

COVID-19 VACCINATION



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EMPOWERING GROWTH

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# Pilot Consumer Survey in India



## Executive Summary

The Government of India has initiated a huge COVID-19 vaccination program in India through a **multipronged strategy**. The strategy to communicate with the population will be critical towards improving the public willingness and mobilization for the vaccination program. As the vaccination program builds up, further **understanding public perceptions and addressing vaccine hesitancy** will be important aspects towards the program.

Continuous and effective communication would help to ensure timely access, accurate and transparent information about the COVID-19 vaccine(s), resulting in adequate awareness and accurate knowledge, thereby facilitating willingness and addressing vaccine hesitancy. Government's communication strategy is also getting added with significant global and local media coverage with multiple media reports, opinions and social media messages on vaccination.

In this environment, where the public is also getting exposed to various diverse media input, opinions and social media messaging, it is important to assess on-the-ground public mindset and perceptions towards vaccination.

1mg and Bureau of Research on Industry & Economic Fundamentals (BRIEF) conducted a virtual survey on the perceptions of COVID-19 vaccine with a **sample size of 30,392 in India**. The survey attempted to explore perspectives towards intent of taking the vaccine, key influencing drivers towards selection of an approved vaccine, willingness to pay and barriers perceived by consumers for getting vaccinated in India.

# Key Takeaways from the survey with a sample size of 30,392 participants across india

## 1. Willingness for Vaccination

**84%** of respondents say they are willing to be immunized against COVID-19. Of this group,

- 28% were living with their family members who are vulnerable, either in terms of their age or have comorbidities
- 22% needed to frequently visit public places

## 2. Vaccine Selection

Amongst respondents who expressed willingness to take the COVID vaccine, key influencing factors were

- Recommendation of the Doctor (**24%**)
- Research evidence on safety (**24%**)

## 3. Vaccine Concerns

Primary concern is side effects: **36%** of the respondents who did not want to take the vaccine feared potential side-effects

## 4. Pricing Perspective

- **42%** of the respondents are willing to spend up to Rs. 500
- **27%** are willing to spend upto Rs 1000

## 5. Other Expectations

**74%** of the respondents expressed they would like to stay updated on the latest information pertaining to the vaccination process



## Survey Methodology

In order to gauge current levels of willingness to receive a potentially safe and effective COVID-19 vaccine and identify correlates of vaccine hesitancy and/or acceptance, a virtual survey of 30,392 respondents was conducted across India.

A nationwide self-administered online survey was conducted in late December 2020 and early January 2021 using a concise and pre-designed questionnaire. The research team used 1mg technology platform to circulate the survey link. It was an anonymous survey, which respondents could choose to complete or not.

Respondents were not given any incentives for participation and could reply only once to the survey. No targeted replies were purchased. Participants could send answers via PC, tablet, or smartphone.

The survey was aimed at Indian users who were interested in looking for information about future COVID-19 vaccines. No other exclusion criteria were applied. The survey was conducted at a time when discussion was particularly intense about the COVID-19 vaccines.

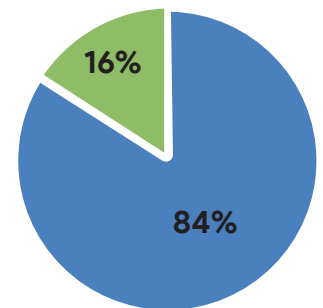
## Results (1/6)

### 84% willing to take COVID-19 Vaccination

When asked “Will you take the COVID-19 Vaccine?”, 84% (25607 of 30392) responded positively, whereas 16% (4785 of 30392) responded as “No” (Table 1).

**Table 1: Willingness to Take the COVID-19 Vaccine in India**

Particular	Response Count	Present of Respondents
Yes	25,607	84%
No	4,785	16%
Grand Total	30,392	100%



Source: 1mg-BRIEF Survey (2020-21)

Majority of the respondents are showing willingness to undergo vaccination, however the perceptions towards the vaccines, influencing factors towards selection of vaccine, etc are points to delve deeper. Consumers are keen in general, but they also have concerns and need to be mobilised through access to consistent transparent communication and effective infrastructure.

## Results (2/6)

### Reason for vaccination : Living with vulnerable family members (28%) & Frequent need to visit public places (22%)

In an attempt to know the underlying reasons for responding as a “yes” to take the COVID vaccine, the survey questionnaire was designed in a way to understand the current level of exposure of respondents to COVID-19 (Table 2).

The majority of respondents (28 percent) who wanted to take the vaccine were those who were living with family members who are vulnerable, either in terms of their age or have comorbidities.

Table 2: Assessing Current Level of Exposure to COVID-19

Particular	Response Count
Living with Family Members who are Vulnerable (e.g. elderly, diabetic, etc.)	28%
Frequent Visit to Public Places (e.g. markets, shopping malls, bus, metro, etc.)	22%
Regular Interaction for Essential Needs (e.g. shopkeepers, delivery boys, etc.)	20%
Working on the Front-line for COVID Care (e.g. healthcare, police, etc.)	11%
Diagnosed with COVID in the Past	6%
Others	13%
Grand Total	100%

Source: 1mg-BRIEF Survey (2020-21)

## Results (3/6)

### Which vaccine to choose: 24% will choose on recommendation by doctor

The survey questionnaire also elicited responses on the key drivers of the responses towards selecting a vaccine in India (Table 3). Out of the respondents who expressed willingness to take the COVID vaccine, nearly 1 in 4 chose to select the vaccine based on the recommendation of the doctor (24 percent of the positive respondents). Research evidence of efficacy and safety were important concerns for as many as 44 percent of the respondents.

**Table 3: Key Influencing Drivers towards Selection of a Government-approved Vaccine**

Particular	Response Count
Recommendation by Doctor	24%
Research Evidence on Safety	24%
Research Evidence on Efficacy	20%
Cost of Vaccine	13%
Country of Origin	9%
Social Influencer (e.g. a health minister taking the vaccine)	7%
Others	3%
Grand Total	100%

Source: 1mg-BRIEF Survey (2020-21)

This implies it is important to first build confidence amongst the doctors, and then leverage them to build public confidence in vaccination. Engagement with doctors may be an effective communication route to address any fears and apprehensions that may exist in the minds of the public.

## Results (4/6)

### Not willing to take vaccine: 36% fear side effects

As the Indian government is set to roll out the vaccination program, many Indians appear hesitant to get vaccinated for COVID-19 and are worried about possible side-effects. Majority of respondents (36 percent) who did not want to take the vaccine were those who feared side-effects (Table 4).

**Table 4: Reasons for Non-Willingness to take Vaccine in India**

Particular	Response Count
Fear of Side Effects of the Vaccine	36%
Not at Risk of Catching the Virus	16%
Not Willing to Pay for Vaccine	10%
Herd Immunity	10%
Social, Personal or Religious belief	4%
No Particular Reason	24%
Grand Total	100%

Source: 1mg-BRIEF Survey (2020-21)



## Results (5/6)

### How much will you pay:

**42% willing to pay upto INR 500, 27% willing to pay upto INR 1000**

The pricing of the new vaccine is one aspect that has shown up as an important factor in determining the willingness or unwillingness of respondents to take the vaccine<sup>1</sup>. The survey reported that around 42 percent of the respondents do not want to spend more than Rs 500 for the vaccine. Around 27 percent of the respondents are willing to spend upto Rs 1000 (Table 5).

**Table 5: Preference for Pricing of COVID Vaccine in India**

Price of the Vaccine	Percent of Respondents
Upto Rs 500	42%
Upto Rs 1000	27%
Upto Rs 1500	10%
Upto Rs 2000	16%
More than 2000	5%
Grand Total	100%

Source: 1mg-BRIEF Survey (2020-21)

Source

1. Lee, B. Y., & McGlone, S. M. (2010). Pricing of new vaccines. *Human vaccines*, 6<sup>6</sup>, 619–626.

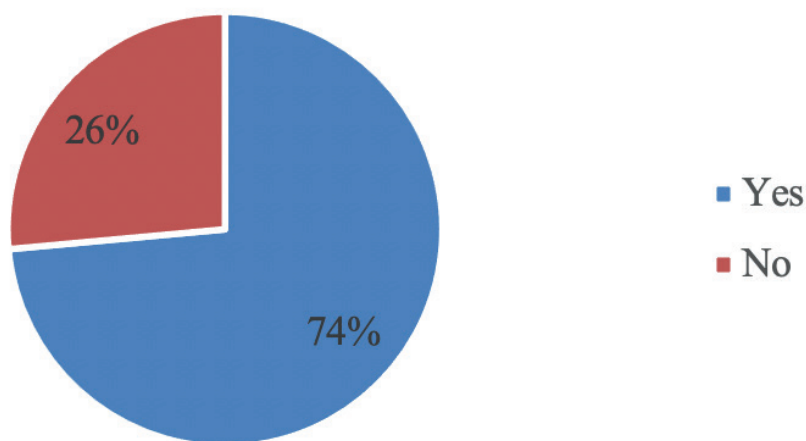
<https://doi.org/10.4161/hv.6.8.11563>

## Results (6/6)

### 74% respondents interested in staying updated on Covid vaccination

The need to stay updated and aware about the latest information on COVID-19 vaccination process in India was seen as holding paramount importance among majority of the respondents. Almost 74 percent of the respondents expressed their willingness to stay updated on the latest information pertaining to the vaccination process. Ensuring transparent flow of information from government and regulatory authority is a key to alleviate fears of the public, apprise them of their actions and bring about the maximum benefits associated with the vaccination process.

**Figure 2: Intent to Stay Updated on COVID-19 Vaccination Program progress**



Source: 1mg-BRIEF Survey (2020-21)

## Limitations of the Survey

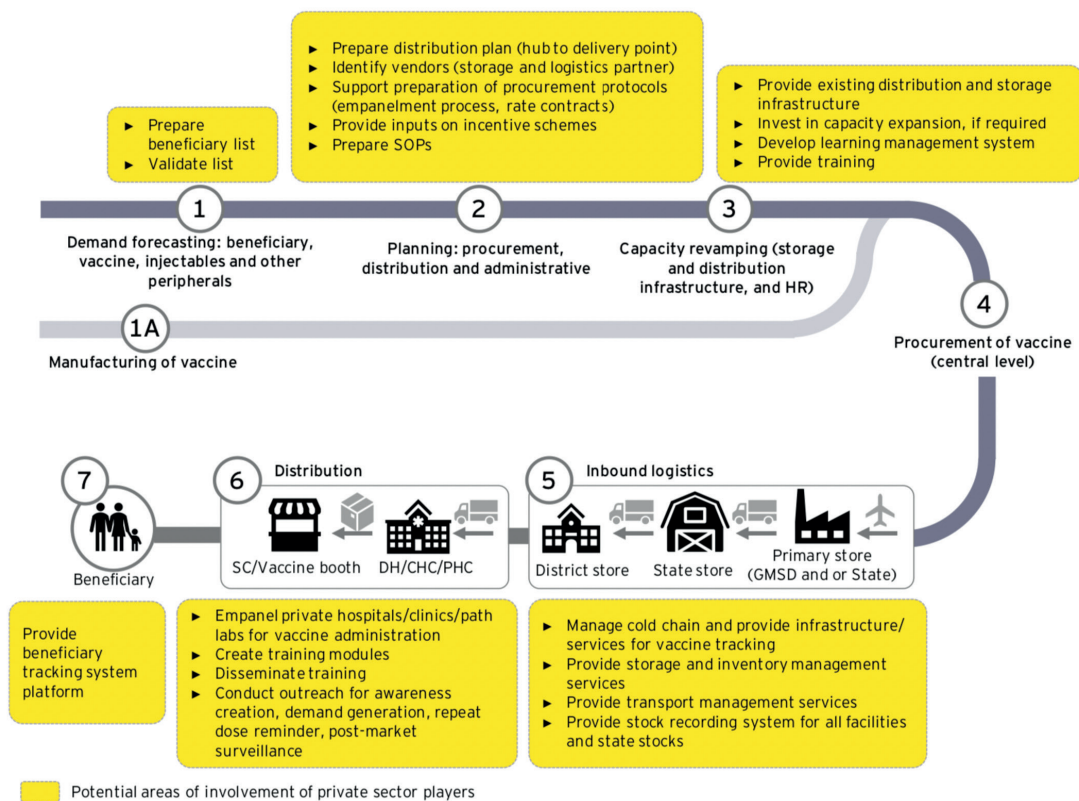
While the survey has been conducted online with a sample size of over 30,000 respondents, the survey had limitations of the sample design and methodology which are necessary to flag:

- ❶ As the survey data was collected at a particular point in time, it was difficult to gauge changes in perception of the public over time. This could have been done if repeated surveys were done at the same sample. This type of repetition would have been difficult to be carried out given the time and resource constraint.
- ❷ Since the survey was conducted online, not all subjects were easily accessible. There is a segment of the population that is less likely to have internet access and to respond to online questionnaires.

## Scope of Public-Private Cooperation in India's Vaccination Drive

As per a recent FICCI-EY Report (2020), there is substantial scope for collaboration between various private players and public units across the value chain to strengthen physical infrastructure, human infrastructure and technological capabilities for accomplishing this mega-scale and ambitious immunization drive. The report illustrates the potential role of private sector in various components of the value chain.

**Figure 3: Potential Collaboration between Public and Private Agencies in India's Vaccination Drive**



Source:

FICCI-EY (2020). *Protecting India: Public Private Partnership for vaccinating against COVID-19*. December 2020.

Available at <http://ficci.in/spdocument/23380/FICCI-EY-COVID%20Vaccine-Strategy-paper.pdf>

**As per the operational guidelines released by the MOHFW on 28th December 2020, the engagement of the private sector is a significant aspect in COVID-19 vaccination.**

The guidelines clearly elucidated that *“the private health sector will be an important stakeholder during the roll out of COVID-19 vaccination across the country and while in the initial stage of the campaign private sector providers will be vaccinated, subsequently they will be engaged in service provision”*.

Sources

- <https://www.mohfw.gov.in/pdf/COVID19VaccineOG111Chapter16.pdf>

## Conclusion

India has made significant progress in developing two vaccines ready for deployment. We hope that the survey findings of this paper will generate insights that will help strengthen public vaccine confidence and contribute to the successful rollout of the country's immunization drive.

The findings of this survey may be indicative but it does open the scope for larger and more detailed assessment of consumer perceptions towards the vaccination in India.



## About 1mg:

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1mg was started with a simple vision of making healthcare affordable, accessible and understandable. With over 160 million annual unique visitors on the platform and over 4 Billion annual page views, 1mg has made its mark across the country for being a pioneer in the digital healthcare space and is amongst the most-trusted players in the segment. 1mg operates India's largest integrated digital healthcare platform where e-pharmacy, e-diagnostics and e-consult services are available to customers at the safety of their doorsteps.

In recent times, 1mg has played a pivotal role in ensuring that the much-needed healthcare services continue to remain accessible to families right from their homes even amidst the pandemic.

For more information, please visit <https://www.1mg.com/>

## About BRIEF:

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Bureau of Research on Industry and Economic Fundamentals (BRIEF) is a New Delhi based research and policy think tank with a focus on international trade and regional cooperation in South Asia. Over the years, BRIEF have partnered with various academia, research institutions, policy groups, think tanks and multilateral institutions to undertake primary survey based research as well as contribute towards policy making and implementation at a domestic and regional level.

It functions as a research partner to institutions such as The World Bank, Foreign, Commonwealth & Development Office (FCDO) UK, The Asia Foundation, Federation of Indian Chambers of Commerce and Industry (FICCI), Confederation of Indian Industry (CII), ICRIER and Conciliation Resources, UK, among others. It has also worked consistently with different departments of the Government of India.

To know more about BRIEF, please visit <http://www.briefindia.com>