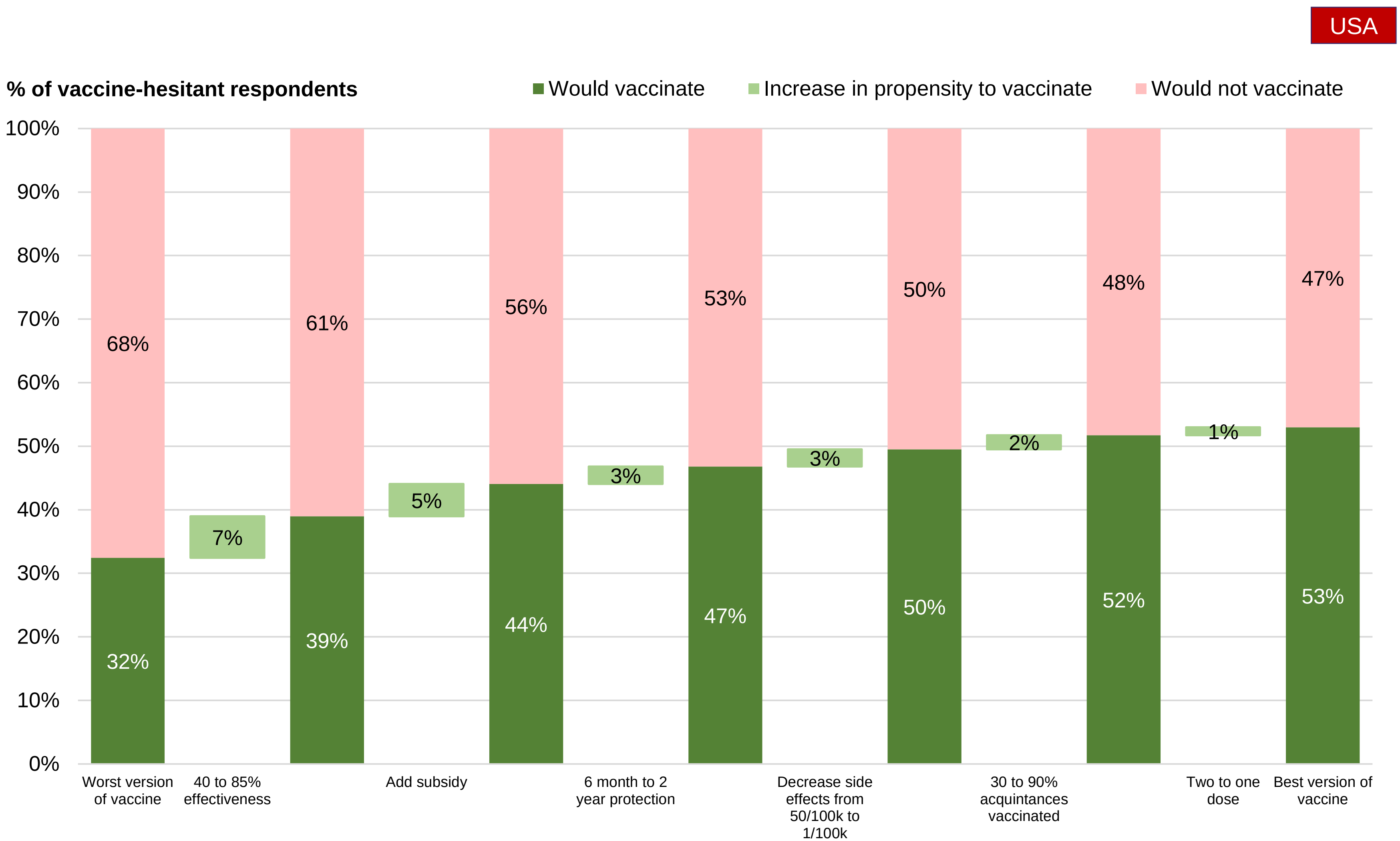
[(1)] China results are based on Figure 2 extracted from 'Individual preferences for COVID-19 vaccination in China' (Leng et al. 2020, p. 252).

When deciding whether to vaccinate, hesitant people in UK are most effectively convinced by **vaccine effectiveness**, **subsidy**, and **lower risks of side effects**

UK



When deciding whether to vaccinate, hesitant people in USA are most effectively convinced by **vaccine effectiveness** and **subsidy**



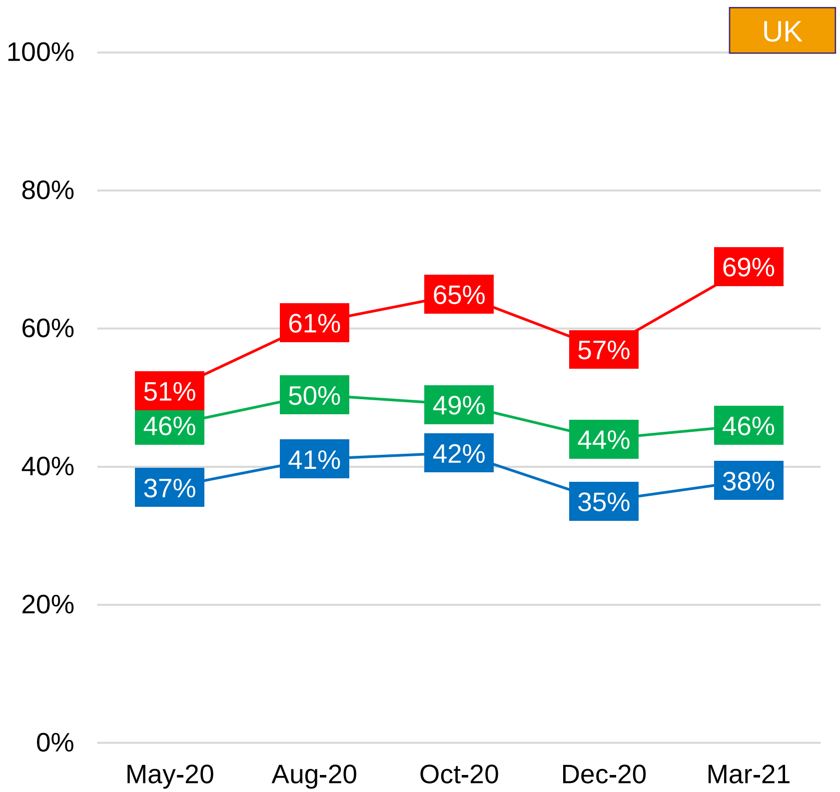
Consumption trends

UK consumers increased online clothes shopping; USA consumers ordering more groceries and food online

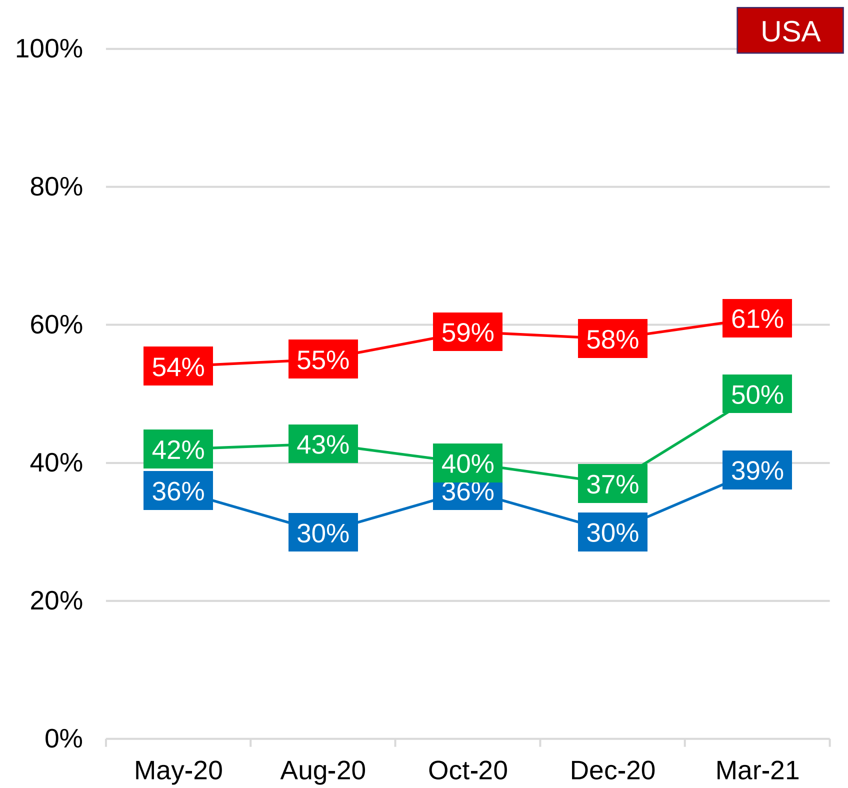
Q: If you shop online, which of the below do you shop for?

Trending data

UK consumers are online clothes shopping more



USA are spending more on groceries and food delivery



Groceries | Food delivery | Clothes

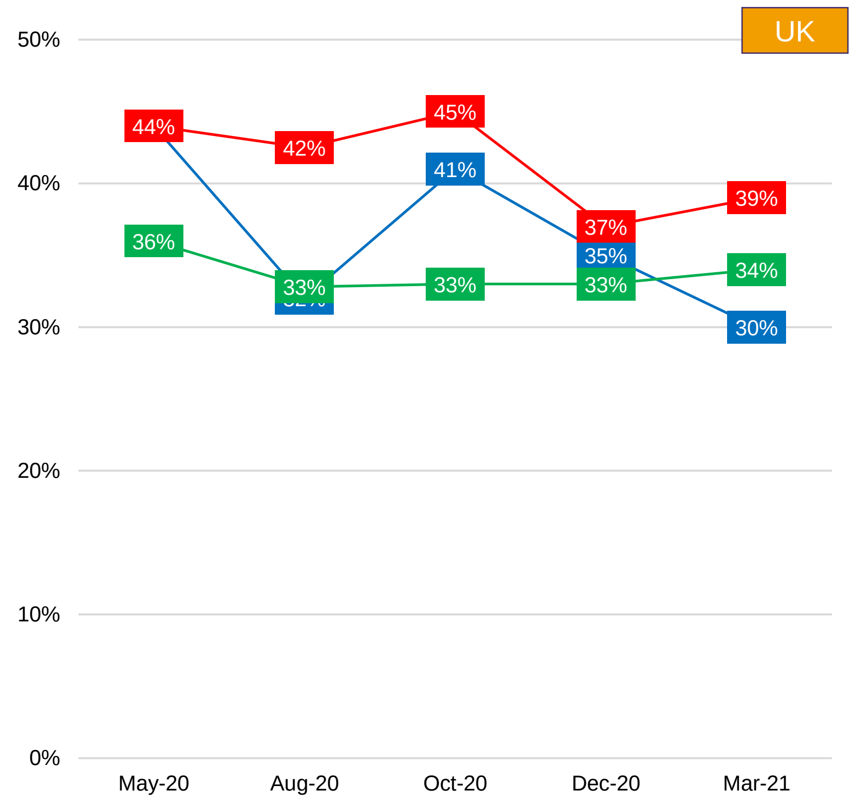
Margin of error: 3 p.p. %s in this report are out of the total sample.

UK consumers are less worried but more frustrated and anxious vs Dec 2020; USA have more positive outlook

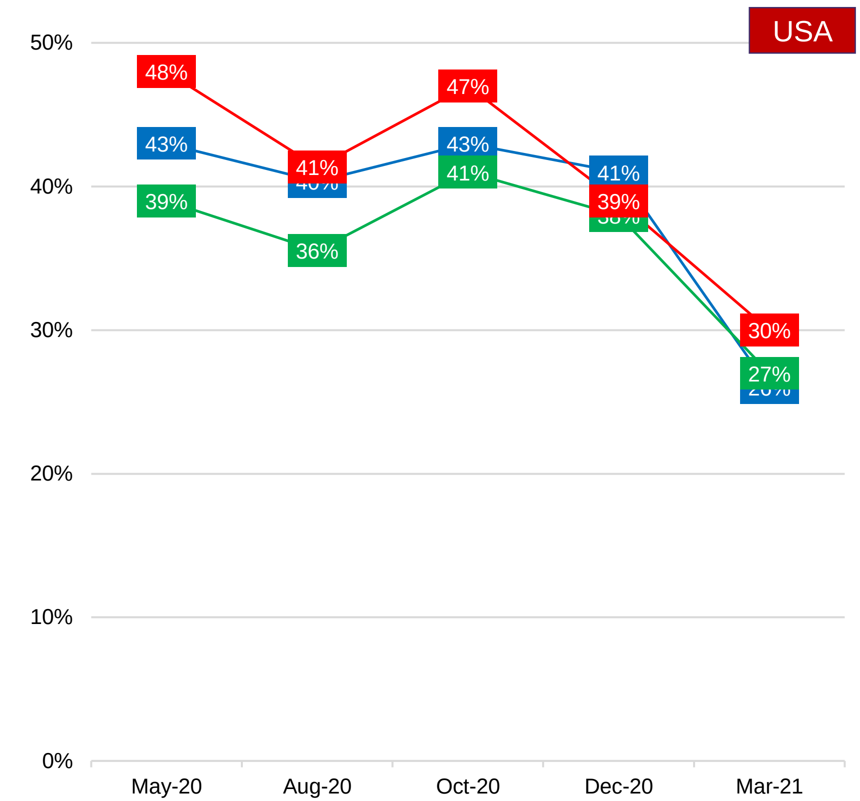
Q: Which of the below is most appropriate in describing how you are feeling in the recent 2 weeks?

Trending data

UK consumers who feel worried continue to decline



USA consumers are feeling less anxious and frustrated than the months before



Frustrated | Worried | Anxious

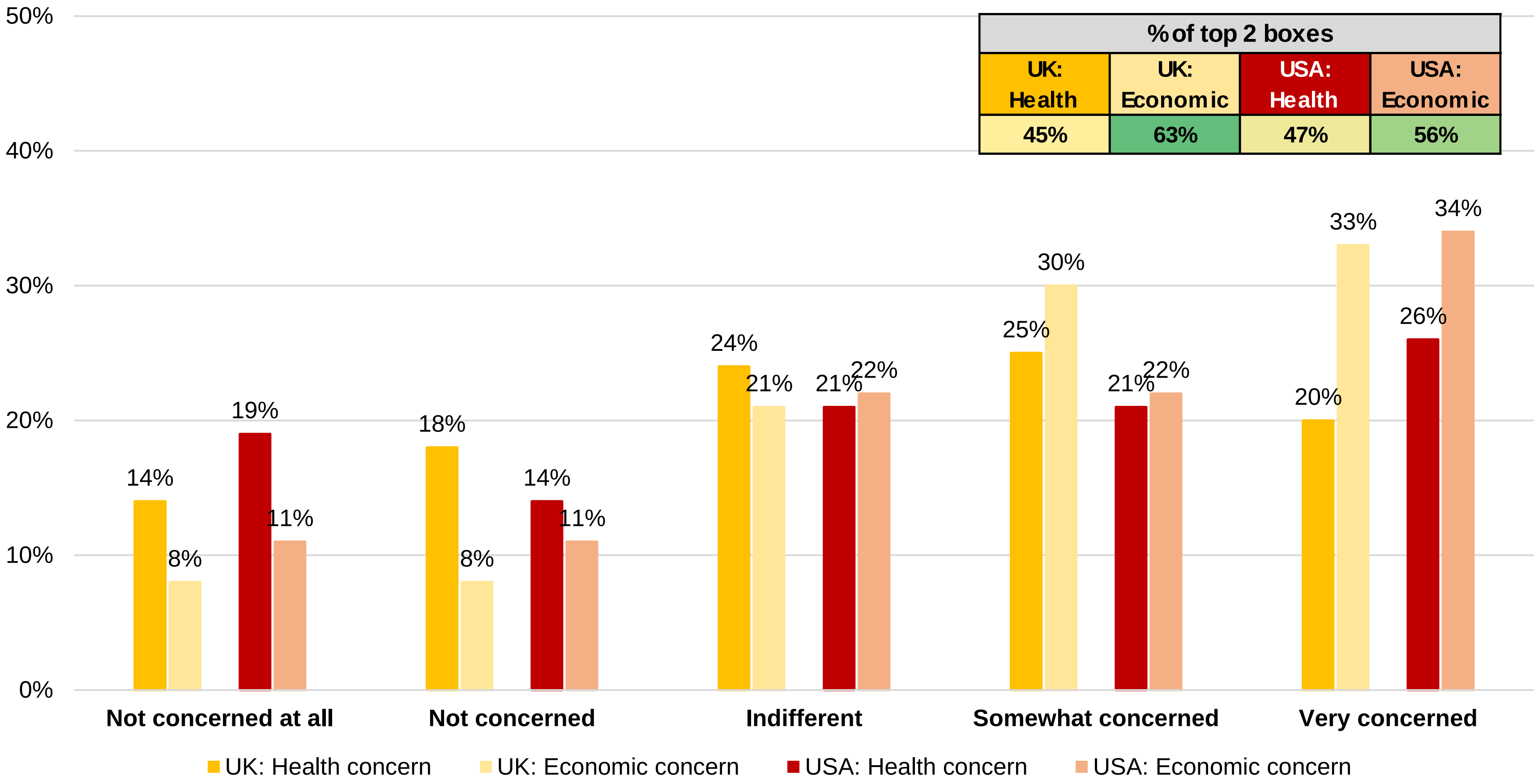
Margin of error: 3 p.p. %s in this report are out of the total sample.

Consumers are more concerned about the economic impact of COVID-19 than its health impact

Q: On a scale of 1 to 5, how concerned are you…

- *Health: that you or anyone in your household may contract the COVID-19 virus?*
- *Economy: about the economic implications (loss of jobs, income, etc.) due the COVID-19 crisis?*

% of top 2 boxes			
UK: Health	UK: Economic	USA: Health	USA: Economic
45%	63%	47%	56%

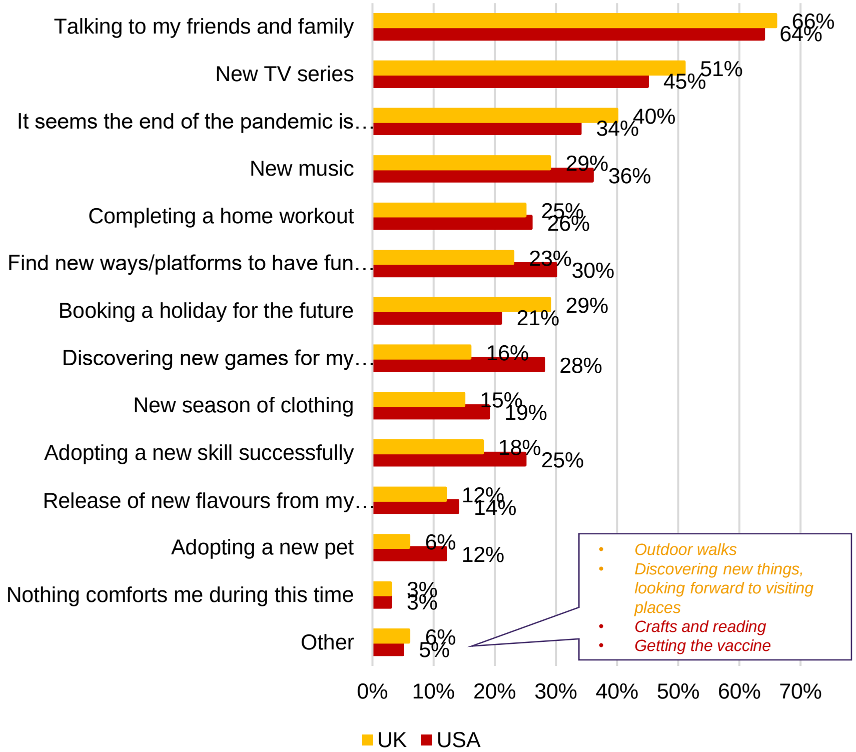


%s in this report are out of the total sample.

Consumers take comfort in talking to friends and family; most excited about hanging out post COVID-19

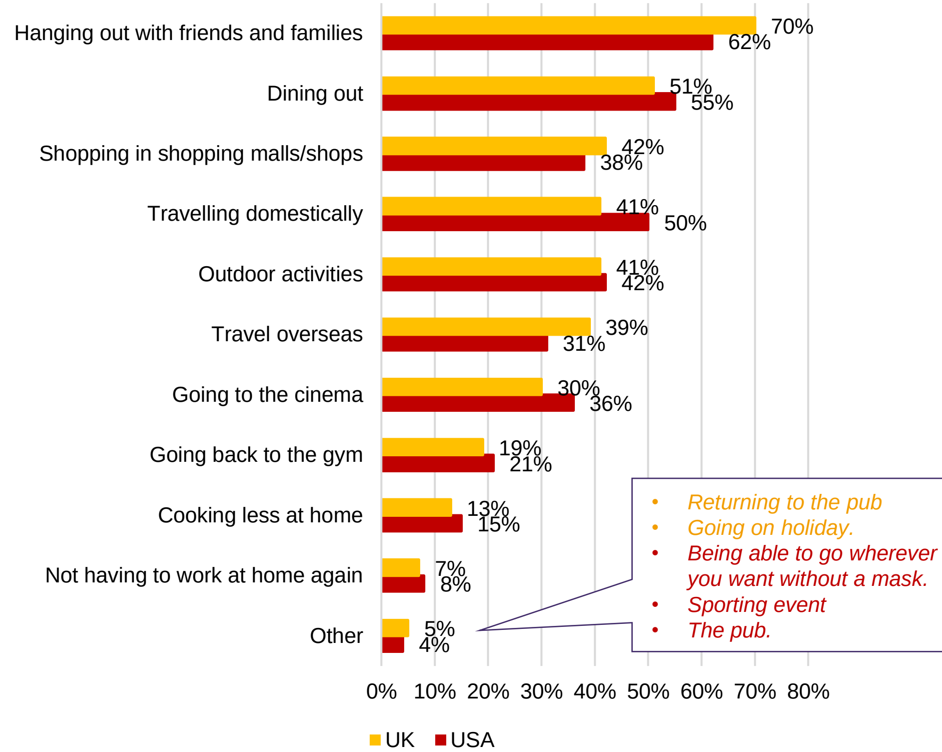
Talking with friends and family, and watching new TV series keeps consumers comfortable

Q: During this difficult time, what brings you comfort?



Consumers look forward to hanging out with friends and family and dining out after COVID-19

Q: Which of the below are you most excited about, post COVID-19? Please select all that apply.



%s in this report are out of the total sample. Respondents' answers have been edited for grammatical correctness.

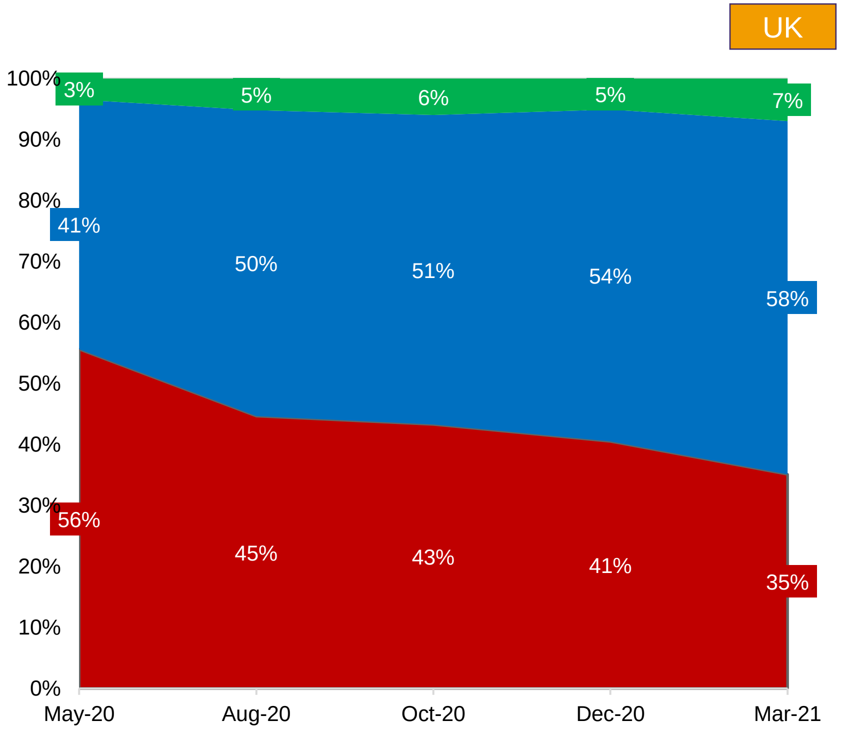
Consumers are expecting fewer changes to their income

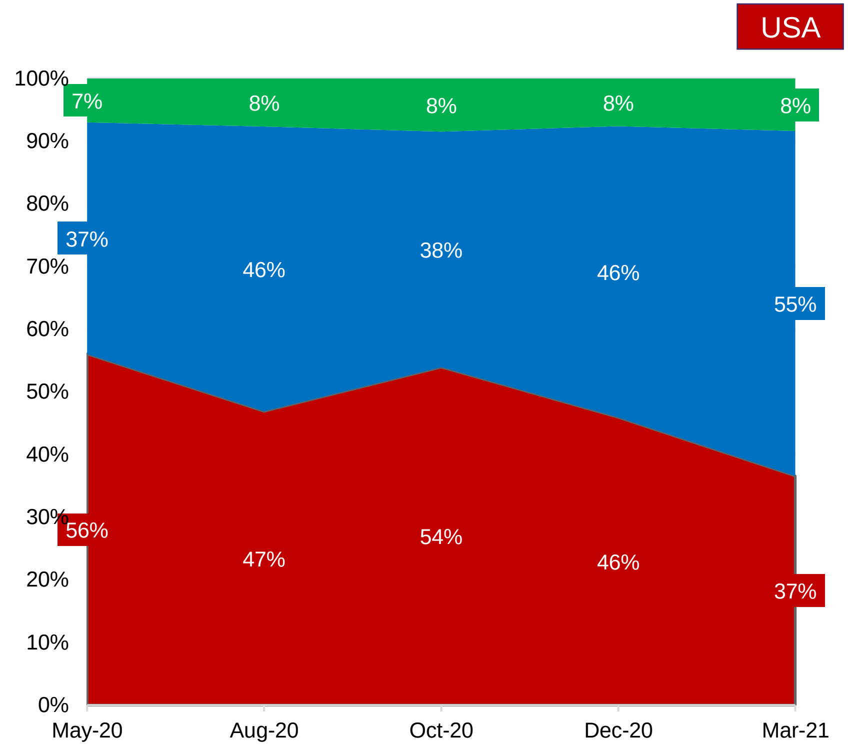
Trending data

Steady decline in UK consumers expecting changes to income

Over half of USA consumers are now expecting no change in income

Q: Would you expect any change to your current household income in the near future, due to the COVID-19 crisis (including other sources of income, e.g. government support packages, investment portfolio, etc.)? If so, by how much?





Expecting ▲ to income | Expect no change | Expecting ▼ to income

Margin of error: 10 p.p. for expecting decrease, 4 p.p. for expecting no change and 1 p.p. for expecting increase

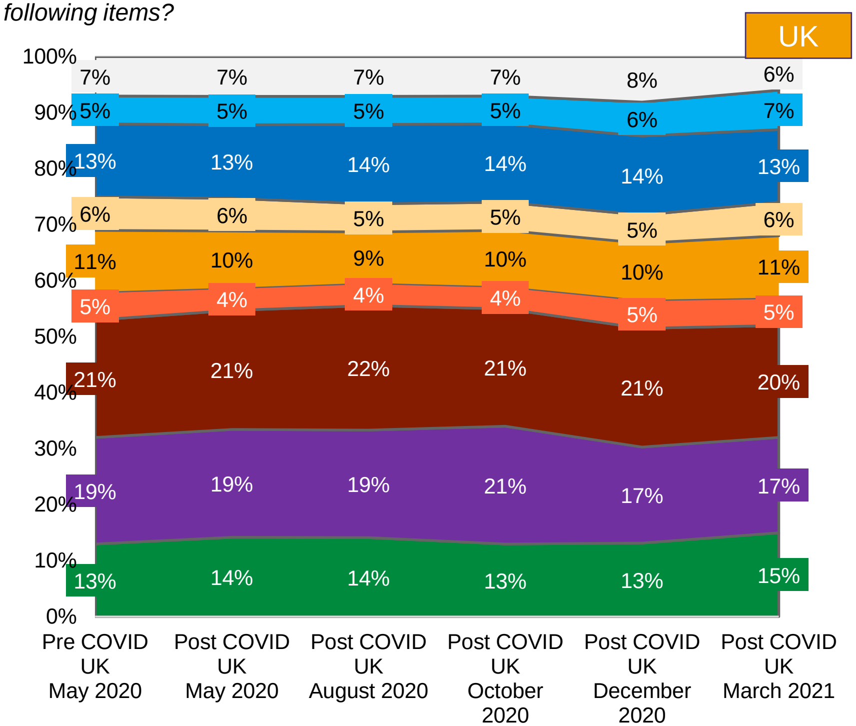
Both UK and USA consumers are expecting to spend more on savings and investments

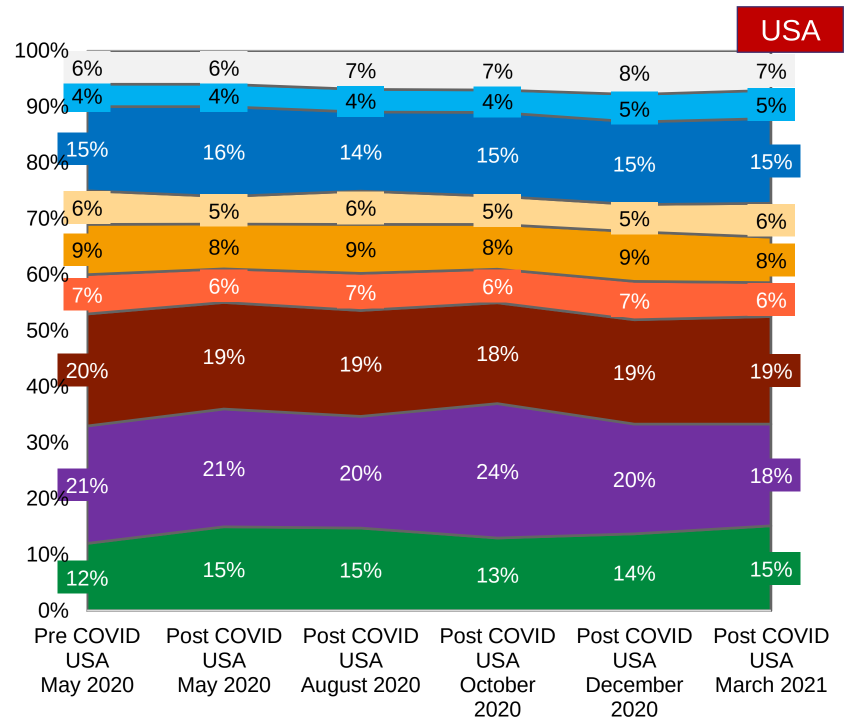
Trending data

UK consumers expect to spend less on groceries and transportation and more on savings and investments

USA consumers are expecting to spend less on rent and more on savings and investments

Q-before: How have you allocated your income (in %) to each of the following items, prior to the COVID-19 crisis?
Q-after: Thinking about the near future, considering any expected changes in your income, how would you allocate your expected future income (in %) to each of the following items?





Savings/ investments	**Rent**	**Groceries**	**Eating out**	**Shopping**
Entertainment	Transportation and bills	Travel	Other items	

Margin of error: 1 p.p. %'s in this report are out of the total sample.