

WAVE 18: VACCINES— A DOSE OF REALITY

**Public opinion insights from the Feb. 4, 2021
“Back-to-Normal Barometer”**

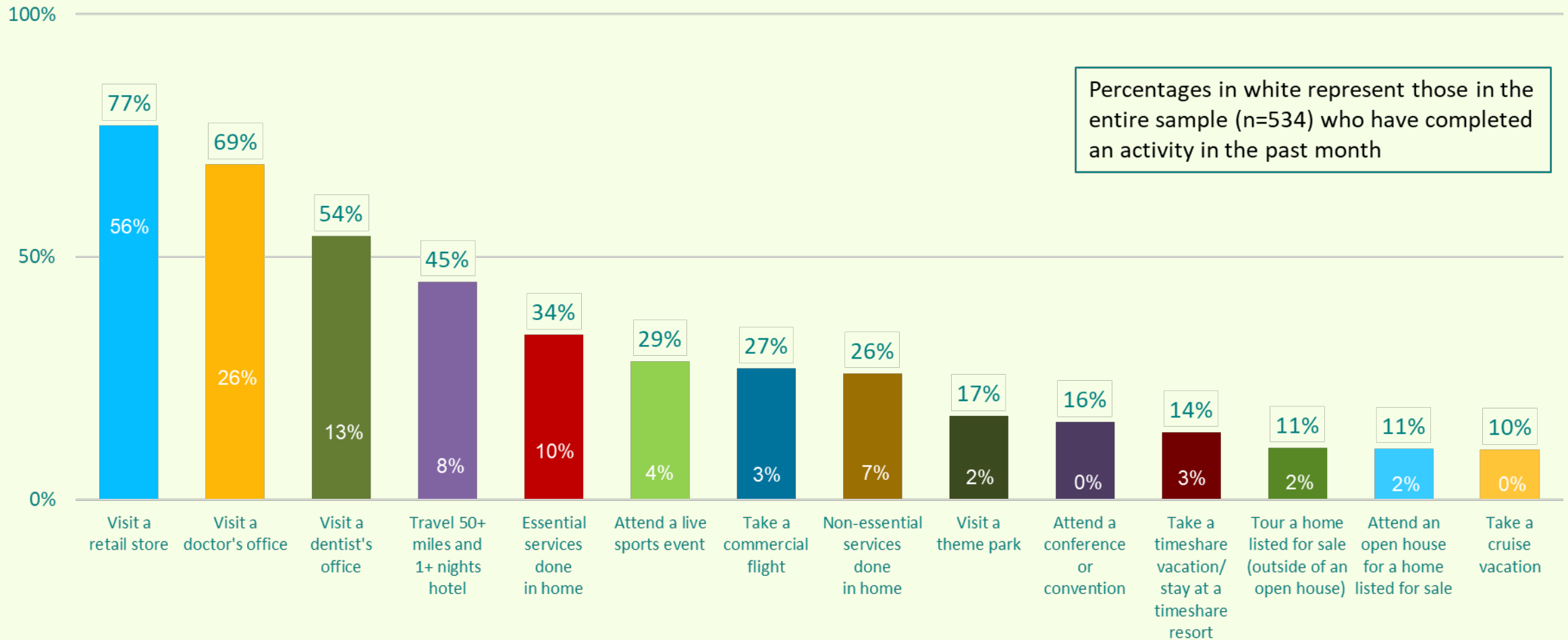
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IMPORTANT: AUDIENCE SAMPLE RECONFIGURED

- Before proceeding through this deck, please note that throughout the Barometer study, we've focused on people who've engaged in certain activities within the past 12 months
 - In April '20, that basically meant everyone had participated pre-pandemic
 - As months wore on, a growing % of respondents participated during the pandemic
 - Now nearly 11 months into the pandemic, nearly all respondents participated during the pandemic
- We realized this progression was omitting respondents who would normally engage in activities, but were not doing so during the pandemic
- Consequently, this month's survey includes respondents who were active between August 2019 and February 2021 (both pre- and during Covid).
 - This helps explain some of the shifts in data you will notice in the next several slides

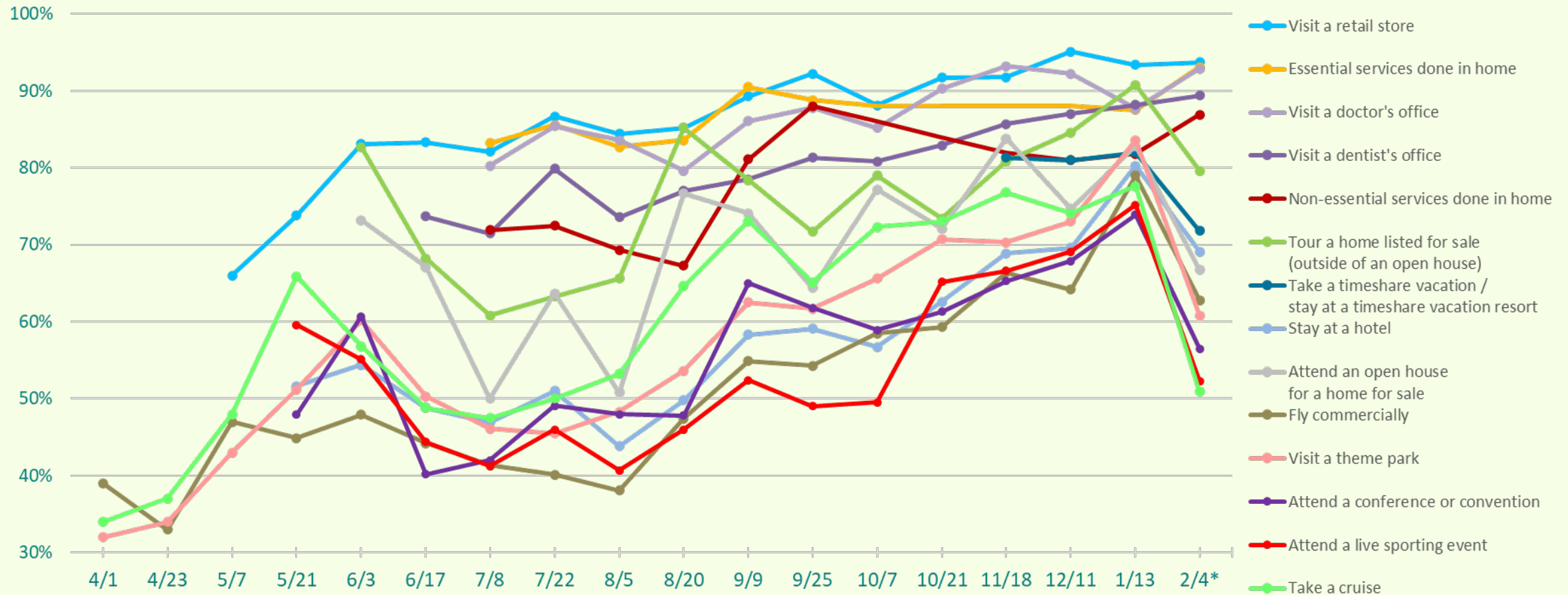
CONTEXT: RESPONDENTS ACTIVELY ENGAGE

Percent who have participated in this activity in the past 18 months.



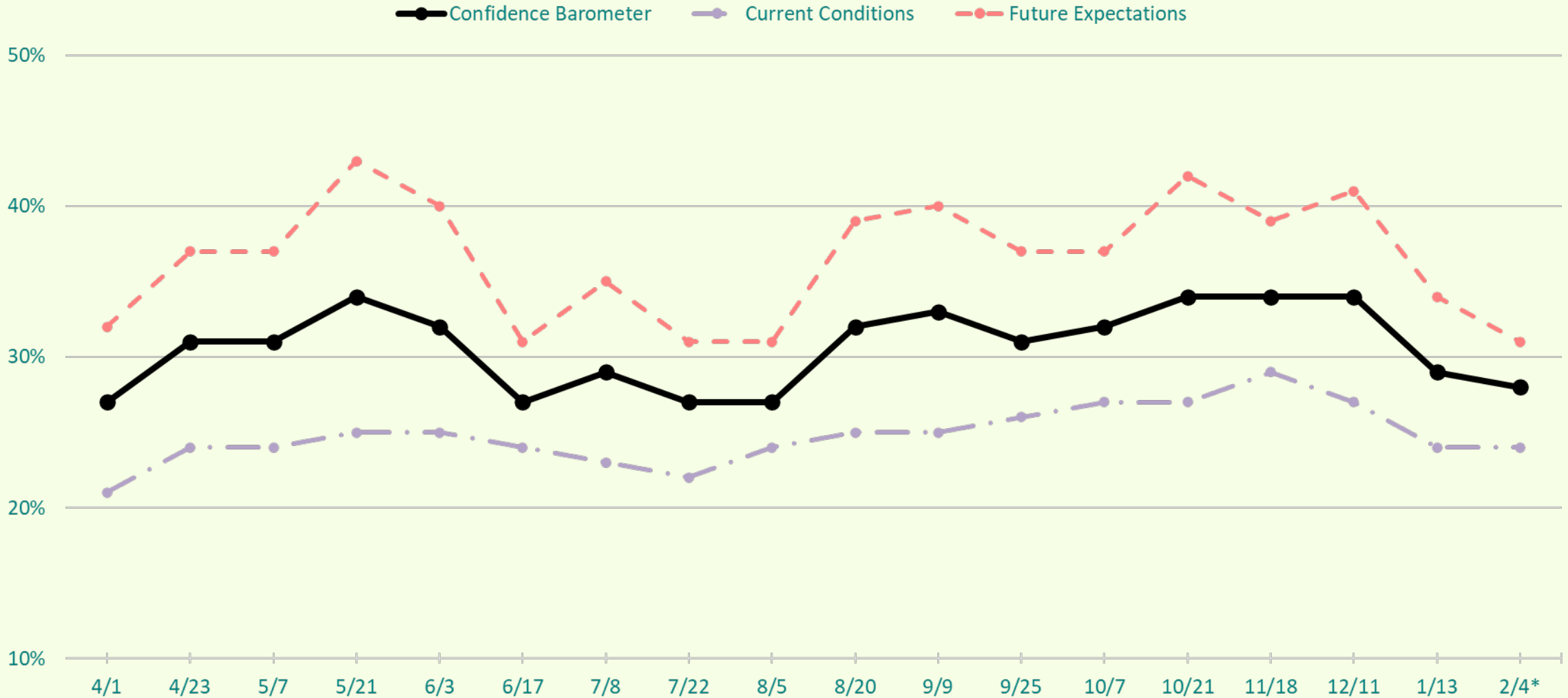
A LONGER LOOK-BACK YIELDS A DIFFERENT PERSPECTIVE

[Among those who have done this activity in the past 12 months:] For each of the following activities, please indicate which of the following conditions is closest to your current point of view: Recently active + Ready to go



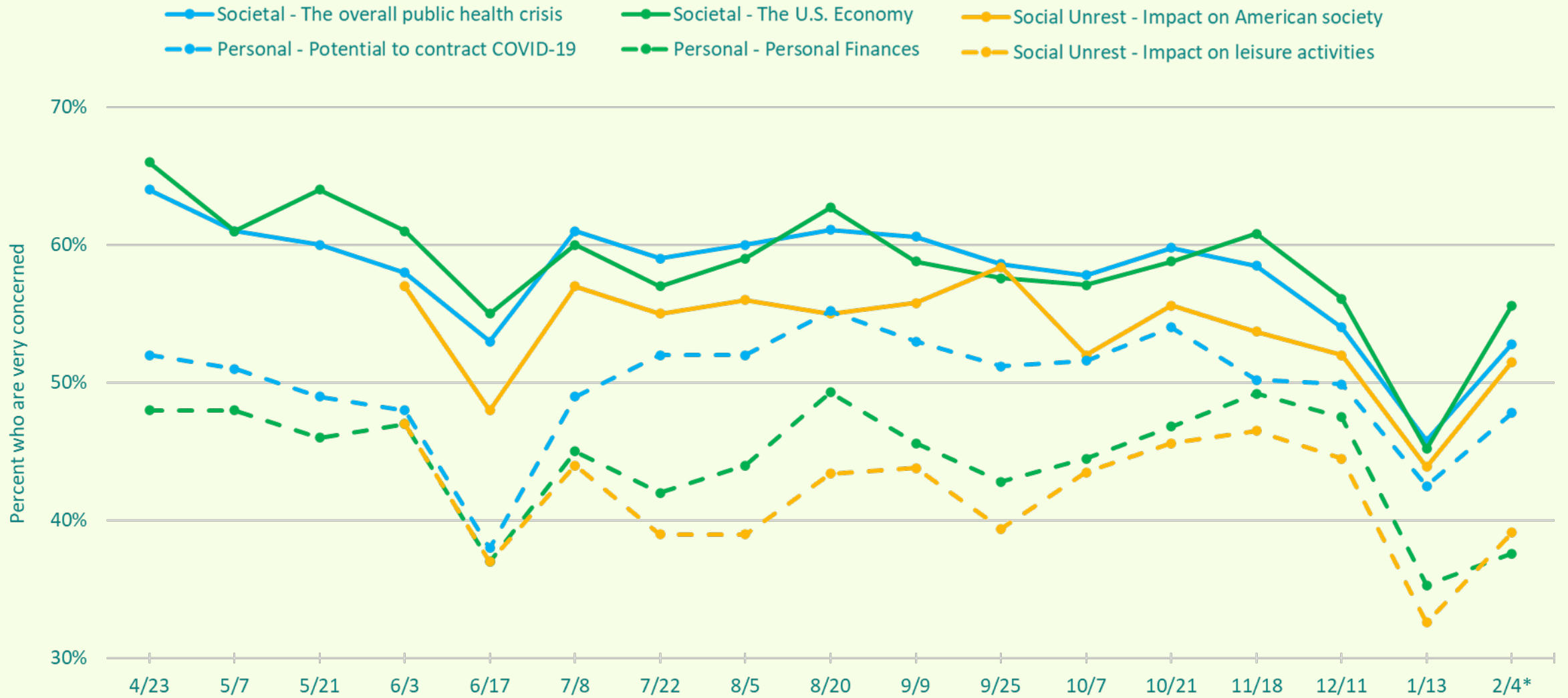
Back to Normal Barometer, Feb. 4, 2021. * denotes having done this in past 18 months

CONFIDENCE BAROMETER REMAINS IN HISTORIC RANGE



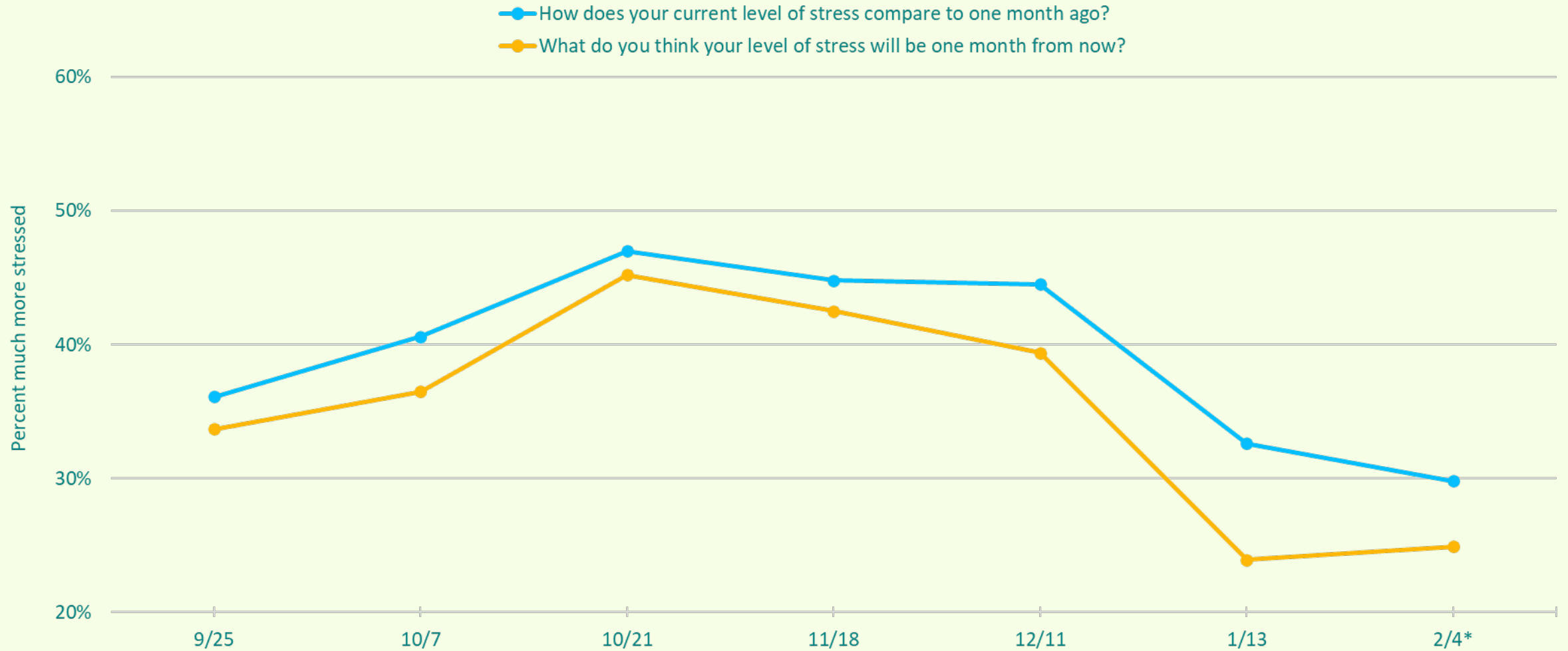
Back to Normal Barometer, Feb. 4, 2021. * denotes look-back of 18 instead of 12 months

PERSONAL/SOCIETAL CONCERNS TICK UP WITH NEW DEFINITION



Back to Normal Barometer, Feb. 4, 2021. * denotes look-back of 18 instead of 12 months

STRESS LEVELS REMAIN CONSTANT SINCE JANUARY

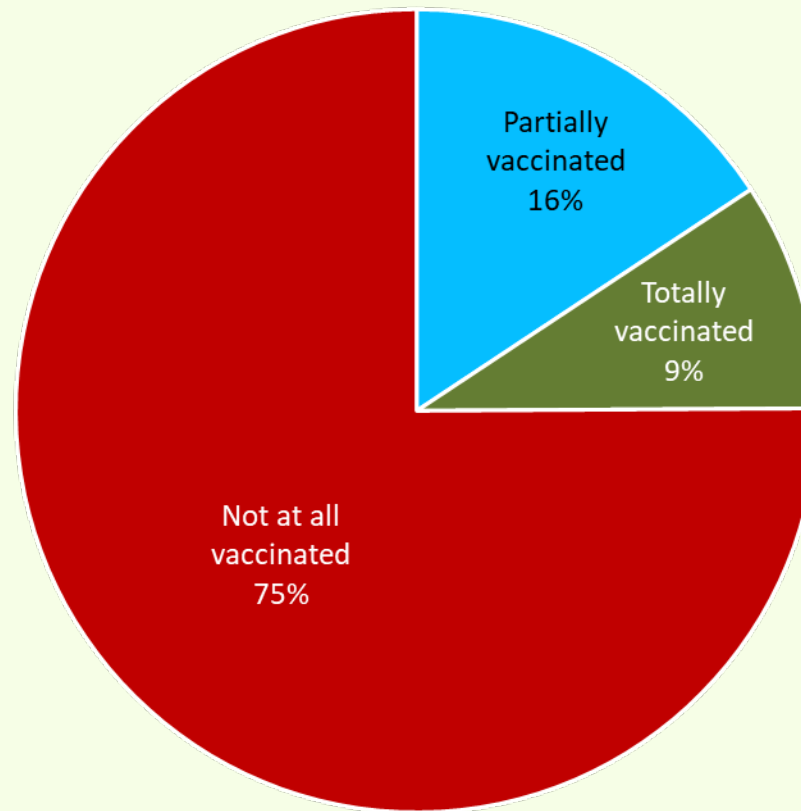


Back to Normal Barometer, Feb. 4, 2021. * denotes look-back of 18 instead of 12 months

Vaccine behaviors and attitudes

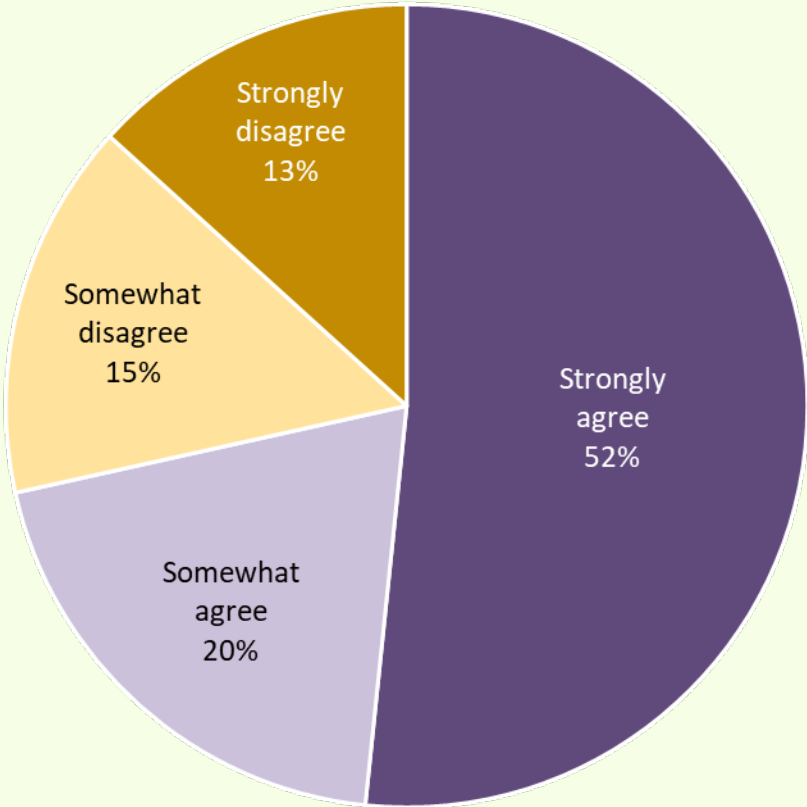
WE'RE STARTING TO SEE GROWING VACCINATION NUMBERS

Have you been partially vaccinated (one shot), totally vaccinated (both shots), or not at all vaccinated against COVID-19?



NEARLY 3/4 LINK VACCINATION TO REOPENING ECONOMY

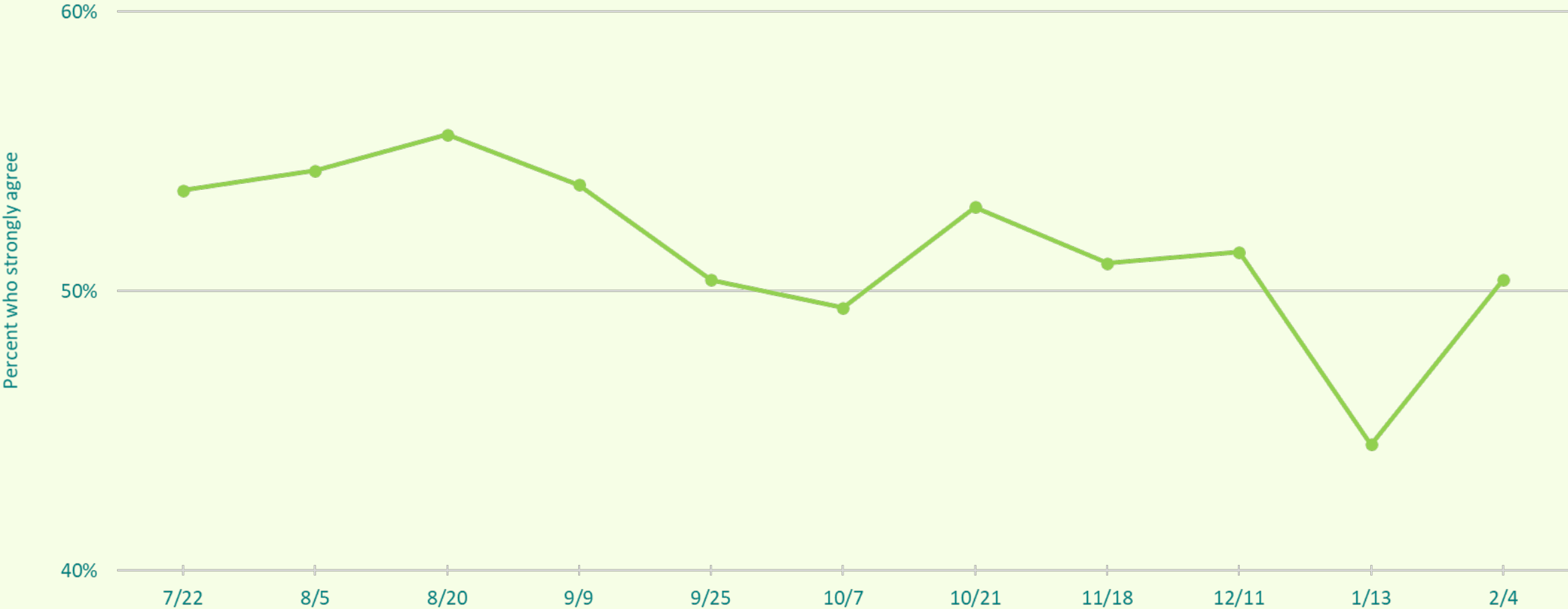
The widespread vaccination of the public is the key to re-opening the economy.



n=534, Back to Normal Barometer, Feb. 4, 2021

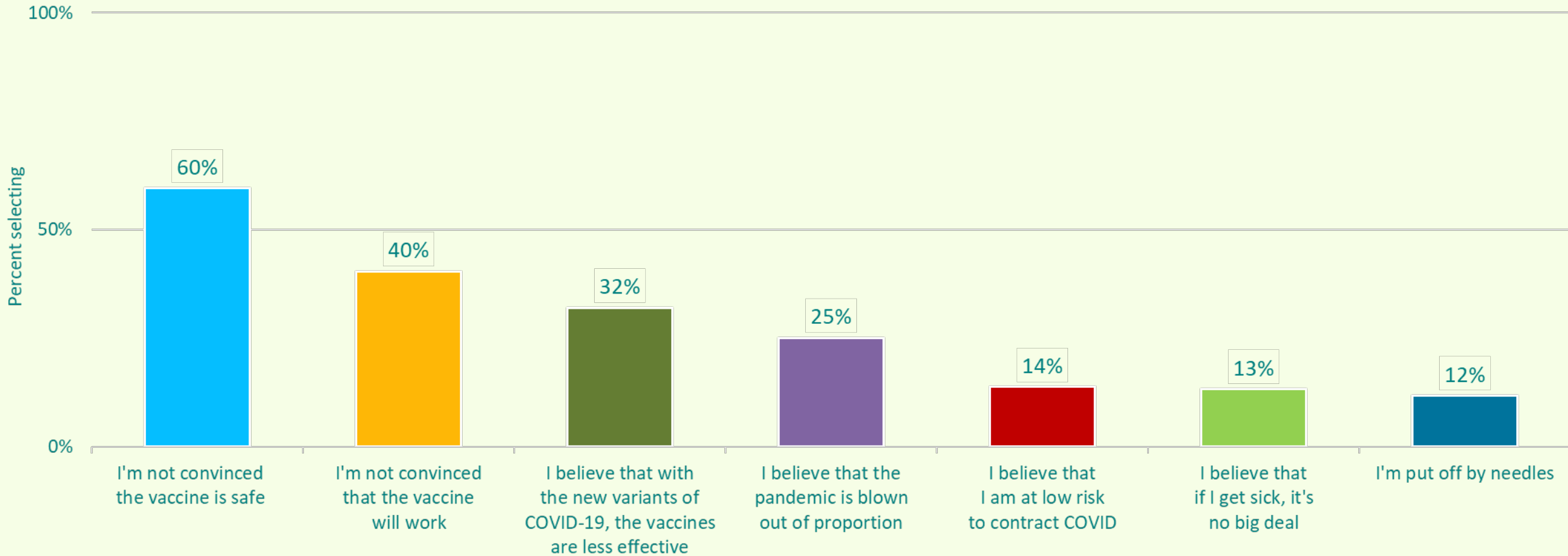
HALF SAY THEY WILL DEFINITELY GET VACCINATED

I will definitely get a COVID-19 vaccine when it is available.



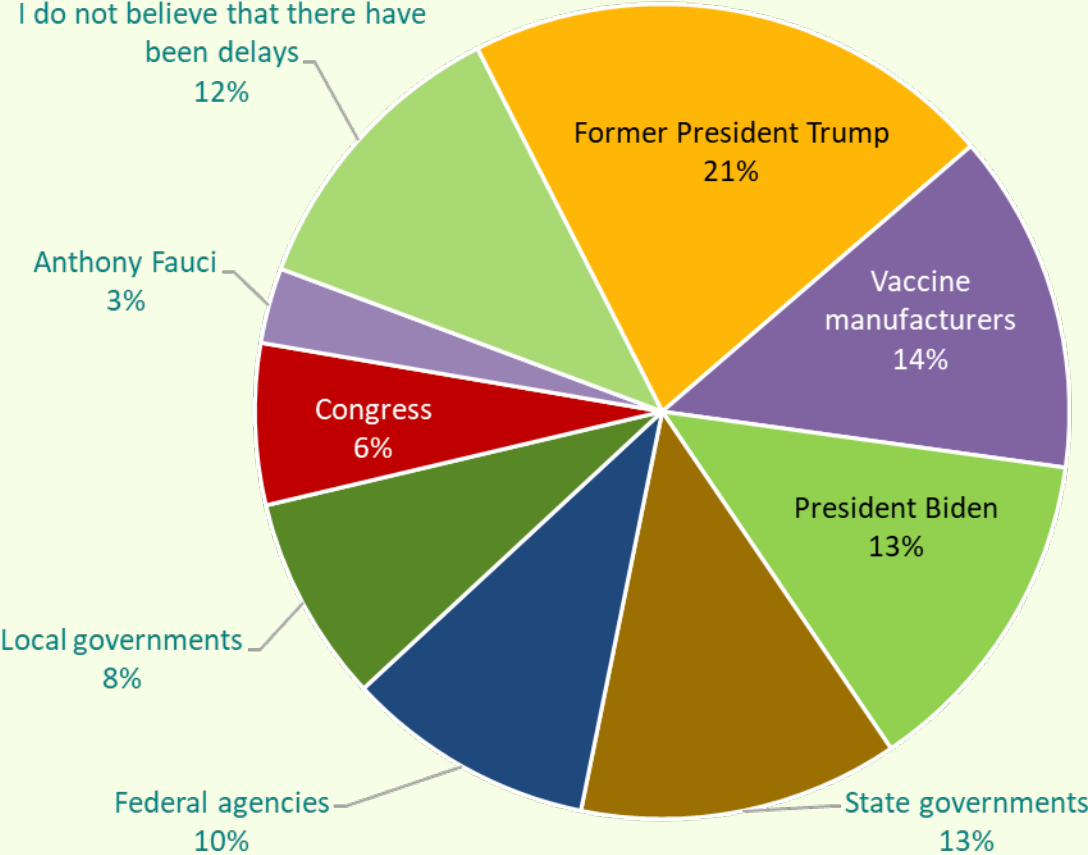
SAFETY & EFFICACY CONCERNS EXPLAIN UNWILLINGNESS

[Among those who are NOT likely to get a vaccine:] Which of the following are reasons you are not likely to get a COVID-19 vaccine once it's available?



BLAME FOR VACCINE DELAYS ARE WIDELY DISTRIBUTED

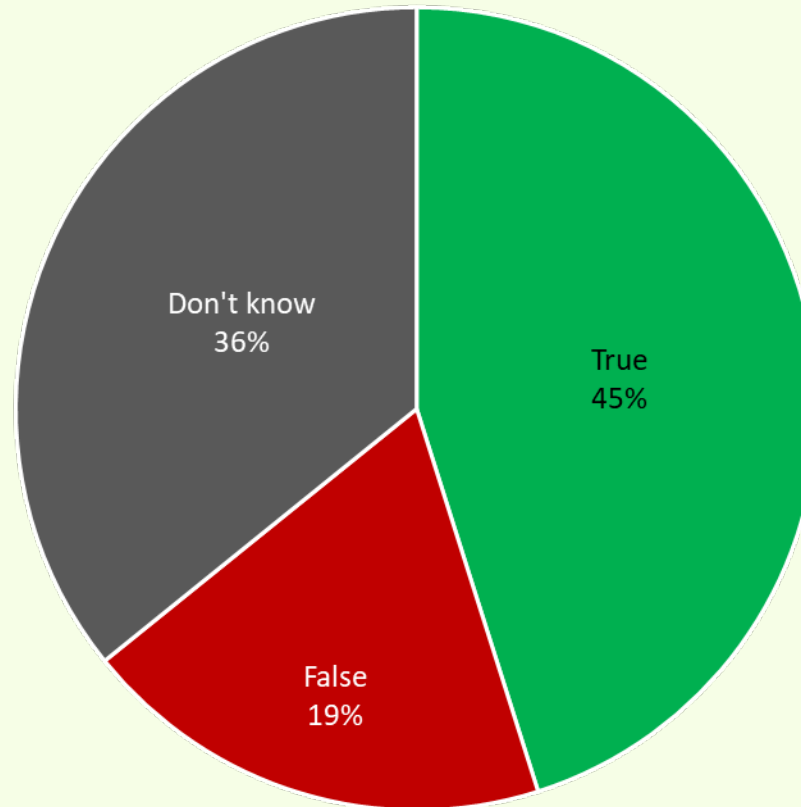
Which entity or person bears the most responsibility for delays in distributing the COVID-19 vaccine?



n=534, Back to Normal Barometer, Feb. 4, 2021

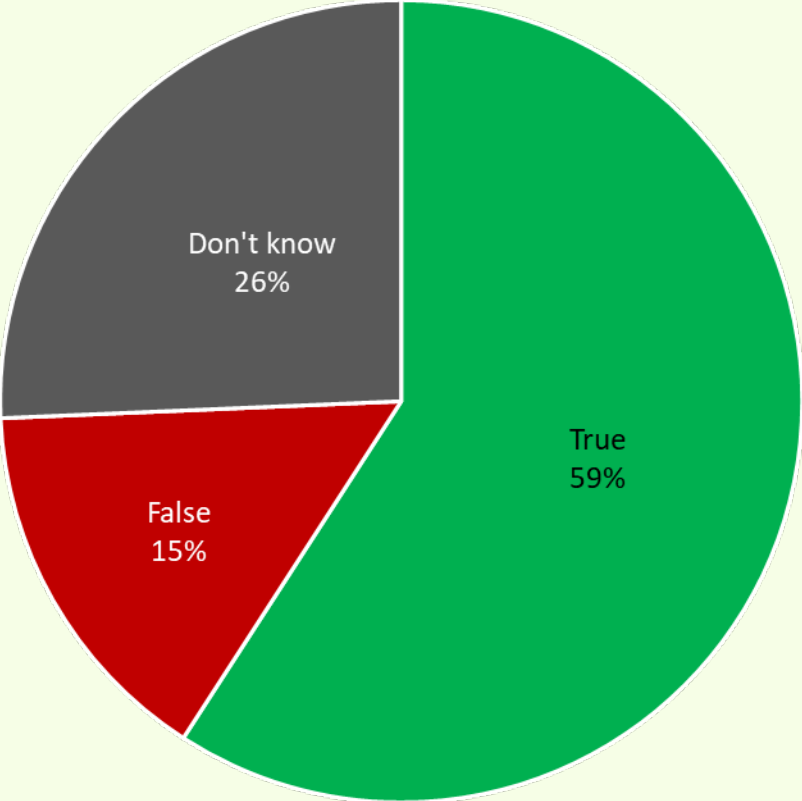
BASIC FACTS ABOUT COVID REMAIN UNKNOWN—PART I

After getting two doses of a COVID-19 vaccine, a person can still transmit COVID-19 to another person and get that other person sick.



BASIC FACTS ABOUT COVID REMAIN UNKNOWN—PART II

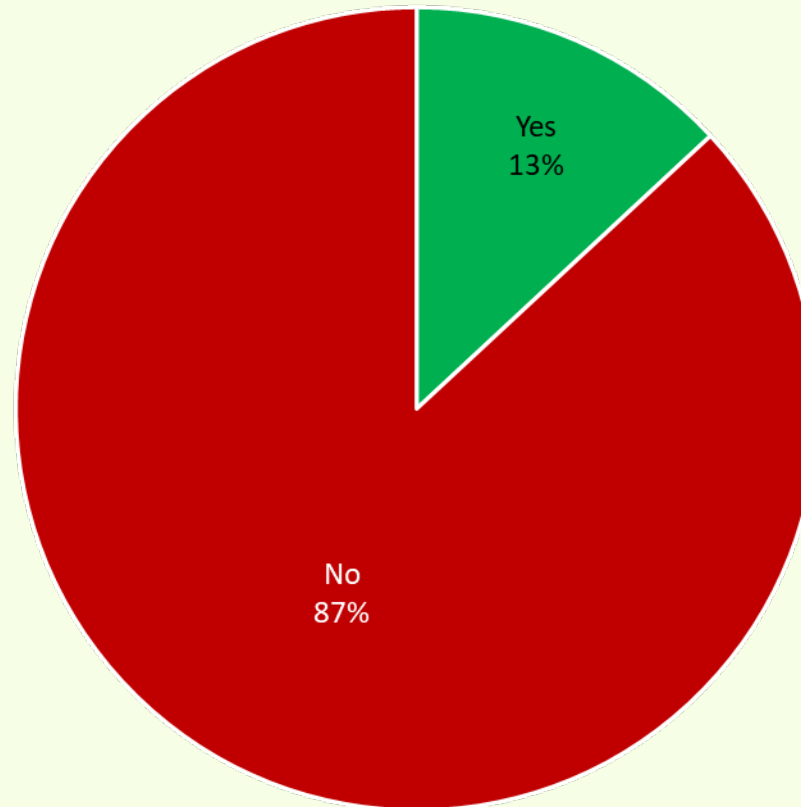
After suffering from COVID-19, a person can still transmit COVID-19 to another person and get that other person sick.



n=534, Back to Normal Barometer, Feb. 4, 2021

ONE OUT OF EIGHT HAVE HAD COVID THEMSELVES

Have you ever been ill with COVID-19?



LISTENING TO AMERICA: IN-DEPTH INTERVIEWS



PERSUADING THE HESITANT WON'T BE EASY

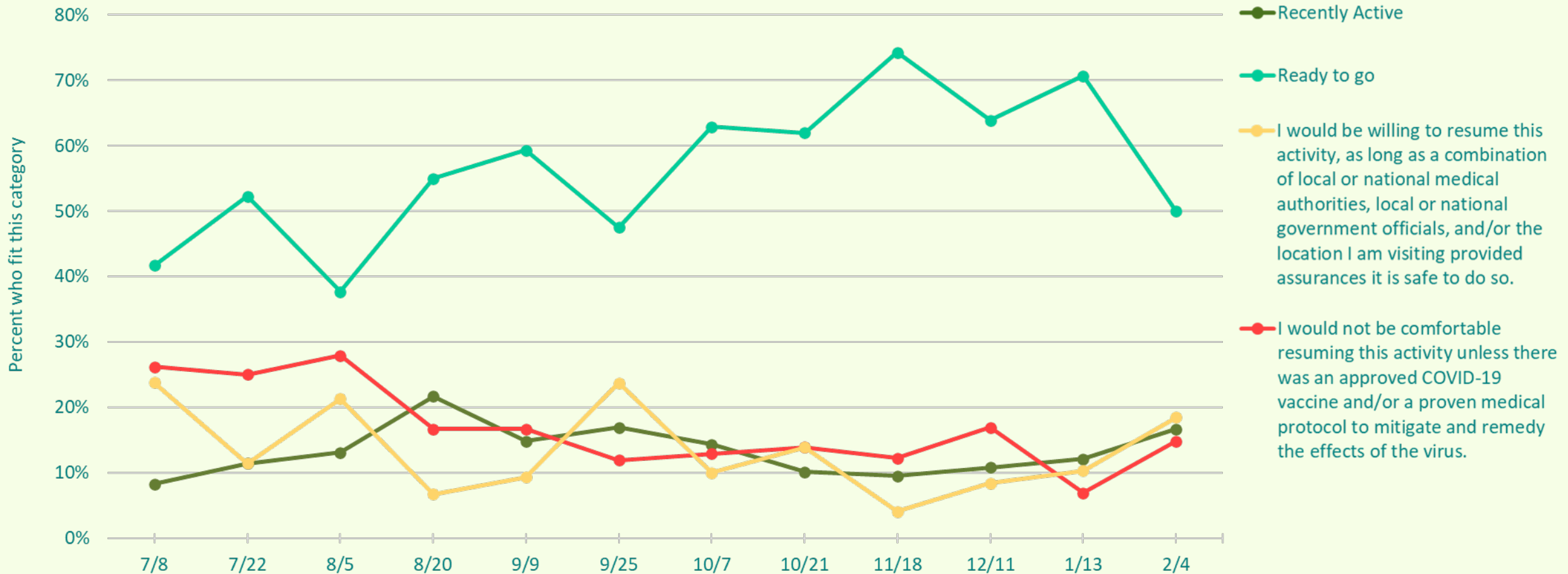
- Those not planning to get vaccinated cited these reasons:
 - The vaccine was developed much more quickly than others; they don't know enough about it, including side effects
 - It's not a typical vaccine (e.g., flu) – it doesn't contain COVID-19, only “boosters”
 - They don't trust the media's reporting on COVID-19 – they're “dishonest” and they focus on unusual cases rather than what most Americans would find useful
 - They lack trust in their doctor on this issue
 - They believe they're taking the necessary precautions, but if they were infected, they'd recover; they know others have

Ready to go



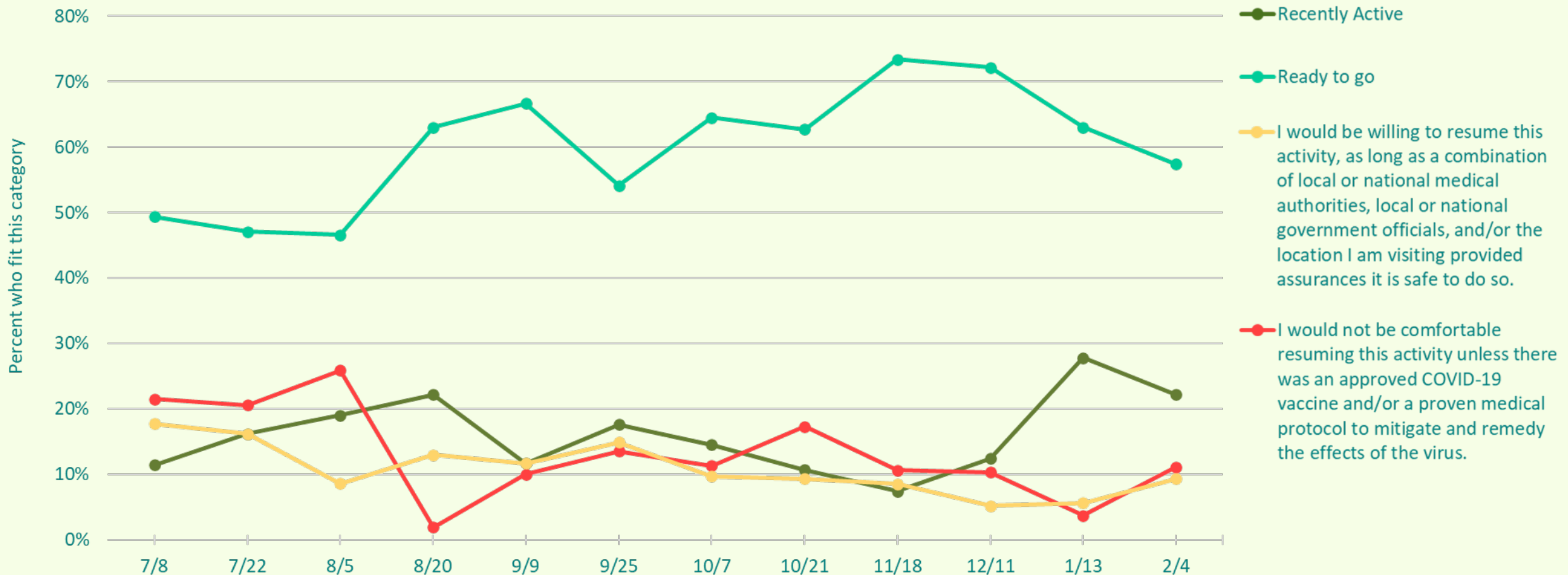
LONGER LOOK-BACK EATS INTO WILLINGNESS TO ATTEND OPEN HOUSE

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



LONGER LOOK-BACK EATS INTO WILLINGNESS TO TOUR A HOME

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



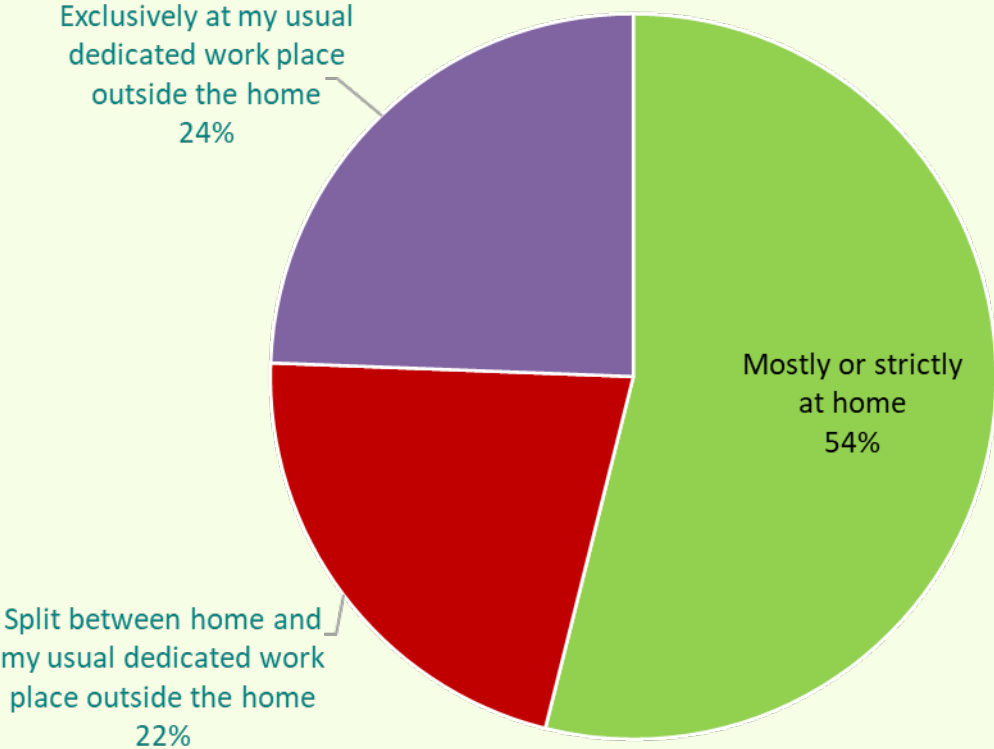
NAR



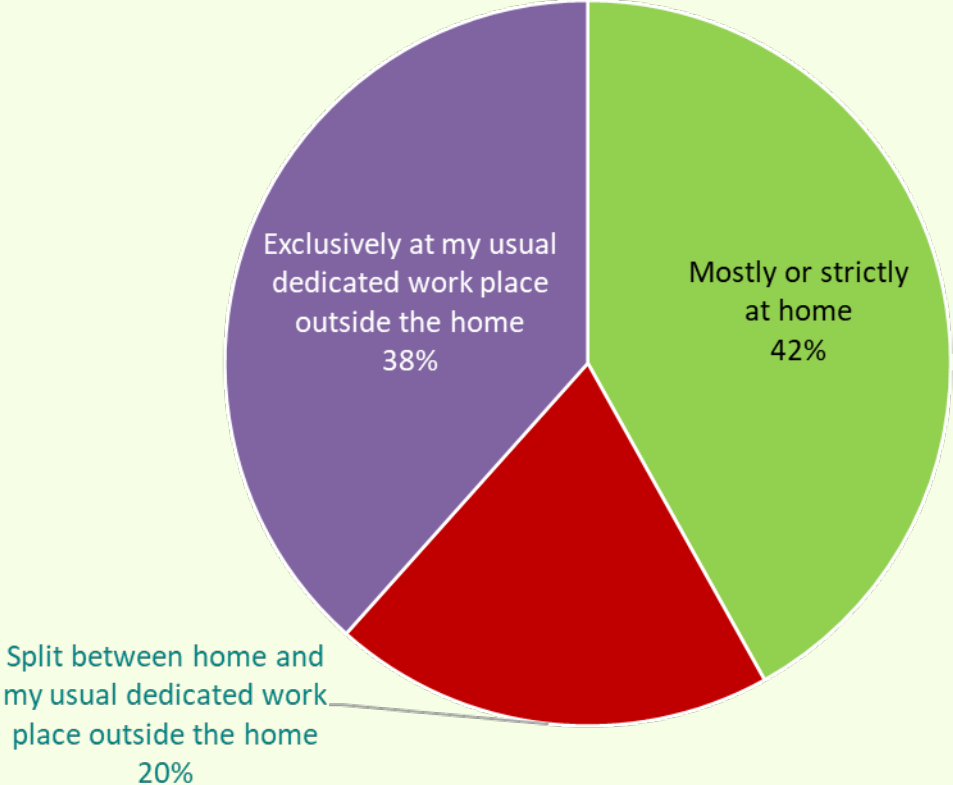
COMPARED TO JUNE, PEOPLE ARE RETURNING TO THE OFFICE

Are you presently working from home or in a dedicated work place?

Wave 6



Wave 18

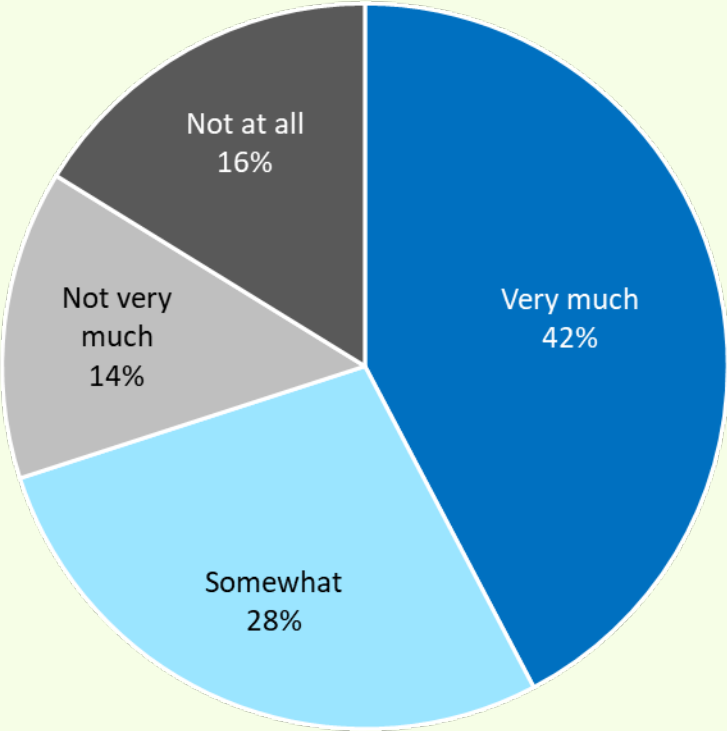


n=332, n=320, Back to Normal Barometer, Feb. 4, 2021

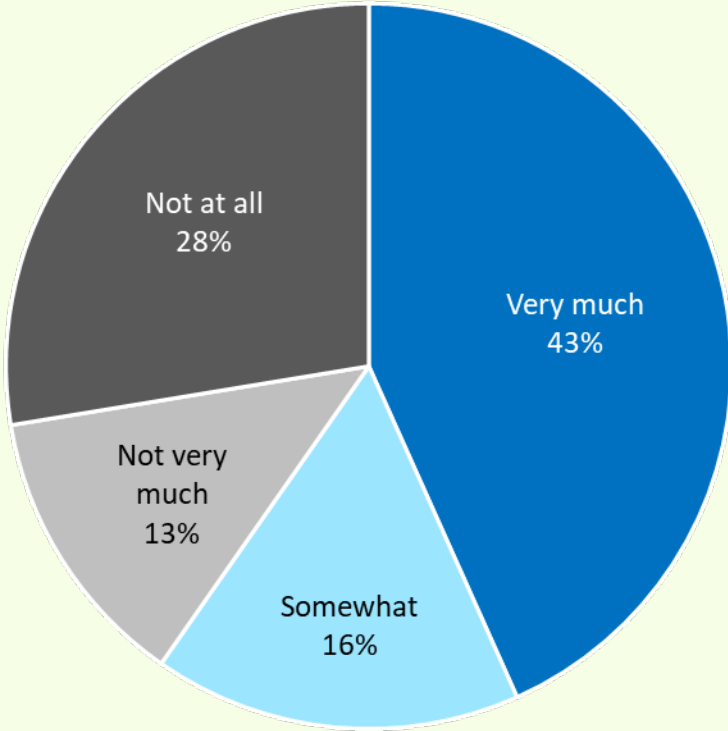
EAGERNESS REMAINS TO GET BACK TO THE OFFICE

[Among those who work mostly or strictly at home:] How eager are you to return full time to your workplace outside of your home, relative to three months ago?

Wave 17



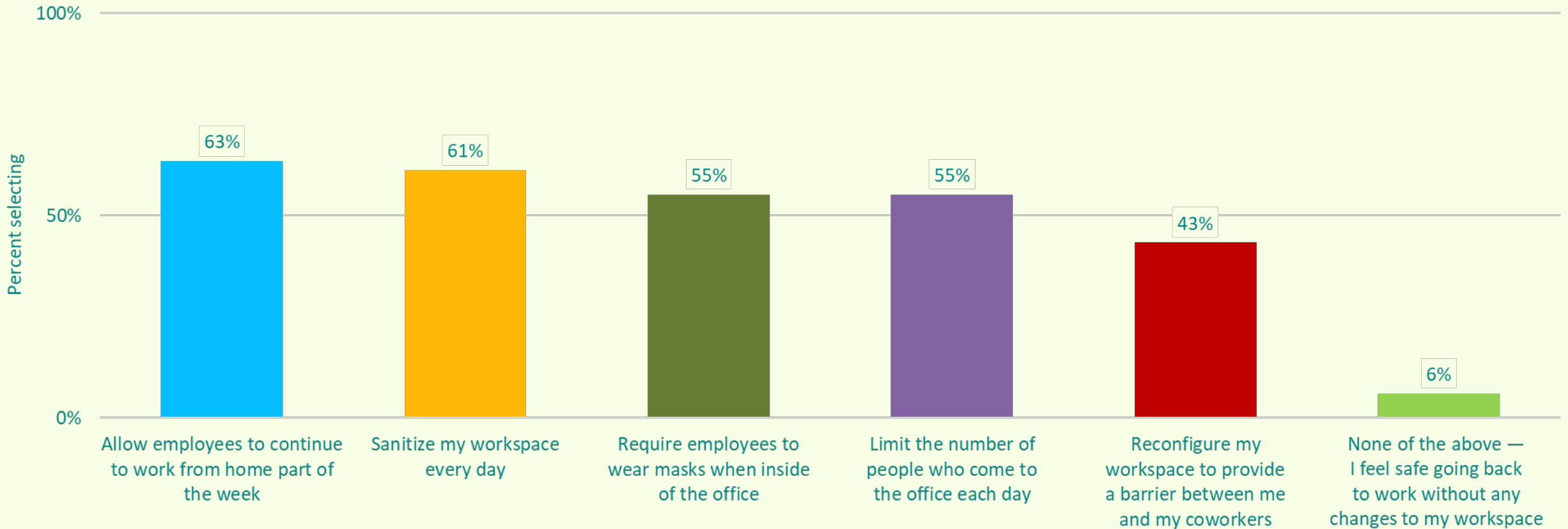
Wave 18



n=130, n=134, Back to Normal Barometer, Feb. 4, 2021

WFH-ERS WANT FLEXIBILITY & OFFICE HEALTH PRECAUTIONS

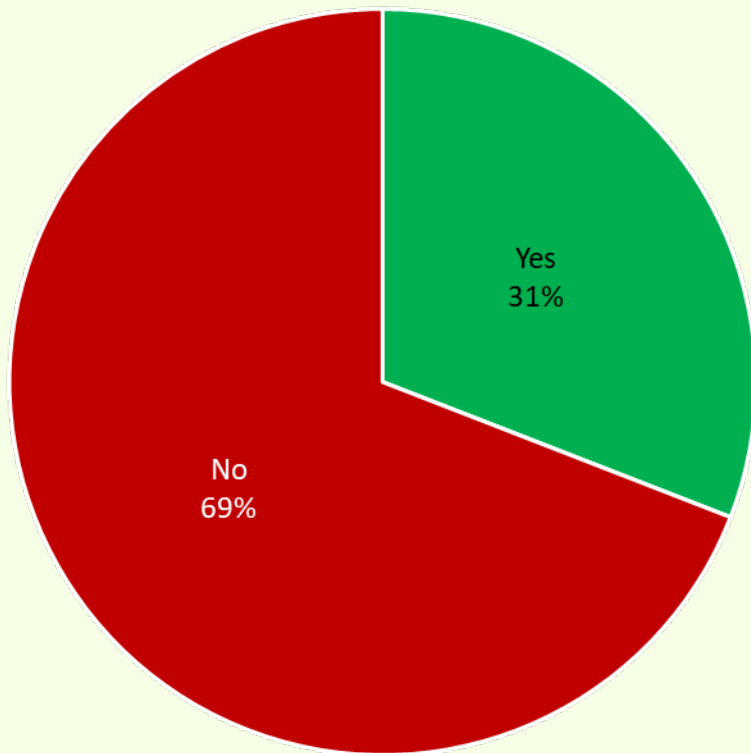
[Among those who work mostly or strictly at home:] In order to feel more comfortable returning to the workplace, which, if any of the following would you expect your employer to do?



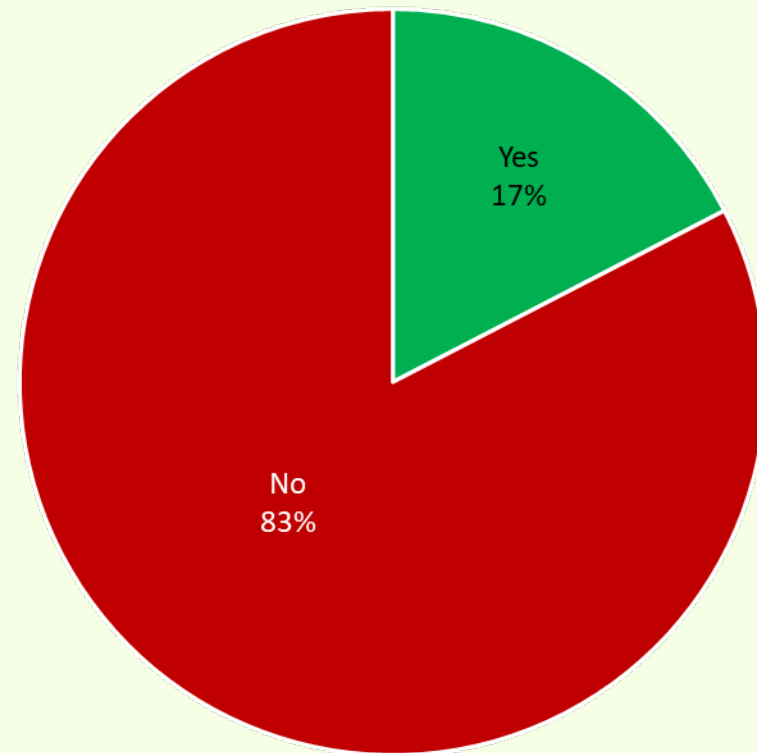
MOST DIDN'T HAVE OTHER GENERATIONS MOVE IN

Did an additional generation of family members join your household during the pandemic?

Wave 17

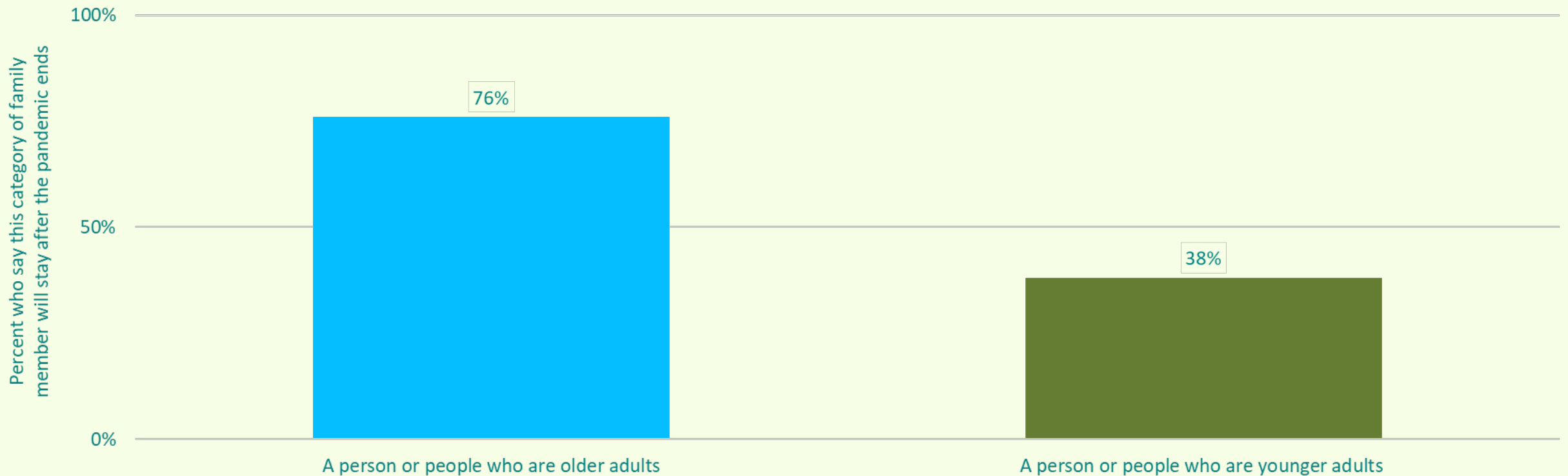


Wave 18



IT WAS OLDER GENERATIONS WHO MOVED IN, NOT YOUNGER

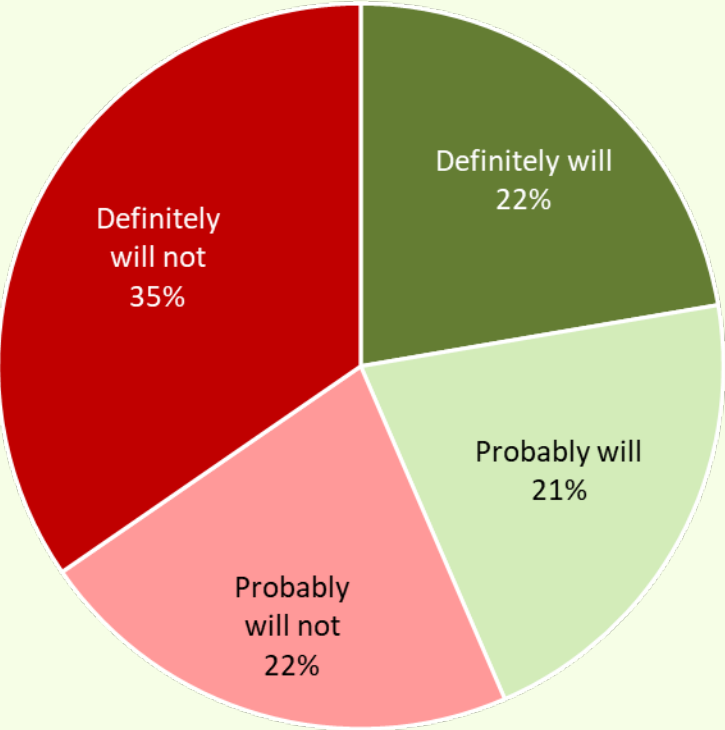
[Among those who had an additional generation of family members join their household during the pandemic, and expect that the living arrangement will continue after the pandemic is over:] Which best describes the person or people that you expect will continue to live with you after the pandemic is over?



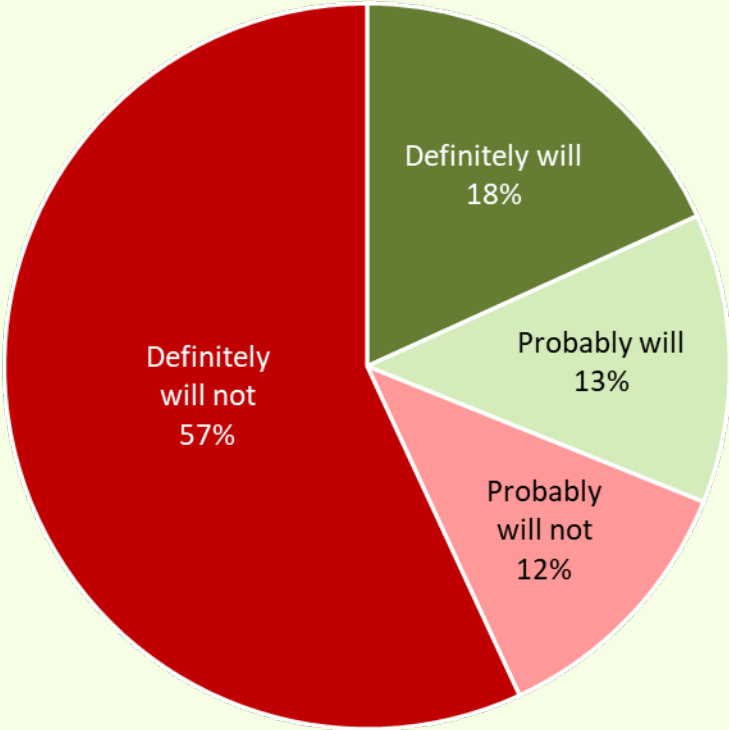
MUCH HIGHER % SAY THEY WILL NOT RELOCATE

How likely are you to relocate, or move to a location more than 50 miles from your present residence, over the next six months?

Wave 17



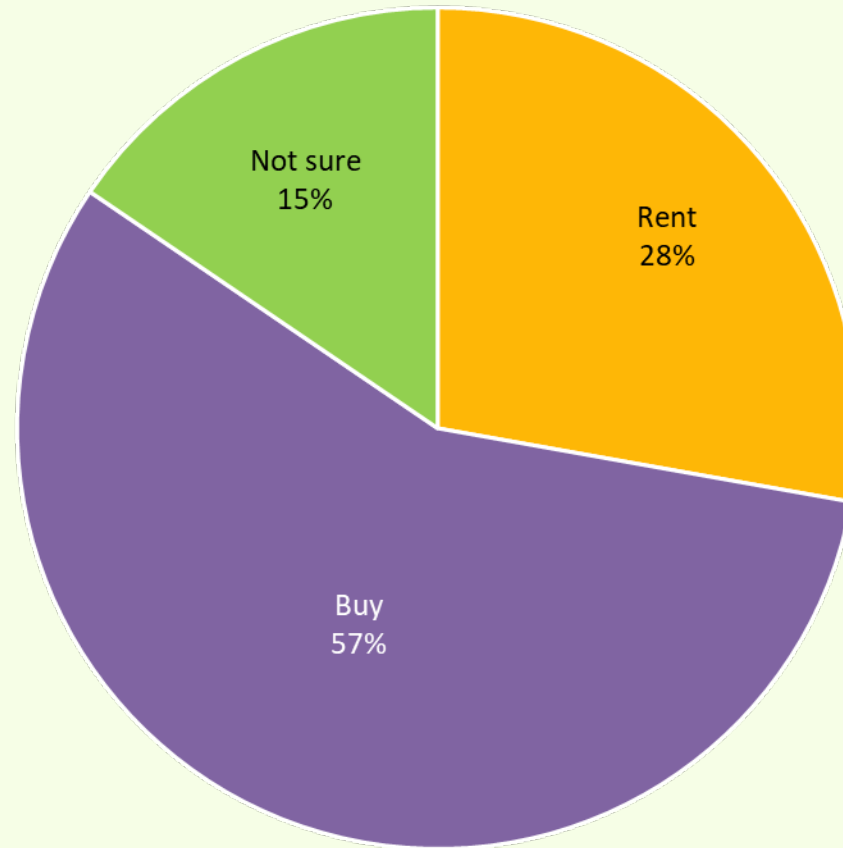
Wave 18



n=485, n=534, Back to Normal Barometer, Feb. 4, 2021

MOST OF THOSE WHO RELOCATE WILL PLAN TO BUY

[Among those who will definitely relocate, or move to a location more than 50 miles from their present residence over the next six months:] As you think about your upcoming relocation, would you plan to...



QUESTIONS

- What questions do you have for us?
- What would you like to ask in Wave 19?



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