

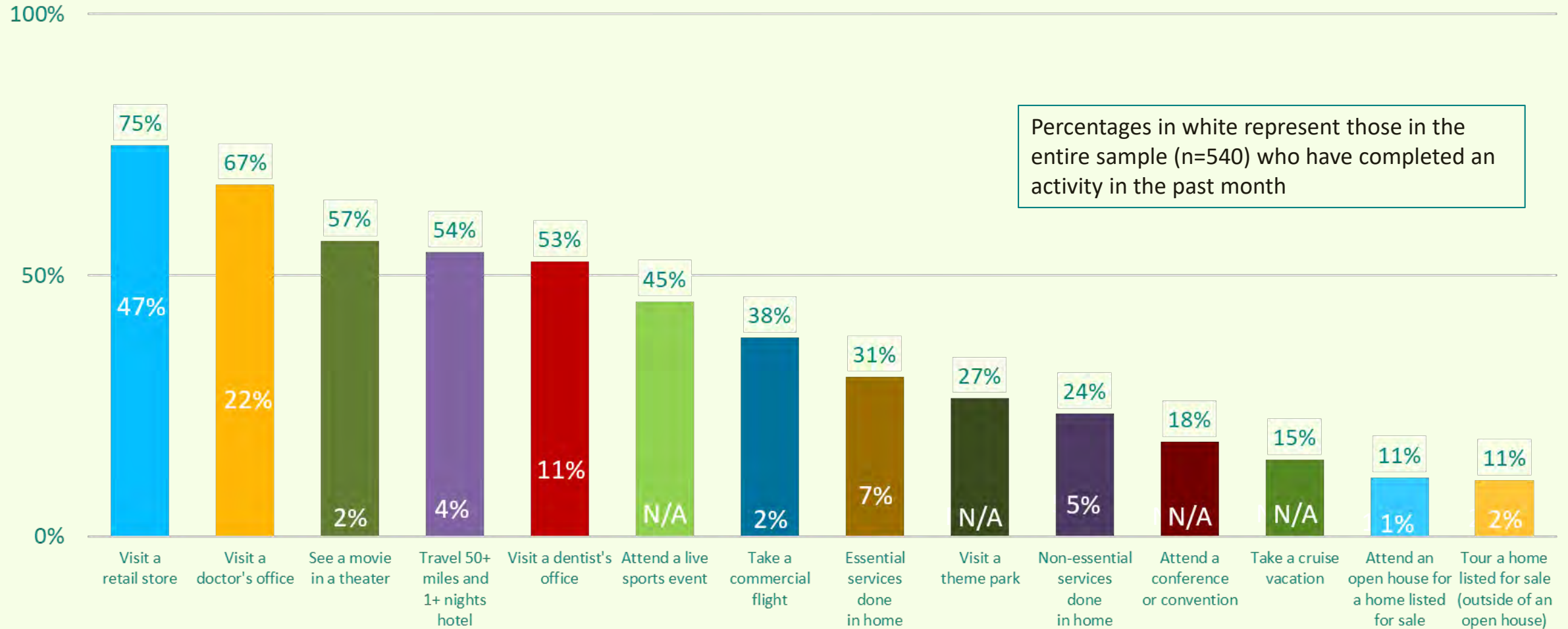
# **WAVE 9: SETTling IN FOR THE LONG HAUL**

**Public opinion insights from the August 5, 2020  
“Back-to-Normal Barometer”**

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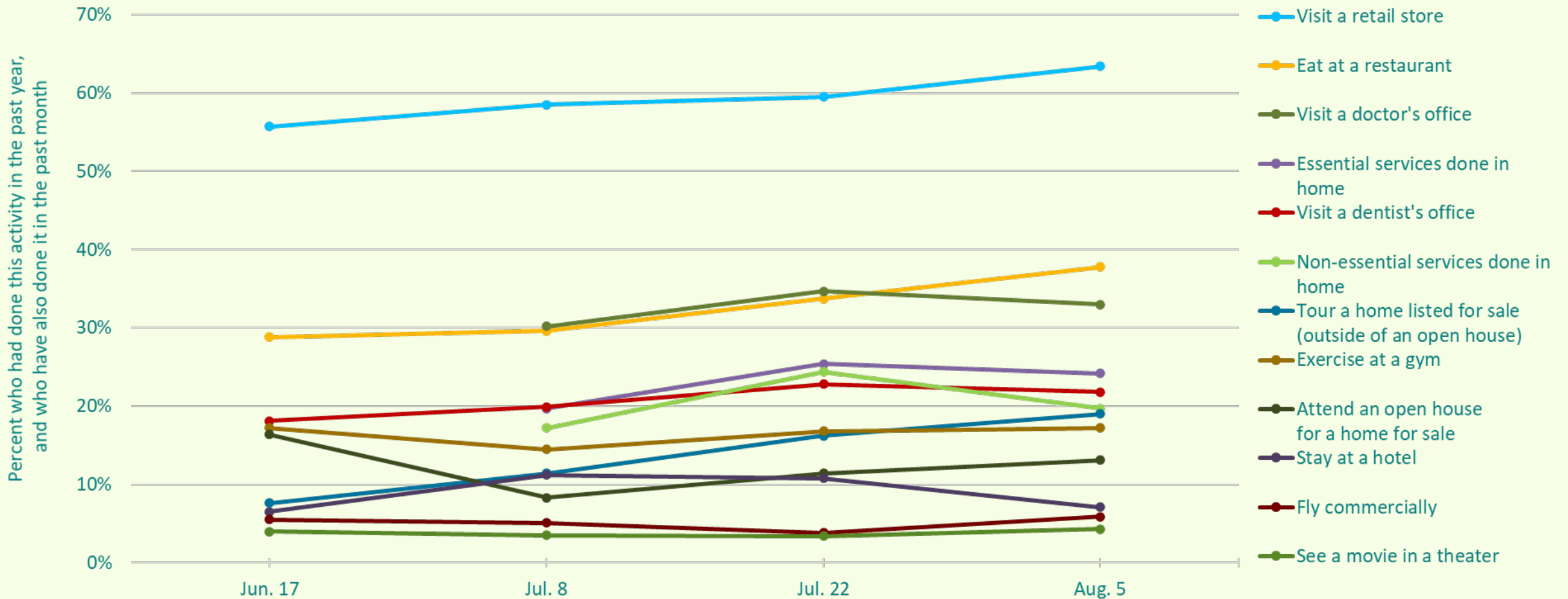
# CONTEXT: RESPONDENTS ACTIVELY ENGAGE

Percent who have participated in this activity in the past 12 months



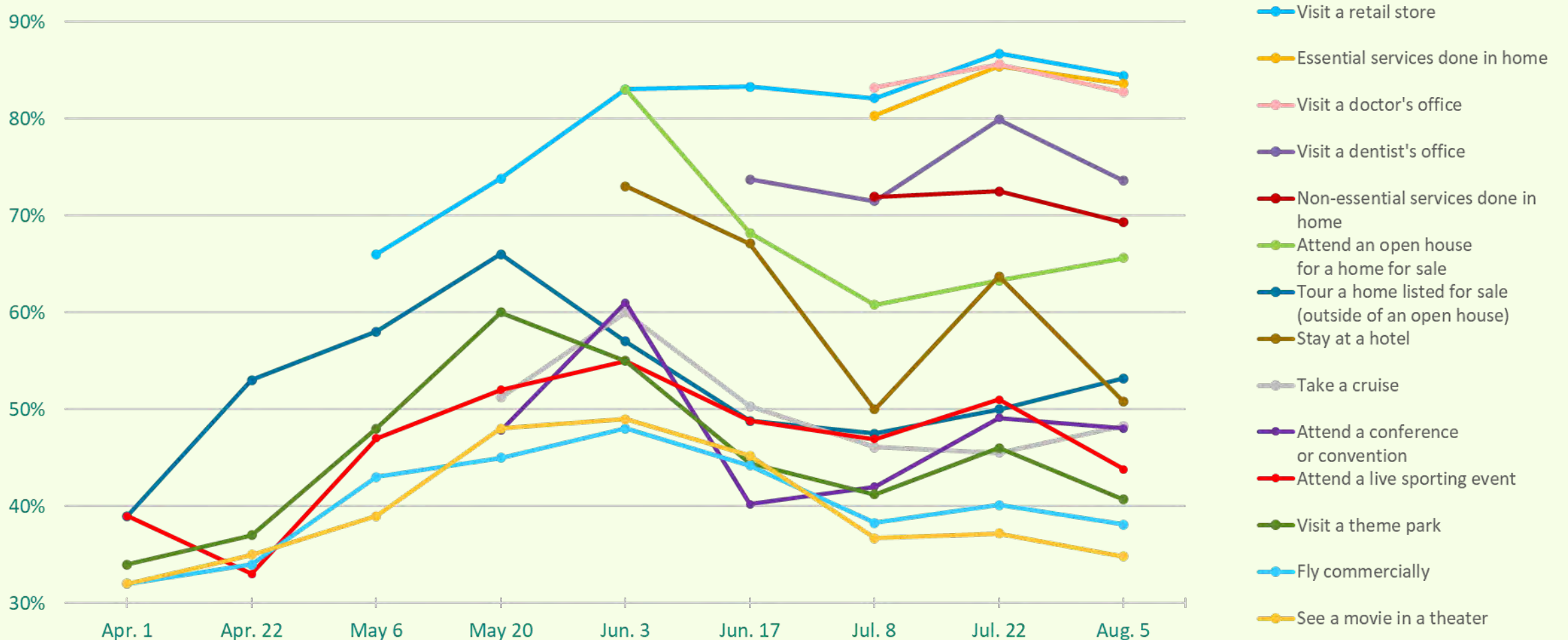
# WHAT PAST-YEAR-DOERS HAVE DONE IN THE PAST MONTH

Percent who have participated in this activity in the past month



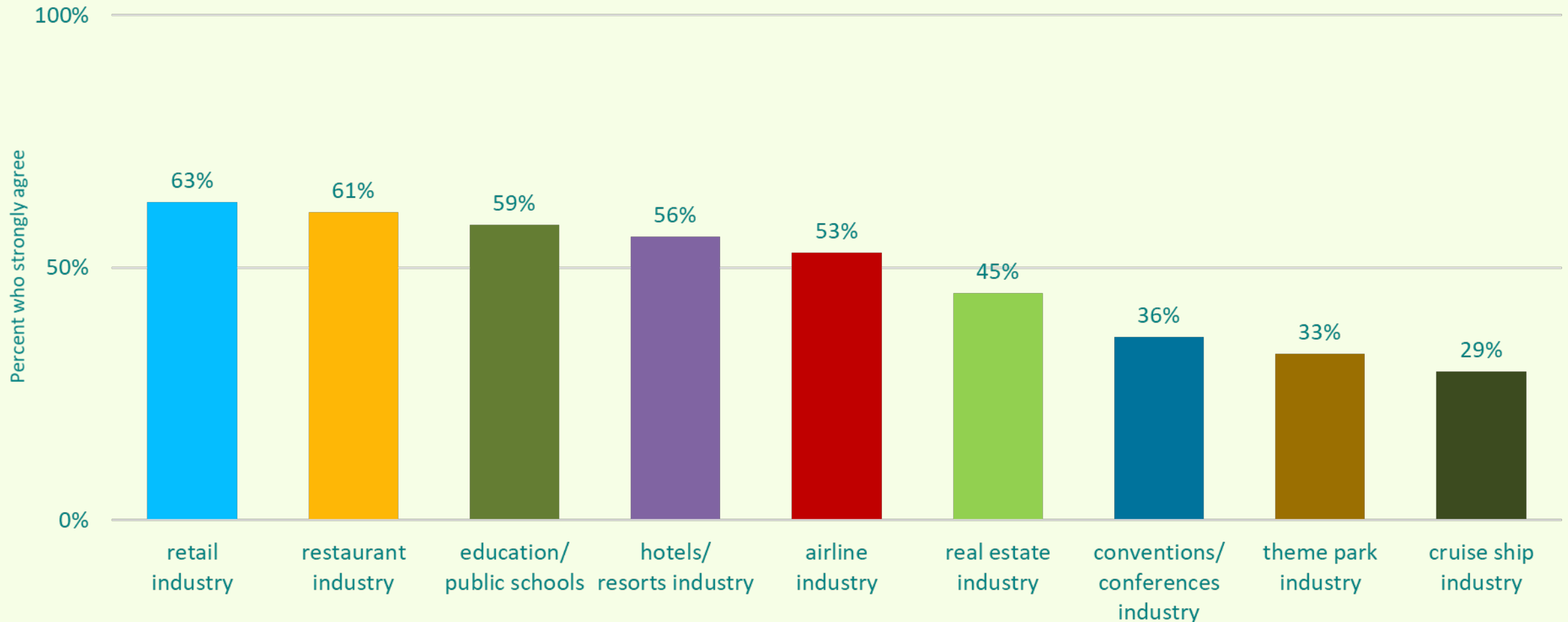
# A SIZABLE % WOULD RETURN TOMORROW

Are you currently willing to engage in the following activities, without hesitation?

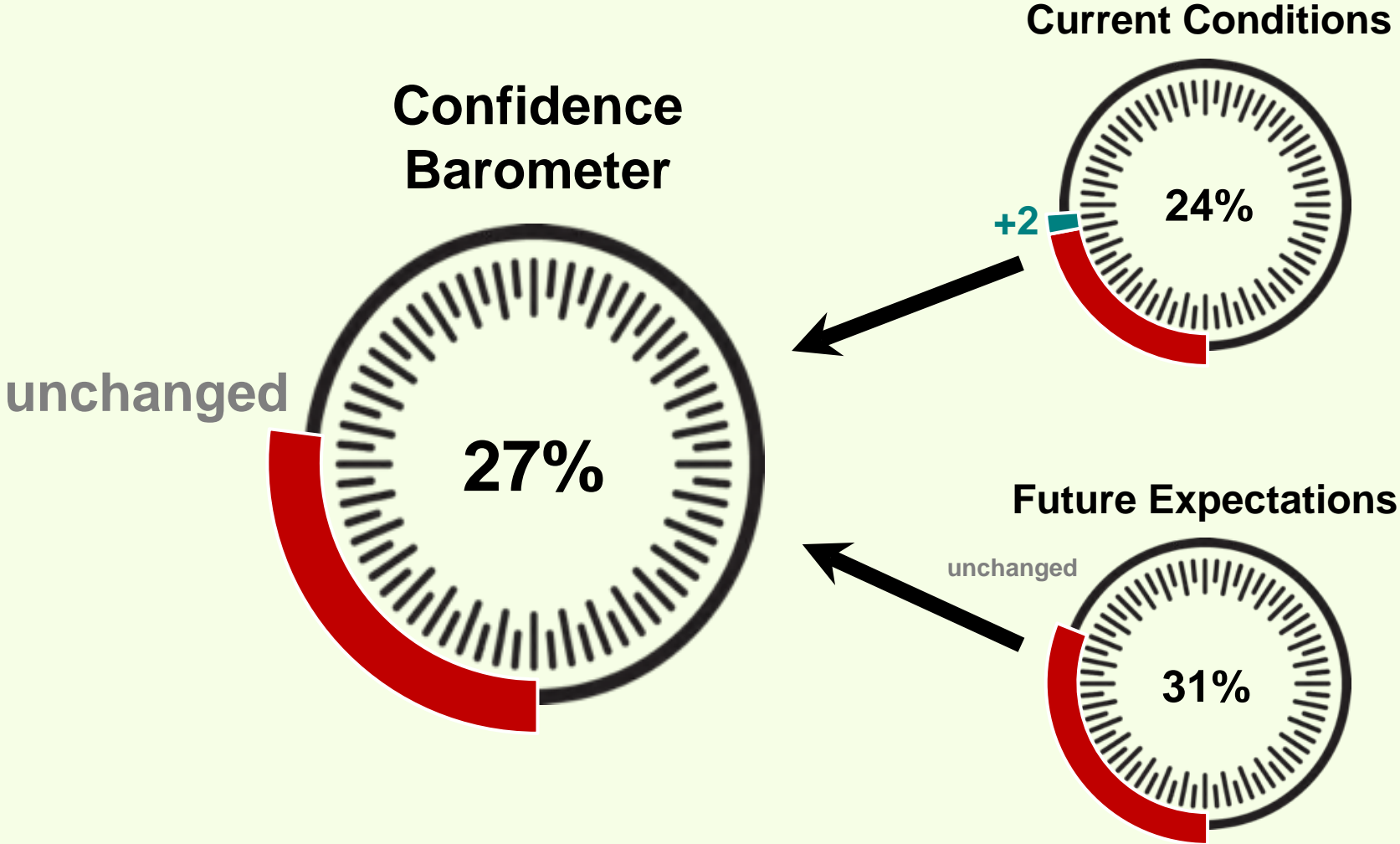


# WHICH SECTORS ARE BELLWETHERS FOR THE ECONOMY?

For the overall economy to recover, the \_\_\_\_\_ must also recover.

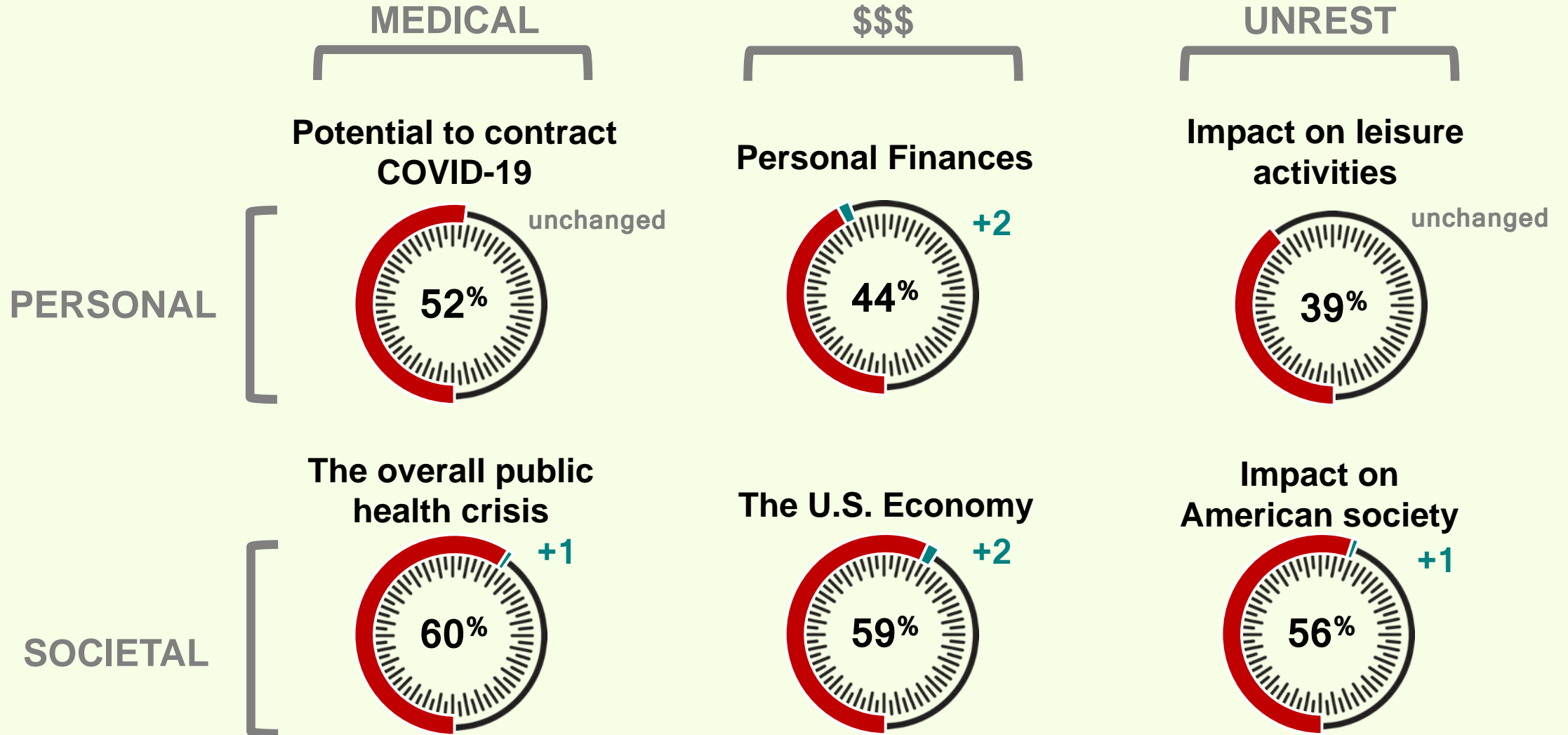


# CONFIDENCE: WHERE WE WERE IS WHERE WE ARE



Wave 8: n=576, Back to Normal Barometer – July 22, 2020  
Wave 9: n=526, Back to Normal Barometer – August 5, 2020

# SOCIETAL CONCERNS CONTINUE TO DOMINATE

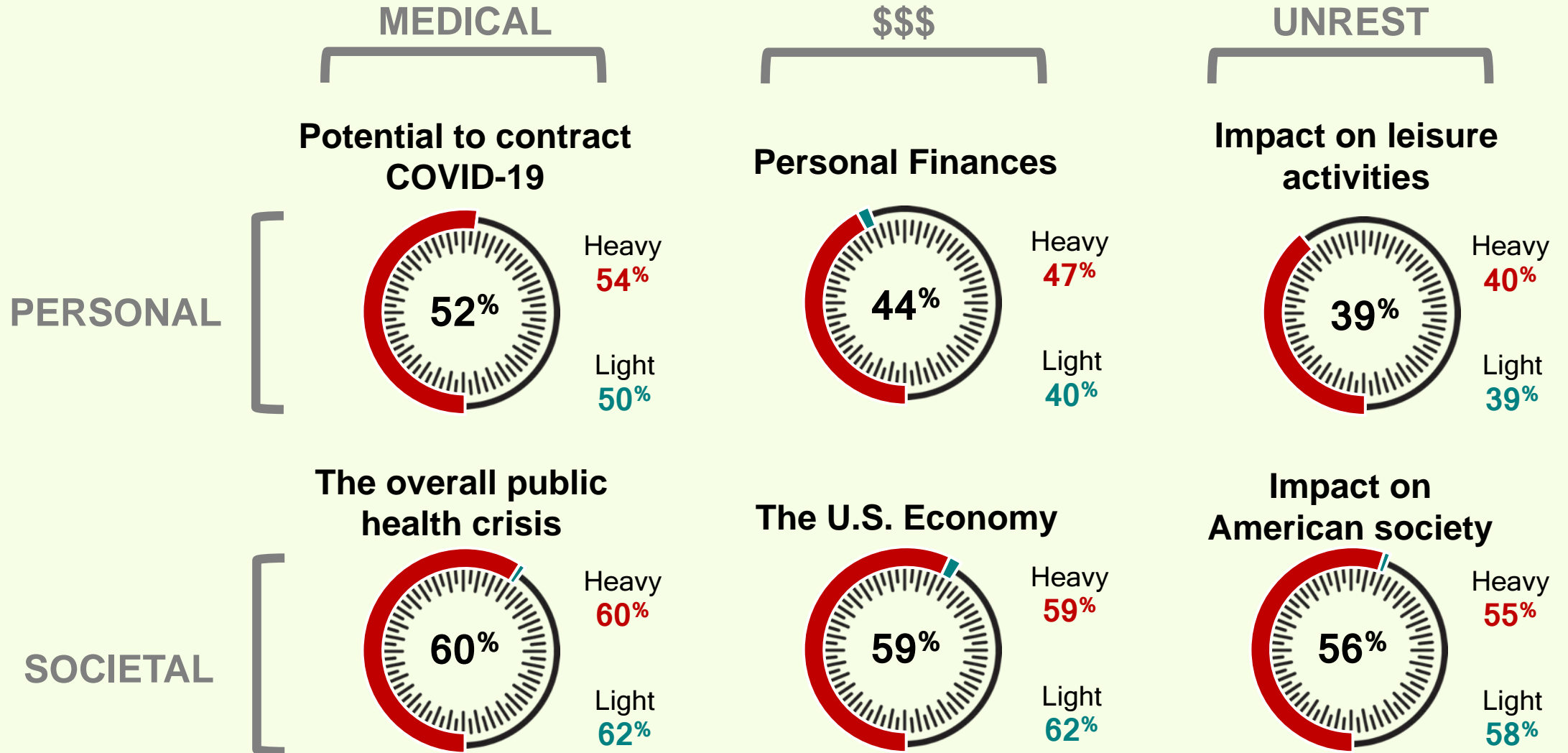


\*Percentage who said they are extremely concerned (top three box).

Wave 8: n=576, Back to Normal Barometer – July 22, 2020

Wave 9: n=526, Back to Normal Barometer – August 5, 2020

# SOCIETAL CONCERNS CONTINUE TO DOMINATE



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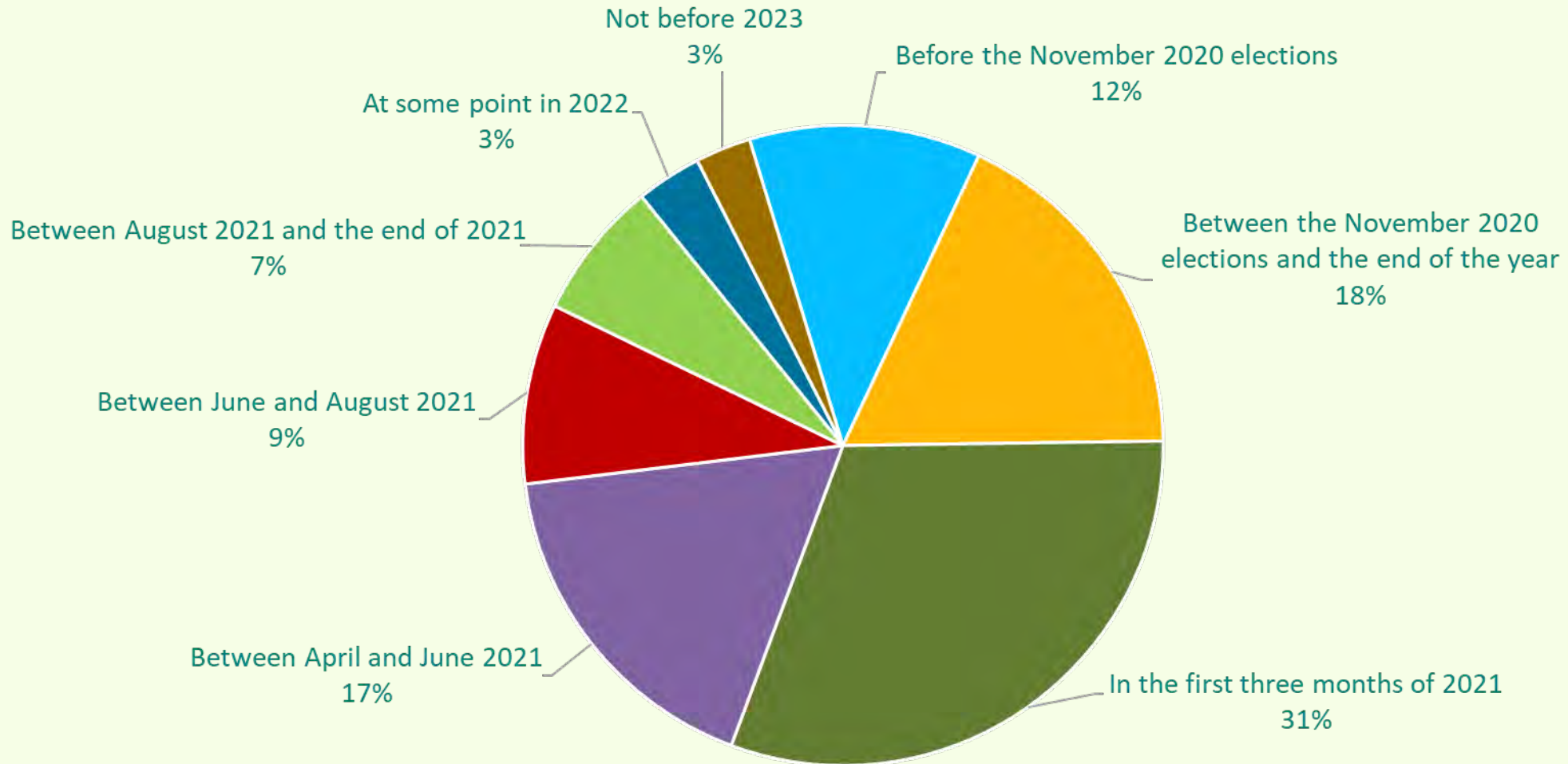
Wave 9: n=526, Back to Normal Barometer – August 5, 2020



# Vaccines

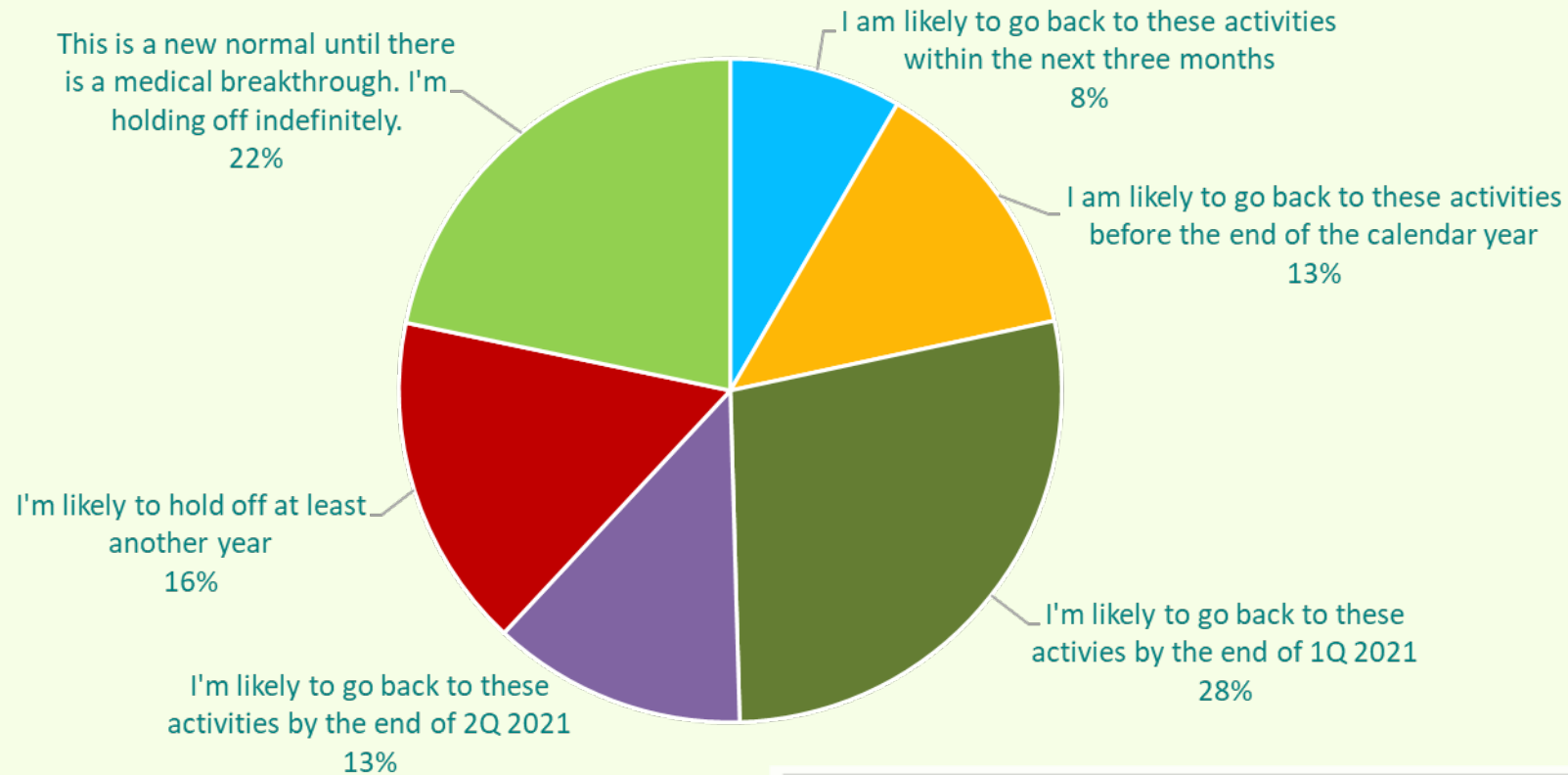
# 70% EXPECT A VACCINE IN 2021 OR LATER

When will a vaccine be widely available?



# “BREAKTHROUGH” RESPONDENTS MAY BREAK DOWN

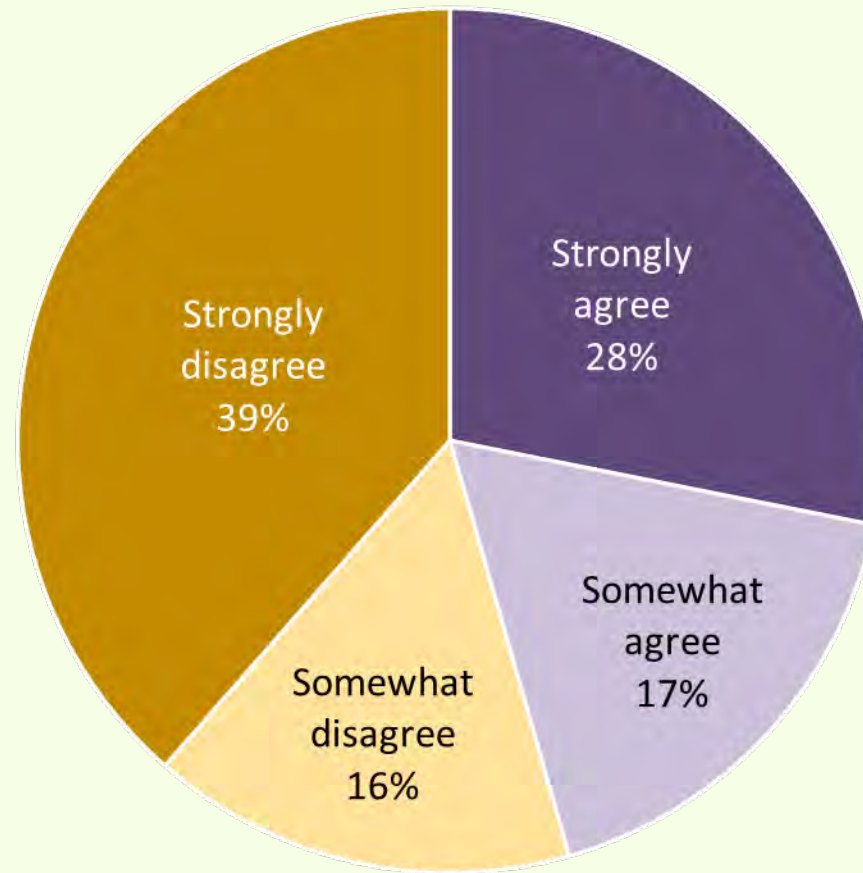
You indicated that you would not be comfortable resuming several activities unless there was an approved COVID-19 vaccine and/or a proven medical protocol to mitigate and remedy the effects of the virus. Assuming that such a medical breakthrough was years away and COVID 19 dominates our lives for the foreseeable future, how long do you feel that you will refrain from these activities absent a medical breakthrough?



# Schools & Workplaces

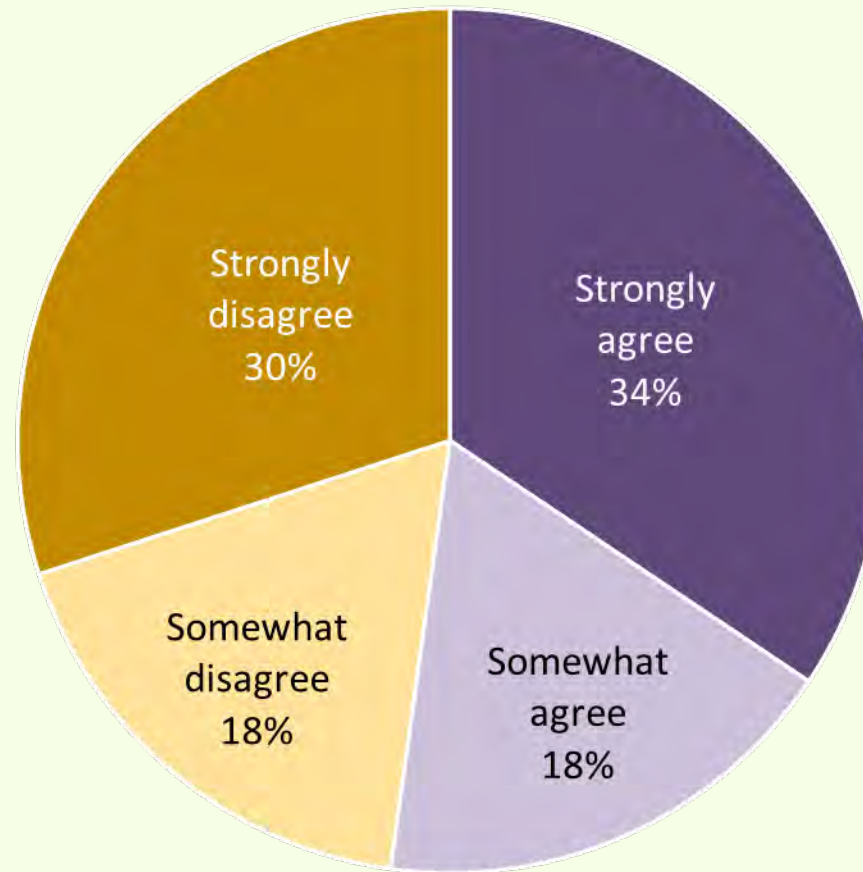
# SUPPORT LAGS FOR RE-OPENING LOCAL SCHOOLS

Schools should reopen for face-to-face instruction in my community.



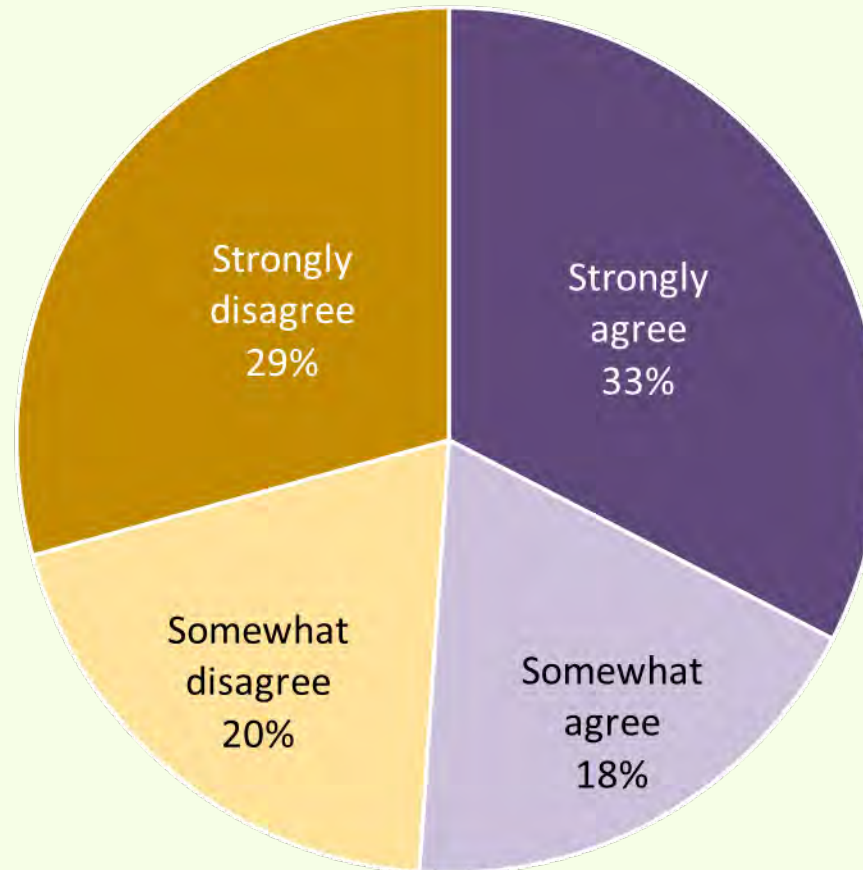
# JUST HALF SAY TEACHERS SHOULD BE REQUIRED TO RETURN

Teachers are essential workers who should be required to return to work.



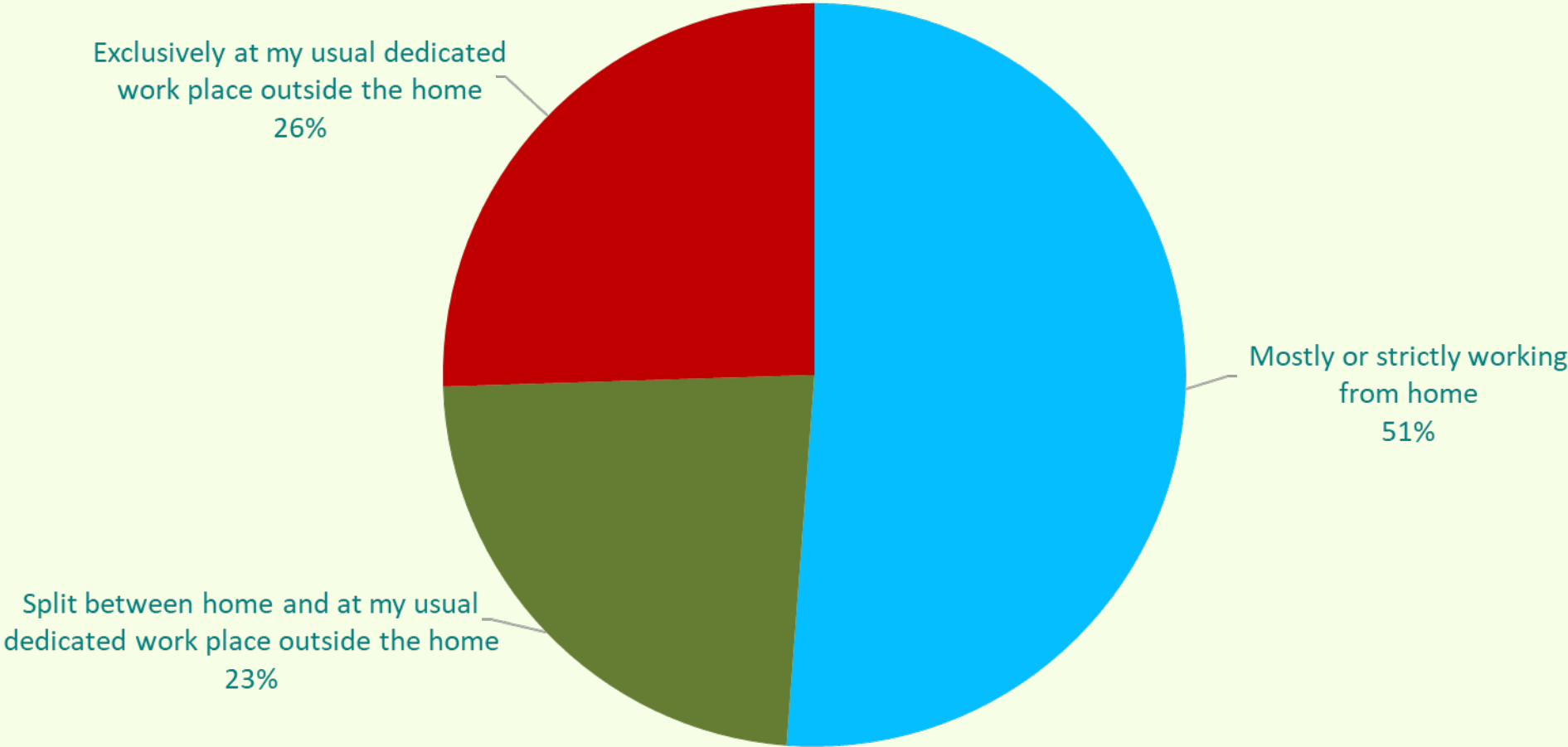
# SPORTS NOT A DRIVER OF HOW WORKPLACES SHOULD OPERATE

If professional and college sports are suspending or delaying play due to COVID-19, my workplace should also remain closed.



# MORE THAN HALF OF WORKERS ARE WORKING FROM HOME

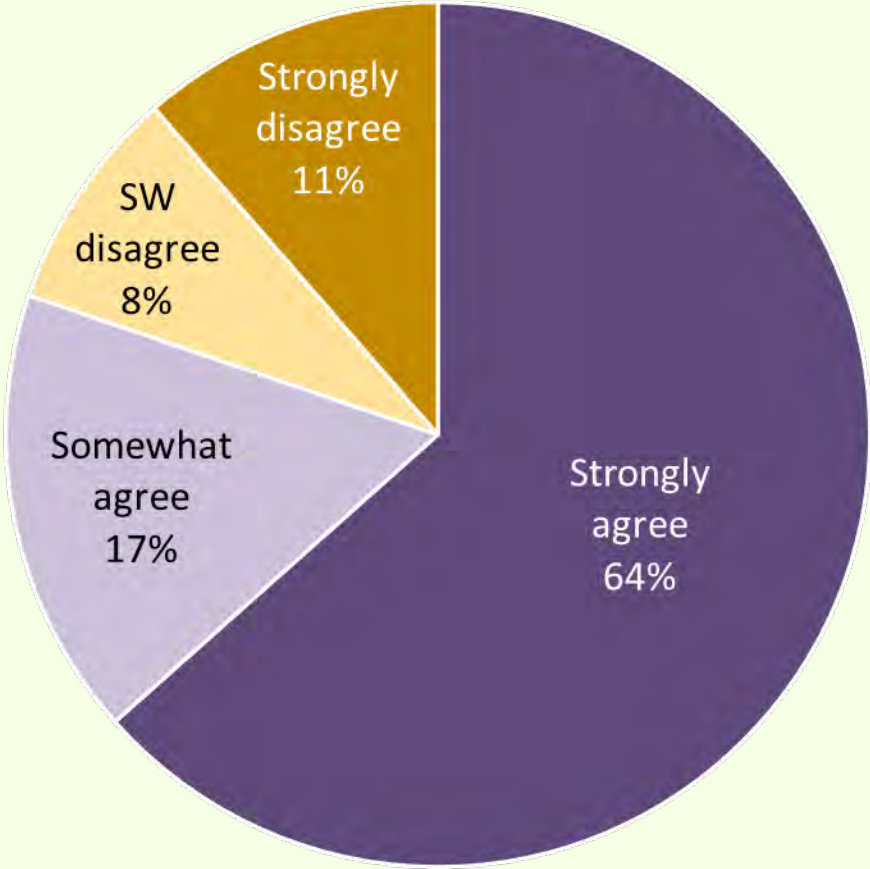
Are you presently working from home or in a dedicated workplace?





# MOST WFH-ERS ARE OPEN TO CONTINUING

Once the economy re-opens I would be open to continue working from home at least as much as I do now.



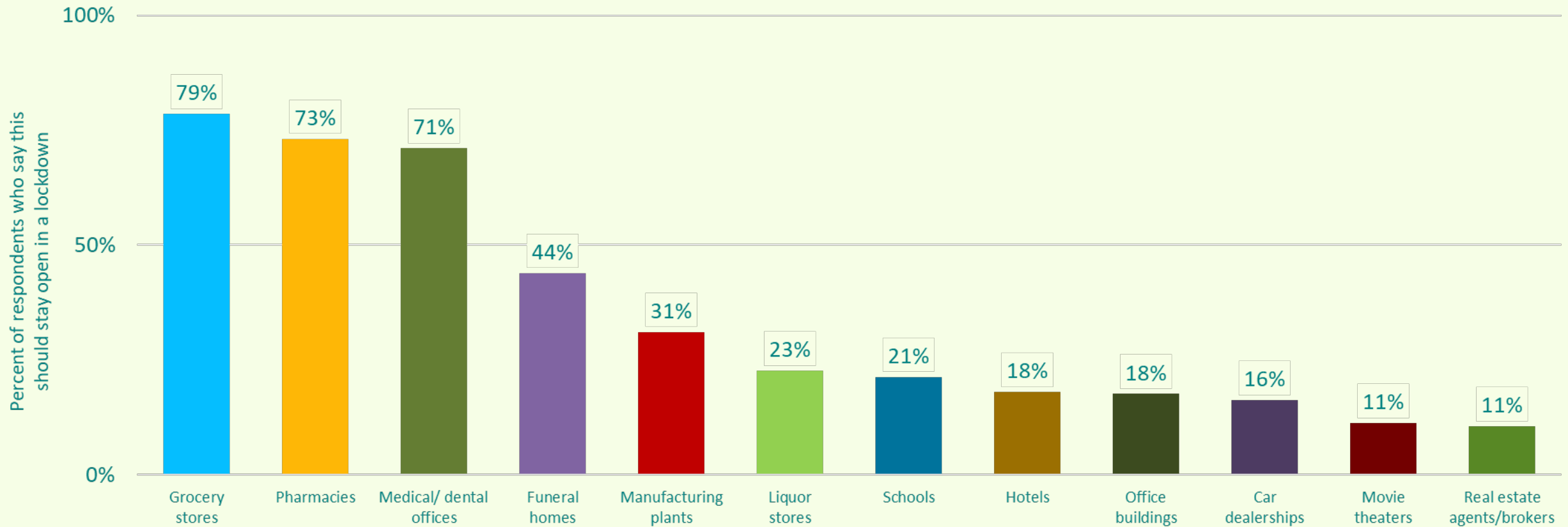
# 57% OF WFH EXPECT TO BE BACK AT OFFICE BY YEAR'S END

When do you expect to return full time to your primary place of business?

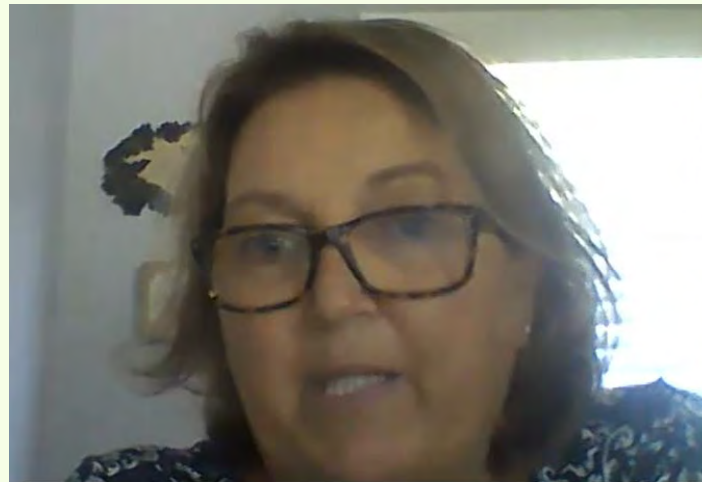
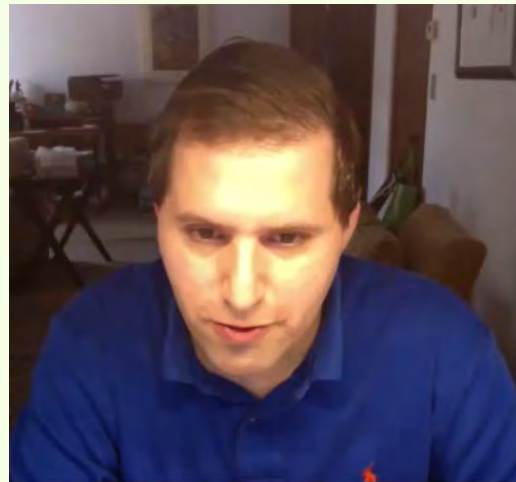
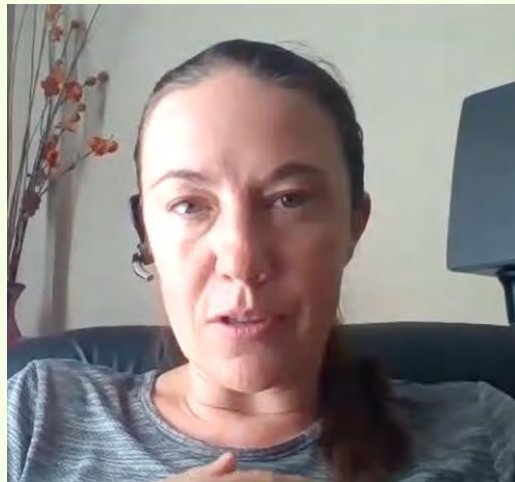
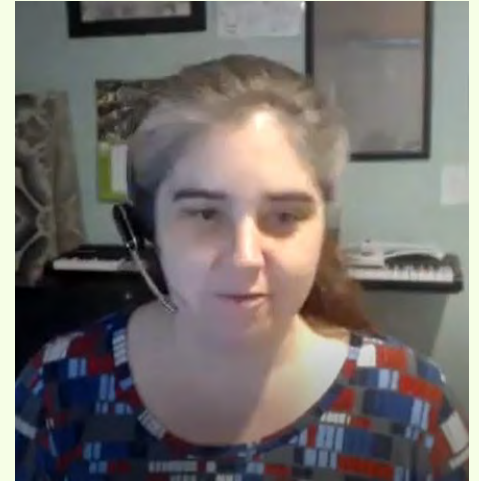


# SOME BUSINESSES ARE SEEN AS MORE ESSENTIAL THAN OTHERS

Imagine your state experiences a spike in COVID-19 cases, and the governor declares that another lockdown is needed. Which of the following establishments should be allowed to stay open because they are essential?



# IN-DEPTH INTERVIEWS: BEYOND SURVEY RESULTS



# REDEFINING THE WORK EXPERIENCE

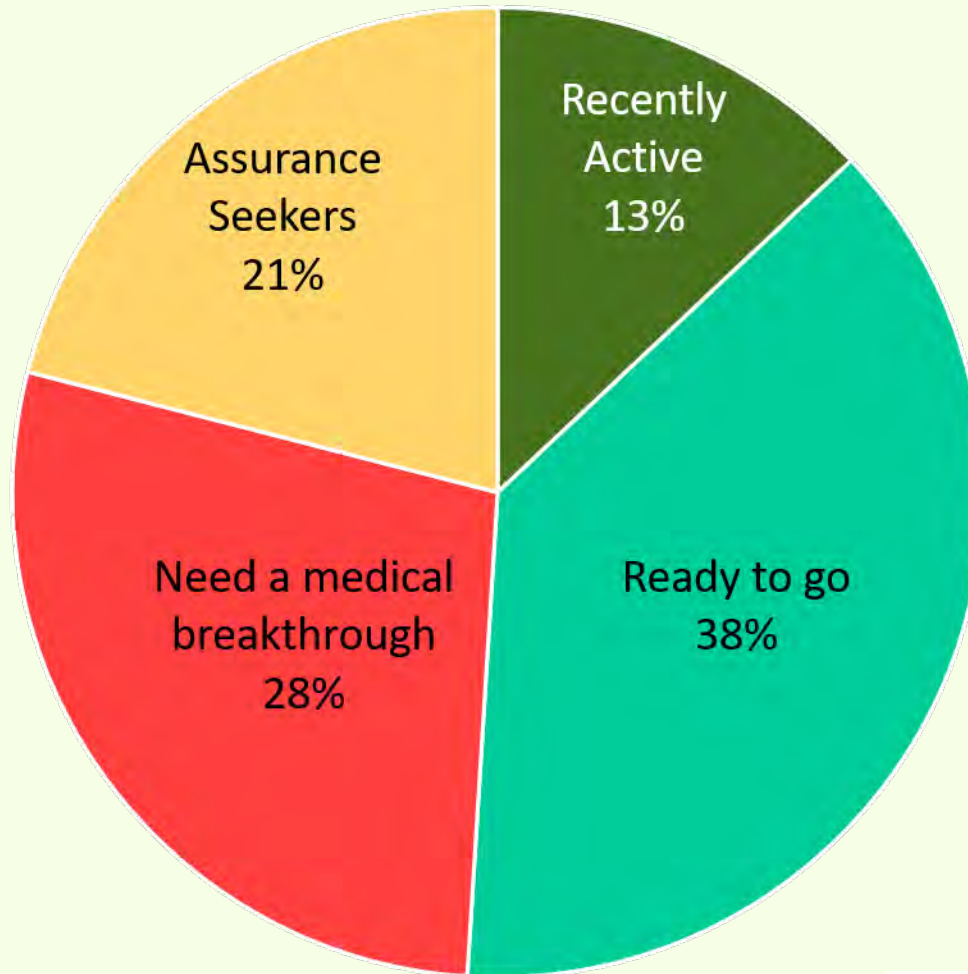
- Many WFH employees are content, and expect at least a mix of home and office offered
  - No desire to return quickly – “I don’t want to be the guinea pig”
  - Employee satisfaction - More productive, saving money
  - Company efficiency – evening response to emails, facility savings, no potential for a COVID case shut-down
  - WFH is NOT for everyone – especially younger and parents
- Big questions to consider
  - Do employees become more protective of their free time, once normal activities are resumed?
  - Do older employees plan to work longer?
  - How much workspace do companies need? What does workspace look like?

# NAR



# READY OR NOT: ATTEND AN OPEN HOUSE FOR A HOME LISTED FOR SALE

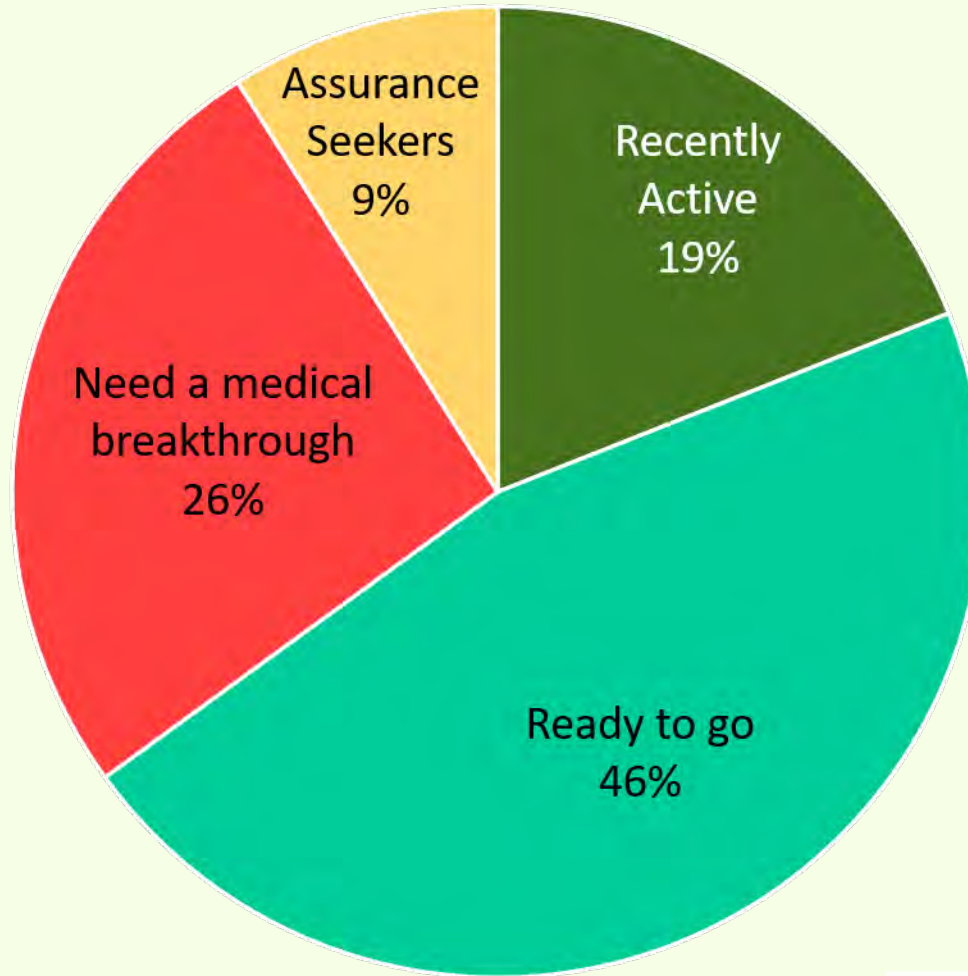
Which of the following conditions is closest to your current point of view... Attend an open house for a home listed for sale



- Recently Active
- Ready to go
- I would not be comfortable resuming this activity unless there was an approved COVID-19 vaccine and/or a proven medical protocol to mitigate and remedy the effects of the virus.
- I would be willing to resume this activity, as long as a combination of local or national medical authorities, local or national government officials, and/or the location I am visiting provided assurances it is safe to do so.

# READY OR NOT: TOUR A HOME LISTED FOR SALE (OUTSIDE OF AN OPEN HOUSE)

Which of the following conditions is closest to your current point of view... Tour a home listed for sale (outside of an open house)

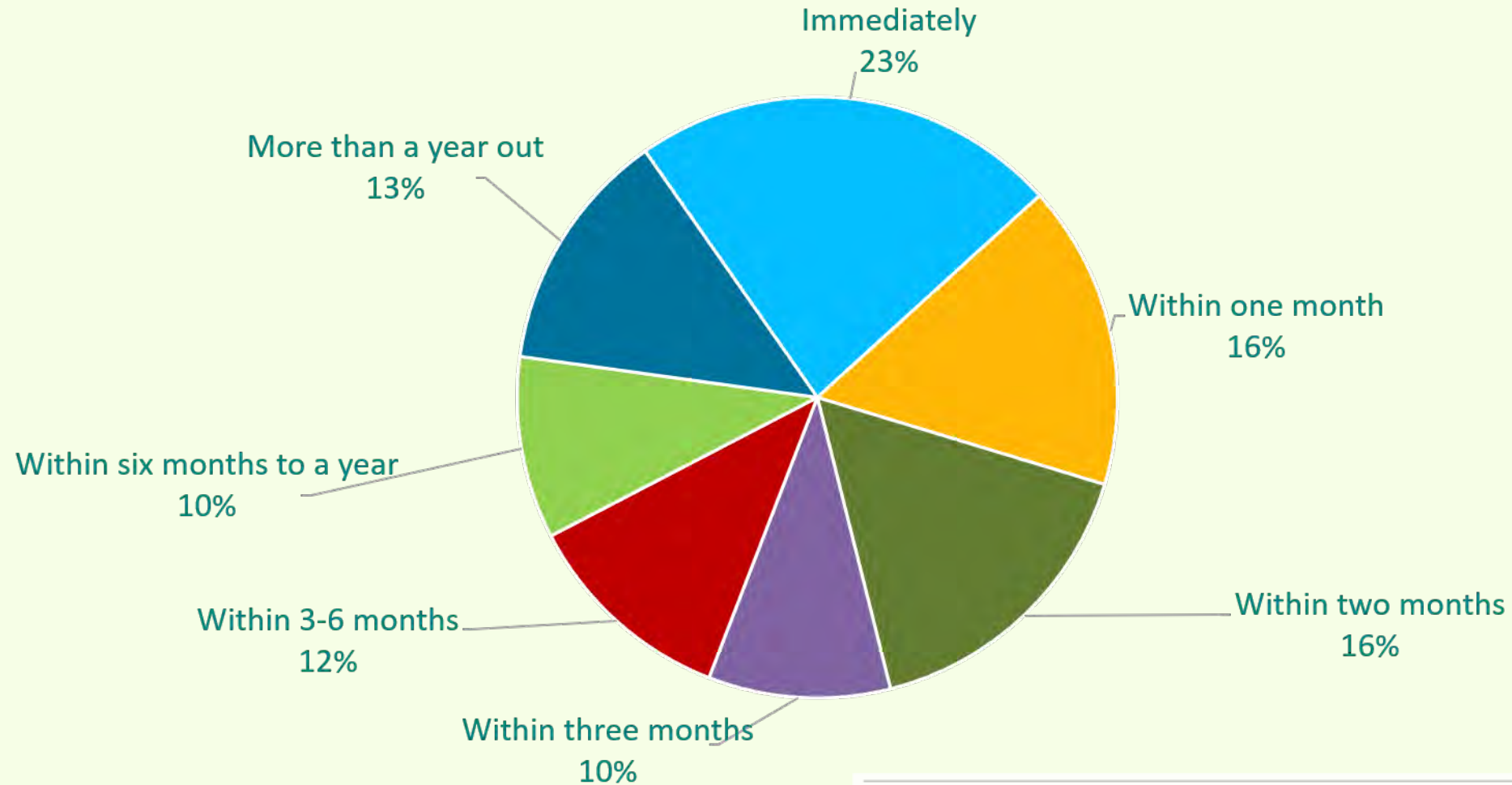


- Recently Active
- Ready to go
- I would not be comfortable resuming this activity unless there was an approved COVID-19 vaccine and/or a proven medical protocol to mitigate and remedy the effects of the virus.
- I would be willing to resume this activity, as long as a combination of local or national medical authorities, local or national government officials, and/or the location I am visiting provided assurances it is safe to do so.



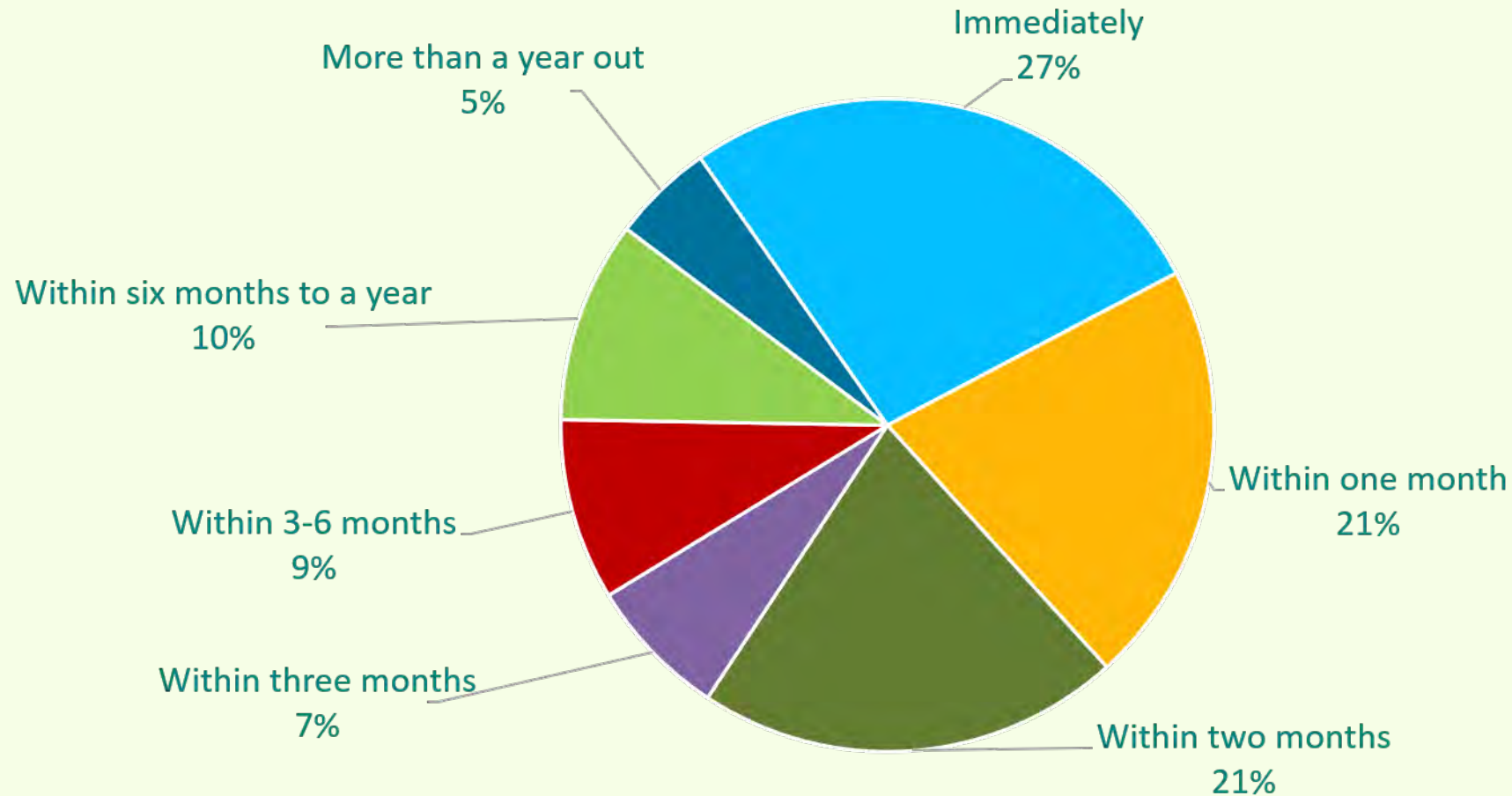
# WITH ASSURANCES, 66% RETURN IN 3 MONTHS

Assuming you had the necessary assurances that it was safe to resume normal activities, how quickly would you next..... Attend an open house for a home listed for sale?



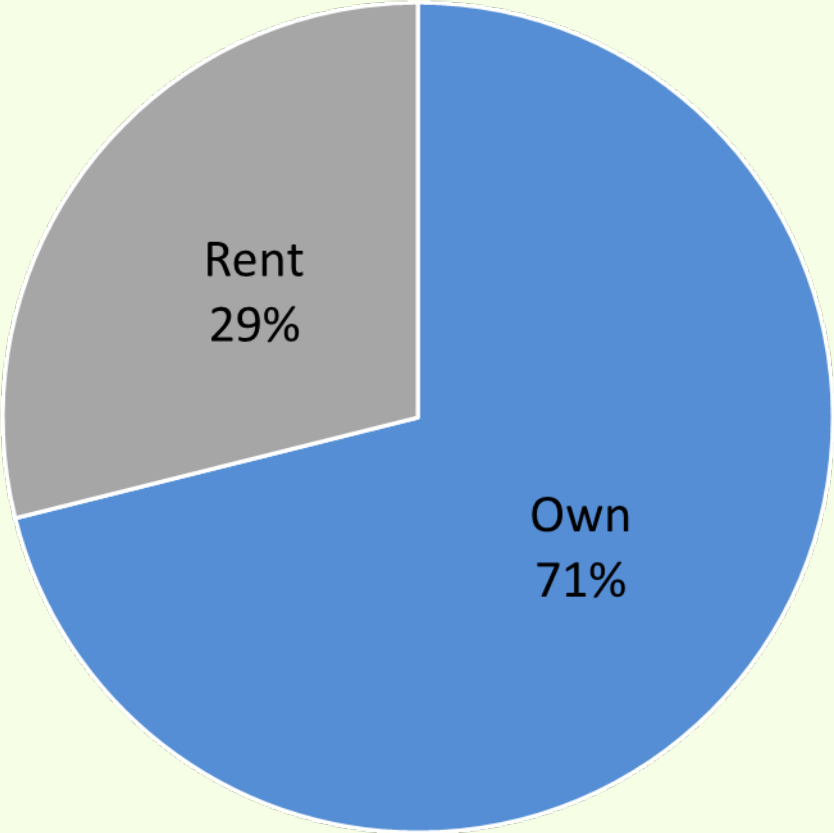
# WITH ASSURANCES, 76% RETURN IN 3 MONTHS

Assuming you had the necessary assurances that it was safe to resume normal activities, how quickly would you next..... Tour a home listed for sale (outside of an open house)?



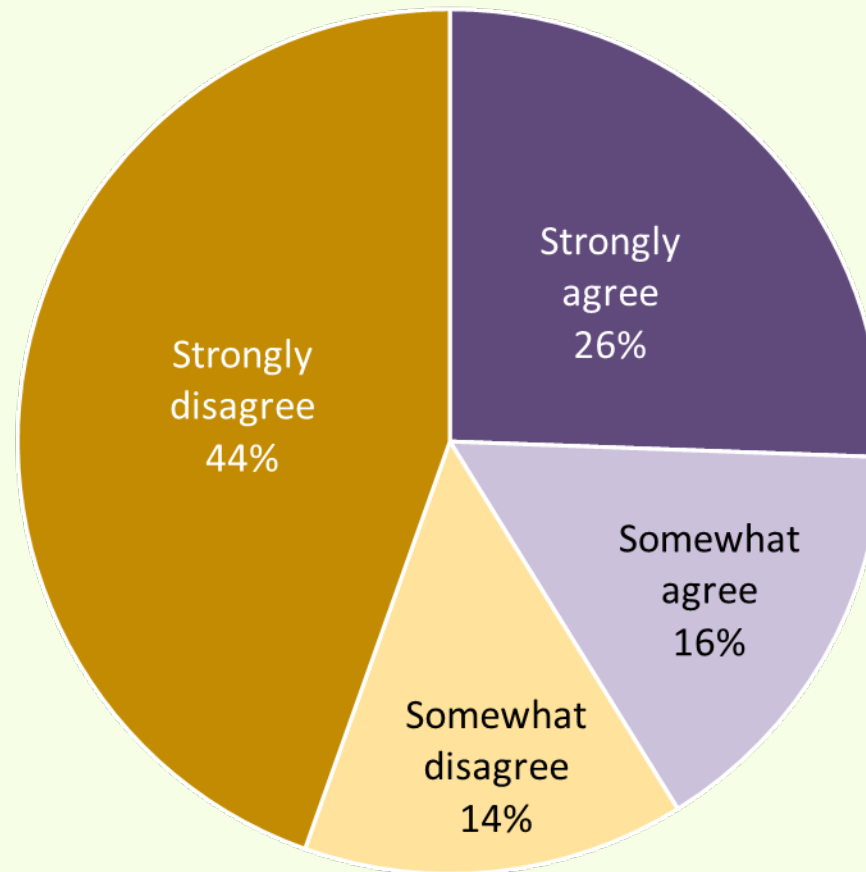
# MORE THAN 2/3 ARE OWNERS

Do you presently own or rent your current primary residence?



# ONE IN FOUR SAY “BEING STUCK” IS REASON TO CONSIDER MOVE

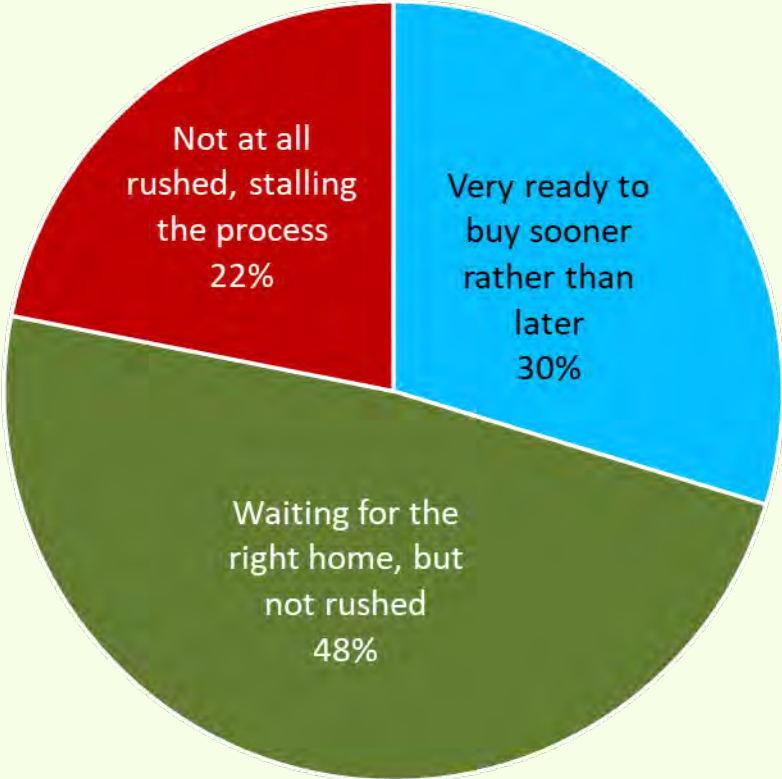
I’m so tired of being stuck in the same place for months, I’m thinking of moving.



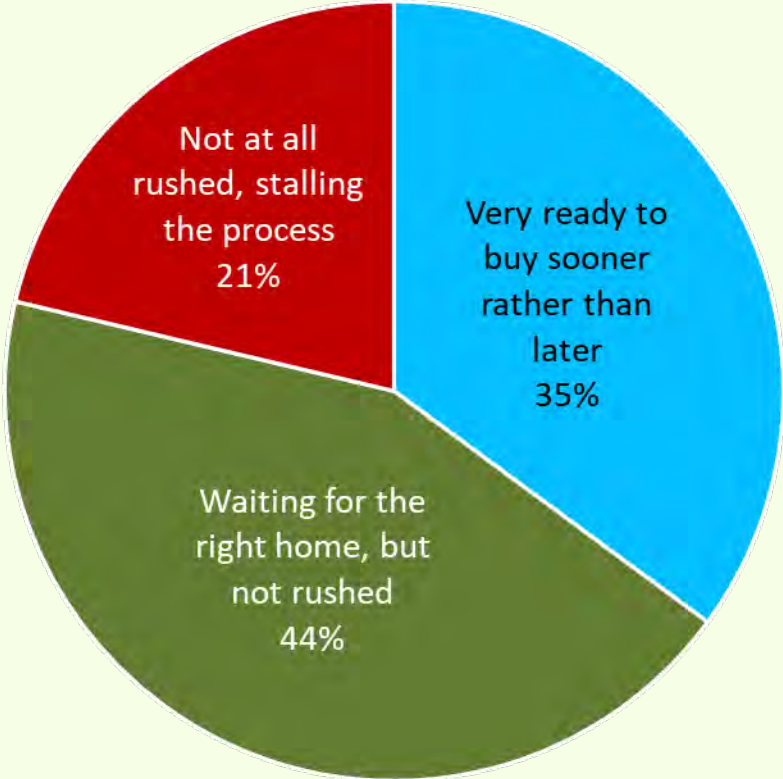
# UPTICK IN % SAYING THEY ARE “VERY READY” TO BUY

When thinking about the pace of your home search process, do you feel...

Wave 8

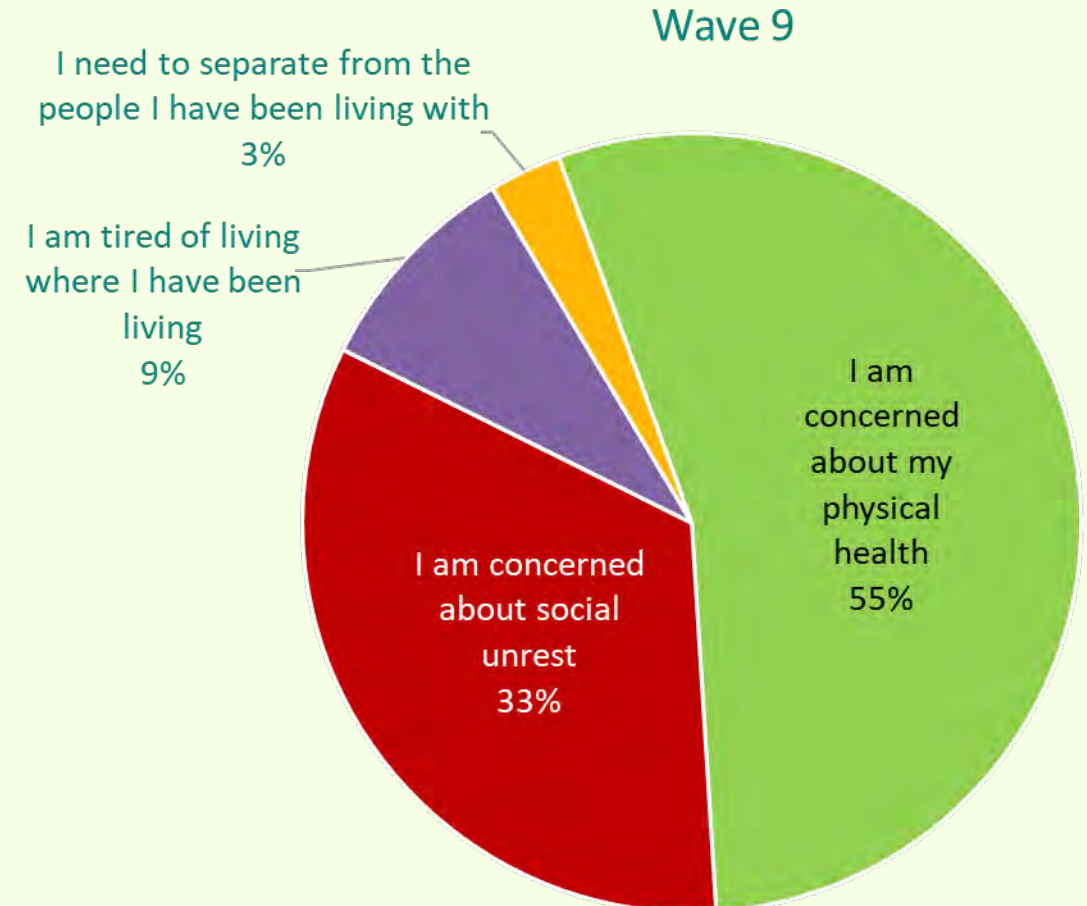
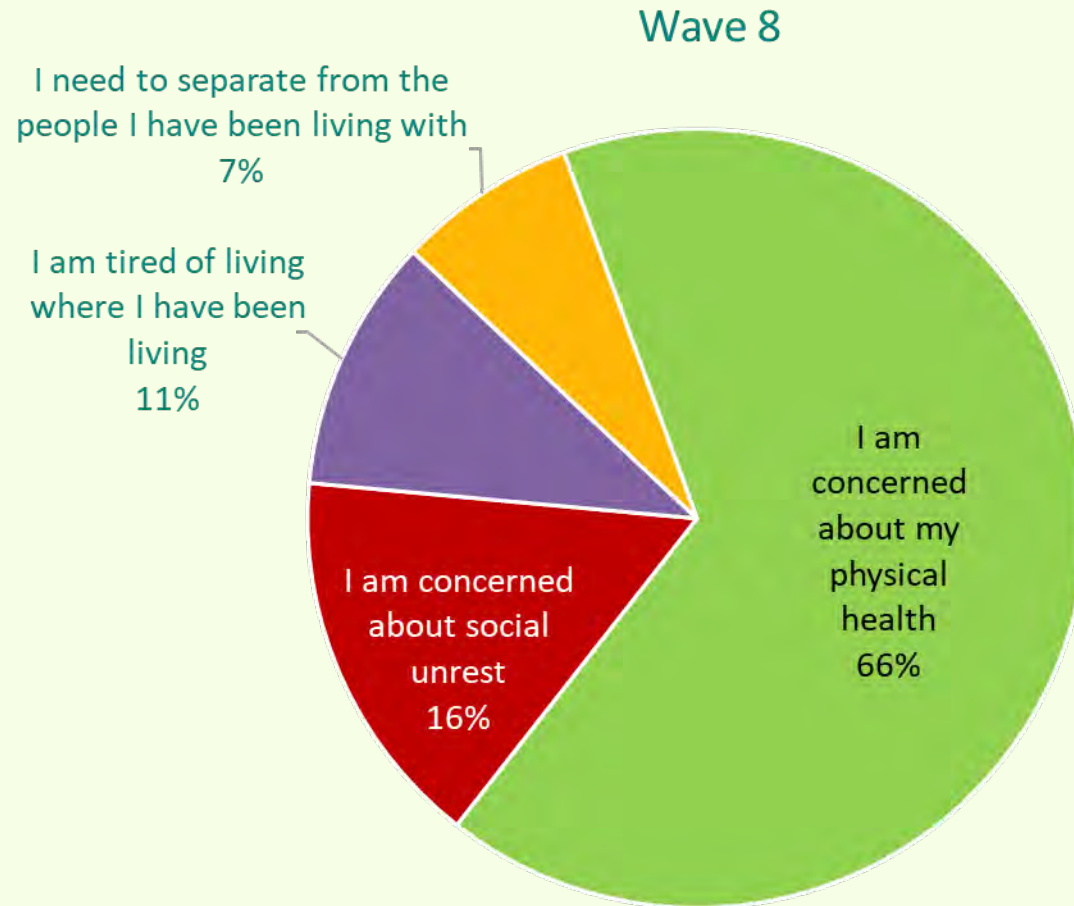


Wave 9



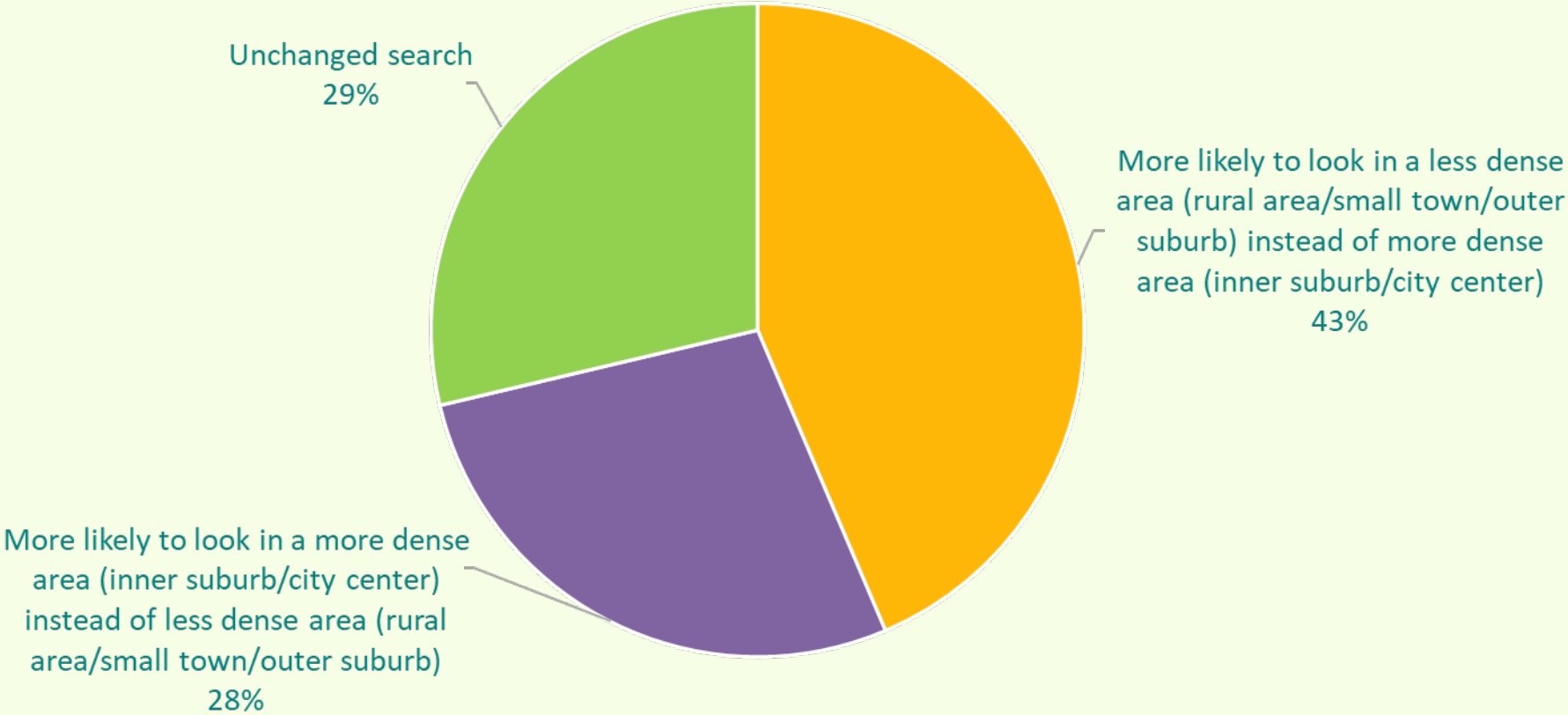
# SOCIAL UNREST CONCERNS INCREASING REASON FOR MOVING

Which reason comes closest for why you are so ready to move?



# HOME-SEEKERS LOOKING FOR LESS DENSE AREAS

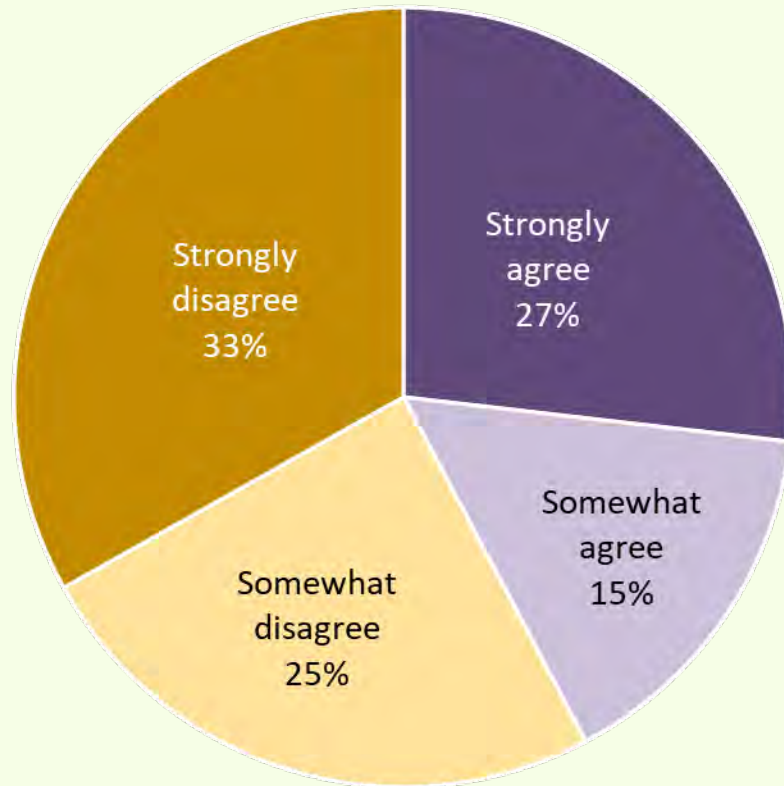
As you re-enter the home buying market, how, if at all, are you expecting your search location to change?



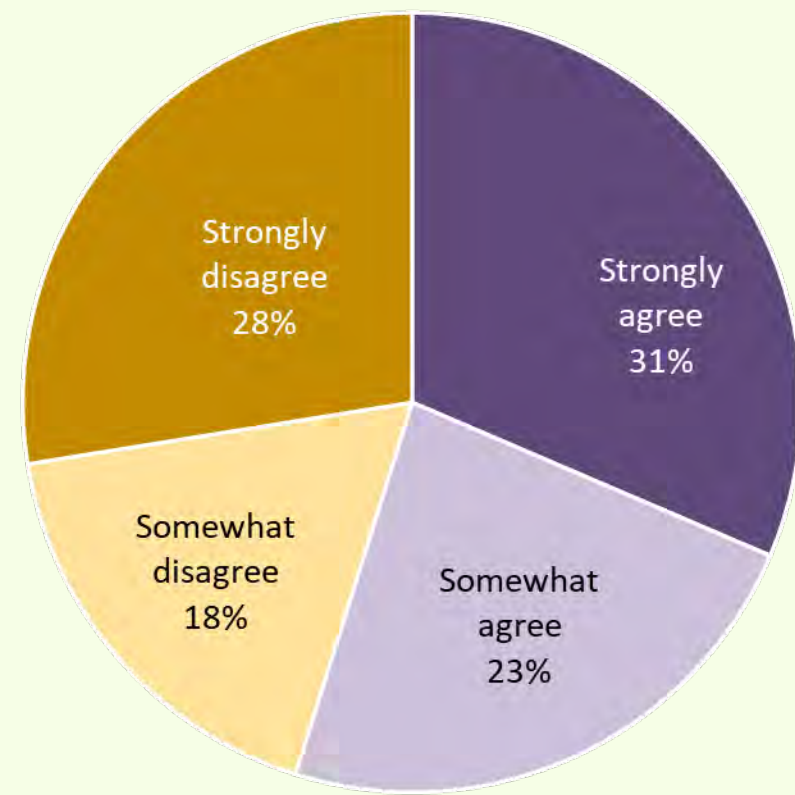
# SCHOOL REOPENING PLANS BECOMING A BIGGER FACTOR

School reopening plans are impacting my decision to buy a home.

Wave 8



Wave 9

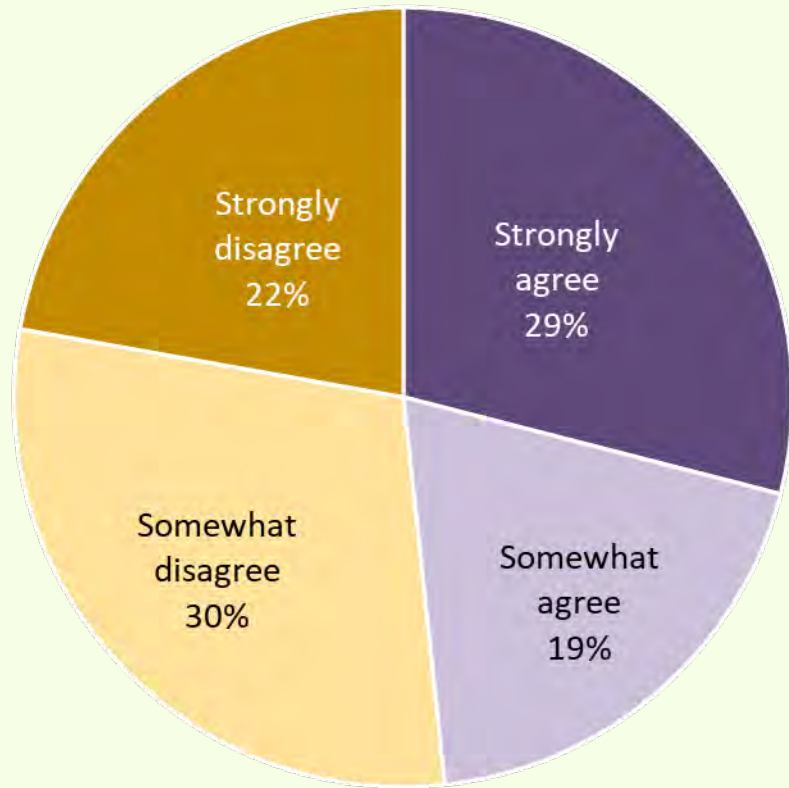




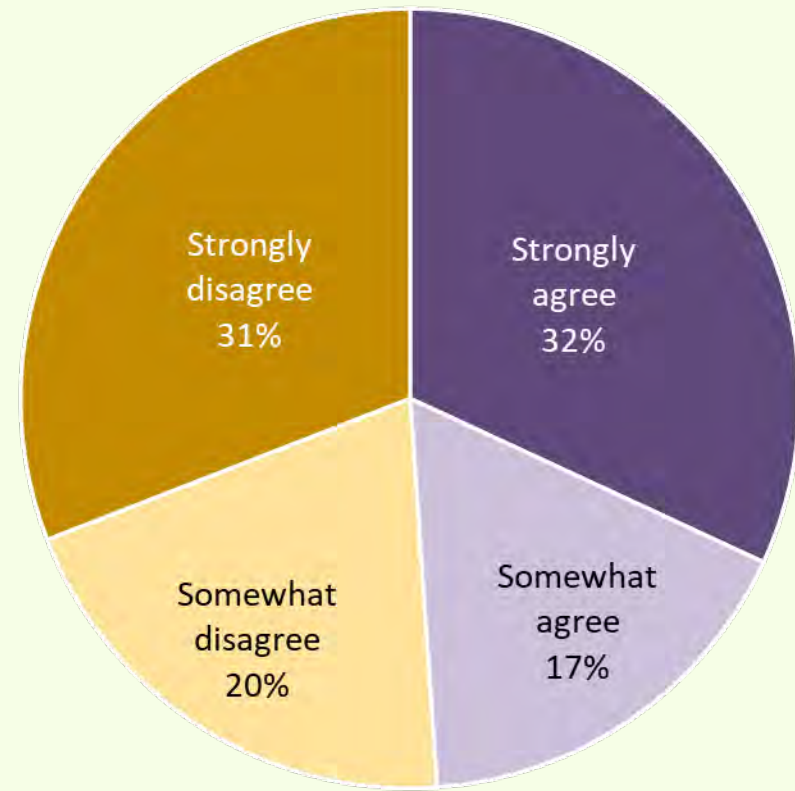
# HALF AGREE: NOW IS THE TIME TO BUY

Now seems like a great time to buy a new home.

Wave 8



Wave 9



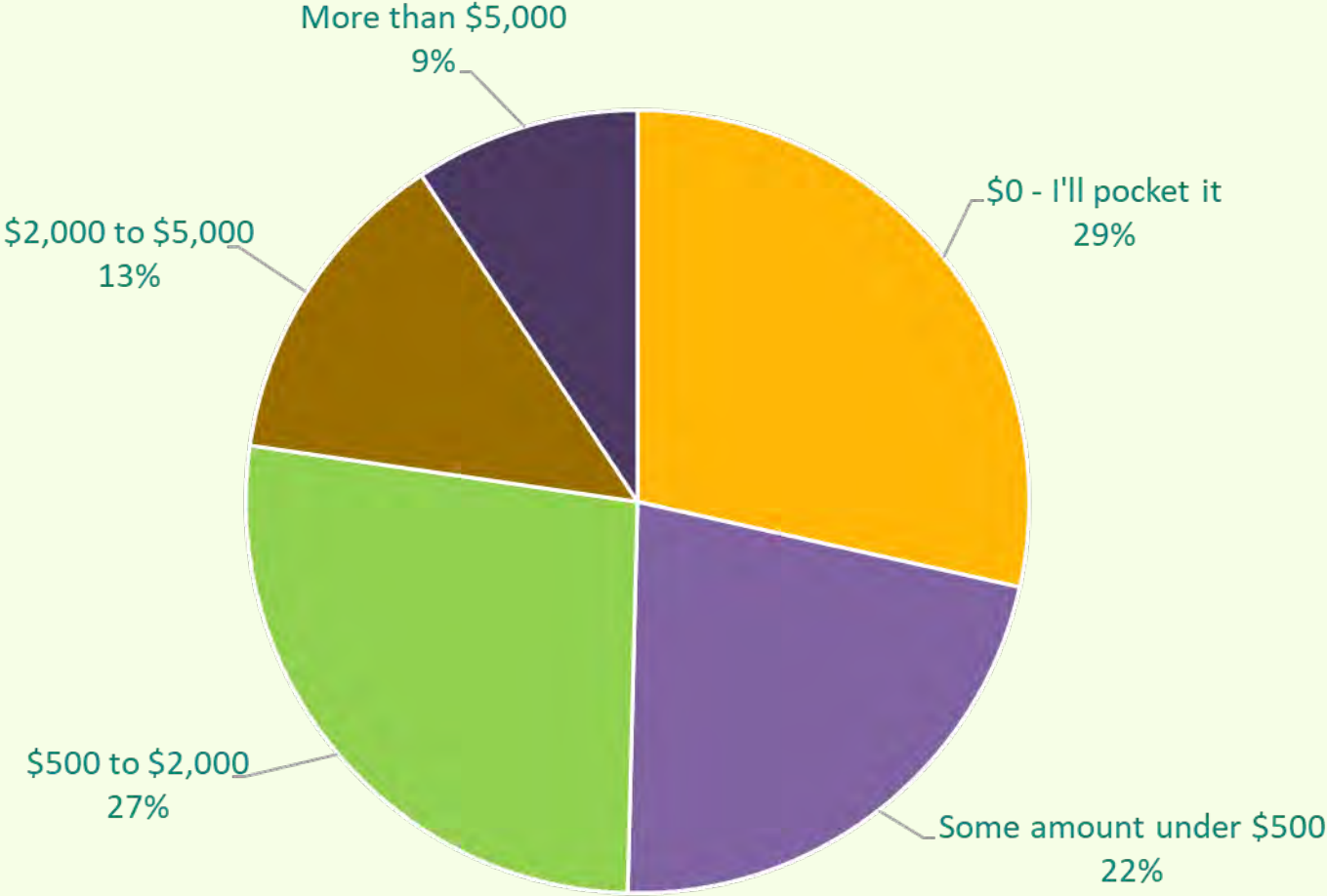
# LOW INTEREST RATES CITED AS TOP REASON TO BUY NOW

Which, if any, of the following are reasons why you agree that now seems like a great time to buy a new home?



# NEARLY 1/4 WILL SHIFT >\$2,000 TO HOME IMPROVEMENTS

How much money do you expect to shift away from travel and leisure spending, and redirect it towards making home improvements?



# QUESTIONS

- What questions do you have about these findings?
- What do you want to ask in Wave 10?



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