THE CHALLENGING QUEST FOR NORMALCY

Public opinion insights from the July 22, 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

- Visit a retail store: 76%
- Visit a doctor’s office: 66%
- See a movie in a theater: 62%
- Visit a dentist’s office: 50%
- Travel 50+ miles and 1+ nights hotel: 50%
- Attend a live sports event: 47%
- Take a commercial flight: 37%
- Essential services done in home: 31%
- Visit a theme park: 25%
- Non-essential services done in home: 23%
- Attend a conference or convention: 19%
- Take a cruise vacation: 17%
- Attend an open house for a home listed for sale: 15%
- Tour a home listed for sale (outside of an open house): 12%

n=598, Back to Normal Barometer, July 22, 2020
SLIGHT INCREASES IN PAST-MONTH ACTIVITIES

Percent who have participated in this activity in the past month

- Visit a retail store
- Visit a doctor’s office
- Eat at a restaurant
- Essential services done in home
- Non-essential services done in home
- Visit a dentist’s office
- Exercise at a gym
- Tour a home listed for sale (outside of an open house)
- Attend an open house for a home for sale
- Stay at a hotel
- Fly commercially
- See a movie in a theater

Back to Normal Barometer, July 22, 2020
WAVE 8 CONFIDENCE BACK TO EARLY APRIL’S WAVE 1

Confidence Barometer

-2

27%

Current Conditions

-1

22%

Future Expectations

-4

31%

Wave 7: n=598, Back to Normal Barometer – July 8, 2020
Wave 8: n=576, Back to Normal Barometer – July 22, 2020
CONFIDENCE WEAKER IN COVID-HEAVY STATES

“COVID-19 Heavy” states are slightly less confident in the country’s current status and prospects for the future.

Confidence Barometer

COVID-19 Heavy
25%

COVID-19 Light
28%

Current Conditions

COVID-19 Heavy
21%

COVID-19 Light
24%

Future Expectations

COVID-19 Heavy
29%

COVID-19 Light
33%

Wave 7: n=598, Back to Normal Barometer – July 8, 2020
Wave 8: n=576, Back to Normal Barometer – July 22, 2020
MOST CONCERNS EASE SLIGHTLY IN WAVE 8

PERSONAL
- Potential to contract COVID-19: +3
  - Current: 52%

SOCIETAL
- The overall public health crisis: -2
  - Current: 59%

MEDICAL
- Personal Finances: -3
  - Current: 42%

$$$ UNREST
- Impact on leisure activities: -5
  - Current: 39%
- Impact on American society: -2
  - Current: 55%

*Percentage who said they are extremely concerned (top three box).
Wave 7: n=598, Back to Normal Barometer, July 8, 2020
Wave 8: n=576, Back to Normal Barometer – July 22, 2020
COVID-LIGHT STATES ARE MORE CONCERNED

**PERSONAL**

**MEDICAL**
- Potential to contract COVID-19
  - Heavy: 52%
  - Light: 55%

**SOCIETAL**
- The overall public health crisis
  - Heavy: 59%
  - Light: 63%

**UNREST**
- Impact on leisure activities
  - Heavy: 39%
  - Light: 39%

**$$$**
- Personal Finances
  - Heavy: 42%
  - Light: 47%

**Impact on American society**
- Heavy: 55%
  - Light: 57%

*Percentage who said they are extremely concerned (top three box).
Wave 7: n=598, Back to Normal Barometer, July 8, 2020
Wave 8: n=576, Back to Normal Barometer – July 22, 2020
SLIGHT REBOUND IN % WHO WOULD RETURN TOMORROW

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

- Visit a retail store
- Essential services done in home
- Visit a doctor’s office
- Visit a dentist’s office
- Non-essential services done in home
- Attend an open house for a home for sale
- Tour a home listed for sale (outside of an open house)
- Stay at a hotel
- Take a cruise
- Attend a conference or convention
- Attend a live sporting event
- Visit a theme park
- Fly commercially
- See a movie in a theater

n=598, Back to Normal Barometer, July 22, 2020
ECONOMIC RECOVERY HINGES ON CERTAIN SECTORS

For the overall economy to recover, the ________ must also recover.

Percent who strongly agree

- education/public schools: 62%
- retail industry: 57%
- restaurant industry: 57%
- airline industry: 51%
- hotels/resorts industry: 49%
- conventions/conferences industry: 39%
- theme park industry: 34%
- cruise ship industry: 32%

n=598, Back to Normal Barometer, July 22, 2020
Social Unrest & Travel
FEAR OF SOCIAL UNREST UNDERMINING GOP TRAVEL

How concerned are you about the potential for social unrest to affect your resumption of leisure activities?

**REPUBLICANS**
- Very concerned: 46%
- Somewhat concerned: 22%
- Somewhat unconcerned: 18%
- Very unconcerned: 14%

**DEMOCRATS**
- Very concerned: 34%
- Somewhat concerned: 20%
- Somewhat unconcerned: 27%
- Very unconcerned: 19%

**INDEPENDENTS**
- Very concerned: 25%
- Somewhat concerned: 27%
- Somewhat unconcerned: 30%
- Very unconcerned: 18%

n=717, Back to Normal Barometer, July 22, 2020
FEAR OF SOCIAL UNREST UNDERMINING “READY TO GO”

How concerned are you about the potential for social unrest to affect your resumption of leisure activities?

**READY TO GO**
- Very unconcerned: 15%
- Somewhat unconcerned: 17%
- Somewhat concerned: 23%
- Very concerned: 45%

**ASSURANCE SEEKERS**
- Very unconcerned: 25%
- Somewhat unconcerned: 24%
- Somewhat concerned: 23%
- Very concerned: 28%

**NEED-A-MEDICAL-BREAKTHROUGHS**
- Very unconcerned: 21%
- Somewhat unconcerned: 27%
- Somewhat concerned: 22%
- Very concerned: 30%

n=717, Back to Normal Barometer, July 22, 2020
Immunity
NEARLY 1/3 THINK THEY HAVE IMMUNITY FROM COVID-19

Do you believe that you have immunity from COVID-19?

- Yes: 31%
- No: 69%

n=576, Back to Normal Barometer, July 22, 2020
THEY THINK THEY’RE IMMUNE BECAUSE THEY ESCAPED GETTING SICK

Why do you believe that you have immunity from COVID-19?

- I was in high-risk situations and didn't get sick: 41%
- COVID-19 is blown way out of proportion and is not a serious risk: 26%
- I was not tested but got pretty sure it was COVID-19: 23%
- I tested positive for antibodies: 20%
- I had COVID-19: 8%
- Some other reason: 21%

n=179, Back to Normal Barometer, July 22, 2020
Vaccines
7 IN 10 PLAN TO BE VACCINATED

I will definitely get a COVID 19 vaccine when it is available.
IF THEY WANT IT, AND CAN GET IT, THEY’LL GET IT ASAP

Once a vaccine for COVID-19 is available, how soon will you attempt to get one?

- As soon as possible: 64%
- Not immediately, but within the first month or two: 23%
- Within three to six months after it's first availability: 12%
- It won’t be an urgent priority: 1%

n=309, Back to Normal Barometer, July 22, 2020
ONCE VACCINATED, THEIR BAGS ARE PACKED

Wide availability of a COVID 19 vaccine by the end of 2020 would make me much more likely to travel for pleasure in the first half of 2021.
ONE IN FOUR WOULD GET INOCULATED BY AIRLINE/HOTEL

Once a COVID 19 vaccine were available, I would be interested in getting one through a hotel or airline provider.
IN THE MEANIME: SHUT DOWN COVID-HEAVY AREAS

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

COVID-Heavy States

- Strongly disagree: 10%
- Somewhat disagree: 16%
- Somewhat agree: 12%
- Strongly agree: 62%

COVID-Light States

- Strongly disagree: 10%
- Somewhat disagree: 12%
- Somewhat agree: 16%
- Strongly agree: 62%
VACCINATION IS NOT A SLAM-DUNK

Sure, just like I get a flu shot every year

I could save a life by getting vaccinated

I’m not going to be the first

Need more information
What are the side effects?
How effective is it?

Only the healthcare workers really need it

Early Adopters

Wait a bit, or pass
Schools
WHAT’S THE PLAN FOR SCHOOLS?

• Frustration that plans are being communicated with short notice
  ▪ “Schools are disorganized”
• Should be dictated by CDC (science) – NOT politicians
WIDE VARIETY OF APPROACHES

- Delayed start
- Choice of in-person or virtual
- 100% virtual
- Split schedules
- Teachers in school while students virtual

- Virtual school is not as effective as face-to-face, especially for a few key stages
  - Early primary years – social and emotional growth, phonics
  - Transition years - new high schoolers
  - Start of a new school year
- Little empathy for teachers – “They should be considered essential [and] need to be in-person to be effective”
- Other concerns – buses, meals, extra-curriculars
DESIRED REASSURANCE MEASURES

- Increased sanitization
- Reduced student movement
- Reduced seating in classrooms and other common areas
- Masks
- Social distancing or barriers between desks
- No busing
- No sharing laptops, books, supplies
- Test teachers regularly
- Contact tracing
ONLINE DIAL TEST:
A SCHOOL SUPERINTENDENT ALERTS PARENTS THAT SCHOOLS WILL RE-OPEN
GETTING MOMENT-TO-MOMENT FEEDBACK

- 55 parents of students in grades K-12 watched a three-minute video embedded in an online survey

- They were told: “You are going to see a video that could be from the superintendent of any school district in America. I’d like you to imagine, for the sake of this exercise, the person in the video is your school district’s superintendent, and she has made this video to send to all parents of school-age children.”
Please do not refresh, resize or move your browser once you start viewing.

Please rate this video for how much you dislike or like what you are hearing at any point during the video. Zero means you strongly dislike what you're hearing and 100 means you strongly like what you're hearing.

Please rate continuously and do NOT wait until the end to provide your feedback.

The slider will be on a scale of 0 - 100, with 0 = Strongly Dislike and 100 = Strongly Like.
WHY DID MOMS PUSH BACK ON MASKS?

“I don't like the thought of the kids having to wear masks and social distance basically all day long.”—Mother 1

“They will force the school kids to wear face masks while they are trying to learn. This is so wrong. Kids do not need this. The face masks will only get more kids sick by wearing them and breathing in bad stuff from their own breath.”

—Mother 2
PARENTS WANT SCHOOLS TO RE-OPEN, AND SAFETY IS KEY

I want schools to reopen as soon as that can be done safely.
CIVIC OBLIGATION ARGUMENT IS ONLY SOMEWHAT COMPELLING

It's our civic obligation to re-open schools this Fall.

- Strongly agree: 32%
- Somewhat agree: 19%
- Strongly disagree: 29%
- Somewhat disagree: 20%
THERE’S ONLY MODEST CONFIDENCE IN VIRTUAL EDUCATION

Virtual education is an acceptable substitution for in-person classes.

- Strongly agree: 39%
- Somewhat agree: 23%
- Somewhat disagree: 18%
- Strongly disagree: 20%

n=576, Back to Normal Barometer, July 22, 2020
Schools shut down mid-semester in March. If health-related conditions allow, they should be able to re-open mid-semester in October and not have to be online for the rest of 2020.
MORE SAY STUDENTS ARE AT MORE RISK THAN TEACHERS

Who is more at risk if schools were to re-open?

Teachers 46%  Students 54%
US Travel
READY OR NOT: STAY AT A HOTEL OR RESORT

Which of the following conditions is closest to your current point of view... Stay at a hotel or resort

- Recently Active
- Ready to go
- Assurance Seekers
  - 19%
- Need a medical breakthrough
  - 30%
- Ready to go
  - 40%

- 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.

n=286, Back to Normal Barometer, July 22, 2020
READY OR NOT: VISIT A THEME PARK

Which of the following conditions is closest to your current point of view... Visit a theme park

- **Ready to go**: 45%
- **Need a medical breakthrough**: 41%
- **Assurance Seekers**: 14%
- **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.**

n=145, Back to Normal Barometer, July 22, 2020
READY OR NOT: TAKE A CRUISE VACATION

Which of the following conditions is closest to your current point of view... Take a cruise vacation

- **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.

- **Assurance Seekers** 12%
- **Need a medical breakthrough** 38%
- **Ready to go** 50%
READY OR NOT: VISIT A RETAIL STORE

Which of the following conditions is closest to your current point of view... Visit a retail store

- Recently Active: 59%
- Ready to go: 27%
- Need a medical breakthrough: 9%
- Assurance Seekers: 5%

- 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, 60% RETURN IN 3 MONTHS

Assuming you had the necessary assurances that it was safe to resume normal activities, how quickly would you next..... Take a trip that included travel of 50 miles or more and 1+ nights in a hotel or other paid lodging?

- Immediately: 17%
- Within one month: 15%
- Within two months: 15%
- Within three months: 13%
- Within six months to a year: 15%
- More than a year out: 9%
- Within 3-6 months: 16%

Equal to Wave 1, 60%

n=286, Back to Normal Barometer, July 22, 2020
WITH ASSURANCES, 53% RETURN IN 3 MONTHS

Assuming you had the necessary assurances that it was safe to resume normal activities, how quickly would you next..... Visit a theme park?

- Immediately: 13%
- Within one month: 13%
- Within two months: 14%
- Within three months: 13%
- Within six months to a year: 15%
- More than a year out: 16%
- Within 3-6 months: 16%

n=145, Back to Normal Barometer, July 22, 2020

Up from 52% in Wave 1
WITH ASSURANCES, 52% RETURN IN 3 MONTHS

Assuming you had the necessary assurances that it was safe to resume normal activities, how quickly would you next..... Take a cruise vacation?

- Immediately: 16%
- Within one month: 12%
- Within two months: 7%
- Within three months: 17%
- Within six months to a year: 13%
- More than a year out: 18%

n=98 Back to Normal Barometer, July 22, 2020

Up from 50% in Wave 1
WITH ASSURANCES, 85% RETURN IN 3 MONTHS

Assuming you had the necessary assurances that it was safe to resume normal activities, how quickly would you next..... Visit a retail store?

- Immediately: 46%
- Within one month: 24%
- Within two months: 9%
- Within three months: 6%
- Within 3-6 months: 5%
- Within six months to a year: 7%
- More than a year out: 3%

n=437, Back to Normal Barometer, July 22, 2020
MEN MORE LIKELY TO TAKE BUSINESS TRIPS IF SCHOOLS OPEN

If schools re-open this autumn, I am more likely to take a business trip during autumn.
MEN MORE LIKELY TO TAKE PLEASURE TRIPS IF SCHOOLS OPEN

If schools re-open this autumn, I am more likely to take a pleasure trip during autumn.

Male Business Travelers

- Strongly disagree: 23%
- Somewhat disagree: 23%
- Somewhat agree: 17%
- Strongly agree: 37%

Female Business Travelers

- Strongly agree: 20%
- Somewhat agree: 14%
- Somewhat disagree: 22%
- Strongly disagree: 44%

n=576, Back to Normal Barometer, July 22, 2020
1/4 LIKELY TO TAKE A WEEK-LONG PERSONAL TRIP IN SEPT.

How likely are you to take a week-long family or personal vacation in the month of September?

- Very likely: 25%
- Somewhat likely: 13%
- Somewhat unlikely: 19%
- Very unlikely: 43%
IN GENERAL, REMOTE LEARNING DOESN’T MAKE SEPT. TRAVEL LIKELIER...

Recognizing that it's likely students will attend classes remotely this autumn, how likely would you be to take a week-long family or personal vacation during the month of September this year?
Recognizing that it's likely students will attend classes remotely this autumn, how likely would you be to take a week-long family or personal vacation during the month of September, this year?

- Total: 20%
- Male: 26%
- 25 - 34: 25%
- 35 - 44: 29%
- West: 24%
- Very Liberal: 30%
- Very Conservative: 31%
- $95K+: 35%
- Graduate degree: 24%
- College Graduate: 28%
- People with children: 25%
- Primary School: 25%
- High School: 26%

n=117, Back to Normal Barometer, July 22, 2020
IN GENERAL, FREE NIGHTS DON’T MAKE SEPT. TRAVEL LIKELIER...

If you were presented with an offer to stay for eight nights but pay for just six, how likely would you be to take a week-long family or personal vacation during the month of September this year?

- Very unlikely: 39%
- Somewhat unlikely: 19%
- Somewhat likely: 19%
- Very likely: 23%
BUT... WELL-EDUCATED WOULD TRAVEL IN SEPT. IF OFFERED FREE NIGHTS

If you were presented with an offer to stay for eight nights but pay for just six, how likely would you be to take a week-long family or personal vacation during the month of September, this year?

<table>
<thead>
<tr>
<th>Group</th>
<th>Likelihood (%)</th>
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<tbody>
<tr>
<td>Total</td>
<td>23%</td>
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<td>People with children</td>
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<tr>
<td>High School</td>
<td>27%</td>
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QUESTIONS

• What questions do you have about these findings?

• What do you want to ask in Wave 9?
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