



CIGNA INTERNATIONAL COVID-19 VACCINE PERCEPTION STUDY

Perception of the safety and acceptance of vaccines improving

JUNE 2021

EXECUTIVE SUMMARY

This report, the second in a 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.

- Our findings show mainly positive trends month on month, with vaccine acceptance increasing from 63% to 66% and 60% of people believing the COVID-19 vaccines will be readily available to them, an increase of 2%.
- While acceptance of COVID-19 vaccines and their safety continues to improve, a number of notable differences remain between markets and generations, particularly in markets where vaccination rates are lower.
- There continue to be significant numbers of people who are concerned about COVID-19 vaccines. It will be critical in the markets where this remains a challenge that the local health authority and government factor this into their public information campaigns, as they remain overwhelmingly the most trusted source of information for people.
- Notably, although the vast majority of our respondents use social media platforms, they are the most trusted source for just 5% of people vs 39% for government bodies and 19% for the family doctor – demonstrating the importance of communications through these channels.

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There is much for us to be positive about in the second report from our COVID-19 Vaccine Perception Study. The research shows that the vaccine rollout is progressing well, with a quarter of people in our sample now vaccinated and that people's personal experience of the vaccine is having a positive impact on perception.



The social acceptance and social norms relating to vaccination play an important part in whether people trust the vaccine, so being vaccinated, or knowing someone who has been vaccinated, leads to more positive views of the vaccine. 83% of those vaccinated trust COVID-19 vaccines are safe, whereas only 46% of those unvaccinated feel the same. As you would expect challenges remain, but the conclusion is that the vaccine rollout is having a positive impact on the perception of the vaccines and their safety.

When our first set of findings was published, I said that understanding more about how people feel about vaccines will help us to better meet the needs of our customers, providing the information and support they need to improve their health, well-being and peace of mind in these unprecedented times. This latest report emphasizes that to experience a new clinical solution, in this case a vaccine, builds peoples trust in it, it is normal human instinct to question the new, and it is our responsibility to play a role in helping to educate and provide the facts.

The research shows that the top three most credible sources from which to obtain COVID-19 information include healthcare providers. So I would like to take this opportunity to thank doctors and scientists across the world, as it is their knowledge and expertise that has underpinned the world's response to the pandemic and continues to inform the support and advice we offer to our customers.

Overall Cigna International celebrates the progress highlighted in this report, but recent experiences in several markets reiterate we cannot be complacent in how we manage this terrible virus. The progress we are seeing is a result of the hard work and dedication of healthcare professionals, it is this which is having a real and positive impact on the fight around the perception of the COVID-19 vaccine.



Jason Sadler, President, Cigna International Markets

METHODOLOGY

- Data collected between 16th – 20th April, 2021
- 13,387 respondents
- Aged 18 or over
- Markets: China, Hong Kong, New Zealand, Singapore, South Korea, Spain, Taiwan, Thailand, UAE, UK and USA
- 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.



POSITIVE TRENDS IN OUR RESEARCH

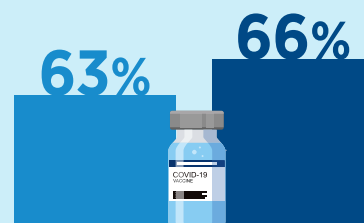
VACCINE ACCEPTANCE AND PERCEPTION OF SAFETY ARE IMPROVING

In this second report, we want to highlight the positive trends we are seeing. The overall rates of vaccine acceptance have increased from 63% to 66% in a single month, markets where improvements have been seen include China, Singapore, Thailand and Spain. The ongoing successful rollout of vaccines in a number of markets means that overall, 6 out of 10 respondents now believe the vaccine will be available to them, a month on month increase of 2%. This is good news for governments as it reflects improving confidence in their vaccine rollout programs.

This month's data also shows that 55% of respondents now believe COVID-19 vaccines are safe. This is driven in part by the increased number of people who have already been vaccinated, across the 11 markets we studied, 1 in 4 of the people surveyed have now received at least one shot of vaccine.

Key positive improvements

Vaccine acceptance has increased from 63% to 66% across 11 markets



OUR RESEARCH BUSTS SOME OF THE MYTHS SOCIAL MEDIA IS NOT A TRUSTED SOURCE.



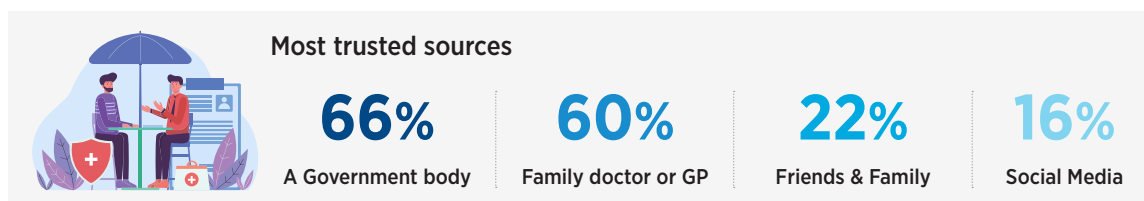
Throughout the pandemic much has been written about how misinformation on social media could present a major challenge to the successful handling of the pandemic and the vaccine rollout. However our research shows social media is the most trusted source of information for just 5% of people despite the fact that most of our respondents use social media platforms.

Overall, social media is behind government bodies, family doctors, TV news and friends & family. Although in the 18-34 age bracket social media is the fourth most trusted source, for the over 35s it falls to the seventh most trusted source. There is a marked difference between generations on this, with 7% of 18-34 year-olds saying it is their most trusted source, while in the over 55s this number falls to just 2%.

This has implications for the later stages of the vaccine rollout program in each market as governments try to reach an ever younger demographic, there will be value in targeting some of these groups through the social media channels they trust, ideally with information that shows their peers receiving the vaccine – as set out in the section below.

GOVERNMENT AND HEALTH AUTHORITIES CONTINUE TO BE OUR MOST TRUSTED SOURCE

The good news for government bodies, including health authorities, is their information is trusted more than any other source. With almost double the number of people in every generation putting more trust in their government bodies than in the next most trusted source of information. Our research also shows that those people with the most experience of the vaccine, the over 45s, now trust government information more, with a 2% increase in trust for government information compared to last month.



MAJOR CHALLENGES REMAIN

SOME MARKETS WORRIED ABOUT VACCINE SAFETY

The difference between markets is striking and several markets face a particular challenge in improving the perception of COVID-19 vaccines. In South Korea for example, just 32% of respondents agreed the COVID-19 vaccines available are ‘very safe’, this compared to 80% in the UK and 78% in the UAE. While there are positive trends in Spain, which in April saw more vaccines administered than in the first three months of the year, resulting in a 7% increase of respondents agreeing that COVID-19 vaccines are safe, rising to 61%. For other markets the percentages on whether the COVID-19 vaccines available are very safe stayed consistent with our first wave of research.

The markets where concerns about the safety of COVID-19 vaccines remain high include Taiwan, Thailand and Hong Kong, all of which had less than 40% of respondents agreeing they are safe.

To communicate the facts about its safety effectively and encourage vaccine uptake, it will be critical the authorities in these markets target their public information campaigns through the most trusted channels in the respective markets to have the greatest impact.

KNOWLEDGE ABOUT THE VACCINE VARIES BETWEEN MARKETS

Knowledge of the vaccine remains a challenge, in New Zealand, a market widely acknowledged as having successfully managed the pandemic, 46% of respondents said they did not know enough about COVID-19 vaccines, this compared to the UK where only 19% of people believed they didn't know enough. This reflects several factors, with the vaccine rollout being the primary one, in the UK 60% of our respondents were vaccinated, in stark contrast to just 5% in New Zealand.

Concerns about side effects correlate to not knowing people who have been vaccinated. In Thailand 78% of people are concerned about side effects, an increase of 5%, this compares to the UK where that number fell to 27%, in Thailand 67% of our respondents aren't vaccinated and don't know anybody who has been vaccinated, in the UK that figure is just 2%. These marked differences reflect the different progress in vaccine rollout between markets and we would expect these gaps to narrow, as more people receive a vaccine over the coming months.

“Our research shows people increasingly understand and trust COVID-19 vaccines. We know that vaccination is a critical part of ending this pandemic. The science demonstrates the overwhelming effectiveness of vaccines to prevent severe COVID-19 infections, hospitalizations and even death. Getting vaccinated is the most important thing for us to do, not just for ourselves, but for those we love. Our advice is clear, get vaccinated as soon as you can!”

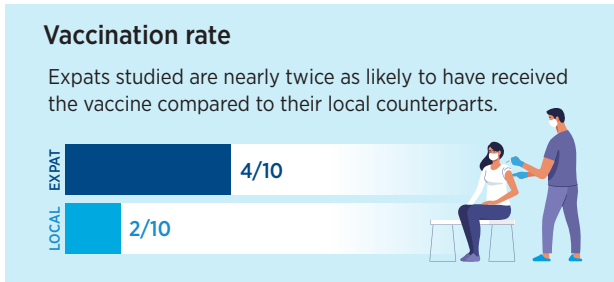
Dr. Daniel Ober, Medical Officer, Cigna International Markets Americas



POSITIVE EFFECT OF PERSONAL EXPERIENCE

For this latest wave of research, we wanted to focus on the impact of personal experience with vaccines. To this end we asked our respondents if they have been vaccinated, or did they know anyone who had been vaccinated. The highest concentration of vaccinated respondents is unsurprisingly found in the UK (60%), UAE (58%) and USA (49%). These three markets are all

running successful vaccination programs, which is borne out in our data. Again, the differences between markets are noteworthy, in Taiwan 80% of respondents are not vaccinated and also don't know anyone vaccinated, in the UK this figure is just 2%. In the UAE 24% of our respondents have personally been vaccinated, with all the associated implications that has for the findings, whereas in South Korea, Thailand, Taiwan and New Zealand that number is just 3% or lower.



DRIVING IMPROVED PERCEPTIONS

Respondents with favorable views of the vaccine are more likely to have received the vaccine, than those with poor expectations of the vaccine. The rate of vaccination directly correlates to less concern about side effects and stronger belief in the safety of COVID-19 vaccines. Knowing someone who has been vaccinated tends to trend closer with positive views of the vaccine, as compared to not knowing anyone on close terms who has been vaccinated. As you would expect the research is clear that respondents with favorable views of the vaccine are more likely to have received the vaccine, than those with poor expectations of the vaccine, 83% of those vaccinated trust that the vaccine is safe, while only 46% of those unvaccinated feel the same.



COMMUNITY MESSAGES REMAIN STRONG

Although there are significant differences between the markets in terms of their attitudes to vaccinations – ranging from the UK, where 87% state they have a positive view of the COVID vaccines, to Hong Kong where only 40% say the same – there is shared concern across all markets surveyed about the importance of protecting their communities. Globally, 75% of people say they are concerned about spreading the virus to others – higher than the 66% who say they have a positive attitude to the vaccines. Interestingly, the two markets with the lowest favorability toward the COVID vaccines, Hong Kong and Taiwan, have amongst the highest concern for protecting their community, at 81% and 86% respectively. This highlights how important it is that governments and other information sources explain how the vaccines help protect both individuals and broader society.



SUMMARY OF KEY FINDINGS

- Vaccine rollout progressing well – across the markets we surveyed, our research shows the vaccine rollout is progressing well, with over 3,000 people in our sample, or 25% of the total now vaccinated.
- Personal experience has positive impact on perception – the research shows the relationship between the vaccine rollout program and improvements in vaccine confidence and trust. This is good news for health authorities, as the vaccine rollout program should address many of the negative perceptions, as the confidence of people improves when they, and their friends and family start successfully receiving the vaccine.
- Celebrate success – it is important for governments to keep communicating that success as it will help to assuage vaccine hesitancy.
- Social media is not the problem we feared – despite the perception, very few people trust social as their best source of information on COVID-19 vaccines.

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

The sustained nature of the pandemic, and the shift it 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 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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