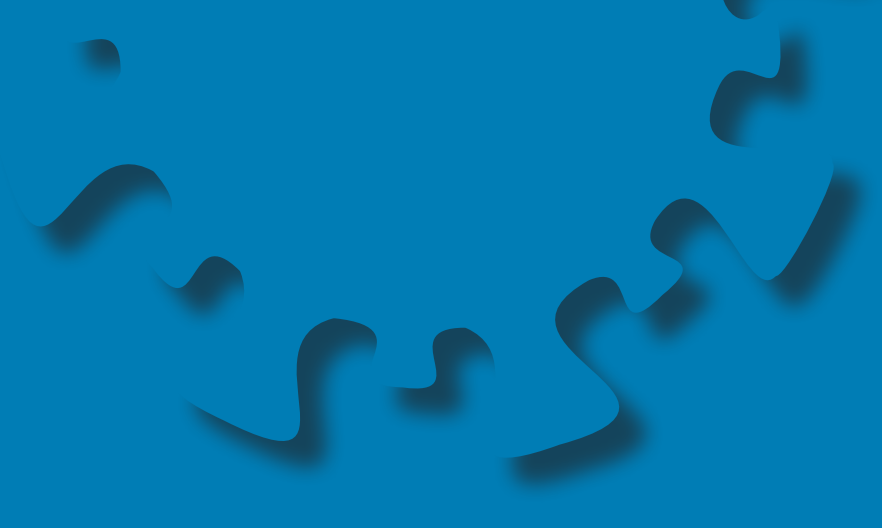


Deloitte.



Listen deeply, respond smartly

An innovative approach
for encouraging population
immunity to COVID-19



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Introduction

Why are some Canadians hesitant about being vaccinated against COVID-19?

Consider the sheer volume of information coming at them, a maelstrom of noise and confusion. What's reliable? What exactly are the rules? How can I tell if a vaccination is safe or not? What should I believe anymore?

No wonder, as one Canadian said, *"I don't know if it's true...but I don't know if it's not true either."*

This state of uncertainty expressed by a participant of a new Deloitte study sums up how some people are feeling about COVID-19 and the vaccines that have been developed to protect people from the virus.

We're all overwhelmed from the toll of the pandemic. The burden keeps getting heavier, in illnesses, lives lost, and the ongoing repercussions of the lockdowns intended to protect us. We're also overwhelmed with information—new scientific evidence, new and changing rules, new variants, new concerns about rare vaccine side effects. For many Canadians, it's leading to decision paralysis about getting vaccinated.

And that presents a major threat. It can result in the continued spread of COVID-19 and delay the broad protection from the virus—when a great enough share of the population is immunized to protect the whole—that is in our sights.

A survey¹ released at the start of 2021, shortly before we undertook our study, showed that up to 40% of Canadians were hesitant to take a COVID-19 vaccine. More recently, in March, another survey² found that 16% are taking a wait-and-see approach, and another 12% said they will not get the vaccine. As vaccine distribution progresses and information is updated, we know these stats will continue to evolve—it's important we continue to monitor them.

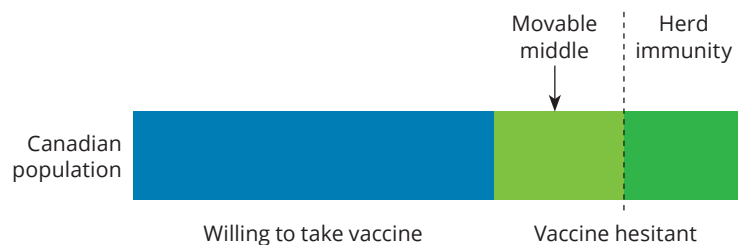
Helping as many Canadians as possible move from uncertainty to confidence is a critical part of reaching herd immunity. The fight can seem like one step forward, two steps back.

What can make a difference? New insight from our study sheds light on public perceptions, and offers solutions to attain the herd immunity that will enable society to start returning to normal.

Shifting a significant percentage of vaccine-hesitant Canadians from uncertainty to confidence will help us achieve herd immunity and break us free from the hold of the virus. This 'movable middle' is key to a successful vaccine rollout.

Health Canada's chief medical advisor notes that while 70% herd immunity would typically be required for a virus of this nature, it may need to be closer to 85%³ to compensate for numerous factors: the presence of highly infectious variants circulating in Canada, the reality that millions of children cannot be vaccinated at this time, and vaccine hesitancy, to name a few. And while statistics indicate that more Canadians are now willing to receive the vaccine if it's available to them, there are variations in willingness between provinces and communities, as first-dose vaccination rates among them reveal.

Motivating those who are on the fence—the *movable middle*—is key to ensuring the greatest protection for all.



¹ Angus Reid, "Itching for injection: Number of Canadians who say they want to be vaccinated ASAP against COVID-19 surges," posted Jan. 11, 2021, <https://angusreid.org/canada-covid-vaccine-january/> accessed April 20, 2021

² Angus Reid, "COVID-19: Canadians' willingness to be inoculated right away increases again as new vaccine approved," posted March 8, 2021, <https://angusreid.org/covid-vaccine-march/> accessed May 1, 2021

³ Treble, Patricia, "Is Canada on track to reach herd immunity?" Maclean's, posted May 10, 2021, <https://www.macleans.ca/news/is-canada-on-track-to-reach-herd-immunity/> accessed May 31, 2021

New strategies required

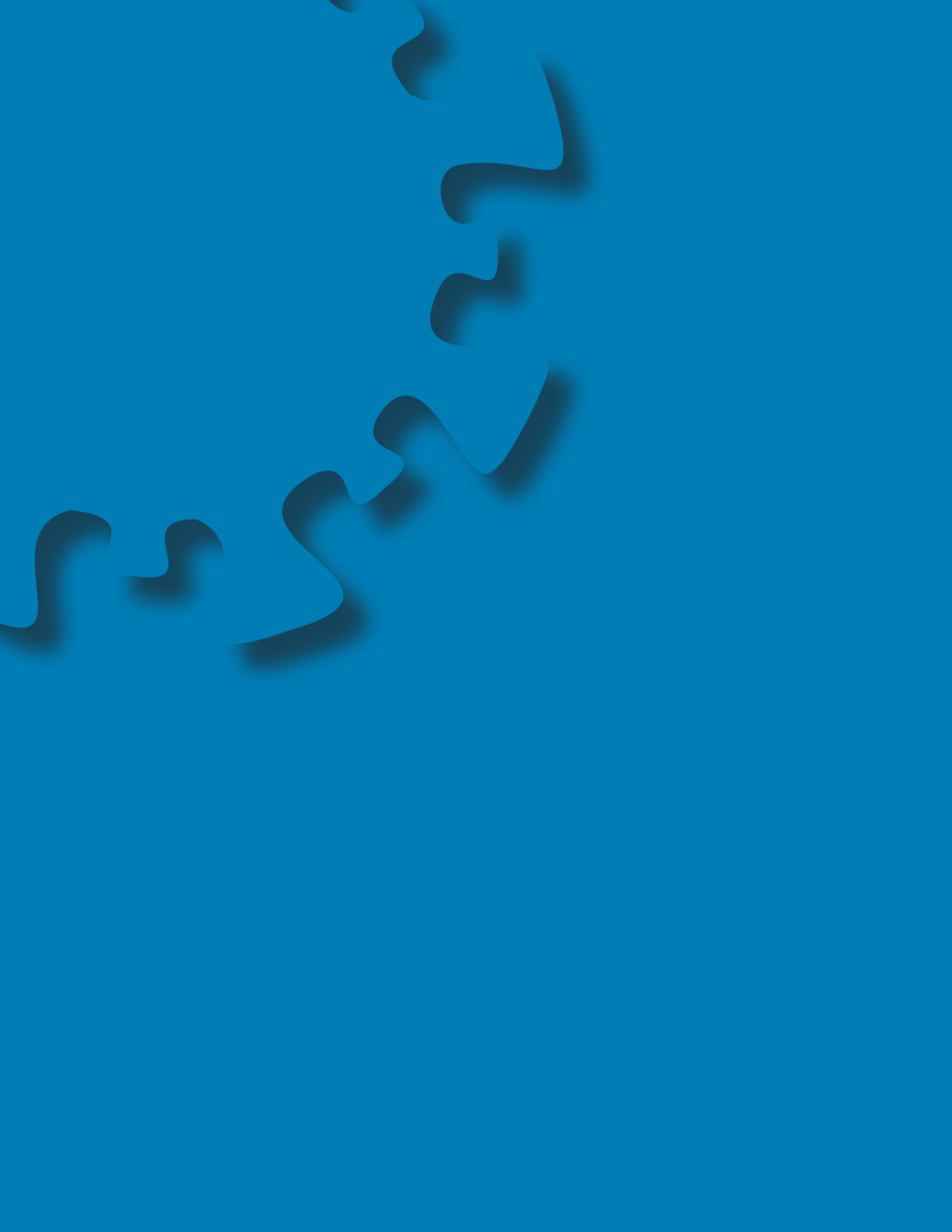
Given the pace and rate of infections, and new variants of concern, governments must employ diverse strategies to get people vaccinated quickly. Public health measures so far have been coloured by a sense of restriction, from limiting gatherings to blanket stay-at-home orders. For some citizens, it can feel as if there has been little carrot and a lot of stick. That has only increased underlying anxieties and constricted the sense of individual agency.

If we want to reduce Canadians' anxieties about getting vaccinated, we need to ground our solutions in how humans make decisions and weigh information. We do it in predominantly emotional and deeply personal ways, and that reflect all sorts of circumstances and experiences. The thought processes that guide behaviours can get messy.

Anyone who wants their messages to break through to vaccine-hesitant Canadians must first understand this: why are they feeling this way?

We set out to answer this fundamental question. To do so, we analyzed a year's worth of social media data and conducted in-depth interviews with a subset of vaccine-hesitant Canadians to probe what's informing their current sentiments.

What we learned can help governments, health-care entities, and the private sector to start taking action today—action that can influence the 'movable middle,' increase the number of people who will be vaccinated, and lead us out of the pandemic.



Understanding differently

First, we employed open-source intelligence collection. Over a two-week period in February 2021, we collected and analyzed 1.7 million social media mentions related to vaccines and vaccine hesitancy made within Canada during the previous 12 months. The collection of forums, blogs, chatter, and other open-source data revealed how information is spreading about vaccines and hesitancy.

Next, we held in-depth interviews with Canadians across socio-demographic groups and situations. Our conversations probed how COVID-19 has affected their lives and the lives of their loved ones. We discussed their influences and information sources, and their past experiences with health care and vaccinations. We also explored their current perceptions and sentiments regarding vaccinations to protect them from the disease.



How we listened and gathered insight

- Collected and analyzed public data in Canada (1.7 million social posts).
- Examined the data using best-in-class social media, open-source intelligence, and network analysis tools.
- Conducted one-on-one, in-depth interviews with Canadians who are hesitant to get vaccinated.
- Generated unique and comprehensive insights of the moment in time.

The power of this approach allowed us to do a deep dive, taking in a great volume of data in a short time, and yield immediate and valuable insights.

Here's what we heard.

1 Social media negativity, misinformation, and disinformation is an enormous challenge

The amount of noise on social media has skyrocketed during the pandemic. Why? People are seeking answers to questions that don't always have answers. And they're not always picky about sources, or able to discern which ones are reputable.

That's not their fault. It can be hard to distinguish between information coming from government, established media, conspiracy theory blogs, uninformed social media influencers, and bad actors intent on spreading outright false information. Sources can all look, feel, and sound legitimate.

Most chatter related to vaccines is neutral. Of the rest, we calculated eight times more negative sentiments than positive ones. The chatter is not just negative but also inaccurate and, to many, alluring. People are already feeling their world is imploding. So many of us are unmoored, and we're clutching for an anchor.

27-35% of the chatter online about vaccines is overwhelmingly negative. That's 8 times the positive sentiments.*

Online, the concept of truth is, to put it charitably, dynamic. Social media is filled with misleading or bogus information about vaccines. That's an important backdrop to understand how people are processing news and making decisions. Misinformation and disinformation are rampant, and they have reach.

Casting doubt

Social media is filled with questions about vaccine quality and potential side effects, which can feed into broader and dangerous conspiracy narratives. Some prevalent themes:

- Vaccines will be forced
- Alternatives (such as hydroxychloroquine) haven't been properly investigated
- Vaccine trials and approvals have been rushed
- Adverse reactions are scary
- Vaccines pose risks, including to children
- Vaccines may lead to sterility
- Worries that the Canadian government is sourcing vaccines from China

2 Fear and loss is turning us inward

Our analysis of the vaccine-hesitant found that fear is widespread. Some people manage the fear head-on, others avoid it, and the rest respond in the range in between. What's clear is that people have felt a loss of control during the pandemic. To some extent, they've also lost trust in the response of the authorities and in societal structure.

Both feelings of loss are understandable. That's causing people to turn inward, and to cling to a sense of security and stability.

In fact, *not* taking the vaccine—or just delaying it—can feel like an act of reassurance. As one person we interviewed said, “It’s a balancing act and the risk of the vaccine feels like stepping into more ambiguity. Right now, I at least have a sense of control.” The decision to delay can therefore serve as a sort of decision in itself—a brief, if fleeting, sense of closure, which can be revisited tomorrow.

A shot of trust

To encourage vaccine acceptance, we need to start with the root condition: trust.

Deloitte has been exploring the idea of trust as the foundation of all relationships. Businesses, governments, and other institutions need to focus on trust with their stakeholders across four major dimensions: physical space and well-being, emotional needs, financial concerns, and information security.

In the case of vaccine hesitancy, consider how there has been a lack of trust in:

- the digital technology around tracking who has the vaccine and how that information will be used; i.e., “vaccine passports”
- spending on vaccine development and distribution
- pronouncements about the safety of certain activities and settings
- the vaccine rollout
- the handling of the pandemic more broadly

All these factors have an impact on trust. Some communities that have been hit hard by the pandemic feel unsupported. We might question decisions made on our behalf regarding our personal freedom to move around, conduct business, and experience life. And we might wonder what to believe, where to turn for unbiased information, and whether authoritative bodies have all the answers.



3 Two main mindsets are driving behaviours

Our analysis revealed two dominant mindsets are informing vaccine hesitancy: *communal* and *individualistic*. Think of the mindsets as internal frameworks that people use to make sense of the world. Like the stories we tell ourselves about how things work.

When it comes to vaccine hesitancy, those with a communal mindset tended to orient decisions around the health and wellness of the group. People with an individualistic mindset, on the other hand, tended to talk about the impacts of COVID-19 on their own personal freedom.

To know what buttons to push to move toward herd immunity, governments first need to grasp how people with specific mindsets think.

Mining the mindsets

We're using the term *mindsets* to refer to the predominant internal mental models people hold at a moment in time. Mindsets are not predictive devices; they are explanatory. They help us understand people's internal versions of reality, and how they make decisions. With that knowledge, we can be better positioned to devise solutions that people can see themselves in.

With regard to COVID-19, we were looking for perspectives on the situation in general and vaccination intentions in particular. In doing so, we recognized that humans are not simple. People don't fit neatly into categories, and their mindsets can shift depending on the context.

The pandemic is today's dominant issue. But there are always matters that demand action by one segment of the population or another. That's why it's so valuable to gain a deep understanding of the mindsets of those affected by any issue.

Different mental models mean that we need to take different, more bespoke approaches to increasing vaccine confidence among those who are in the 'movable middle.' The people in this group aren't adamantly opposed to being vaccinated; they're merely hesitant. The vaccine represents a light at the end of the tunnel. It's just that not everyone wants to be at the front of the line.

What do we mean by communal and individualistic mindsets? Certain definitions might immediately come to mind: that people are either concerned mainly about the greater good or their own interests. But it's much more nuanced than that.

The power of mindsets

The volume and velocity of information has kept coming at us throughout the pandemic.

To make sense of the overwhelming ambiguities, we're defining for ourselves what we value most. Often, that involves trade-offs that we're not used to making. Our mindsets explain a lot.

That's true when it comes to dealing with COVID-19 and getting vaccinated, and any time. Understanding mindsets can help anyone to reach and respond to audiences, no matter the topic. Let's define the power of mindsets.

- **What mindsets are:**
Our latent ideas about "how things work". They provide us with guidance for decisions or actions.
- **What mindsets are not:**
Personas that characterize a discrete segment of a population. Those trace to specific demographics. Mindsets transcend demographics.
- **How mindsets shift:**
The way we think about things is malleable, and so are our mindsets. Depending on the context or the topic, we may use very different frameworks to inform our decisions. At times, we might also use multiple mindsets to weigh our options. Mindsets are not singular.
- **Why mindsets matter:**
They're key to understanding the latent values of our behavioural process, and the tension behind the decisions we make every day. Mindsets don't replace demographic insights, but are an additional dimension that enriches them.
- **What mindsets look like in practice:**
We can use mindsets to examine any behaviours or decisions. For example, we worked with a leading Canadian grocer to better understand its customers. Through our methodology, we identified key mindsets that people may use during a shopping trip, ranging from the practical (focused on efficiency) to the experiential (a desire to browse and discover new products). Uncovering these mental models, or dominant ways of thinking, allows us to design ways to more effectively to meet real-world needs. By tapping into how mindsets are a baseline for decision-making, we can go beyond surface/symptomatic behaviours and probe the root of our thought processes.

Communal mindset

When it comes to vaccine hesitancy, a communal mindset means people are thinking a lot about their physical health and that of their loved ones. That's what they value most. The communal mindset wants to keep people safe. And they have concerns, which we heard in comments like:

- *"You can't trust anyone as far as this [COVID-19] goes. You have to be your own doctor or advisor, and do what is right for yourself."*
- *"I care about the side effects and ensuring I'm making the safest choice possible."*
- *"I'm all for vaccines, but I don't get something just because somebody tells me to. I do my research. I don't do it just for the sake of doing it."*

These are hardly staunch anti-vaccine misgivings. Many who have the communal mindset concede they'll likely get the vaccine eventually. They know it's needed for herd immunity. But right now, they may feel there are too many questions about side effects, differences between vaccine brands, efficacy, and coronavirus variants, among other concerns.

Individualistic mindset

The individualistic mindset orchestrates a different version of reality. People with this perspective see risks more than benefits, and they often aren't as worried about contracting the virus. They value their autonomy and might see the pressure to get vaccinated as constraining that. For some, lockdowns have caused more problems—such as the impact on the economy and people's mental health—than they've solved.

This group isn't selfish. Its members still think of others, and sometimes avidly seek to assist them—they just view such help as more of a secondary good deed rather than fundamental to their own well-being. People who possess the individualistic mindset have their own concerns, and we heard them as well:

- *"I'm not afraid of getting COVID, getting sick, dying."*
- *"What is the risk of COVID for me as a non-elderly person? The percentage of COVID patients my age that have died is low. The potential risks [of the vaccine] outweigh the rewards for me now."*
- *"I'll take it if it's necessary for travel outside Canada, but I'd rather just get COVID-19 and get natural immunity."*

People with an individualistic mindset can feel government has mishandled the pandemic from the beginning. The virus should have just been allowed to run its natural course, they might think. Others say that before vaccines, populations received natural immunity.

These two different mindsets require different approaches to reduce vaccine hesitation.

Moving the middle

Hesitancy doesn't necessarily mean skepticism about vaccines, or distrust in government; many people remain open. Vaccine education can counter the reluctance. But it must be done smartly.

With both the mindsets we identified, the key is to speak their language. That means framing the vaccine's benefits differently for each group.

For the communal-minded, appeal to their desire to protect what matters most to them. They value universal physical health, so the question to answer for them is: why is getting vaccinated urgent? The answer is that with the virus raging, they might regret not acting in a timely manner.

Moreover, vaccinating sooner means they can gather safely with the people they love and have those family celebrations again. So, another approach is to play up the impact of the vaccine on their ability to get back to those moments.

For the individualistic-minded, appeal to their desire for freedom. Being vaccinated is a ticket to being able to govern their decisions about their own lives. It will allow people to exercise their freedoms because society will be able to open up. We'll all be free again. Also, people in this group are willing to help others even if they aren't as concerned about their own physical health, so getting the vaccine to support those in greater need could be an effective message as well.

A common message to convey to both groups is that the end is in sight, and the vaccine is a way out. Whatever approaches are used to persuade each mindset, social media is a critical lever. Monitor social media channels to stay close to the dynamic nature, sources, and emerging themes of misinformation and disinformation that are spreading online. Understand the narrative and form strategic social media relationships—in many cases, the right messengers on those channels (such as influencers, celebrities, and athletes) can engage more people than official sources on established news channels. That can help to dispel doubt and promote confidence around getting vaccinated. Just remember that messages have to be vivid to break through the noise.

No one source is a paragon of all pertinent information. People still have a fair amount of trust in medical professionals as an authority, and the more local the message the better.

What won't work? Simply tossing more facts, evidence, and the science of relative risks onto the pile. That only resonates with people who are already pro-vaccination. Relying solely on logical arguments can be counterproductive, because it can make people feel they're wrong for having certain fears and may threaten beliefs that form part of their identity.

We've been inundated with information since the day a successful vaccine was declared. Information flowing from government and mainstream media has been competing with unreliable sources. Advice has also changed over time, even from the experts. Crucially, the current vaccine messaging doesn't always acknowledge what truly moves people.

We need to target hearts, not just minds. And we need to do it in a continuous, near real-time, and intelligent way. Given the rapidly changing nature of the pandemic, mass campaigns that make assumptions about the way Canadians think aren't going to cut it.

What we need to do

1. Frame the benefits of the vaccine differently for different mindsets.
2. Stay at the front line through strategic social media relationships. Sources and themes of misinformation and disinformation are dynamic—track them, grasp the narrative, and use social media channels to your advantage.
3. Emphasize urgency to encourage those with a communal mindset. For the sake of those they care about, they might regret not acting faster.
4. Emphasize freedom to encourage those with an individualistic mindset. The vaccine isn't a constraint—it's a ticket to autonomy.

Getting the (right) message out

With COVID-19, all sense of normalcy has been upended. Fault lines have emerged across every aspect of society. Messages need to be communicated in a way that rebuilds trust, gives shape to ambiguity, and addresses how we feel. Mental models and thinking styles must be understood, and messages tailored with those insights in mind.

When it comes to reducing vaccine hesitancy and increasing uptake, the qualitative insights outlined here can help move the needle. Now we just need to act on them.

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