

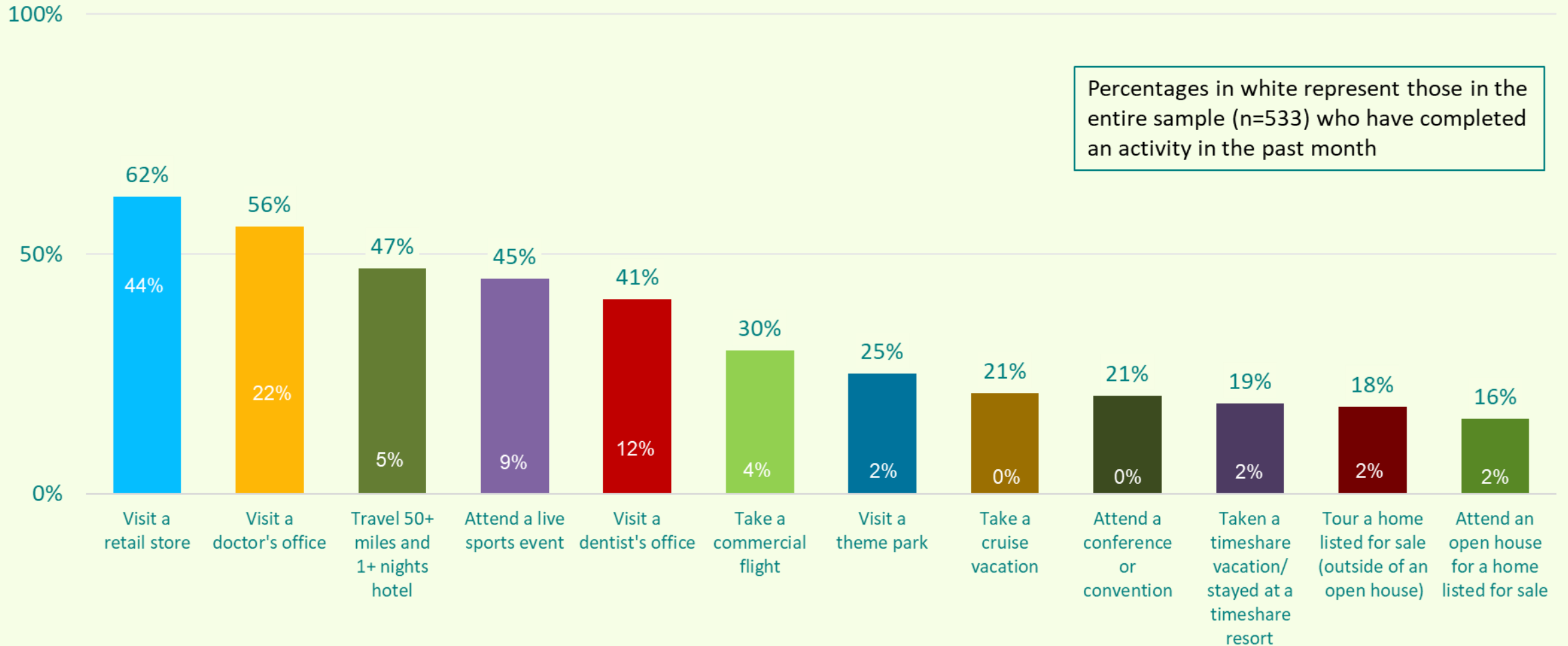
WAVE 16: UNDERSTANDING THE UNDAUNTED

Public opinion insights from the Dec. 11, 2020 “Back-to-Normal Barometer”

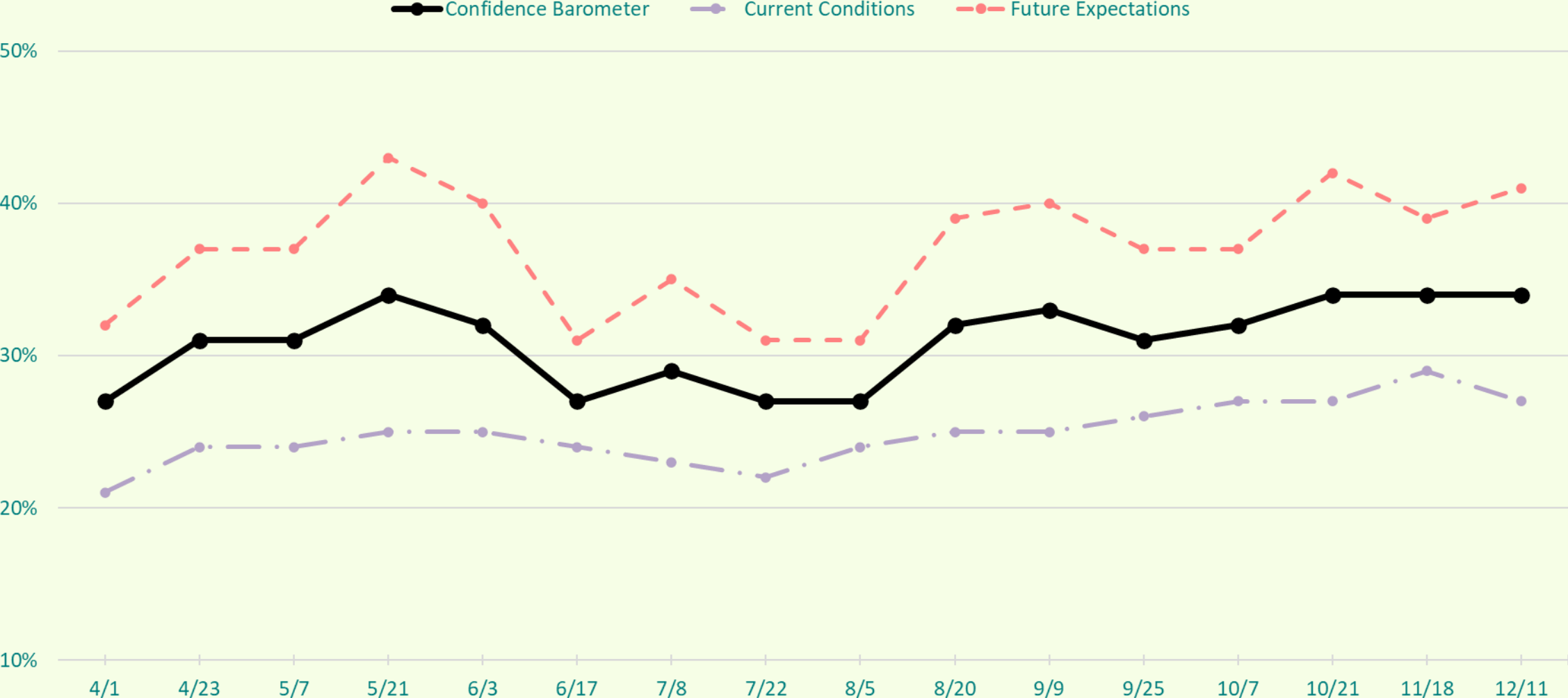
Ron Bonjean, Partner, ROKK Solutions
Rich Thau, President of Engagious
Jon Last, President of Sports & Leisure Research Group
Matt Steffee, Senior Research Analyst, Engagious

CONTEXT: RESPONDENTS ACTIVELY ENGAGE

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

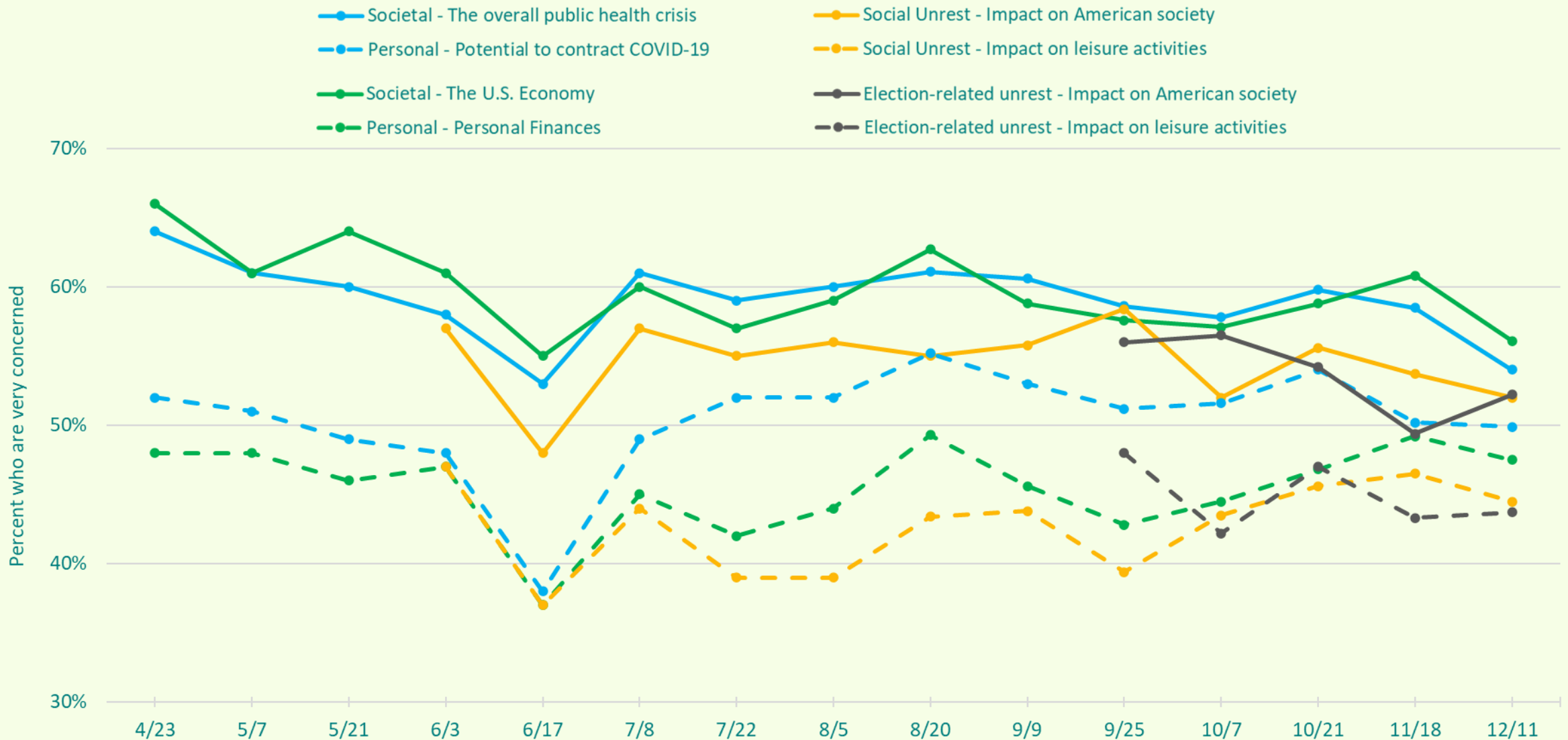


CONFIDENCE BAROMETER REMAINS FLAT



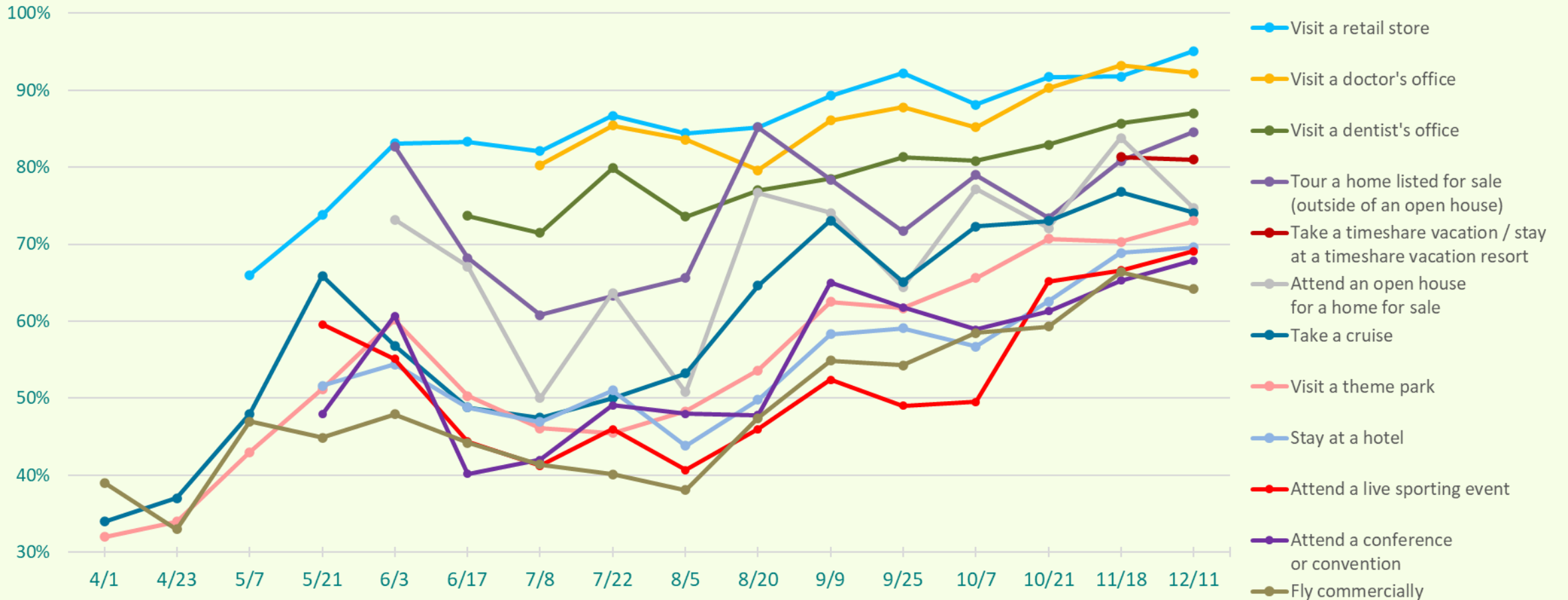
Back to Normal Barometer, Dec. 11, 2020

MOST PERSONAL/SOCIETAL CONCERNS RECEDE SLIGHTLY

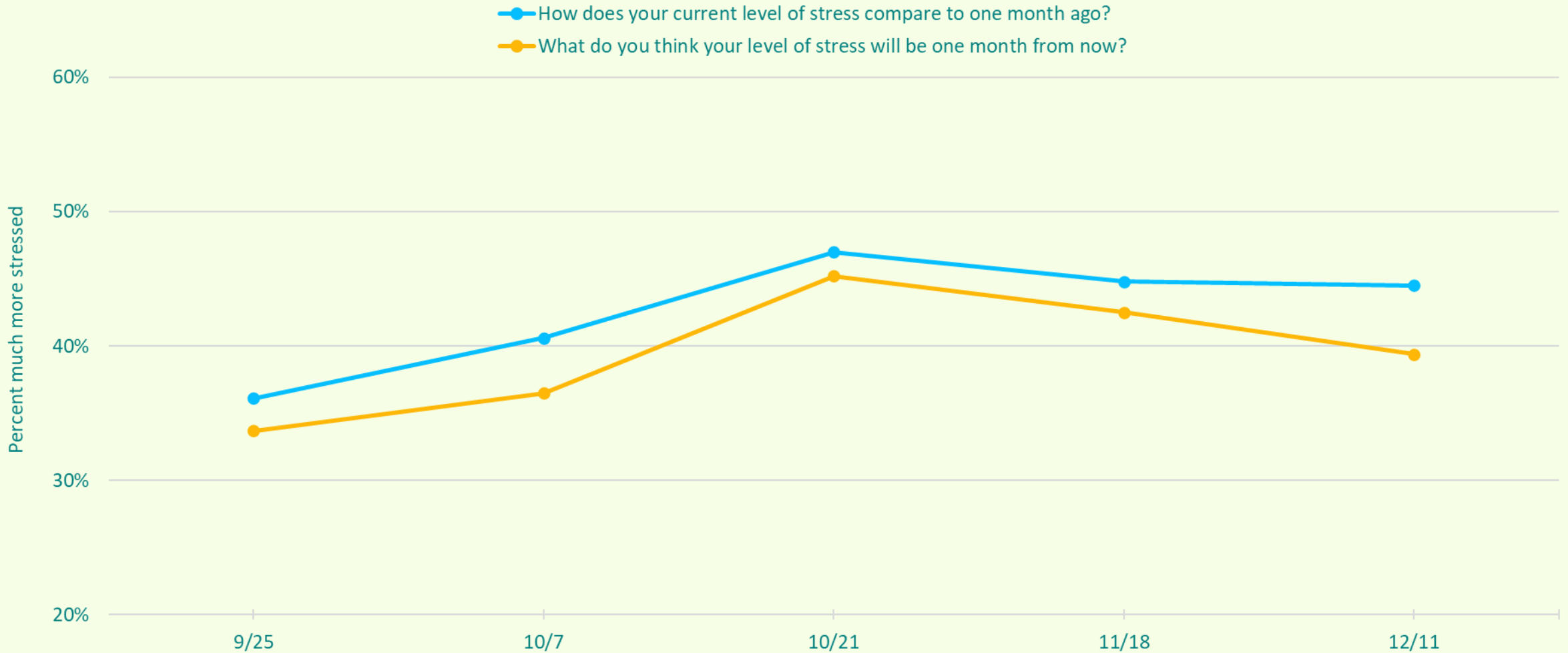


ENGAGEMENT IN MOST SECTORS CONTINUES TO RISE

[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

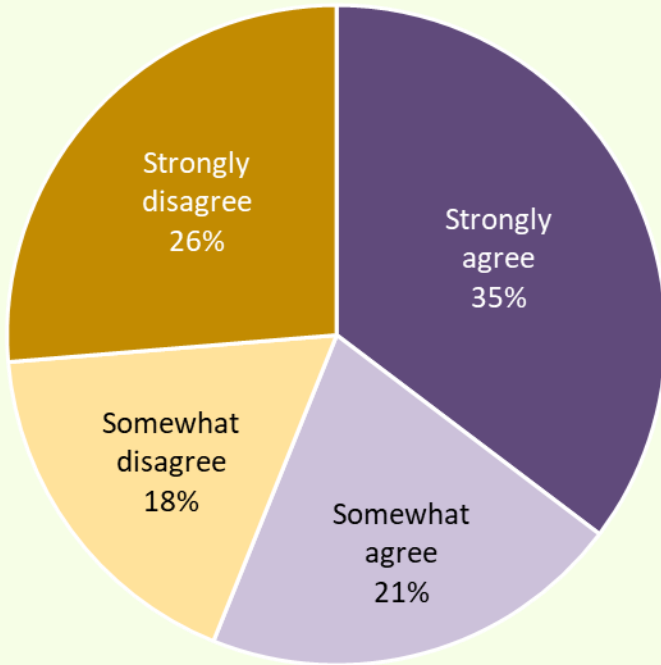


SLIGHTLY FEWER EXPECT MORE STRESS A MONTH FROM NOW

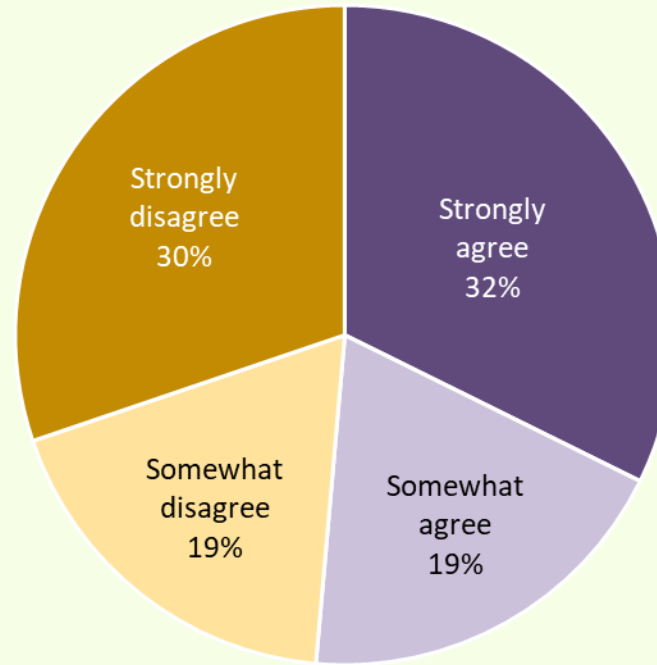


MAJORITY HAVE NO IDEA WHAT'S GOING ON LOCALLY

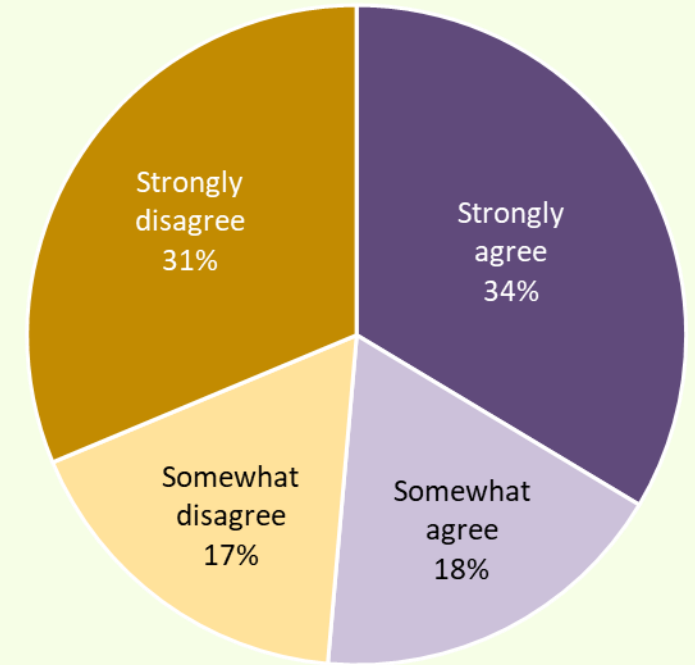
I have no clue what the local hospitalization rates for COVID-19 are in my area



I have no clue what the local infection rates for COVID-19 are in my area



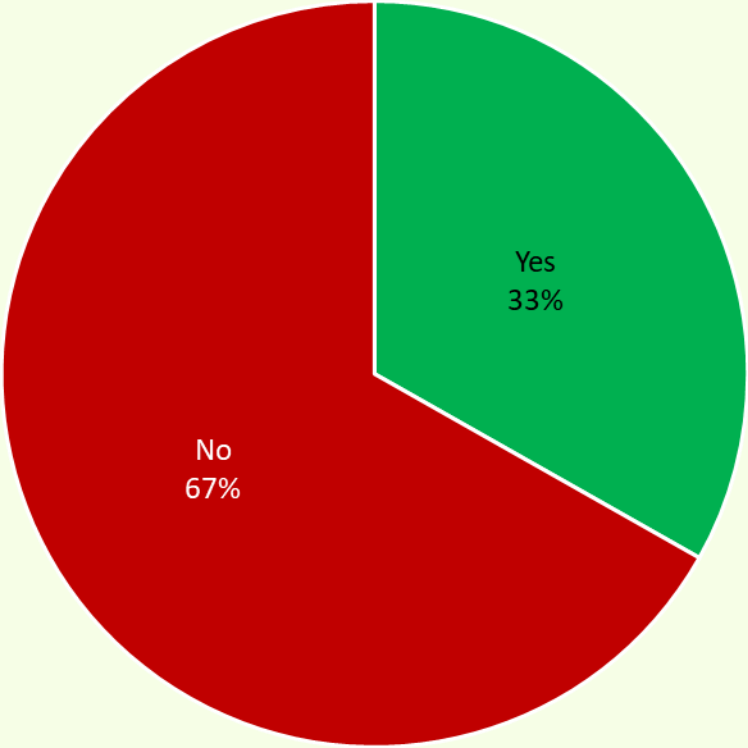
I have no clue what the local death rates for COVID-19 are in my area



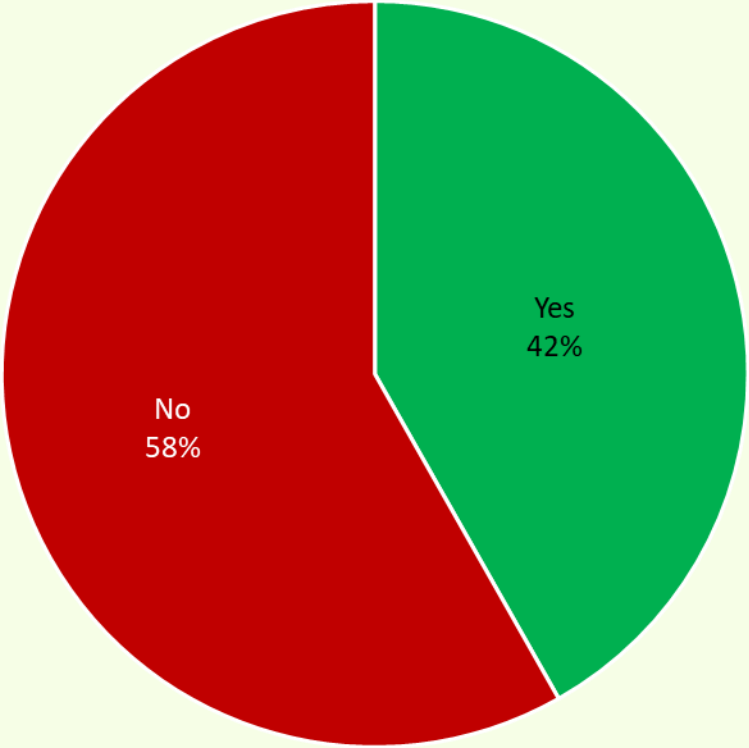
AT THE SAME TIME, GROWING % KNOW SOMEONE WHO DIED OF COVID

Do you know of anyone personally who died of COVID-19?

Wave 10 (late August)



Wave 16 (early December)

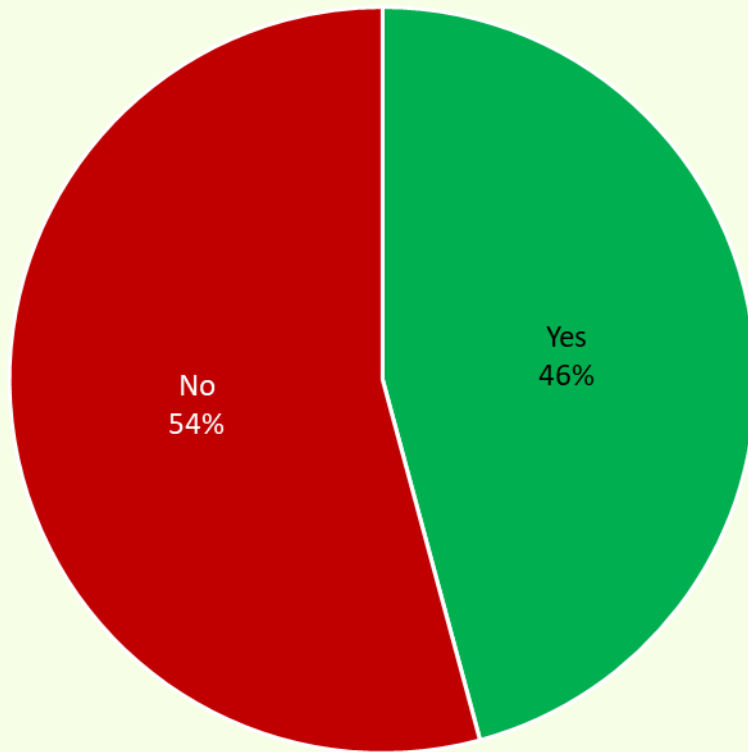


n=491, Aug 20, 2020; n=533, Dec. 11, 2020

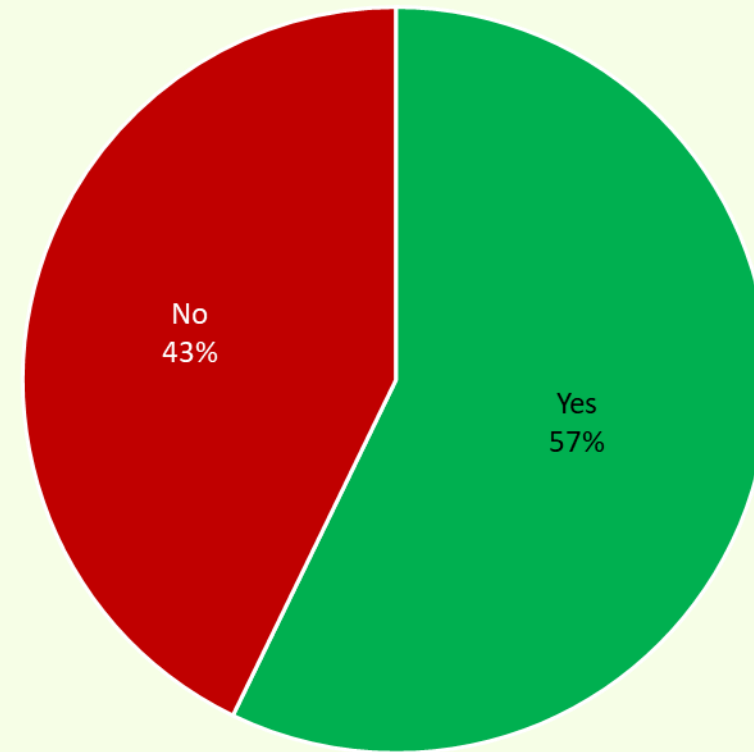
GROWING % KNOW SOMEONE WHO SUFFERED BUT DIDN'T DIE

Do you know anyone personally who suffered seriously from COVID-19 but did not die?

Wave 10 (late August)

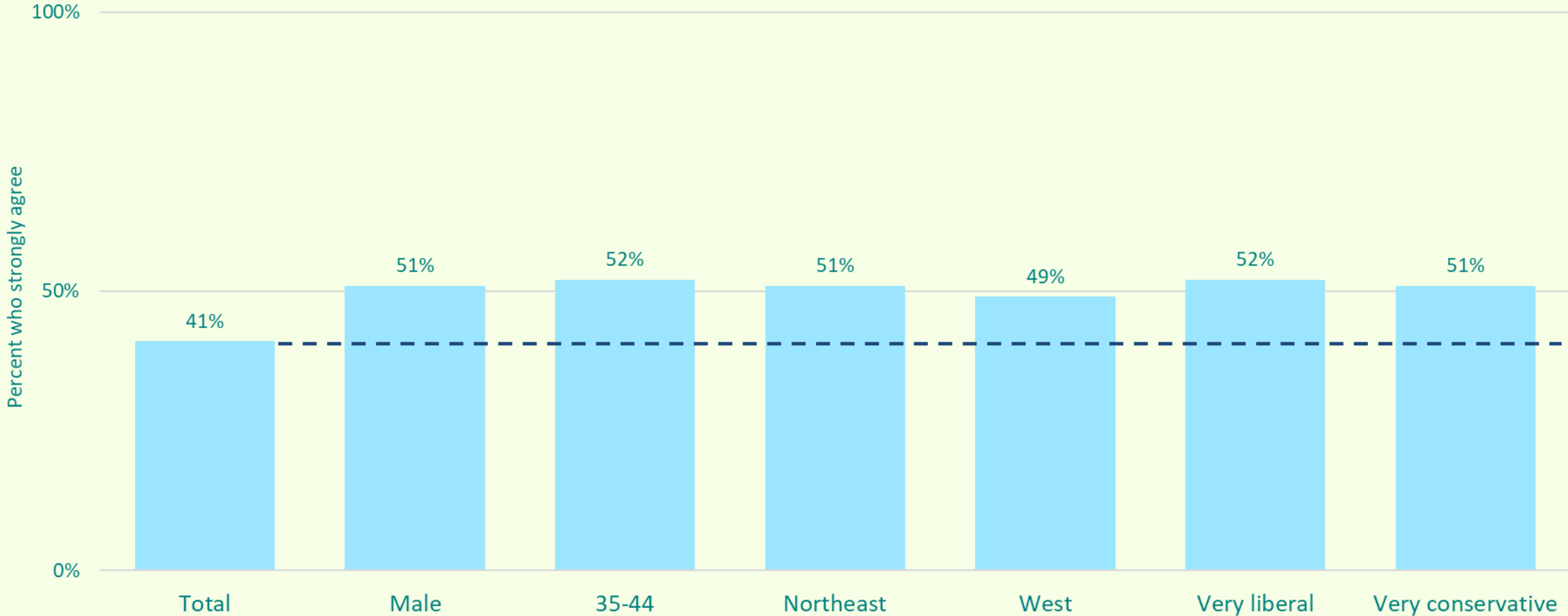


Wave 16 (early December)



DESPITE THAT, 41% STRONGLY AGREE: VIRUS LESS SCARY NOW

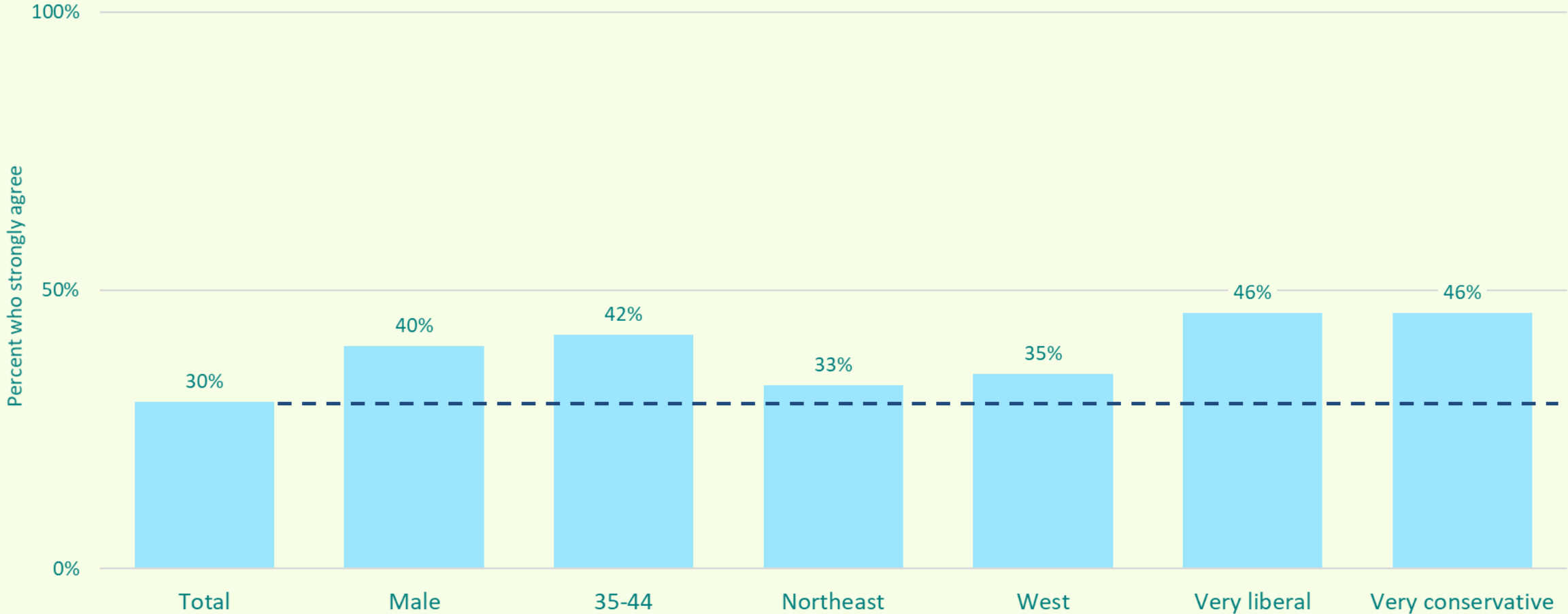
The prospect of catching COVID-19 is not as scary to me now as it was at the start of the pandemic.



n=533, Back to Normal Barometer, Dec. 11, 2020

NEARLY 1/3 STRONGLY AGREE: CATCHING COVID “NOT A BIG DEAL”

If I catch COVID-19, it's not a big deal.



n=533, Back to Normal Barometer, Dec. 11, 2020

LISTENING TO AMERICA: 10 IN-DEPTH INTERVIEWS



IT'S TIME TO RETURN TO NORMAL

- Despite recognizing that COVID cases are rising where they live and nationwide, most have little to no concern about contracting the virus
- They believe it's time to return to a sense of normalcy
 - They know a lot more than they did nine months ago – how the virus is transmitted and what they need to do to stay healthy
 - People they know have contracted it and recovered – they believe they are healthy and would recover, too
 - Some question the media's reporting, saying they “sensationalize” a lot of things to get clicks and to get people to tune in – what does it mean to die from “complications due to COVID?”
- With the vaccine rollout, almost all expect to be back to normal as a country between mid-2021 and early 2022, but local and state governments' restrictions will play a large role, too

THEY'RE DIVIDED OVER WHETHER TO GET VACCINATED

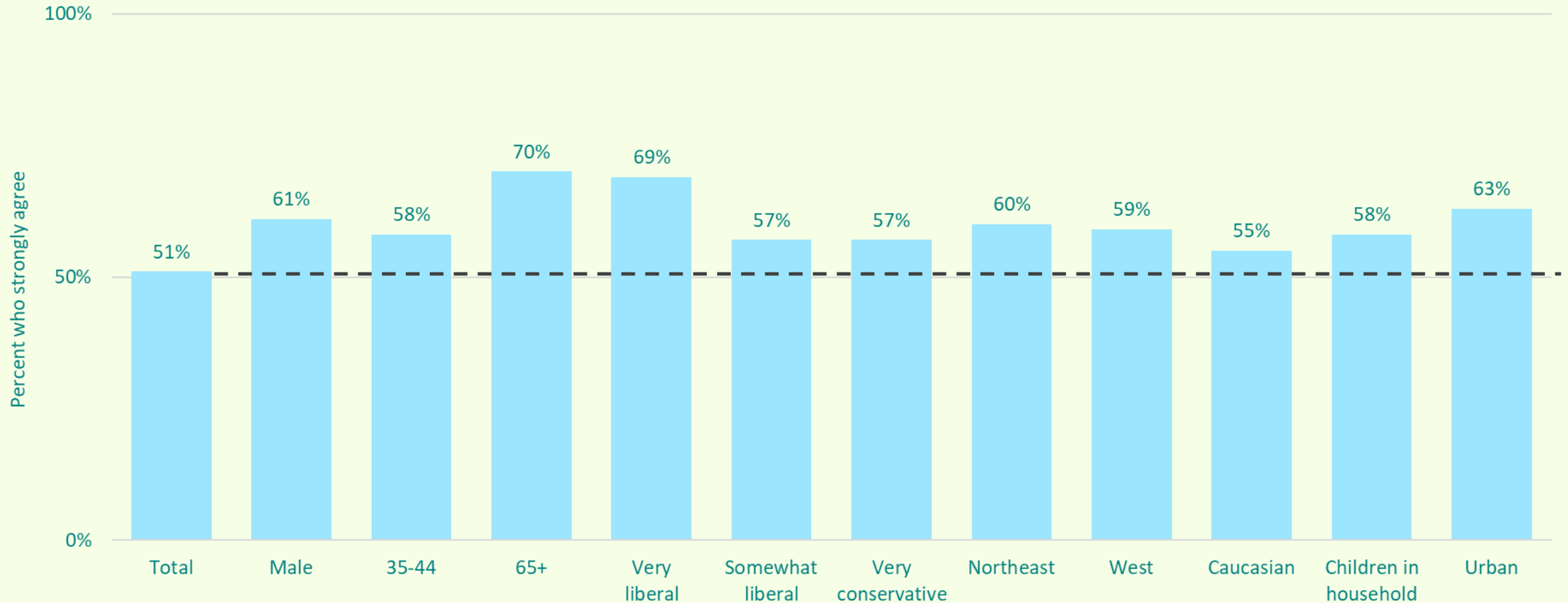
- Those planning to get the vaccine are satisfied with the rollout plan, which will allow the most vulnerable to get it first
- They expect to receive theirs by 2Q of 2021, and they're OK with that
- They have heard it's 90%+ effective and believe the benefits will outweigh the risks, including:
 - Moving us toward a return to normal
 - Improvements in the economy and people's state of mind
- Interestingly, they have little appetite for convincing those not planning to get it to change their mind – they believe it's their body, their choice

THEY'RE DIVIDED OVER WHETHER TO GET VACCINATED

- Those planning to not get vaccinated have concerns:
 - We don't know enough about the repercussions from it, including side effects – we need more data
 - Some have taken the flu vaccine and still contracted it
 - One respondent cited a vaccine given in the Philippines that killed a lot of children
- Again, some people believe getting the vaccine isn't necessary because they would recover from COVID if infected

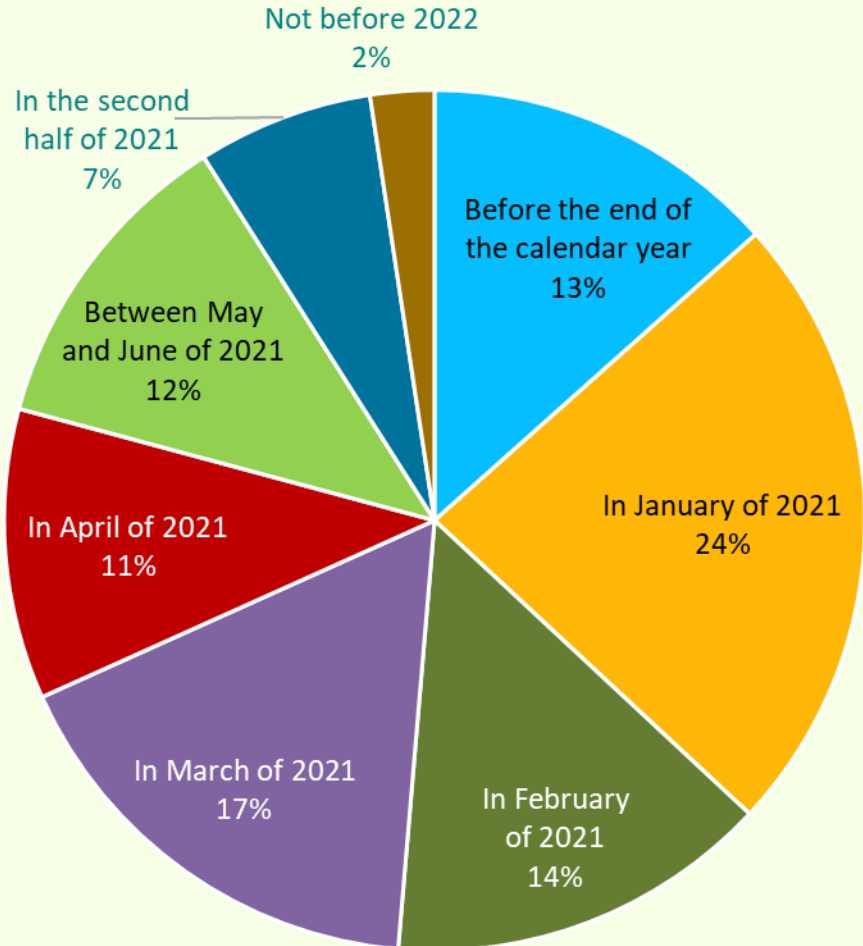
HERE'S WHO'S MOST LIKELY TO GET VACCINATED

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



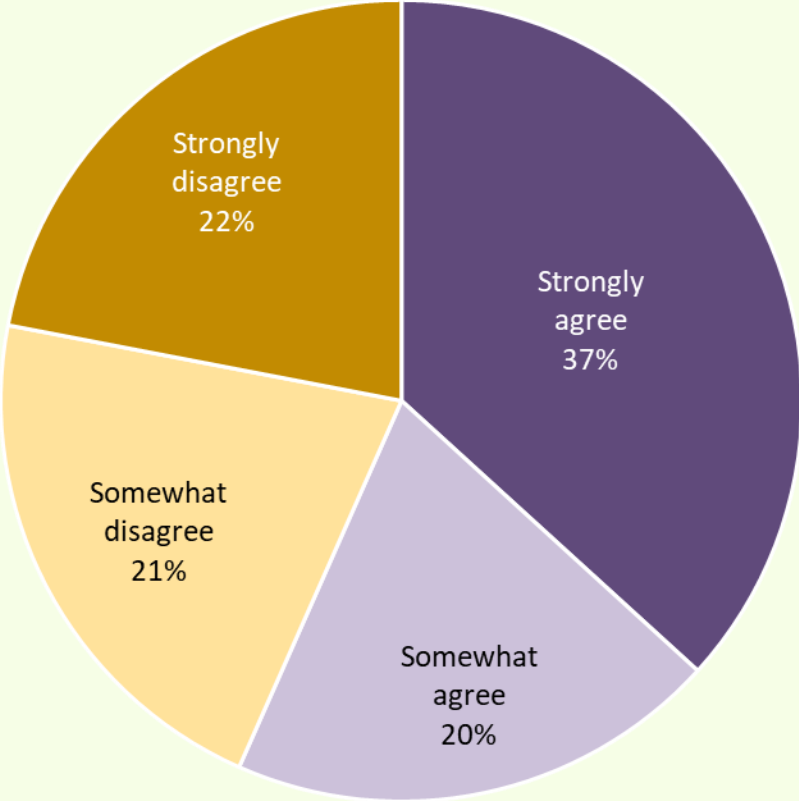
MAJORITY EXPECT VACCINE BY END OF FEBRUARY

When do you anticipate that a COVID-19 vaccine will be widely available in this country?

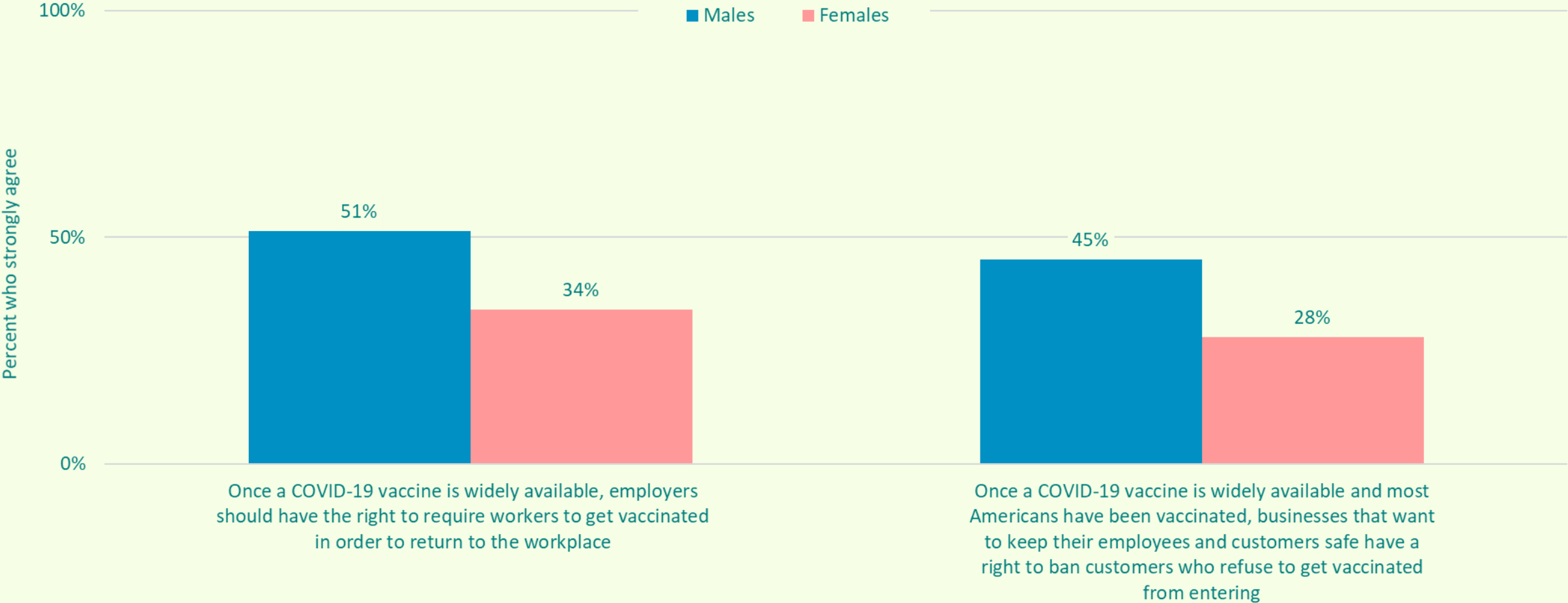


BUSINESS SHOULD BE ABLE TO BAN THE NON-VACCINATED

Once a COVID-19 vaccine is widely available and most Americans have been vaccinated, businesses that want to keep their employees and customers safe have a right to ban customers who refuse to get vaccinated from entering.



BUSINESS SHOULD BE ABLE TO BAN THE NON-VACCINATED



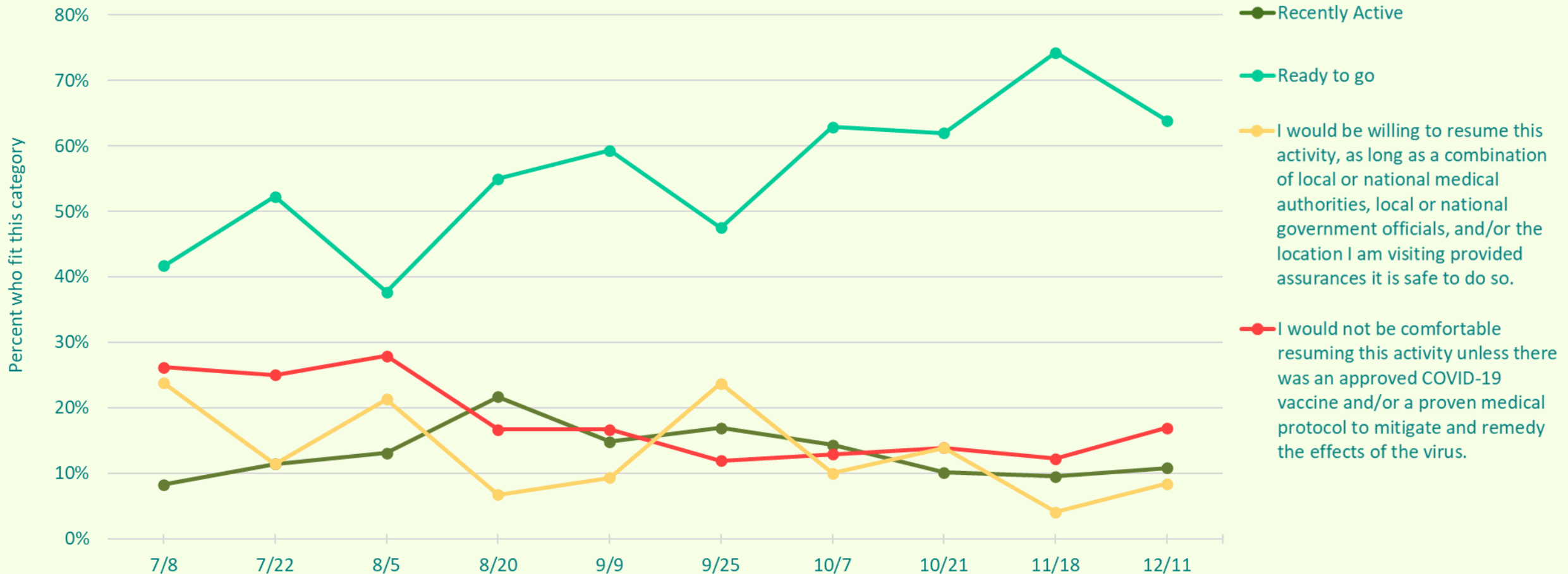
n=533, Back to Normal Barometer, Dec. 11, 2020

NAR



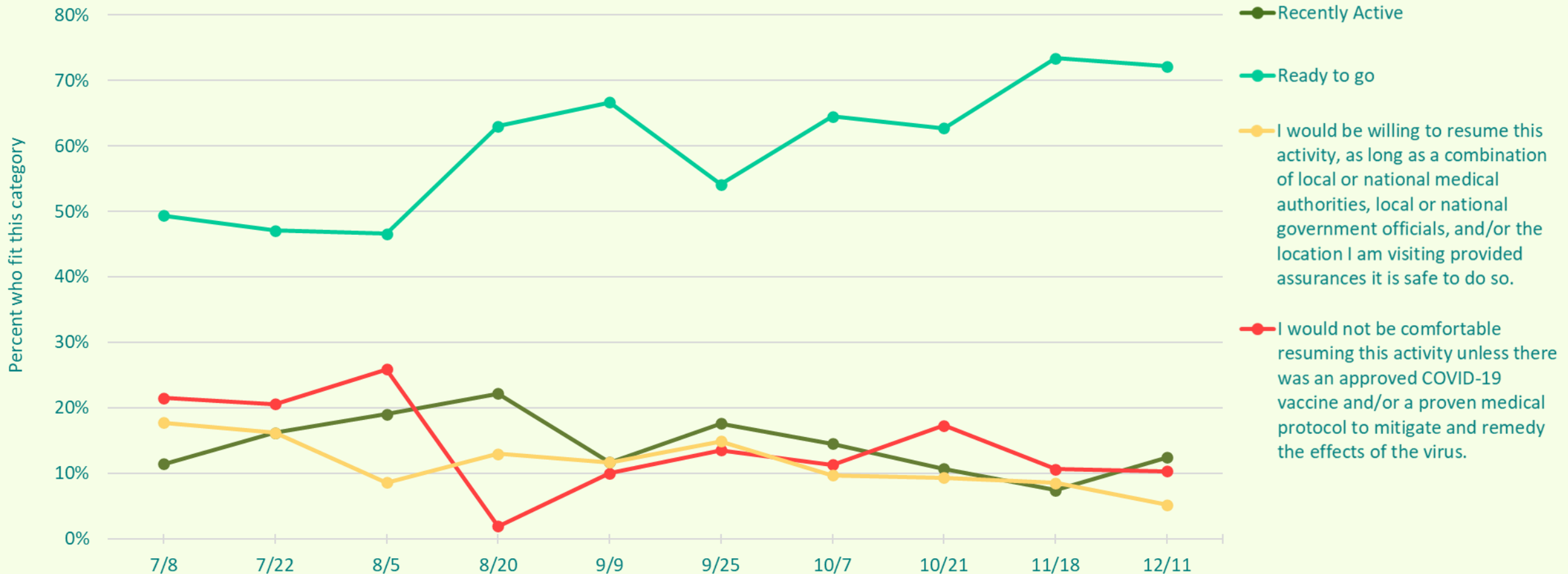
70%+ ARE READY TO GO OR RECENTLY ACTIVE

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



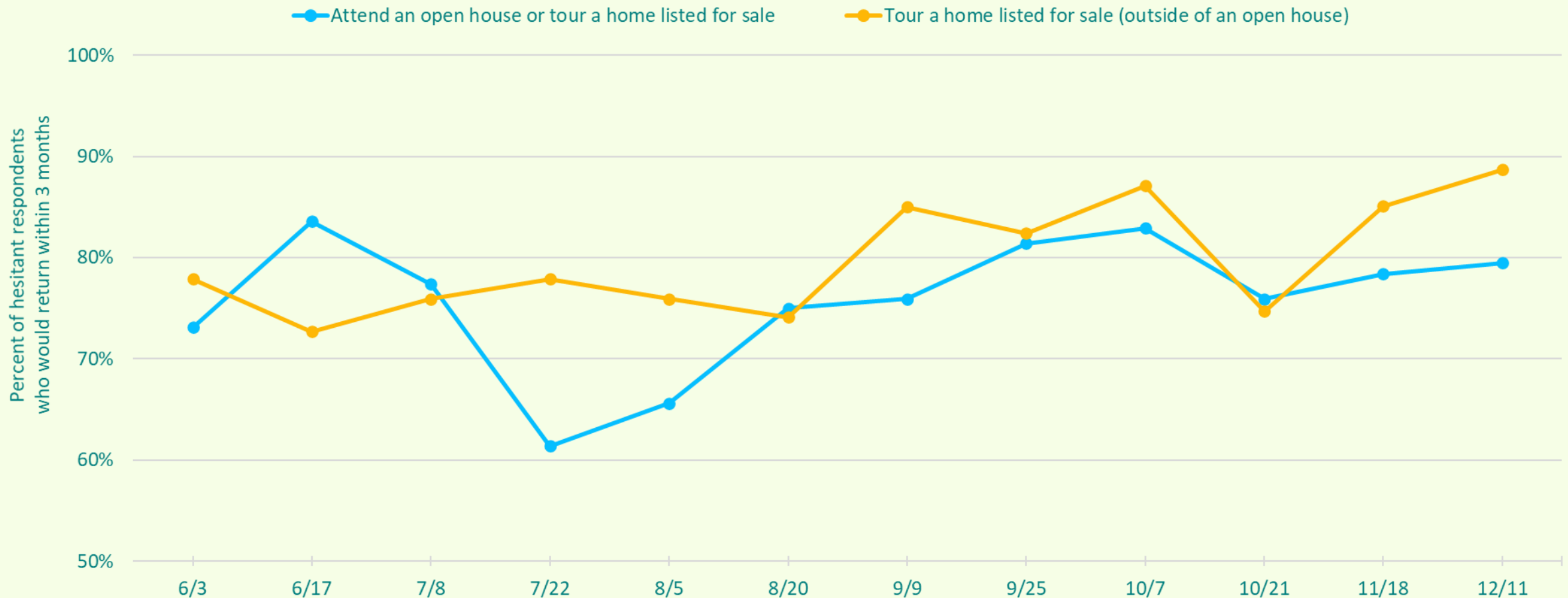
80%+ ARE READY TO GO OR RECENTLY ACTIVE

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



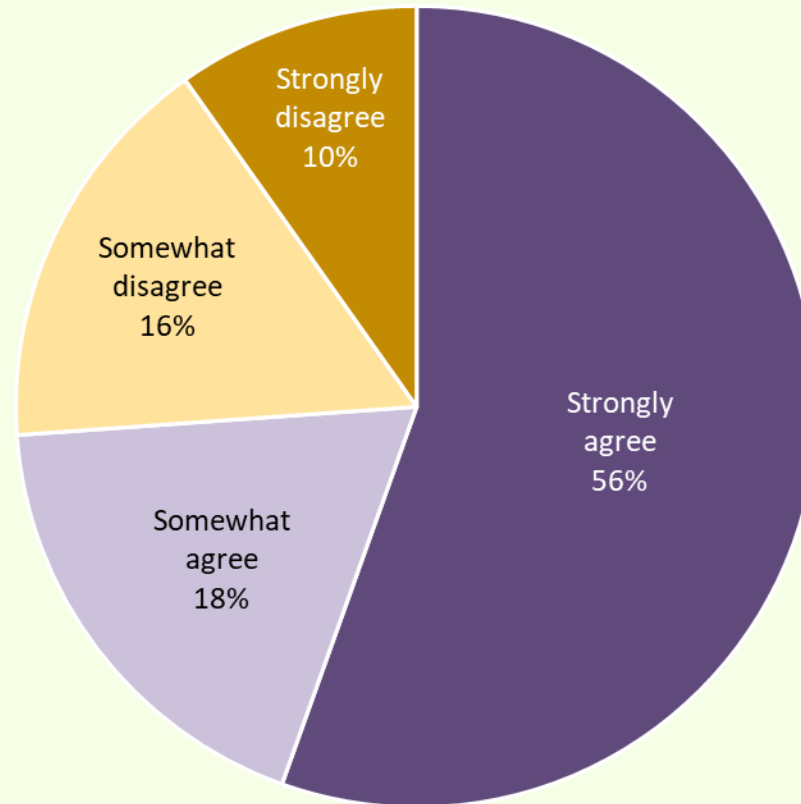
REALTORS: RETURN IN 3 MONTHS

[Among those hesitant:] Assuming you had the necessary assurances that it was safe to resume normal activities, how quickly would you next...



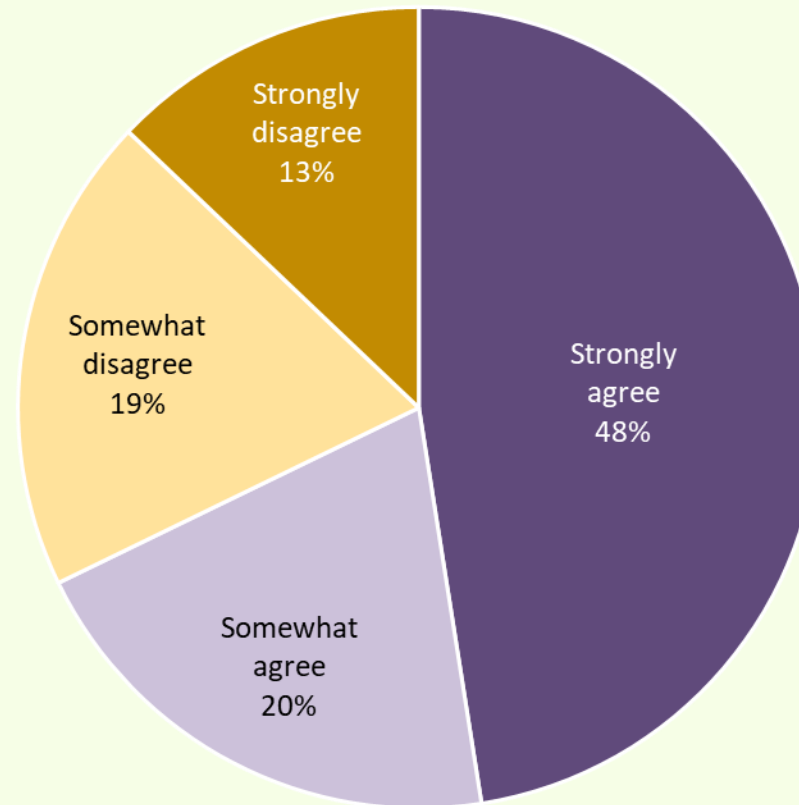
STRONG WORRY ABOUT STATE AND LOCAL BUDGETS

I am concerned about the financial burden that COVID-19 is placing on state and local budgets where I live.



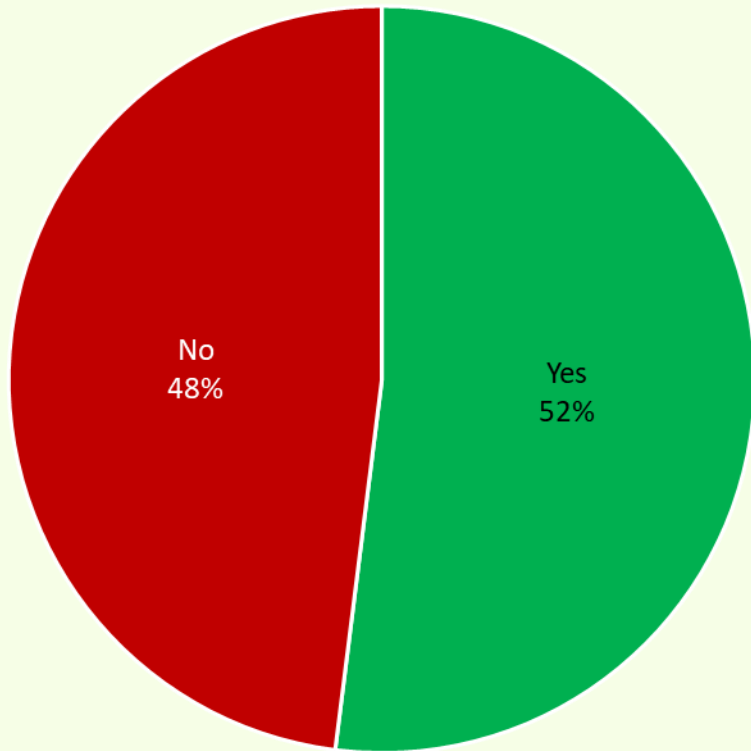
2/3 WORRY ABOUT HIGHER TAXES

I am concerned that state and local taxes might have to be raised in order to pay for the expanded COVID-19-related services my state and locality are providing.

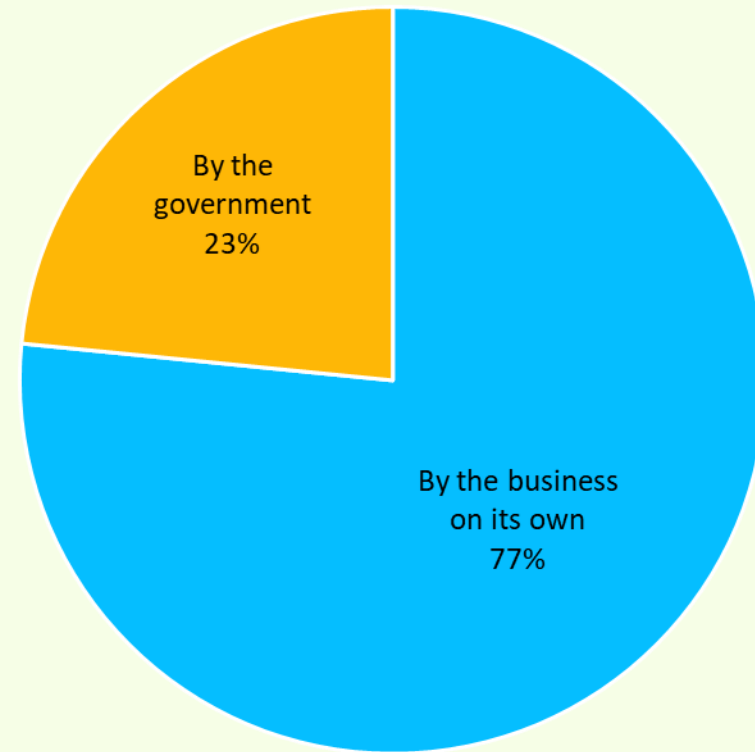


HALF HAVE NOTICED SURCHARGE; ¼ THINK IT'S FROM GOV'T

Have you personally noticed that certain businesses, such as restaurants, are adding a COVID-19 surcharge to the bill?

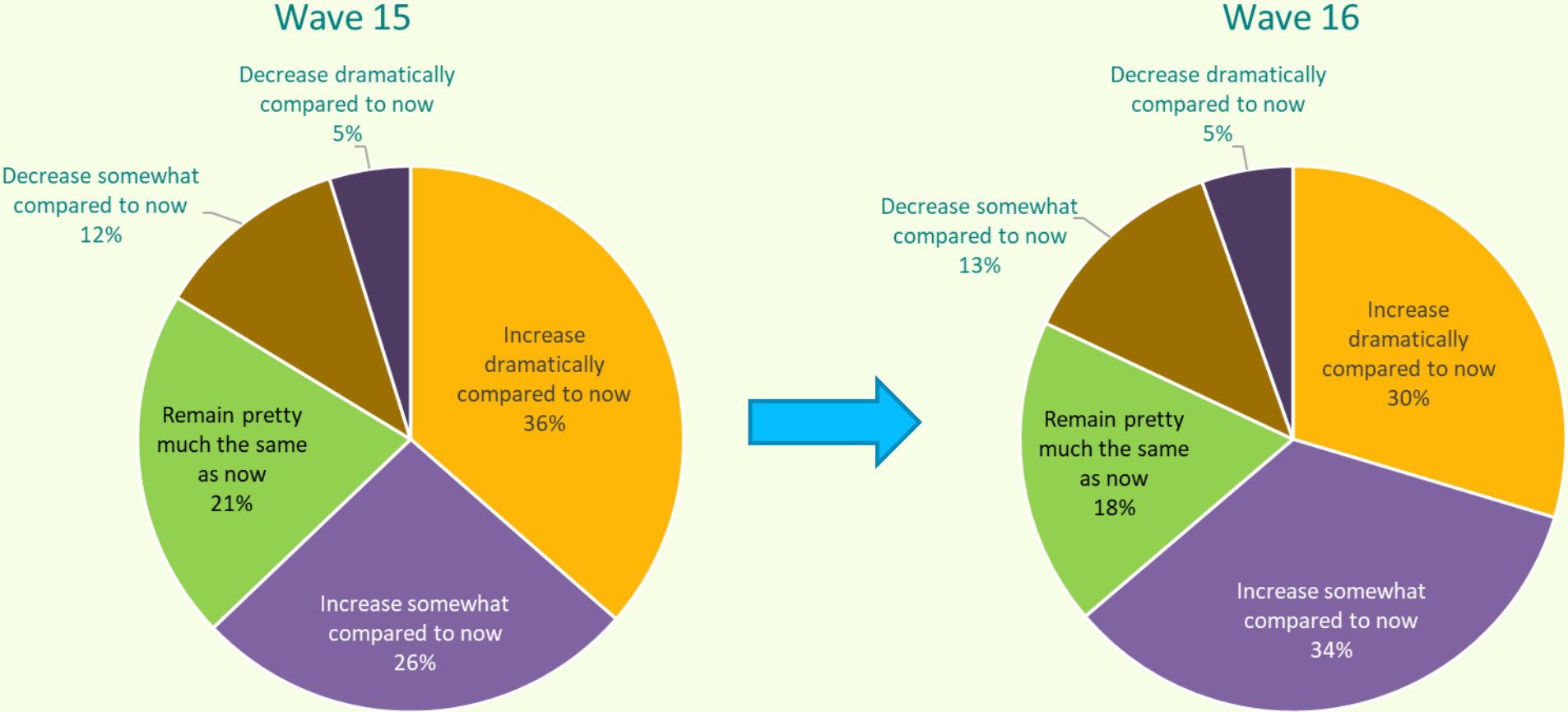


[Among those who noticed] Is this surcharge imposed by the business on its own, or is it imposed by the government like a sales tax?



HIGHER PERCENTAGE THINK THE # OF CASES WILL RISE

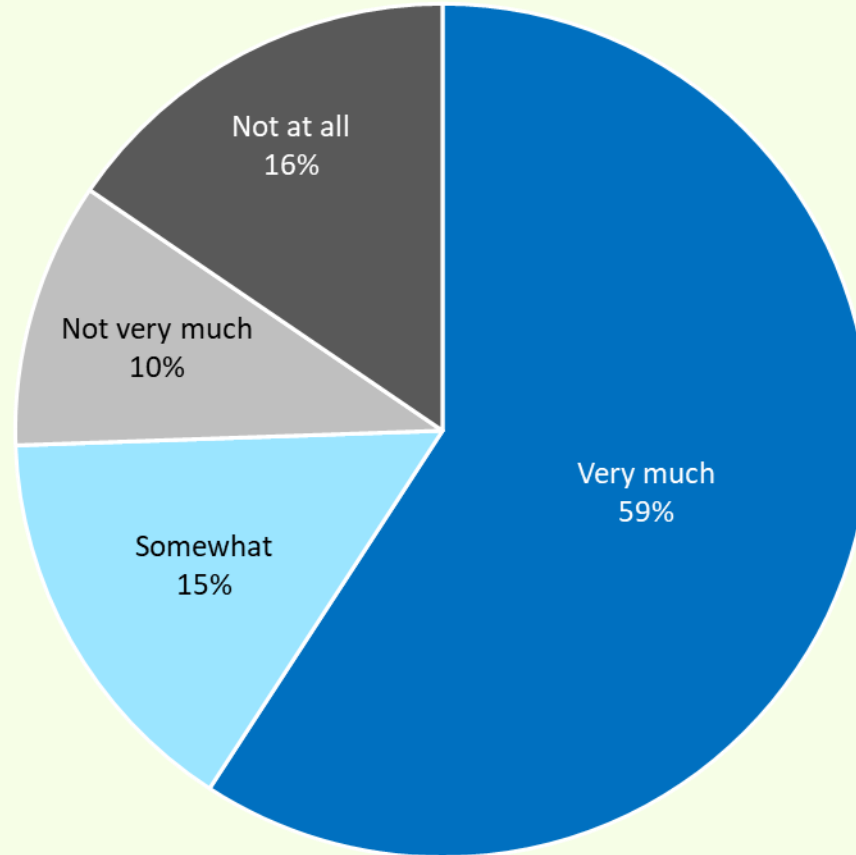
When it comes to the number of new daily COVID-19 cases in the U.S. over the next two months, do you expect the number to...



n=538, n=533, Back to Normal Barometer, Dec. 11, 2020

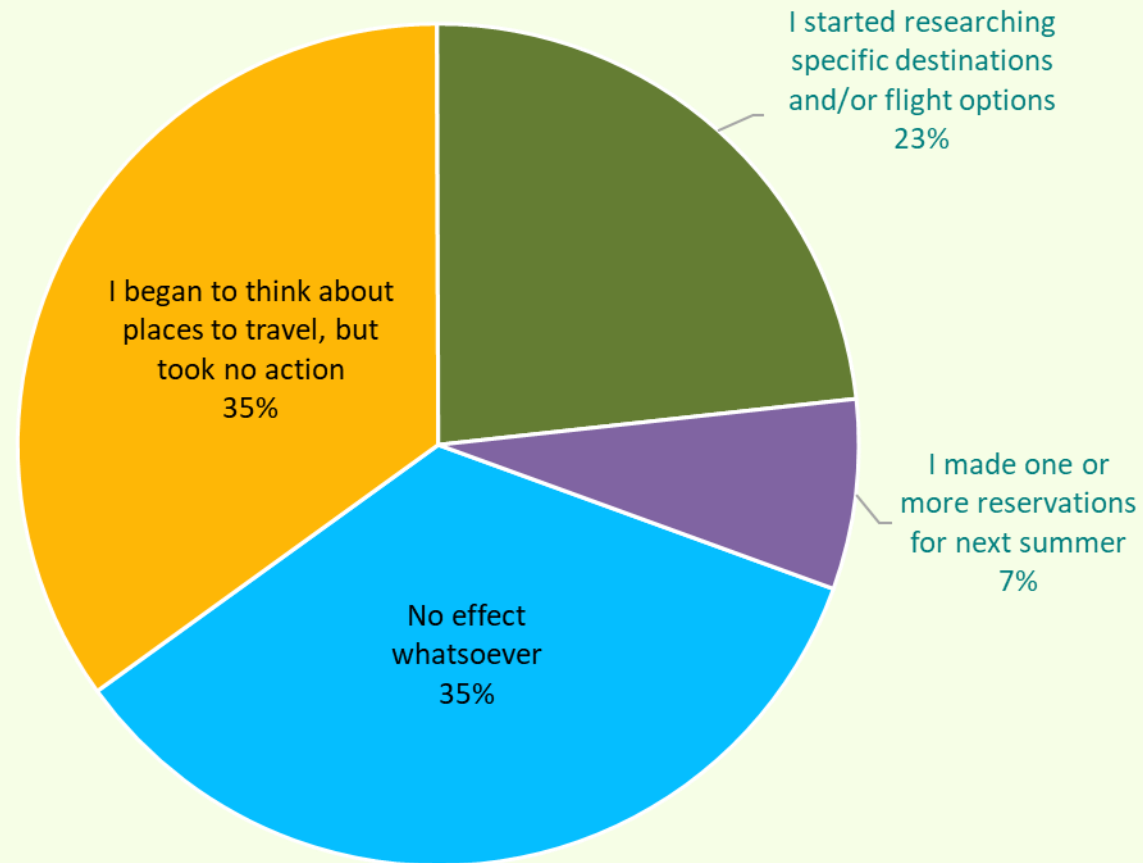
THOSE WFH ARE VERY EAGER TO GET BACK TO THE OFFICE

How eager are you to return full time to your workplace outside of your home, relative to three months ago?



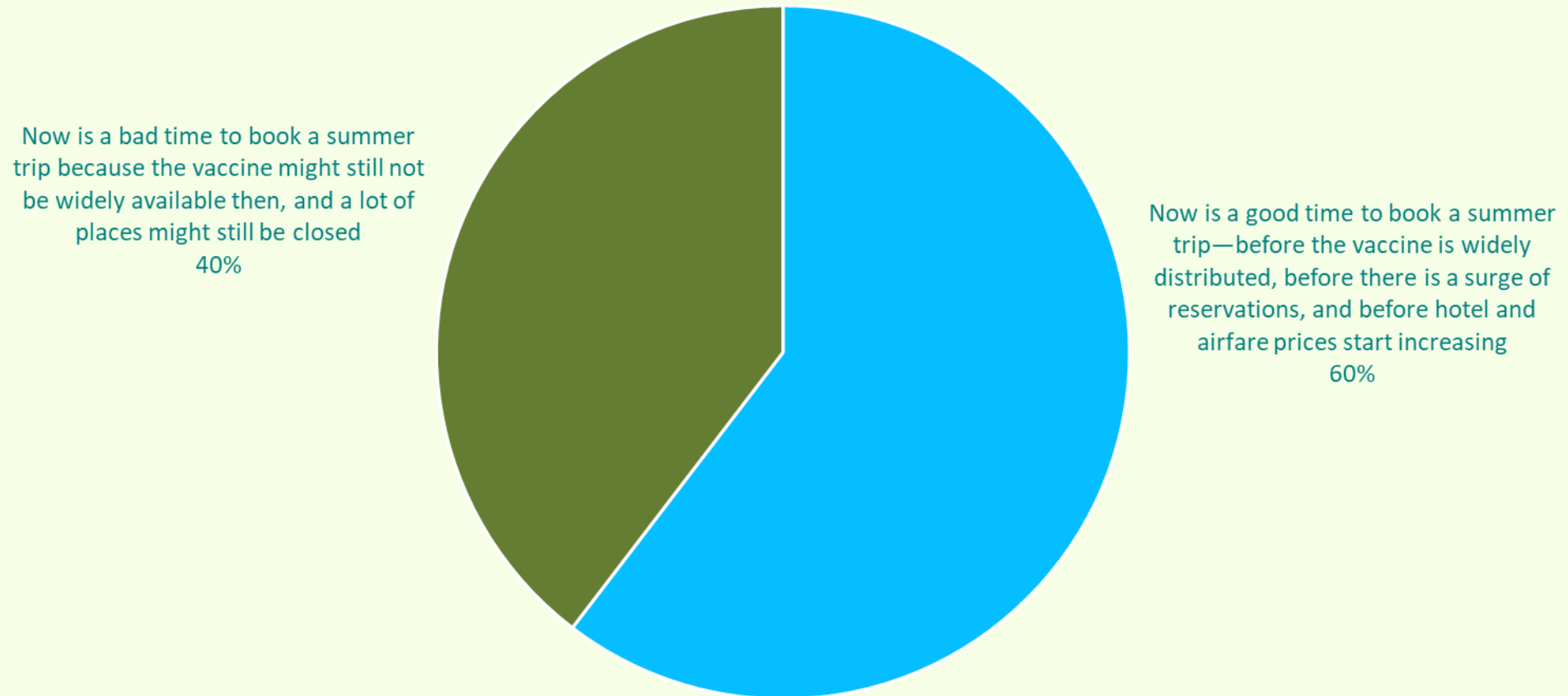
VACCINE NEWS ANIMATES SUMMER '21 TRAVEL PLANS

What impact if any did the recent announcements about upcoming vaccines have on your 2021 summer travel plans?



60% SAY NOW IS A GOOD TIME TO BOOK SUMMER TRIP

Which of the following comes closer to your thinking about traveling next summer?



QUESTIONS?

- What questions do you have about the findings?
- What should we ask in wave 17?

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