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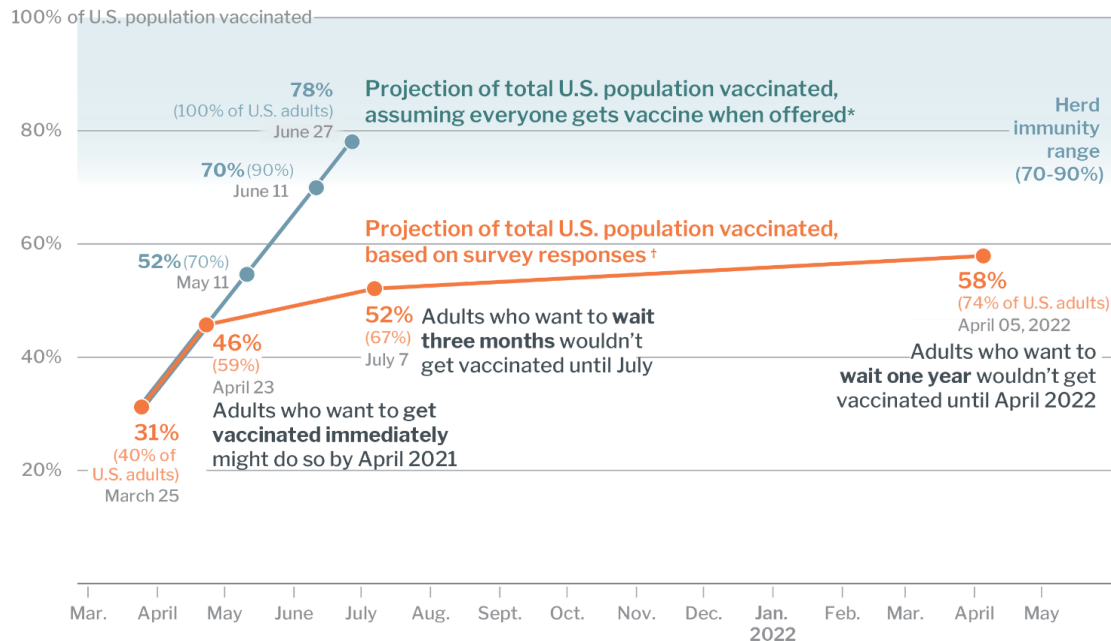
ANALYSIS: Surgo Ventures Projects U.S. COVID-19 Vaccination Rates will Plateau in Late April—Before We Reach Herd Immunity

Projections Show Vaccine Uptake Will Move Much Slower after April: Without Working Harder to Convince Vaccine Holdouts, We Will Only Achieve 58% Vaccine Coverage a Year from Now

WASHINGTON, April 8, 2021—Today Surgo Ventures released the results of its second survey of U.S. adults, which found that enthusiasm for the COVID-19 vaccine is generally high, **with 59% of the population now saying they have already been vaccinated or want to be** as soon as a vaccine is made available to them. This proportion of vaccinated and vaccine enthusiastic adults increased from 40% in Surgo’s first survey, conducted in early January¹.

However, an additional analysis Surgo conducted based on survey respondents’ preferred timelines for getting vaccinated (e.g., “as soon as it’s available,” “in three months,” “in a year,” “don’t know” and “would not get vaccinated”) and current U.S. vaccination rates suggests that **the supply-demand shift for the vaccine will happen earlier than expected—as early as the end of April—and before the nation reaches the 70-90% threshold for achieving herd immunity.**

How Vaccine Demand Could Plateau by Late April:



* Assuming vaccinations continue at current rate of 0.6% of adults per day receiving their first dose
† Calculated based on Surgo’s nationally representative survey of 1,670 adults in the United States from March 18-March 25, 2021
Source: Surgo Ventures

¹ Surgo conducted a nationally representative survey of 1,670 adults in the United States from March 18-March 25, 2021 to assess their confidence around taking the COVID vaccine. This survey was in follow-up to Surgo’s first survey of the general U.S. population on this topic, conducted December 21, 2020-January 4, 2021. Both surveys were conducted via NORC at the University of Chicago’s [AmeriSpeak panel](#).

- Surgo projects that, based on current vaccination rates, combined with respondents' willingness to get the vaccine "immediately" when it is offered, **the most vaccine-enthusiastic adults in the U.S. should receive their first dose of the COVID vaccine by the end of April.**
- After "enthusiastic" adults are vaccinated, vaccination rates are likely to plateau based on the timelines respondents to the survey provided. Therefore, **by July 2021, the projections show that we would expect only around 52% of Americans to be vaccinated—not enough to reach herd immunity by the 4th of July.**
- After July, a sizable proportion of U.S. adults (33%) will be holding out before they take the vaccine (7% wanted to wait a year before getting vaccinated, 10% were not sure when they would get vaccinated, and 16% said they would not get vaccinated); therefore, **the projections show very incremental uptake to April 2022.** And even by April 2022, the projections show only 58% of Americans would be vaccinated.
- With herd immunity currently defined as between 70-90% of the population, and considering that currently, 59% of adults are either vaccinated or want to be vaccinated right away, Surgo modeled different scenarios for achieving vaccine coverage at both ends of the immunity spectrum:
 - **In order to vaccinate at least 70% of the entire U.S. population of 328 million** (a total of 230 million people), around 90% of U.S. adults would need to be vaccinated. This means 31% of U.S. adults still need to be convinced to get vaccinated to hit the 70% threshold. To achieve vaccination of 90% of U.S. adults, we will need to convince all of the "don't know" respondents, and some of the people who currently say they won't get the vaccine.
 - **In order to vaccinate at least 90% of the entire U.S. population,** a total of 294 million people would need to be vaccinated (or the equivalent of 115% of the adult U.S. population). Even if every single U.S. adult was vaccinated, an additional 38 million children would need to be vaccinated to hit the 90% threshold. Therefore, we can't achieve this threshold without including children.
- By [some estimates](#), 26.7% of Americans have already had COVID. Those who had COVID-19, but have not yet been vaccinated will add to overall immunity rates in the US. We assumed that those who had COVID will be vaccinated at similar proportions to other Americans^{2,3}, then **we might be able to achieve an immunity rate of around 65% of Americans (immunity + vaccination) by July 2021—still not quite enough to reach herd immunity.**

"This analysis shows that despite the general vaccine enthusiasm we are seeing now in the United States, things are going to get really difficult really soon," said Dr. Sema K. Sgaier, Co-Founder and CEO of Surgo Ventures and Adjunct Assistant Professor at Harvard T.H. Chan School of Public Health. "Without significant investment in addressing people's barriers *and* making vaccines available to those below 18, reaching herd immunity will be a real challenge."

² If 40% of Americans have been vaccinated, then we assume that 40% of the 26.7% Americans who previously had COVID will also be vaccinated. This leaves 60% of Americans who had COVID-19, but did not get vaccinated. This group will add to overall US immunity

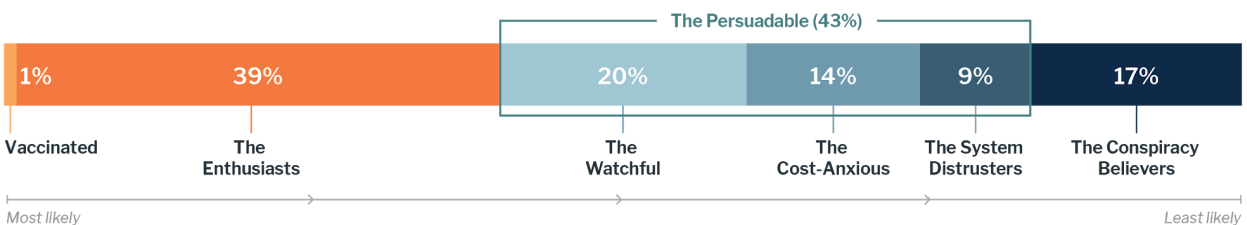
³ A [recent poll](#) from Kaiser Family Foundation found that only 4% of those planning not to get vaccinated said it was because they had already had COVID)

How a Precision Approach Can Help Close the Gap

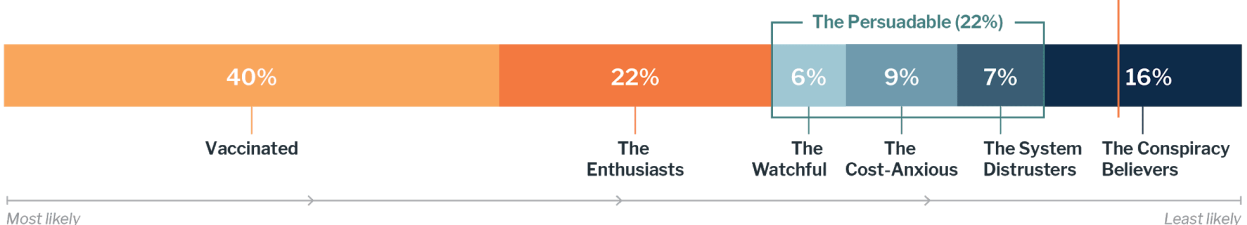
To help close the projected vaccine coverage gap, Surgo re-emphasized its commitment to a psychobehavioral targeting approach, as targeting based on the barriers that truly drive someone's intention to get vaccinated helps ensure a more precise approach.

Surgo [previously segmented the U.S. population](#) into five psychobehavioral segments according to the barriers they perceive to getting vaccinated. They used the March survey to find out if and how the composition of those segments had shifted. And indeed they had. Of the five segments identified (The 'Enthusiasts', The 'Watchful,' The 'Cost-Anxious,' The 'System Distrusters,' and The 'Conspiracy Believers'), **Surgo saw the greatest movement among the Watchful (decreasing from 20% to 6%), and the Cost-Anxious (decreasing from 14% to 9%).** The **System Distrusters (8% to 7%)** and the **Conspiracy Believers (18% to 16%)** were largely unchanged, remaining stubbornly opposed to the vaccine. **The proportion of Enthusiasts also shrank from 39% to 22%**, likely because many from this group have since been vaccinated.

Surgo Ventures' first U.S. survey (conducted 12/21/20 - 1/4/21)



Second survey (conducted 3/18/21 - 3/25/21)



In order to reach a minimum threshold of 70% vaccinated, Dr. Sgaier noted that efforts must now include not only prioritizing “the Persuadable” and focusing on dismantling the real or perceived barriers that stand in their way, but also convincing at least some proportion of the Conspiracy Believers: “Make no mistake, this segment of the population will be far more difficult to convince—after all, there’s a reason we didn’t deem them ‘Persuadable’ to begin with. But we can’t get around the math.”

Surgo’s proposed solutions include:

- **For The “Watchful”**
 - Appointment availability (19%) and time (14%) are the main barriers to vaccination for this group. To get them vaccinated, we need to make the vaccination process easy and efficient, while continuing to emphasize that others in their community are getting vaccinated and clearly communicating that possible side effects are not out unusual and fairly common reactions

- **For The “Cost-Anxious”**
 - For this segment, we need to solve for cost and time barriers: 21% of them report being concerned there will be no available appointments, 18% report concern about no time to get them, 16% report they don't know how to schedule an appointment, and 14% report concerns about vaccine cost. Communications promoting vaccination should clearly and directly emphasize that the vaccine is free.

- **For The “System Distrusters”**
 - For this segment, efforts should focus on building trust by not only leveraging community messengers, but also by using vaccine promotion as an opportunity to advocate for health equity more broadly. Solutions should leverage trusted “vaccine ambassadors” in places that are frequented—like barbershops and hair salons—to hold conversations and set up vaccination clinics in popular and well-frequented community settings.

- **For The “Conspiracy Believers”**
 - To attempt to move the Conspiracy Believers, we should start by enlisting trusted figures to communicate the relative risks of vaccination compared to the benefits. Incentives such as offering paid time off to get vaccinated may also encourage this group to get vaccinated.

Read Surgo's survey methods [here](#). [Read Surgo's February report from its first national survey: “The Challenge of Our Time: Achieving High Vaccination Coverage during the COVID-19 Pandemic.”](#)

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