COVID-19

US Vaccine Sentiment Snapshot #4: Three Paths to 70%

May 20, 2021
Since January, BCG has been surveying Americans to understand levels of COVID-19 vaccine hesitancy and to explore the factors preventing or discouraging individuals who are currently eligible and want to get vaccinated from receiving their inoculation. From April 20 to April 25, BCG conducted a fourth US COVID-19 Vaccine Sentiment Survey to understand how perceptions and hesitancy have evolved over the past few months. Our findings suggest—encouragingly—that despite some entrenched hesitancy, there is a path not only to reach 70% of US adults but also potentially to reach 70% of the broader population, by focusing on the vaccine hesitant and teenage populations.

Please follow BCG’s COVID-19 US Vaccine Sentiment Series on BCG.com.
VACCINATE THE EAGER TO ACHIEVE 70% ADULT UPTAKE

In early May, as the number of US adults with at least one COVID-19 vaccine dose approached 150 million, President Biden added another seemingly audacious goal: to vaccinate 70% of US adults by July 4. If we include in our calculations all Americans ages 16 and older who have been eligible for vaccines since April 19, we estimate that the US can achieve the president’s goal by vaccinating everyone who is currently scheduled and eager to get vaccinated. (See Exhibit 1.)

Nevertheless, hesitancy remains largely unchanged across the US adult population, with some significant variations by age group, household income, gender, race, and ethnicity. (See Exhibits 2 and 3.)
If a vaccine against COVID-19 were available to you today at no cost, how likely would you be to get it?

Exhibit 1 | To Meet the July 4 Immunization Target of 70%, the US Must Vaccinate All Eager Adults


Note: Cumulative vaccinated population data is from the CDC vaccine tracker. The number of scheduled appointments in January was calculated as the total number of vaccines scheduled three weeks ahead of the date of the survey; the number of scheduled appointments in March was calculated from respondents who reported having a currently scheduled appointment. Hesitancy is attributed to respondents who answered “Maybe,” “Somewhat unlikely,” or “Highly unlikely” to a question asking whether they would make an appointment for a COVID-19 vaccine today if it were available. The size of the US population in each hesitancy segment was derived from the percentage of respondents. Because of rounding, the percentages in the bar charts do not add up to 100%.

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If a vaccine against COVID-19 were available to you today at no cost, how likely would you be to get it?

- **Definitely**: 51%
- **Likely**: 11%
- **Maybe**: 8%
- **Unlikely**: 8%
- **Definitely not**: 13%

To vaccinate 70% of US adults by July 4, the country must vaccinate everyone who is eager...

...but to achieve 70% protection overall, it must continue to drive demand.

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To vaccinate 70% of US adults by July 4, the country must vaccinate everyone who is eager...

- **Total US population**: 328 million
- **16 years old or older**: 265 million
  - **Definitely**: 51%
  - **Likely**: 11%
  - **Maybe**: 8%
  - **Unlikely**: 8%
  - **Definitely not**: 13%
- **12 to 15 years old**: 17 million
- **Less than 12 years old**: 46 million

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Note: Cumulative vaccinated population data is from the CDC vaccine tracker. The number of scheduled appointments in January was calculated as the total number of vaccines scheduled three weeks ahead of the date of the survey; the number of scheduled appointments in March was calculated from respondents who reported having a currently scheduled appointment. Hesitancy is attributed to respondents who answered “Maybe,” “Somewhat unlikely,” or “Highly unlikely” to a question asking whether they would make an appointment for a COVID-19 vaccine today if it were available. The size of the US population in each hesitancy segment was derived from the percentage of respondents. Because of rounding, the percentages in the bar charts do not add up to 100%.
Exhibit 2 | Hesitancy in the US Is Highest Among Lower-Income Adults

If a vaccine against COVID-19 were available to you today at no cost, how likely would you be to get it?

Vaccination rates and hesitancy remain highest among adults under 35

Lower-income adults are consistently more hesitant about the vaccine

Source: BCG National Vaccine Sentiment Survey, March 16–21, 2021 (n = 1,794), and April 20–25, 2021 (n = 1,945).
Note: Because of rounding, some of the percentages in the bar charts do not add up to 100%.
Exhibit 3 | Among Black Respondents, Approximately One in Four Express Strong Hesitancy About Getting the Vaccine

If a vaccine against COVID-19 were available to you today at no cost, how likely would you be to get it?

\[
\begin{array}{cccccc}
\text{Definitely} & \text{Likely} & \text{Maybe} & \text{Unlikely} & \text{Definitely not} \\
\text{Vaccinated or scheduled} & \text{Definitely} & \text{Likely} & \text{Maybe} & \text{Unlikely} & \text{Definitely not}
\end{array}
\]

Source: BCG National Vaccine Sentiment Survey, March 16–21, 2021 (n = 1,794), and April 20–25, 2021 (n = 1,945).

Note: Because of rounding, some of the percentages in the bar charts do not add up to 100%.
ACCESS CONTINUES TO BE A HURDLE FOR MANY AMERICANS

Using a set of questions similar to those we posed in our previous Vaccine Sentiment Snapshot, we asked respondents about the vaccination process from end to end, starting with wanting to get the vaccine and ending with finding and successfully scheduling a workable appointment. Survey participants indicated that eligibility and availability issues have decreased since February, but that availability and urgency hurdles remain. (See Exhibit 4.) The White House’s most recent vaccination plan builds on many techniques that states across the country have used successfully: funding community groups to perform door-to-door outreach, accommodating walk-in appointments, and offering SMS tools to help people find their nearest vaccination center.
Exhibit 4 | Hesitancy and Accessibility Remain Key Barriers to Vaccination

Percentage of the total from the previous step in the funnel:
- 100% Are eligible but not yet vaccinated
- 50% Want the vaccine
- 65% Know they are eligible
- 60% Tried to make an appointment
- 70% Found appointments
- 0% Made an appointment

Percentage of those stalled from the previous step in the funnel:
- 50% Of those who are eligible and not vaccinated are hesitant to get the vaccine
- 35% Of those who want the vaccine do not know they are eligible
- 40% Of those who know they are eligible haven’t tried to make an appointment
- 30% Of those who’ve tried to register haven’t been able to find an appointment
- 65% …Couldn’t find an appointment time at an accessible location
- 35% …Couldn’t complete registration due to registration process issues

Source: BCG National Vaccine Sentiment Survey, April 20–25, 2021 (n = 1,945).
Note: “Hesitant” applies to respondents who described themselves as “unlikely” to get the vaccine or as “definitely not” planning to get it.
VACCINATE THE HESITANT TO PROTECT OUR COMMUNITIES

Although it may be possible to vaccinate 70% of US adults by making appointments more accessible to the remaining population of eager potential recipients, exceeding this goal would entail changing the hearts and minds of some members of the “resilient red”—the 20% or so of US adults who are still strongly hesitant. This percentage has changed little since January.

Persuading members of this group to get vaccinated will require applying localized solutions that address a three-part demand generation framework. (See Exhibit 5.)
<table>
<thead>
<tr>
<th>LEVER</th>
<th>EDUCATE</th>
<th>FACILITATE</th>
<th>INCENTIVIZE</th>
</tr>
</thead>
<tbody>
<tr>
<td>SUBLAYER</td>
<td>Overcome hesitancy by tackling misinformation about vaccines</td>
<td>Improve access to and logistical support for getting vaccinated</td>
<td>Drive uptake among indifferent or hesitant residents by increasing the upside of vaccination</td>
</tr>
</tbody>
</table>
| • Centralized marketing  
• Grassroots campaigns | • Location and timing  
• Registration  
• Vaccination site services | • Perks  
• Policy | • Perks  
• Policy |
| Public awareness campaigns, community events, door-to-door outreach, etc. | Increased allocation of doses to local pharmacies, expansion to primary care physicians, mobile vaccination sites, simplified registration, etc. | Cash incentives offered by employers, vaccine passports, incentive payments to physicians who administer vaccines |
In accordance with this framework, states and local governments should pursue actions directed toward three key objectives:

- **Educate individuals to combat vaccine hesitancy.** The key here is to enlist the support of messengers who are most trusted by members of strongly hesitant populations. (See Exhibit 6.) Thematically, medical professionals and friends/family fall into that category, so local health officials should partner with primary care providers, hospitals, and other medical institutions to help promote the message that everyone should get vaccinated.

- **Facilitate easier access to vaccines.** People tend to approach some locations more often than others in trying to register for a vaccine. (See Exhibit 7.) Nearly a third of Americans have attempted to get vaccinated through their local physician’s office or their local pharmacy. As operations at mass vaccination sites wind down in response to a gradual slowdown in demand, it will be critical to reduce barriers to immunization by shifting messaging and doses to places where people expect to get vaccinated.

- **Incentivize individuals by creating additional benefits to getting vaccinated.** Although local employers and officials continue to wait for FDA guidance on vaccine mandates, many national organizations are pushing for the government to introduce incentives. West Virginia has started offering savings bonds to younger individuals who get vaccinated; other states, such as New Jersey, are partnering with local breweries to provide free beer for people who get their vaccine. Most recently, Ohio announced a state lottery that will award five $1 million prizes over the next five weeks; the lottery is open to any adult Ohio resident who has received at least one dose of a COVID-19 vaccine. For their part, the National Basketball Association, the National Football League, Major League Baseball, and other national sports leagues are offering access to better seats, discounts on swag, and lotteries for vaccinated fans.
While winning over members of the highly hesitant group will continue to be a challenge, the imperative to protect our communities and neighbors remains a strong motivation for attempting to sway them. Luckily, another tranche of individuals will soon become eligible for the vaccine.
Exhibit 6 | Hesitant People Are Most Likely to Trust Information from Personal Networks or Health Professionals

How reliable are the following people/groups when it comes to sharing information about the COVID-19 pandemic? (%)

<table>
<thead>
<tr>
<th>People/Groups</th>
<th>Very reliable</th>
<th>Mostly reliable</th>
<th>Unsure</th>
<th>Mostly unreliable</th>
<th>Very unreliable</th>
</tr>
</thead>
<tbody>
<tr>
<td>Your doctor/health care provider</td>
<td>13</td>
<td>30</td>
<td>36</td>
<td>8</td>
<td>14</td>
</tr>
<tr>
<td>Friends and family</td>
<td>13</td>
<td>26</td>
<td>38</td>
<td>10</td>
<td>12</td>
</tr>
<tr>
<td>Other health professionals (doctors, nurses, …)</td>
<td>8</td>
<td>23</td>
<td>41</td>
<td>9</td>
<td>18</td>
</tr>
<tr>
<td>Health care/scientific organizations (FDA, CDC, NIH, etc.)</td>
<td>8</td>
<td>18</td>
<td>38</td>
<td>10</td>
<td>25</td>
</tr>
<tr>
<td>Your local public health department</td>
<td>6</td>
<td>20</td>
<td>38</td>
<td>10</td>
<td>26</td>
</tr>
<tr>
<td>Your faith leader</td>
<td>8</td>
<td>15</td>
<td>47</td>
<td>8</td>
<td>22</td>
</tr>
<tr>
<td>Your state secretary or department of health</td>
<td>5</td>
<td>13</td>
<td>43</td>
<td>13</td>
<td>26</td>
</tr>
<tr>
<td>Dr. Fauci</td>
<td>6</td>
<td>10</td>
<td>40</td>
<td>9</td>
<td>35</td>
</tr>
</tbody>
</table>

Source: BCG National Vaccine Sentiment Survey, April 20–25, 2021 (n = 1,945).
Note: Because of rounding, some of the percentages in the bar charts do not add up to 100%.
Among Respondents Who Sought an Appointment, 36% Tried to Register at a Pharmacy or Doctor’s Office


Which of these locations have you previously tried to register for a vaccine appointment? (%)

- Retail pharmacy: 21%
- Doctor’s office: 19%
- Community pharmacy: 16%
- Hospital: 15%
- Mass vaccination site: 14%
- Through my insurance provider: 10%
- Major retail location: 10%
- Through my employer/workplace: 10%
- Urgent care facility: 9%
- Vaccine phoneline: 10%
- Community-based health center: 10%
- Local government website: 8%
- Social media: 8%
- Local college or university: 8%
- Long-term care facility: 8%
- An aggregation website: 8%
- House of worship: 5%
- Other: 17%

36% of respondents have tried at least once at one or both of these locations.
VACCINATE ADOLESCENTS TO PROTECT OUR FAMILIES
The recent decision to approve the Pfizer COVID-19 vaccine for emergency use authorization (EUA) with 12- to 15-year-olds opens another promising path to 70% vaccination of the broader population. Besides offering protection to another segment of the population, the approval expands the reach of the vaccine to more Americans, increasing overall community protection and reducing COVID-19's ability to spread.

Before the EUA was officially announced, we asked survey respondents who were parents if they would vaccinate their teenagers. We found a strong correlation between parents’ vaccine eagerness and their plans for their own children. (See Exhibit 8.) As a result, achieving a goal of getting at least 60% to 70% of this group vaccinated seems feasible in the short term, with the aid of strong incentives such as school vaccine mandates and access to inoculation through trusted channels such as pediatricians.
Exhibit 8 | Parents’ Hesitancy to Vaccinate Their Children Correlates with Their Own Vaccine Status

If an FDA-authorized vaccine against COVID-19 were available to your 12- to 17-year-old child(ren) today at no cost, how likely would you be to have them get it?

<table>
<thead>
<tr>
<th>Have 12- to 17-year-old child(ren) (n = 448)</th>
<th>Already vaccinated</th>
<th>Eager</th>
<th>Maybe</th>
<th>Unlikely</th>
<th>Definitely not</th>
</tr>
</thead>
<tbody>
<tr>
<td>Parents who are</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Strongly hesitant</td>
<td>56%</td>
<td>24%</td>
<td>10%</td>
<td>5%</td>
<td>4%</td>
</tr>
<tr>
<td>Maybe</td>
<td>27%</td>
<td>46%</td>
<td>17%</td>
<td>15%</td>
<td>4%</td>
</tr>
<tr>
<td>Unlikely</td>
<td></td>
<td>4%</td>
<td>2%</td>
<td>6%</td>
<td>2%</td>
</tr>
<tr>
<td>Definitely not</td>
<td></td>
<td>8%</td>
<td>20%</td>
<td>20%</td>
<td>46%</td>
</tr>
</tbody>
</table>

Source: BCG National Vaccine Sentiment Survey, April 20–25, 2021 (n = 448).
Note: Because of rounding, some of the percentages in the bar charts do not add up to 100%.
THE END OF THIS PHASE IS IN SIGHT
Undeniably, vaccinating the remaining US population will be difficult. The challenge has been on leaders’ minds since December, and no silver-bullet solution is likely to emerge. But by maintaining the pace to vaccinate the eager, the hesitant, and newly eligible teenagers, the government can meet its goal of achieving 70% coverage of the eligible US population. COVID-19 certainly won’t disappear from the world in the short term, but minimizing the disease burden and transitioning to a new post-pandemic reality should be a rallying cry leading up to an incredible July 4 celebration.
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About the Research

BCG’s COVID-19 Vaccine Sentiment series is based on data drawn from an online survey of consumers that is conducted every few weeks across a representative sample of the United States. The survey is produced by the authors in partnership with coding and sampling provider Dynata, the world’s largest first-party data and insights platform. The goal of the research is to provide our clients and businesses around the world with periodic barometer readings of COVID-19-related vaccine sentiment to inform rebound planning, vaccine rollout operations, and decision making. A team composed of BCG consultants and experts from BCG’s Center for Customer Insight completes the survey analytics.
We would like to thank key contributors to this article:

**BCG Global COVID Response Team:**
John Rose, Tristan Hunt, Laura Mast, and Ian Faucher

**BCG Center for Customer Insight:**
Greg McRoskey and the rest of the global team
COVID-19 Disclaimer

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