

Quantum
Market
Research

Sentiment Towards COVID-19 Vaccine Research

Department of Health

Report | March 2021

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THE FREEDOM OF INFORMATION ACT 1982 (C/T/H)
BY THE DEPARTMENT OF HEALTH



Research methodology



- Online survey conducted via an online research panel



- Questions relating to the COVID-19 vaccine were included in Quantum's AustraliaNOW survey – a weekly survey of 1,000 Australians tracking attitudes and behaviours during the COVID-19 pandemic.



- Nationally representative sample by age, gender and location (State)
- Total sample size of n=1,000 per wave

Fieldwork dates:



- Wave 1: 2nd – 6th October 2020
- Wave 2: 5th – 9th November 2020
- Wave 3: 3rd – 7th December 2020
- Wave 4: 14th – 16th January 2021
- Wave 5: 4th – 8th February 2021
- Wave 6: 4th – 9th March 2021

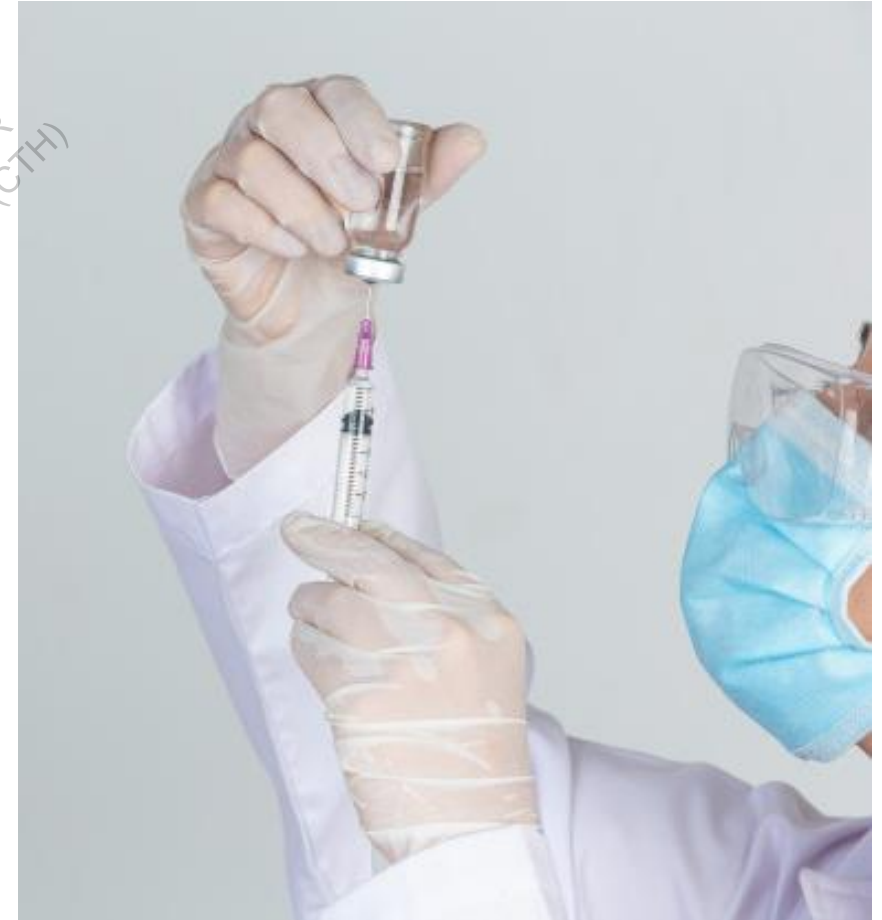
The project was carried out in line with the Market Research International Standard, AS ISO 20252.



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Key take outs

- 1. Overall intention to take up the COVID-19 vaccine has softened slightly, to three-quarters (75%) of Australians.** This is driven largely by those aged under 50 years. It follows the roll-out of the COVID-19 vaccine in Australia (from 21st February 2021), and coincides with an easing of concern over the COVID-19 situation more generally (lowest concern observed since March 2020).
- 2. Confidence in the effectiveness of the COVID-19 vaccines has held steady at 76% somewhat/very confident.** Within this, there is an increasing cohort that are *very* confident in the effectiveness of the vaccines, likely influenced by news reports of high levels of effectiveness in the community in regions (such as Israel and the UK) where large proportions of people have been vaccinated.
- 3. There has been a slight shift in the barriers to vaccine take-up.** While concern over the potential long-term side effects remains the top barrier across all cohorts, there has been a decrease in informational barriers (indicating that information is achieving cut-through) and a drop in concerns over the testing process. However, a slight increase has been observed in the proportion that don't see the need to be vaccinated.



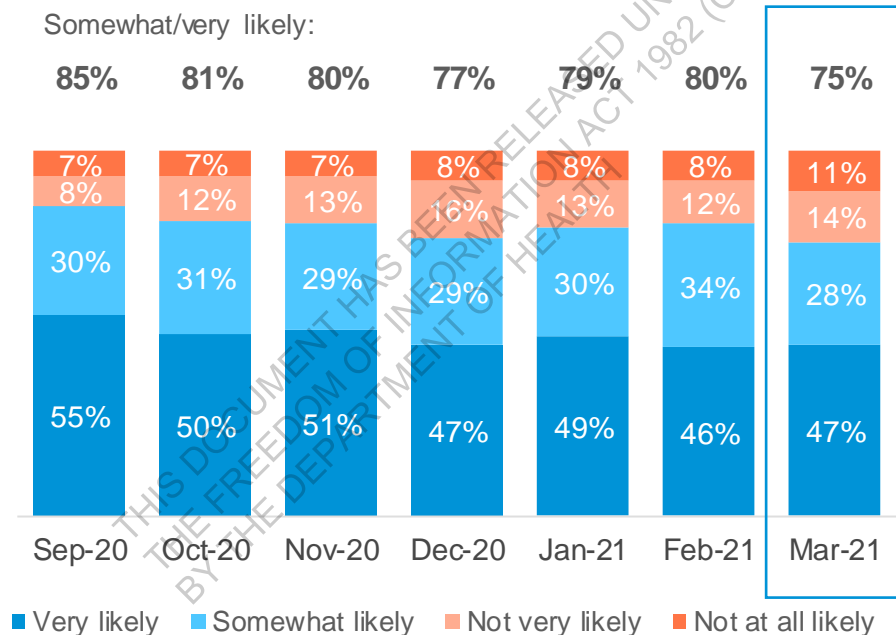
Findings: Sentiment Towards a COVID-19 Vaccine

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Intention to take up the COVID-19 vaccine has softened, with three-quarters of Australians (75%) likely to get vaccinated

- The proportion of Australians that indicate that they are unlikely to get vaccinated has increased to 25%, up from 15% six months ago in September 2020. The proportion strictly opposed to being vaccinated grew from 8% in February to 11% in March.
- This softening of intentions has coincided with the introduction of the vaccine to Australia (21 Feb) and a further easing of concern over the coronavirus situation, following a period of no major outbreaks.

Likelihood to take up coronavirus vaccine (By month)



'I've already had the COVID-19 vaccine': 0.4% in March

March 2021:

75% somewhat/very likely

| BY STATE | Monthly change (percentage points) |
|--------------------|------------------------------------|
| NSW (78%) | -6 |
| VIC (74%) | -4 |
| QLD (73%) | +4 |
| SA (64%) | -25 |
| WA (73%) | -10 |
| BY REGION | |
| Metropolitan (73%) | -7 |
| Regional (77%) | -2 |
| BY GENDER | |
| Male (78%) | -8 |
| Female (71%) | -3 |
| BY AGE | |
| 18-29 (68%) | -8 |
| 30-39 (72%) | -5 |
| 40-49 (69%) | -9 |
| 50-59 (77%) | -1 |
| 60+ (85%) | -2 |

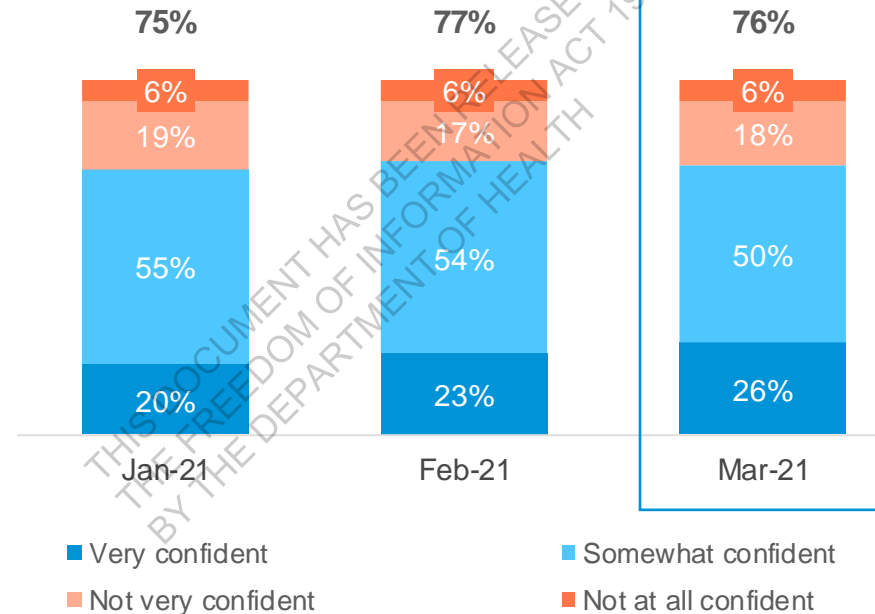
Base: Australians, n=1,003 (March 2021 – AustraliaNOW). Note: New statement added March 2021 to capture those who have already had the vaccine (vaccine introduced to Australia on 21 Feb). State: NSW n=308; VIC n=256; QLD n=215; SA n=80; WA n=98. Region: Metropolitan n=665; Regional n=338. Gender: Male n=488; Female n=512. Age: 18-29 n=236; 30-39 n=193; 40-49 n=162; 50-59 n=155; 60+ n=257. Q10g. If a government-approved vaccine to prevent or minimise the severity of coronavirus/COVID-19 was available to you right now at no cost, how likely would you be personally to get vaccinated?

Confidence in the effectiveness of the COVID-19 vaccines has held steady at 76% somewhat/very confident

- In March, just over three-quarters of Australians (76%) feel confident that the COVID-19 vaccines that have been developed will be effective.
- Within that, a quarter (26%) feel very confident that the COVID-19 vaccines will be effective – up 6 percentage points from January.
- This is off the back of news reports suggesting high levels of effectiveness in regions of the world (such as Israel and the UK) that have vaccinated high proportions of the community*.

Confidence that the COVID-19 vaccines will be effective (By month)

Somewhat/very confident:



March 2021:

76% somewhat/very confident

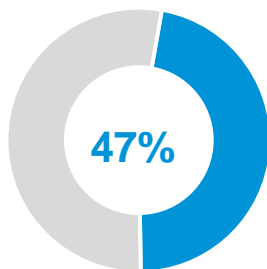
| BY STATE | Monthly change (percentage points) |
|--------------------|------------------------------------|
| NSW (81%) | -1 |
| VIC (75%) | 0 |
| QLD (72%) | -3 |
| SA (66%) | -14 |
| WA (73%) | +4 |
| BY REGION | |
| Metropolitan (77%) | 0 |
| Regional (75%) | -3 |
| BY GENDER | |
| Male (81%) | -3 |
| Female (71%) | 0 |
| BY AGE | |
| 18-29 (68%) | -8 |
| 30-39 (78%) | -1 |
| 40-49 (71%) | -1 |
| 50-59 (75%) | +3 |
| 60+ (86%) | +2 |

Base: Australians, n=1,003 (March 2021 – AustraliaNOW).

*Source: <https://www.smh.com.au/national/the-first-real-world-data-for-covid-vaccines-is-in-and-it-s-really-good-news-20210306-p578d5.html>

State: NSW n=308; VIC n=256; QLD n=215; SA n=80; WA n=98. Region: Metropolitan n=665; Regional n=338. Gender: Male n=488; Female n=512. Age: 18-29 n=236; 30-39 n=193; 40-49 n=162; 50-59 n=155; 60+ n=257. Q10m. How confident are you that the coronavirus/COVID-19 vaccines developed will be effective?

Concerns among those that are *very likely* to get vaccinated against COVID-19 have eased



Very likely to get vaccinated against COVID-19

(Mar-21)

- Among those ‘very likely’ to be vaccinated’ (47% of Australians), the biggest concern continues to be the potential long-term side effects.
- However, concern has dropped significantly among this cohort in March (with a 12 percentage point drop in those expressing concerns).



Concerns about being vaccinated

Those very likely to get vaccinated

Monthly change (percentage points)

| | | |
|---|-----|-----|
| Unsure of long-term side effects | 30% | -1 |
| Process feels rushed | 17% | -2 |
| Don't know enough about it yet | 15% | -5 |
| Unsure of short-term side effects^ | 13% | -6 |
| I would want to wait until others have had it first | 13% | -6 |
| I feel there is inadequate testing/research | 12% | -3 |
| I believe the vaccine could be unsafe | 7% | -3 |
| I believe a vaccine won't be effective for this virus | 5% | -2 |
| I feel the risk/threat from COVID-19 is low | 5% | -4 |
| I am allergic/have had reactions from vaccines | 3% | -4 |
| I don't feel the need to get the vaccine | 2% | +2 |
| Don't believe in vaccinations/anti-vaccination | 1% | -3 |
| Other | 3% | -1 |
| None | 45% | +12 |

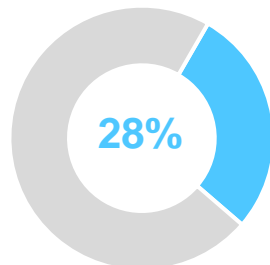
Selected any concerns

55% **(-12)**

Mar-21 Monthly change (percentage points)

Base: Very likely to get vaccinated against COVID-19, n=469 (March 2020 – AustraliaNOW). ^Note: New statement added February 2021 relating to side effects in the days following vaccination. Q10I. What concerns, if any, do you have about being vaccinated against COVID-19?

Informational barriers among those *somewhat likely* to be vaccinated have declined



Somewhat likely to get vaccinated against COVID-19

(Mar-21)

- Within the cohort that are 'somewhat likely' to get vaccinated, the proportion that indicated that they 'don't know enough about the vaccine yet' has declined.
- This suggests that information on the available COVID-19 vaccines is beginning to achieve cut-through and the public feel more informed.



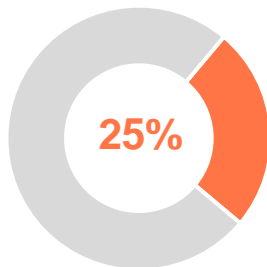
Barriers to vaccination consideration

Those somewhat likely to get vaccinated

| | | Monthly change (percentage points) | 3-monthly change (percentage points) |
|---|-----|---------------------------------------|---|
| Unsure of long-term side effects | 42% | +2 | +2 |
| I would want to wait until others have had it first | 36% | -1 | +3 |
| Don't know enough about it yet | 32% | -5 | -14 |
| Process feels rushed | 26% | -6 | -3 |
| Unsure of short-term side effects^ | 26% | +1 | N/A |
| I feel there is inadequate testing/research | 23% | -3 | -10 |
| I believe the vaccine could be unsafe | 17% | -1 | -2 |
| I feel the risk/threat from COVID-19 is low | 14% | +3 | +1 |
| I believe a vaccine won't be effective for this virus | 10% | -3 | +1 |
| I am allergic/have had reactions from vaccines | 8% | 0 | -2 |
| I don't feel the need to get the vaccine | 8% | 0 | +1 |
| Don't believe in vaccinations/anti-vaccination | 3% | -2 | -2 |
| Other | 3% | +1 | 0 |
| None | 10% | +4 | 0 |

Base: Somewhat likely to get vaccinated against COVID-19, n=278 (March 2020 – AustraliaNOW). ^Note: New statement added February 2021 relating to side effects in the days following vaccination. Q10I. Which of the following (if any) are preventing you from considering being vaccinated against COVID-19?

An increasing proportion of those *unlikely* to be vaccinated don't see the need to get the vaccine



Not very/not at all likely to get vaccinated against COVID-19
(Mar-21)

- Among this particular cohort (representing 25% of Australians), the main barrier continues to relate to potential long-term side effects.
- However, an increasing proportion are questioning the need to be vaccinated (up 7 percentage points month-on-month).

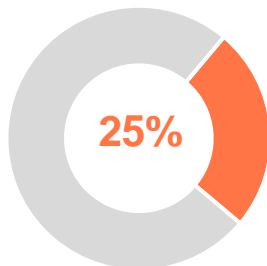


Barriers to vaccination consideration Those not very/not at all likely to get vaccinated

| | | Monthly change (percentage points) | 3-monthly change (percentage points) |
|---|-----|---------------------------------------|---|
| Unsure of long-term side effects | 53% | -7 | -5 |
| I feel there is inadequate testing/research | 47% | -4 | -3 |
| Process feels rushed | 46% | -5 | -1 |
| Don't know enough about it yet | 38% | -8 | -7 |
| I believe the vaccine could be unsafe | 37% | -5 | -3 |
| Unsure of short-term side effects^ | 33% | -8 | N/A |
| I would want to wait until others have had it first | 27% | -10 | -8 |
| I don't feel the need to get the vaccine | 23% | +7 | +3 |
| I believe a vaccine won't be effective for this virus | 22% | 0 | +5 |
| I feel the risk/threat from COVID-19 is low | 16% | 0 | -6 |
| Don't believe in vaccinations/anti-vaccination | 9% | +1 | -1 |
| I am allergic/have had reactions from vaccines | 8% | -1 | +2 |
| Other | 6% | +3 | +1 |
| None | 3% | 0 | -4 |

Base: Not very/not at all likely to get vaccinated against COVID-19, n=252 (March 2020 – AustraliaNOW). ^Note: New statement added February 2021 relating to side effects in the days following vaccination. Q10I. Which of the following (if any) are preventing you from considering being vaccinated against COVID-19?

Reassurance of the safety of the vaccine outside of the lab environment is key for opening up consideration



Not very/not at all likely to get vaccinated against COVID-19
(Mar-21)



What would encourage you to consider being vaccinated?

Those not very/not at all likely to get vaccinated

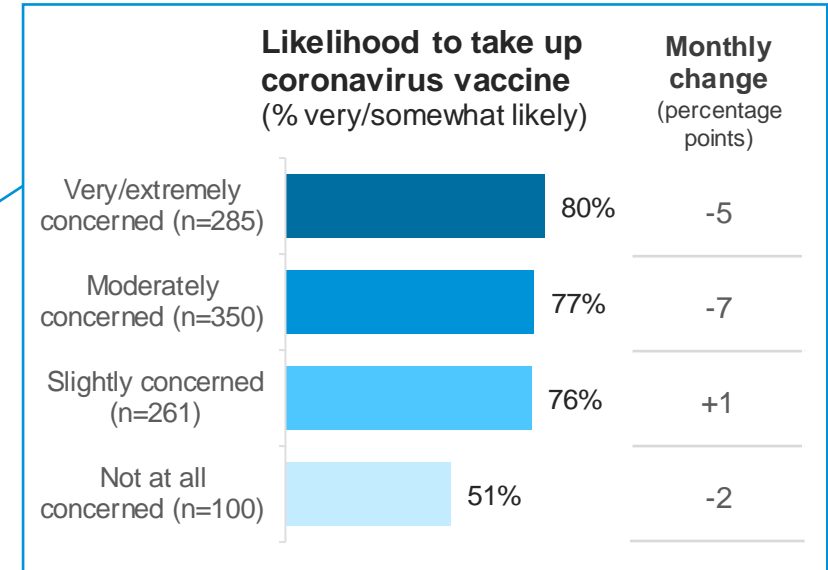
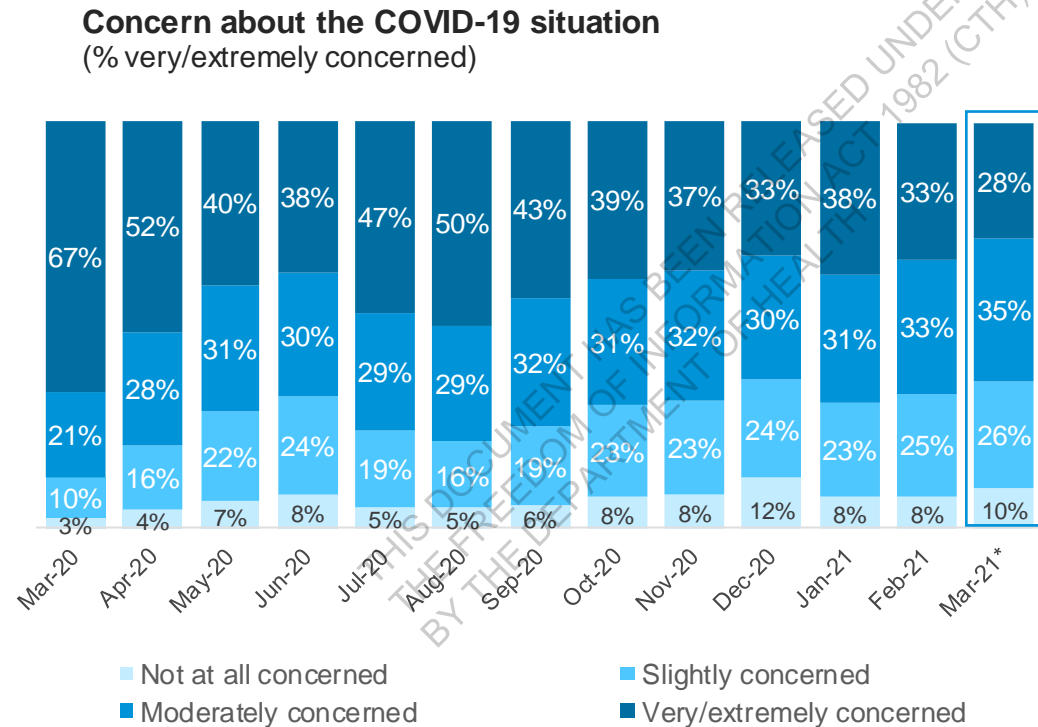
| | Mar-21 | Monthly change (percentage points) |
|---|--------|------------------------------------|
| If I felt confident that it was safe for me to get the vaccine | 29% | -7 |
| If large numbers of Australians had been safely vaccinated against COVID-19 | 25% | -5 |
| If large numbers of people around the world had been safely vaccinated against COVID-19 | 21% | -4 |
| If COVID-19 vaccines were shown to be reducing the number of people getting severe symptoms or dying | 19% | -2 |
| If a COVID-19 vaccine was required for overseas travel | 17% | -1 |
| If it meant I didn't have to quarantine on arrival or return when travelling interstate or overseas | 13% | -2 |
| If vaccination helped us to get back to normal life more quickly | 13% | -1 |
| If it gave me more freedom to travel within Australia | 12% | +1 |
| If vaccination helped Australia's economy recover | 10% | +2 |
| If there were changes to my health that made me more at risk from COVID-19 | 9% | -4 |
| If I was required to interact more in person with the public and/or vulnerable/immuno-compromised people | 9% | -2 |
| If it meant I didn't have to self-isolate if there was a local outbreak of COVID-19 | 9% | -1 |
| If my workplace/ employer gave me time off to get vaccinated (and recover if I had side effects) | 8% | +2 |
| If there was community transmission of COVID-19 in my local area | 7% | -3 |
| If many of my family and/or social circle had been vaccinated for COVID-19 | 4% | -6 |
| Other | 4% | +2 |
| None | 28% | +5 |

- There were no major changes between February and March, with the dominant motivator continuing to relate to reassurance of safety beyond the lab and within the community (particularly within the Australian community).

Base: Not very/not at all likely to get vaccinated against COVID-19, n=252 (March 2020 – AustraliaNOW).
Q10n. Which of the following (if any) would encourage you to consider being vaccinated against COVID-19?

Community concern about the COVID-19 situation is at its lowest point since March 2020

▪ The proportion of Australians that are very/extremely concerned about the COVID-19 situation has decreased to 28% in the first week of March, from 33% throughout February.



Q8 - Firstly, how concerned are you about the Coronavirus/Covid-19 situation in general? *Note: first week of March only
 All respondents, n=c.980-7,300 per month. 'Don't know' responses excluded.

About the research

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Respondent profile

Nationally representative sample by age, gender and location.

N=1,000 per wave

| Wave same size | N= |
|----------------|-------|
| March 2021 | 1,003 |
| February 2021 | 1,001 |
| January 2021 | 1,002 |
| December 2020 | 1,001 |
| November 2020 | 1,000 |
| October 2020 | 1,006 |

Quotas and weighting

Quotas were applied to ensure a representative spread of responses by gender, age and State. Data has also been weighted by State and gender to achieve a representative profile.

Sample accuracy

The results are based off a total sample size of n=1,000, yielding a maximum margin of error of +/-3.1% (at the 95% confidence interval). This means that for a result of 50%, we can be 95% confident that the result in the actual population will range between 46.9% and 53.1%.

| November 2020 | Proportion of sample (weighted %) | Number of respondents (n=) |
|---------------------------------|-----------------------------------|----------------------------|
| Total | 100% | 1,003 |
| Gender | | |
| Male | 49% | 488 |
| Female | 51% | 512 |
| Gender fluid/diverse/non-binary | 0% | 3 |
| Age | | |
| 18 – 29 years | 23% | 236 |
| 30 – 39 years | 19% | 193 |
| 40 – 49 years | 17% | 162 |
| 50 – 59 years | 16% | 155 |
| 60+ years | 26% | 257 |
| State | | |
| NSW | 32% | 308 |
| VIC | 26% | 256 |
| QLD | 20% | 215 |
| SA | 7% | 80 |
| WA | 10% | 98 |
| Other | 5% | 46 |

Appendix I: Survey questions

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Survey questions

Survey questions added to AustraliaNOW from 4th – 9th March 2021.

If a government-approved vaccine to prevent or minimise the severity of coronavirus/COVID-19 was available to you right now at no cost, how likely would you be personally to get vaccinated?

[SINGLE RESPONSE]

- Very likely..... 1
- Somewhat likely..... 2
- Not very likely 3
- Not at all likely..... 4
- I've already had the vaccine..... 5

ASK IF Q2=1-4

[IF Q2=2-4] Which of the following (if any) are **preventing** you from considering being vaccinated against COVID-19?

[IF Q2=1] What concerns, if any, do you have about being vaccinated against COVID-19?

[MULTIPLE RESPONSE]

- I believe the vaccine could be unsafe 1
- I feel there is inadequate testing/research..... 2
- Unsure of short-term side effects in the days just following vaccination 14
- Unsure of long-term side effects..... 3
- Process feels rushed..... 4
- Don't believe in vaccinations/anti-vaccination 5
- Don't know enough about it yet 6
- I am allergic/have had reactions from vaccines..... 7
- I feel the risk/threat from COVID-19 is low 8
- I don't feel the need to get the vaccine 9
- I would want to wait until others have had it first..... 10
- I believe a vaccine won't be effective for this virus 11
- Other (please specify) 12
- None..... 13

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Survey questions

Survey questions added to AustraliaNOW from 4th – 9th March 2021.

ASK IF Q2=3-4 (NOT AT ALL LIKELY/ NOT VERY LIKELY)

Which of the following (if any) would encourage you to consider being vaccinated against COVID-19?

[MULTIPLE RESPONSE, RANDOMISE]

- If there was community transmission of COVID-19 in my local area 1
- If vaccination helped us to get back to normal life more quickly 2
- If vaccination helped Australia’s economy recover. 3
- If I felt confident that it was safe for me to get the vaccine 4
- If large numbers of people around the world had been safely vaccinated against COVID-19..... 5
- If large numbers of Australians had been safely vaccinated against COVID-19..... 6
- If COVID-19 vaccines were shown to be reducing the number of people getting severe symptoms or dying..... 7
- If many of my family and/or social circle had been vaccinated for COVID-19..... 8
- If my workplace/ employer gave me time off to get vaccinated (and recover if I had side effects)..... 9
- If it gave me more freedom to travel within Australia..... 10
- If a COVID-19 vaccine was required for overseas travel 11
- If it meant I didn’t have to quarantine on arrival or return when travelling interstate or overseas 12
- If I was required to interact more in person with the public and/or vulnerable/ immuno-compromised people..... 13
- If it meant I didn’t have to self-isolate if there was a local outbreak of COVID-19 14
- If there were changes to my health that made me more at risk from COVID-19 15
- Other (please specify) 16
- None..... 17

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Survey questions

Survey questions added to AustraliaNOW from 4th – 9th March 2021.

ASK ALL

How confident are you that the coronavirus/COVID-19 vaccines developed will be effective?

[SINGLE RESPONSE]

- Very confident..... 1
- Somewhat confident..... 2
- Not that confident..... 3
- Not at all confident 4

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