WAVE 13: Anxiously awaiting the election

Public opinion insights from the October 7, 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

Percentages in white represent those in the entire sample (n=510) who have completed an activity in the past month.

Visit a retail store: 64%
Visit a doctor's office: 61%
Travel 50+ miles and 1+ nights hotel: 55%
Visit a dentist's office: 46%
Take a commercial flight: 42%
Attend a live sports event: 41%
Visit a theme park: 30%
Attend a conference or convention: 21%
Take a cruise vacation: 20%
Attend an open house for a home listed for sale: 14%
Tour a home listed for sale (outside of an open house): 12%

n=510, Back to Normal Barometer, Oct. 7, 2020
CONFIDENCE BAROMETER SHOWS MINOR UPTICK

Back to Normal Barometer, Oct. 7, 2020
FOUR CONCERNS VIE FOR MOST WORRYING

% who are very concerned about each item; Back to Normal Barometer, Oct. 7, 2020
“RECENTLY ACTIVE” + “READY TO GO” CLIMB IN MANY SECTORS

[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

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

Back to Normal Barometer, Oct. 7, 2020
But then there’s the election…
VIEWS COMPETE OVER WHEN WE’LL KNOW WHO WON

Americans will know who won the Presidential election within 24 hours of Election Day

We will not know the final results of the Presidential election until several weeks after Election Day

Percent who say very likely

<table>
<thead>
<tr>
<th>Region</th>
<th>Total</th>
<th>Male</th>
<th>35-64</th>
<th>Liberal</th>
<th>Northeast</th>
<th>South</th>
<th>College Grad+</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total</td>
<td>36%</td>
<td>45%</td>
<td>45%</td>
<td>42%</td>
<td>41%</td>
<td>39%</td>
<td>40%</td>
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<tr>
<td>Male</td>
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<td></td>
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<td>35-64</td>
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<td>Liberal</td>
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<td>Northeast</td>
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<td>South</td>
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<td>College Grad+</td>
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MAJORITY OF MEN THINK THERE WILL BE ELECTION LAWSUITS

In your opinion, please indicate the likelihood of the following to happen: There will be widespread litigation by one or both Presidential candidates to contest the election results.

- Total: 46%
- Male: 53%
- 35-64: 56%
- Liberal: 51%
- Conservative: 48%
- Northeast: 50%
- West: 50%

n=491, Back to Normal Barometer, Oct. 7, 2020
MORE THAN 1/3 EXPECT ELECTION ANARCHY AND CHAOS

In your opinion, please indicate the likelihood of the following to happen: The results of this election will plunge our country into violent anarchy and chaos.

n=491, Back to Normal Barometer, Oct. 7, 2020
SO, YES, THE STRESS REMAINS

• 65% are more stressed than a month ago

• 61% expect to be more stressed a month from now

• 58% are stockpiling/plan to stockpile food and other essentials

• 61% agree they’re concerned about a second civil war
IN-DEPTH INTERVIEWS – GOT STRESS?
THIS IS WHAT A DIVIDED COUNTRY SOUNDS LIKE

• The pandemic, election, and social unrest created a remarkable divide
  ▪ “I feel like it’s neighbor against neighbor.”
  ▪ “There is literally somebody, something out there trying to divide everybody, and they're doing a good job at it.”
  ▪ “In the Pledge of Allegiance, it’s ‘One country under God, indivisible’... And right now it’s not like we're indivisible - we're very divided.”
  ▪ “The whole atmosphere is kind of fighting right now. It's like everyone's mad at each other... And you're afraid to talk about it with people because of the aggressiveness.”
  ▪ “We've all had to get rid of friends recently because we just don't agree on everything. I've blocked phone numbers. My social media is deactivated because I just couldn't handle the amount of negativity on there.”

• Even families are divided
  ▪ Police officer’s daughter saying things that go against her roots
  ▪ Brother and sister stopped talking – wedge over politics
US Travel
MORE THAN HALF WOULD STAY AT A HOTEL, OR HAVE ALREADY

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

- Recently Active
- Ready to go

- 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.

- 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.

Back to Normal Barometer, Oct. 7, 2020
2/3 WILLING TO VISIT A THEME PARK

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

- Ready to go
- 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.
- 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.

Percent who fit this category

Jul. 8  Jul. 22  Aug. 5  Aug. 19  Sept. 9  Sept. 23  Oct. 7

Back to Normal Barometer, Oct. 7, 2020
NEARLY 3 OUT OF 4 WILLING TO TAKE A CRUISE

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

Percent who fit this category

- 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.

- 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.

Back to Normal Barometer, Oct. 7, 2020
60% WOULD ATTEND A CONFERENCE OR CONVENTION

Which of the following conditions is closest to your current point of view... Attend a conference or convention

- **Ready to go**
- 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.
- 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.

Back to Normal Barometer, Oct. 7, 2020
US TRAVEL: 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...

- Attend a conference or convention
- Take a cruise vacation
- Visit a theme park
- Travel 50+ miles and 1+ nights hotel

Percent of hesitant respondents who would return within 3 months

Back to Normal Barometer, Oct. 7, 2020
HOTELS: MOST ASSURANCE COMES FROM A CURE OR VACCINE

Which of these singular occurrences (alone or in conjunction with something else) would make you comfortable to stay in a hotel or resort, without reservation?

- Approval of a COVID-19 vaccine: 50% would need this occurrence, 32% would need this occurrence alone, 18% would need this occurrence plus at least one other item.
- Approval of a pharmaceutical protocol to mitigate the effects of COVID-19: 55% would need this occurrence, 20% would need this occurrence alone, 25% would need this occurrence plus at least one other item.
- Assurance from a reputed national medical authority that it is safe to do so: 50% would need this occurrence, 25% would need this occurrence alone, 25% would need this occurrence plus at least one other item.
- Assurance from the property that it is safe to do so: 45% would need this occurrence, 18% would need this occurrence alone, 37% would need this occurrence plus at least one other item.
- Assurance from the U.S. Government that it is safe to do so: 39% would need this occurrence, 19% would need this occurrence alone, 42% would need this occurrence plus at least one other item.
- Assurance from multiple media outlets that it is safe to do so: 38% would need this occurrence, 16% would need this occurrence alone, 46% would need this occurrence plus at least one other item.

n=205, Back to Normal Barometer, Oct. 7, 2020
FLYING: MOST ASSURANCE COMES FROM A CURE OR VACCINE

Which of these singular occurrences (alone or in conjunction with something else) would make you comfortable to fly commercially, without reservation?

- This ALONE would be sufficient assurance for me
- I would need this occurrence/condition PLUS at least one other item on this list
- This would NOT EVEN PARTIALLY impact my decision one way or another

Percent who feel this way

<table>
<thead>
<tr>
<th>Event</th>
<th>0%</th>
<th>10%</th>
<th>20%</th>
<th>30%</th>
<th>40%</th>
<th>50%</th>
<th>60%</th>
<th>70%</th>
<th>80%</th>
<th>90%</th>
<th>100%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Approval of a COVID-19 vaccine</td>
<td>31%</td>
<td>19%</td>
<td>17%</td>
<td>19%</td>
<td>24%</td>
<td>52%</td>
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<tr>
<td>Approval of a pharmaceutical protocol to mitigate the effects of COVID-19</td>
<td>19%</td>
<td>24%</td>
<td>57%</td>
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<tr>
<td>Assurance from a reputed national medical authority that it is safe to do so</td>
<td>19%</td>
<td>25%</td>
<td>43%</td>
<td>43%</td>
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</tr>
<tr>
<td>Assurance from the U.S. Government that it is safe to do so</td>
<td>17%</td>
<td>40%</td>
<td>43%</td>
<td>43%</td>
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<tr>
<td>Assurance from the airline that it is safe to do so</td>
<td>16%</td>
<td>44%</td>
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</tr>
<tr>
<td>Assurance from multiple media outlets that it is safe to do so</td>
<td>16%</td>
<td>50%</td>
<td>57%</td>
<td>57%</td>
<td>57%</td>
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</tbody>
</table>

n=88, Back to Normal Barometer, Oct. 7, 2020
NEGATIVE TESTS MAKE ONLY A PORTION MORE LIKELY TO FLY

What would be the impact, if any, of knowing that all guests and staff had tested negative for COVID-19 immediately before engaging in each of the following?

Taking a domestic commercial flight

- Much more likely: 34%
- Somewhat more likely: 17%
- Somewhat less likely: 18%
- Much less likely: 31%

Taking an international commercial flight

- Much more likely: 27%
- Somewhat more likely: 18%
- Somewhat less likely: 17%
- Much less likely: 38%

n=510, Back to Normal Barometer, Oct. 7, 2020
NEGATIVE TESTS MAKE 41% MORE LIKELY TO ATTEND CONVENTION

What would be the impact, if any, of knowing that all guests and staff had tested negative for COVID-19 immediately before engaging in the following? Attending a large trade show or convention
PLURALITY NOT GOING FAR FOR THE HOLIDAYS

Which of the following best describes your plans for the upcoming holidays - Thanksgiving?

- I am undecided at this point: 15%
- I am not likely to travel 50+ miles from home: 41%
- I am likely to travel 50+ miles from home and stay with friends or family: 28%
- I am likely to travel 50+ miles from home and stay in paid lodging: 16%

Which of the following best describes your plans for the upcoming holidays – The December Holidays?

- I am undecided at this point: 15%
- I am not likely to travel 50+ miles from home: 41%
- I am likely to travel 50+ miles from home and stay with friends or family: 24%
- I am likely to travel 50+ miles from home and stay in paid lodging: 20%

n=510, Back to Normal Barometer, Oct. 7, 2020
Which of the following describes your current plans, if any, for booking Thanksgiving air travel?

- I typically do not fly at Thanksgiving, and this year is no exception 43%
- I plan to book in October 14%
- I plan to book in November 23%
- I do not plan to travel by air this Thanksgiving, while most Thanksgivings I do fly 20%

Which of the following best describes your current plans, if any, for booking air travel for the December holidays?

- I typically do not fly for the December holidays, and this year is no exception 37%
- I plan to book in October 12%
- I plan to book in November 17%
- I plan to book in December 17%
- I do not plan to travel by air this December, while most years, I do fly for the holidays 17%
HERE’S WHERE THEY PLAN TO VISIT

Which, if any, of the following destinations would you consider visiting for vacation over the next six months?

<table>
<thead>
<tr>
<th>Destination</th>
<th>Percentage</th>
<th>Destination</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Las Vegas</td>
<td>25%</td>
<td>Nashville</td>
<td>9%</td>
</tr>
<tr>
<td>Los Angeles</td>
<td>17%</td>
<td>Boston</td>
<td>9%</td>
</tr>
<tr>
<td>New York</td>
<td>17%</td>
<td>Seattle</td>
<td>9%</td>
</tr>
<tr>
<td>Washington, DC</td>
<td>16%</td>
<td>Denver</td>
<td>8%</td>
</tr>
<tr>
<td>Orlando, FL</td>
<td>15%</td>
<td>Memphis</td>
<td>7%</td>
</tr>
<tr>
<td>San Francisco</td>
<td>14%</td>
<td>Oklahoma City</td>
<td>7%</td>
</tr>
<tr>
<td>Dallas</td>
<td>13%</td>
<td>Phoenix</td>
<td>7%</td>
</tr>
<tr>
<td>Chicago</td>
<td>13%</td>
<td>Portland, OR</td>
<td>5%</td>
</tr>
<tr>
<td>San Diego</td>
<td>12%</td>
<td>None</td>
<td>31%</td>
</tr>
</tbody>
</table>
**HERE’S WHERE THEY WOULD GO OVERSEAS**

Assuming that international travel restrictions and all required quarantines were lifted, which of the following regions of the world would you be most likely to travel to first?

<table>
<thead>
<tr>
<th>Region</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Western Europe</td>
<td>23%</td>
</tr>
<tr>
<td>Caribbean</td>
<td>13%</td>
</tr>
<tr>
<td>Asia</td>
<td>7%</td>
</tr>
<tr>
<td>Australia</td>
<td>6%</td>
</tr>
<tr>
<td>Central America</td>
<td>5%</td>
</tr>
<tr>
<td>Africa</td>
<td>5%</td>
</tr>
<tr>
<td>Mexico</td>
<td>4%</td>
</tr>
<tr>
<td>Middle East</td>
<td>3%</td>
</tr>
<tr>
<td>Eastern Europe</td>
<td>3%</td>
</tr>
<tr>
<td>South America</td>
<td>3%</td>
</tr>
<tr>
<td>None of the Above</td>
<td>29%</td>
</tr>
<tr>
<td>Africa</td>
<td>5%</td>
</tr>
</tbody>
</table>

n=279, Back to Normal Barometer, Aug. 19, 2020
MAJOR OPTIMISM CONVEYED BY CRUISERS

[Among those who have taken a cruise in the past year:] Please indicate how much you agree or disagree with each of the following statements.

<table>
<thead>
<tr>
<th>Statement</th>
<th>Percent who agree</th>
</tr>
</thead>
<tbody>
<tr>
<td>I feel that I can responsibly keep myself safer on a cruise ship than at a hotel or resort</td>
<td>62%</td>
</tr>
<tr>
<td>Cruising is one of my favorite leisure activities</td>
<td>60%</td>
</tr>
<tr>
<td>Cruise lines are very experienced and adept at preventing viral outbreaks on board and will be ready to protect my safety once they resume sailing</td>
<td>58%</td>
</tr>
<tr>
<td>The cruise lines are meticulous in providing a safe and comfortable environment</td>
<td>55%</td>
</tr>
<tr>
<td>I just can’t wait to take another cruise vacation</td>
<td>53%</td>
</tr>
</tbody>
</table>
Vaccines
EMPLOYERS SHOULD MAKE GETTING VACCINES EASIER

My employer should make it easy for employees to get a flu shot this autumn

- Strongly agree: 64%
- Somewhat agree: 15%
- Somewhat disagree: 14%
- Strongly disagree: 7%

Once a COVID-19 vaccine becomes widely available, my employer should make it easy for employees to get it

- Strongly agree: 60%
- Somewhat agree: 18%
- Somewhat disagree: 14%
- Strongly disagree: 8%
VACCINATION INTENT FALLS TO A LOW POINT

• 58% are strongly concerned that there will be a second wave of COVID-19 outbreak, requiring event cancellations and lockdowns this year

• Only 29% strongly agree that the COVID-19 pandemic is less of a threat to Americans than it was this summer

• More than half of the country is still very concerned about the potential for themselves or a loved one to contract COVID-19

...Yet a Barometer low 49% now strongly agree that they will definitely get a COVID-19 vaccine when it becomes available
KEY GROUPS LAG IN WILLINGNESS TO GET COVID VACCINE

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

- Total: 49%
- Female: 41%
- Under 35: 46%
- Moderate: 36%
- Midwest: 37%
- Black: 31%
- Hispanic: 36%
- Asian: 30%
- Some College: 39%
QUESTIONS?

• What questions do you have about the findings?

• What should we ask in wave 14?
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