

# American Resolve

Getting on with Life: What's Next





## COVID19 Survey Methodology

The Harris Poll is committed to providing the latest in public opinion polling on the Coronavirus outbreak as a free service to public health officials, media, policymakers, the business community, and the American public. We are in the field conducting bi-tri-weekly overnight polling among a nationally representative sample of U.S. adults on a range of different topics as this crisis continues to unfold. [All data is published free on our website.](#)

This survey (Wave 8) was conducted online within the U.S. by The Harris Poll from April 18-20 among a nationally representative sample of 2,029 U.S. adults.

Additionally, we conducted a proprietary overnight poll on April 22<sup>nd</sup> amongst a nationally representative sample of 405 adults who travel for leisure (3+ flights per year for leisure) and 125 business travelers (5+ flights per year for business).

This online survey is not based on a probability sample and therefore no estimate of theoretical sampling error can be calculated. Results are weighted for age within gender, race/ethnicity, household income, and education where necessary to align them with their actual proportions in the population.

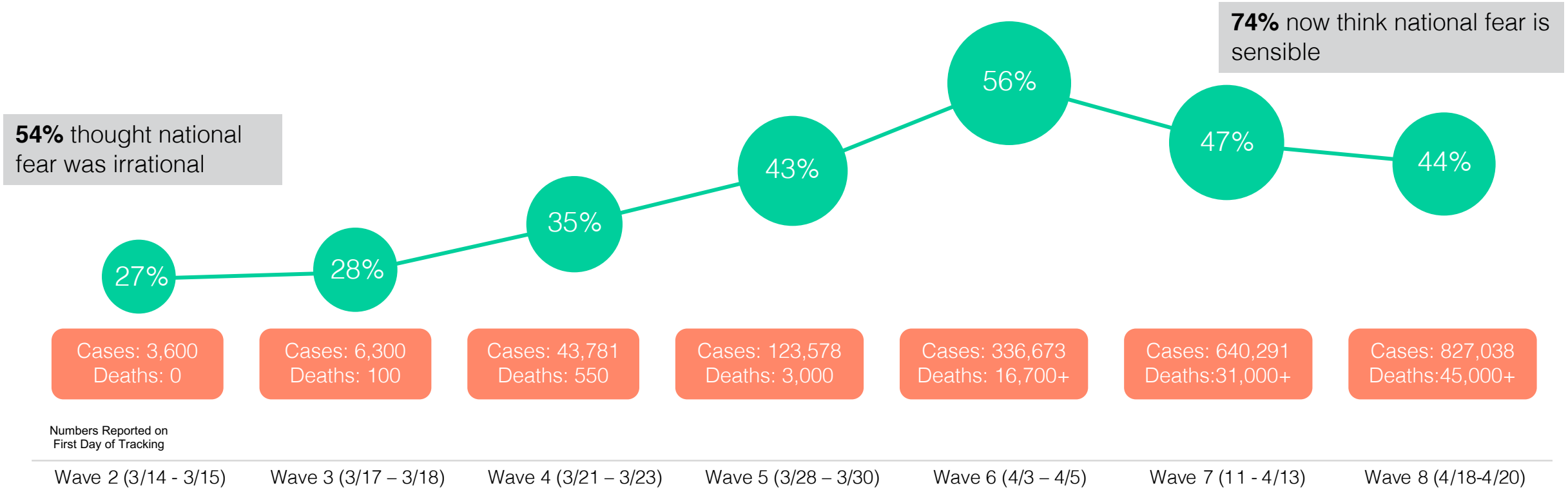


# American Society: Fear, Finances and the Future



# The American Fear Curve Has Started to Recede Even As Cases/Deaths Grow

Which of the following is true for you?  
 “I fear I could die as a result of contracting coronavirus”



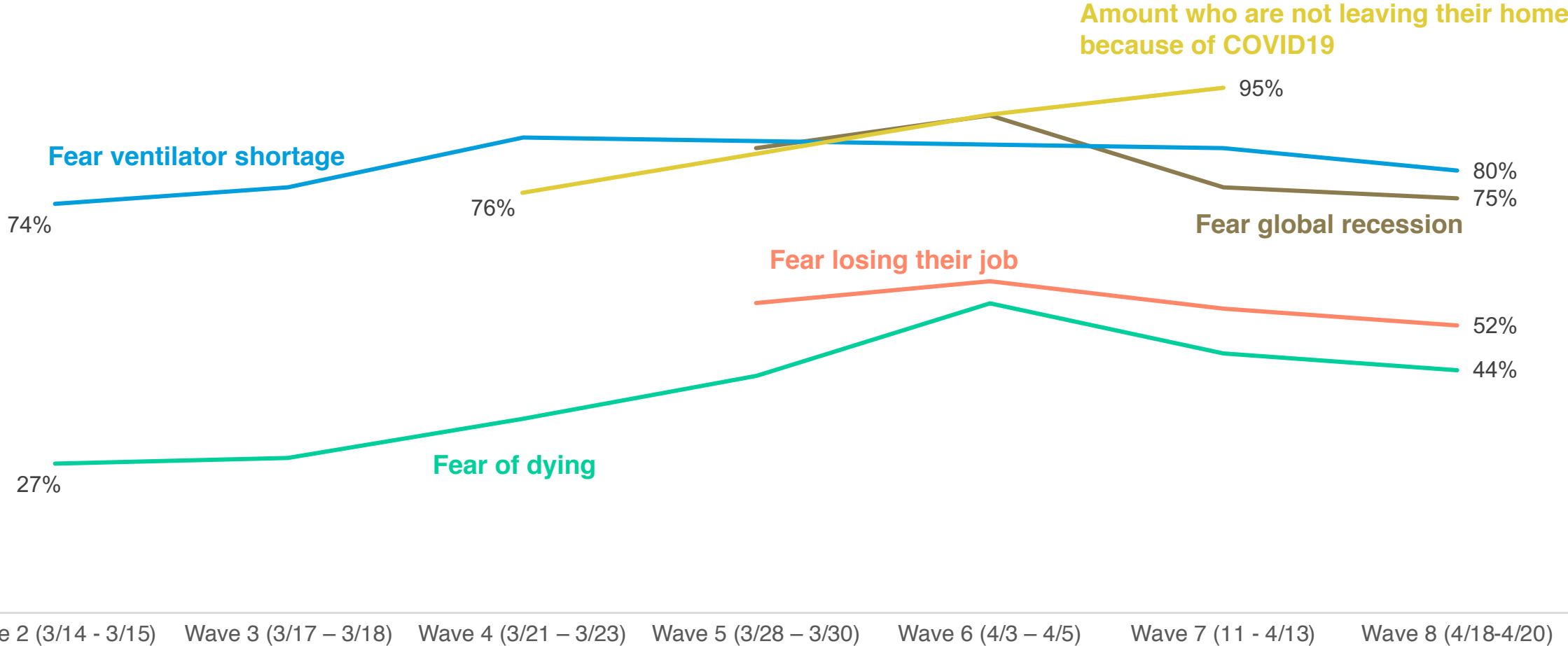
Numbers Reported on First Day of Tracking

Source: Harris Poll COVID19 Tracker Wave 2-8  
 BASE: GENERAL PUBLIC W2 (2050); W3 (2019); W4 (2023) W5 (2016); W6 (1993); W7 (2013); W8 (2029)  
 Q18 Which of the following is true for you? I fear I could die as a result of contracting coronavirus/ I do not fear that I could die as a result of contracting coronavirus  
 Harris Insights & Analytics LLC, A Stagwell Company © 2020



# Fear Comes in Waves: First Health. Then Jobs. And Now, Leaving the House

### Trended Fear Curves During COVID19

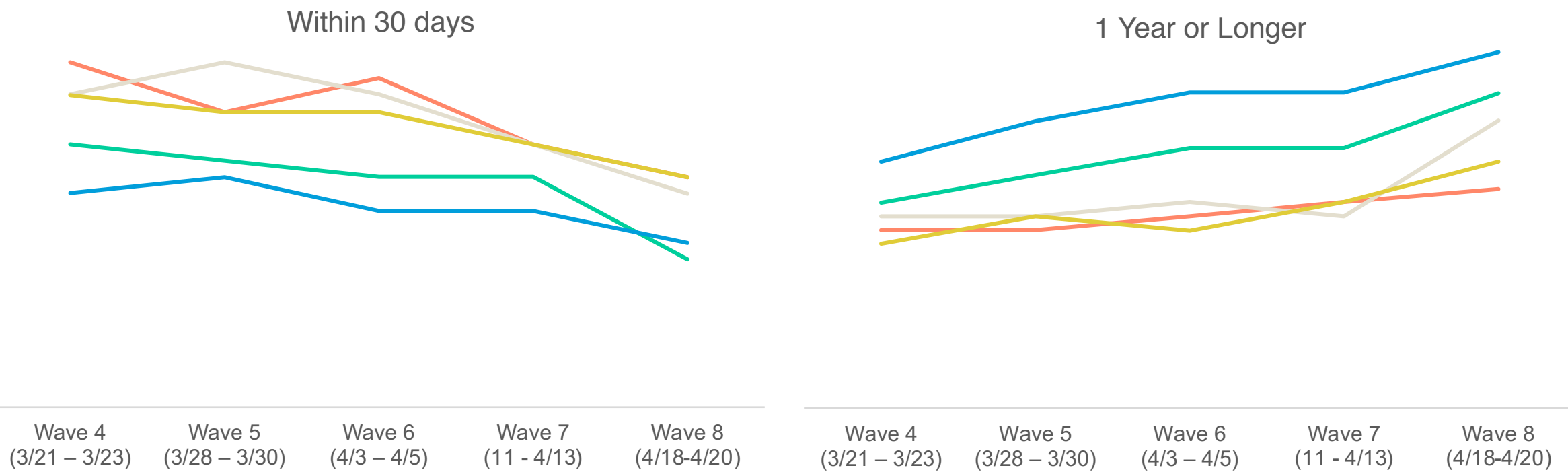




# New Wave of Fear on Normalcy: Americans Are More Cautious To Return To Public Activity

Once the government provides information that the spread of the virus is flattening how long will it take you to do each of the following?

■ Go to a sporting event 
 ■ Go to the movies 
 ■ Take Public Transit 
 ■ Visit a Casino 
 ■ Host large gathering

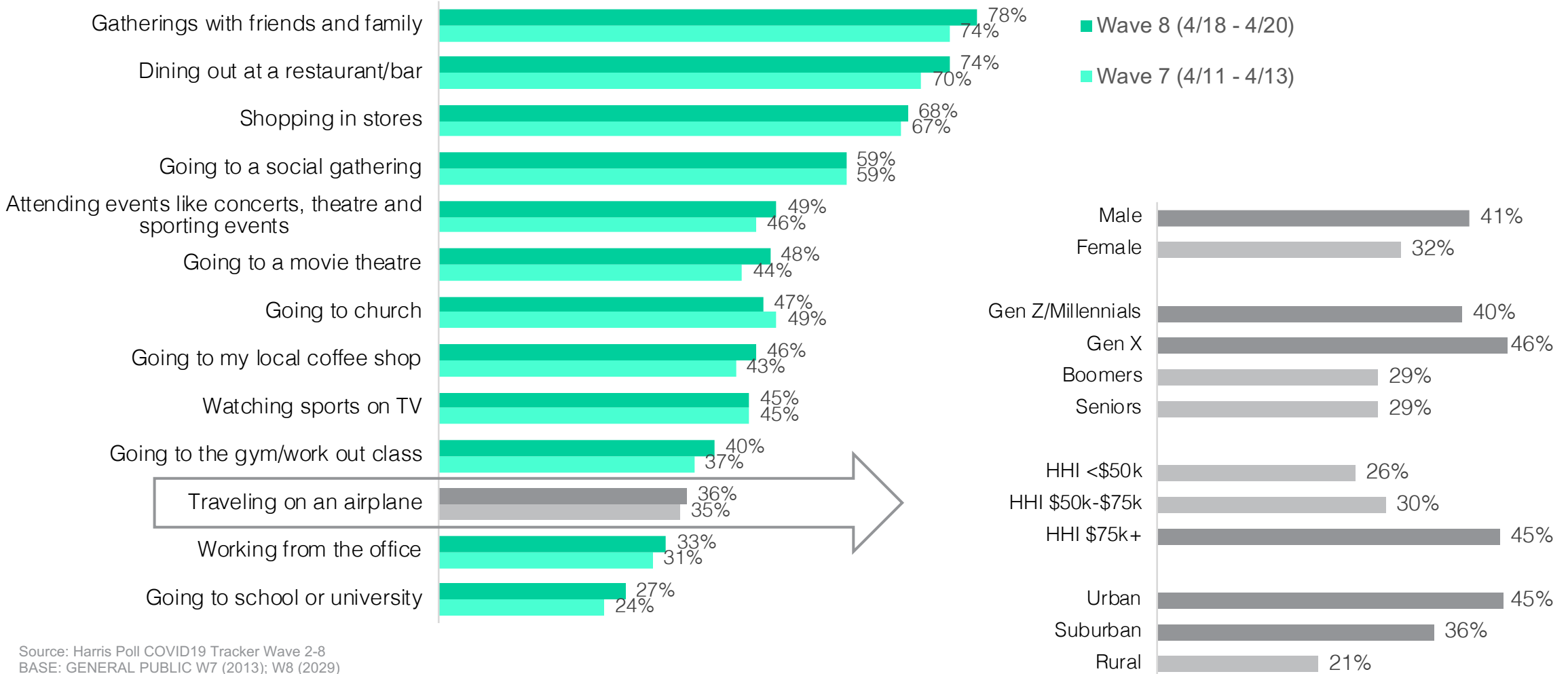


BASE: GENERAL PUBLIC & APPLICABLE RESPONSE W8 (VARIES)  
 Q33B Once the government provides information that the spread of the virus is flattening how long will it take you to do each of the following?  
 Harris Insights & Analytics LLC, A Stagwell Company © 2020



# Americans Miss Their Social Life; Especially Dining Out, Shopping, and Even Flying on Airplane

How much would you say you miss each of the following during this time of virus-related shutdowns?  
% A lot/Somewhat



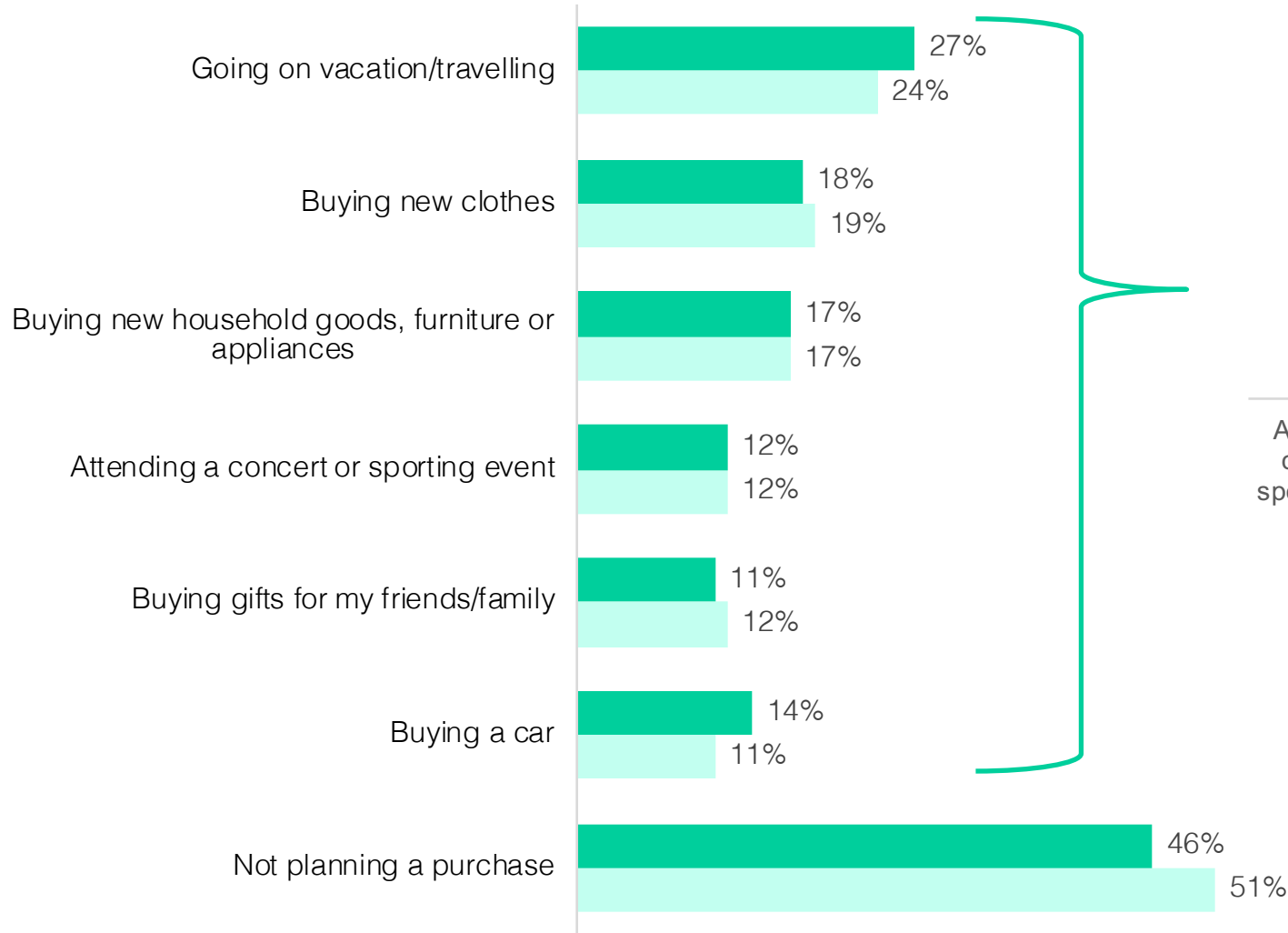
Source: Harris Poll COVID19 Tracker Wave 2-8  
 BASE: GENERAL PUBLIC W7 (2013); W8 (2020)  
 FR05 How much would you say you miss each of the following during this time of virus-related shutdowns?  
 Harris Insights & Analytics LLC, A Stagwell Company © 2020



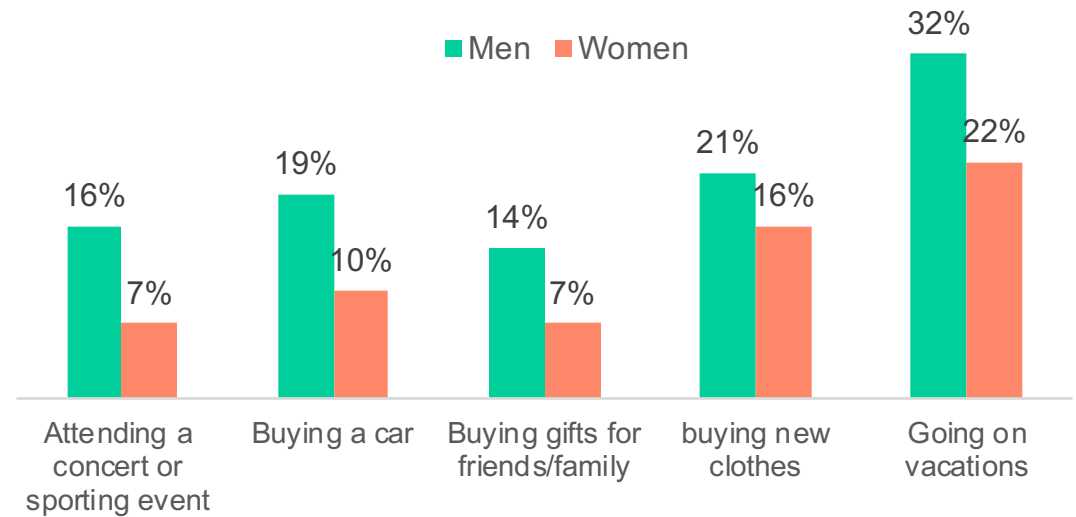


# Creating a Noticeable Pent-up Demand for Travel and Shopping ('Revenge Spending')

Major Purchases Planned Once Things Return To Normal



Men are more likely than women to plan on:



NANCY ARMOUR

**Opinion: There will come a time when sports will be ready to return. Will we be?**

Nancy Armour USA TODAY

■ Wave 8 (4/18 – 4/20)

■ Wave 5 (3/28 – 3/30)

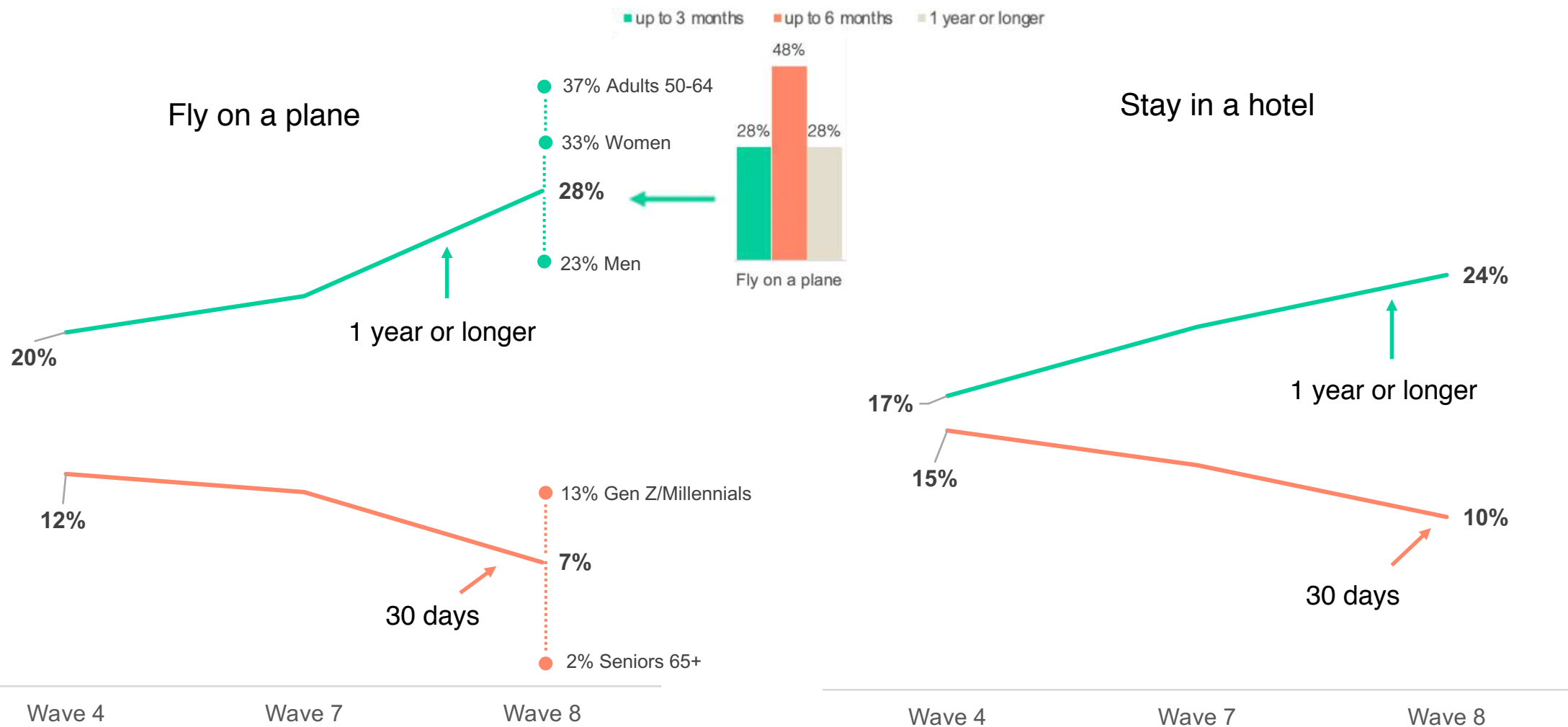
BASE: GENERAL PUBLIC W5 (2016); W6 (1993); W8 (2029)  
 REV01 Are you planning any major purchases once things return to normal and businesses re-open? Please select all that apply.





# Especially Travel: Consumers See Self-Imposed Longer Time Limits Until They Fly Or Stay In A Hotel

Once the government provides information that the spread of the virus is flattening how long will it take you to do each of the following?

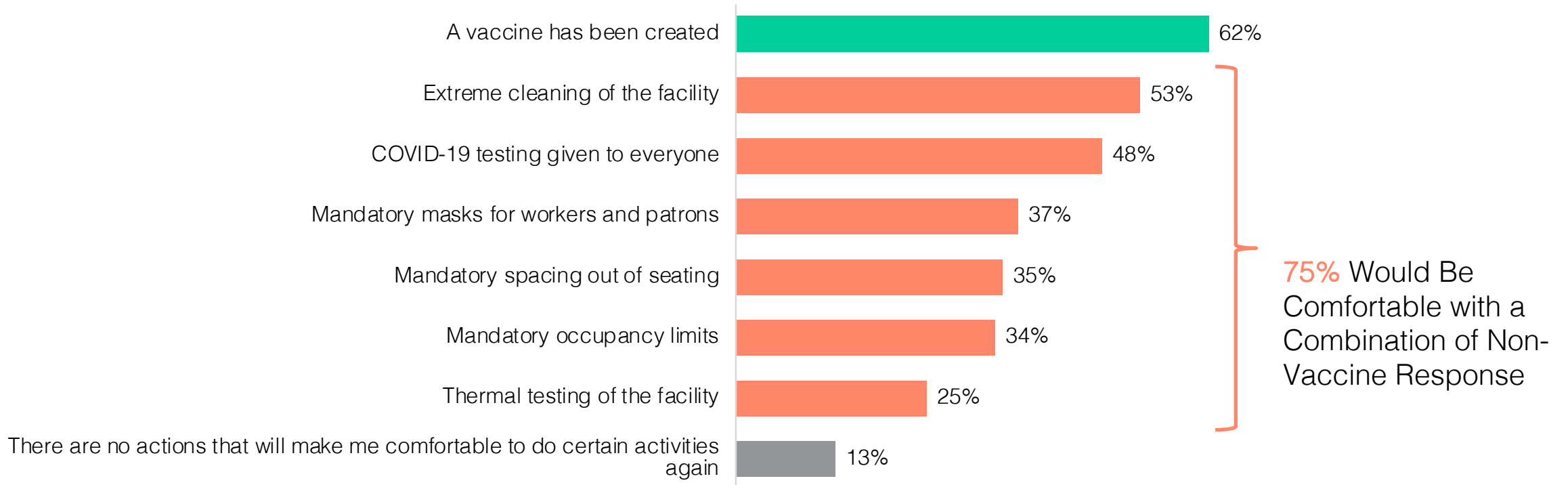


BASE: GENERAL PUBLIC & APPLICABLE RESPONSE W8 (VARIES)  
 Q33B Once the government provides information that the spread of the virus is flattening how long will it take you to do each of the following?  
 Harris Insights & Analytics LLC, A Stagwell Company © 2020



# Almost Two Thirds of Americans Say It Will Take a Vaccine To Be Comfortable in Public Again.

Which of the following actions will make you comfortable to do certain activities again? Please select all that apply.



Source: Harris Poll COVID19 Tracker Wave 2-7

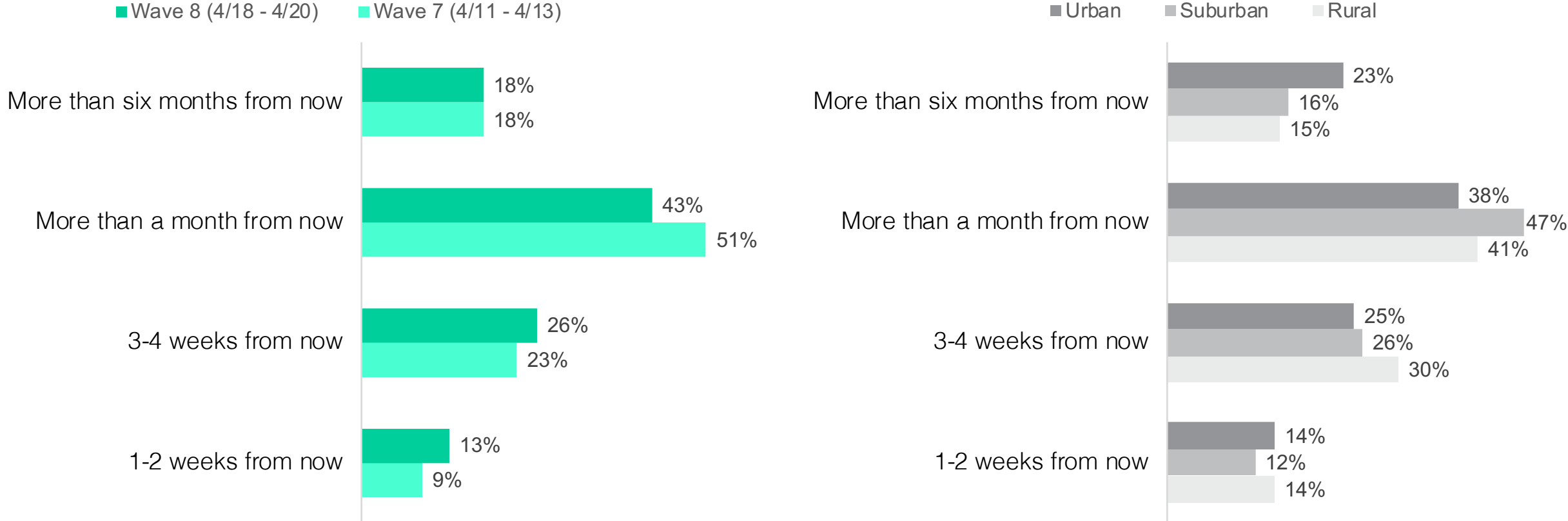
BASE: GENERAL PUBLIC W7 (2013)

BHV02 Which of the following actions will make you comfortable to do certain activities (e.g., fly, go to the gym, go to sporting events, go on a cruise, etc.) again? Please select all that apply.



# Yet There is Growing Desire For Normalcy; Half Think We Should Return A Month From Now

When do you think Americans should start returning to work and life as normal



Source: Harris Poll COVID19 Tracker Wave 2-8  
 BASE: GENERAL PUBLIC W8 (2029)  
 BHV07 Based on what you know and have heard, when do you think Americans should start returning to work and life as normal?.  
 Harris Insights & Analytics LLC, A Stagwell Company © 2020

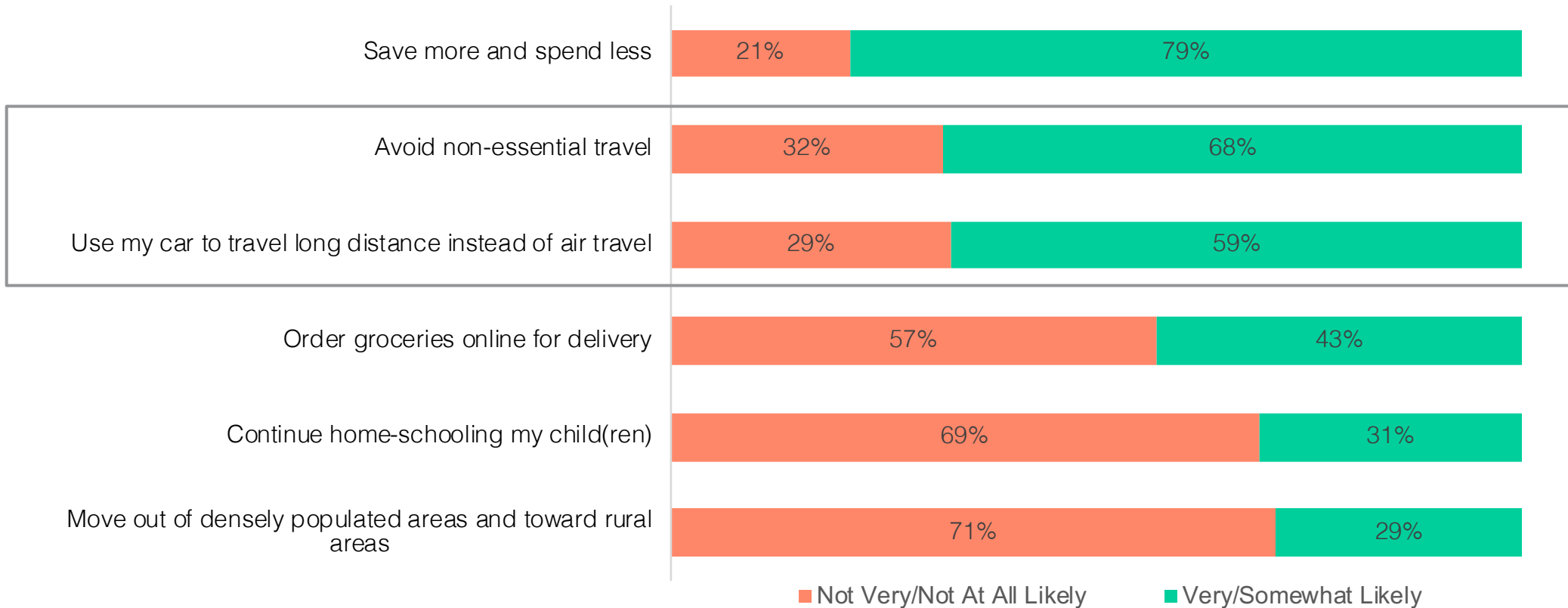


# Who Will Return to Flying First and What Will It Take?



# After the Pandemic Ends, a Majority of Americans Are Likely to Avoid Non-Essential Travel and Use Their Car to Travel Long Distance Instead of Air Travel

How likely are you to do each of the following once the pandemic ends?



Source: Harris Poll COVID19 Tracker Wave 2-8

BASE: GENERAL PUBLIC W8 (2029)

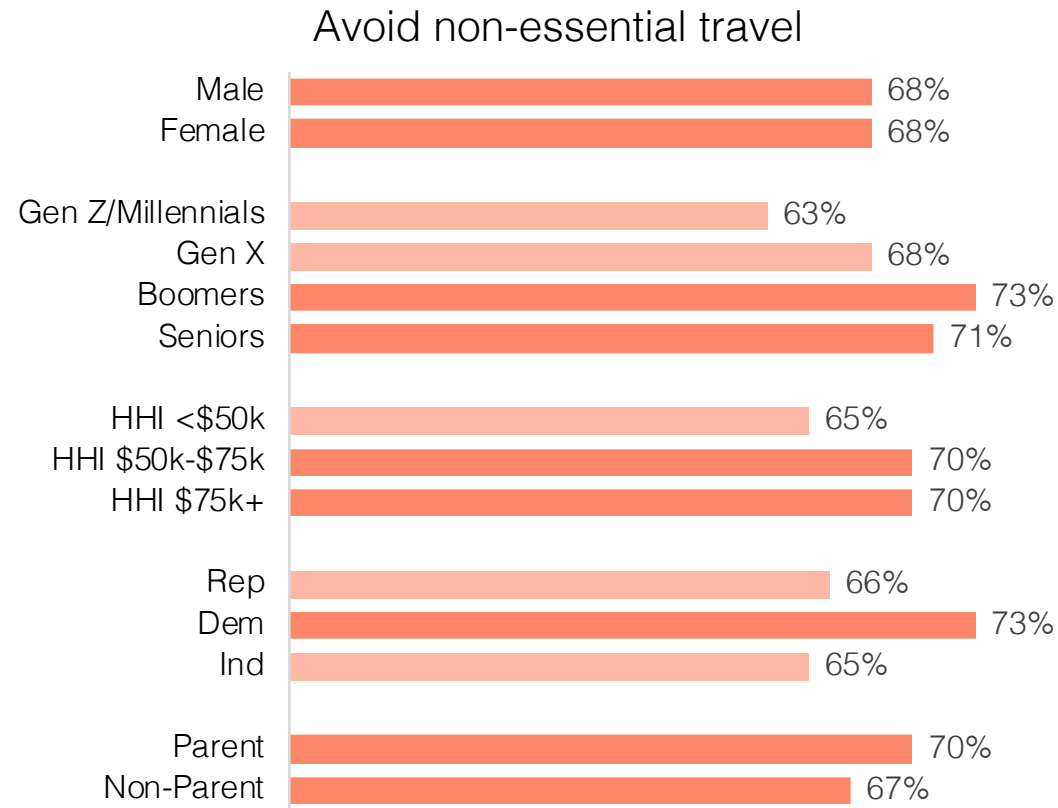
BHV24 How likely are you to do each of the following once the pandemic ends?

Harris Insights & Analytics LLC, A Stagwell Company © 2020



# Boomers/Seniors, Higher Income Earners Are More Likely to Avoid Non-Essential Travel

How likely are you to do each of the following once the pandemic ends?  
**% Very/Somewhat Likely**



Source: Harris Poll COVID19 Tracker Wave 2-8

BASE: GENERAL PUBLIC W8 (2029)

BHV24 How likely are you to do each of the following once the pandemic ends?

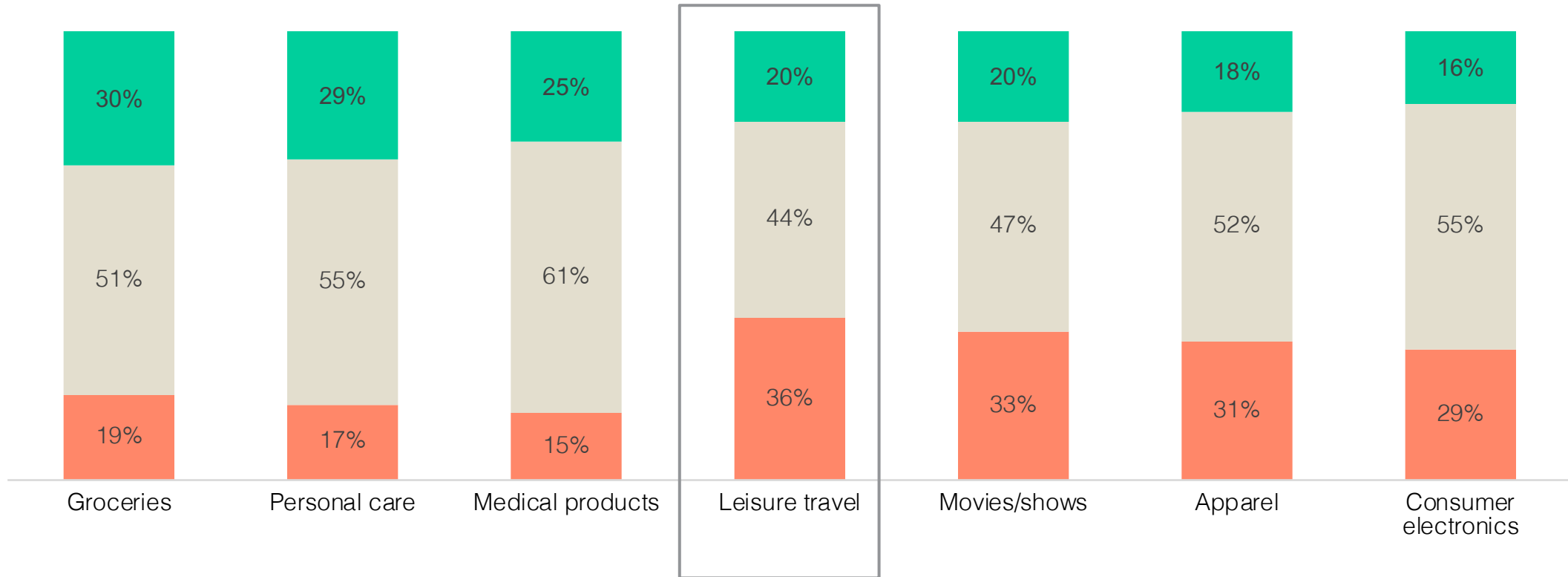
Harris Insights & Analytics LLC, A Stagwell Company © 2020



# More Than 1 in 3 Americans Say They Plan to Spend Less on Leisure Travel Than Before COVID-19

Compared to before COVID-19, how do you anticipate your spending after the pandemic will change, if at all, in each of the following categories?

More No Change Less



Source: Harris Poll COVID19 Tracker Wave 2-8

BASE: GENERAL PUBLIC W8 (2029)

BHV25 Compared to before COVID-19, how do you anticipate your spending after the pandemic will change, if at all, in each of the following categories?

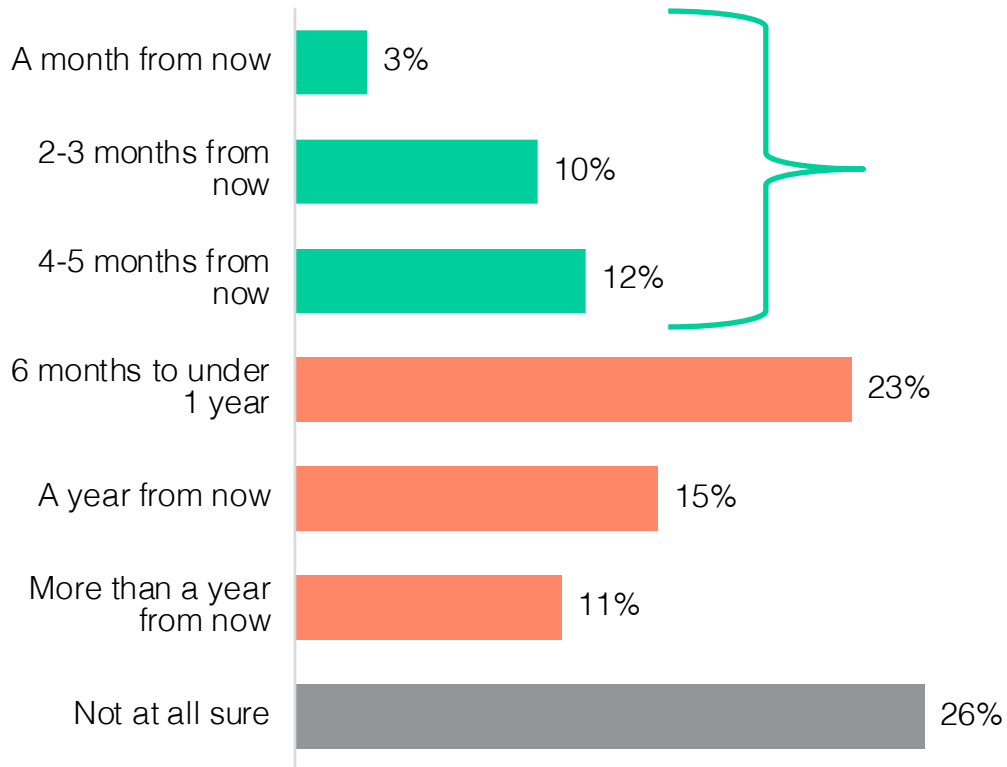
Harris Insights & Analytics LLC, A Stagwell Company © 2020



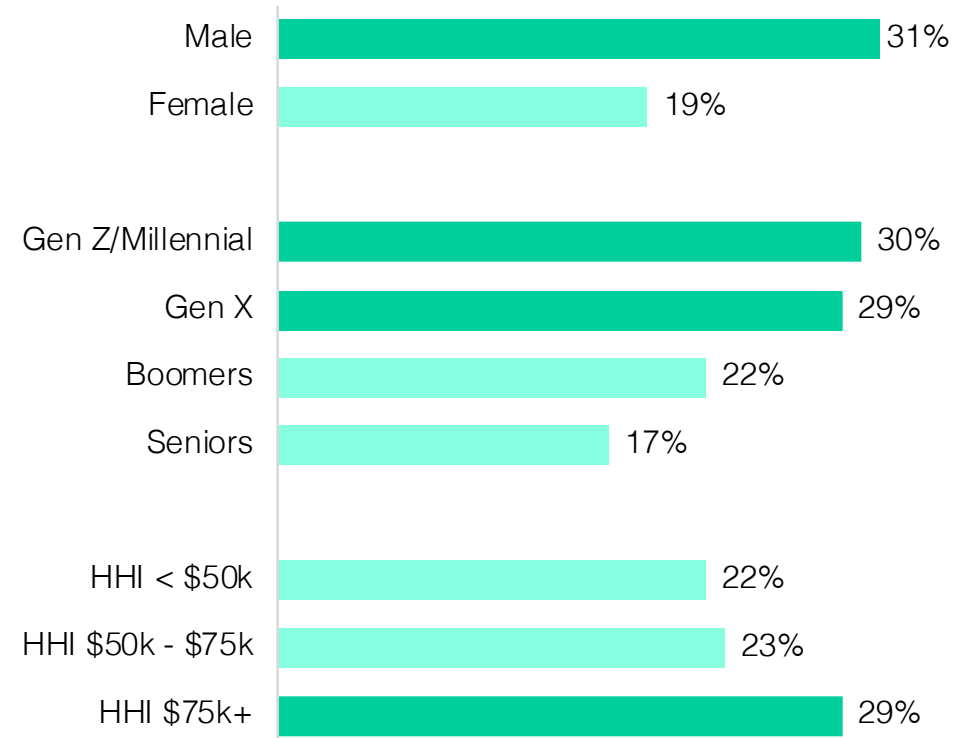


# Many are Unsure/Wary of Planning Vacations but Men, Gen Z/Millennials and Higher Income Households Are More Eager

When do you think you will take your next vacation?



Planning Vacation in Under 6 Months



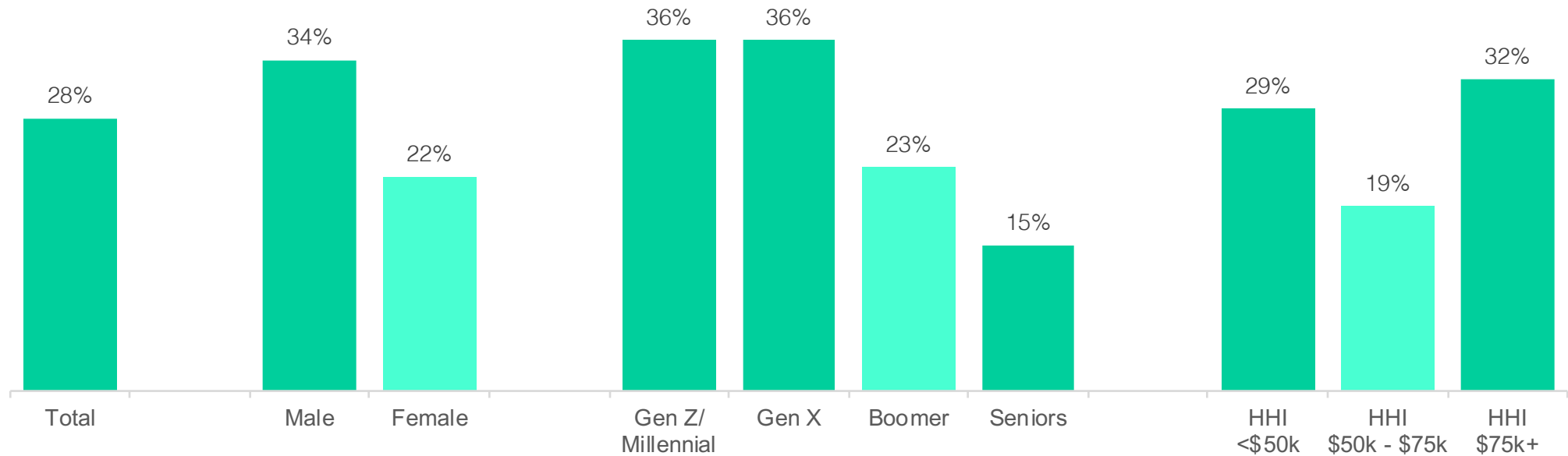
**New Poll Suggests Consumers Wary About Planning Vacations**

Source: Harris Poll COVID19 Tracker Wave 2-8  
BASE: GENERAL PUBLIC W8 (2029)  
BH2020 When do you think you will take your next vacation?  
Harris Insights & Analytics LLC, A Stagwell Company © 2020



# They're Also The Ones Who Want To Return First To Flying ....

Once the government provides information that the spread of the virus is flattening how long will it take you to...  
Fly on a plane  
% Up to 3 Months



Source: Harris Poll COVID19 Tracker Wave 2-8  
BASE: GENERAL PUBLIC W8 (2029)

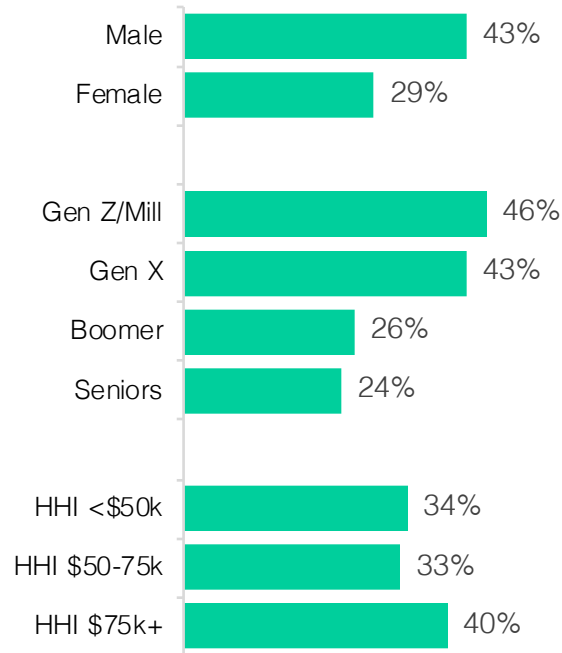
Q33B\_1 Once the government provides information that the spread of the virus is flattening how long will it take you to do each of the following?  
Harris Insights & Analytics LLC, A Stagwell Company © 2020



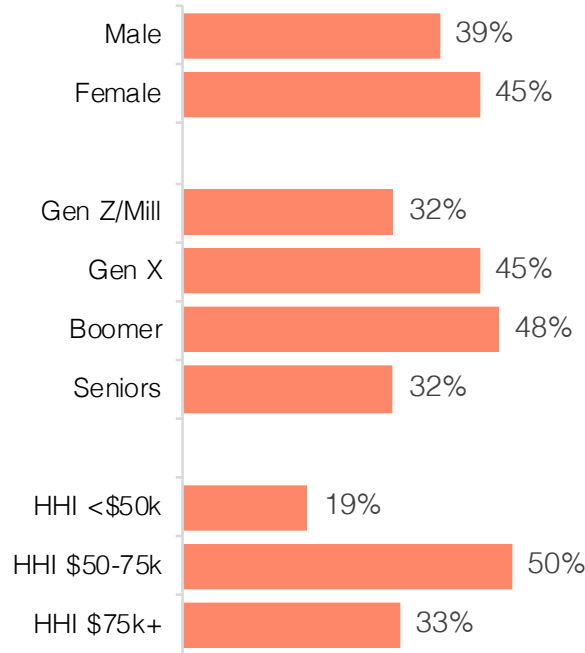
# ...And Other Traveling Activities Such as Hotels, Public Transportation and Restaurants

Once the government provides information that the spread of the virus is flattening how long will it take you to...  
**% Up to 3 Months**

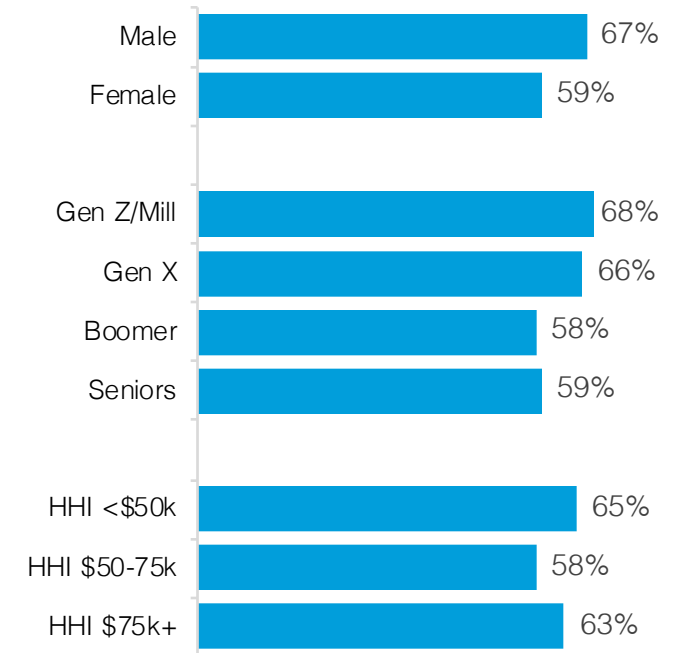
Stay in a hotel



Take public transit



Go out to dinner



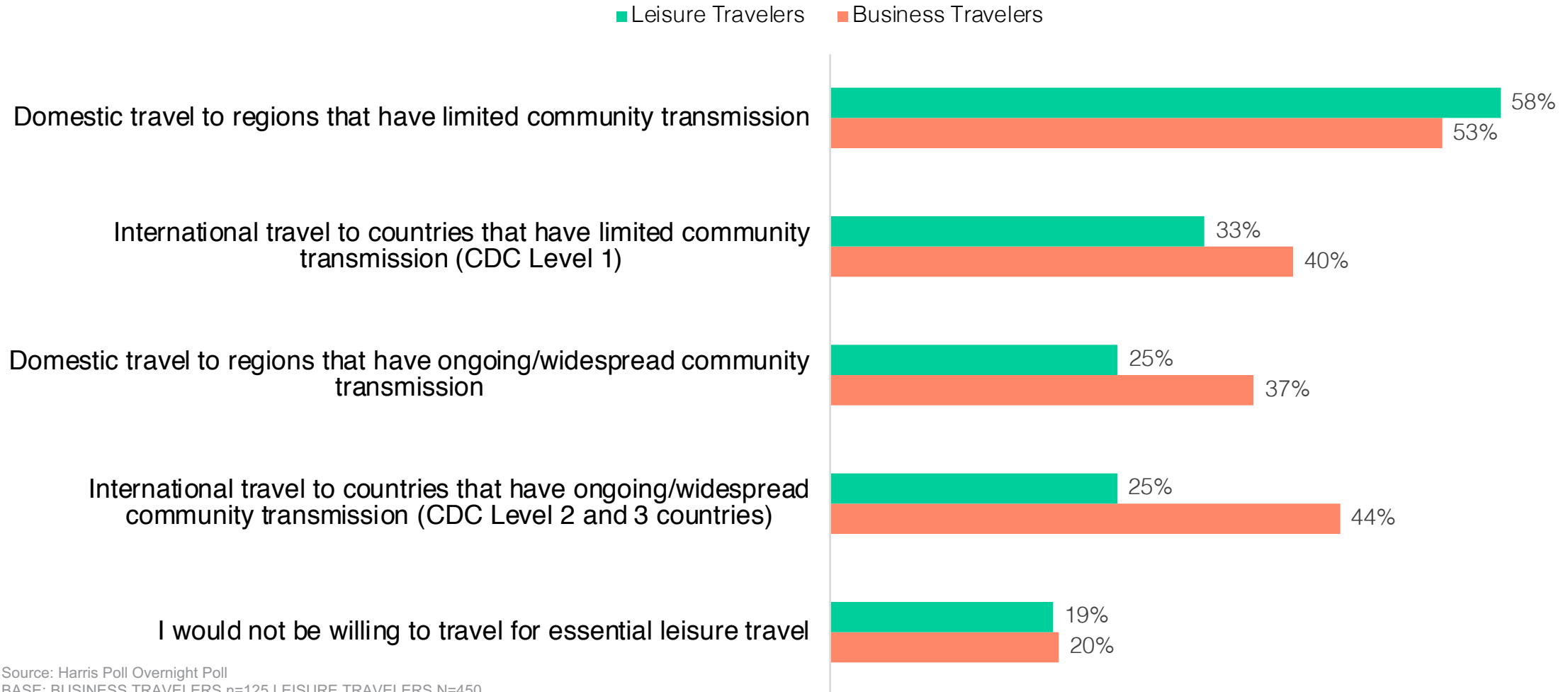
Source: Harris Poll COVID19 Tracker Wave 2-8  
 BASE: GENERAL PUBLIC W8 (2029)

Q33B\_1 Once the government provides information that the spread of the virus is flattening how long will it take you to do each of the following?  
 Harris Insights & Analytics LLC, A Stagwell Company © 2020



# Business Travelers are Willing to Take More Risk for Essential Travel than Leisure Travelers

Which of the following destinations would you be willing to travel to for essential travel after restrictions are lifted for stay-at-home orders and the economy begins to reopen?



Source: Harris Poll Overnight Poll

BASE: BUSINESS TRAVELERS n=125 LEISURE TRAVELERS N=450

Q5B: Which of the following destinations would you be willing to travel to for essential business travel after restrictions are lifted for stay-at-home orders and the economy begins to reopen? Please select all that apply.

Harris Insights & Analytics LLC, A Stagwell Company © 2020



# What's Essential for Business Travelers: New Business, On-Site Quality Control and Client Meetings

After restrictions related to COVID19 are lifted for stay-at-home orders and the economy begins to reopen, what will you consider essential vs. non-essential business travel?

## % Essential Travel

■ Business Travelers



Source: Harris Poll Overnight Poll  
BASE: BUSINESS TRAVELERS n=125

Q3: After restrictions related to COVID19 are lifted for stay-at-home orders and the economy begins to reopen, what will you consider essential vs. non-essential business travel?  
Harris Insights & Analytics LLC, A Stagwell Company © 2020

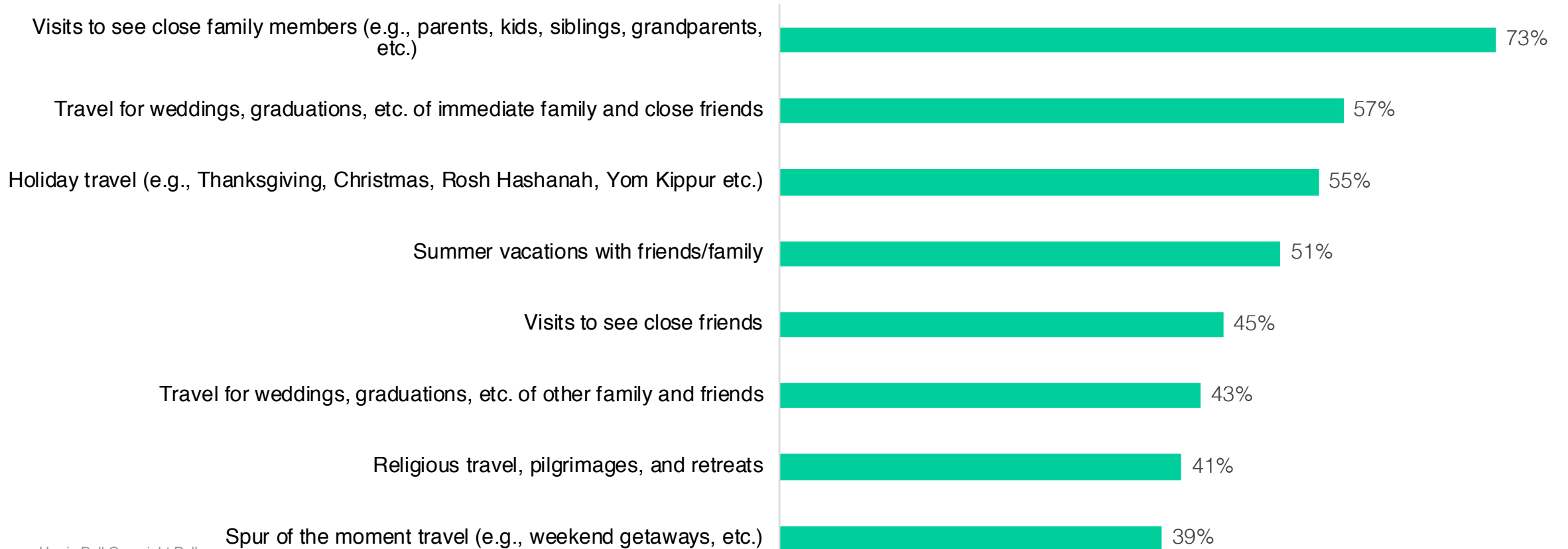


# What's Essential for Leisure Travelers: Family, Weddings, and Holidays

After restrictions related to COVID19 are lifted for stay-at-home orders and the economy begins to reopen, what will you consider essential vs. non-essential leisure travel?

## % Essential Travel

■ Leisure Travelers



Source: Harris Poll Overnight Poll

BASE: LEISURE TRAVELERS n=450

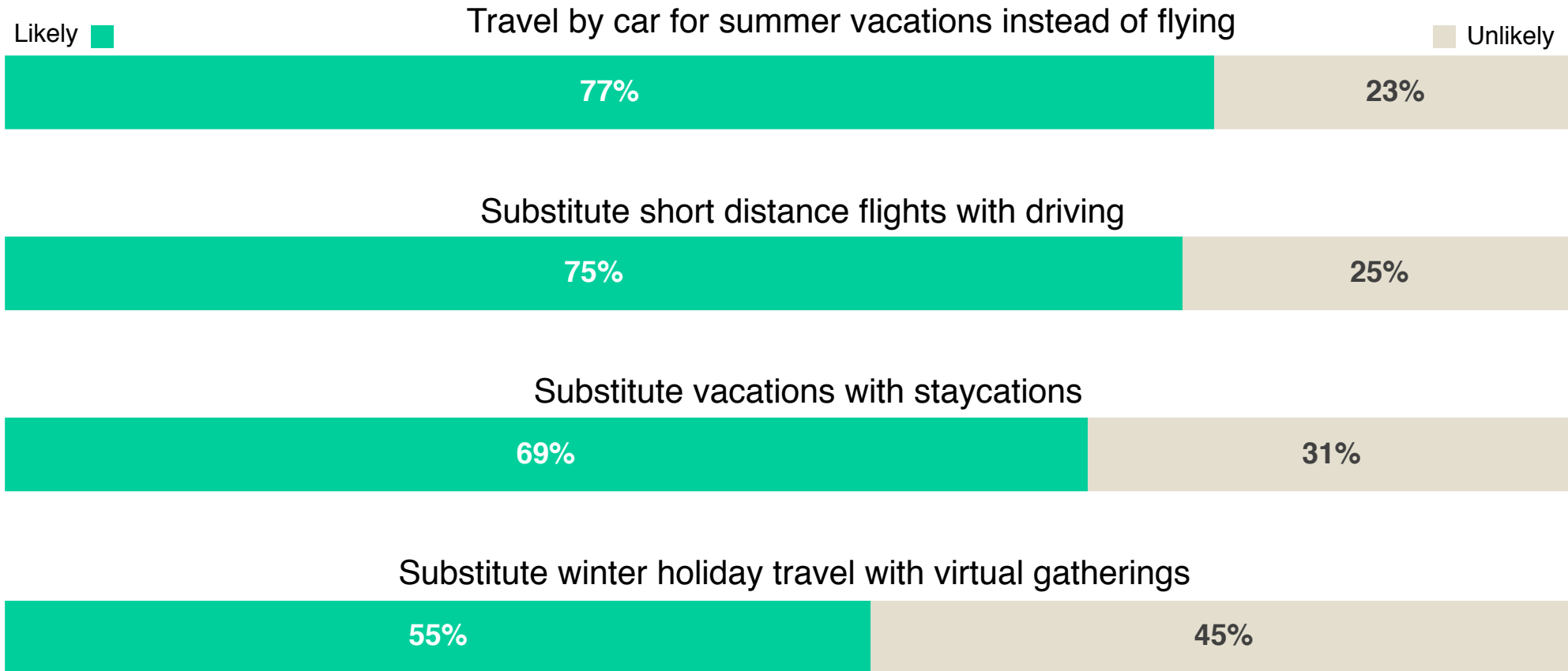
Q3: After restrictions related to COVID19 are lifted for stay-at-home orders and the economy begins to reopen, what will you consider essential vs. non-essential business travel?

Harris Insights & Analytics LLC, A Stagwell Company © 2020



# Leisure Travelers Will Likely Substitute Flying with Road Trip Vacations and Car Travel for Short Distance Flights

As you look out on the remainder of this year, are you likely or unlikely to take the following actions?  
(Leisure Travelers)



Source: Harris Poll Overnight Poll

BASE: LEISURE TRAVELERS n=450

Q3: After restrictions related to COVID19 are lifted for stay-at-home orders and the economy begins to reopen, what will you consider essential vs. non-essential business travel?

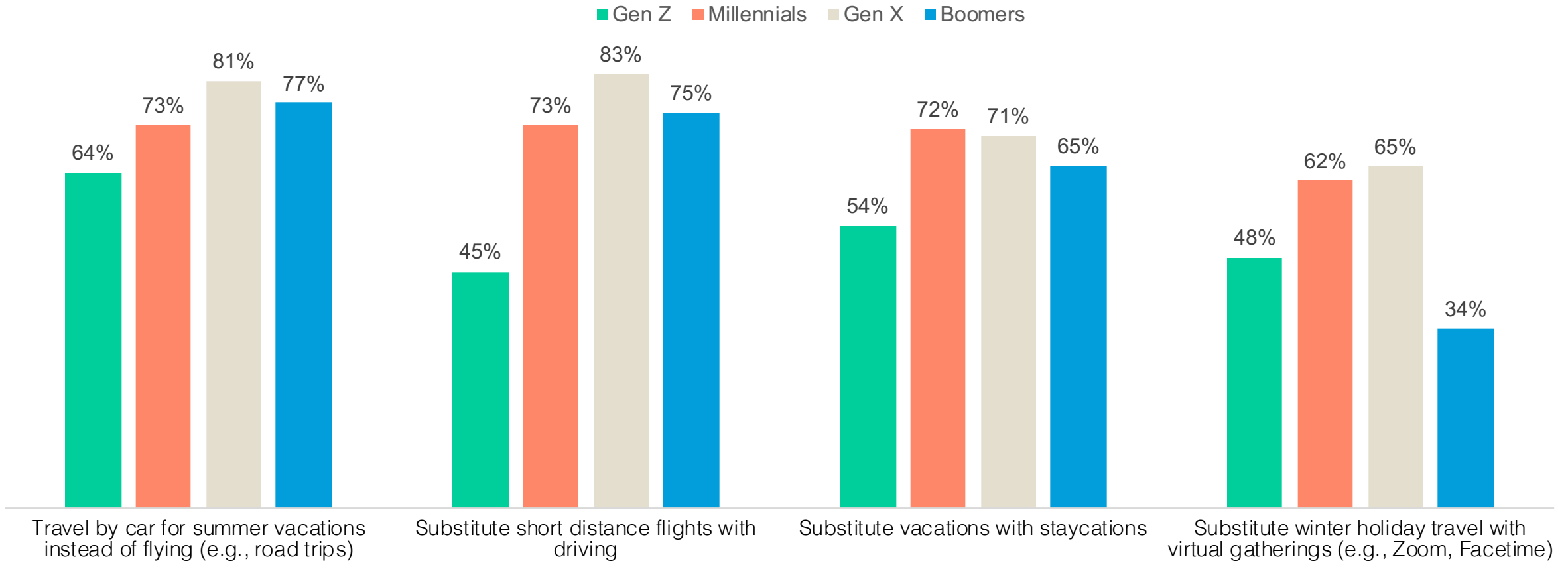
Harris Insights & Analytics LLC, A Stagwell Company © 2020





# Gen Z Leisure Travelers Are Least Likely to Substitute Flying with Car Travel

As you look out on the remainder of this year, are you likely or unlikely to take the following actions?  
(% Likely Leisure Travelers)



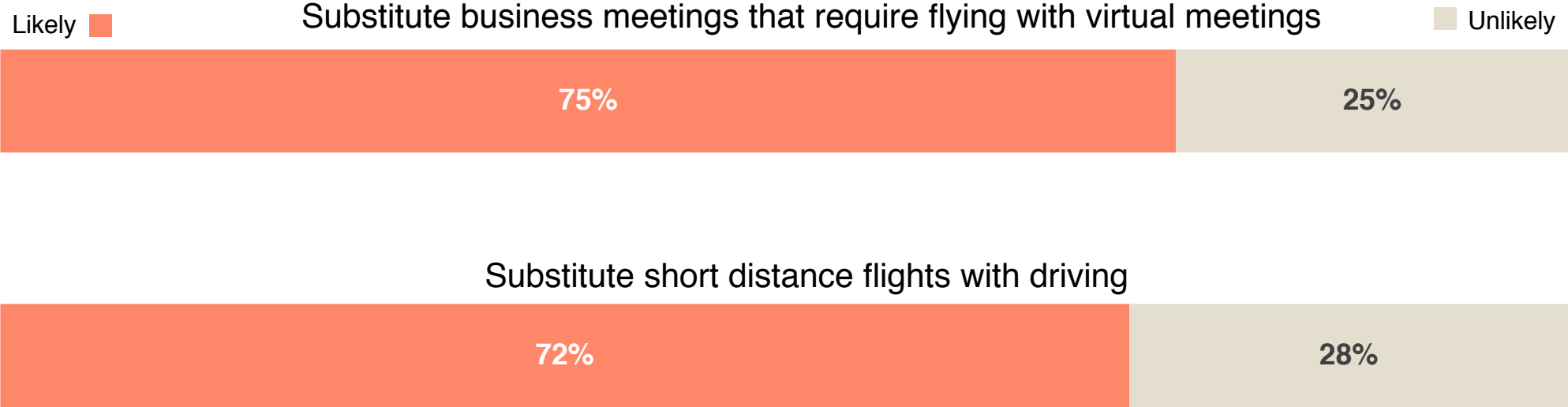
Source: Harris Poll Overnight Poll  
BASE: LEISURE TRAVELERS n=450

Q3: After restrictions related to COVID19 are lifted for stay-at-home orders and the economy begins to reopen, what will you consider essential vs. non-essential business travel?  
Harris Insights & Analytics LLC, A Stagwell Company © 2020



# Business Travelers Will Likely Cut Flights for Zoom Meetings and Drive for Short Distances

As you look out on the remainder of this year, are you likely or unlikely to take the following actions?  
(Business Travelers)



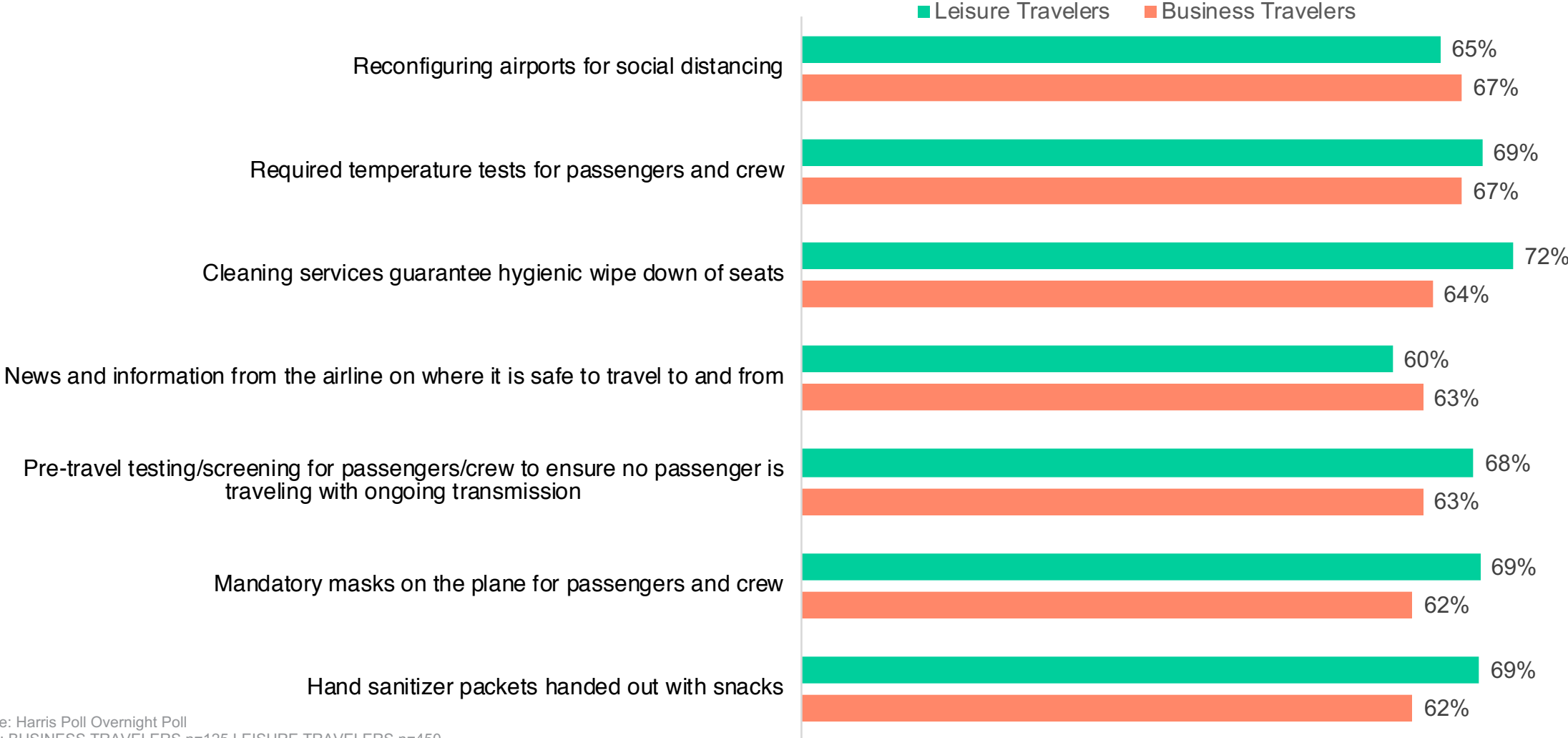
Source: Harris Poll Overnight Poll  
BASE: BUSINESS TRAVELERS n=125

Q3: After restrictions related to COVID19 are lifted for stay-at-home orders and the economy begins to reopen, what will you consider essential vs. non-essential business travel?  
Harris Insights & Analytics LLC, A Stagwell Company © 2020



# What Can Airlines Do? Reconfigure Airports for Social Distancing, Temperature Tests and Tracing

Are you more or less likely to travel with an airline if the airline took the following actions to make flying safer during the COVID19 pandemic?



Source: Harris Poll Overnight Poll  
BASE: BUSINESS TRAVELERS n=125 LEISURE TRAVELERS n=450

Q3: After restrictions related to COVID19 are lifted for stay-at-home orders and the economy begins to reopen, what will you consider essential vs. non-essential business travel?  
Harris Insights & Analytics LLC, A Stagwell Company © 2020



## As Well As Pre-travel Screenings, No Middle Seats (And Even Razors)

Are you more or less likely to travel with an airline if the airline took the following actions to make flying safer during the COVID19 pandemic?



Source: Harris Poll Overnight Poll

BASE: BUSINESS TRAVELERS n=125 LEISURE TRAVELERS n=450

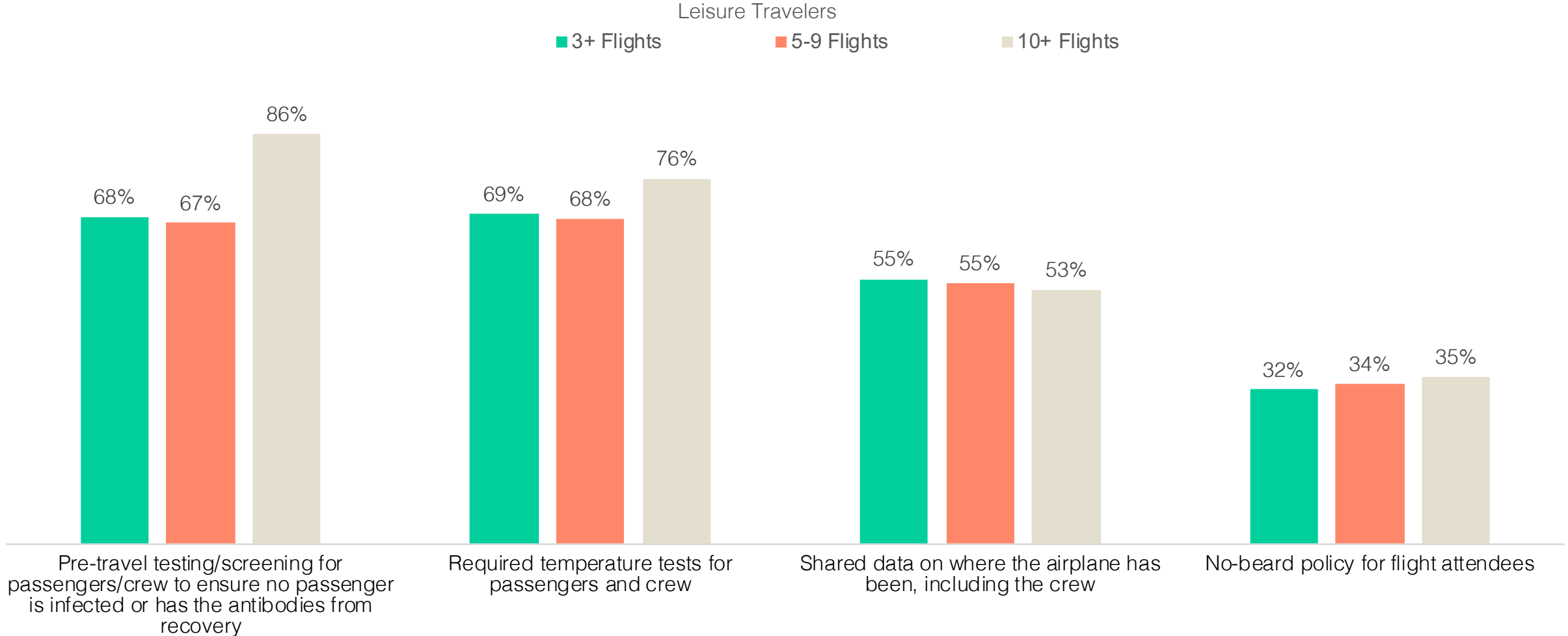
Q3: After restrictions related to COVID19 are lifted for stay-at-home orders and the economy begins to reopen, what will you consider essential vs. non-essential business travel?

Harris Insights & Analytics LLC, A Stagwell Company © 2020



# More Frequent Fliers Are More Likely to Travel if Pre-Travel Testing/Screening and Required Temperature Checks Take Place

Are you more or less likely to travel with an airline if the airline took the following actions to make flying safer during the COVID19 pandemic?



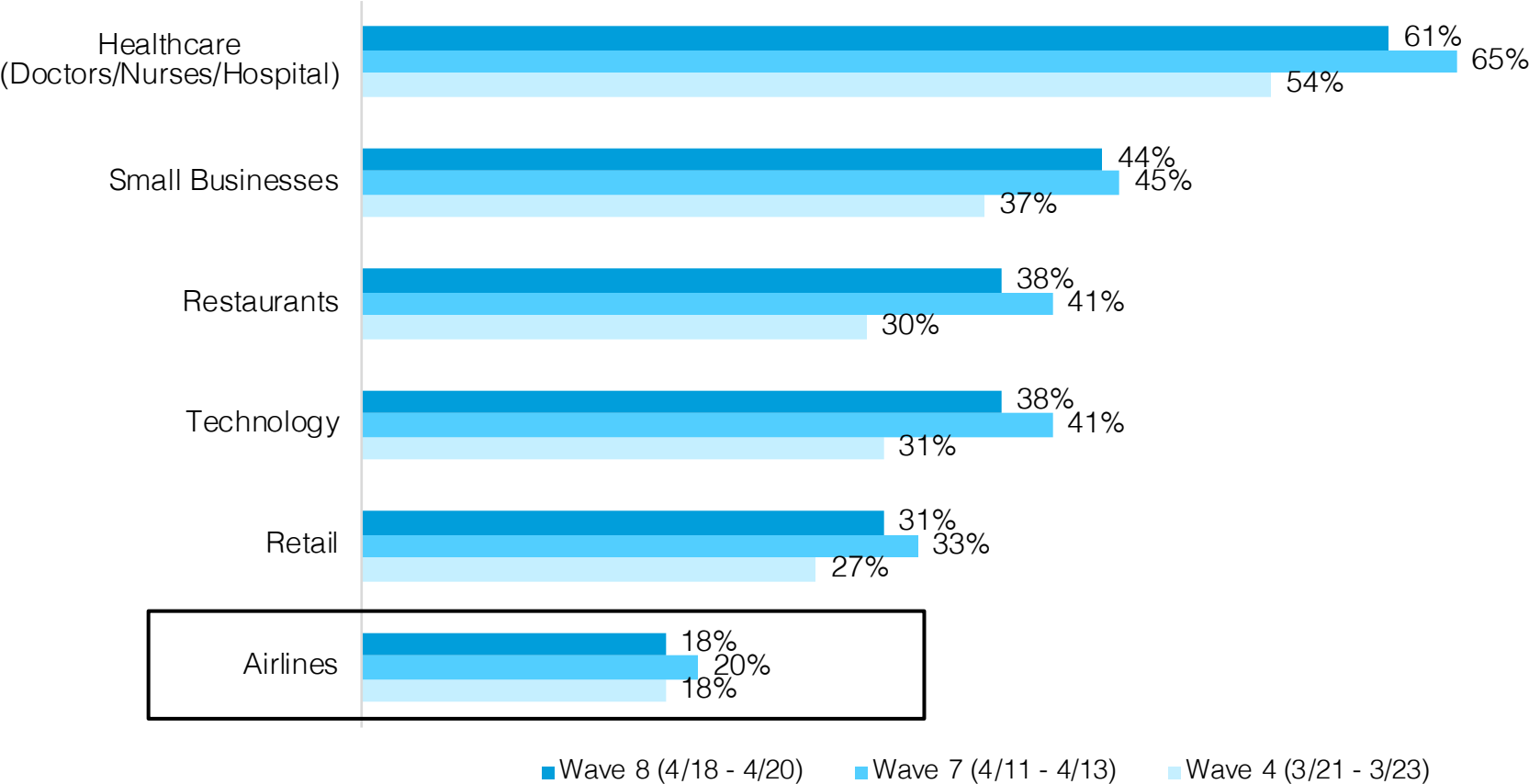
Source: Harris Poll Overnight Poll  
BASE: BUSINESS TRAVELERS n=125 LEISURE TRAVELERS n=450

Q3: After restrictions related to COVID19 are lifted for stay-at-home orders and the economy begins to reopen, what will you consider essential vs. non-essential business travel?  
Harris Insights & Analytics LLC, A Stagwell Company © 2020



# Airlines Do Not Receive the Same Positive Sentiment as More Struggling Industries...

Feel More Positive Toward Industry Since Start Of Coronavirus Pandemic

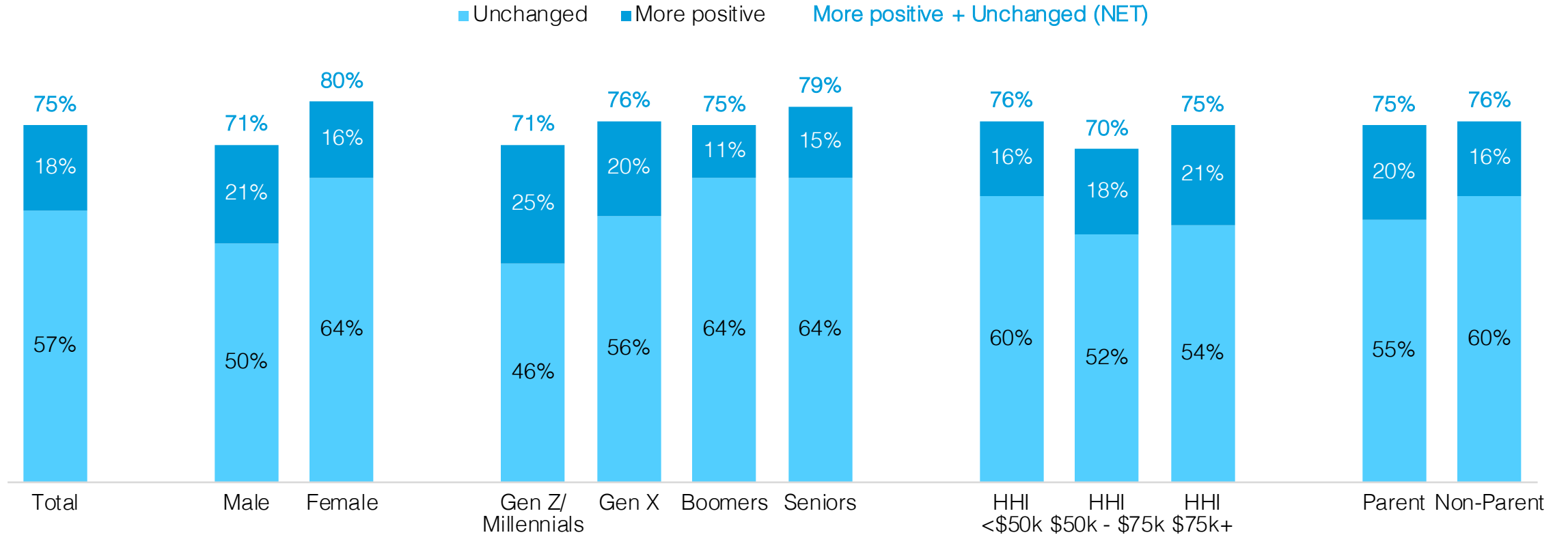


Source: Harris Poll COVID19 Tracker Wave 2-8  
 BASE: GENERAL PUBLIC W4 (2023) W7 (2013; W8 (2029)  
 Q38 How has your view of each of the following industries changed since the start of the coronavirus pandemic?  
 Harris Insights & Analytics LLC, A Stagwell Company © 2020



# But Americans Acknowledge It Is Not The Airlines' Fault; Half or More Say Their Opinion of Airlines Is Unchanged and About 1 in 5 Say They View the Industry More Positively

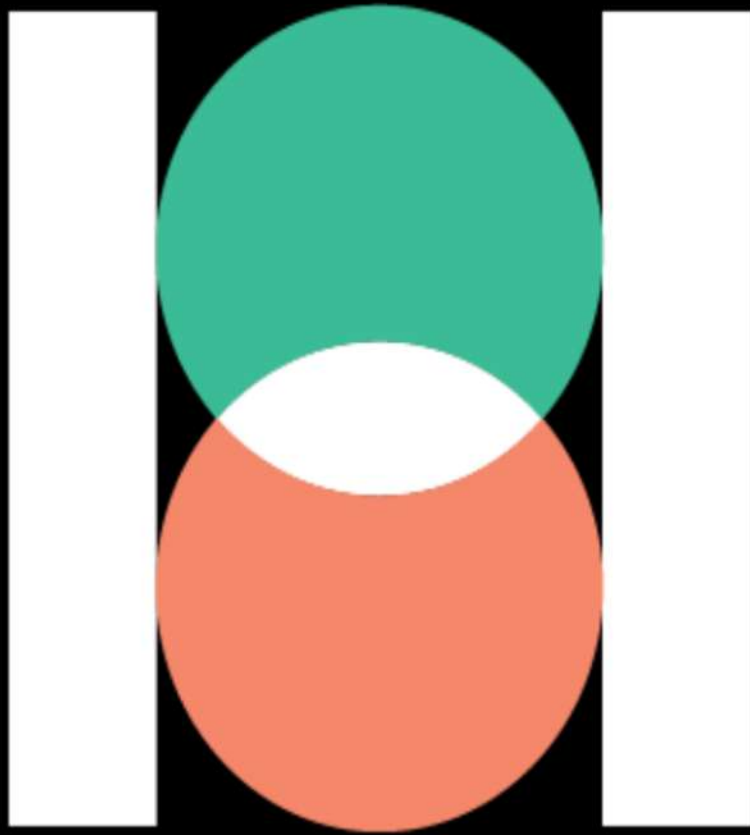
How View of **Airlines** Has Changed Since Start of Coronavirus Pandemic



Source: Harris Poll COVID19 Tracker Wave 2-8  
 BASE: GENERAL PUBLIC W8 (2029)

Q38 How has your view of each of the following industries changed since the start of the coronavirus pandemic?





John Gerzema, CEO  
[jgerzema@harrisinsights.com](mailto:jgerzema@harrisinsights.com)