

WAVE 19: IS THIS FOR REAL?

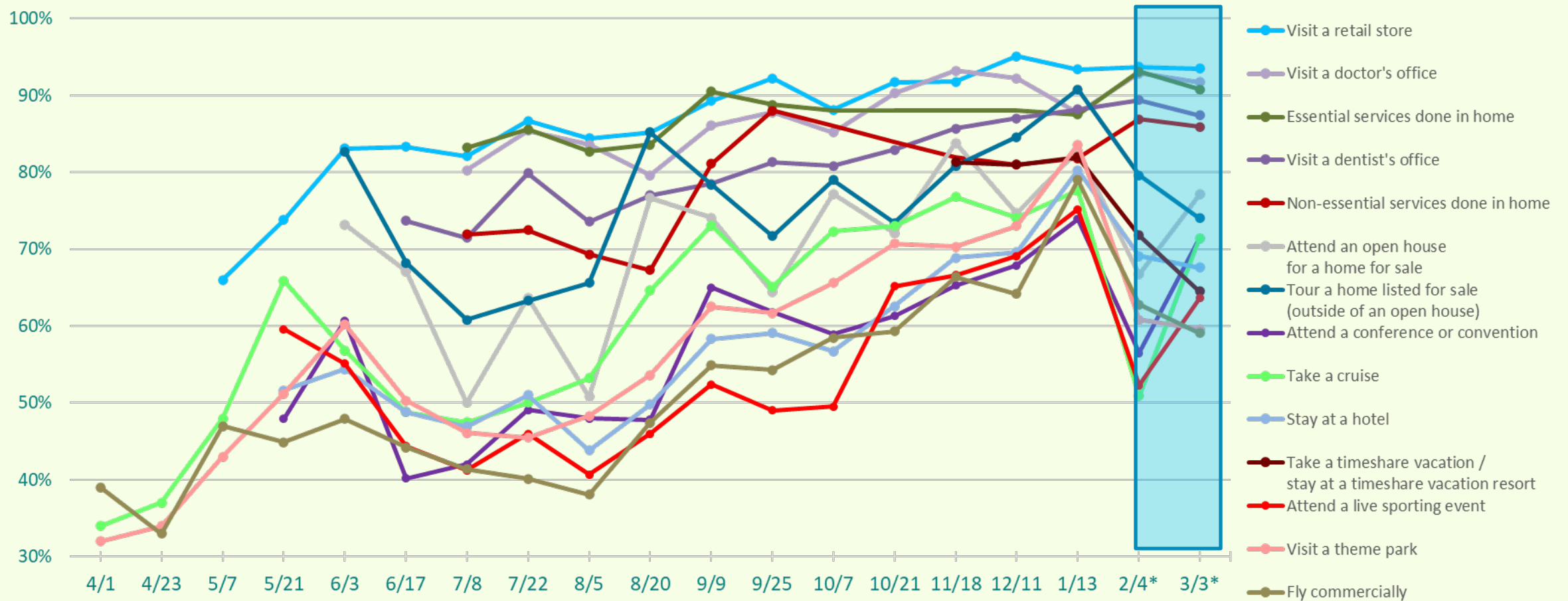
Public opinion insights from the Mar. 3, 2021
“Back-to-Normal Barometer”

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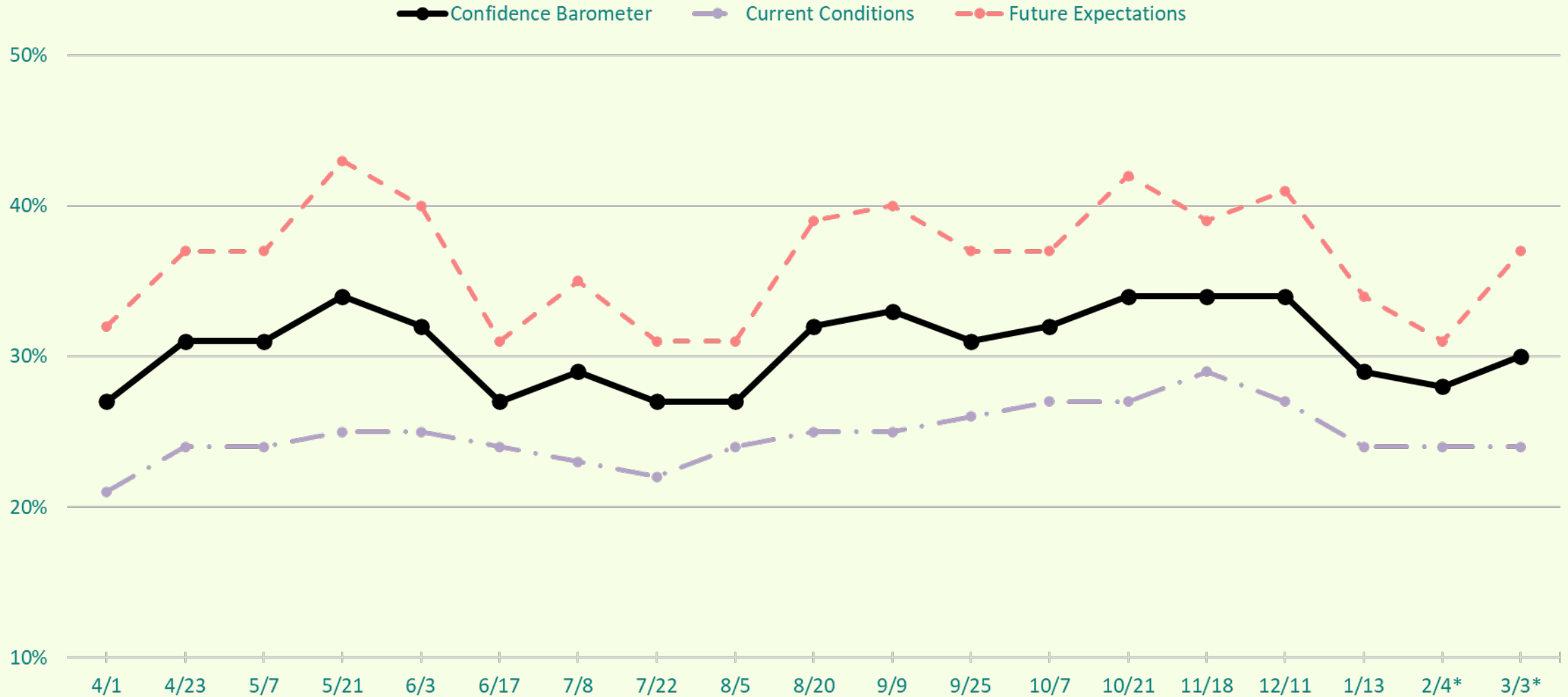
CATEGORY ENGAGEMENT OVER TIME*

*past 18 months

[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

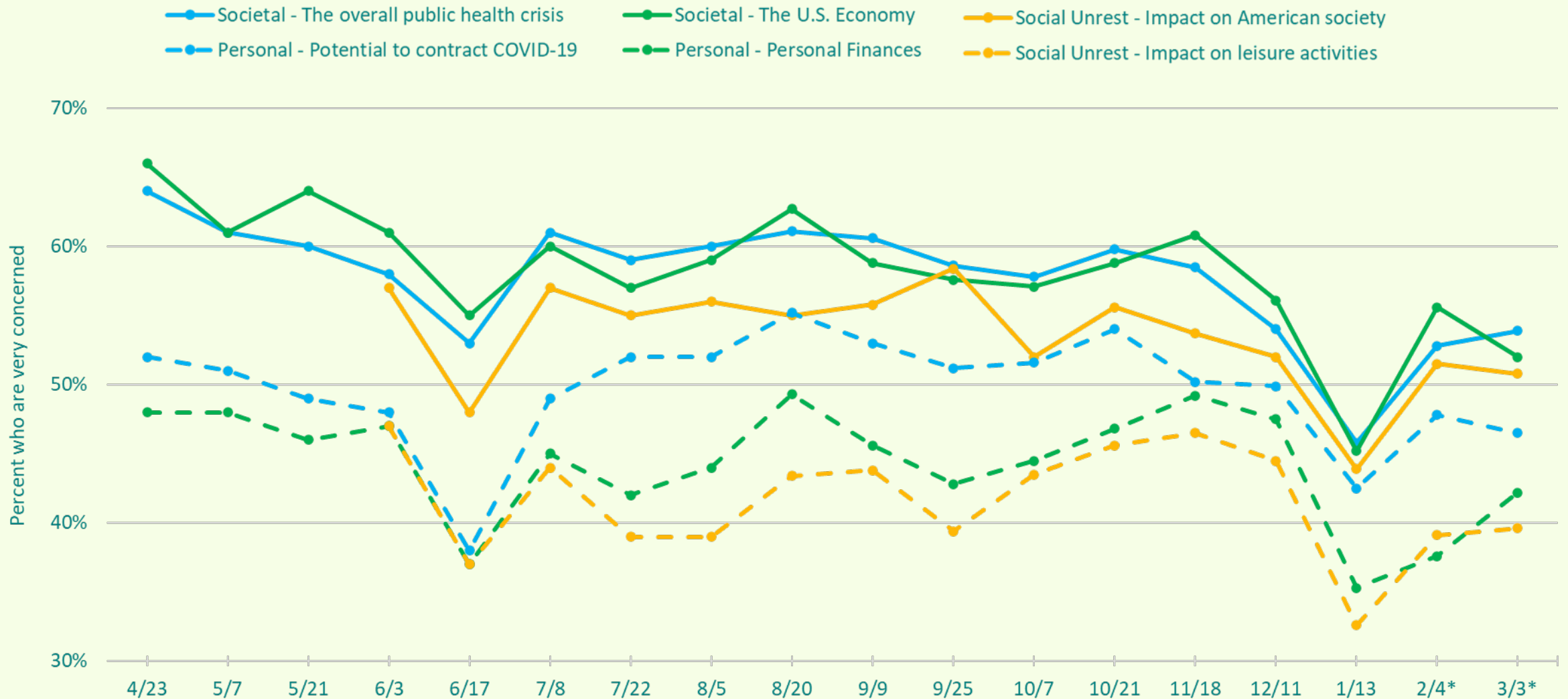


CONFIDENCE BAROMETER TICKS UP SLIGHTLY



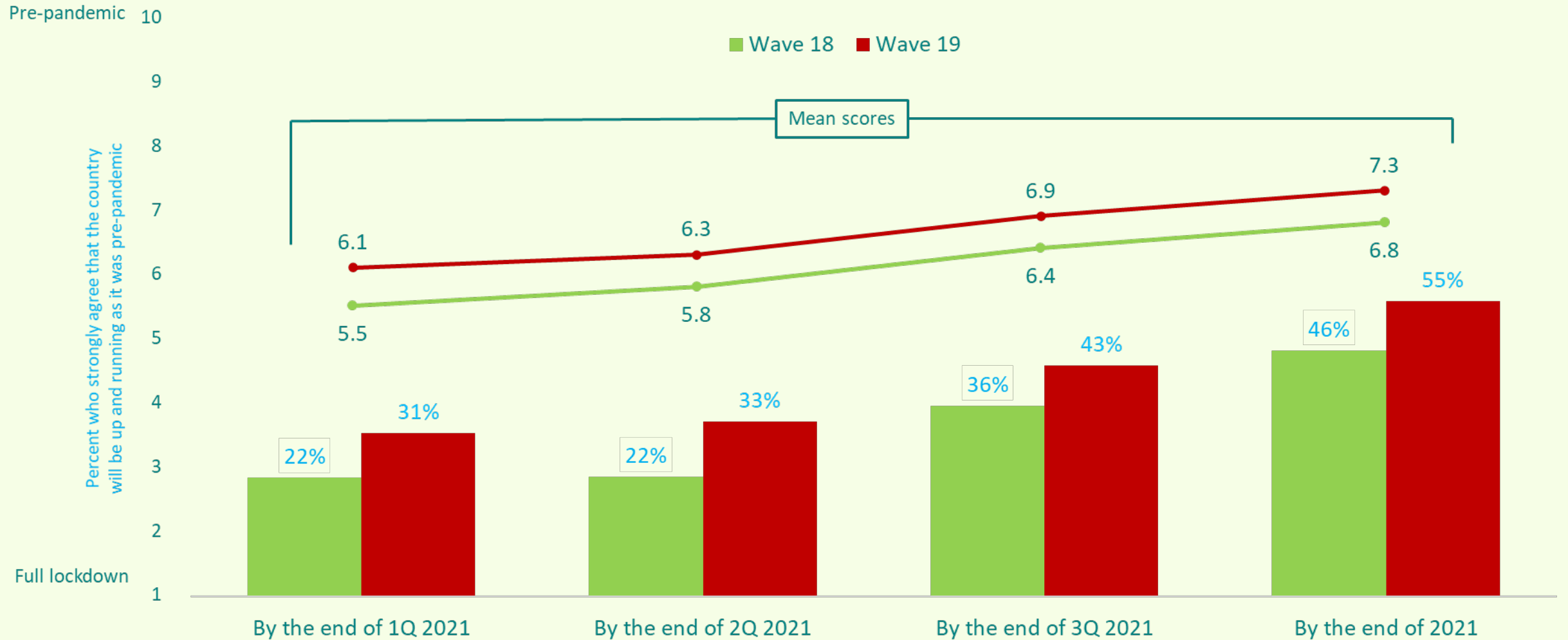
Back to Normal Barometer, Mar. 3, 2021; * = respondents active within last 18 months, not last 12 months

PERSONAL/SOCIETAL CONCERNS LEVEL OUT



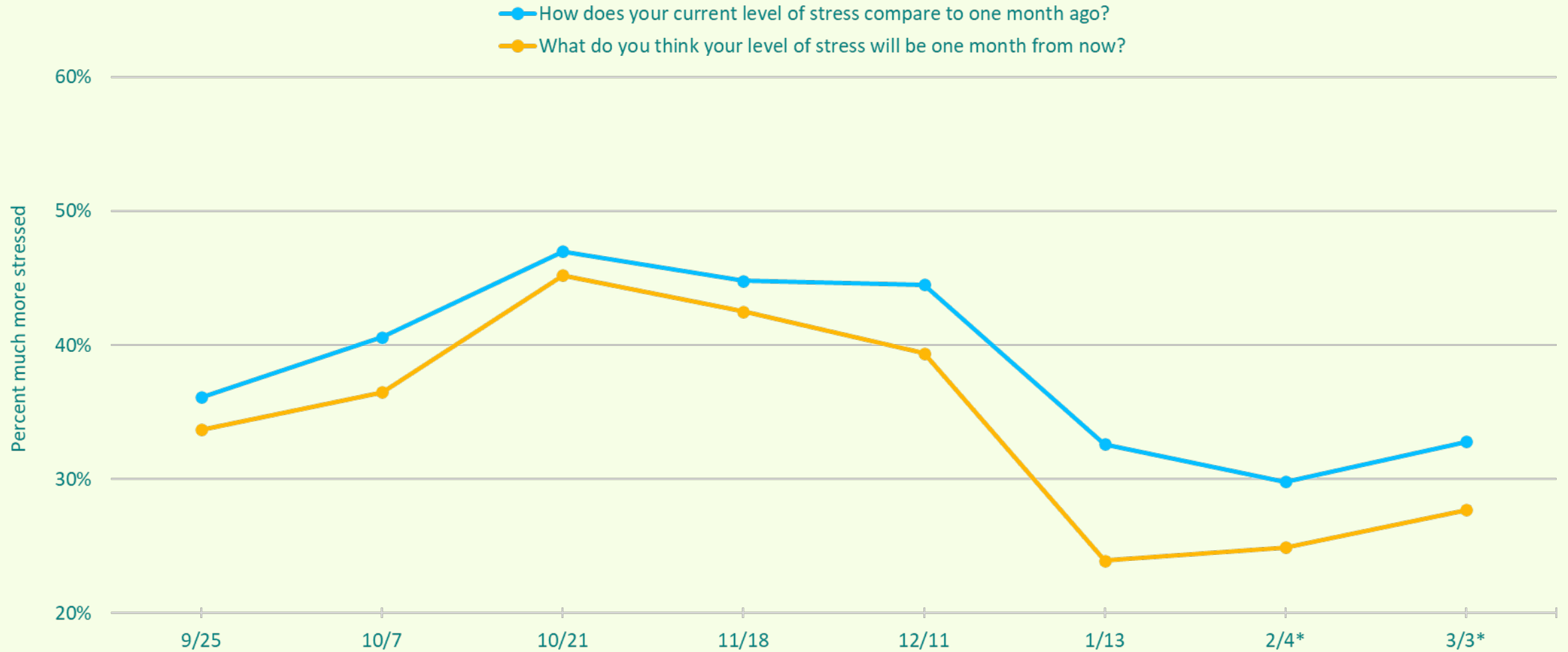
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HERE'S WHEN THEY THINK WE'LL BE UP AND RUNNING AGAIN



n=534, Feb. 4, 2021; n=512, Mar. 3, 2021

THE BACK-TO-NORMAL STRESS-METER TICKS UP SLIGHTLY

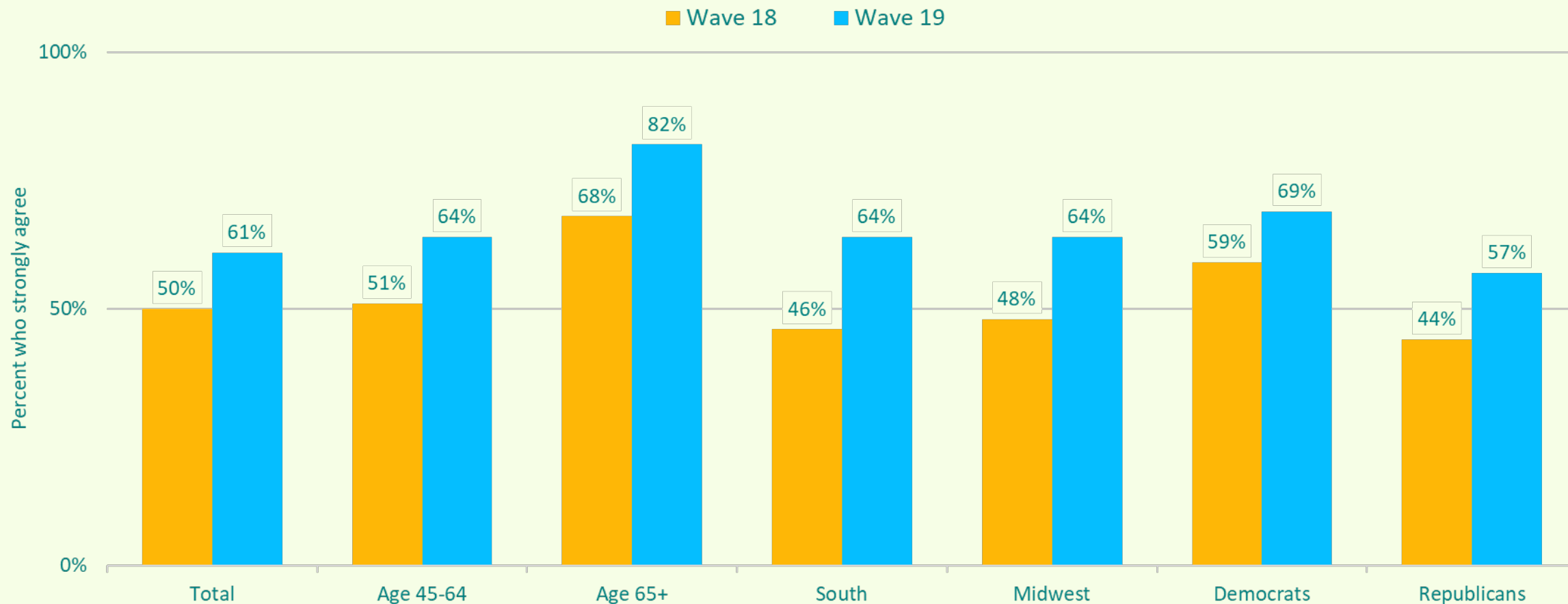


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COVID-19 & Vaccinations

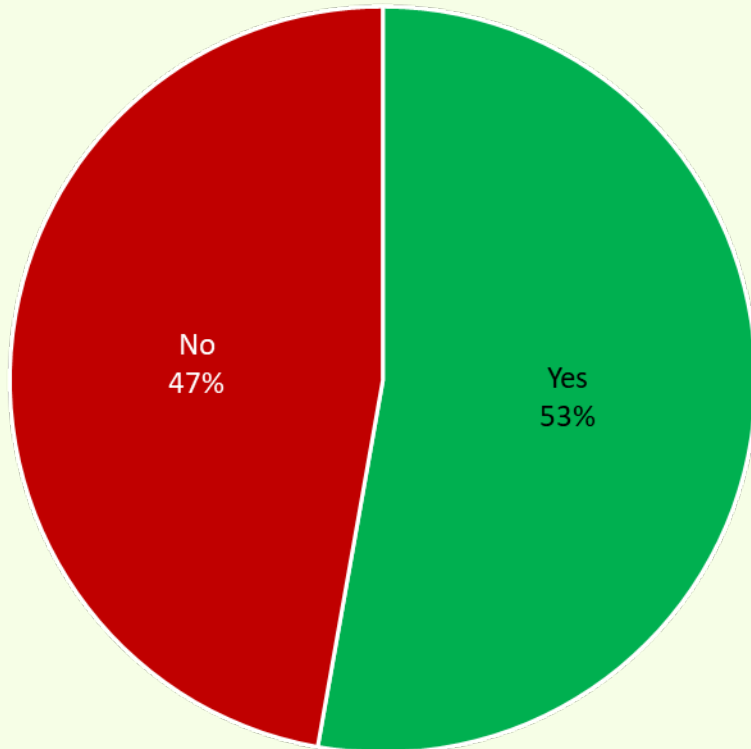
VACCINATION LIKELIHOOD JUMPS TO OVER 60%

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

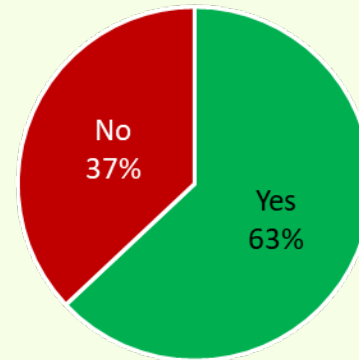


CREDIBLE INFO, OTHERS' EXPERIENCES DRIVING VACCINE INTEREST

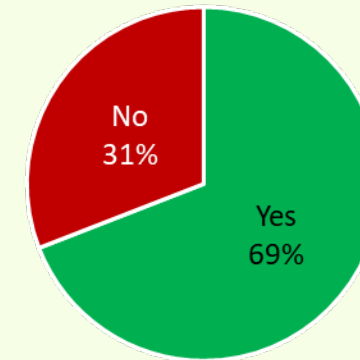
Have you sought out information about where you or a family member can get vaccinated for COVID-19?



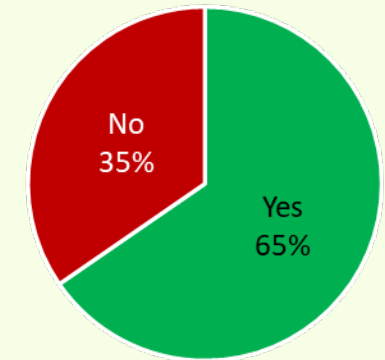
Past year travelers



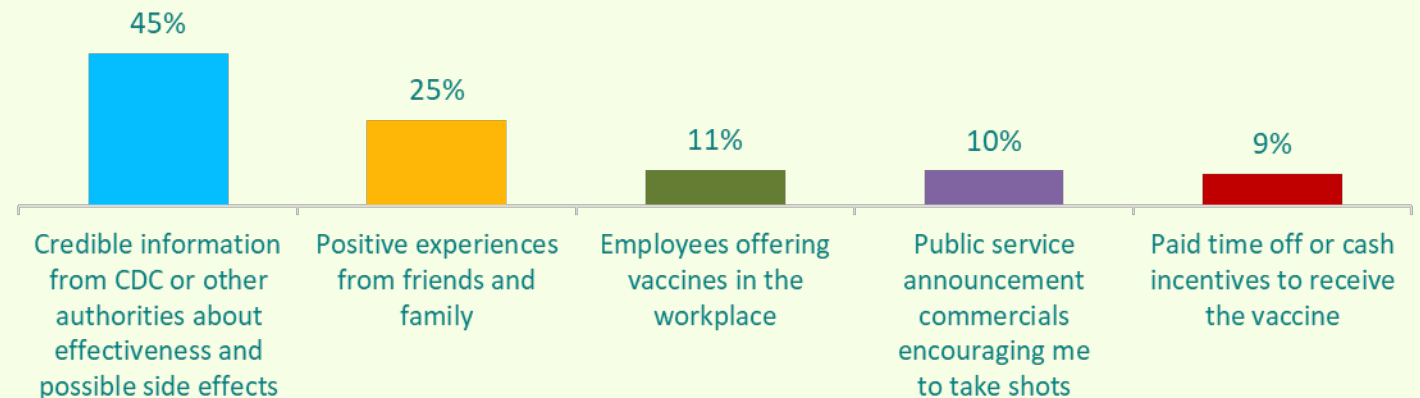
65+



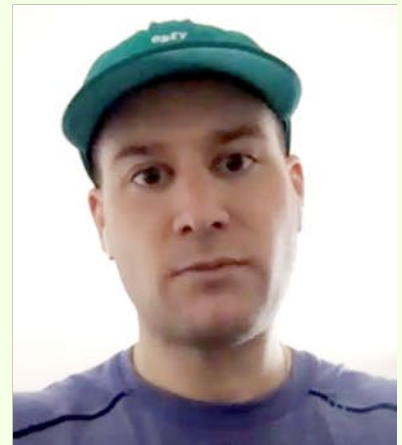
Western U.S.



[Among those not unlikely to get vaccinated:] What is or has been most instrumental in encouraging you to receive the COVID vaccine?



IN-DEPTH INTERVIEWS



WIDESPREAD VACCINE DISTRIBUTION COULD BE THE HOLY GRAIL



- Most see it as the best path to normalcy
- Once vaccinated, respondents feel relief and a sense of protection
- Most feel that once vaccines are available for all, restrictions for out of home gatherings should be lifted...but it isn't clear cut:
 - “All clear” may have to wait for “the science” and “the authorities”
 - Wait until Fall, to allow for stragglers and skeptics
 - Masks may never go away for many...particularly in close quarters and on public transportation
 - It should still be tied to how much virus is circulating in communities
 - 80% vaccinated seems to be the number people would be most comfortable with absent any other statistics

“You don't want government saying that you have to have a vaccine....I think the September time frame is a good buffer for people to figure out when and if they should get vaccinated.”

“I think the vaccine is the first step at getting things to the next level in terms of getting back to normal...but it's being portrayed as the magic pill. Just because you have a vaccine doesn't mean you are safe. We have to be compliant. When I see people without masks, I want to say something. They have to be personally responsible.”

FRUSTRATIONS CONTINUE OVER INCONSISTENT VACCINE ROLL-OUTS



- Most believe that private enterprise or a public/private partnership would have created greater efficiencies and brisker pace
- Highly uneven implementation across localities
- Stories about vaccine doses going to waste
- Particularly challenging for older adults
 - Scheduling and QR codes

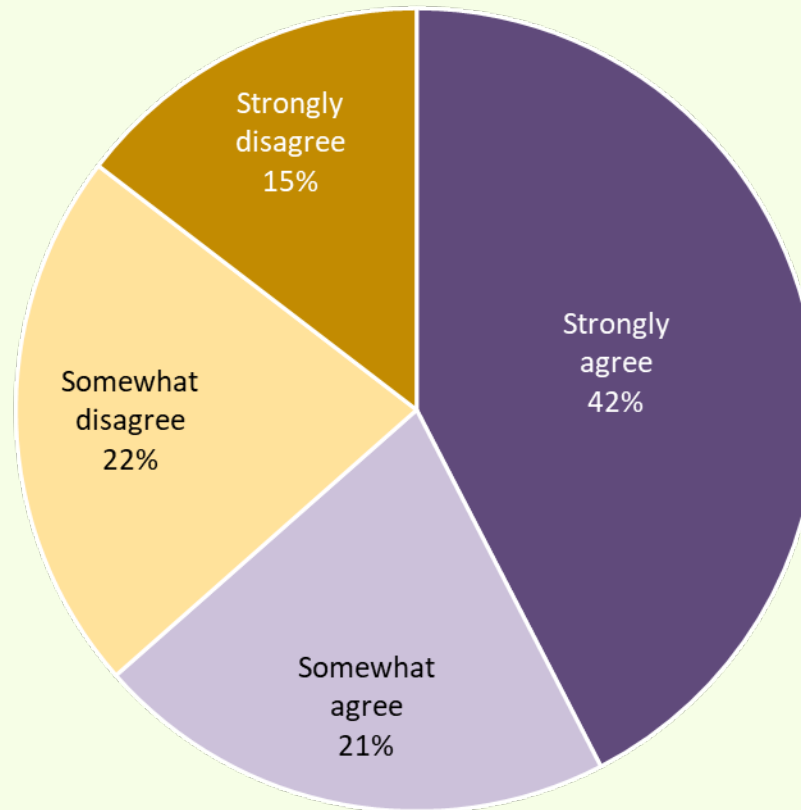
“Why can’t NY figure it out when other states have? Why doesn’t Duane Reade have it yet and why can’t I get into Javitz? How hard is it to is it to build a website?”

“I think they should have educated people a little more...to let people know more about it. It probably would be more effective with private enterprise doing it. There are so many people especially younger folks who don’t trust the government...”

“I know some people are unhappy with how our government has started rolling things out here. Because I think there was only four mass sites and like the whole state of Missouri.”

IMPLICATIONS FOR FULL AVAILABILITY OF VACCINES

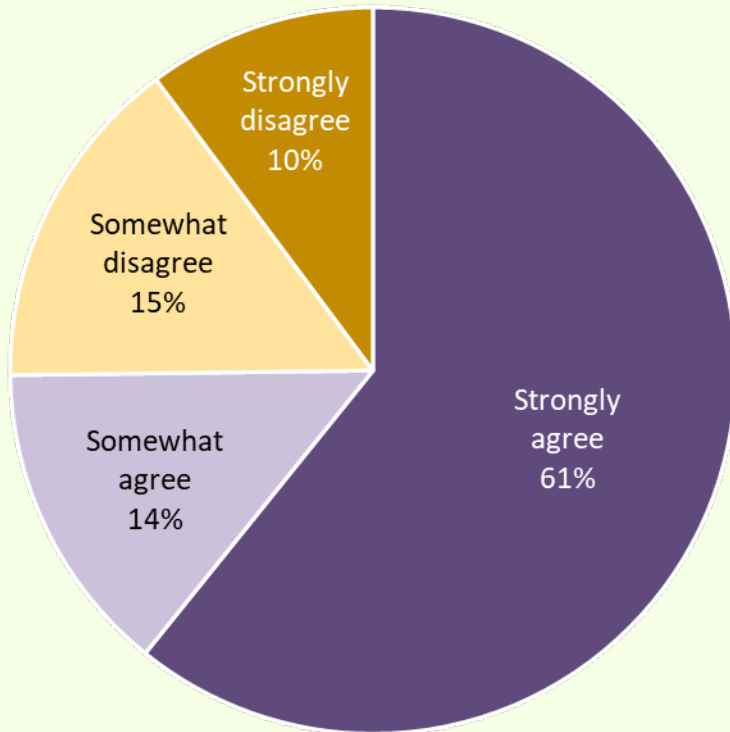
Once COVID-19 vaccines are available for all who want one, it will no longer be appropriate for the government to dictate the size of gatherings outside the home.



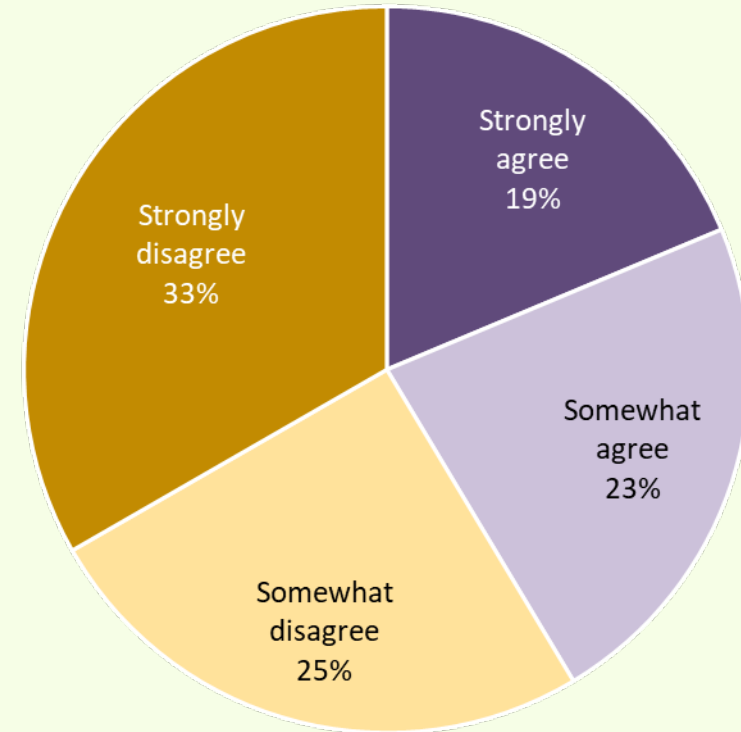
IMPLICATIONS FOR FULL AVAILABILITY OF VACCINES

Once the COVID-19 vaccine is widely available, I'll be comfortable requiring customers to show proof of vaccination to participate in certain activities, such as flying, attending a sporting event, or going to the movies.

Among Those Likely to be Vaccinated



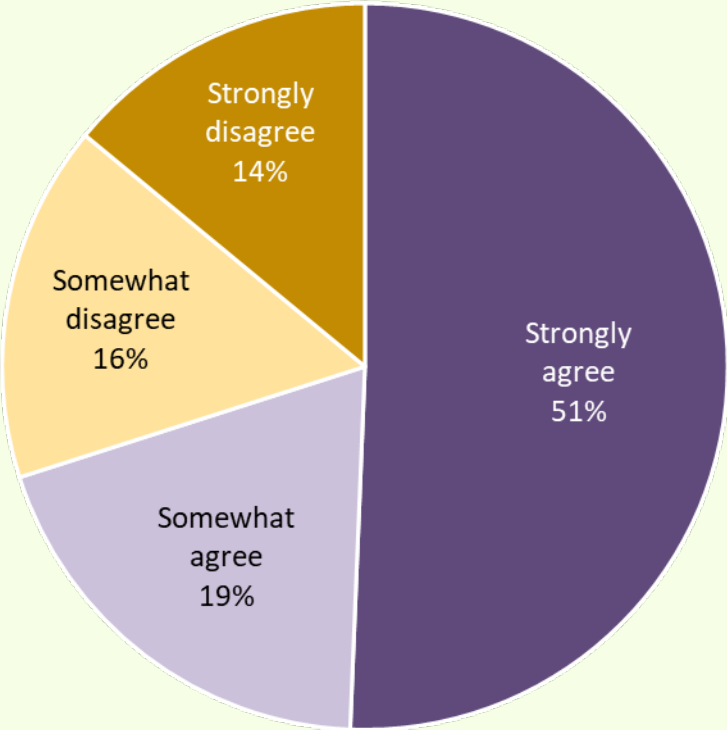
Among Those Not Likely to be Vaccinated



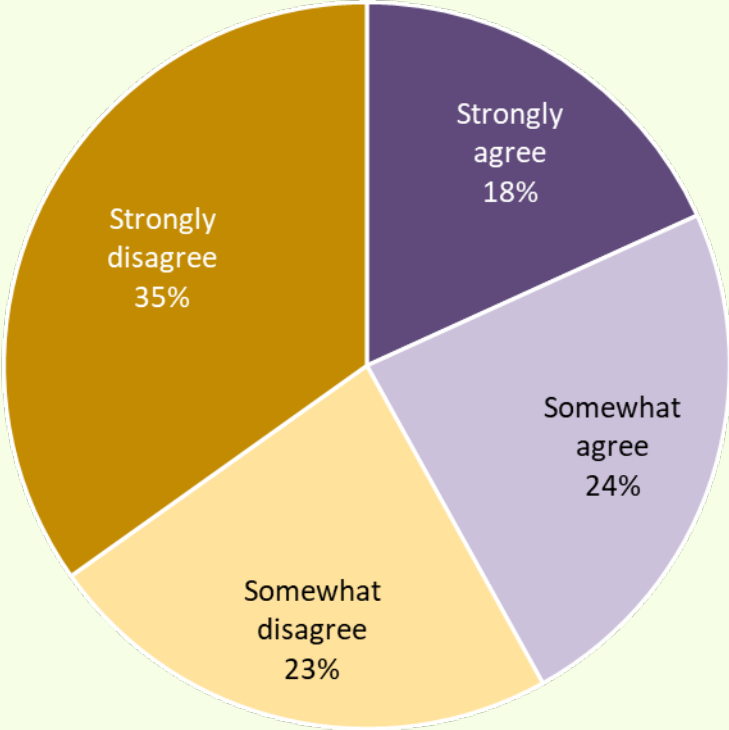
IMPLICATIONS FOR FULL AVAILABILITY OF VACCINES

Once the COVID-19 vaccine is widely available, I'll be comfortable barring non-vaccinated people from participating in certain activities, such as flying, attending a sporting event, or going to the movies.

Among Those Likely to be Vaccinated



Among Those Not Likely to be Vaccinated



THE “COVID PASSPORT” IS A PALATABLE CONCEPT



- Like a driver’s license
- Sporting Events are already implementing a similar system
- Colleges have been implementing frequent testing
- Little remorse for those who aren’t willing to play by these rules
 - Though some question willingness/widespread adoption given inconvenience and personal privacy concerns

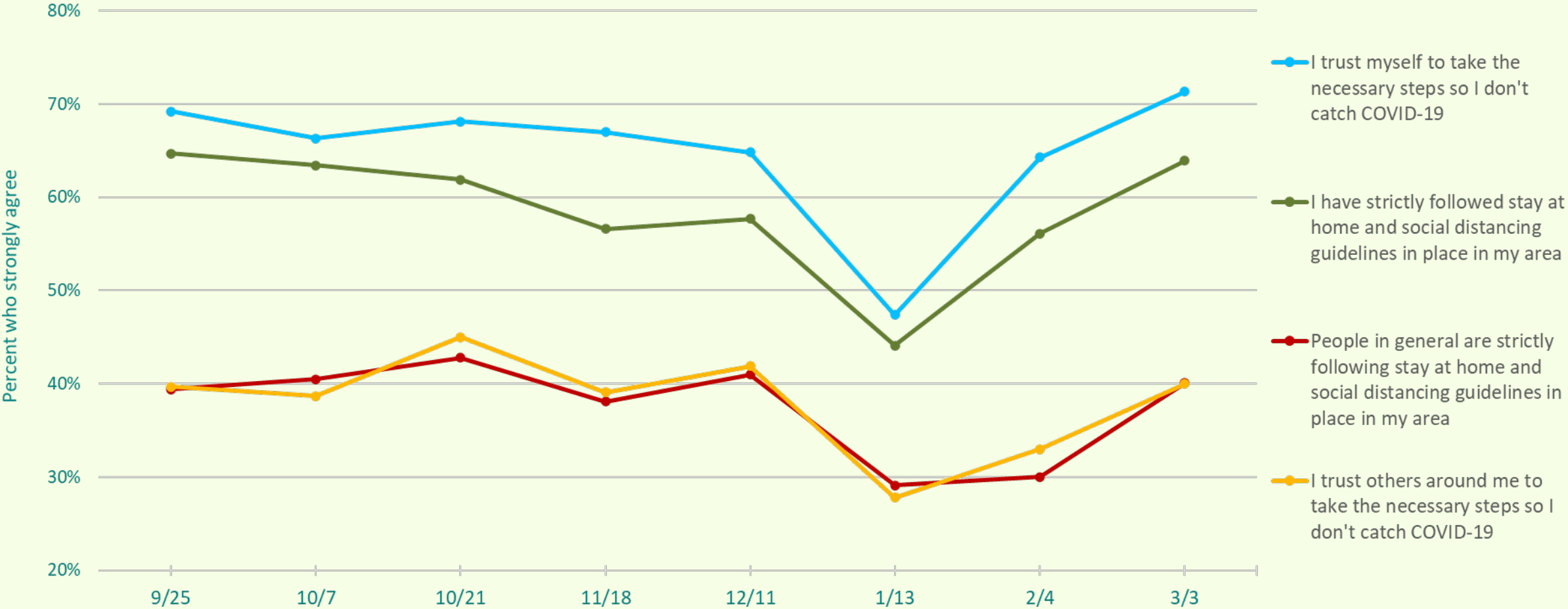
“If people don’t want it. They don’t have to go.”

“It’s our new normal and only way that people feel there is some form of control in keeping this at bay. Here’s your card, just like other immunizations at school. It’s conservative but that’s where I think people would feel most comfortable moving forward.”

“That’s a good idea. I get on a plane, I want to be sure that everybody else on that plane is clean like me.”

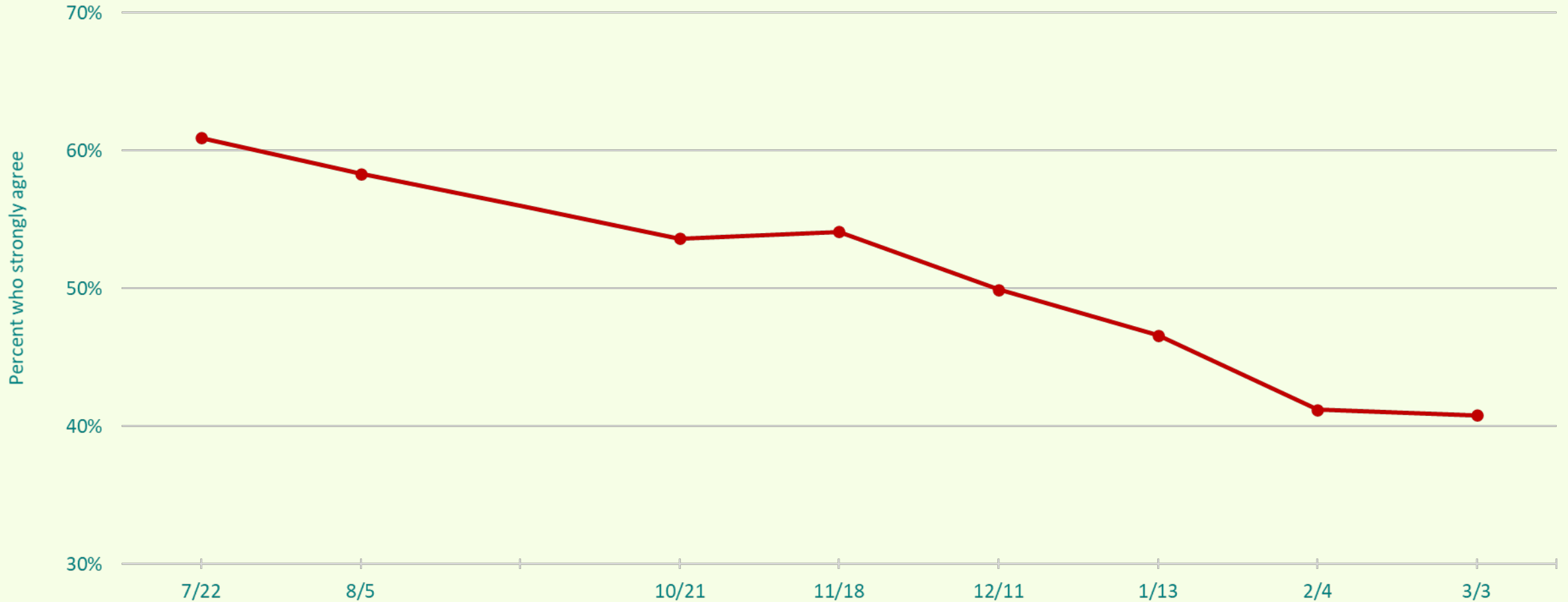
“People have no problem with “NO shirt no shoes no service”... “No proof, no entry” should be the same.”

PERCEIVED COMPLIANCE OF COVID-19 GUIDELINES BUILDS



RE-CLOSING IS CLEARLY LESS OF AN OPTION

I believe that areas of the country with high rates of COVID-19 should be re-closed.



Revolutionizing the workplace

BACK TO THE OFFICE IS INEVITABLE TO SOME EXTENT



...BUT NOT NECESSARILY INEVITABLY DIFFERENT:

- Several already back or never left
 - It remains about “controlling” the environment, with the typical protocols
- However a portion remain enamored with the flexibility and work/life balance afforded by WFH
- Larger workspaces to allow greater social distancing???

“I think for face-to-face work purposes, definitely meeting with clients, that social interaction—especially if you're trying to close on a deal—there is nothing like that personal interaction...over a cocktail, or over a meal, or something like that.”

MIXED THOUGHTS ABOUT THE FUTURE OF ZOOM AND ITS COMPETITORS



- ZOOM is best of breed
 - Teams does not allow simultaneous participant view and screen share
 - ZOOM is easy to use, even for the technologically deficient
- But it is a complement rather than a substitute
 - Nothing like human interaction and connection
 - Handshakes and hugs
 - Reading the room
 - Could expand the audience for live theater!

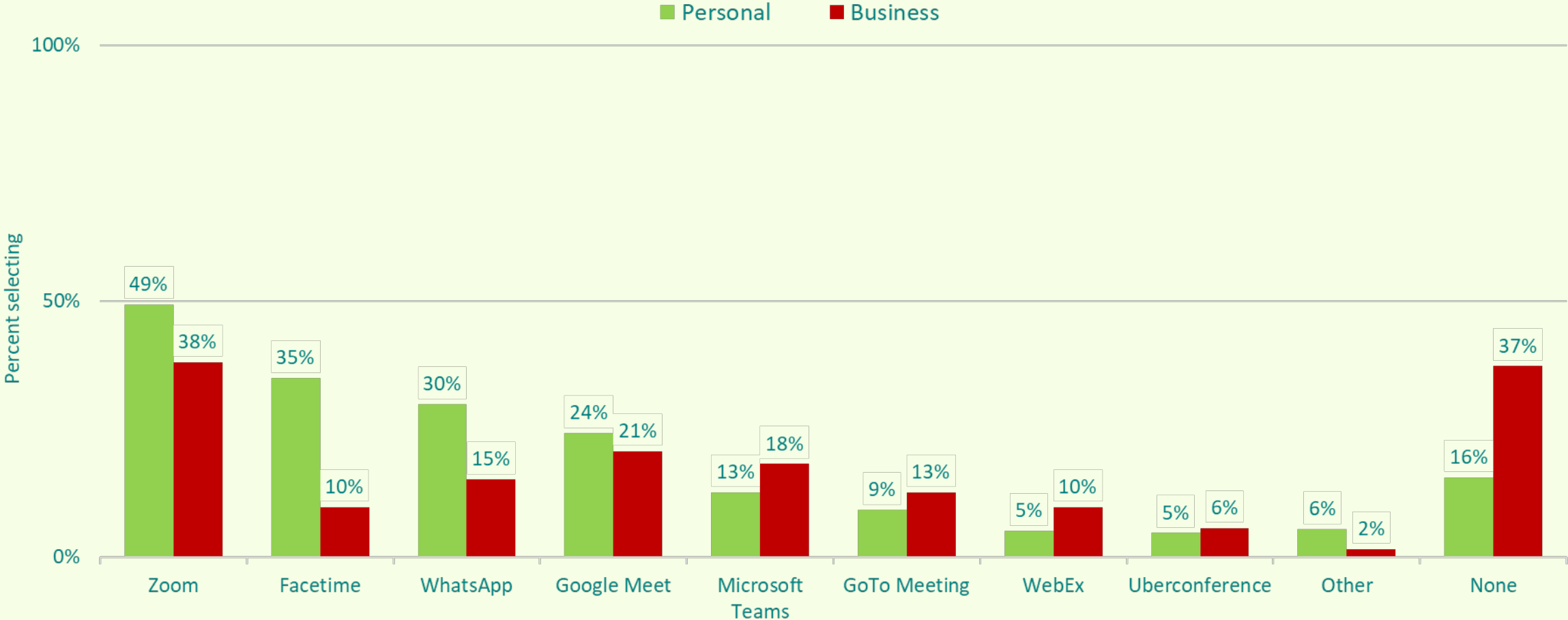
“I think it’s going to stay to a point. People [are] getting more comfortable and don’t have to travel. It will be a lot more popular than before, but people will go back face-to-face.”

“I honestly feel that in-person meetings are going to be 10-20%, and everything else will be virtual. I don’t see people sitting around a conference table, and that’s pretty sad.”

“It’s not as good as in person, but it’s real close.”

HALF HAVE USED ZOOM; OTHER PLATFORMS SEE LOWER %

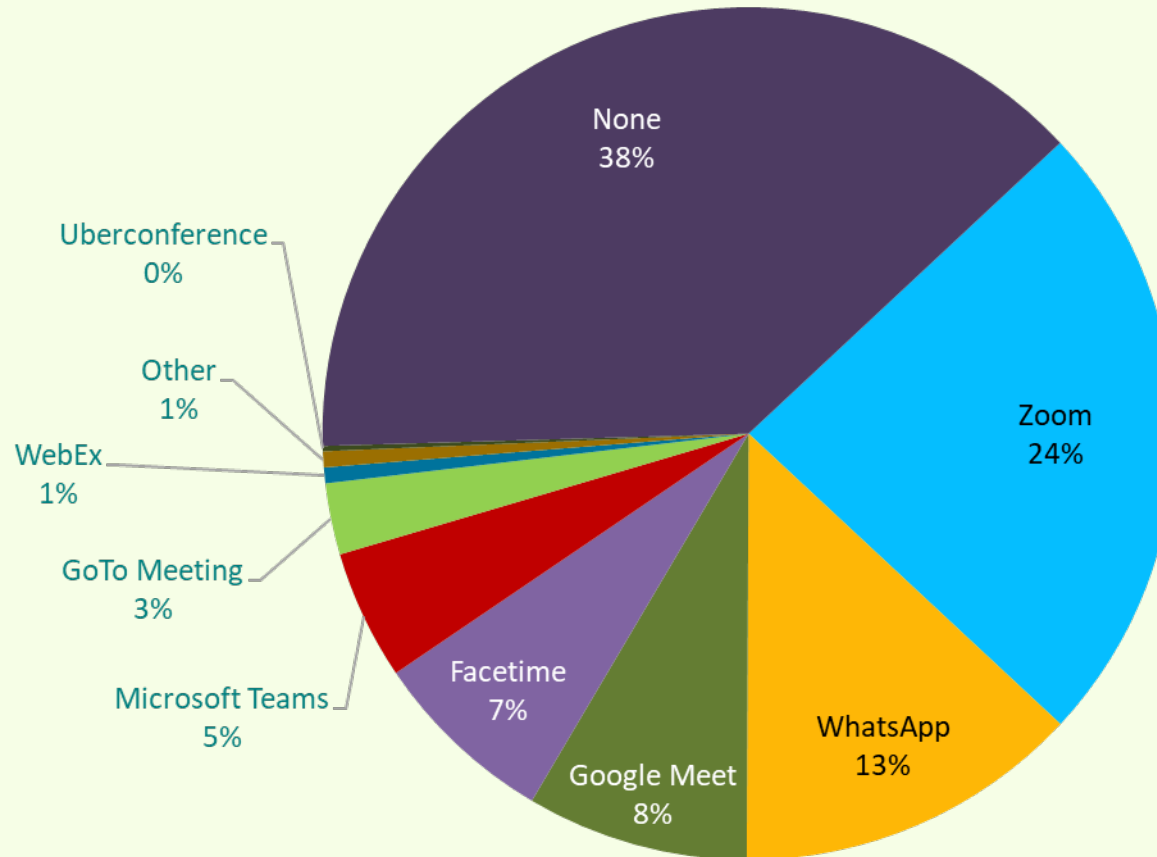
Which of the following online platforms have you used for both personal and business meetings and/or communication?



n=512, Back to Normal Barometer, Mar. 3, 2021

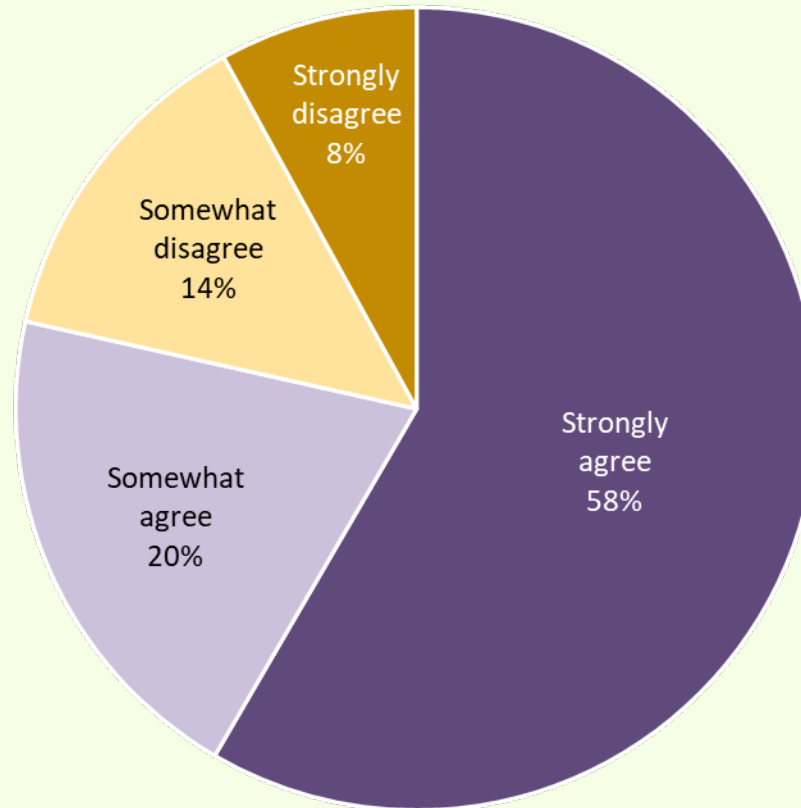
1/4 SAY THEY USE ZOOM THE MOST; >1/3 DON'T USE ANY

Which do you use the most?



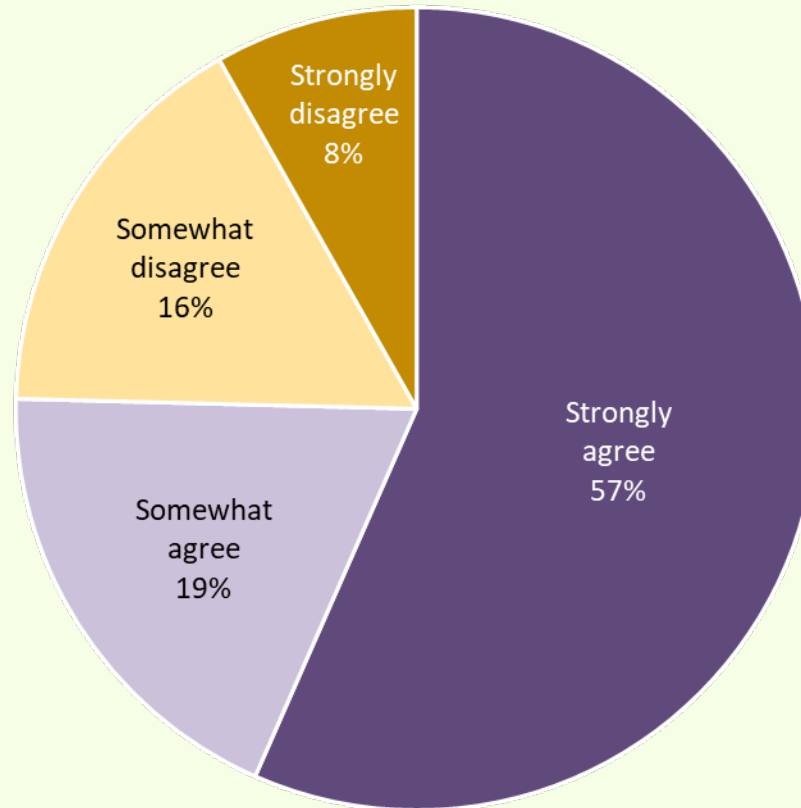
MOST AGREE VIRTUAL PLATFORMS GREAT FOR KEEPING IN TOUCH

Virtual platforms are an excellent way of keeping in touch with friends and family.



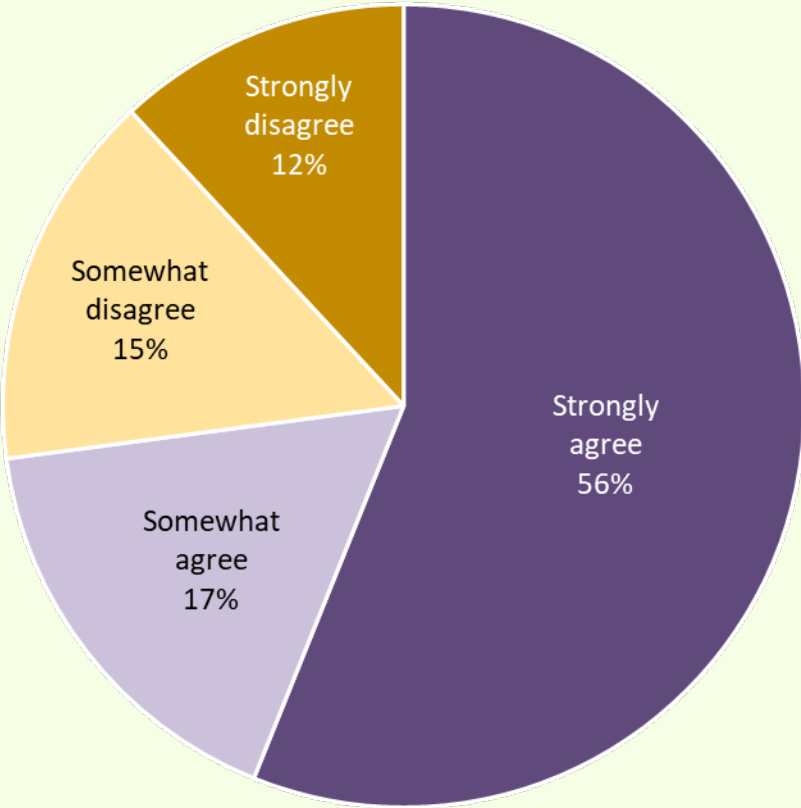
MOST AGREE VIRTUAL PLATFORMS GREAT FOR KEEPING IN TOUCH

Virtual platforms are an excellent way of keeping in touch with business colleagues.



MOST LOOK FORWARD TO RETURNING TO FACE-TO-FACE

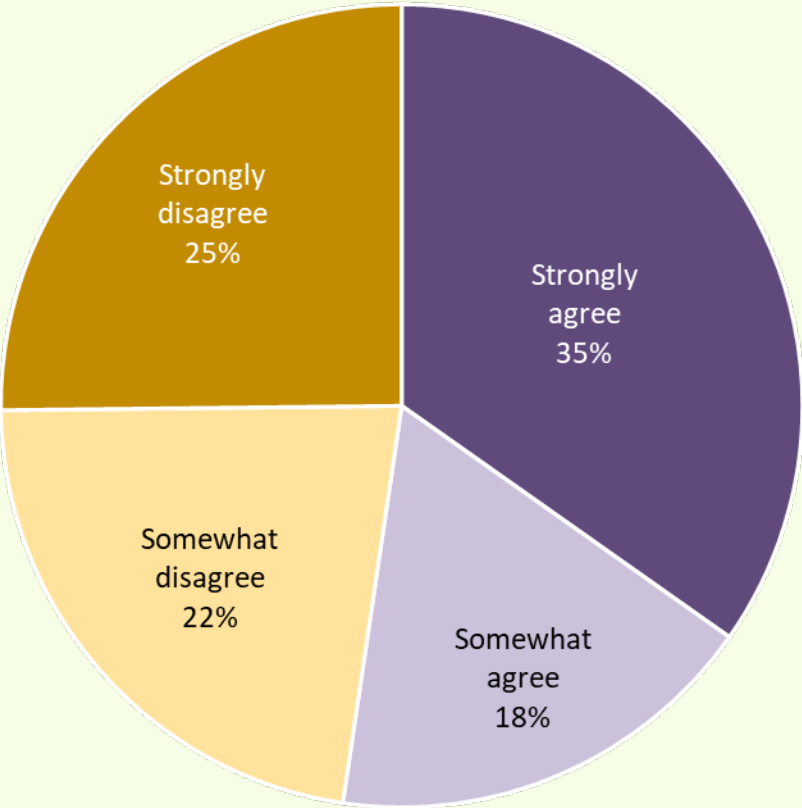
While I use virtual platforms out of necessity for work, I look forward to getting back to face-to-face interactions.



n=512, Back to Normal Barometer, Mar. 3, 2021

MAJORITY SAY ABSENCE OF FACE-TO-FACE HARMED INDUSTRY

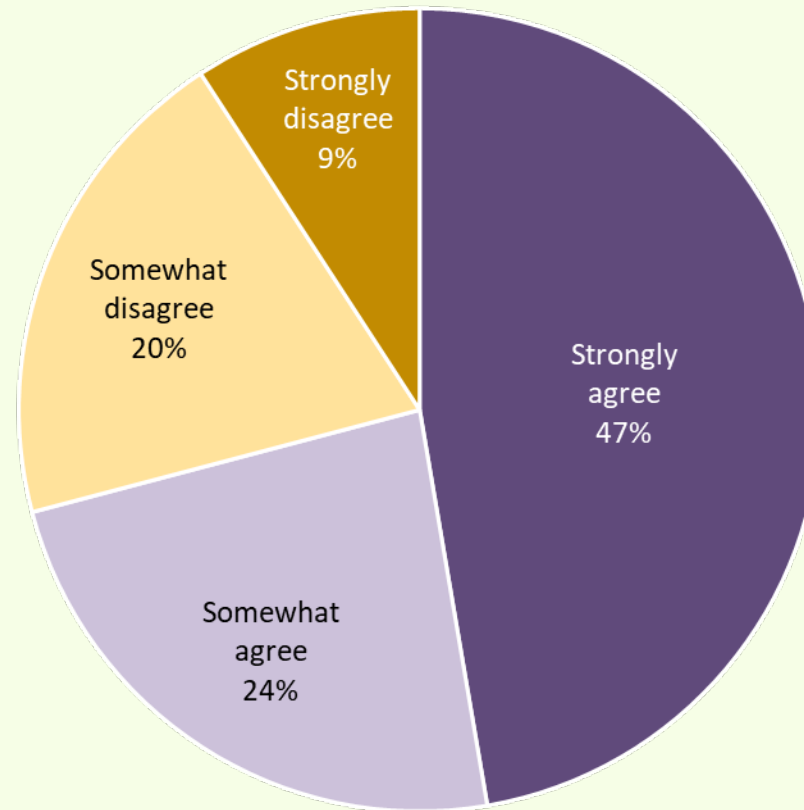
The lack of face-to-face interactions has adversely impacted my profession/industry.



n=512, Back to Normal Barometer, Mar. 3, 2021

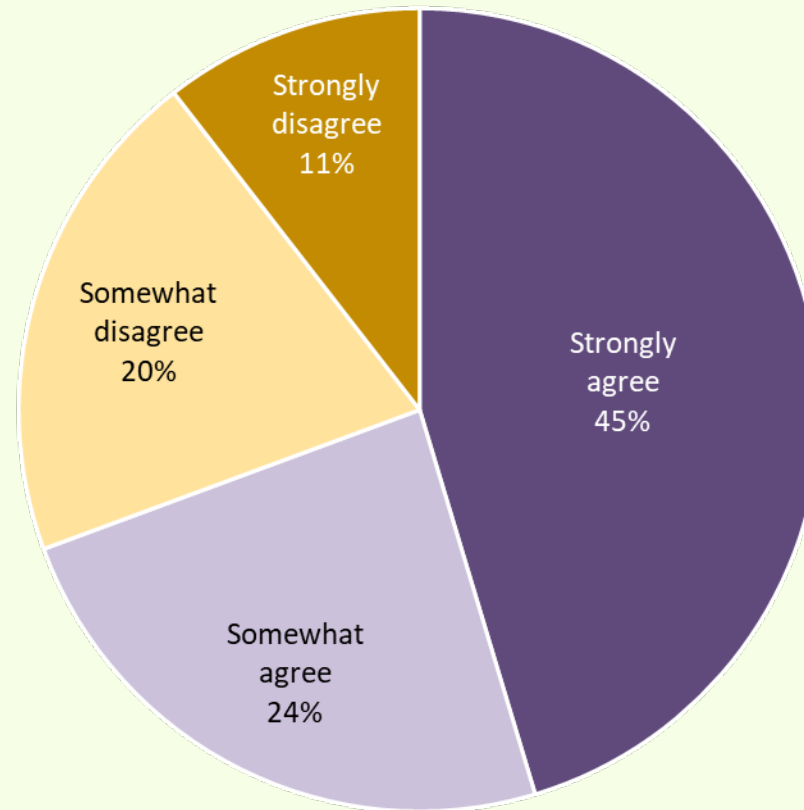
71% AGREE VIRTUAL PLATFORMS HAVE BOOSTED PRODUCTIVITY

Virtual platforms are critical tools that have increased business productivity since the pandemic.



7 IN 10 SAY VIRTUAL PLATFORMS MAKE BIZ TRAVEL LESS VITAL

Virtual platforms will make business travel less important after the pandemic is over.



WHAT PEOPLE ARE MISSING



- All have resumed most major activities
- Outdoor activities, home improvement projects and exercise have been critically important
- Where they once needed time for leisure activities, now they need activities for their time
- “Social” Gaps:
 - International Travel
 - Concerts and shows
 - “Crowded Bars”
 - Large family gatherings and kids’ parties
 - Sporting events
- People are tired of living in fear
 - Greater information creates comfort
 - Positive downward trends in virus spread and seriousness
- There are signs of people “turning the corner”

“It was a build-up of ‘I can’t possibly continue to do this without driving myself crazy.’”

“The ways that I connect with people has been stripped...and people are nervous. I feel this big empty piece of my heart... I need to find other ways to fulfill me, and fill myself up.”

“I went to Chicago for Martin Luther King weekend, and when I tell you the difference, I was surprised ... we're eating outside in the cold. Nothing's really open. Chicago's way more strict about COVID. I really didn't get to enjoy the city, and I was honestly surprised, and I was grateful to live in Texas.”

“Everyone has become more internalized in a bad way.”

“It's been hard for people to be able to get together, whether it's over a meal or coffee, a glass of wine, being able to see your friends and family.”

BOTH SPRING CANCELLATIONS AND GRADUAL RE-OPENINGS OF SPORTS WERE CORRECT AT THEIR RESPECTIVE TIMES



- We know more now
- Time was needed to test protocols
- Learning from the bubbles
- The need for sports to help relieve stress

But some still stew over perceived overreaction...

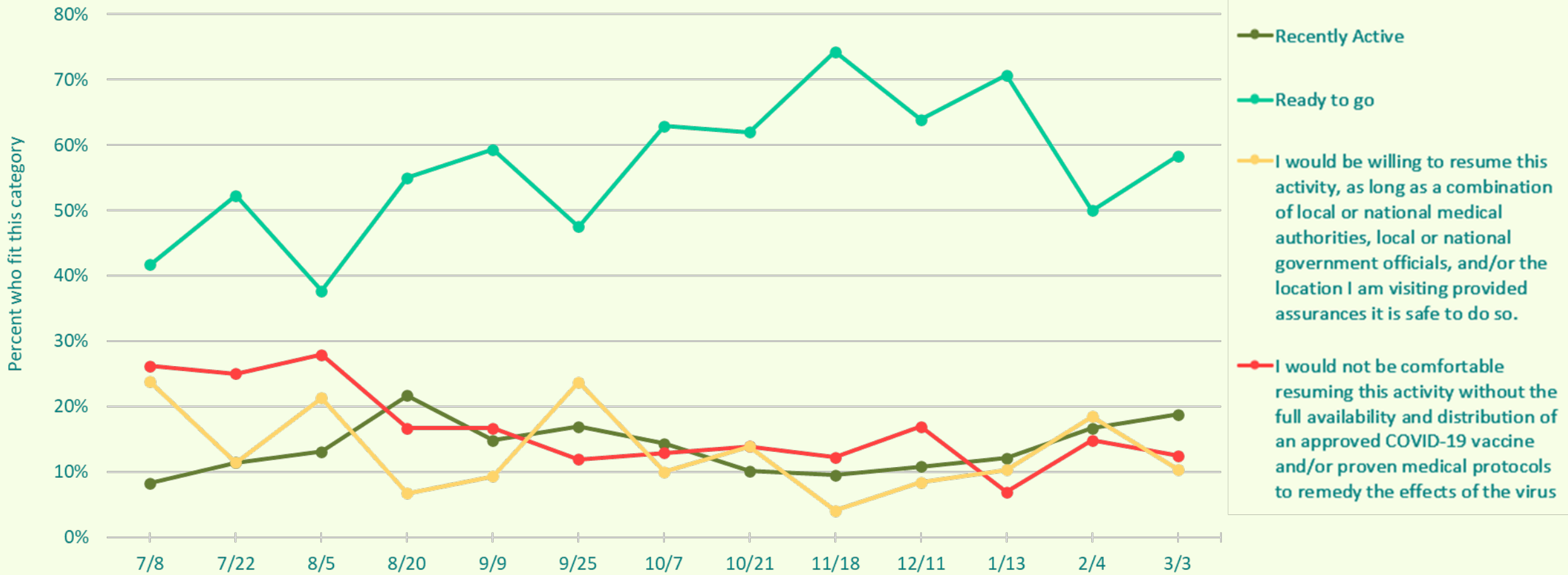
“I think the whole premise was in response to panic...and they seized everything. There’s so much contradiction.”

“Well, I think that with all the stress of being locked down and people being restricted from their livelihoods, it starts to create sort of depression almost. And I think that it's good to have things like sporting events which people hold very dear.”

Ready or Not

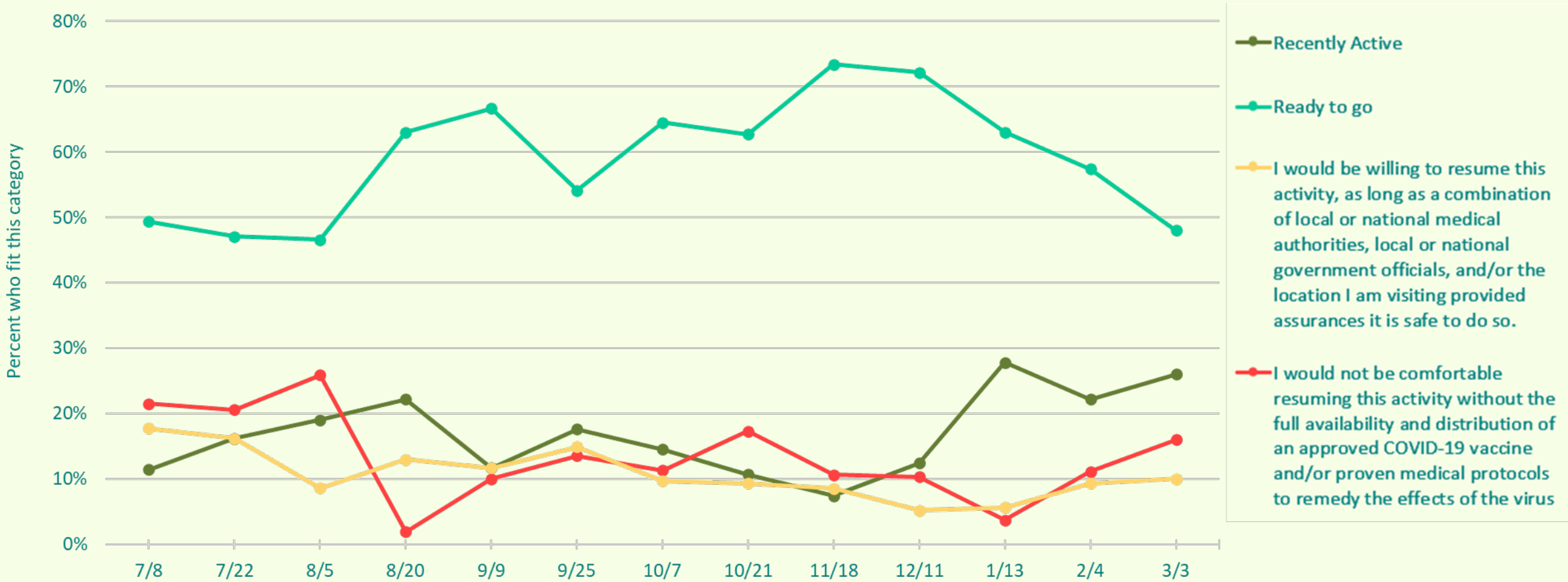
OPEN HOUSES: “READY-TO-GO” % TICKS BACK UP

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



TOURING A HOME: “READY-TO-GO” % CONTINUES TO SLIDE

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

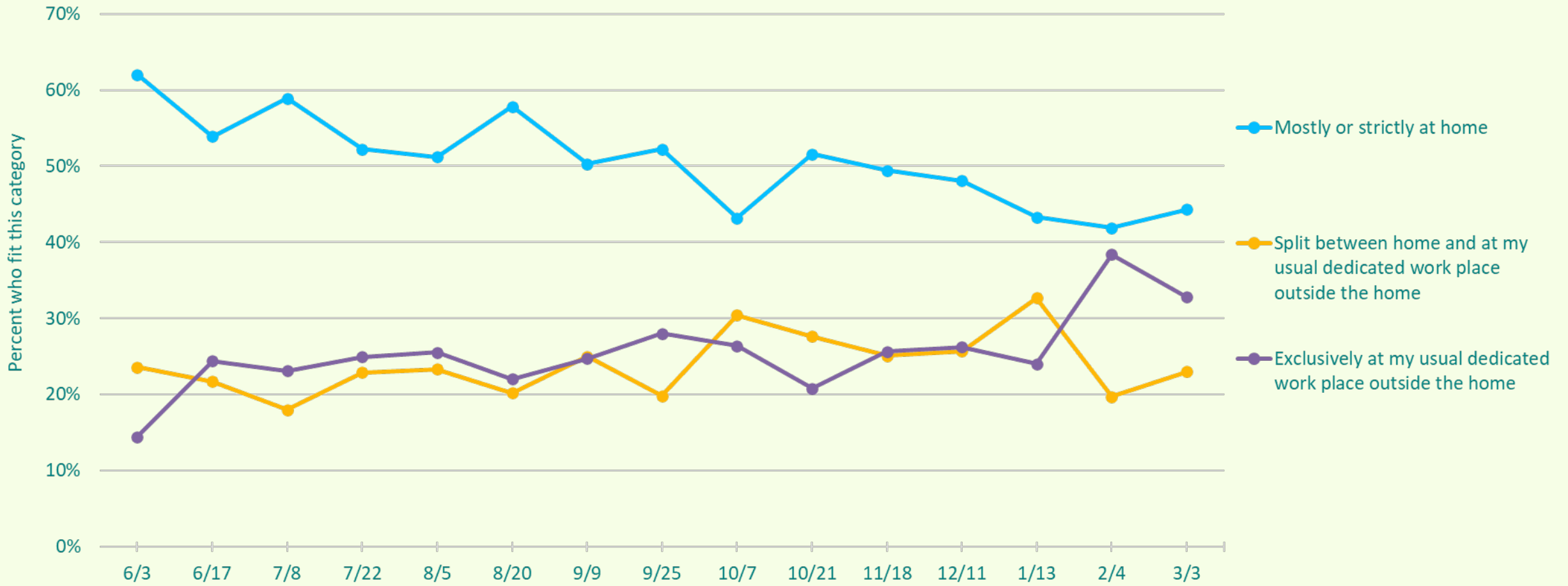


NAR



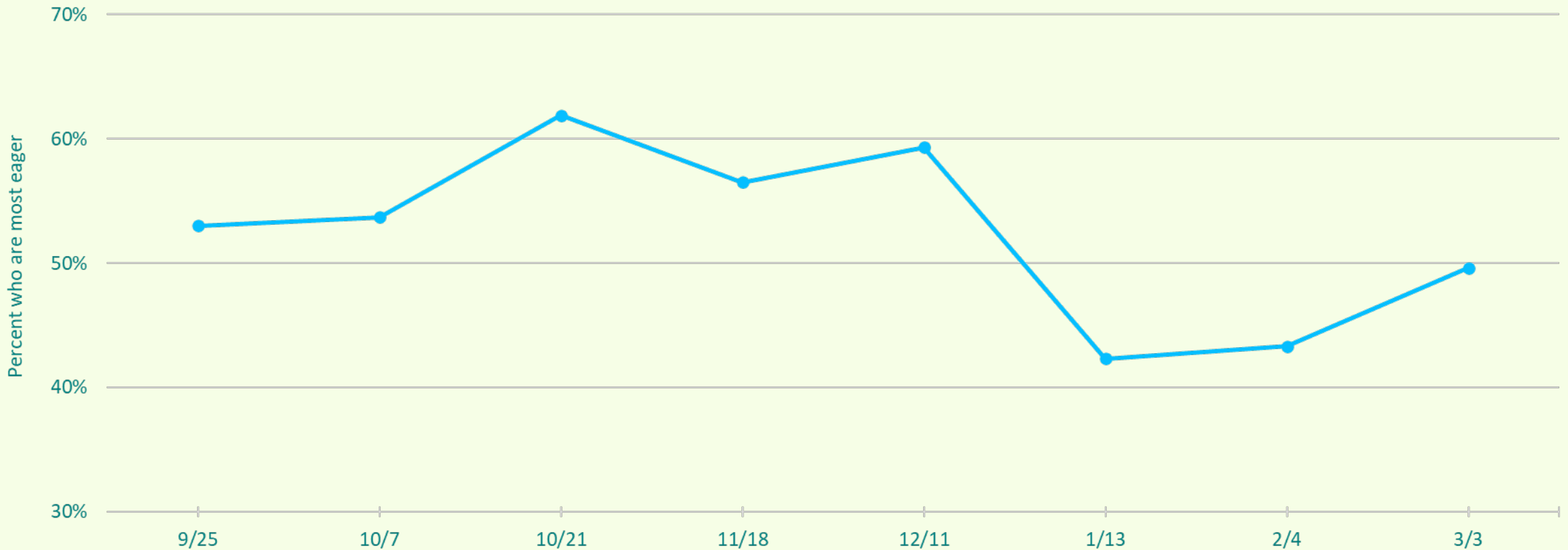
INCREASING % WORKING OUTSIDE THE HOME

Are you presently working from home or a dedicated workplace?



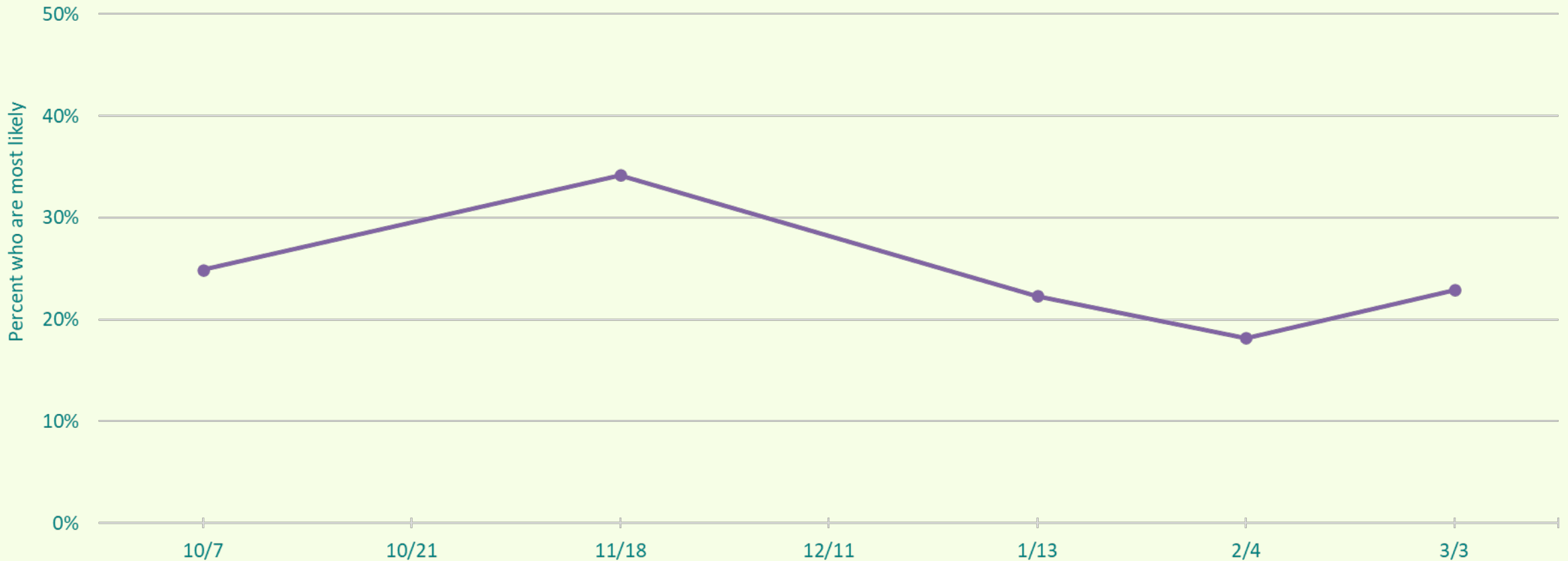
EAGERNESS TO WORK OUTSIDE THE HOME IS RISING AGAIN

[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?



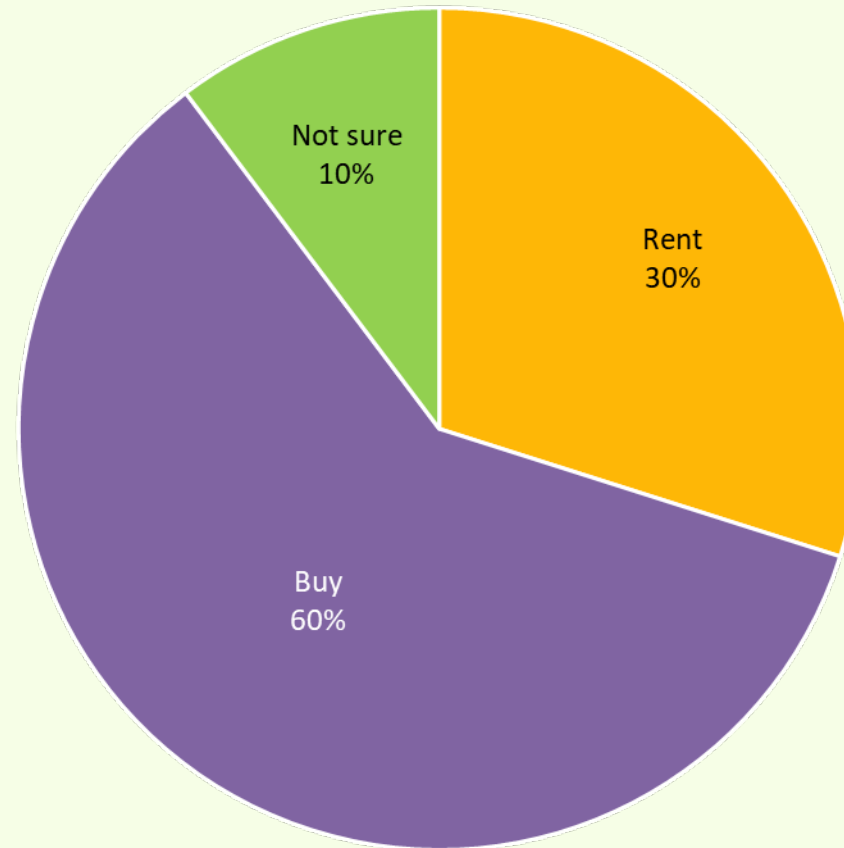
LIKELIHOOD TO RELOCATE REMAINS NEARLY FLAT SINCE JANUARY

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



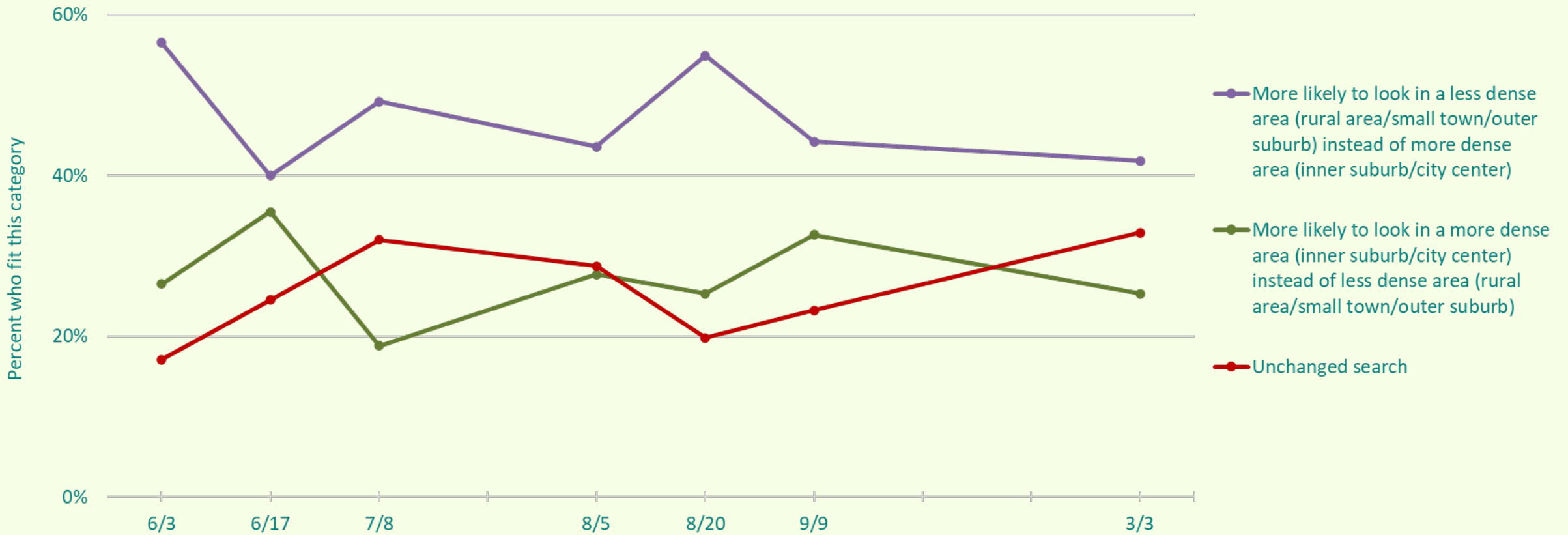
AMONG THOSE PLANNING TO RELOCATE, 3/5 PLAN TO BUY

[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...



PLURALITY EXPECTING TO LOOK IN LESS-DENSE AREAS

[Among those who will definitely relocate, or move to a location more than 50 miles from their present residence over the next six months and are planning to buy:] As you re-enter the home buying market, how, if at all, are you expecting your search location to change?



QUESTIONS

- What questions do you have for us?
- What would you like to ask in Wave 20?



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