



# PUBLIC OPINION STRATEGIES

turning questions into answers

## The Coronavirus: Public Opinion

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December 30, 2020

Over the course of the COVID-19 outbreak, we have carefully and thoroughly tracked publicly available public opinion research on a wide variety of issues relevant to both our work and our clients' work.

Drawing from multiple national surveys conducted over the past few weeks, this summary analyzes key data on the impact the outbreak continues to have as Americans close out 2020 in the midst of the fall/winter surge.

Jarrett Lewis, Elizabeth Harrington and Bill McInturff partnered on this slide deck, and Cassie Bauserman and Russ Brunner provided analytical support.

**I. Where Are We?**

**II. Economic Impact**

**III. Political Impact**

**IV. Attitudes On The Vaccine**

**V. Impact On The Health Care System**



## *I. COVID-19: Where Are We?*

**48%**

of all Americans live in households where someone has **lost employment income** since March 13

**26%**

of all Americans have **delayed medical care** in the past 4 weeks because of COVID-19

**35%**

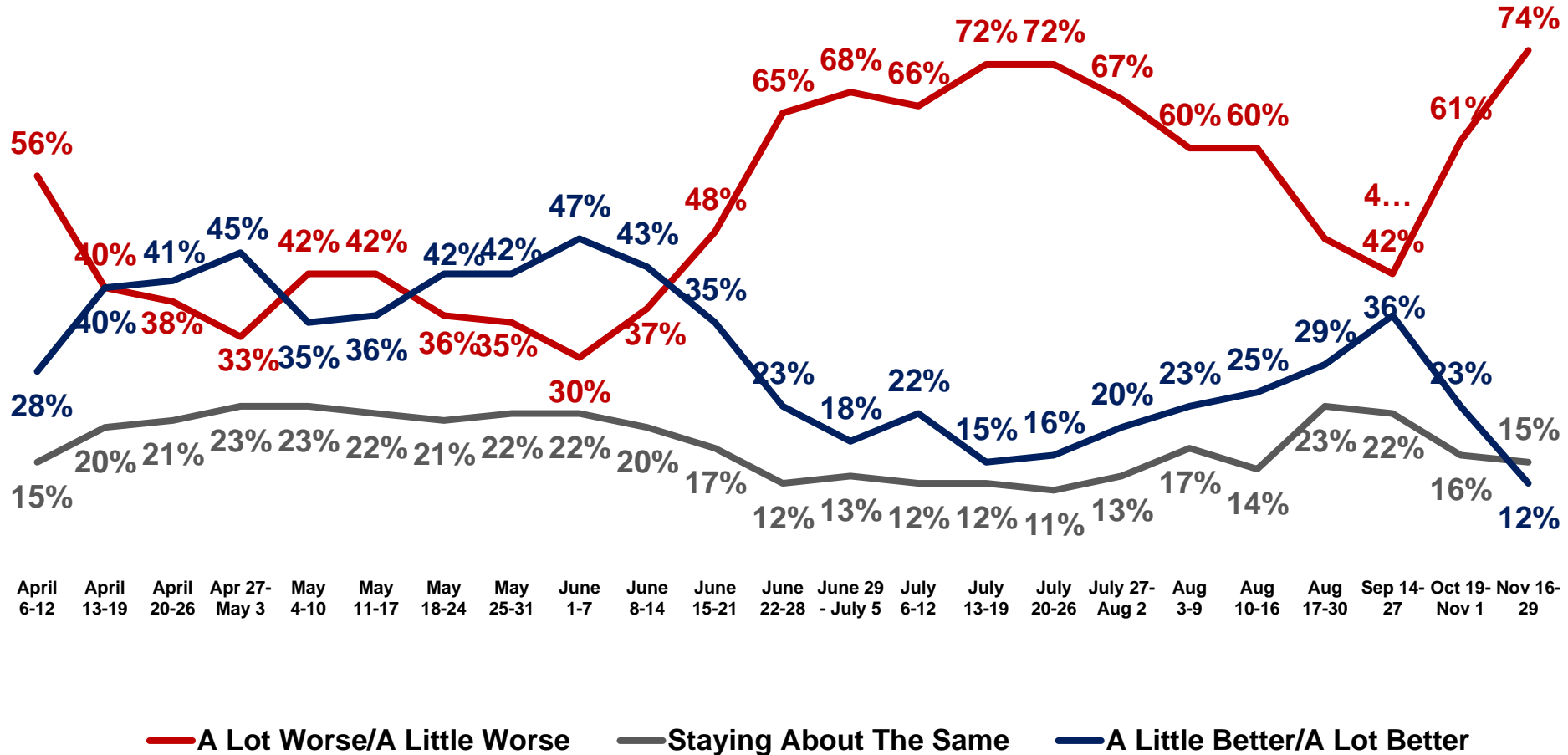
of Americans live in households where **eviction or foreclosure in the next two months is either very likely or somewhat likely**

**51%**

of Americans say **stress related to COVID-19** has had a negative impact on their mental health

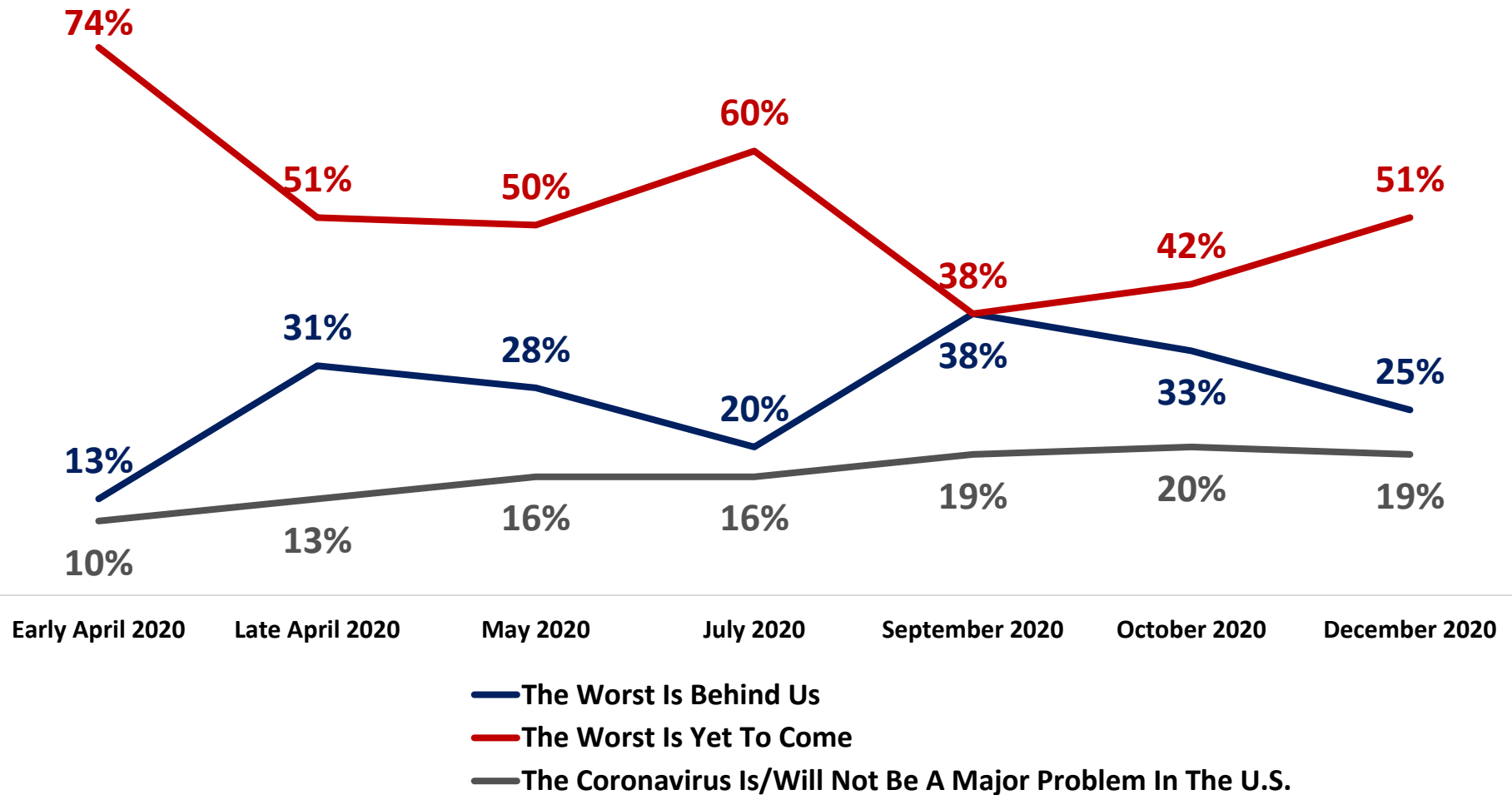
# Nearly three-quarters of Americans recognize the worsening coronavirus situation.

What's your impression of the coronavirus situation in the U.S. today? Is it -- getting a lot worse, getting a little worse, staying about the same, getting a little better or getting a lot better?



# A slight majority of Americans now believe the worst is ahead of us.

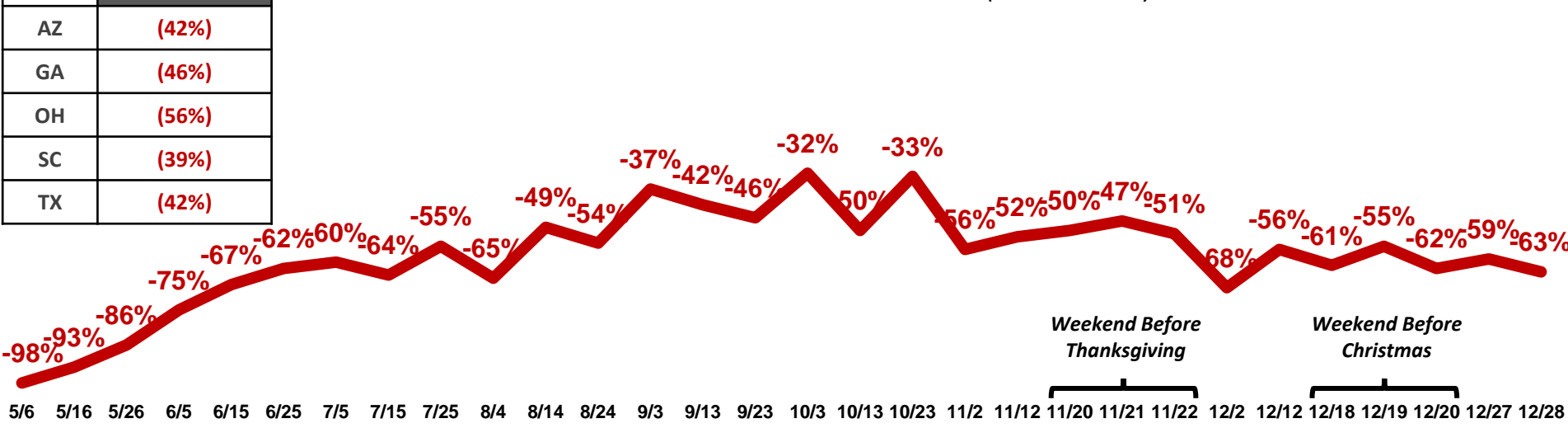
Which of the following best describes your feelings about the coronavirus outbreak in the United States?



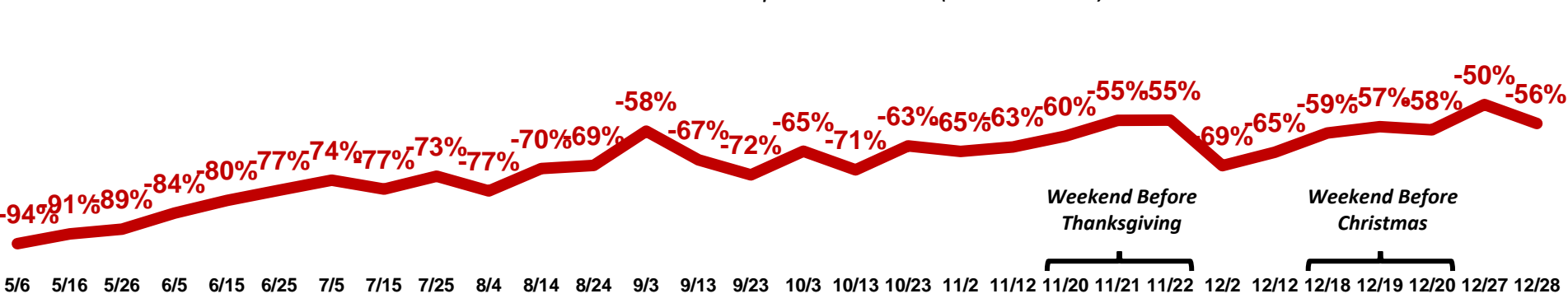
Americans are dining out at a lower rate than in the summer/fall, while airline traffic has slowly risen but remains 50%-60% below where it was this time last year.

| State | December 28 % YoY Change |
|-------|--------------------------|
| AZ    | (42%)                    |
| GA    | (46%)                    |
| OH    | (56%)                    |
| SC    | (39%)                    |
| TX    | (42%)                    |

Year-Over-Year Seated Diners At U.S. Restaurants (2019 & 2020)



Year-Over-Year TSA Checkpoint Numbers (2019 & 2020)

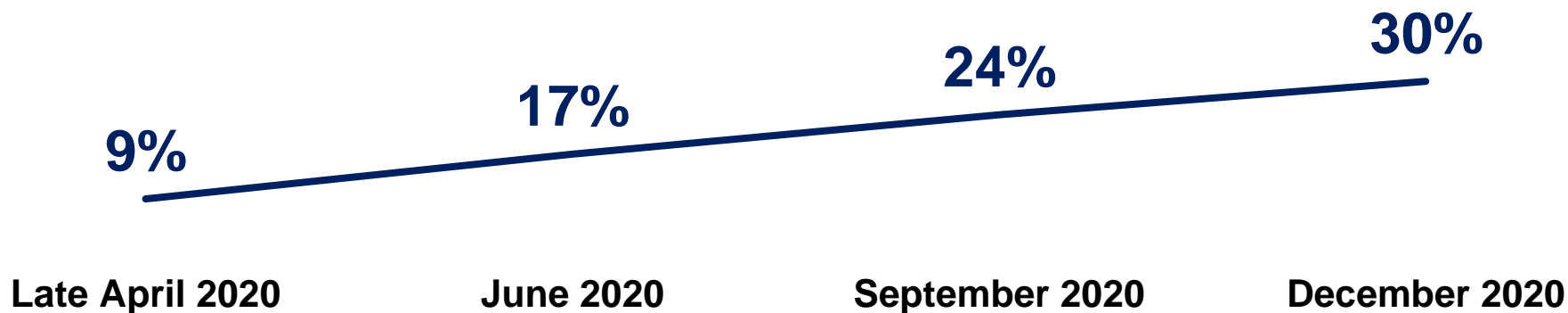




# 3-in-10 Americans report knowing someone who has died from complications related to coronavirus.

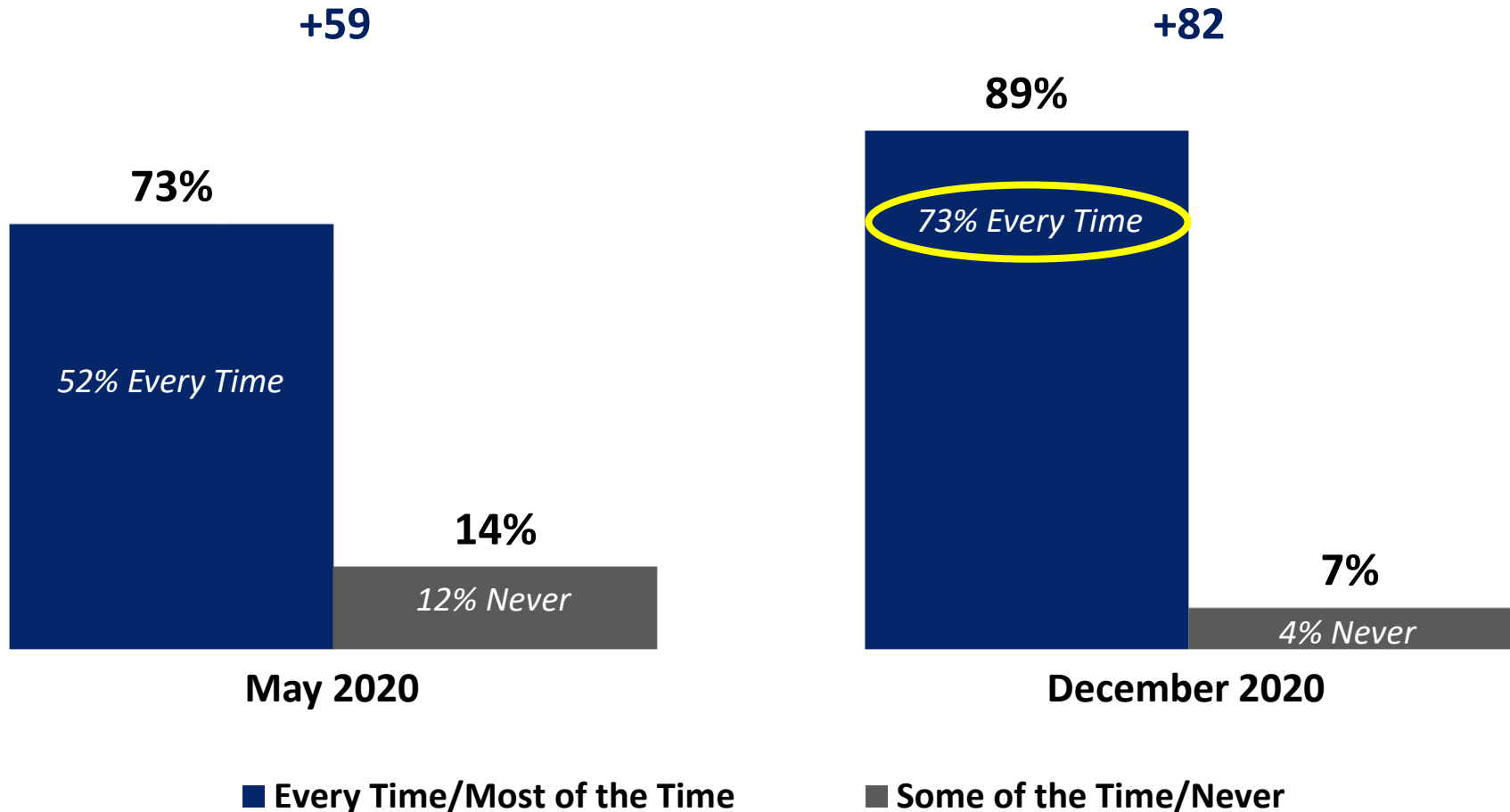
*Do you personally know anyone who has died from complications related to coronavirus, or not?*

**% Yes**



# Nearly three-quarters of Americans now report wearing a mask every time they leave their house.

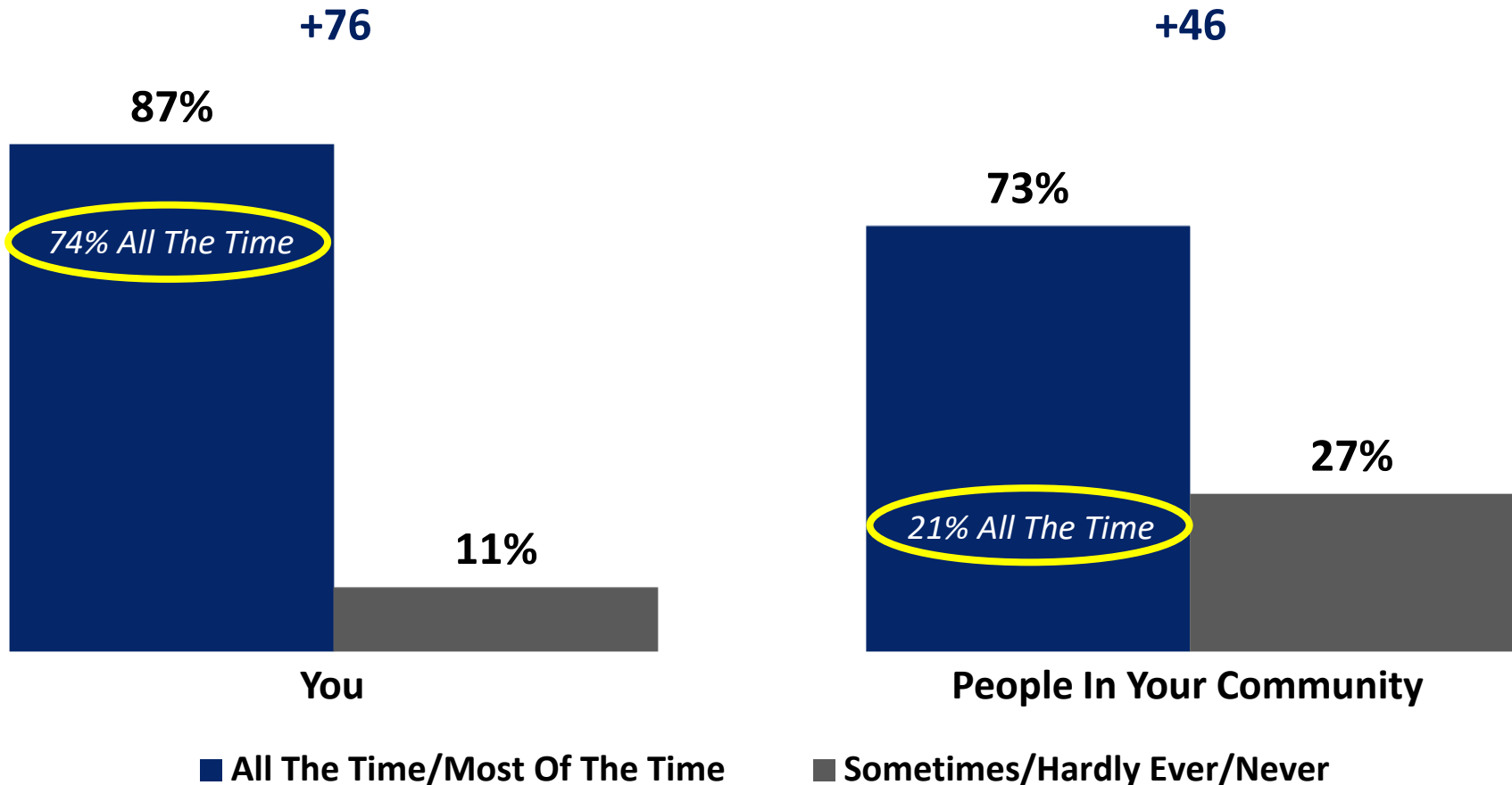
How often, if at all, do you wear a protective mask when you leave your house and might be in contact with other people?



# While Americans self-report a high mask utilization rate, they report a notably lower mask utilization rate for others in their community.

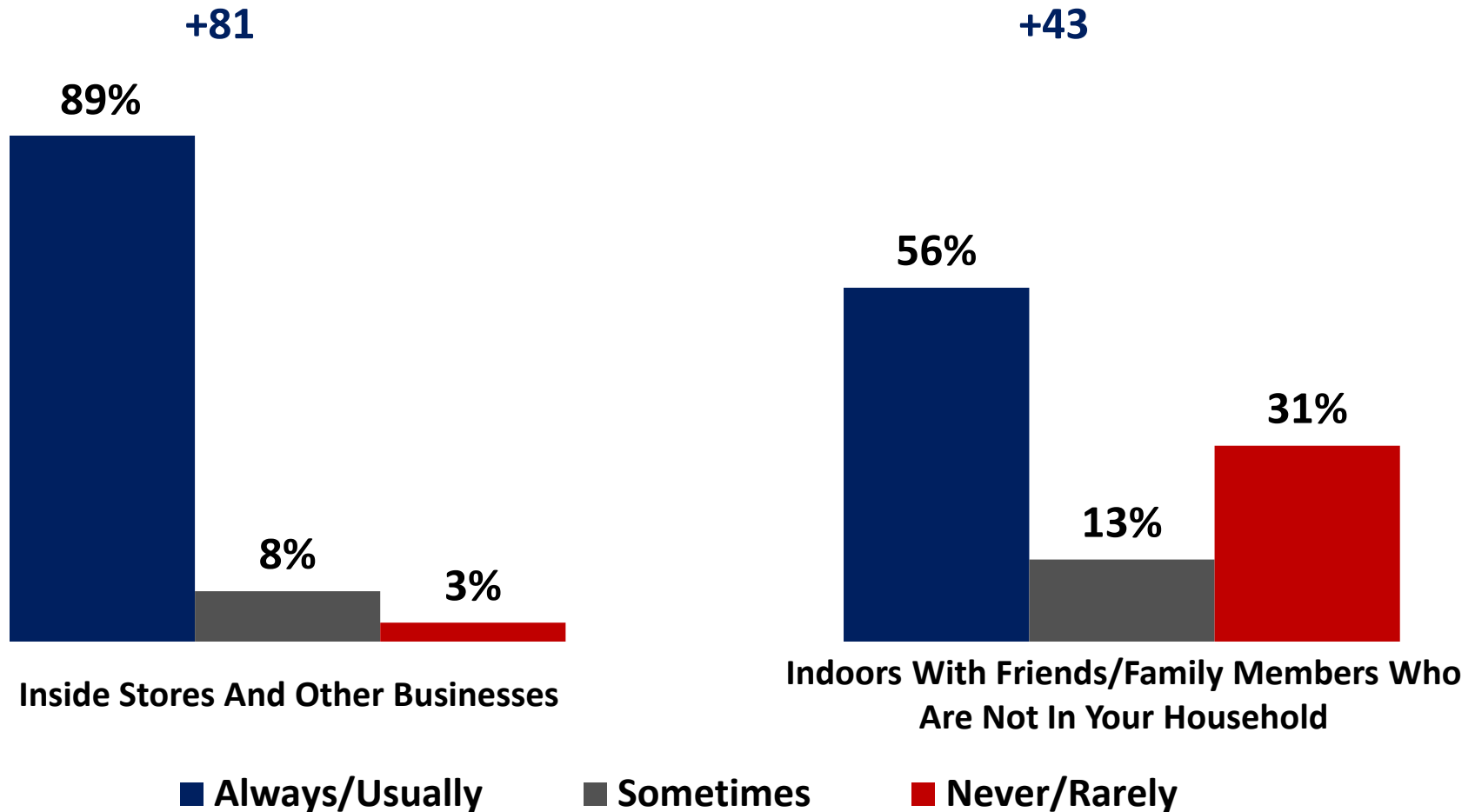
How often would you say - **you** wear a mask when you go out in public where six feet of social distancing can't always be maintained: all the time, most of the time, sometimes, hardly ever, or never?

How often would you say - **people in your community** wear a mask when they go out in public where six feet of social distancing can't always be maintained: all the time, most of the time, sometimes, hardly ever, or never?



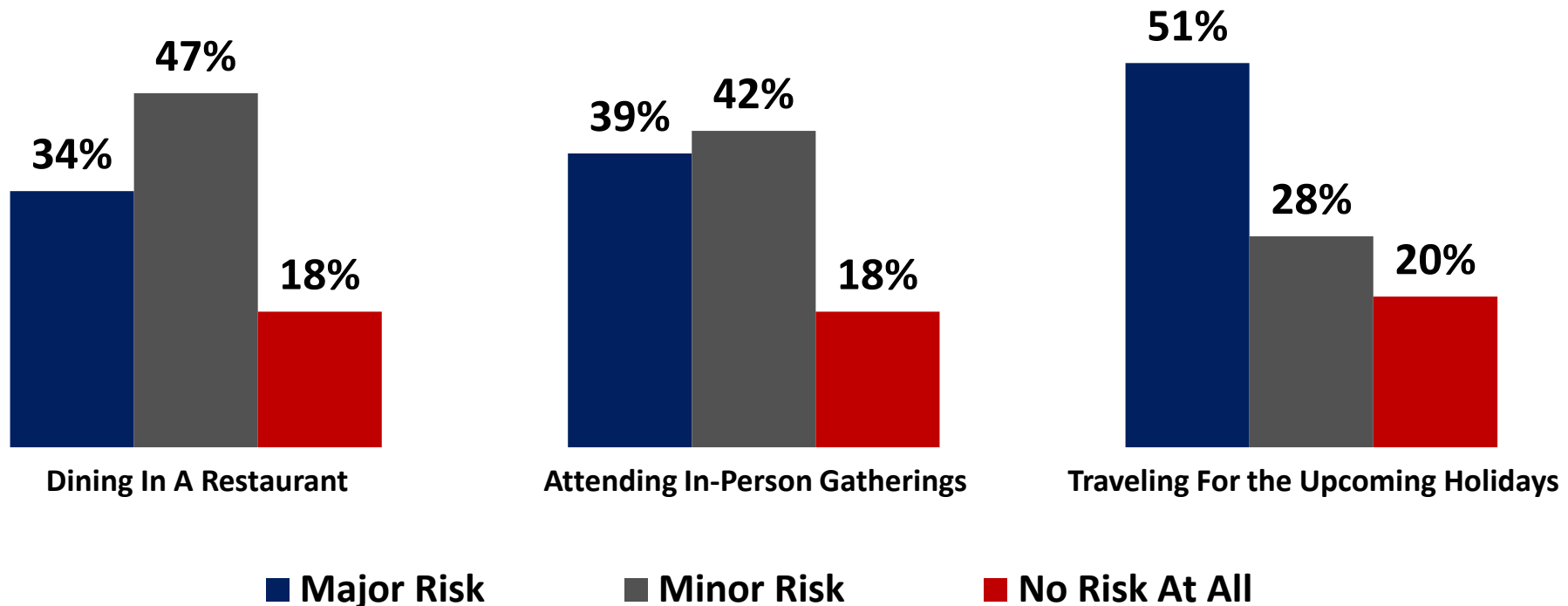
# A slim majority of Americans report always or usually wearing masks indoors with friends/family members who are not in their household.

How often do you wear a face mask in situations when you are near other people outside your household?



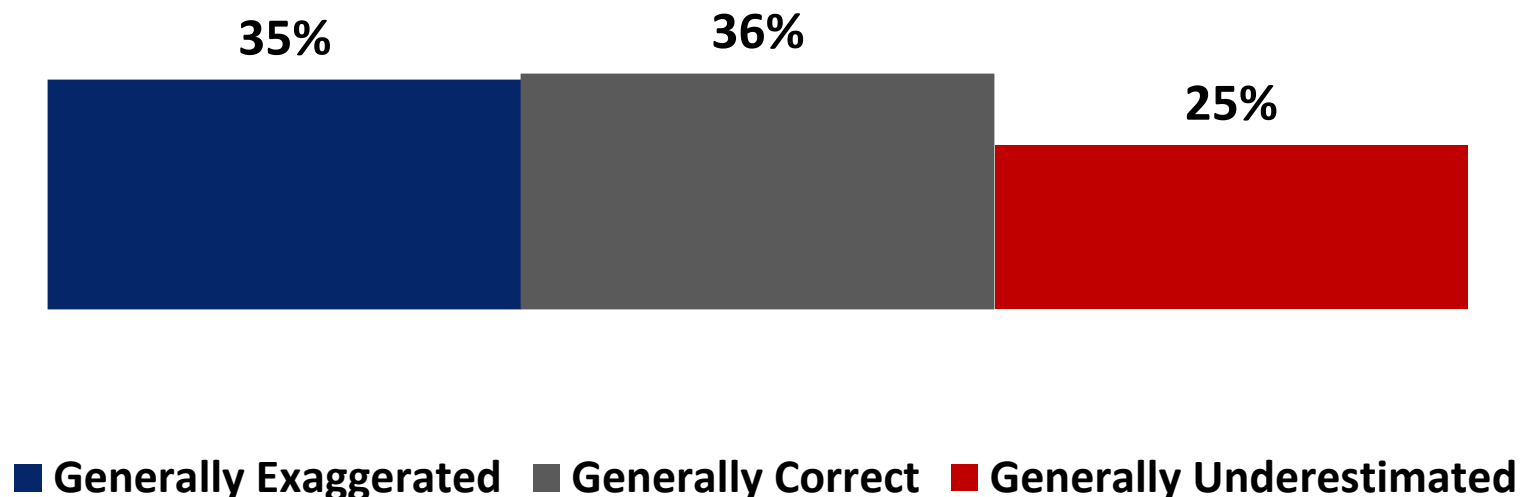
# A majority of Americans believe there are risks for the below activities (though the degree of risk varies).

*Thinking about your own health, how much of a risk do you think (ACTIVITY) are to you or someone in your household: A major risk, a minor risk, or no risk at all?*



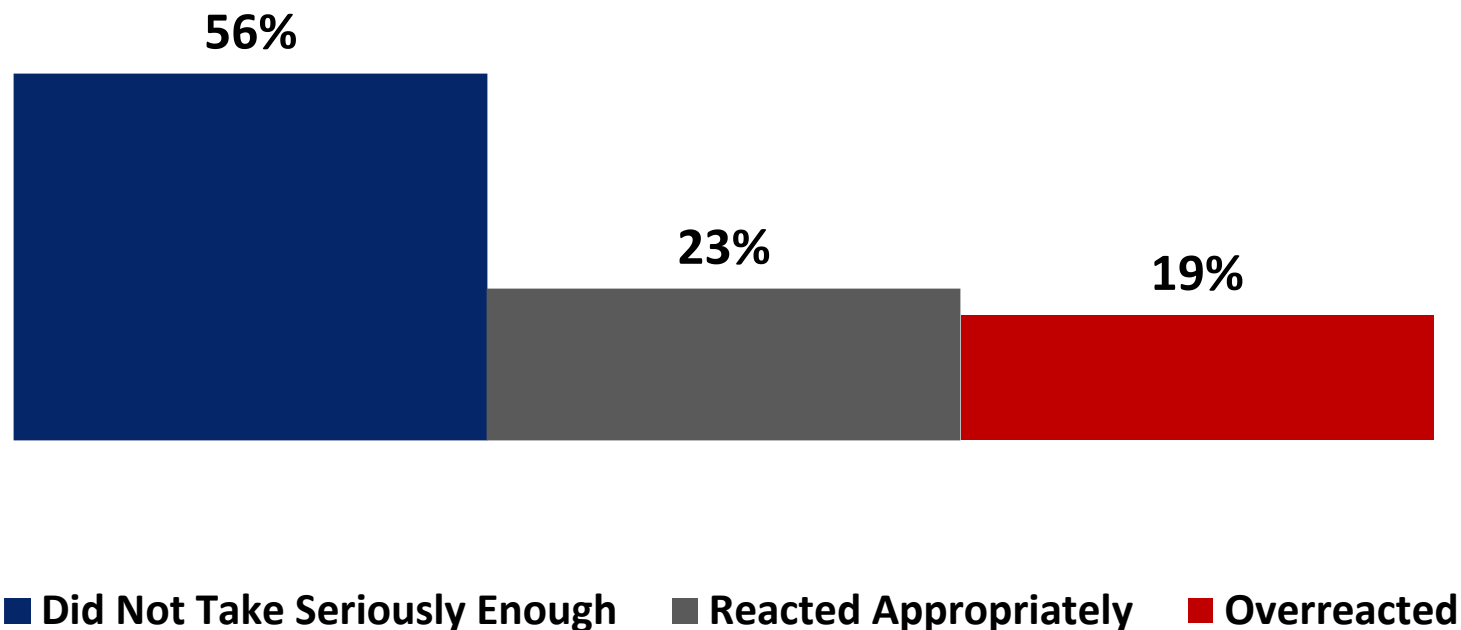
# Americans are divided over whether what is reported in the news about coronavirus is exaggerated, correct, or underestimated.

*Thinking about what is said in the news, in your view is the seriousness of coronavirus generally exaggerated, generally correct, or is it generally underestimated?*



# A slight majority of Americans believe the country did not take the threat of coronavirus seriously enough.

*Overall, do you think the country overreacted to the threat posed by coronavirus, reacted appropriately, or did the country not take the threat seriously enough?*



# While a sizable majority of Americans continue to support certain health protocols to mitigate the spread of the coronavirus...

July 16-20 → December 7-9

**75%**      **75%**

Strongly/Somewhat Support Requiring Americans To Wear Face Masks When They're Around Other People Outside Their Homes

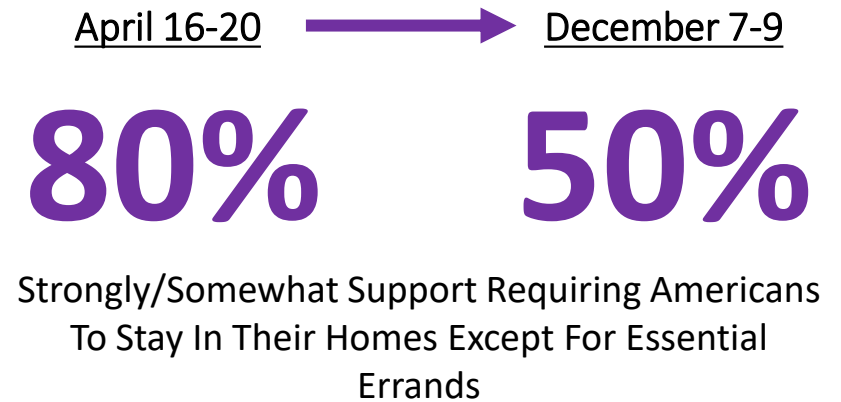
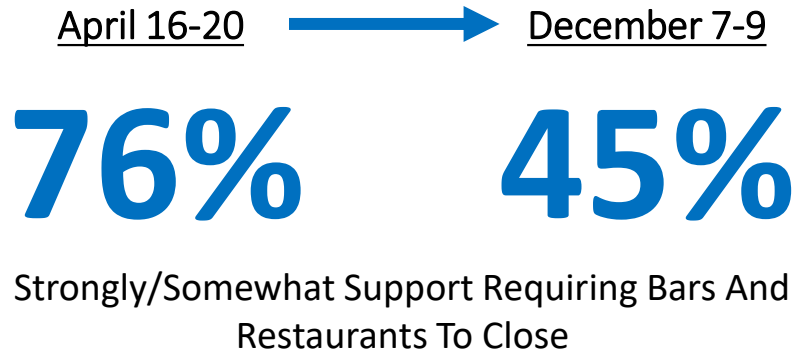
April 16-20 → December 7-9

**82%**      **66%**

Strongly/Somewhat Support Requiring Americans To Limit Gatherings To 10 People Or Fewer



...a large number of Americans are growing weary of other measures.

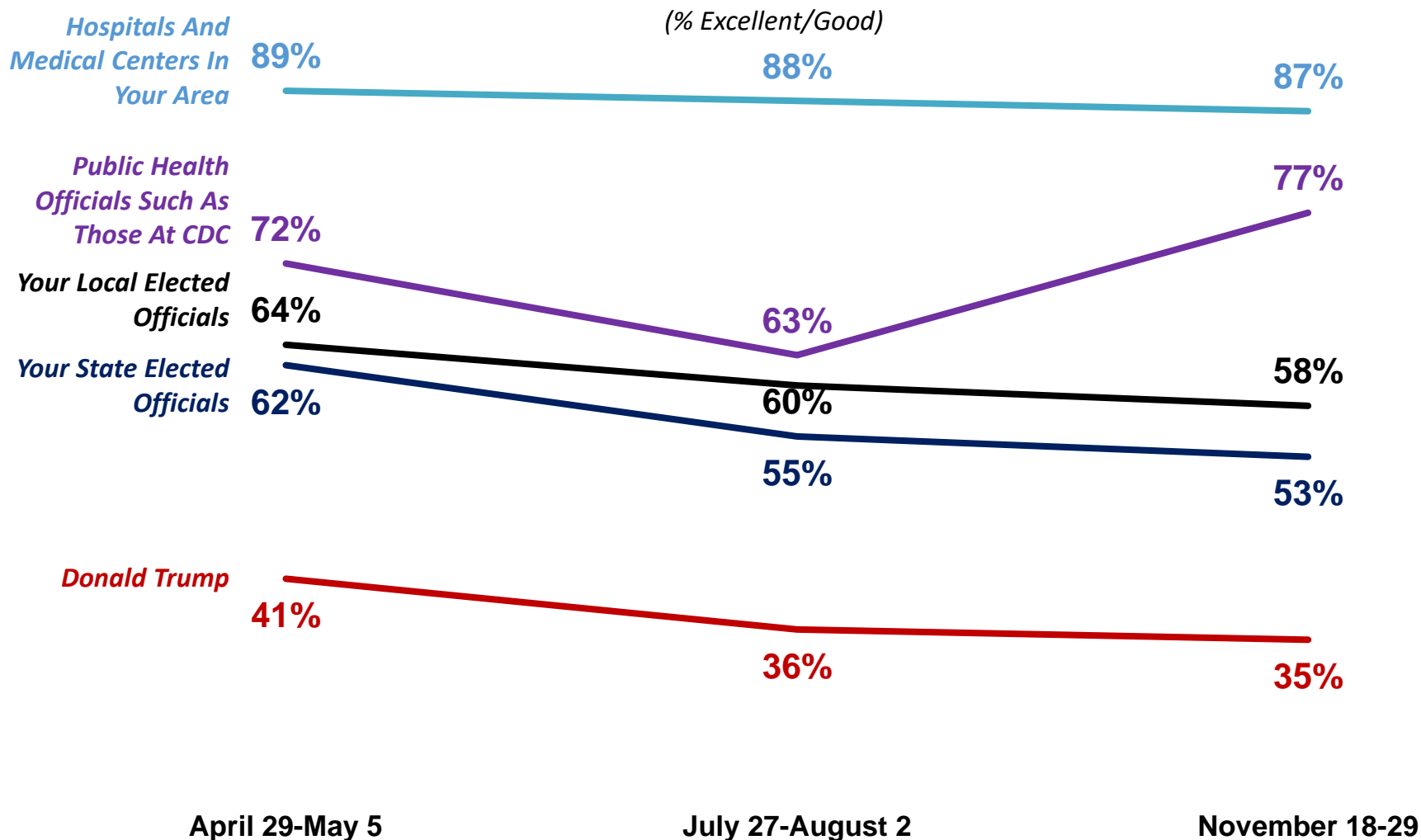


**62%**

Support In-Person Schooling For Elementary And Secondary Students In Their Community Right Now

# Americans continue to rate how hospitals/medical centers have handled the pandemic extraordinarily high.

How would you rate the job each of the following is doing responding to the coronavirus outbreak?

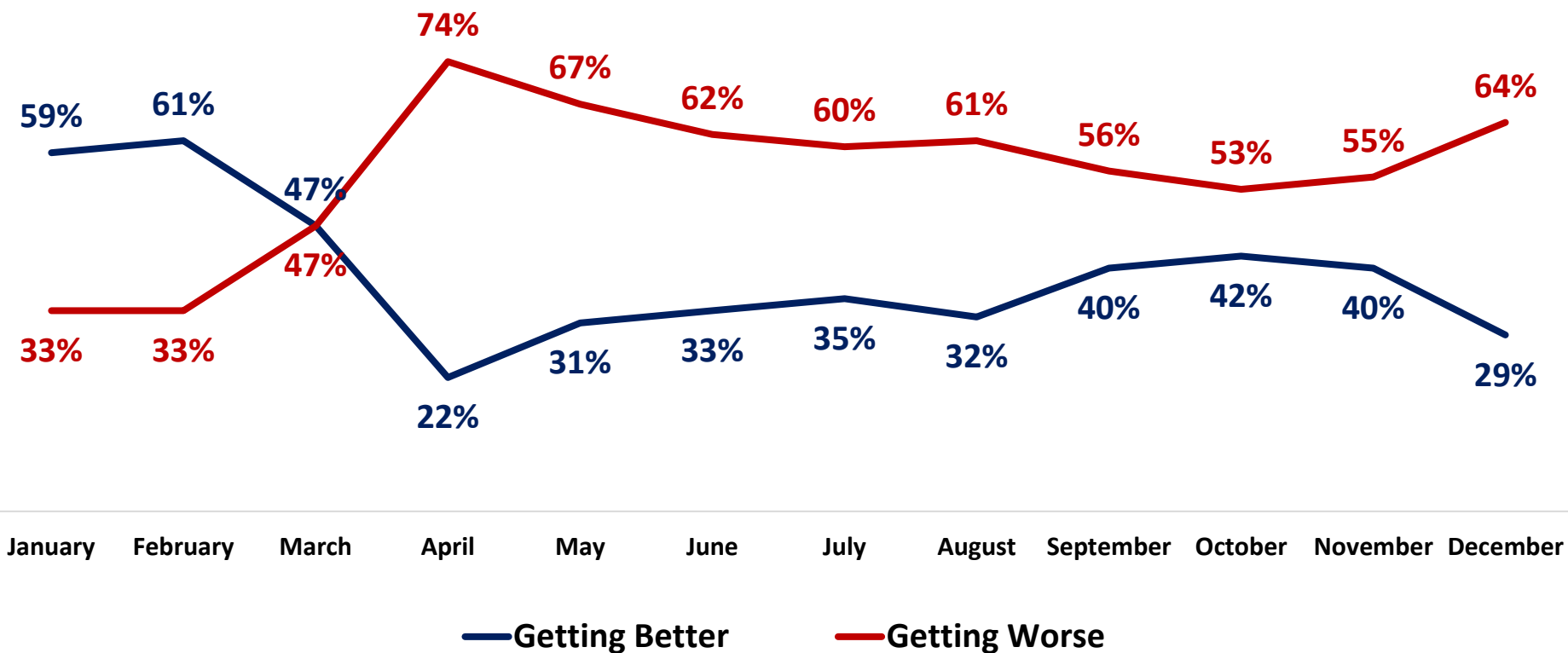




## II. COVID-19 & The Economy

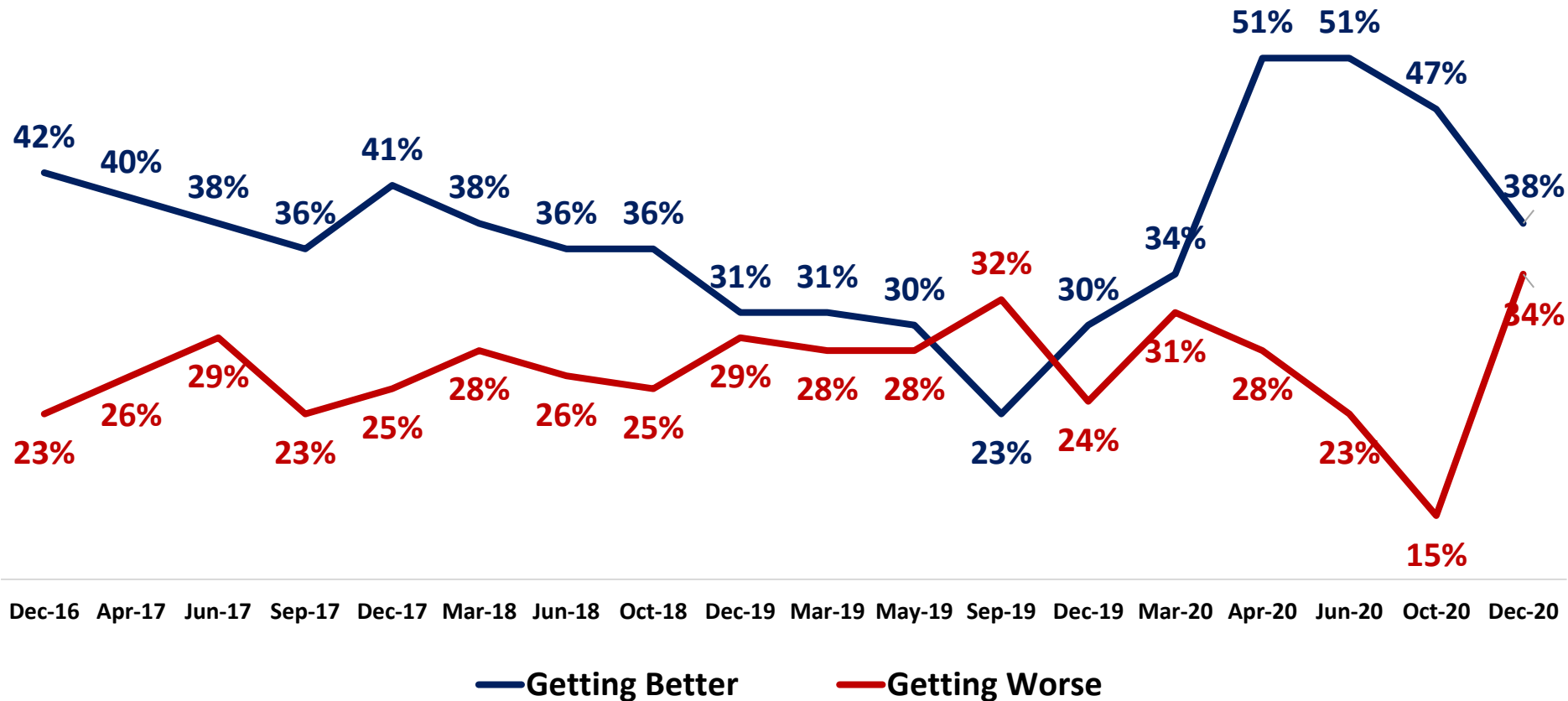
# Attitudes about the U.S. economy, which had been slowly but steadily improving, soured between November and December.

*Right now, do you think that economic conditions in the country as a whole are getting better or getting worse?*



# And expectations about future economic conditions have deteriorated as well...

And over the course of the next year, do you think the state of the economy will get better, stay about the same, or get worse?



...although future expectations about the economy may have been impacted by the election.

*And over the course of the next year, do you think the state of the economy will get better, stay about the same, or get worse?*

*(% Will Get Better)*

|                     | December 2019 | April 2020 | June 2020  | October 2020 | December 2020 | Net Difference (Dec-Oct) |
|---------------------|---------------|------------|------------|--------------|---------------|--------------------------|
| <b>Overall</b>      | <b>30%</b>    | <b>51%</b> | <b>51%</b> | <b>47%</b>   | <b>38%</b>    | <b>-9%</b>               |
| <b>Republicans</b>  | <b>53%</b>    | <b>73%</b> | <b>73%</b> | <b>65%</b>   | <b>18%</b>    | <b>-47%</b>              |
| <b>Independents</b> | <b>26%</b>    | <b>45%</b> | <b>51%</b> | <b>44%</b>   | <b>39%</b>    | <b>-5%</b>               |
| <b>Democrats</b>    | <b>12%</b>    | <b>39%</b> | <b>34%</b> | <b>34%</b>   | <b>59%</b>    | <b>+25%</b>              |

# While news of the coronavirus vaccine has sparked economic optimism, news of the latest surge has sparked economic pessimism.

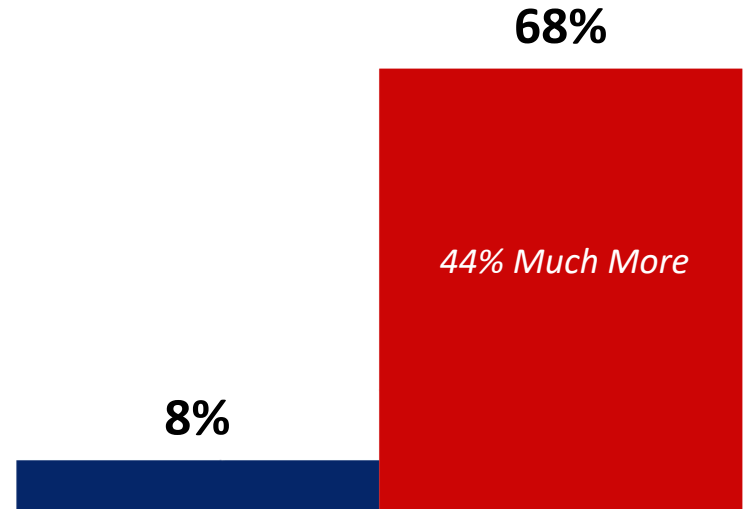
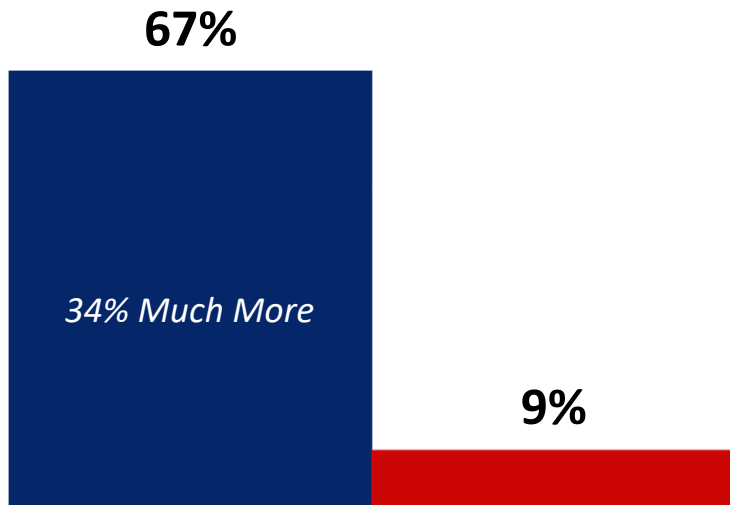
*I'm going to read you a few recent events. For each one, tell me how this has affected your view of the economy--has it made you feel much more positive, somewhat more positive, somewhat more negative, or much more negative, or has it not affected your view of the economy either way?*

**News that effective vaccines for the coronavirus have been developed**

**The recent surge in the spread of the coronavirus**

**+58**

**-60**

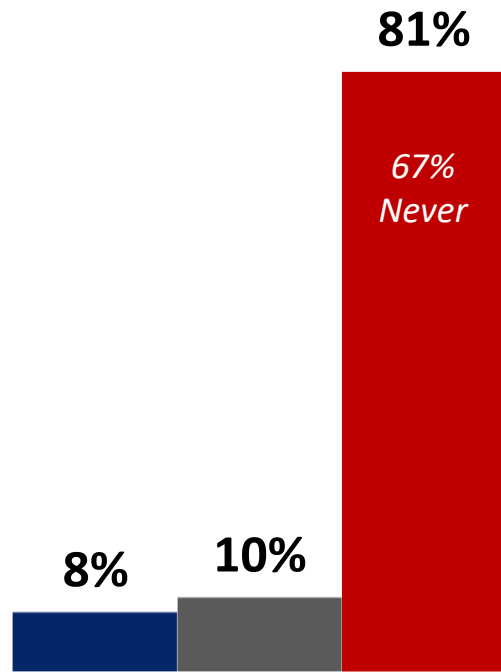


■ More Positive About The Economy

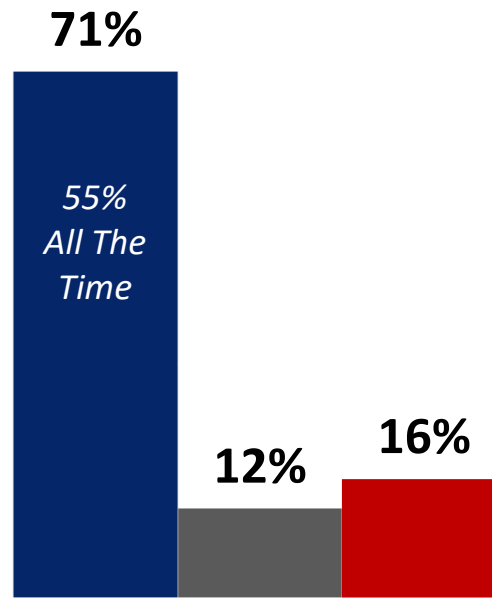
■ Less Positive About The Economy

# The work environment changed for many in 2020 – but just slightly more than one-quarter of Americans want to work from home permanently post-COVID.

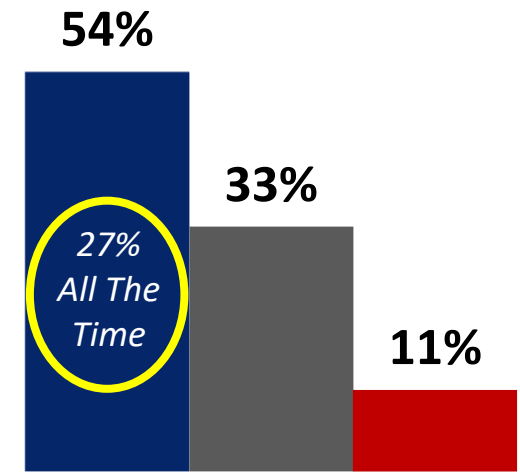
Before the coronavirus outbreak, did you work from home...\*



Are you currently working from home...^



Looking ahead to when the coronavirus outbreak is over, if you had a choice, would you want to work from home...^



■ All/Most Of The Time

■ Some Of The Time

■ Rarely/Never

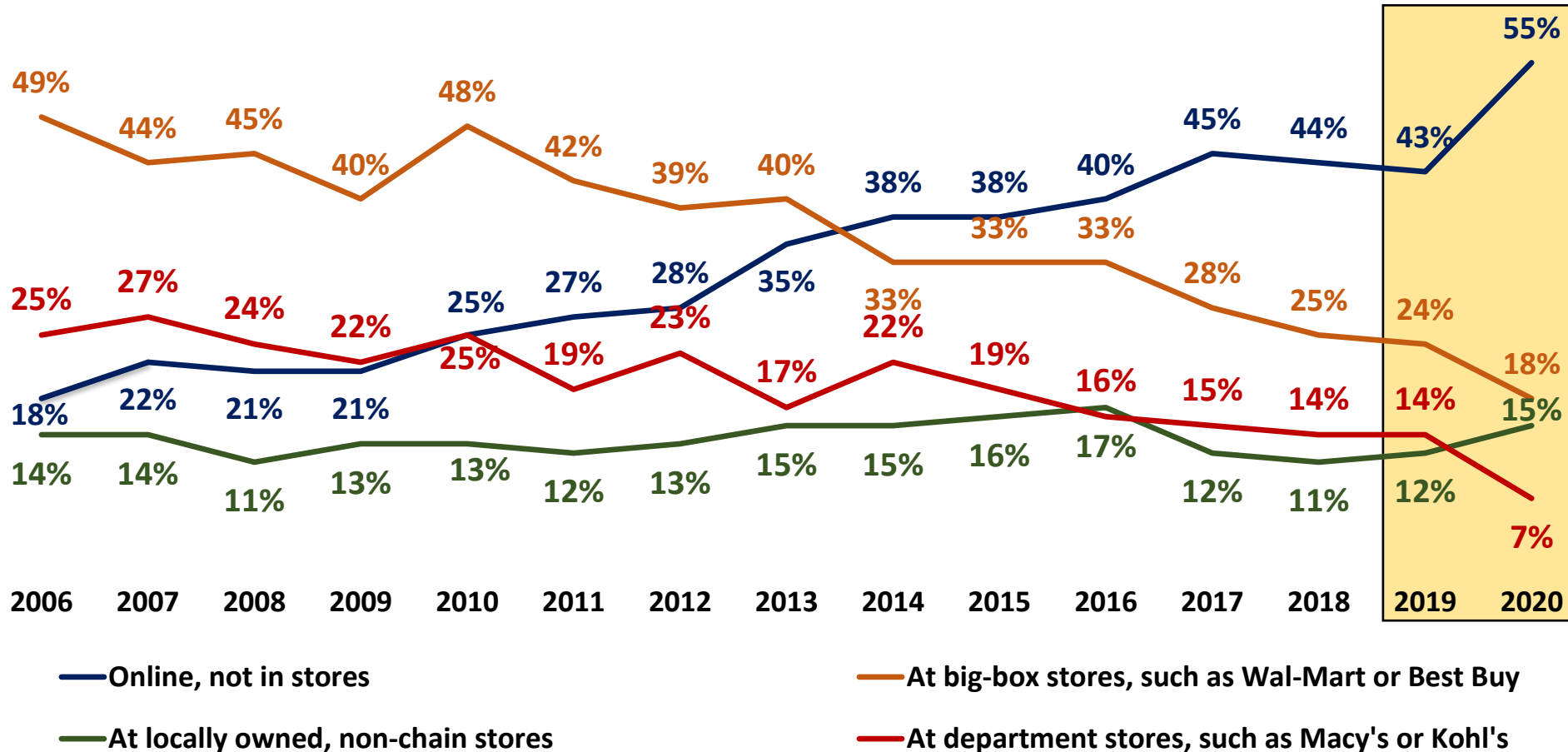
\*Asked if employed

^Asked if employed and can work from home



# The coronavirus pandemic has markedly accelerated the trend of online holiday shopping.

*In which one or two of the following ways have you already done or plan to do most of your holiday shopping?*



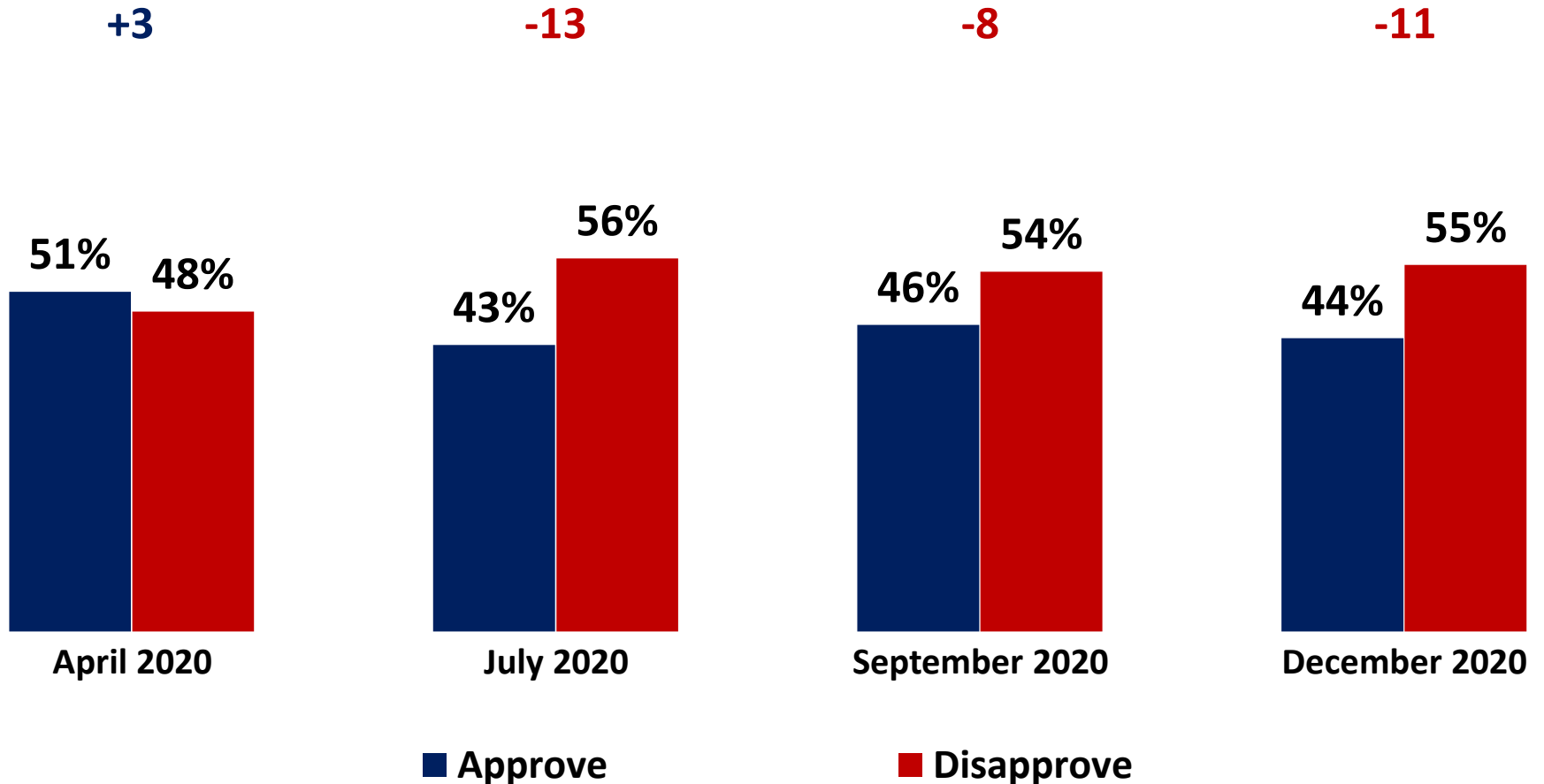


### *III. COVID-19 & Politics*

# President Trump: Job Approval On Coronavirus

Do you approve or disapprove of the way each of the following have responded to the coronavirus pandemic?

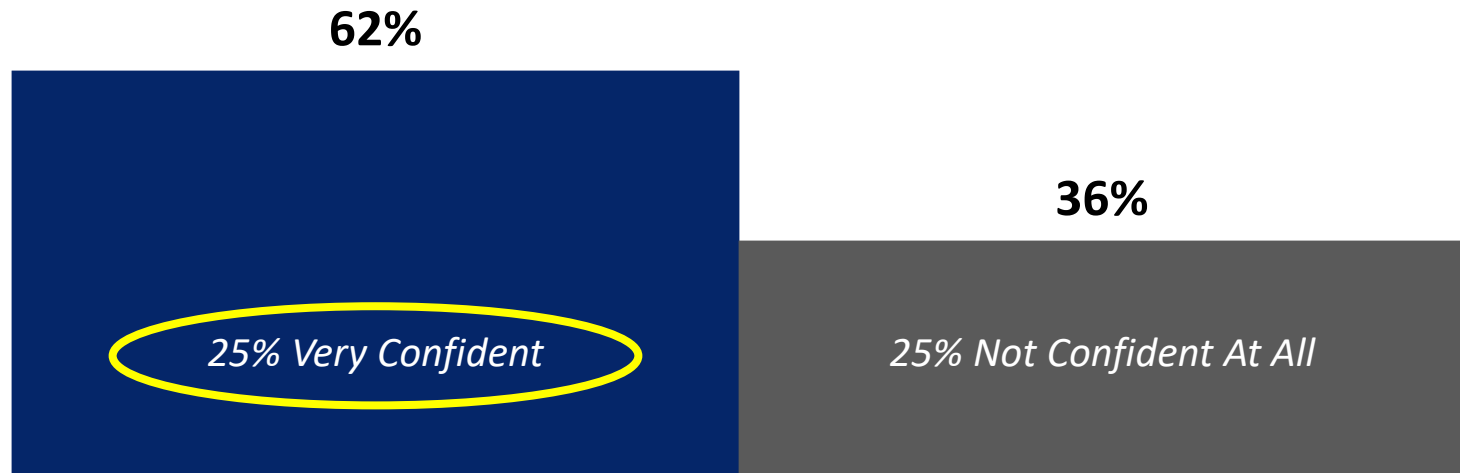
## President Donald Trump



# More than 6-in-10 Americans say they are confident in Joe Biden to handle the coronavirus (though the intensity is soft).

*Are you very confident, confident, not too confident, or not confident at all in Joe Biden's ability to handle the coronavirus as president?*

**+26**



■ **Total Confident**

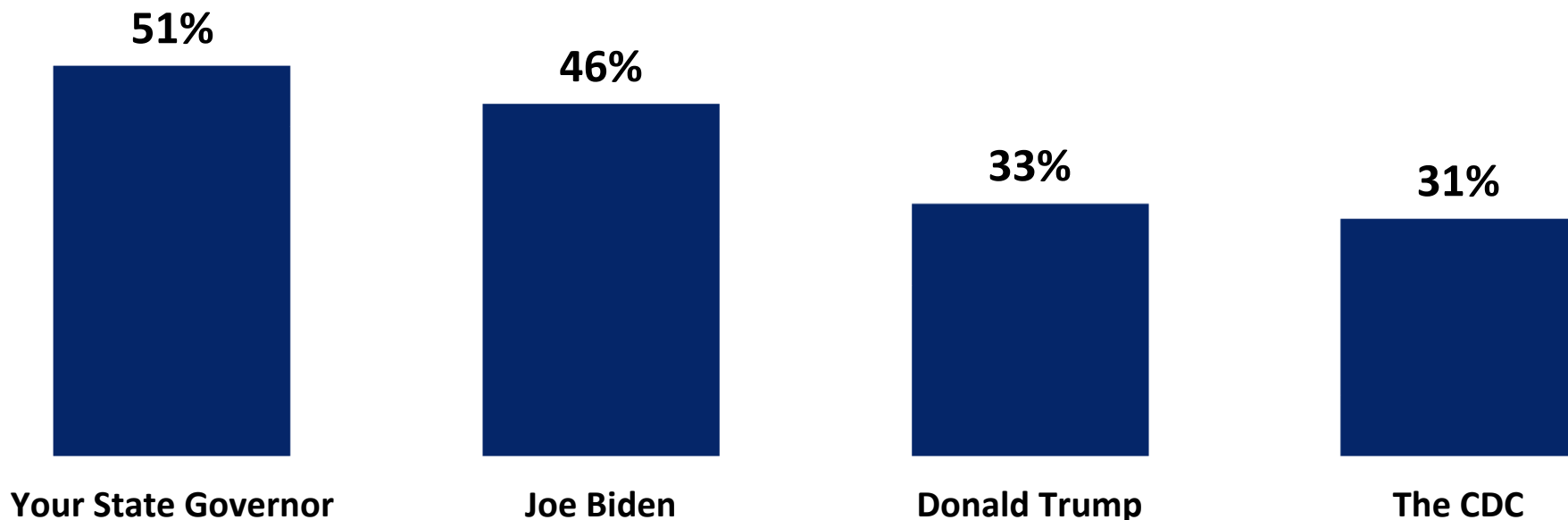
■ **Total Not Confident**

# Governors receive the highest grade on communicating a clear plan of action in response to the coronavirus.

*Please think about the recent impact of the coronavirus on your life when responding to the following and indicate your level of agreement or disagreement that each has communicated a clear plan of action in response to the coronavirus.*

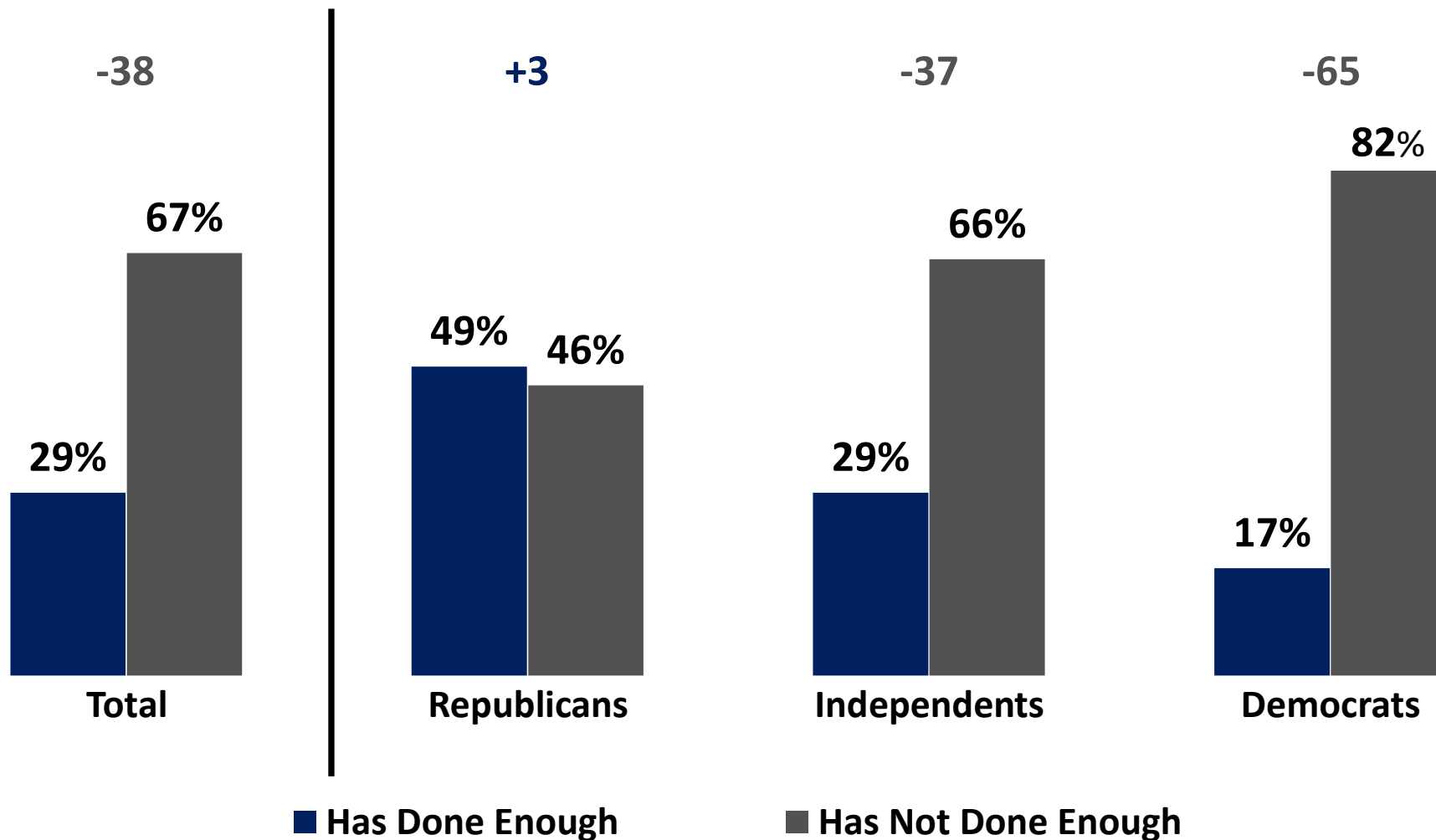
*(1=Strongly Disagree, 5=Strongly Agree)*

**% '4-5'**



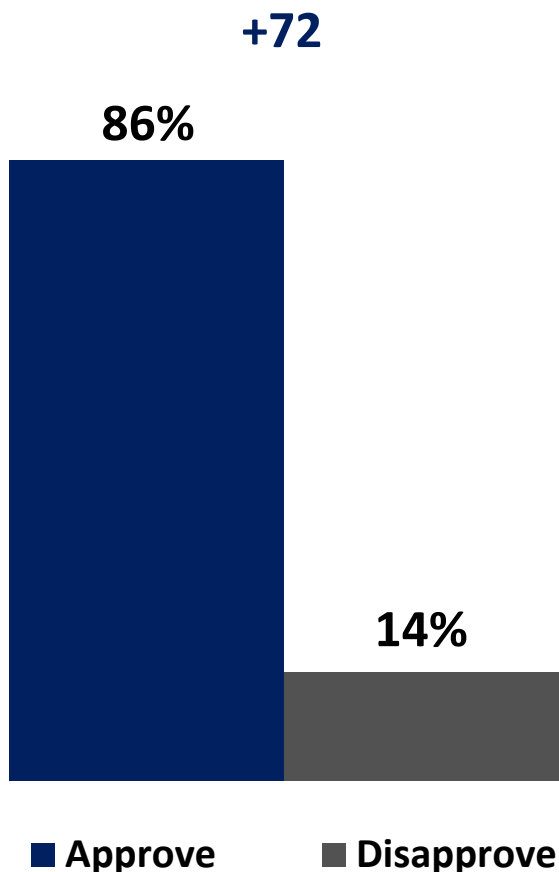
# Two-thirds of Americans do not believe the federal government has done enough to provide economic relief during the pandemic...

Do you think the federal government has done enough or not done enough to provide economic relief during the coronavirus pandemic?

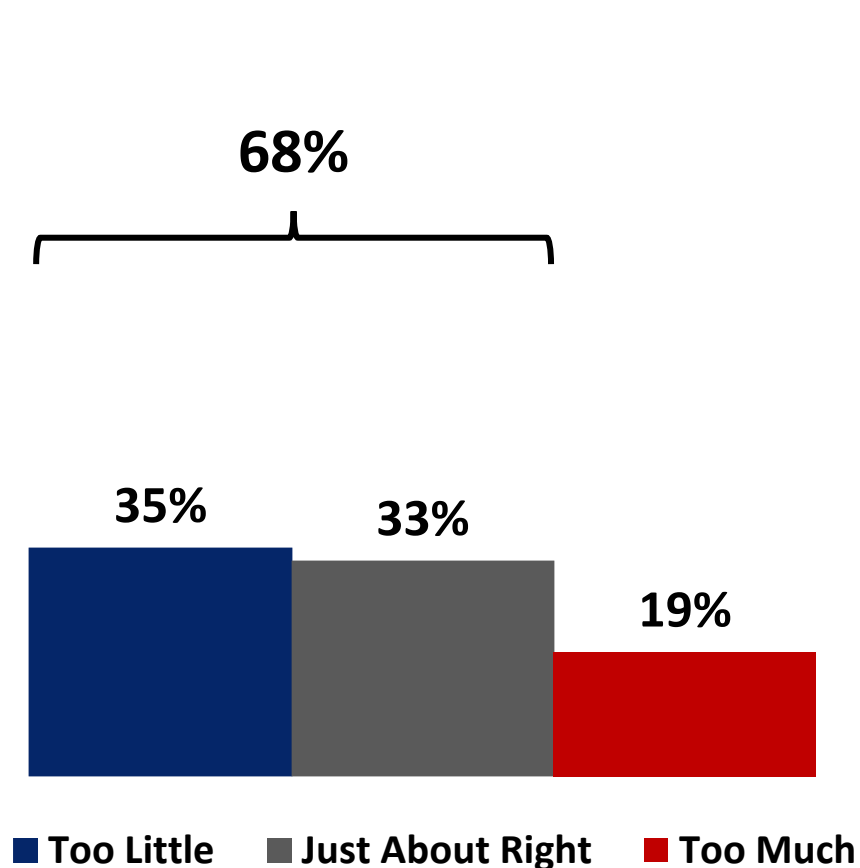


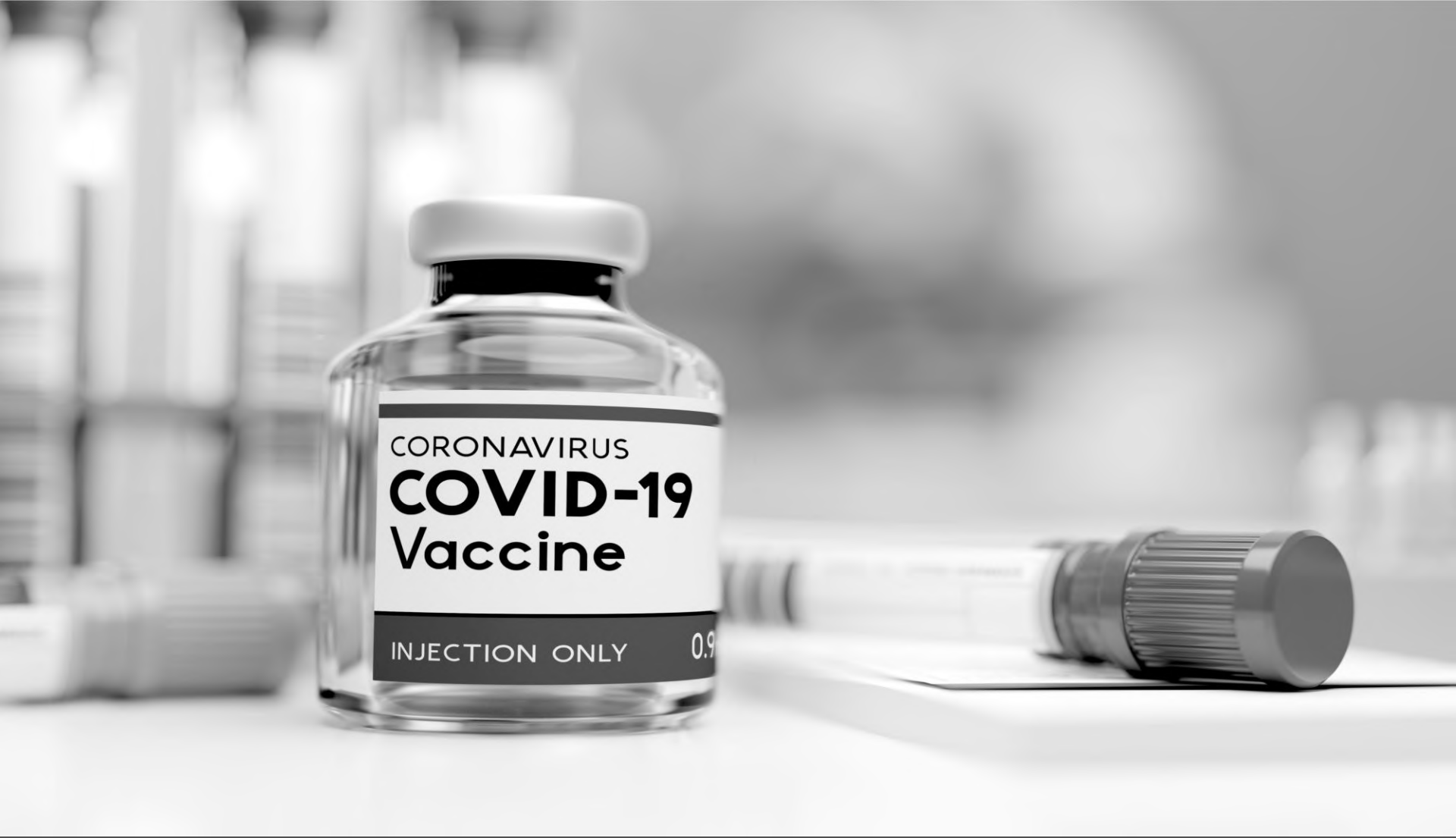
...which helps explain the strong support for another economic relief bill. More than 8-in-10 support another bill (and more than two-thirds say the current bill is either “too little” or “just about right”).

*Would you approve or disapprove of Congress passing an additional economic relief package that would provide funds to people and businesses impacted by the coronavirus outbreak?*



*Do you think the nine hundred billion dollar relief package currently being considered by Congress to deal with the economic effects of the coronavirus pandemic is too much, just about right, or too little?*





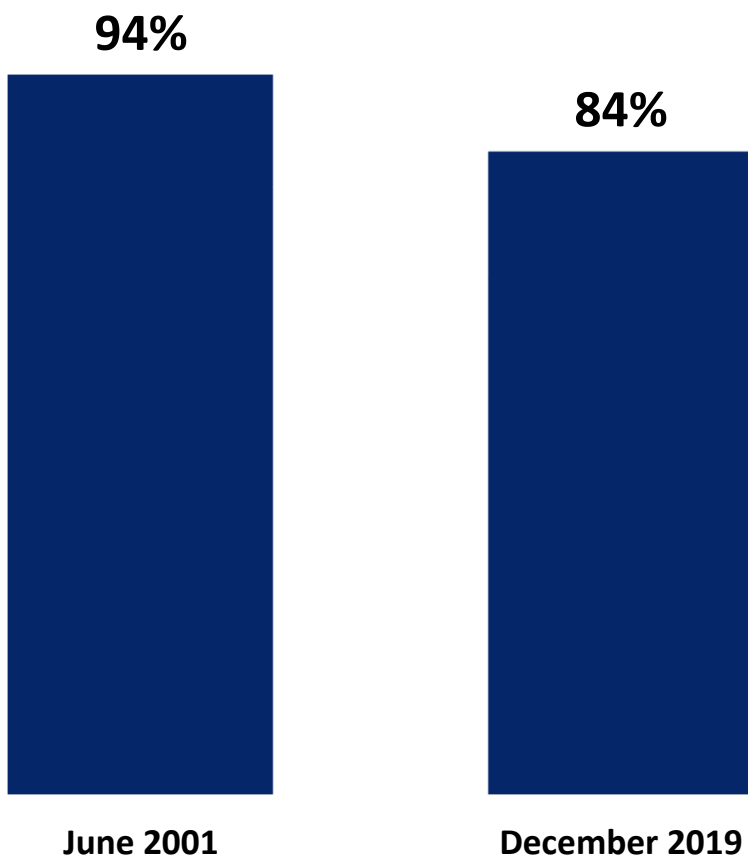
## *IV. COVID-19 Vaccine*



# There has been some erosion in attitudes about the importance of vaccines across the U.S. over the last few decades.

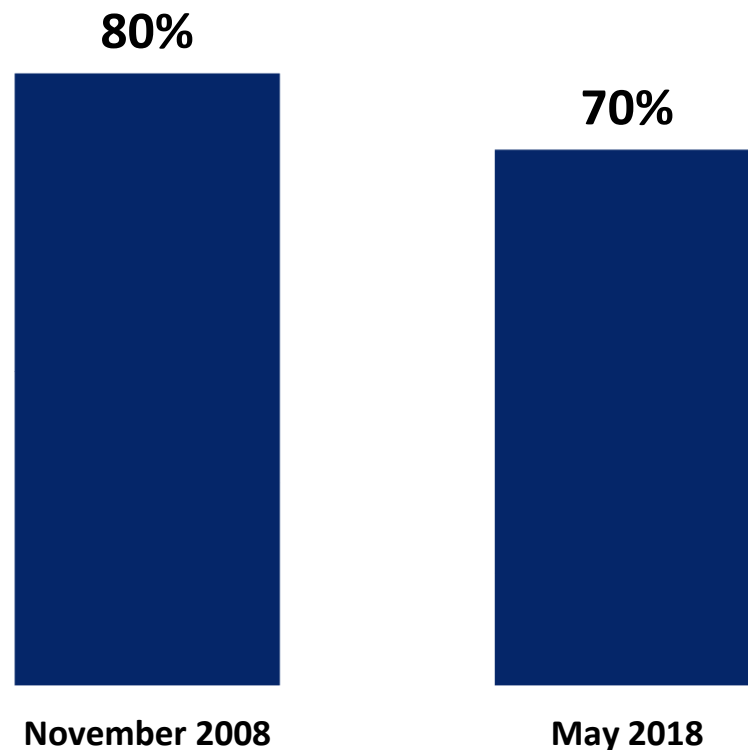
*How important is it that parents get their children vaccinated?*

*(% Extremely/Very Important)*



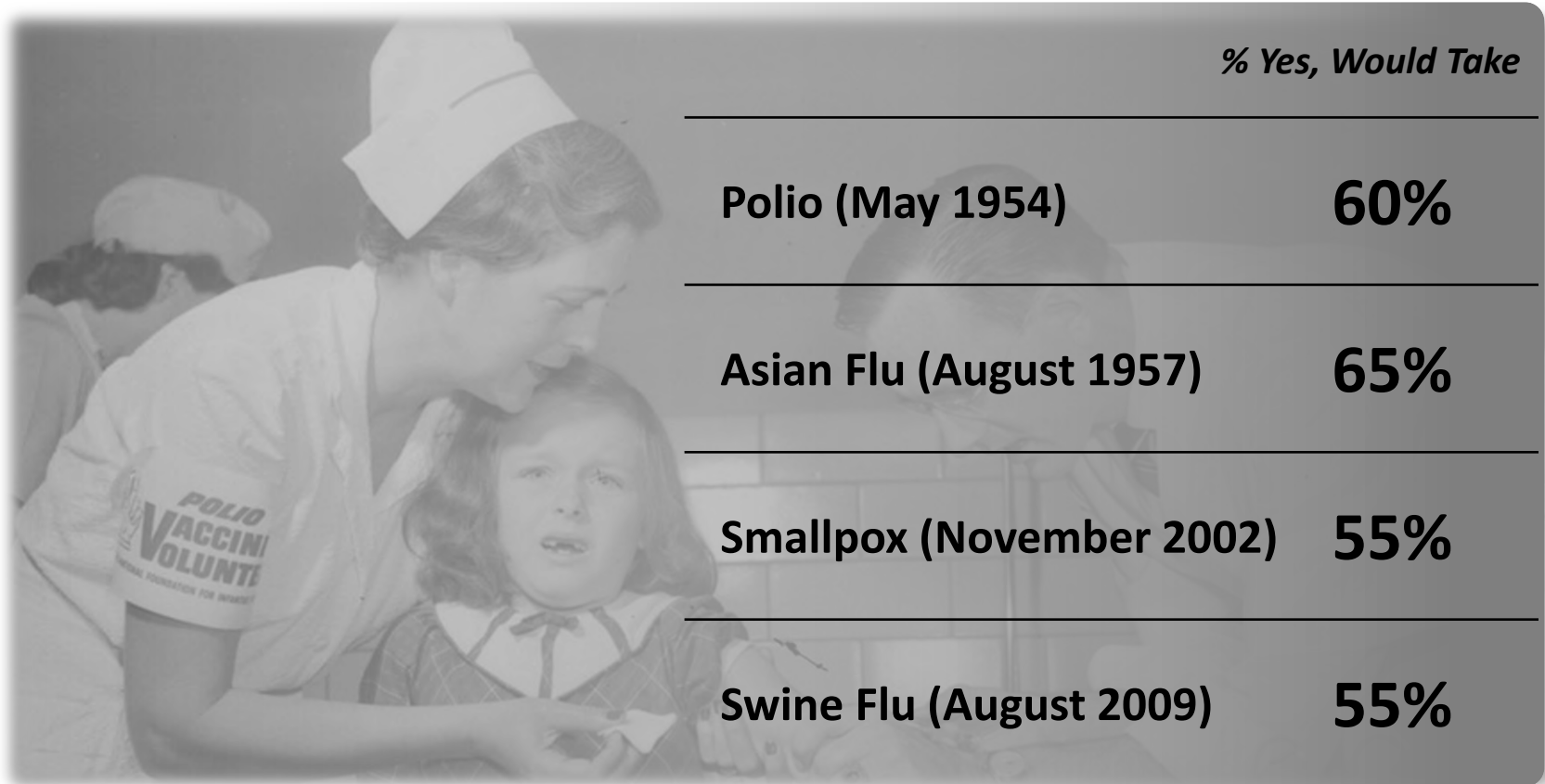
*Thinking about the common vaccines available today such as polio, tetanus, measles, and flu, how important do you believe vaccines are to the health of our society today?*

*% Very Important*



# New vaccines often meet skepticism.

## *Initial Reactions to Taking New Vaccines*



# 1956 or 1976?

Elvis Presley Receiving the Polio Vaccine  
on *The Ed Sullivan Show*

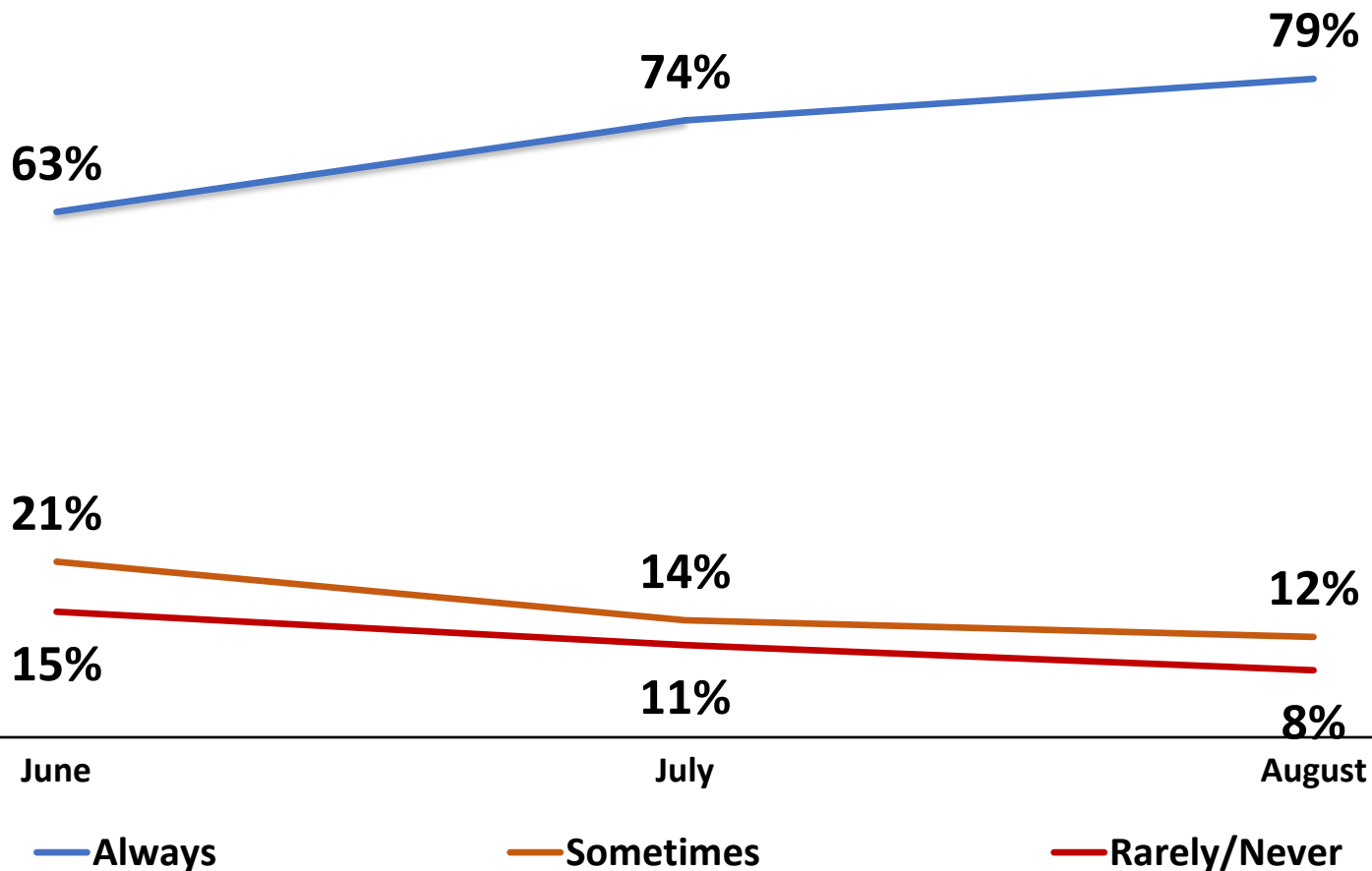


President Gerald Ford Receiving  
the Swine Flu Vaccine in 1976



# We have a recent precedent for building adoption of mitigation strategies - mask adoption clearly grew over the summer.

*Due to the coronavirus, how often, if at all, do you wear a mask to go shopping, to work, or be around other people outside of your house?*

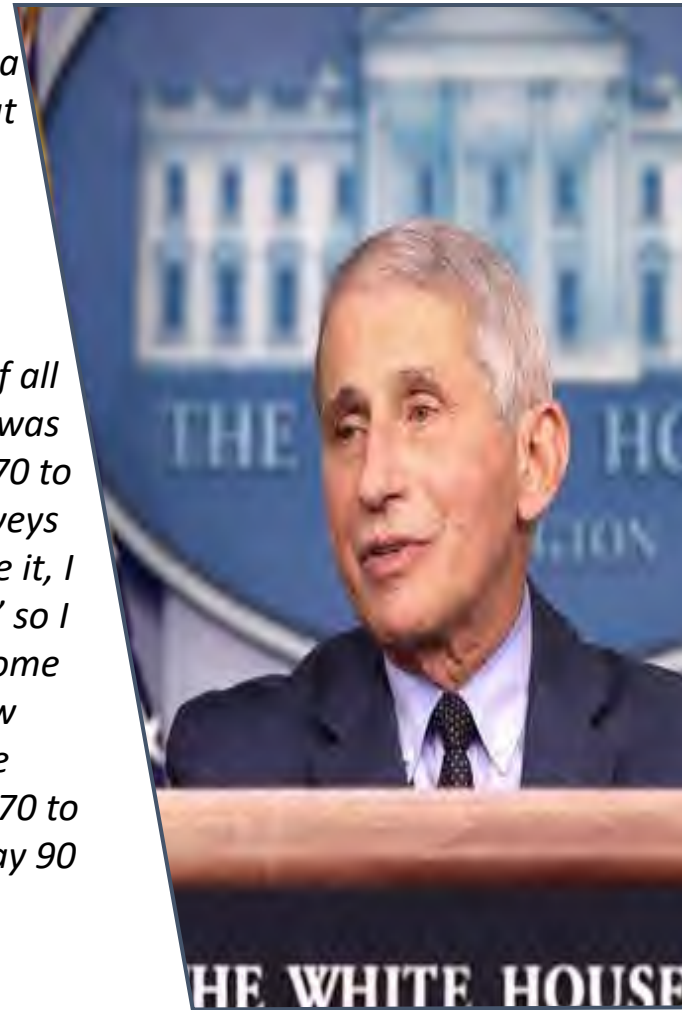


# What Is Our Target?



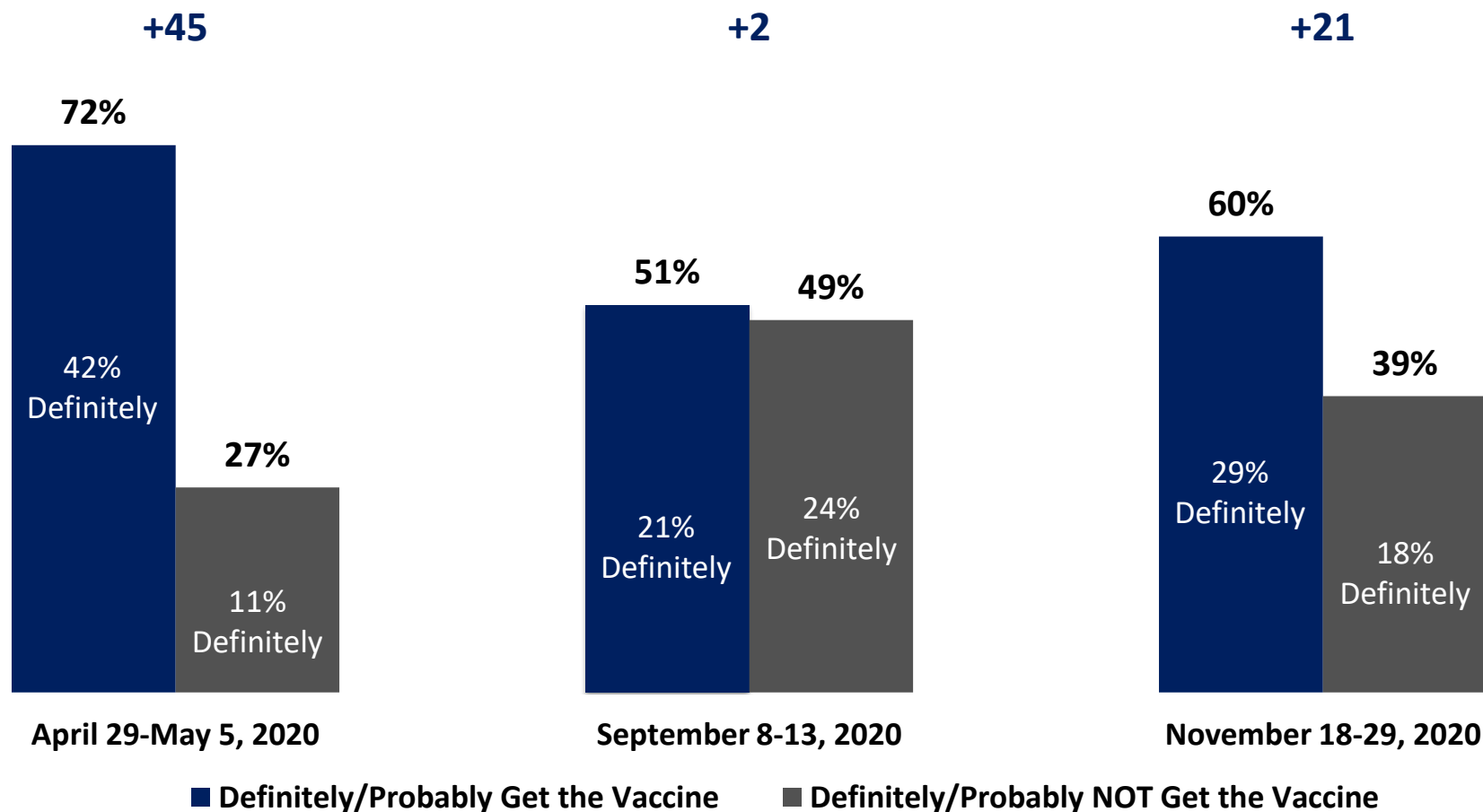
*“You don’t need to vaccinate 80% of the public. If you get to 50% that is going to be a pretty effective target – anything above that is additional benefit.”* Scott Gottlieb, M.D.  
(December 7, 2020)

*“When polls said only about half of all Americans would take a vaccine, I was saying herd immunity would take 70 to 75 percent. Then, when newer surveys said 60 percent or more would take it, I thought, ‘I can nudge this up a bit,’ so I went to 80, 85. We need to have some humility here. We really don’t know what the real number is. I think the real range is somewhere between 70 to 90 percent. But, I’m not going to say 90 percent.”* Anthony Fauci, M.D.  
(December 17, 2020)



# Overall willingness to take the COVID-19 vaccine has increased since September.

*If a vaccine to prevent COVID-19 were available today, would you...*





# The percent of Americans who would take it right away has increased by eleven-points since October.

*When a vaccine for the coronavirus is available, which best describes what you will do...*

|   | October<br>2020 (1) | December<br>2020 (2) |
|---|---------------------|----------------------|
| <i>You will take the vaccine as soon as you can</i>   | <b>20%</b>          | <b>31%</b>           |
| <i>You will wait until it has been available for a while to see if there are major problems or side effects</i> | <b>50%</b>          | <b>37%</b>           |
| <i>You will get the vaccine eventually, but only if you are required to do so</i>                               | <b>10%</b>          | <b>12%</b>           |
| <i>You will not take the vaccine</i>  | <b>17%</b>          | <b>18%</b>           |

Source: (1) NBC News/Wall Street Journal National Survey of 1,000 Registered Voters, Conducted Oct 9-12, 2020

(2) Source: CNBC National Survey Of 800 Adults, Conducted December 4-7, 2020

# Older Americans are much more ready to take the shot, while people of color are more likely to see how things go and Republicans are more resistant.

*When a vaccine for the coronavirus is available, which best describes what you will do...*

| Early Adopters of the Vaccine (31%) |     |
|-------------------------------------|-----|
| Ages 65+                            | 55% |
| Men Ages 50+                        | 45% |
| Retirees                            | 45% |
| Postgraduates                       | 45% |
| Upper Class/Well-to-do              | 42% |
| Democrats                           | 41% |
| Whites                              | 37% |
| Women Ages 50+                      | 36% |
| Midwest Region                      | 36% |
| College Graduates                   | 36% |

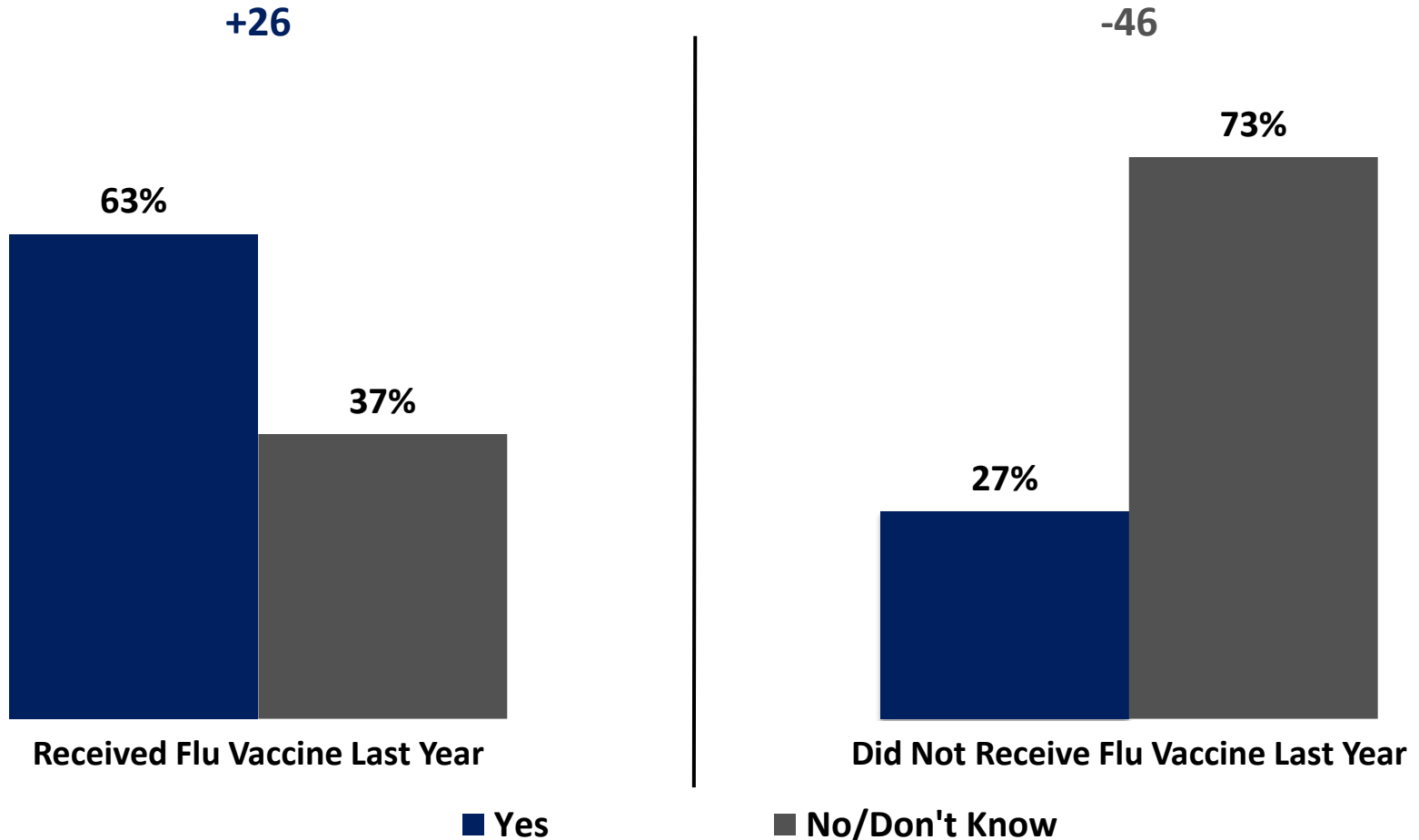
| Fence-sitters (37%)   |     |
|-----------------------|-----|
| Independents          | 49% |
| Non-liberal Democrats | 45% |
| People of Color       | 44% |
| Urban Residents       | 44% |
| Ages 18-34            | 43% |
| Income <\$30K         | 43% |
| Women Ages 18-49      | 42% |

| Resisters (30%)    |     |
|--------------------|-----|
| Republicans        | 40% |
| Blue Collar Worker | 40% |
| Rural              | 40% |
| 35-49              | 38% |



One of the most significant predictors of whether someone is willing to take the coronavirus vaccine is whether they took the flu vaccine last year.

Would you agree to be vaccinated with the COVID vaccine?



# Concern about side effects is the top reason Americans cite for unwillingness to take the vaccine.

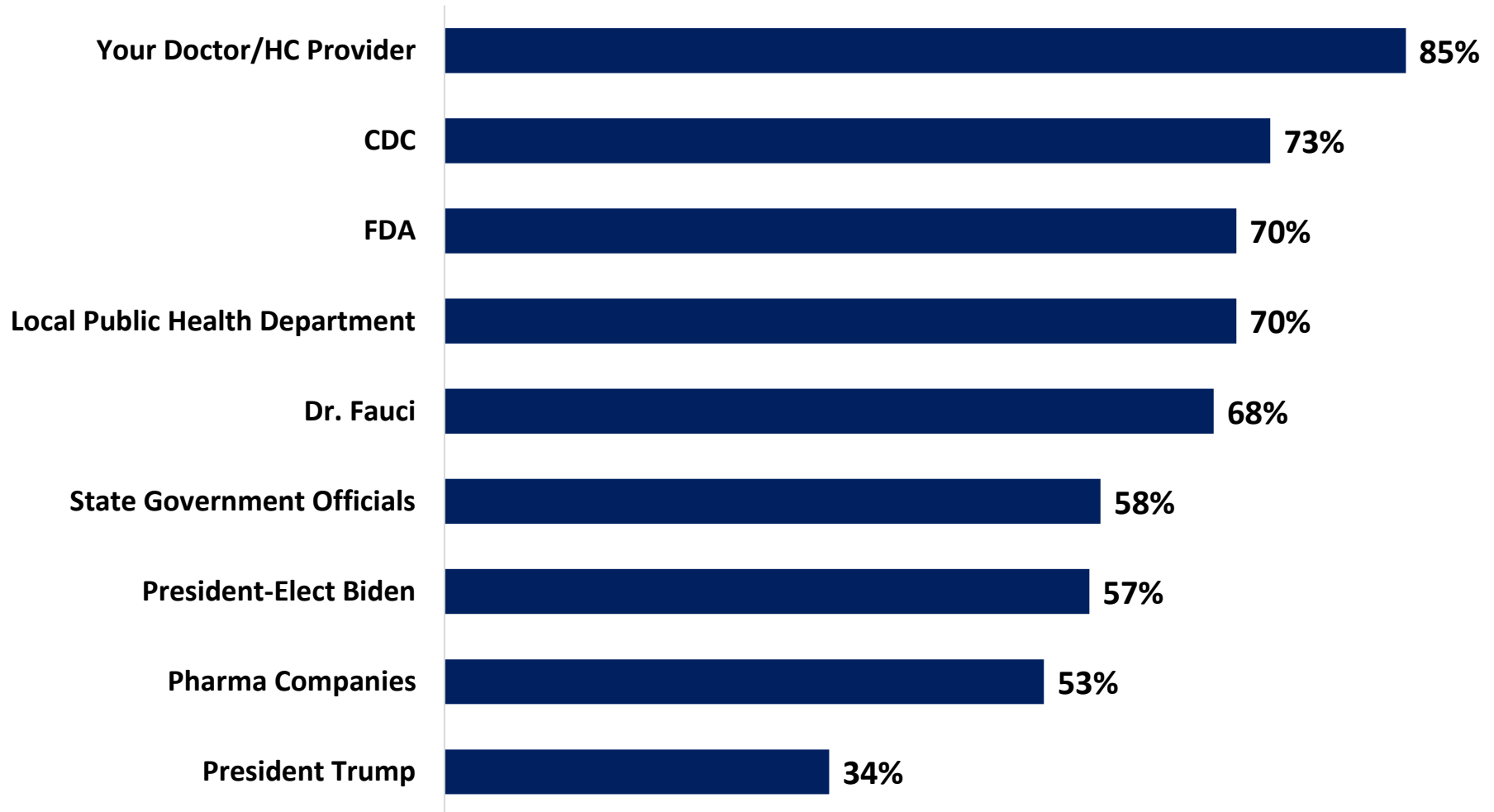
Please tell me if each of the following is a major reason, a minor reason, or not a reason why you would NOT get a COVID-19 vaccine?

*(Among those who would definitely/probably not get a vaccine)*

|  | Major Reason | Total Reason |
|--|--------------|--------------|
| <i>You are worried about possible side effects</i>                                       | <b>59%</b>   | <b>81%</b>   |
| <i>You do not trust the government to make sure the vaccine is safe and effective</i>    | <b>55%</b>   | <b>76%</b>   |
| <i>The vaccine is too new and you want to wait and see how it works for other people</i> | <b>53%</b>   | <b>69%</b>   |
| <i>Politics has played too much of a role in the vaccine development process</i>         | <b>51%</b>   | <b>71%</b>   |
| <i>The risks of COVID-19 are being exaggerated</i>                                       | <b>43%</b>   | <b>66%</b>   |
| <i>You don't trust vaccines in general</i>   | <b>37%</b>   | <b>62%</b>   |
| <i>You do not trust the health care system</i>   | <b>35%</b>   | <b>60%</b>   |
| <i>You are worried that you may get COVID-19 from the vaccine</i>                        | <b>27%</b>   | <b>48%</b>   |
| <i>You don't think you are at risk of getting sick from COVID-19</i>                     | <b>20%</b>   | <b>51%</b>   |

# Americans trust healthcare providers the most when it comes to information about the vaccine.

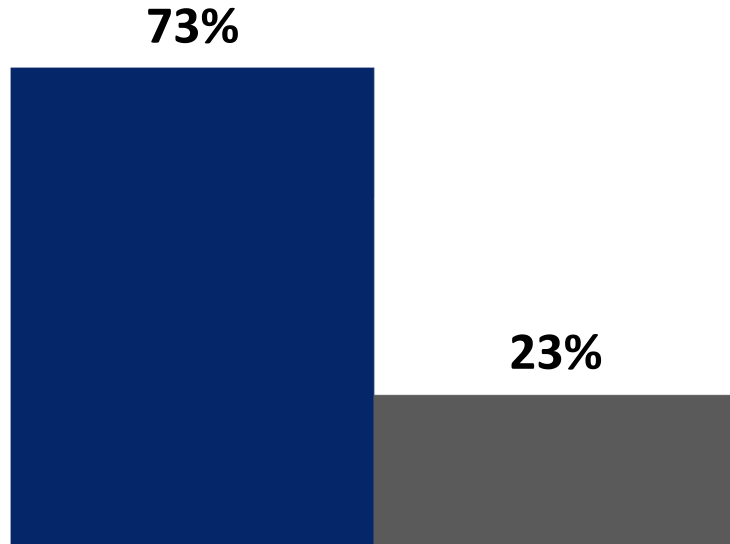
How much do you trust \_\_\_\_\_ to provide reliable information about a COVID-19 vaccine?



# While a majority of Americans believe wearing a mask is part of everyone's responsibility to protect others, they are divided when it comes to vaccines.

*Which comes closer to your view: wearing a mask to prevent the spread of COVID-19 is a personal choice or wearing a mask is part of everyone's responsibility to protect the health of others?*

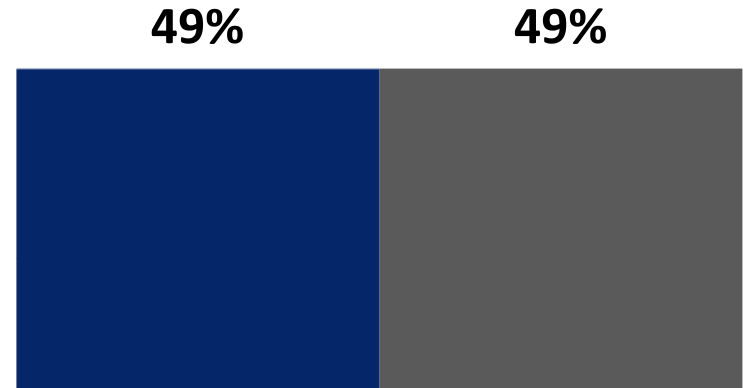
**+50**



**Wearing A Mask**

*Which comes closer to your view: getting vaccinated against COVID-19 is a personal choice or getting vaccinated is part of everyone's responsibility to protect the health of others?*

**-0-**



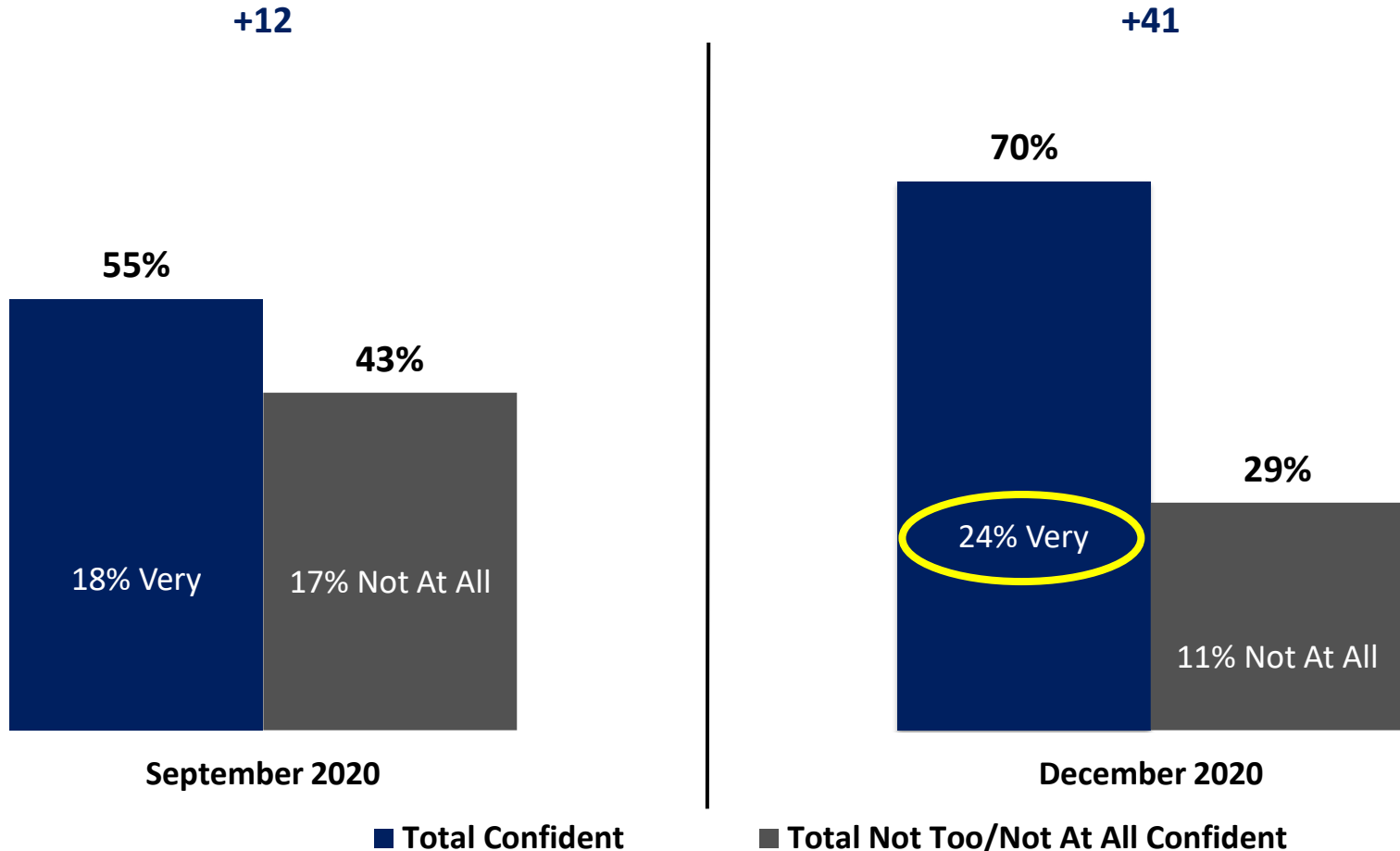
**Getting Vaccinated**

**■ Part of Everyone's Responsibility To Protect Health Of Others**

**■ Personal Choice**

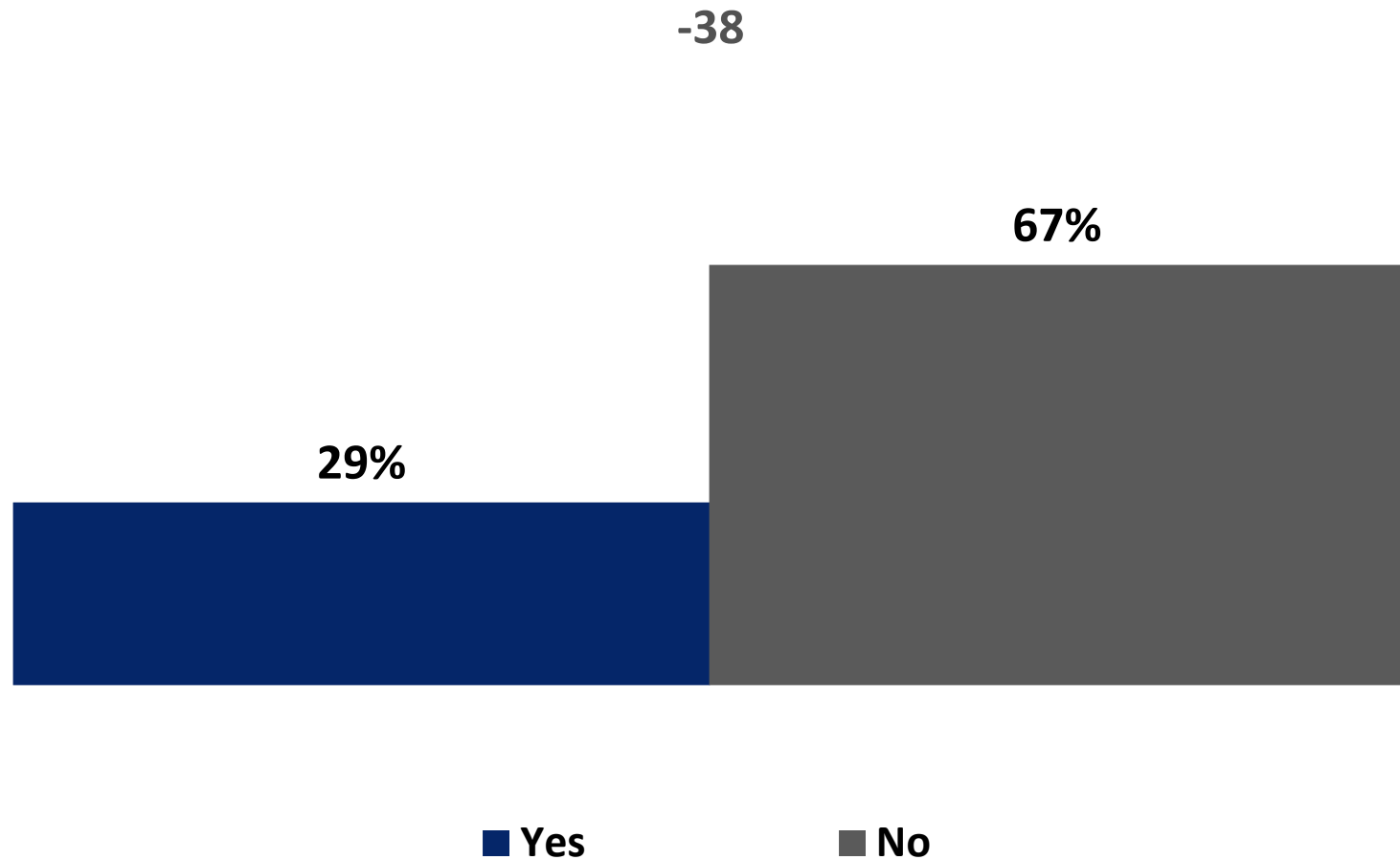
# 7-in-10 Americans are now confident the vaccine will have been properly tested when it becomes available (but note the soft intensity).

*How confident are you that when a coronavirus vaccine becomes available, it will have been properly tested for safety and effectiveness?*



# For now, a strong majority of Americans reject the idea of the vaccine being mandatory.

*If a COVID-19 vaccine is approved by government health officials, do you think your state should make it mandatory for people to get vaccinated, or not?*



# Potential Challenges Of Widespread Vaccine Adoption

## 1) More Politicization

## 2) Double Dose Logistics/Follow-Up

## 3) Timing Of Availability To The General Population

- Do we lose the sense of urgency when the vaccine begins to roll out to the general population (e.g., daily case counts are likely to be much lower than they are now and we are moving into Spring and back outside)?

## 4) Adverse Event

- Cutter Incident

Our estimate of 2021 COVID-19 vaccine adoption (in the U.S.)  
based on all of the data we have seen so far...

**40%**

Of Americans will take the vaccine without any persuasion necessary.

**35%**

Of Americans will need some persuasion. Some may require a little nudge; others will require more. *(Note, this does not mean that everyone who falls into this category will take the vaccine).*

**25%**

Will not take the vaccine in 2021.\*

\*Assuming there are no/minimal mandates in 2021.





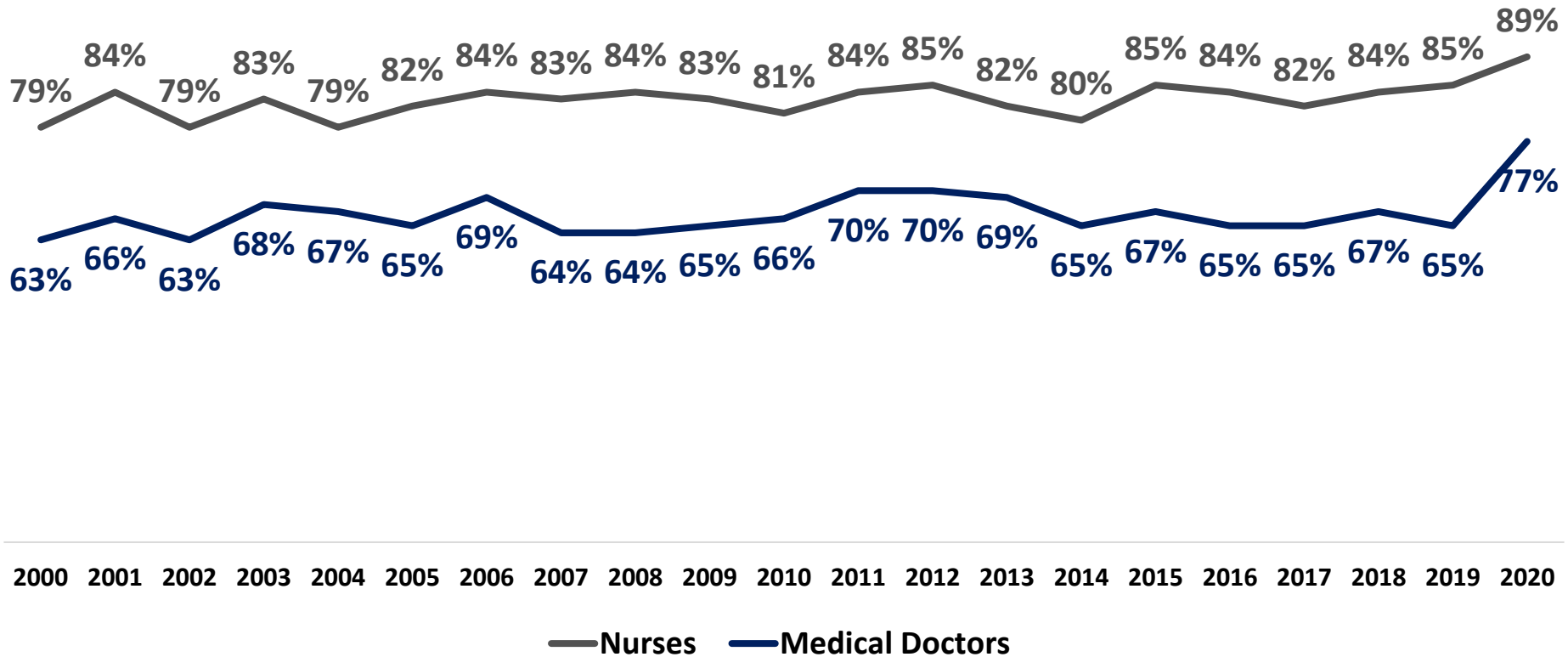
*V. COVID-19 & Attitudes Towards The U.S.  
Health Care System*

# What's Different?

# Honesty/ethical standard ratings of frontline health care workers are at an all-time high.

Please tell me how you would rate the honesty and ethical standards of people in these different fields -- very high, high, average, low or very low?

% Very/High



# Every other pressing health care issue has taken a backseat to COVID-19 this year.

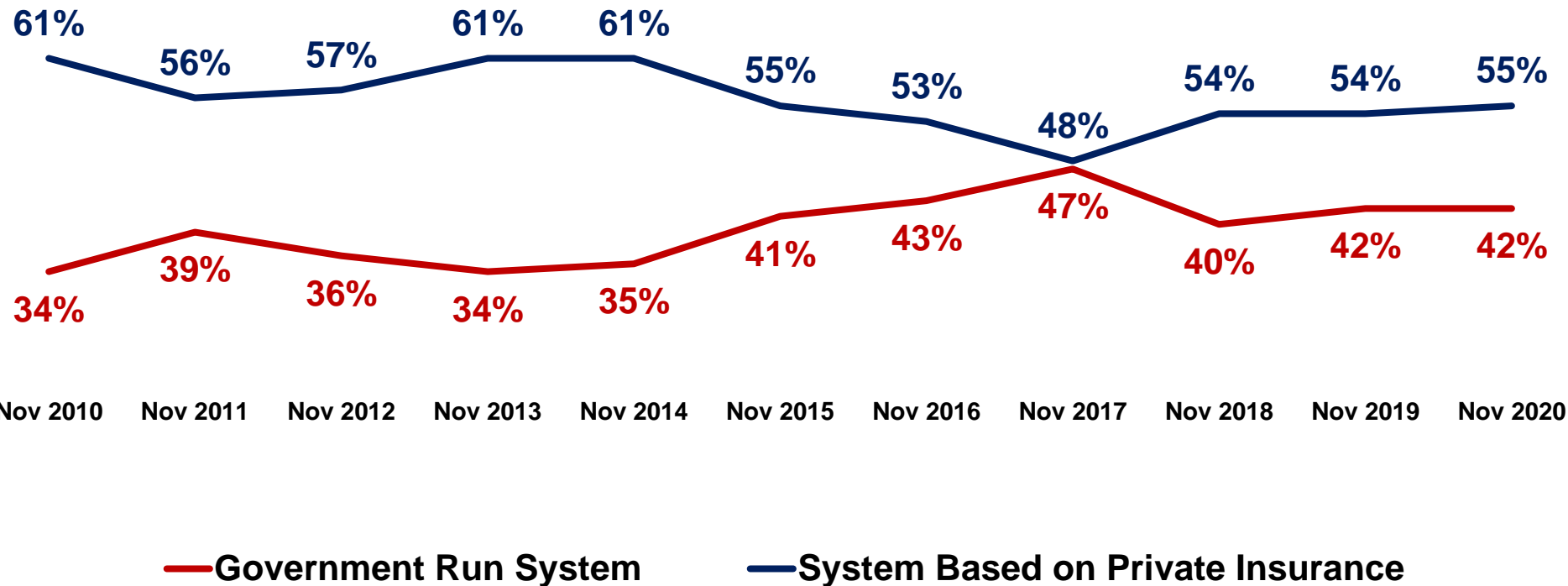
*What would you say is the most urgent health problem facing this country at the present time?*

|                 | Flu/<br>Viruses | Cost       | Access     | Cancer     | Obesity    | Mental<br>Illness | Government<br>Interference | Drug/<br>Alcohol<br>Abuse | AIDS       |
|-----------------|-----------------|------------|------------|------------|------------|-------------------|----------------------------|---------------------------|------------|
| <b>Nov 2020</b> | <b>69%</b>      | <b>4%</b>  | <b>4%</b>  | <b>4%</b>  | <b>4%</b>  | <b>1%</b>         | <b>1%</b>                  | <b>1%</b>                 | <b>0%</b>  |
| <b>Nov 2018</b> | <b>0%</b>       | <b>25%</b> | <b>22%</b> | <b>10%</b> | <b>7%</b>  | <b>2%</b>         | <b>1%</b>                  | <b>10%</b>                | <b>1%</b>  |
| <b>Nov 2017</b> | <b>0%</b>       | <b>16%</b> | <b>24%</b> | <b>11%</b> | <b>7%</b>  | <b>3%</b>         | <b>1%</b>                  | <b>14%</b>                | <b>0%</b>  |
| <b>Nov 2016</b> | <b>2%</b>       | <b>27%</b> | <b>20%</b> | <b>12%</b> | <b>8%</b>  | <b>3%</b>         | <b>0%</b>                  | <b>3%</b>                 | <b>0%</b>  |
| <b>Nov 2014</b> | <b>18%</b>      | <b>19%</b> | <b>18%</b> | <b>10%</b> | <b>10%</b> | <b>1%</b>         | <b>2%</b>                  | <b>1%</b>                 | <b>1%</b>  |
| <b>Nov 2010</b> | <b>1%</b>       | <b>20%</b> | <b>24%</b> | <b>12%</b> | <b>14%</b> | <b>0%</b>         | <b>10%</b>                 | <b>1%</b>                 | <b>1%</b>  |
| <b>Nov 2009</b> | <b>16%</b>      | <b>17%</b> | <b>27%</b> | <b>9%</b>  | <b>8%</b>  | <b>0%</b>         | <b>5%</b>                  | <b>0%</b>                 | <b>1%</b>  |
| <b>Nov 2008</b> | <b>0%</b>       | <b>25%</b> | <b>29%</b> | <b>11%</b> | <b>12%</b> | <b>0%</b>         | <b>1%</b>                  | <b>0%</b>                 | <b>2%</b>  |
| <b>Nov 2004</b> | <b>2%</b>       | <b>29%</b> | <b>27%</b> | <b>9%</b>  | <b>7%</b>  | <b>0%</b>         | <b>1%</b>                  | <b>0%</b>                 | <b>5%</b>  |
| <b>Nov 2002</b> | <b>1%</b>       | <b>24%</b> | <b>13%</b> | <b>21%</b> | <b>7%</b>  | <b>1%</b>         | <b>0%</b>                  | <b>0%</b>                 | <b>8%</b>  |
| <b>Oct 1997</b> | <b>0%</b>       | <b>9%</b>  | <b>13%</b> | <b>15%</b> | <b>0%</b>  | <b>0%</b>         | <b>0%</b>                  | <b>6%</b>                 | <b>29%</b> |
| <b>Oct 1987</b> | <b>0%</b>       | <b>1%</b>  | <b>0%</b>  | <b>14%</b> | <b>3%</b>  | <b>0%</b>         | <b>0%</b>                  | <b>4%</b>                 | <b>68%</b> |

# What's The Same?

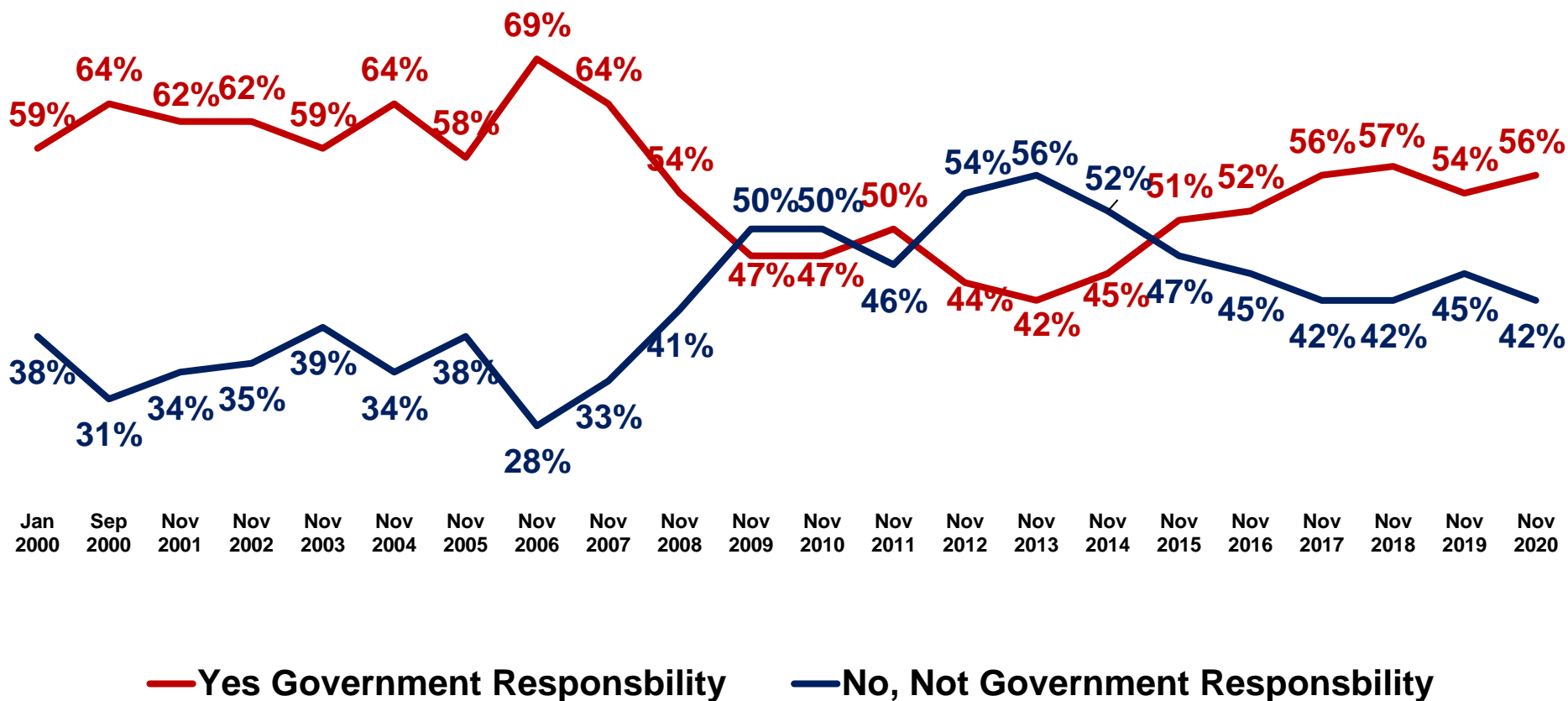
# A majority of Americans continue to prefer a health care system based mostly on private health insurance...

*Which of the following approaches for providing health care in the United States would you prefer -- a government run health care system, (or) a system based mostly on private health insurance?*



...but most Americans continue to believe it is the responsibility of the federal government to make sure all Americans have health care coverage.

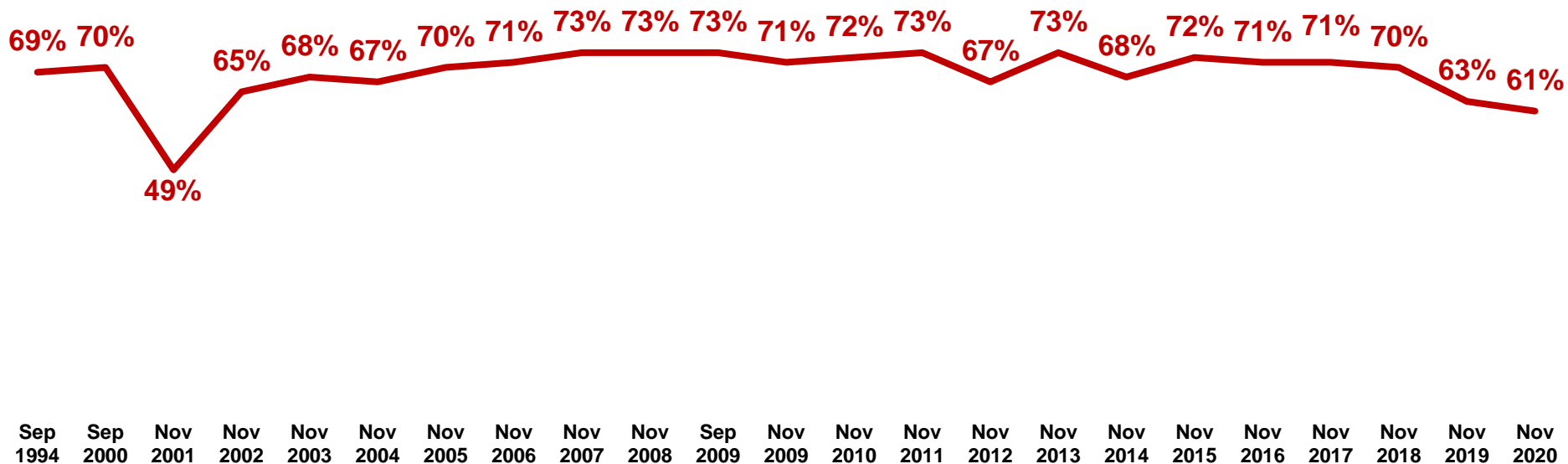
*Do you think it is the responsibility of the federal government to make sure all Americans have health care coverage, or is that not the responsibility of the federal government?*



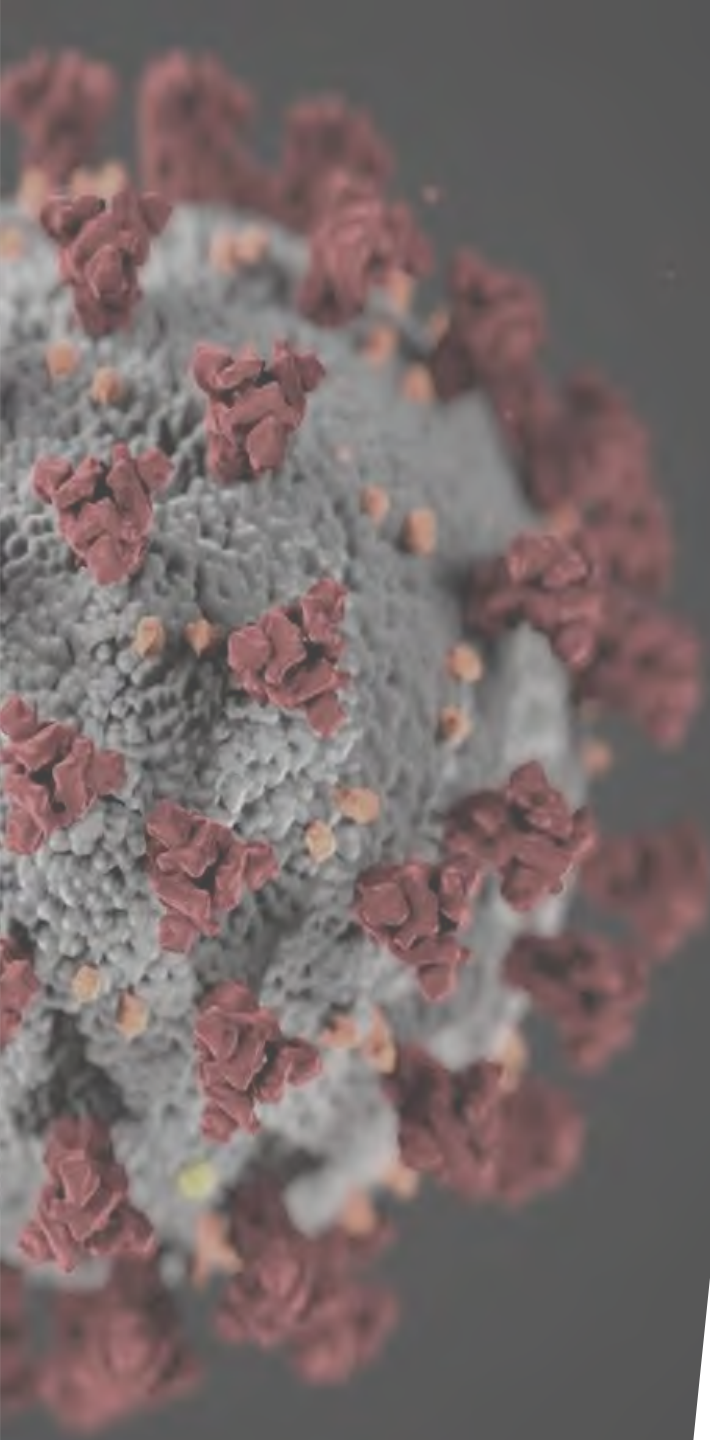
# 6-in-10 Americans believe the U.S. health care system is in a state of crisis or has major problems.

*Which of these statements do you think best describes the U.S. health care system today -- it is in a state of crisis, it has major problems, it has minor problems, (or) it does not have any problems?*

*% State of Crisis/Major Problems*







# PUBLIC OPINION STRATEGIES

turning questions into answers

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