WHAT IT WILL TAKE TO GET AMERICANS TO TRAVEL

Public opinion insights from late April 2020 “Back-to-Normal Barometer”

RON BONJEAN, PARTNER, ROKK SOLUTIONS
RICH THAU, PRESIDENT OF ENGAGIOUS
JON LAST, PRESIDENT OF SPORTS & LEISURE RESEARCH GROUP
GINA DERICKSON, RESEARCH DIRECTOR OF ENGAGIOUS
THREE MORE QUESTIONS

• Sharp executives are asking these “back-to-normal” Qs:
  ▪ What external assurances will lure customers back?
  ▪ Which “OK to proceed” signals do my employees need to display?
  ▪ How willing are our guests/customers to be monitored?

• We just surveyed 518 American adults who participate in sports, leisure, travel, and consumer activities
  ▪ Also conducted 10 IDIs April 23 & 24, 2020
In which of the following leisure activities have you participated over the past 12 months?

- Eat at a restaurant: 85%
- Visit a retail store: 77%
- See a movie: 68%
- Take a trip that included 50+ miles and 1+ nights in a hotel: 59%
- Attend a live sports event: 58%
- Exercise at a gym: 52%
- Take a commercial flight: 40%
- Visit a casino: 35%
- Visit a theme park: 35%
- Attend a conference or convention: 26%
- Take a cruise vacation: 20%

N=518, Back to Normal Barometer - April 22, 2020
WHERE WE STAND RIGHT NOW
SLIGHT UPTICK IN CONFIDENCE

Confidence Barometer

Current Conditions

Future Expectations

Wave 1 → Wave 2 change
WHAT ARE CONSUMERS MOST CONCERNED ABOUT?

- **PERSONAL**
  - Potential to contract COVID-19: 52%
  - Personal Finances: 48%

- **SOCIETAL**
  - The overall public health crisis: 64%
  - The U.S. Economy: 66%

*Percentage who said they are extremely concerned
n=518 Back to Normal Barometer - April 22, 2020
SLIGHT UPTICK IN “READY TO RETURN NOW”

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

- Take a cruise: 39% (Apr. 1, 2020) vs. 53% (Apr. 22, 2020)
- Stay at a hotel: 39% (Apr. 1, 2020) vs. 33% (Apr. 22, 2020)
- Attend a live sporting event: 34% (Apr. 1, 2020) vs. 37% (Apr. 22, 2020)
- Visit a casino: 34% (Apr. 1, 2020) vs. 37% (Apr. 22, 2020)
- Visit a theme park: 33% (Apr. 1, 2020) vs. 39% (Apr. 22, 2020)
- See a movie in a theater: 32% (Apr. 1, 2020) vs. 35% (Apr. 22, 2020)
- Fly commercially: 32% (Apr. 1, 2020) vs. 34% (Apr. 22, 2020)

N=518, Back to Normal Barometer - April 22, 2020; N=511, April 1, 2020
THERE’S MORE THEY’RE WILLING TO DO

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

- Visit a retail store: 61%
- Exercise at a gym: 46%
- Eat at a restaurant: 44%
- Attend a conference or convention: 37%

N=518, Back to Normal Barometer - April 22, 2020
UPTICK CASE STUDY: GOLF

- Played golf within the last two weeks:
  - Apr. 1, 2020: 27%
  - Apr. 22, 2020: 35%

- Percentage who strongly agree:
  - Apr. 1, 2020: 49%
  - Apr. 22, 2020: 53%

- Golf courses should remain open for play, as long as social distancing and other precautions are encouraged:
  - Apr. 1, 2020: 20%
  - Apr. 22, 2020: 40%

n=115, Back to Normal Barometer - April 1, 2020
n=114, Back to Normal Barometer - April 22, 2020
BUT THERE’S STILL A VERY LONG WAY TO GO

*Percentage of respondents who say they strongly agree.
n=518, Back to Normal Barometer - April 22, 2020

- 37% I’m concerned about losing my job or being furloughed
- 30% The country will again be "open for business" before June
WHICH ASSURANCES WILL RE-ENGAGE?
Hotels
SOME ASSURANCES REALLY MATTER A LOT

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

- Approval of a COVID-19 vaccine: 39%
- Approval of a pharmaceutical protocol to mitigate the effects of COVID-19: 16%
- Assurance from a friend or family member who has just completed this activity: 11%
- Assurance from a reputed national medical authority that it is safe to do so: 25%
- Assurance from the Property that it is safe to do so: 9%
- Assurance from the U.S. Government that it is safe to do so: 16%
- Assurance that customer-facing employees are required to be tested for COVID-19: 13%

N=200, Back to Normal Barometer - April 22, 2020
MORE THAN ONE ASSURANCE IS VITAL

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

- Approval of a COVID-19 vaccine: 48% alone, 39% with at least one other item
- Approval of a pharmaceutical protocol to mitigate the effects of COVID-19: 57% alone, 16% with at least one other item
- Assurance from a friend or family member who has just completed this activity: 38% alone, 11% with at least one other item
- Assurance from a reputed national medical authority that it is safe to do so: 54% alone, 25% with at least one other item
- Assurance from the Property that it is safe to do so: 48% alone, 9% with at least one other item
- Assurance from the U.S. Government that it is safe to do so: 50% alone, 16% with at least one other item
- Assurance that customer-facing employees are required to be tested for COVID-19: 58% alone, 13% with at least one other item

N=200, Back to Normal Barometer - April 22, 2020
# Some Assurances Are Meaningless

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

<table>
<thead>
<tr>
<th>Assurance</th>
<th>This would NOT EVEN PARTIALLY impact my decision one way or another</th>
<th>I would need this occurrence/condition PLUS at least one other item on this list</th>
<th>This ALONE would be sufficient assurance for me</th>
</tr>
</thead>
<tbody>
<tr>
<td>Approval of a COVID-19 vaccine</td>
<td>39%</td>
<td>14%</td>
<td>48%</td>
</tr>
<tr>
<td>Approval of a pharmaceutical protocol to mitigate the effects of COVID-19</td>
<td>16%</td>
<td>28%</td>
<td>57%</td>
</tr>
<tr>
<td>Assurance from a friend or family member who has just completed this activity</td>
<td>11%</td>
<td>52%</td>
<td>38%</td>
</tr>
<tr>
<td>Assurance from a reputed national medical authority that it is safe to do so</td>
<td>25%</td>
<td>22%</td>
<td>54%</td>
</tr>
<tr>
<td>Assurance from the Property that it is safe to do so</td>
<td>48%</td>
<td>44%</td>
<td>9%</td>
</tr>
<tr>
<td>Assurance from the U.S. Government that it is safe to do so</td>
<td>50%</td>
<td>34%</td>
<td>16%</td>
</tr>
<tr>
<td>Assurance that customer-facing employees are required to be tested for COVID-19</td>
<td>58%</td>
<td>30%</td>
<td>13%</td>
</tr>
</tbody>
</table>

N=200, Back to Normal Barometer - April 22, 2020
DEEP DIVE: WHO’S ASSURED BY A VACCINE?

• Highest-scoring stand-alone assurance: Vaccine at 39%

• Over indexes for:
  ▪ Men
  ▪ Live in urban areas
  ▪ Age 35-64
  ▪ Independents
  ▪ Northeast Census Region
  ▪ Business Travelers
WITH ASSURANCES, 57% 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: 11%
- Within one month: 15%
- Within two months: 14%
- Within three months: 17%
- Within six months to a year: 13%
- More than a year out: 9%
- Within 3-6 months: 21%

N=299, Back to Normal Barometer - April 22, 2020
SOME ASSURANCES REALLY MATTER A LOT

Which of these singular occurrences (alone or in conjunction with something else) would make you comfortable to visit a theme park, without hesitation?

- Approval of a COVID-19 vaccine: 37%
- Approval of a pharmaceutical protocol to mitigate the effects of COVID-19: 25%
- Assurance from a friend or family member who has just completed this activity: 7%
- Assurance from a reputed national medical authority that it is safe to do so: 23%
- Assurance from the theme park that it is safe to do so: 10%
- Assurance from the U.S. Government that it is safe to do so: 23%
- Assurance that customer-facing employees are required to be tested for COVID-19: 14%

N=111, Back to Normal Barometer - April 22, 2020
MORE THAN ONE ASSURANCE IS VITAL

Which of these singular occurrences (alone or in conjunction with something else) would make you comfortable to visit a theme park, without hesitation?

- This ALONE would be sufficient assurance for me
- I would need this occurrence/condition PLUS at least one other item on this list

<table>
<thead>
<tr>
<th>Assurance</th>
<th>Response Distribution</th>
</tr>
</thead>
<tbody>
<tr>
<td>Approval of a COVID-19 vaccine</td>
<td>44%</td>
</tr>
<tr>
<td>Approval of a pharmaceutical protocol</td>
<td>50%</td>
</tr>
<tr>
<td>Assurance from a friend or family</td>
<td>45%</td>
</tr>
<tr>
<td>Assurance from a reputed national</td>
<td>50%</td>
</tr>
<tr>
<td>Assurance from the theme park</td>
<td>51%</td>
</tr>
<tr>
<td>Assurance from the U.S. Government</td>
<td>42%</td>
</tr>
<tr>
<td>Assurance that customer-facing</td>
<td>52%</td>
</tr>
</tbody>
</table>

N=111, Back to Normal Barometer - April 22, 2020
SOME ASSURANCES ARE MEANINGLESS

Which of these singular occurrences (alone or in conjunction with something else) would make you comfortable to visit a theme park, without hesitation?

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

<table>
<thead>
<tr>
<th>Assurance</th>
<th>0%</th>
<th>25%</th>
<th>50%</th>
<th>75%</th>
<th>100%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Approval of a COVID-19 vaccine</td>
<td>37%</td>
<td>25%</td>
<td>50%</td>
<td>45%</td>
<td>44%</td>
</tr>
<tr>
<td>Approval of a pharmaceutical protocol to mitigate the effects of COVID-19</td>
<td>19%</td>
<td>25%</td>
<td>50%</td>
<td>7%</td>
<td>0%</td>
</tr>
<tr>
<td>Assurance from a friend or family member who has just completed this activity</td>
<td>23%</td>
<td>28%</td>
<td>50%</td>
<td>48%</td>
<td>0%</td>
</tr>
<tr>
<td>Assurance from a reputed national medical authority that it is safe to do so</td>
<td>10%</td>
<td>40%</td>
<td>51%</td>
<td>23%</td>
<td>0%</td>
</tr>
<tr>
<td>Assurance from the theme park that it is safe to do so</td>
<td>23%</td>
<td>34%</td>
<td>42%</td>
<td>51%</td>
<td>0%</td>
</tr>
<tr>
<td>Assurance from the U.S. Government that it is safe to do so</td>
<td>14%</td>
<td>34%</td>
<td>52%</td>
<td>0%</td>
<td>0%</td>
</tr>
<tr>
<td>Assurance that customer-facing employees are required to be tested for COVID-19</td>
<td>19%</td>
<td>25%</td>
<td>50%</td>
<td>45%</td>
<td>44%</td>
</tr>
</tbody>
</table>
DEEP DIVE: WHO’S ASSURED BY A VACCINE?

• Highest-scoring stand-alone assurance: Vaccine at 37%

• Over-indexes for:
  ▪ Male
  ▪ Very conservative
  ▪ Northeast Census Region
WITH ASSURANCES, 59% 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: 12%
- Within one month: 15%
- Within two months: 13%
- Within three months: 19%
- Within 3-6 months: 14%
- Within six months to a year: 16%
- More than a year out: 11%

N=180, Back to Normal Barometer - April 22, 2020
PUTTING A FINE POINT ON ASSURANCES

*Non-medical assurances include assurances from either the U.S. Government, companies, multiple media outlets or a reputed medical authority.

<table>
<thead>
<tr>
<th>Activity</th>
<th>Wave 1</th>
<th>Wave 2</th>
<th>Change in “ready to go”</th>
</tr>
</thead>
<tbody>
<tr>
<td>Take a cruise vacation</td>
<td>39%</td>
<td>53%</td>
<td>+14</td>
</tr>
<tr>
<td>Visit a theme park</td>
<td>33%</td>
<td>39%</td>
<td>+6</td>
</tr>
<tr>
<td>Attend a live sporting event</td>
<td>34%</td>
<td>37%</td>
<td>+3</td>
</tr>
<tr>
<td>See a movie in a theater</td>
<td>32%</td>
<td>35%</td>
<td>+3</td>
</tr>
<tr>
<td>Visit a casino</td>
<td>34%</td>
<td>37%</td>
<td>+3</td>
</tr>
<tr>
<td>Take a commercial flight</td>
<td>32%</td>
<td>34%</td>
<td>+2</td>
</tr>
<tr>
<td>Stay at a hotel or resort</td>
<td>39%</td>
<td>33%</td>
<td>-6</td>
</tr>
</tbody>
</table>

*Non-medical assurances include assurances from either the U.S. Government, companies, multiple media outlets or a reputed medical authority.
BEYOND THESE ASSURANCES, HERE’S WHAT THEY NEED TO SEE FROM YOU
HERE’S WHAT THEY NEED TO SEE FROM YOU

Please indicate the impact of each of the following on your willingness to resume visiting public places such as sports venues, airports, hotels, restaurants or casinos.

- The visible presence of medical screenings, like taking one's temperature or being swabbed or tested prior to allowing one to access the venue
- Knowledge that employees have frequent access to COVID-19 testing, should they not feel well
- Knowledge that all employees are regularly tested for COVID-19

*Percentage who said it would have an extremely positive impact.

n=518, Back to Normal Barometer - April 22, 2020
HERE’S WHAT THEY NEED TO SEE FROM YOU

I'd be much more likely to visit a public place or fly on an aircraft that displays a certificate issued by a local government authority indicating that it has adhered to established protocols for sanitization.

*Percentage who strongly agree.

n=518, Back to Normal Barometer - April 22, 2020
HERE’S WHAT CUSTOMERS ARE WILLING TO DO
GET SWABBED/TEMP TAKEN AT HOTELS/CASINOS

Which one of the following best describes how you might react to a requirement for you and all others visiting hotels or casinos be subject to a medical screening including taking one’s temperature and being swabbed/tested for COVID-19?

**Business Travelers**

- I would not attend, 9%
- I would likely seek other options, 16%
- I would participate but with reservation, 18%
- I would participate each time I attended, 40%
- I would need to think further about it, 16%

**Leisure Travelers**

- I would not attend, 17%
- Gladly participate each time I attended, 35%
- I would need to think further about it, 16%
- I would participate but with reservation, 18%

N=102,022, Back to Normal Barometer - April 22, 2020
GET SWABBED/TEMP TAKEN AT RESTAURANTS

Which one of the following best describes how you might react to a requirement for you and all others visiting restaurants be subject to a medical screening including taking one’s temperature and being swabbed/tested for COVID-19?

**Business Travelers**
- I would not attend, 8%
- I would likely seek other options, 20%
- I would need to think further about it, 13%
- I would participate but with reservation, 18%
- Gladly participate each time I attended, 40%

**Leisure Travelers**
- I would not attend, 18%
- I would likely seek other options, 12%
- I would need to think further about it, 14%
- I would participate but with reservation, 22%
- Gladly participate each time I attended, 33%

N=102,202, Back to Normal Barometer - April 22, 2020
HERE’S WHAT THEY’RE WILLING TO DO

I would be willing to install and activate a digital app that allows government health officials to track my interactions with others, to assist in monitoring the exposure of U.S. citizens to those infected with COVID-19.

*Percentage who strongly agree.

n=518, Back to Normal Barometer - April 22, 2020
IMPEDIMENTS TO BUSINESS TRAVEL
1/3 LESS LIKELY TO TRAVEL FOR BUSINESS

I plan to take the same number or more business trips over the next six months as I did last year

- Strongly agree 33%
- Strongly disagree 31%
- Close to Neutral 36%

N=102, Back to Normal Barometer - April 22, 2020
WHY BIZ TRAVELERS WOULD STAY HOME

You indicated that you would be less likely to travel for business over the next several months. Which if any of the following, are reasons why you say this?

- My employer will limit my business travel due to lingering safety or liability concerns (64%)
- I will personally seek to limit my business travel due to lingering safety concerns (61%)
- Virtual meetings will be a reasonable substitute for meeting in person (59%)
- I anticipate less demand from customers, colleagues or business partners for me to be physically present (55%)
- My employer will limit my business travel due to budget cuts (36%)

N=161, Back to Normal Barometer - April 22, 2020
Qualitative findings
10 1-ON-1 INTERVIEWS: 4 BIG TAKEAWAYS
IT’S A MATTER OF MISTRUST

• Screening questions, and requests to stay home if sick, are not reliable preventions: people lie
• Consistent/automated operations are more reliable than depending on employees
  ▪ fumigation vs. wiping down
• Greater concern about other customers’ actions/exposure than employees’
• Not even friends and family assurances are effective
TESTING MUST INSPIRE CONFIDENCE

• Testing/screening is acceptable if privacy and safety are maintained—not too personal or invasive

• Requires a pre-determined, consistent plan of action
  ▪ Who sees the information?
  ▪ What happens to people who are flagged?
  ▪ A back-up or refund policy must be offered
WYSIATI: “WHAT YOU SEE IS ALL THERE IS"

- Customers want more information on what you’re doing
- Demonstrate your commitment to cleaning with evidence throughout the business
  - Hand sanitizer stations
  - Cleaning staff
  - Information available on protocols
  - Certificates/checklists posted
- Reinforce commitment at other key touchpoints
  - Website for making reservations
  - Additional reassurance for employee contact that they don’t see
  - Food handling
  - Air purification
REMEMBER *GOLDILOCKS*

- Too much overt prevention is no fun; too little signals danger
  - Customers want companies to take steps that aren’t overbearing
  - Yet they may question if the business should be open
- Fear/anxiety impedes enjoyment, especially with kids
- People don’t expect returning to normal to be “normal,” and some will make their own changes
- Business travelers may accept more inconveniences than pleasure travelers – they expect them in their workplace
Goldilocks And The Three Bears

JUST RIGHT

• No-contact screening
• Non-personal questions
• Social distance measures
• Enable hygiene measures
• Increased cleaning

TOO LITTLE

• Business as usual (pre-pandemic)

TOO MUCH

• Invasive screening
• Projecting fear

No contact screening
Non-personal questions
Social distance measures
Enable hygiene measures
Increased cleaning
QUESTIONS

• What questions do you have about these findings?

• What questions should we consider for wave 3?

• When would you like us to brief your members?
Ron Bonjean, Partner, ROKK solutions
Rich Thau, President, Engagious
Jon Last, President, SLRG
Gina Derickson, Research Director, Engagious