

MARKET INSIGHTS: 2020 ELECTION EDITION



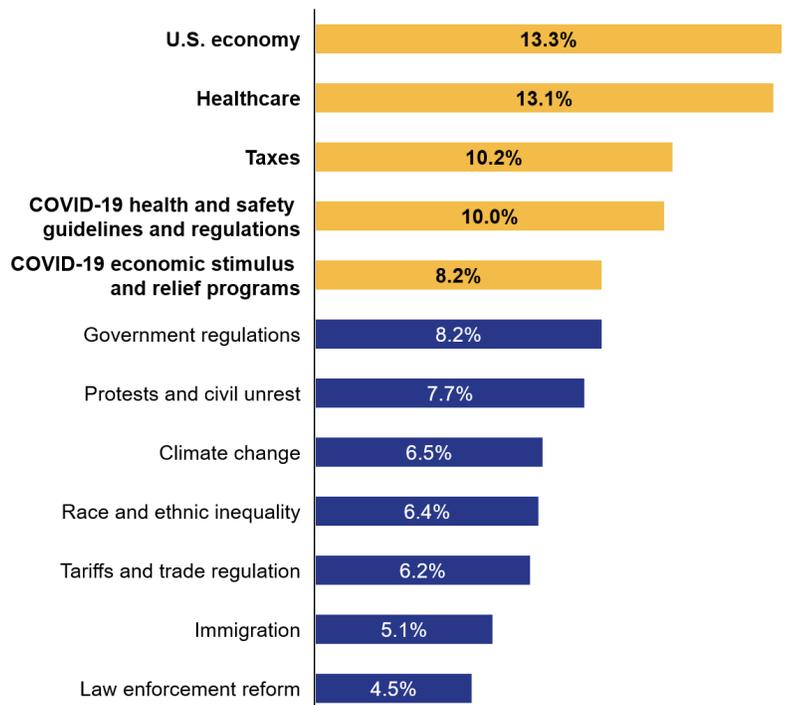
ECP INSIGHTS

The U.S. economy, healthcare and taxes were the most important issues for ECPs and their businesses during the 2020 U.S. Presidential Election

In the lead-up to the U.S. Presidential Election, we asked ECPs which issues were important when thinking about the election. The U.S. economy, healthcare and taxes were the top 3 responses, with COVID-19 related issues – including health and safety guidelines and regulations and economic stimulus and relief programs – rounding out the top 5 most important issues.

Q: Which issues are important to your business when thinking about the U.S. Presidential Election? (Figures will not sum to 100%, because multiple selections allowed.)

Source: The Vision Council COVID-19 US ECP Panel Study, 10/12-10/17/2020, n = 843

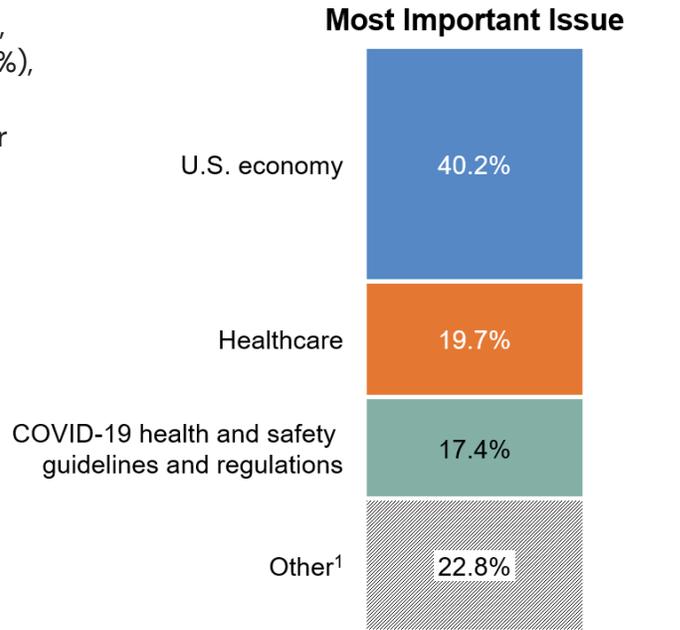


When asked what single issue was the most important, the majority of ECPs indicated the U.S. economy (40.2%), followed by Healthcare (19.7%), and COVID-19 health and safety guidelines and regulations (17.4%). The other individual issues fell off significantly from that point with each issue only receiving low to mid-single digit percentage responses.

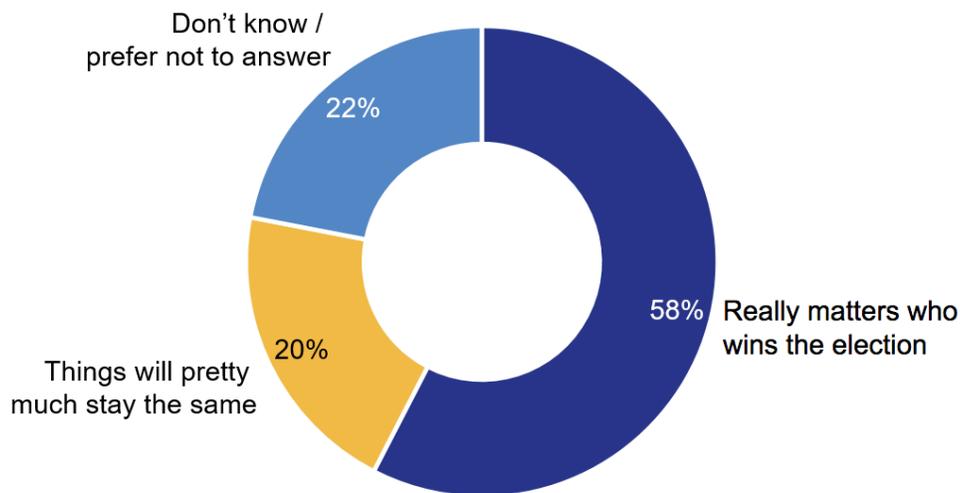
Q: Of those issues that you identified as important to your business operations, which is the MOST important issue when thinking about the 2020 U.S. Presidential Election?

¹Sum of all other responses.

Source: The Vision Council COVID-19 US ECP Panel Study, 10/12-10/17/2020, n = 132



Majority of ECPs believe that it matters to their business who wins the U.S. Presidential Election

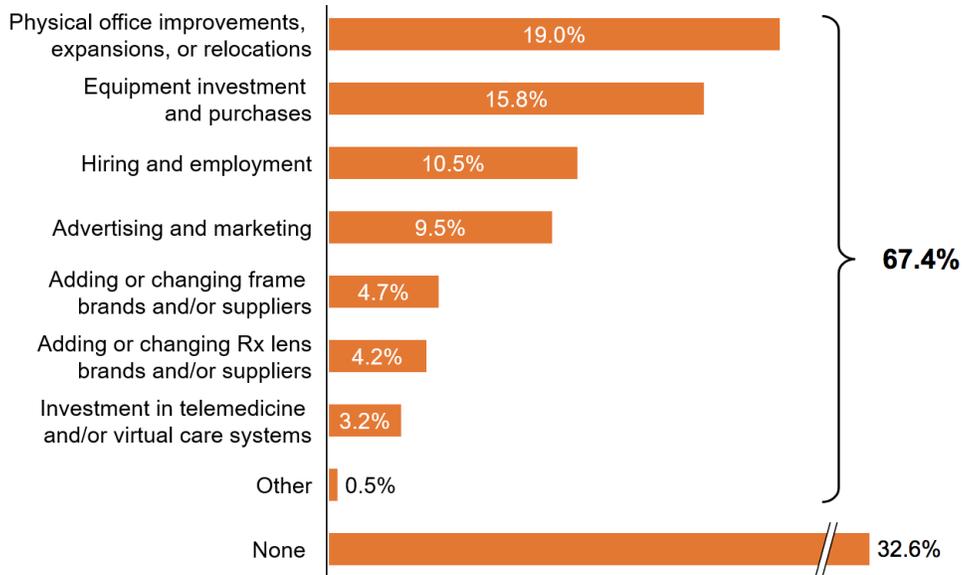


Most ECPs (58%) believe that it really matters who wins the election as it pertains to making progress on the important issues that are facing their businesses. The remainder of ECPs are nearly equally split between those who believe things will stay the same (20%) or simply don't know or prefer not to answer (22%).

Q: As far as making progress on the important issues facing your business is concerned, does it really matter who wins the 2020 presidential election, or will things pretty much be the same regardless of who is elected president?

Source: The Vision Council COVID-19 US ECP Panel Study, 10/12-10/17/2020, n = 132

Many ECPs are delaying business decisions until after the election is finalized

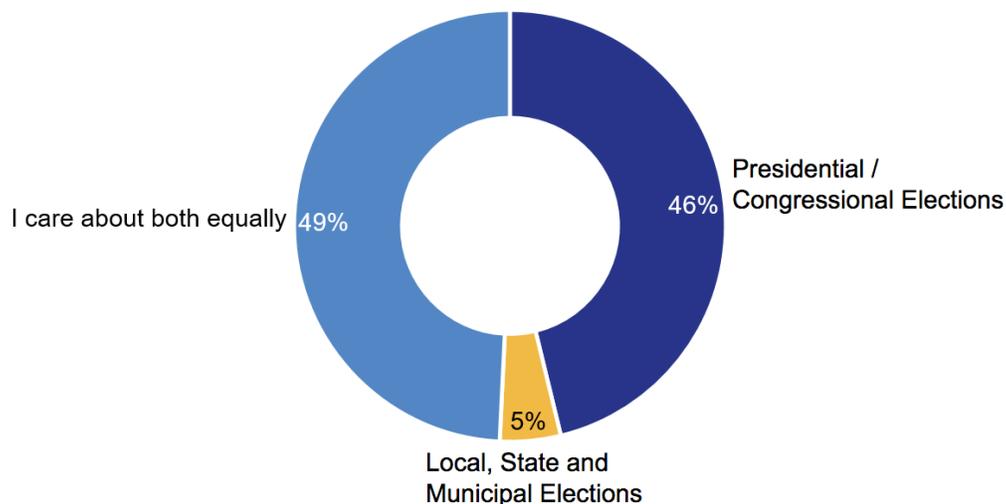


It is clear from our surveys that there are important business issues that influence ECPs voting behavior and that who is elected president matters to their businesses. The impact of the election on optical business operations is also evident in that two-thirds of ECPs (67.4%) indicated that they are delaying specific business decisions until the conclusion of the U.S. Presidential Election. Office improvements or relocations, equipment purchases, and hiring decisions are the top three specific business decisions that ECPs are delaying until the election process is completed.

Q: Are there any of the business decisions below being postponed until the conclusion of the 2020 Presidential Election?

Source: The Vision Council COVID-19 US ECP Panel Study, 10/12-10/17/2020, n = 190

ECPs are concerned about results for both federal and local elections



While national politics is at the forefront of people's minds and the focus of nonstop media coverage, the majority of ECPs surveyed indicated that they care equally about both the U.S. Presidential and Congressional Elections, and Local, State, and Municipal Elections (49%).

Q: As far as making progress on the important issues facing your business is concerned, does it really matter who wins the 2020 presidential election, or will things pretty much be the same regardless of who is elected president?

Source: The Vision Council COVID-19 US ECP Panel Study, 10/12-10/17/2020, n = 132