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Spotlight Survey Results

**Workplace COVID-19
Vaccine Policy**

March 2021



Survey Purpose

***Gauge opinions among employees
regarding attitudes toward workplace
vaccination policies and approaches***



Padilla Spotlight Methodology

Padilla's research division, SMS Research Advisors, conducted an online survey among U.S. consumers

Valid Respondent:

- Must be at least 18 years or older
- Must not work for a market research or advertising agency
- Must be employed, either full time or part time

Survey length: Approximately 17 questions

Sponsorship: Padilla was NOT identified as the study sponsor

Database: Padilla leveraged a panel partner dedicated to recruiting consumers to participate in surveys

Geography: U.S., nationwide

Weighting: Responses were weighted to U.S. Census for age, gender and ethnicity

Incentive: Panel respondents were provided compensation from the panel partner for their participation in the online community

Field Dates: January 19 – January 21, 2021

Completes: 1,026 total completes. (8.4% of survey respondents work in health care)



Key Findings

In general, organizations are not requiring their employees to receive a COVID-19 vaccine.

- This is especially true for smaller organizations, where the idea of employees getting a vaccine has more resistance.

Clarity on whether there will or won't be a policy appears to be more important than the specifics of the policy itself.

- 85% of employees whose organizations have a COVID-19 vaccination policy agree with it. 60% of employees whose organizations do not have a COVID-19 vaccination policy also agree with it.

Employees generally view receiving the vaccine as a personal decision:

- One in four employees are not planning on receiving the vaccine. This percentage is *consistent with other research* showing about 20% to 25% of U.S. citizens are not planning on receiving the vaccine.
- Generally, *employees are not interested in either positive or negative incentives* from their employer to receive the vaccine. The logic could be that immunity is the incentive, as such, there is no need for an employer-based incentive.
- *Employees that are planning to receive the vaccine want their fellow employees to receive the COVID-19 vaccine.*



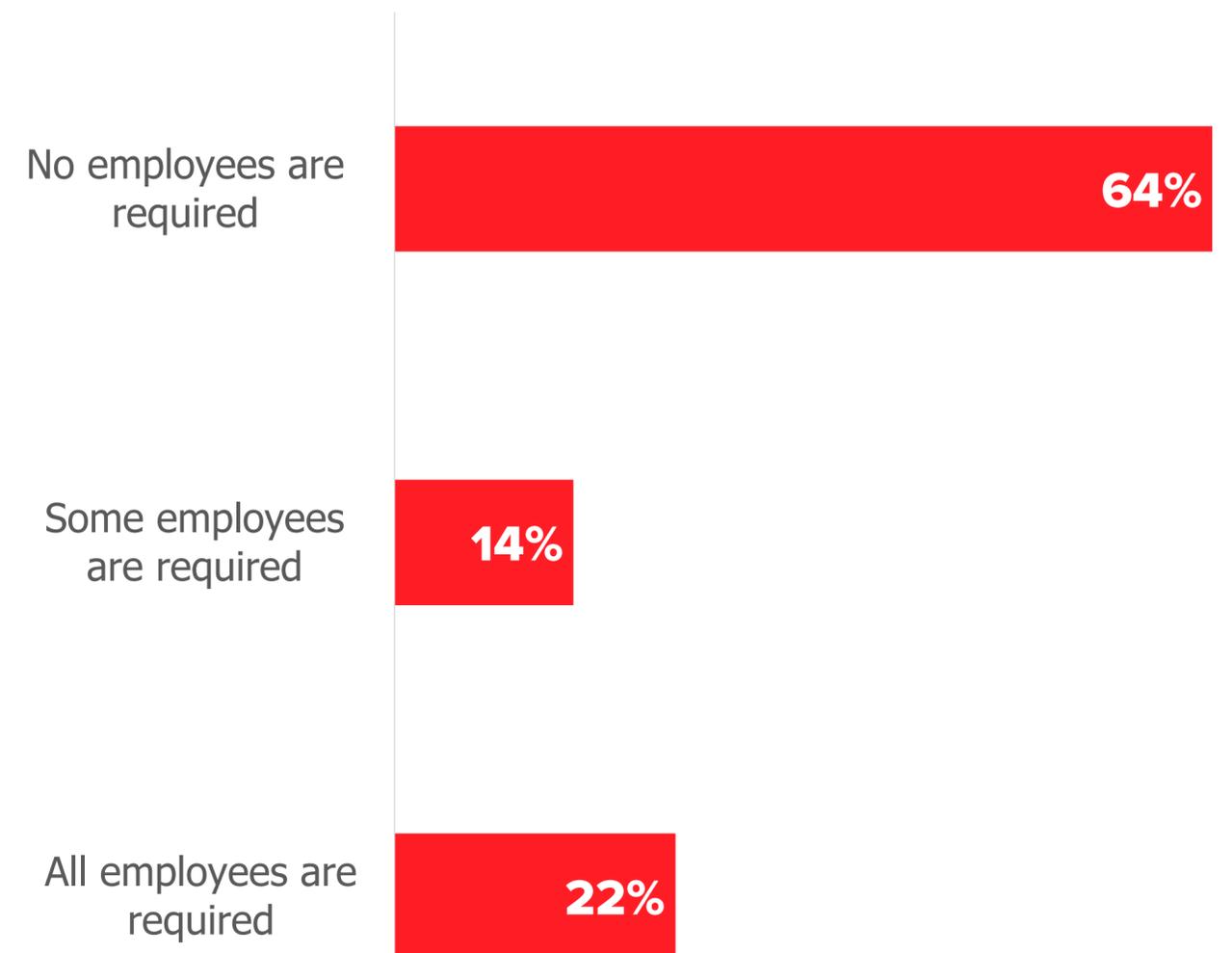
Employer-mandated COVID-19 Vaccine

Nearly two-thirds (64%) of those polled indicate *that their employers are not requiring* people get vaccinated as a condition of working.

Key Insights:

- Small (less than 50 employees) and very large (more than 5,000 employees) organizations are most likely to NOT require any employees receive the COVID-19 vaccine.
- Nonprofits are more likely than for-profits to require at least some employees to receive a COVID-19 vaccine.

Percent of Employees Required to Receive COVID-19 Vaccine





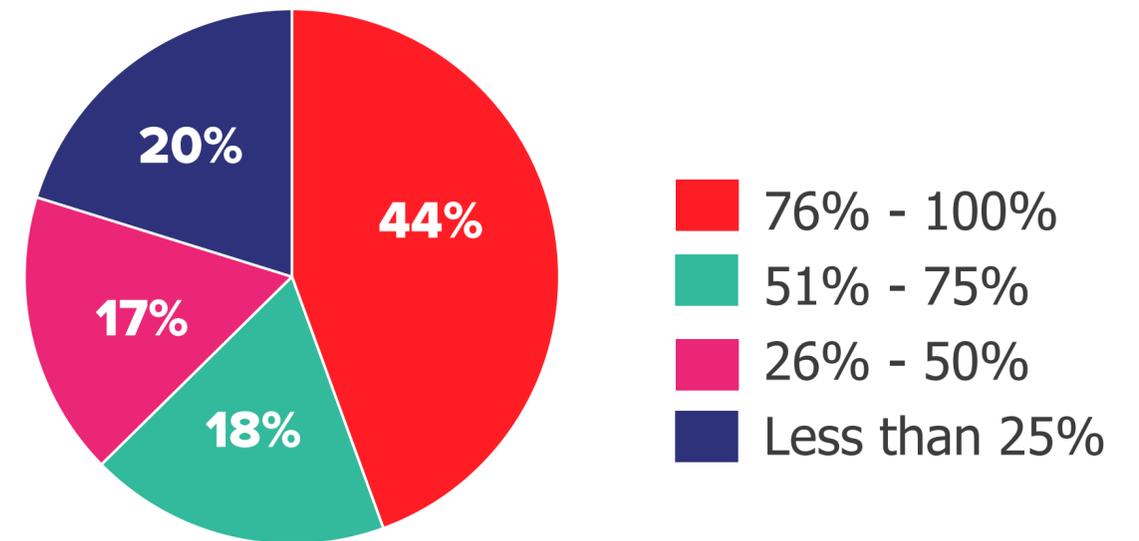
Percent Employees Vaccinated

The majority of employees will not feel as comfortable coming back to the workplace unless at least 50% of all employees are vaccinated.

Key Insights:

- Employees working for organizations with 1,000 or fewer employees want 75% or more employees vaccinated before they go back to the workplace (49% vs. 28%, respectively).
- 32% of employees with 50 or fewer employees are willing to go back to the workplace with 25% or fewer vaccinated.

Percent Workforce Vaccinated
(Among employees who received or plan to receive a COVID-19 vaccine)





Intent to Receive

The majority of employees plan to get the COVID-19 vaccine or have already received it.

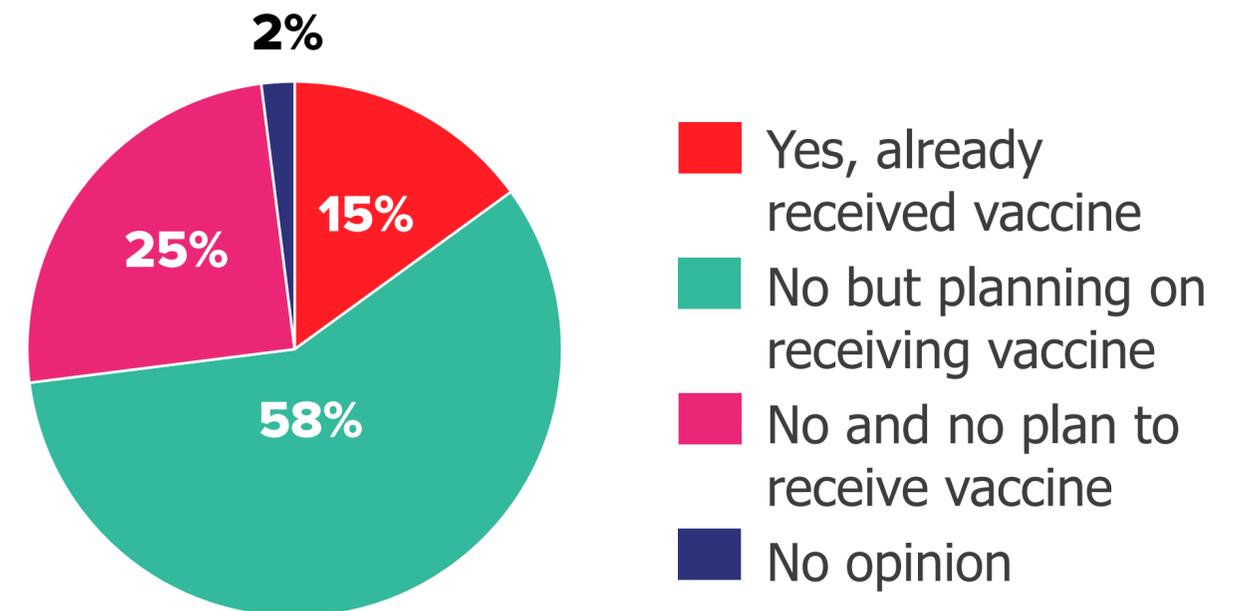
Among employees who are vaccinated, 54% work in health care.

Only one in four employees do not plan on receiving the COVID-19 vaccine.

Key Insights:

- Employees working for organizations with more than 100 employees are more likely to have already received the COVID-19 vaccine than those employees working for organizations with fewer than 10 employees (19% vs 5%, respectively).
- Organizations with fewer than 50 employees are twice as likely to not get the vaccine (31% vs 15% for all others).

Status of Receiving COVID-19 Vaccine





Others Receiving Vaccine

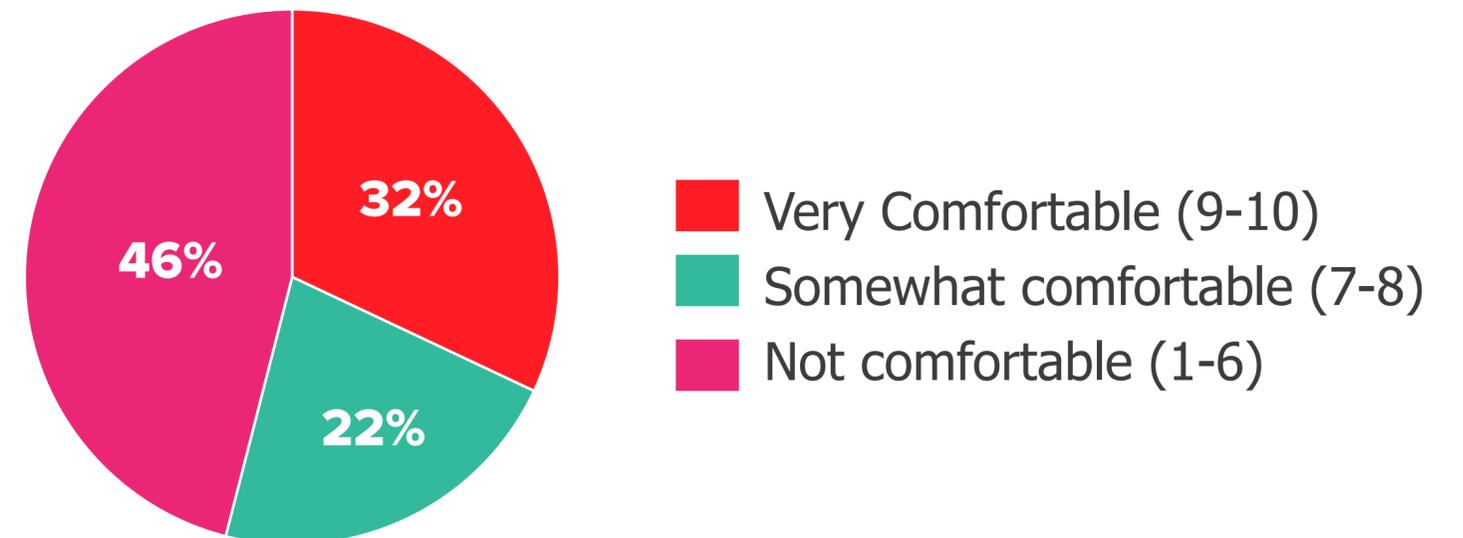
A slight minority of employees are not comfortable working in the same office as an employee who did not receive the vaccine (46%).

Key Insights:

- Employees working for organizations with 10 or fewer employees are less likely to be comfortable working alongside employees who are not vaccinated (14% vs 32%, respectively).
- Employees working for organizations earning more than \$1MM are more likely to be comfortable with non-COVID-19 vaccinated employees (41% vs 14%, respectively).

Comfort Level with Other Employees Not Receiving Vaccine

(Among employees who received or plan to receive a COVID-19 vaccine)





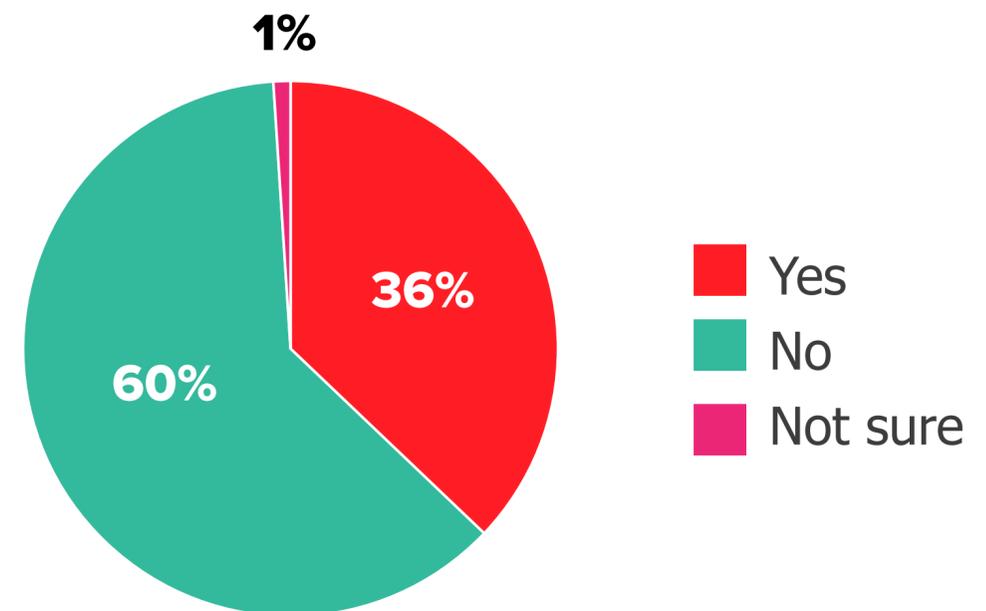
Policy Considerations

Three in five employees believe that organizations currently without a COVID-19 vaccine policy, should create one.

Key Insights:

- Among organizations with more than 5,000 employees, one-half (52%) want their organizations to create a COVID-19 vaccine policy.
- Among organizations with 10 or fewer employees, 72% agree that their organization should not have COVID-19 vaccine policy.

Should Organization Create a COVID-19 Vaccine Policy
(Among employees whose organizations do not have a COVID-19 vaccine policy)





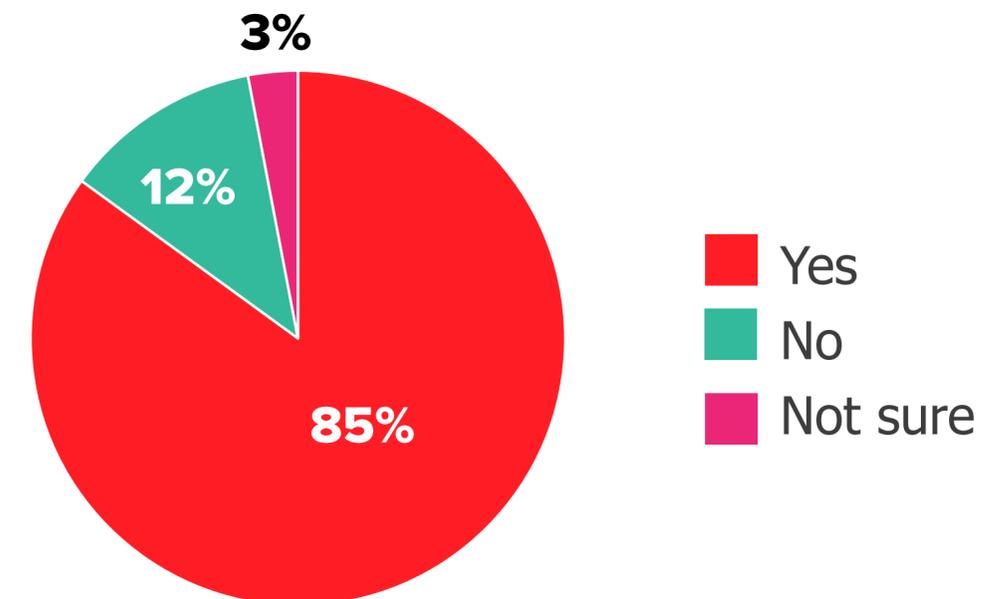
Policy Considerations (cont.)

The vast majority of employees from organizations that have a COVID-19 vaccine policy believe their organization should have one.

Key Insights:

- Among organizations with 100 and 500 employees, one-third (35%) disagree with their organizations' COVID-19 vaccine policy.

Should Organization Have a COVID-19 Vaccine Policy
(Among employees whose organizations have a COVID-19 vaccine policy)





Opinions

The reasons for employees supporting a given organization's policy centers around the idea of balancing the needs of their community against their personal freedoms.

The most common opposition for a mandatory vaccine policy comes from two camps:

- Some want to receive a vaccine, but do not think their work should require it.
- Some oppose the vaccine altogether and, as such, do not want their employer to require it.

Q5. How much do you agree with each of the following statements?

Open-Ended Responses

Pro-Work Vaccine

I think that vaccinations should be required for certain types of jobs – the ones that come in contact with people on a daily basis.

Great. It was mandatory for all workers and employees to get the vaccine especially as they are always in the office or workplace.

I think it's a great idea for our business to offer vaccines and encourage employees.

I think everyone should get it because if they don't, we will be in this situation for a very long time.

I think vaccinations should be mandatory for any job that requires human-to-human interaction.

I believe that if you work in a place that has more than one hundred people, everyone should have a vaccine.

Anti-Work Vaccine

I think it should be a personal opinion, and no workplace should be allowed to enforce injecting your body. What happened to my body, my choice?

The vaccinations don't work and have not been tested enough. Requiring people to take the vaccine is unconstitutional.

I appreciate that we are tier 2, since we are state employees that go to people's homes, but I still don't trust the COVID-19 vaccine so I won't get it.

I do not believe in the COVID-19 vaccinations. I believe they will kill a person, so I don't believe in them being required by my workplace.

I'm not opposed to the vaccine, and will likely get it one day. No one should be forced to get a vaccine, however, especially one that is new and different in a lot of ways. People shouldn't be shut out of society and earning a living because they won't get a vaccine.



Incentives

The vast majority of workers are not interested in their organizations offering incentives or restricting office access to receive the COVID-19 vaccine.

- Only one in three employees indicate an interest in their employers offering an incentive.

Key Insights

- Organizations with less than 50 employees **strongly disagree** with offering any incentive or restriction to the office location.
- Organizations with more than 5,000 employees **strongly agree** with offering incentives or restriction to the office location.

Attributes (% rated "6" or "7")

All
Employees

If an employee receives the COVID-19 vaccination, they should receive some type of incentive.

32%



Incentives (cont.)

A third of employees surveyed had strong opinions around the need for all employees to be vaccinated.

Key Insights

- Given the strong opinions of some about the need to get vaccinated, companies will need to be prepared to coach employees through the disputes that are likely to arise. You may also need to keep close tabs on those that choose not to get the vaccination to ensure peer pressure doesn't become a problem in the workplace.

Attributes (% rated "6" or "7")

All
Employees

If an employee does not receive the COVID-19 vaccination, they are not allowed to enter the workplace.	29%
Receiving a COVID-19 vaccination must be mandatory to keep your job.	30%

Thank you!

CONTACT

Dan Reilly

dreilly@smsresearch.com

701.640.5605