

# WHAT IT WILL TAKE TO GET AMERICANS TO TRAVEL

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

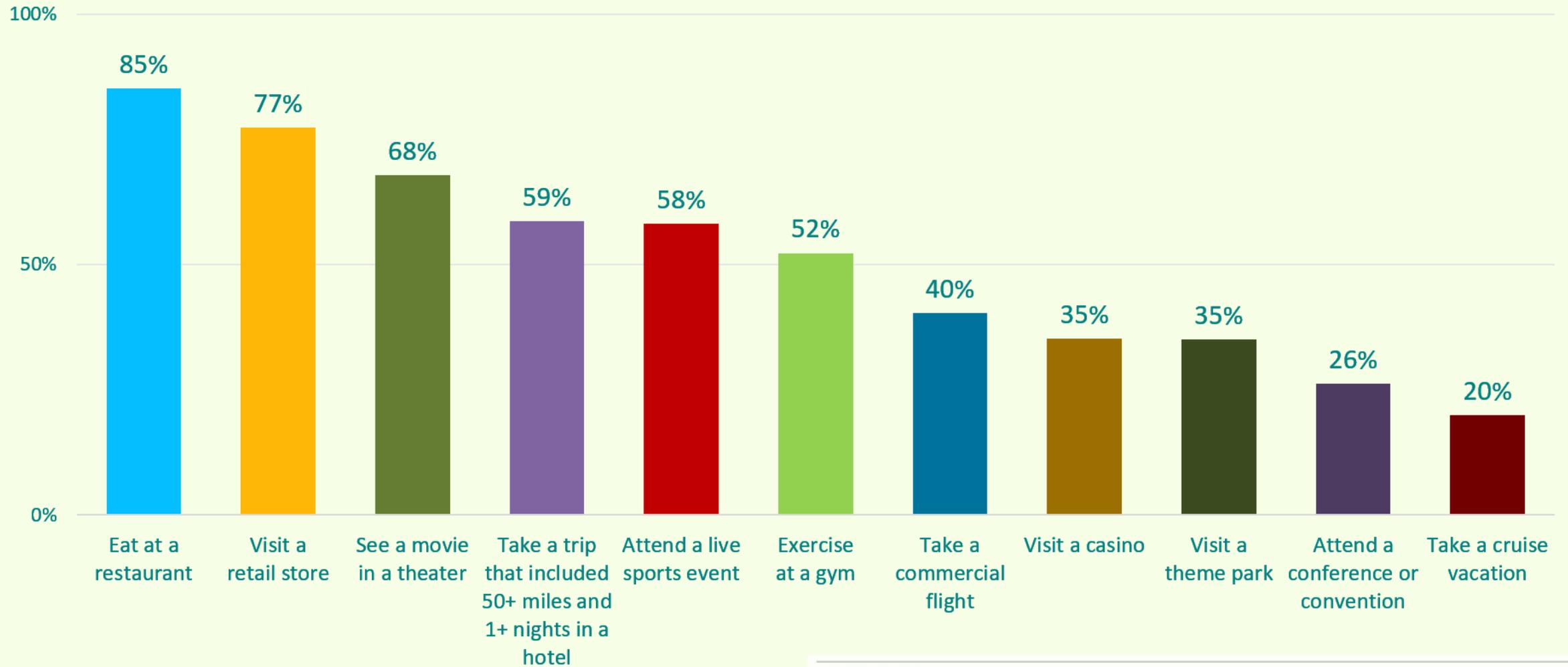
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GINA DERICKSON, RESEARCH DIRECTOR OF ENGAGIOUS

# 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

# CONTEXT: RESPONDENTS ACTIVELY ENGAGE

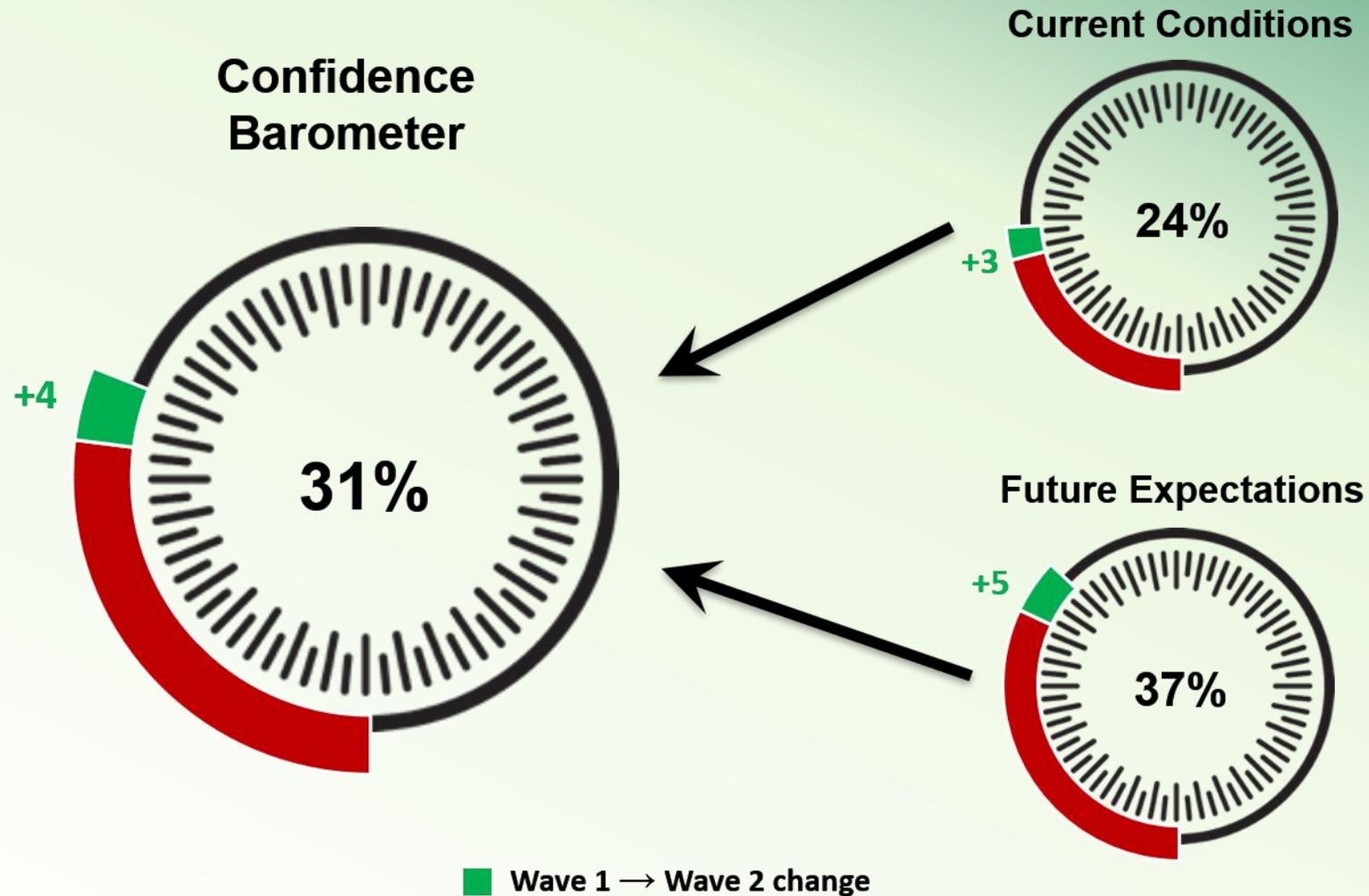
In which of the following leisure activities have you participated over the past 12 months?



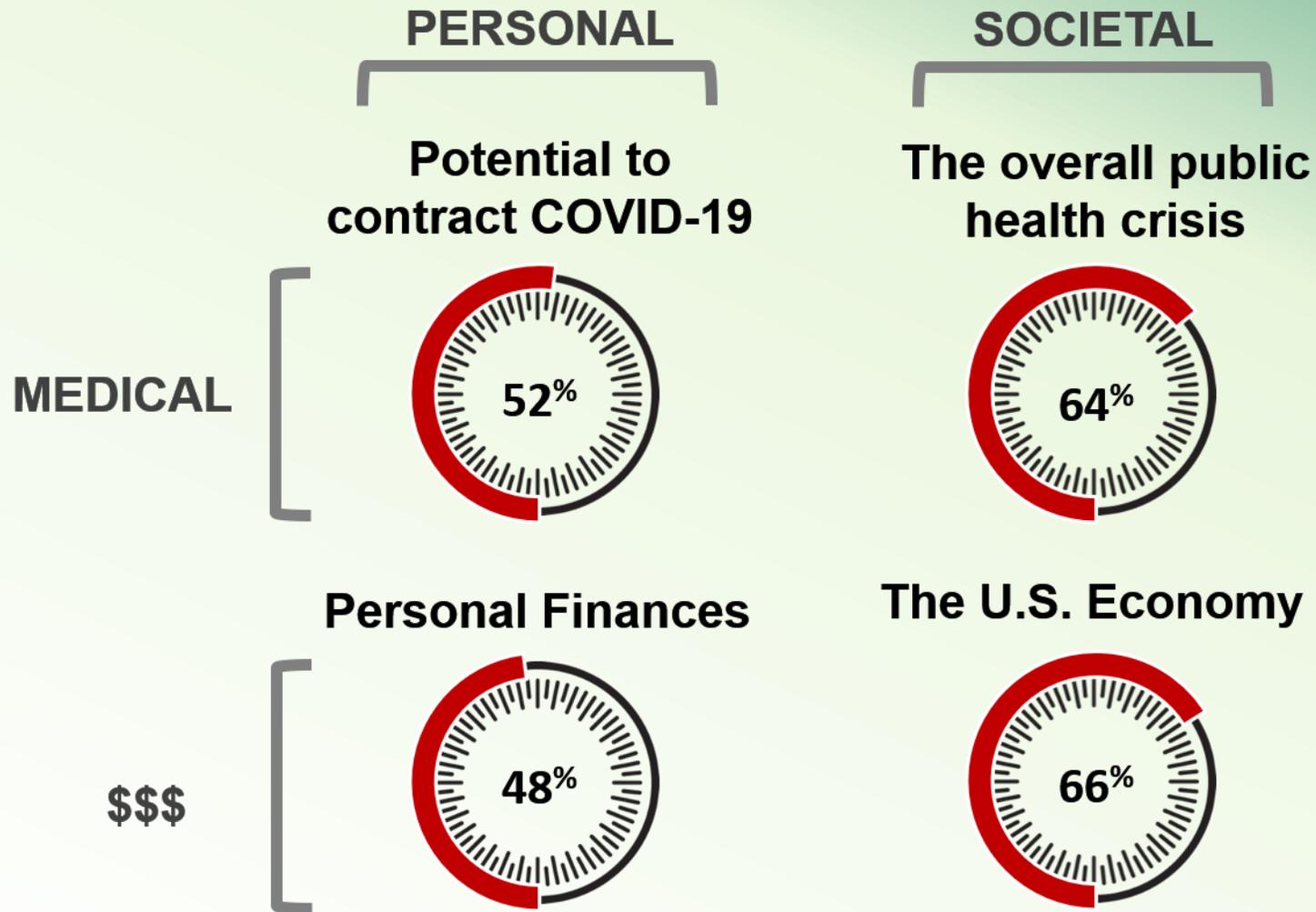
# WHERE WE STAND RIGHT NOW



# SLIGHT UPTICK IN CONFIDENCE



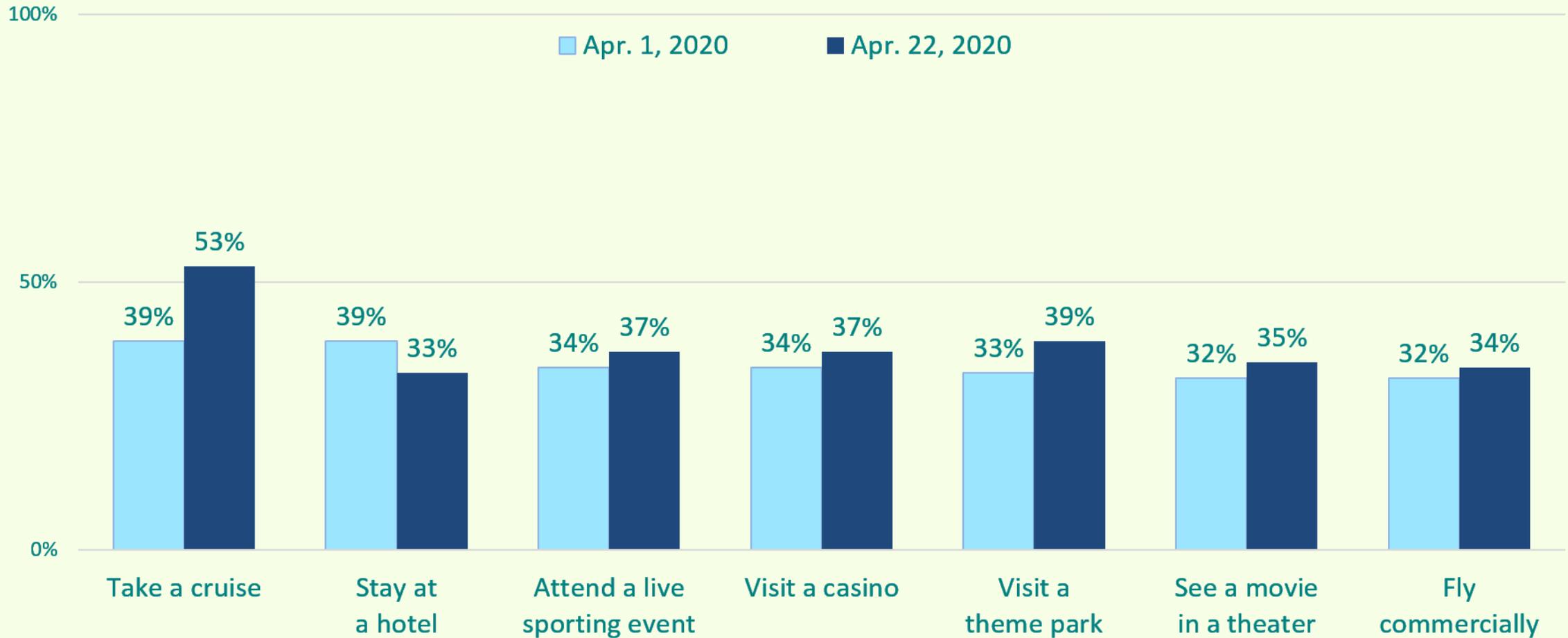
# WHAT ARE CONSUMERS MOST CONCERNED ABOUT?



\*Percentage who said they are extremely concerned  
n=518 Back to Normal Barometer - April 22, 2020

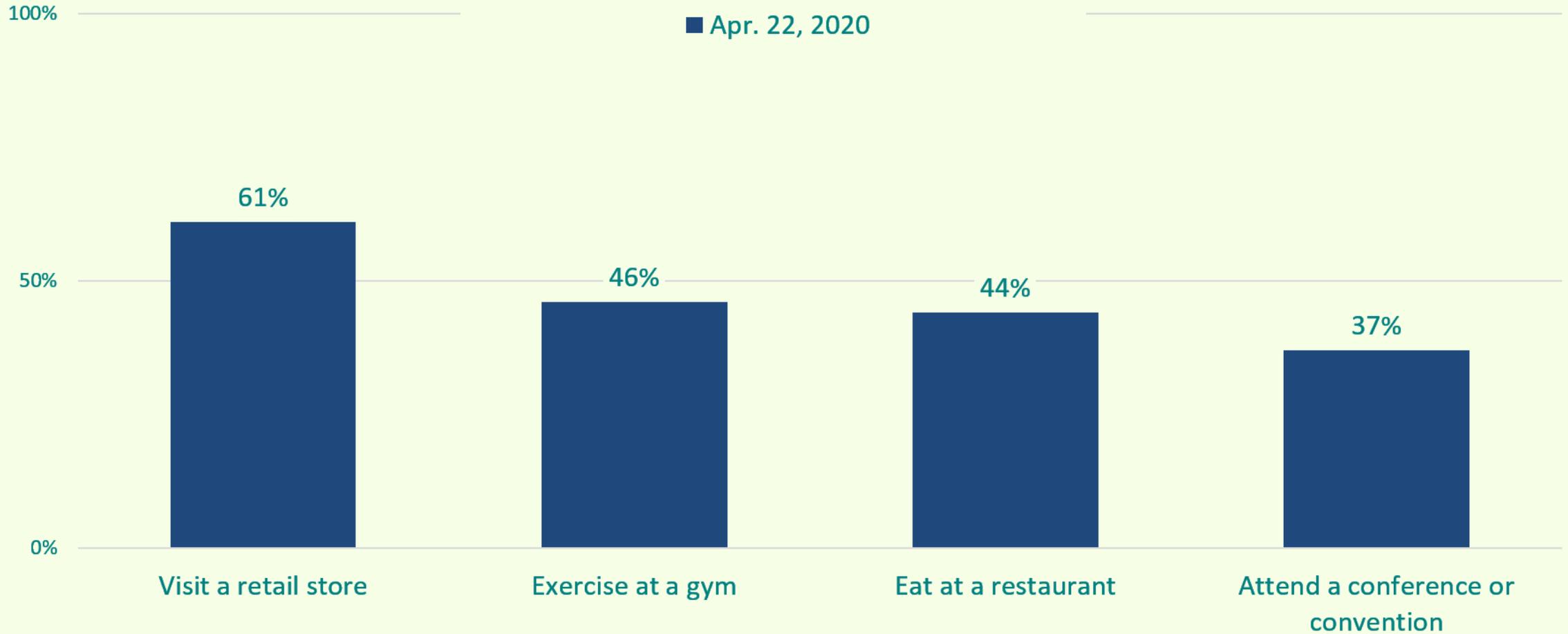
# SLIGHT UPTICK IN “READY TO RETURN NOW”

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

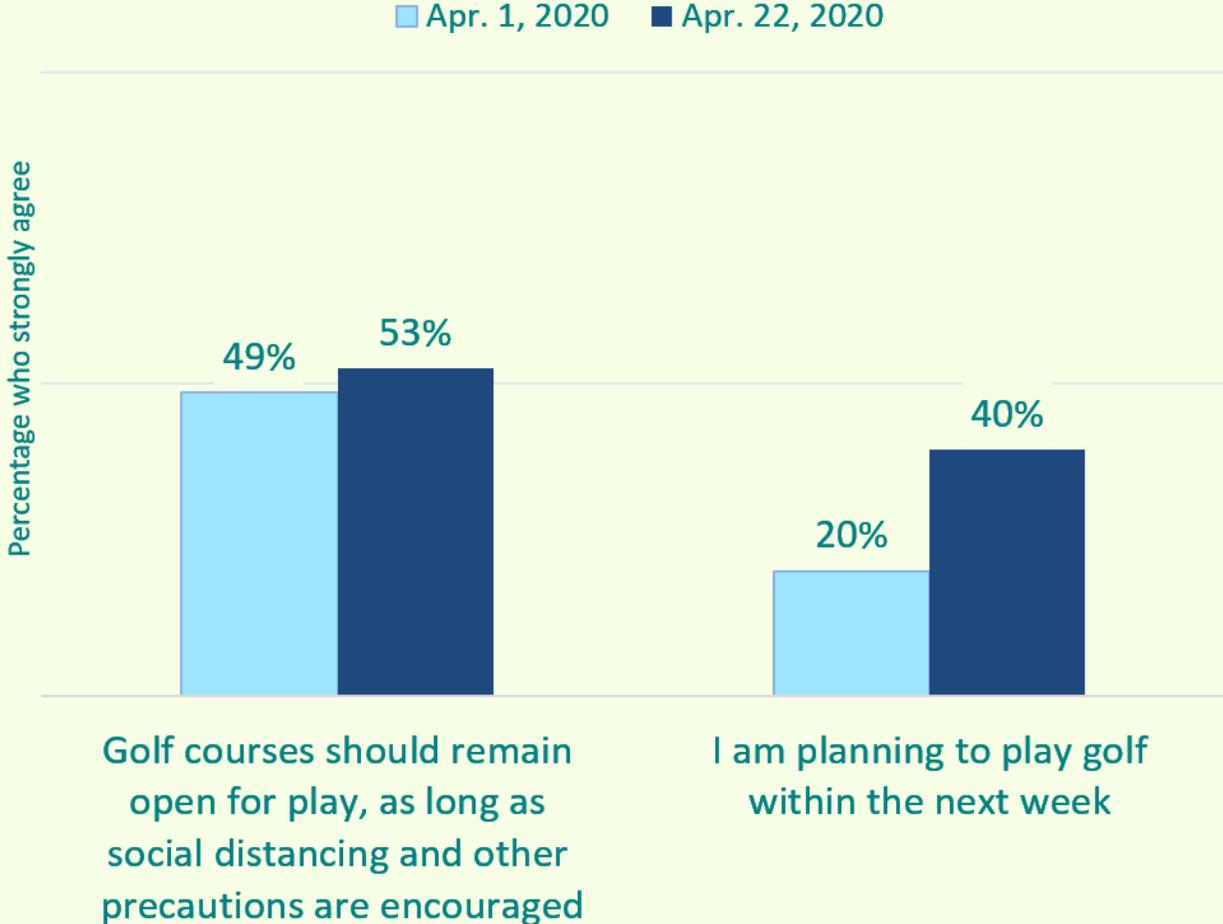
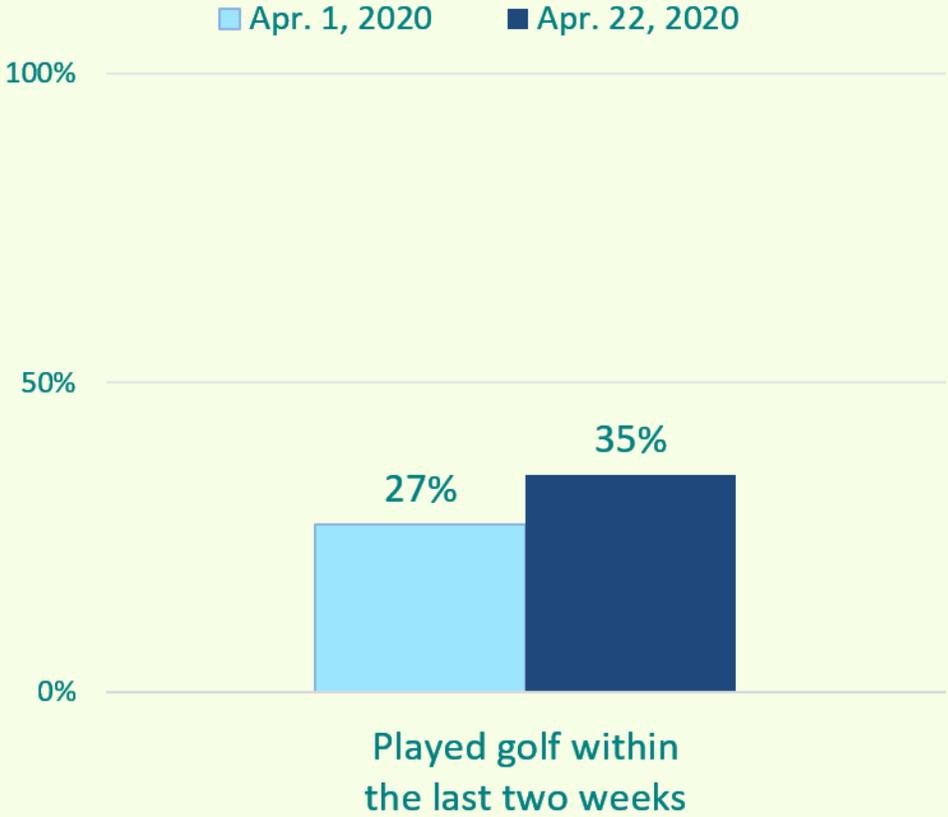


# THERE'S MORE THEY'RE WILLING TO DO

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

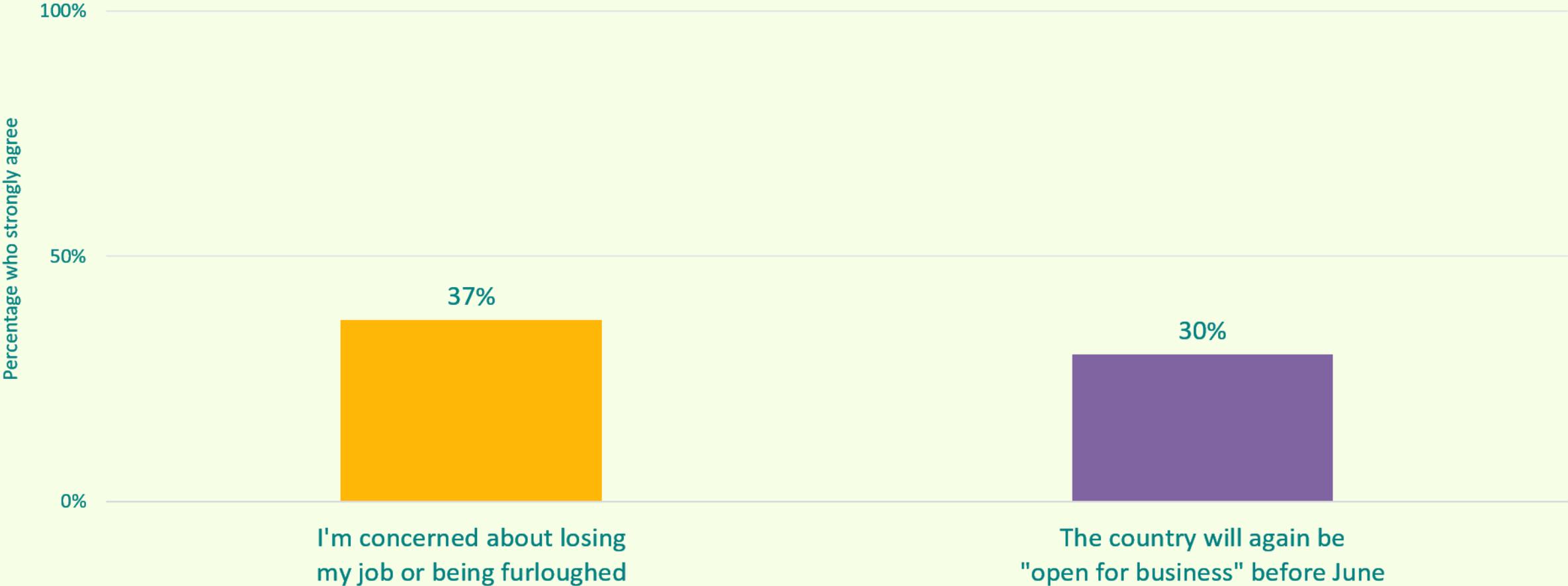


# UPTICK CASE STUDY: GOLF



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



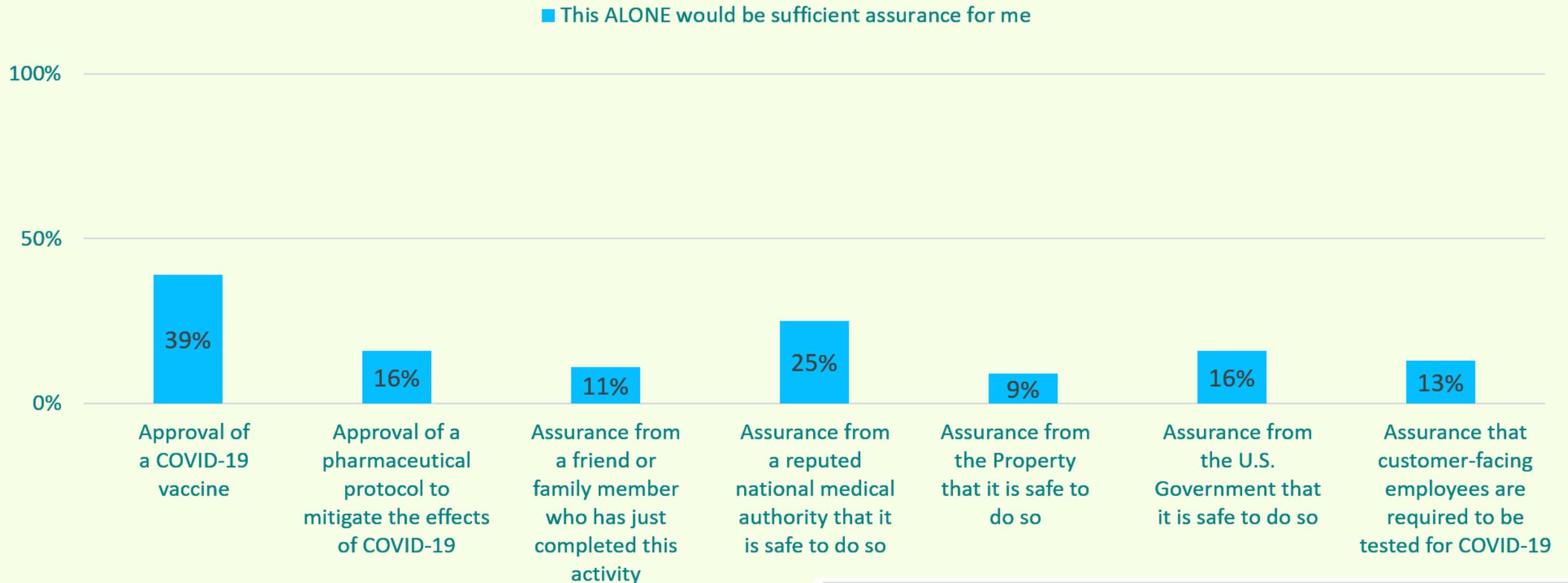
\*Percentage of respondents who say they strongly agree.  
n=518, Back to Normal Barometer - April 22, 2020

# WHICH ASSURANCES WILL RE-ENGAGE?

# Hotels

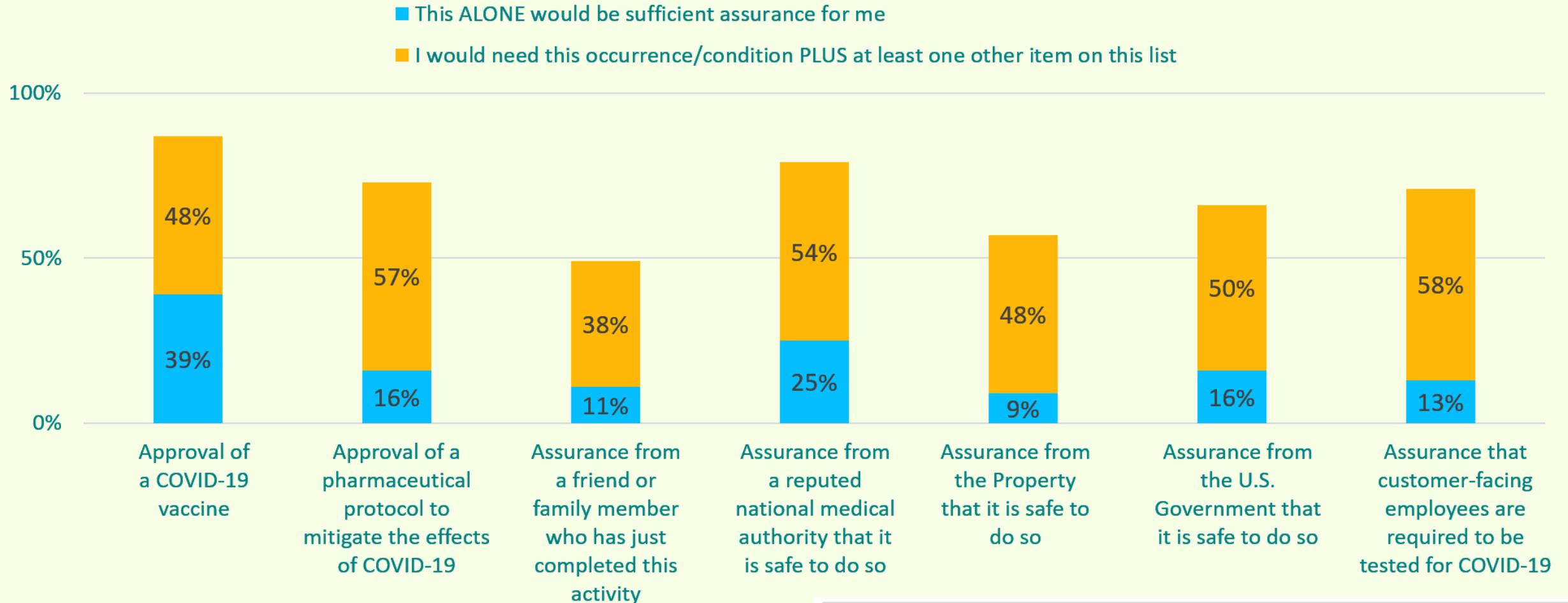
# SOME ASSURANCES REALLY MATTER A LOT

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



# MORE THAN ONE ASSURANCE IS VITAL

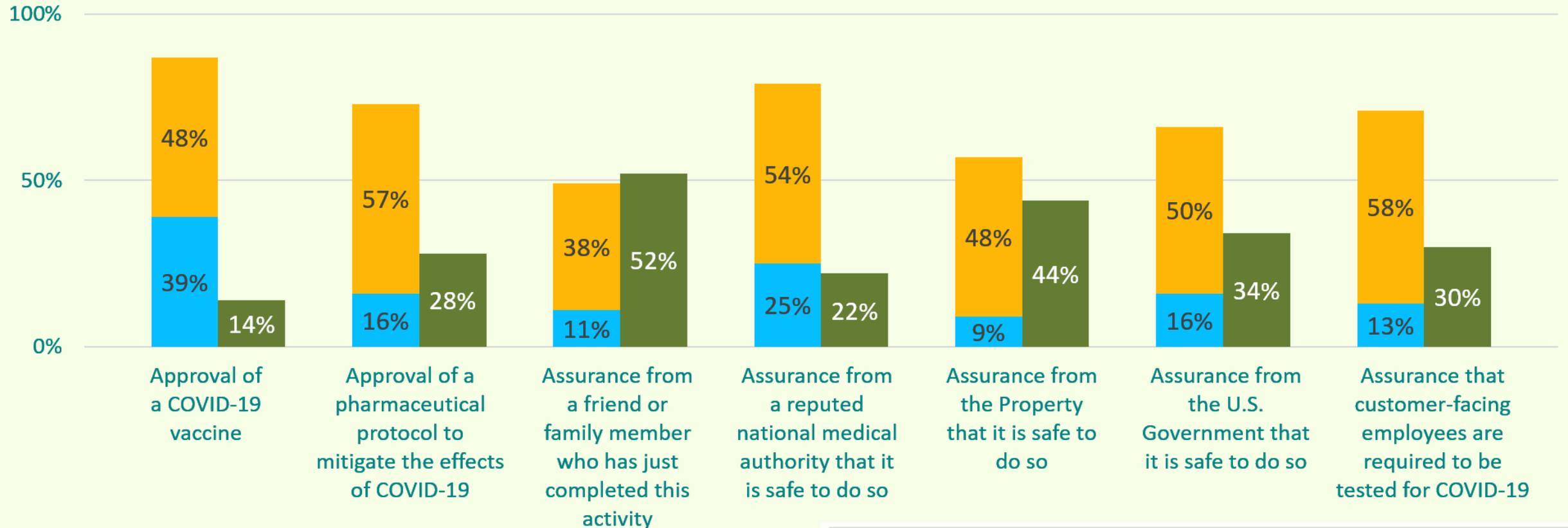
Which of these singular occurrences (alone or in conjunction with something else) would make you would make you comfortable to stay at a hotel or resort, without hesitation?



# SOME ASSURANCES ARE MEANINGLESS

Which of these singular occurrences (alone or in conjunction with something else) would make you would make you comfortable to stay at a hotel or resort, 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

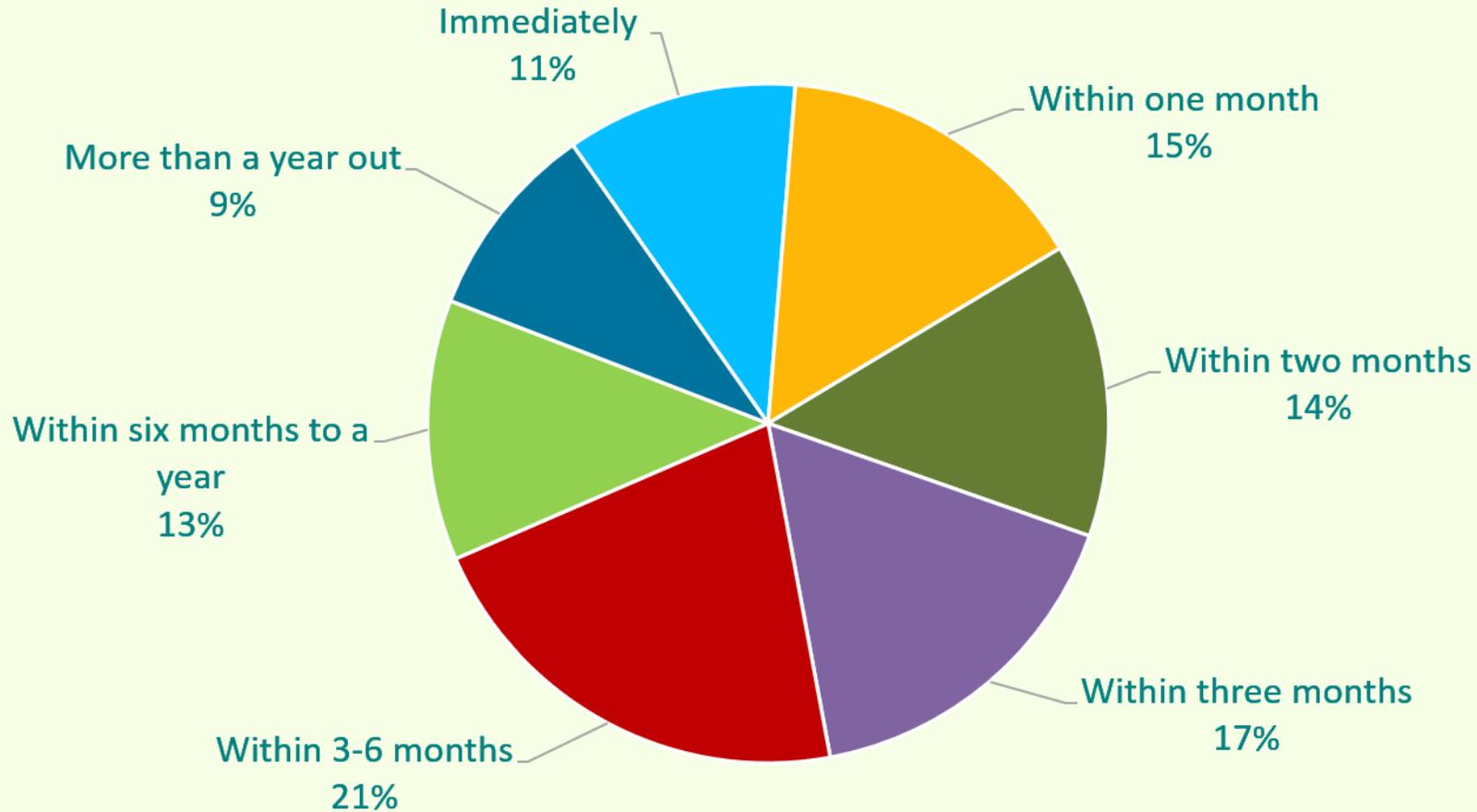


# DEEP DIVE: WHO'S ASSURED BY A VACCINE?

- 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

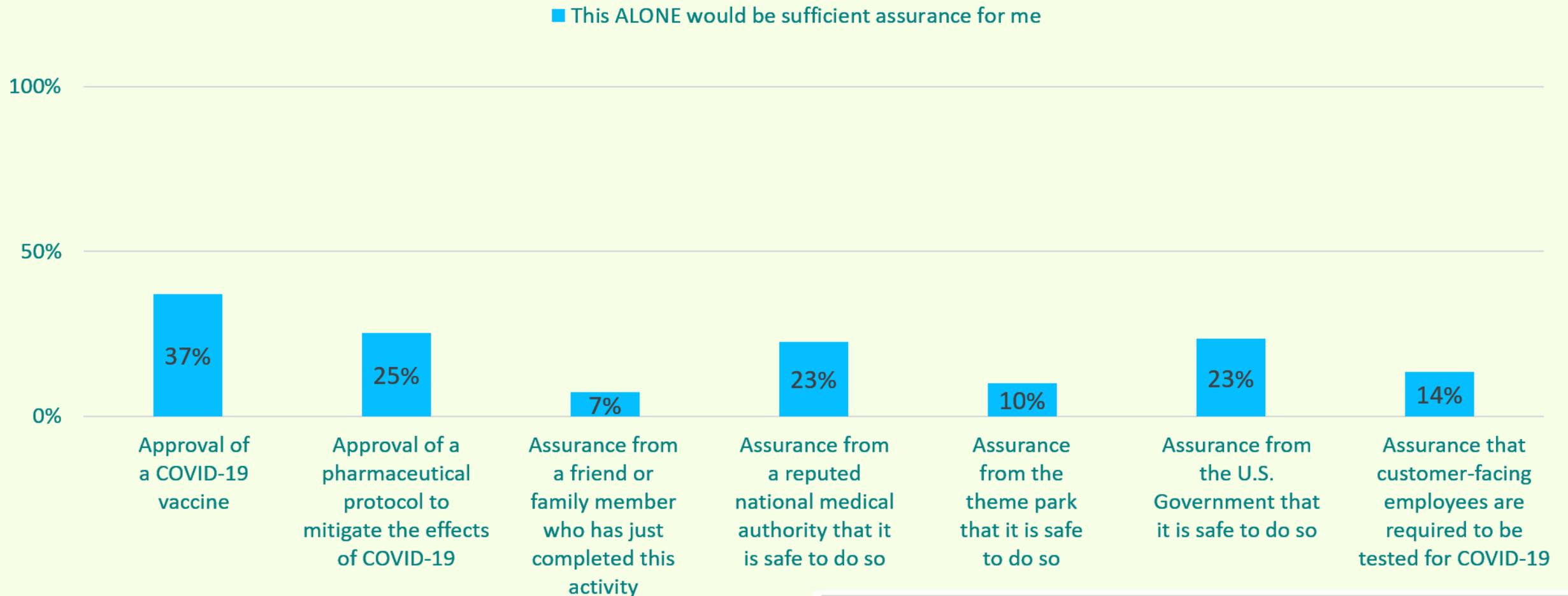
Assuming you had the necessary assurances that it was safe to resume normal activities, how quickly would you next.... Take a trip that included travel of 50 miles or more and 1+ nights in a hotel or other paid lodging?



# Theme Parks

# SOME ASSURANCES REALLY MATTER A LOT

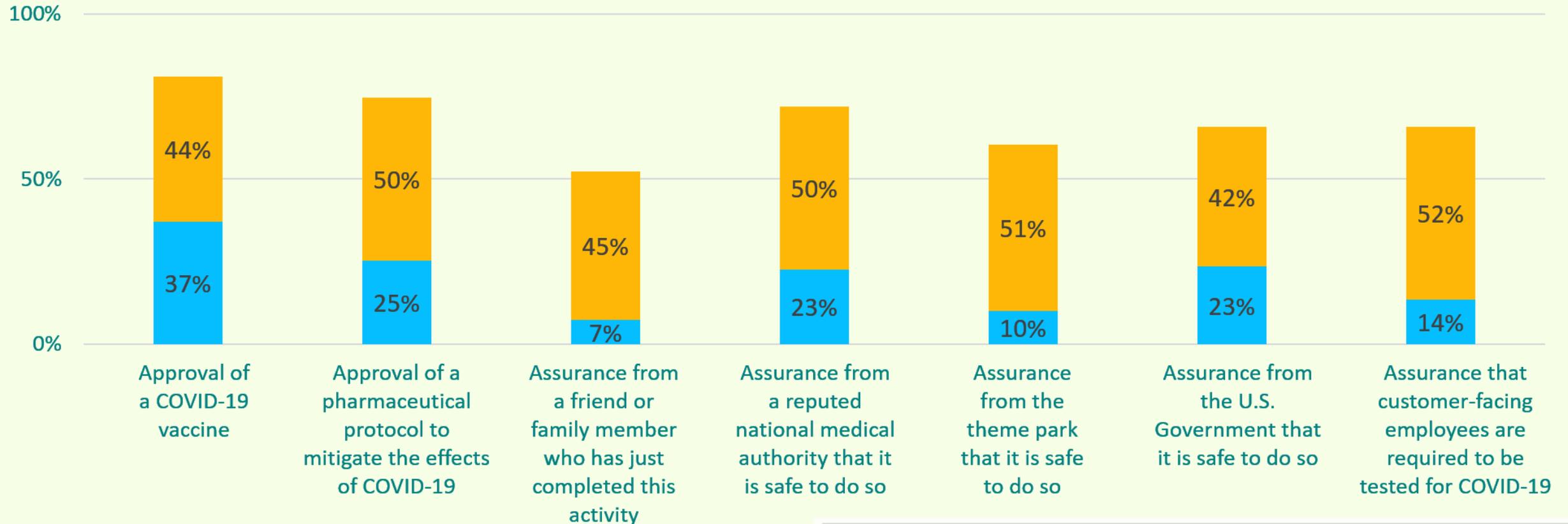
Which of these singular occurrences (alone or in conjunction with something else) would make you comfortable to visit a theme park, without hesitation?



# 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?

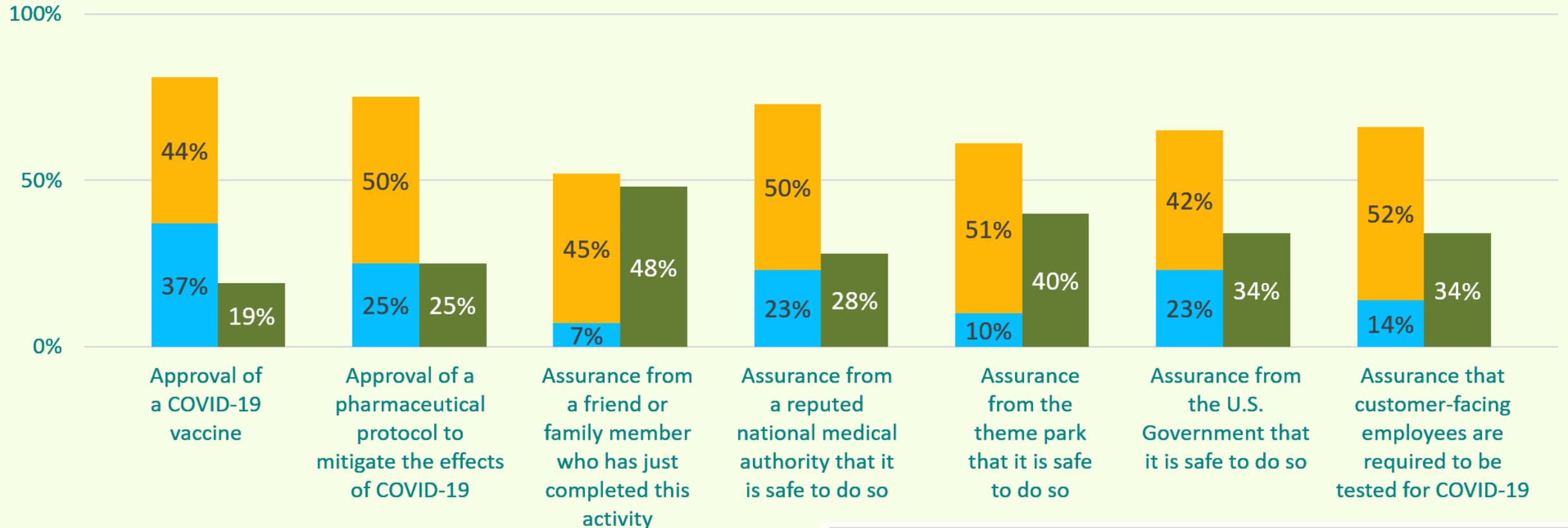
- This ALONE would be sufficient assurance for me
- I would need this occurrence/condition PLUS at least one other item on this list



# SOME ASSURANCES ARE MEANINGLESS

Which of these singular occurrences (alone or in conjunction with something else) would make you 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

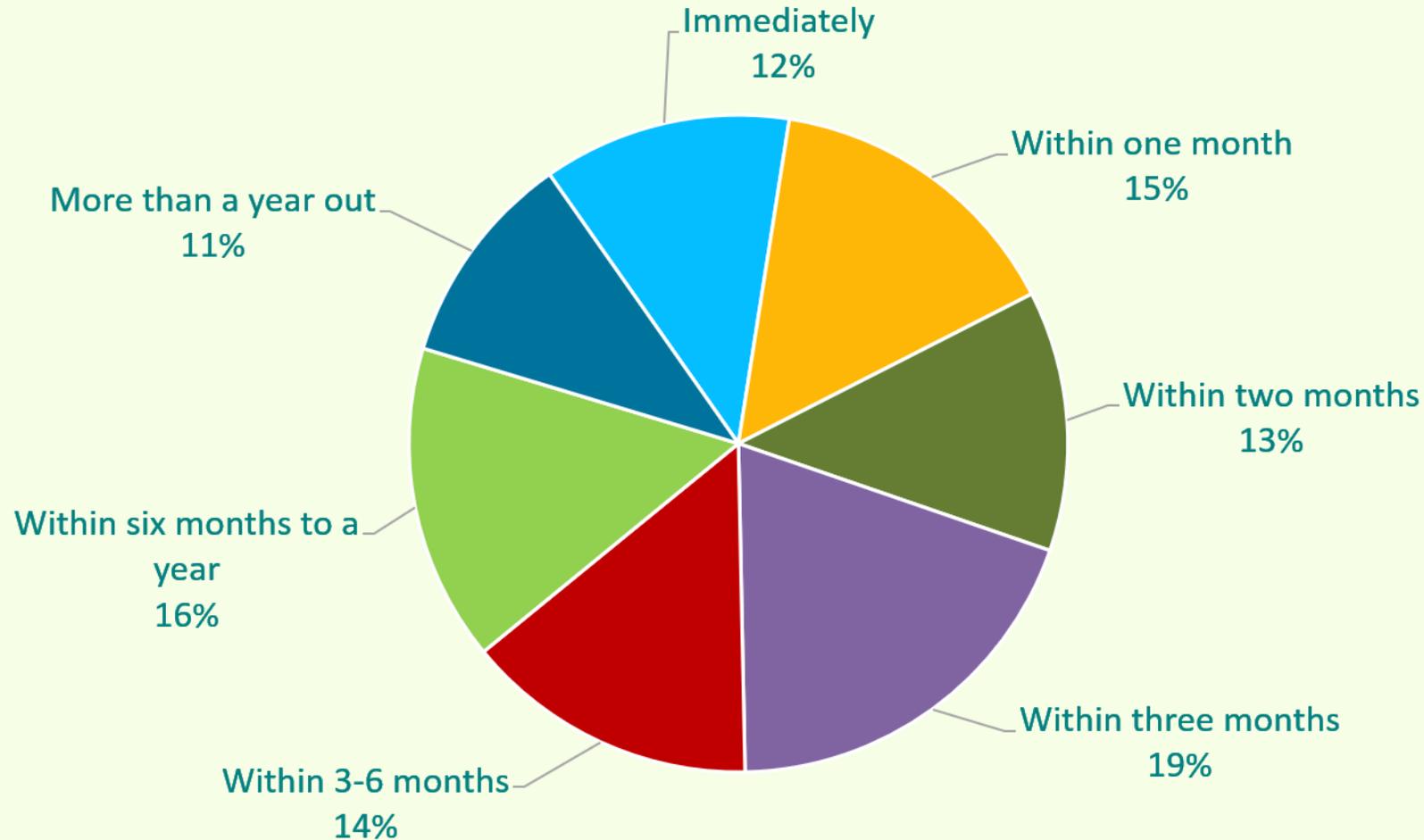


# DEEP DIVE: WHO'S ASSURED BY A VACCINE?

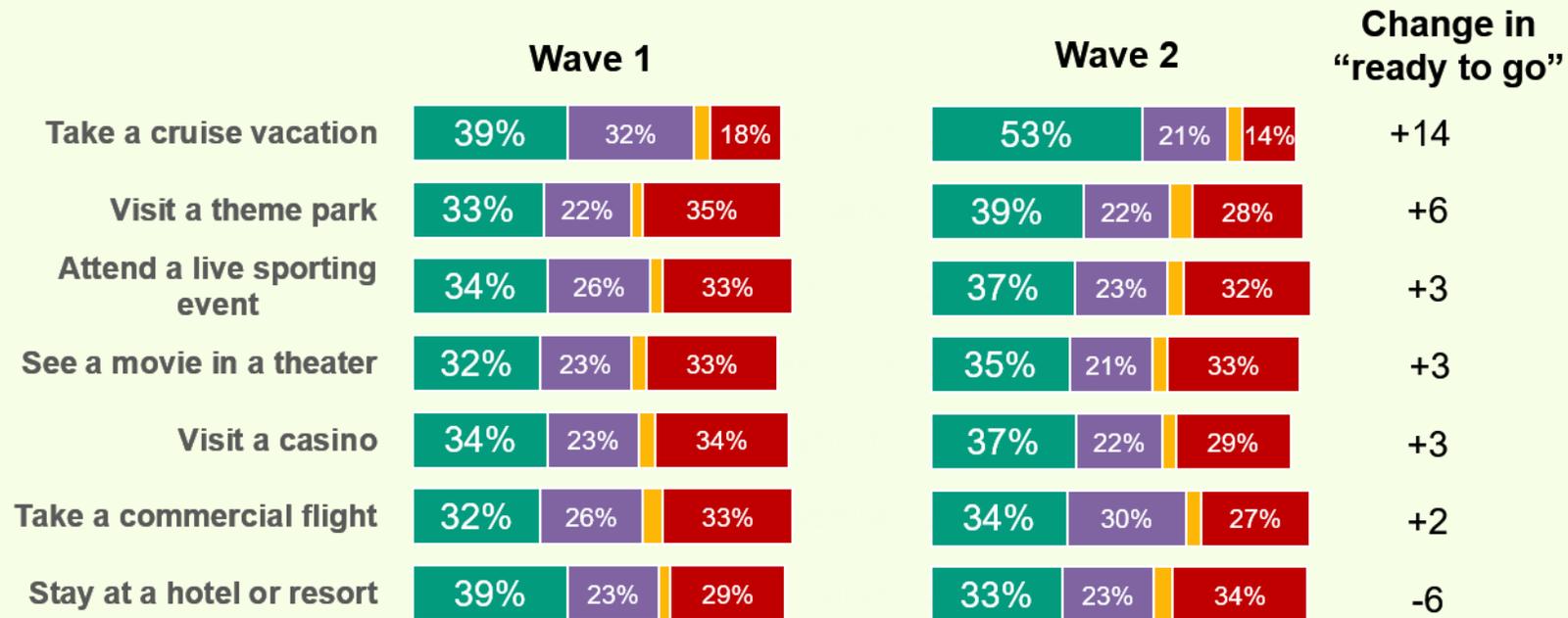
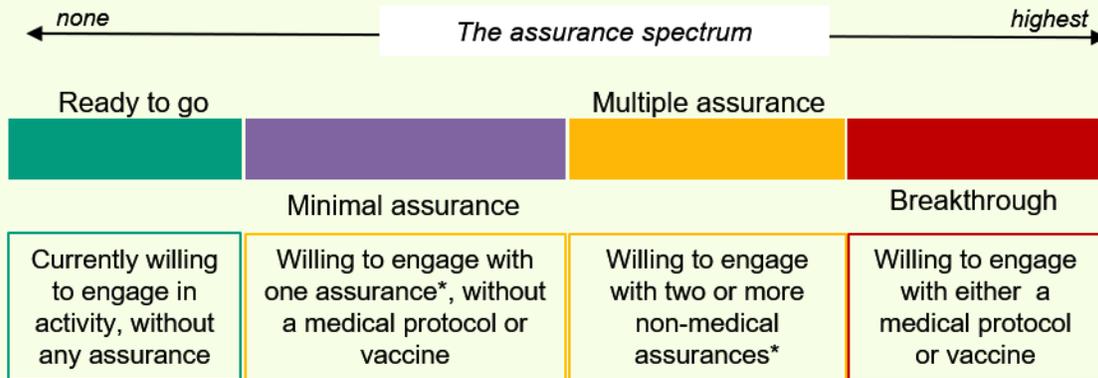
- Highest-scoring stand-alone assurance: Vaccine at 37%
- Over-indexes for:
  - Male
  - Very conservative
  - Northeast Census Region

# 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?



# 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.



**BEYOND THESE ASSURANCES,  
HERE'S WHAT THEY NEED  
TO SEE FROM YOU**

# HERE'S WHAT THEY NEED TO SEE FROM YOU

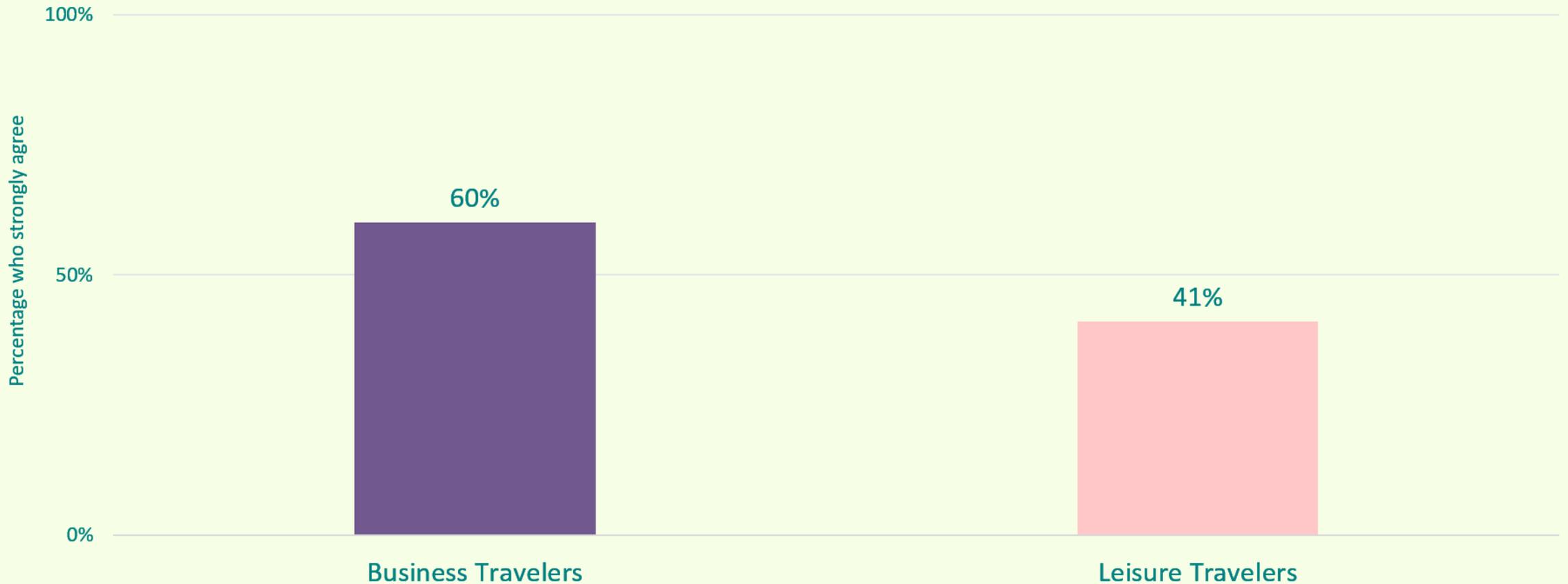
Please indicate the impact of each of the following on your willingness to resume visiting public places such as sports venues, airports, hotels, restaurants or casinos.



\*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



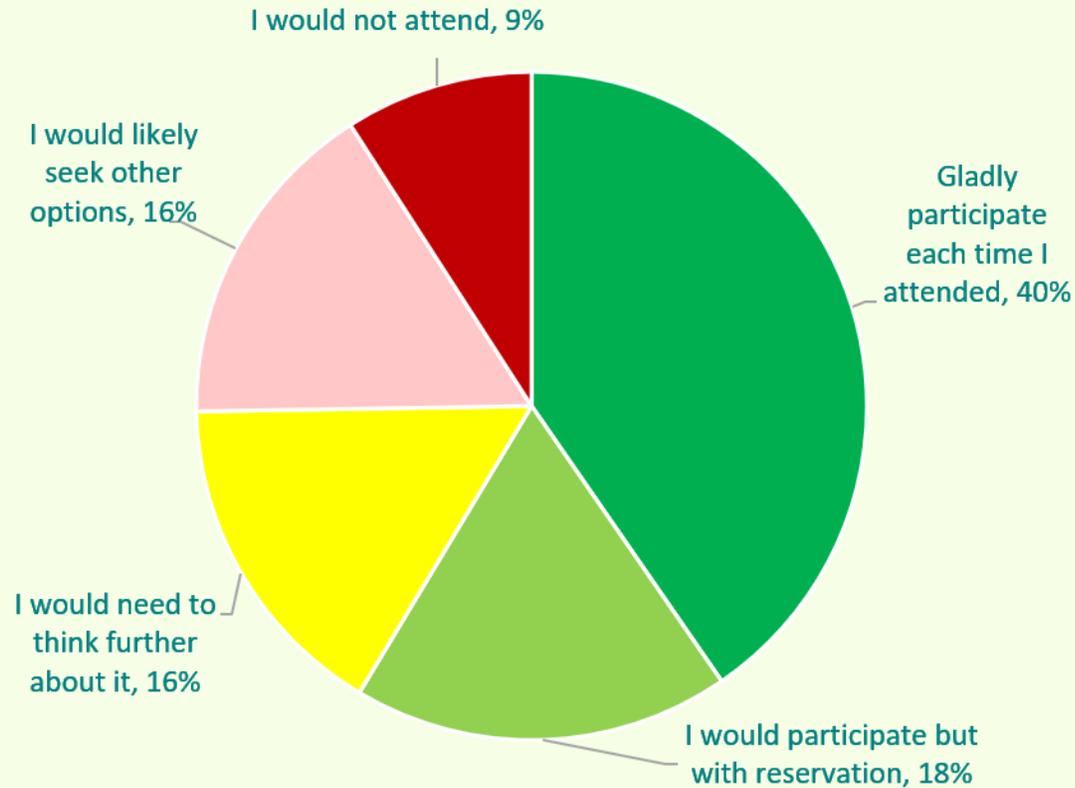
\*Percentage who strongly agree.  
n=518, Back to Normal Barometer - April 22, 2020

# HERE'S WHAT CUSTOMERS ARE WILLING TO DO

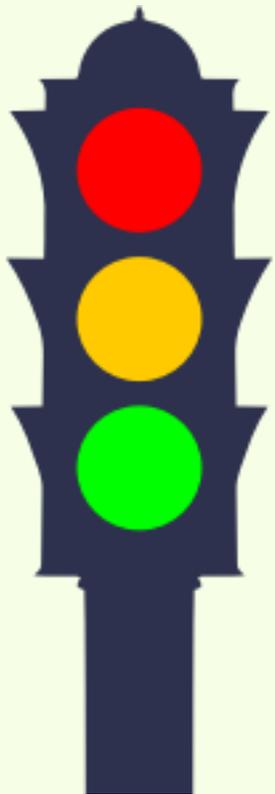
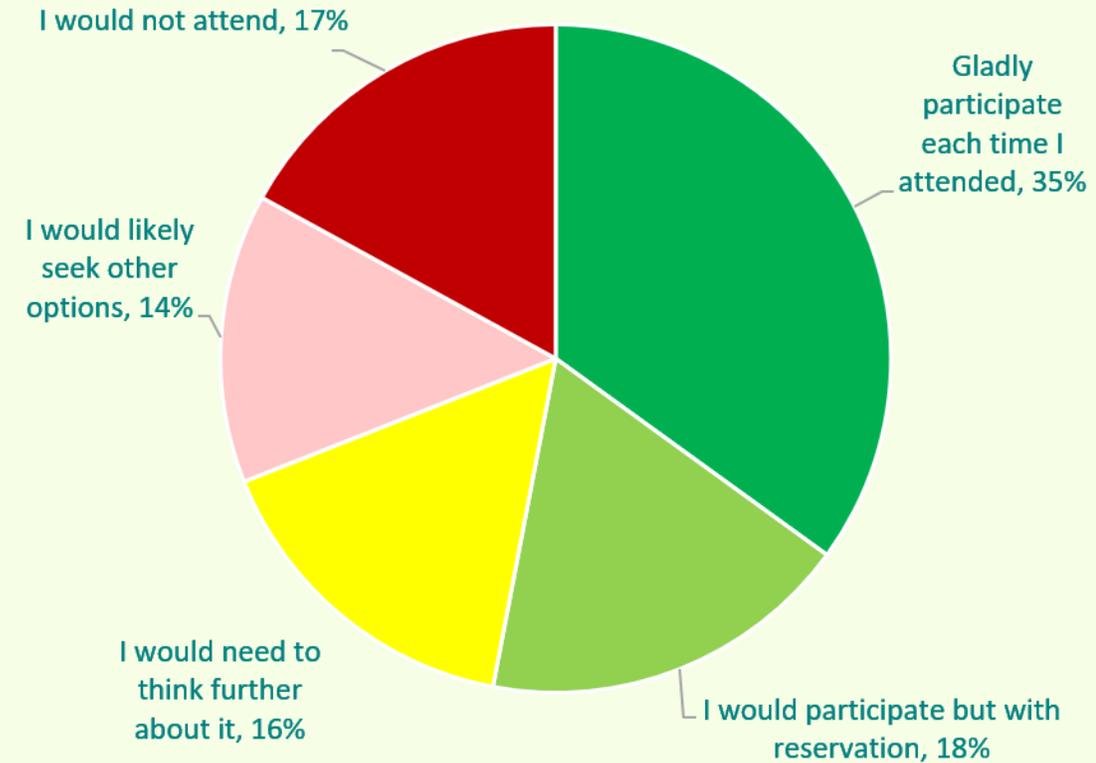
# GET SWABBED/TEMP TAKEN AT HOTELS/CASINOS

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



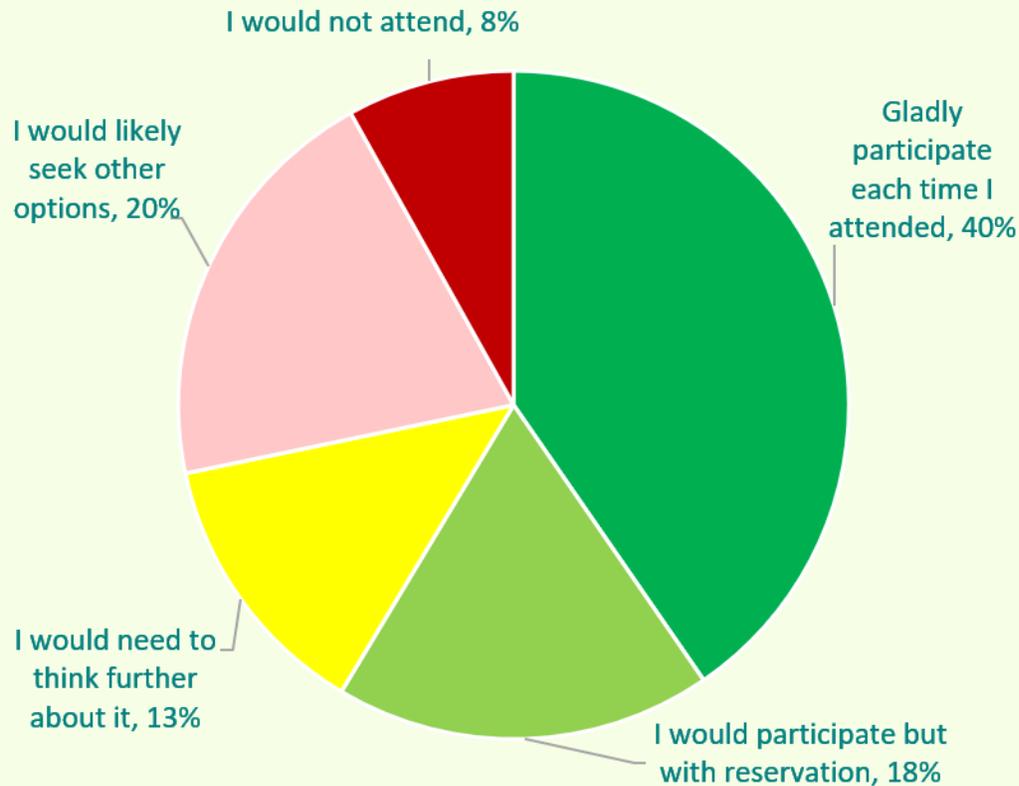
### Leisure Travelers



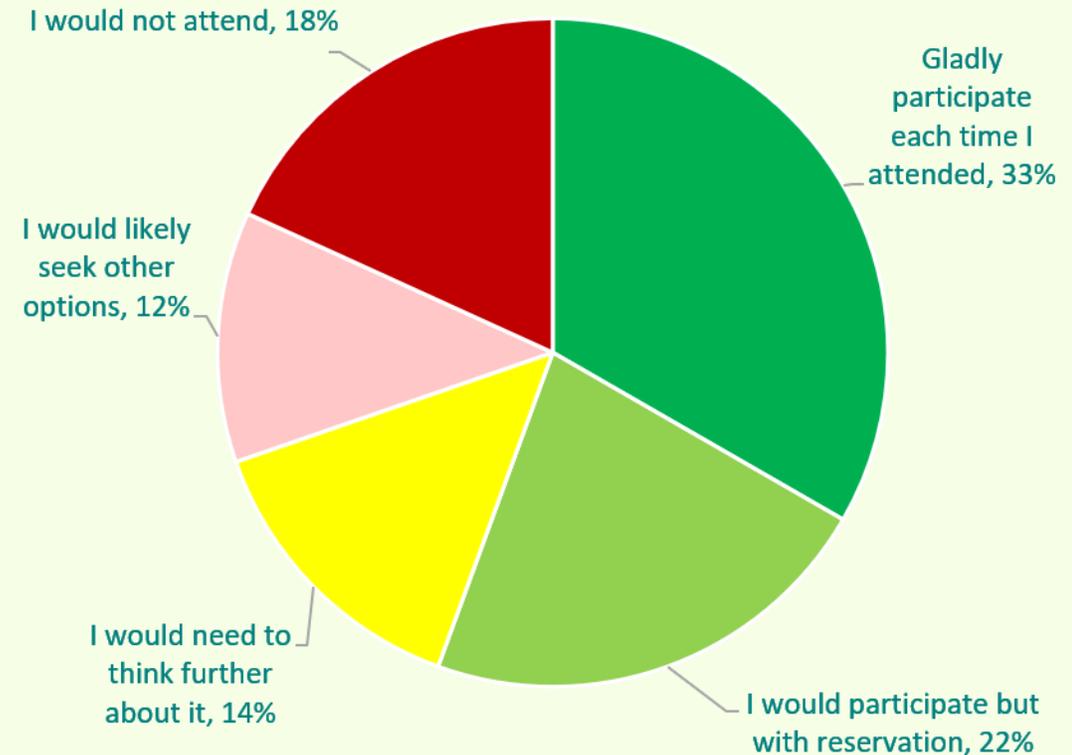
# GET SWABBED/TEMP TAKEN AT RESTAURANTS

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



### Leisure Travelers



# 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

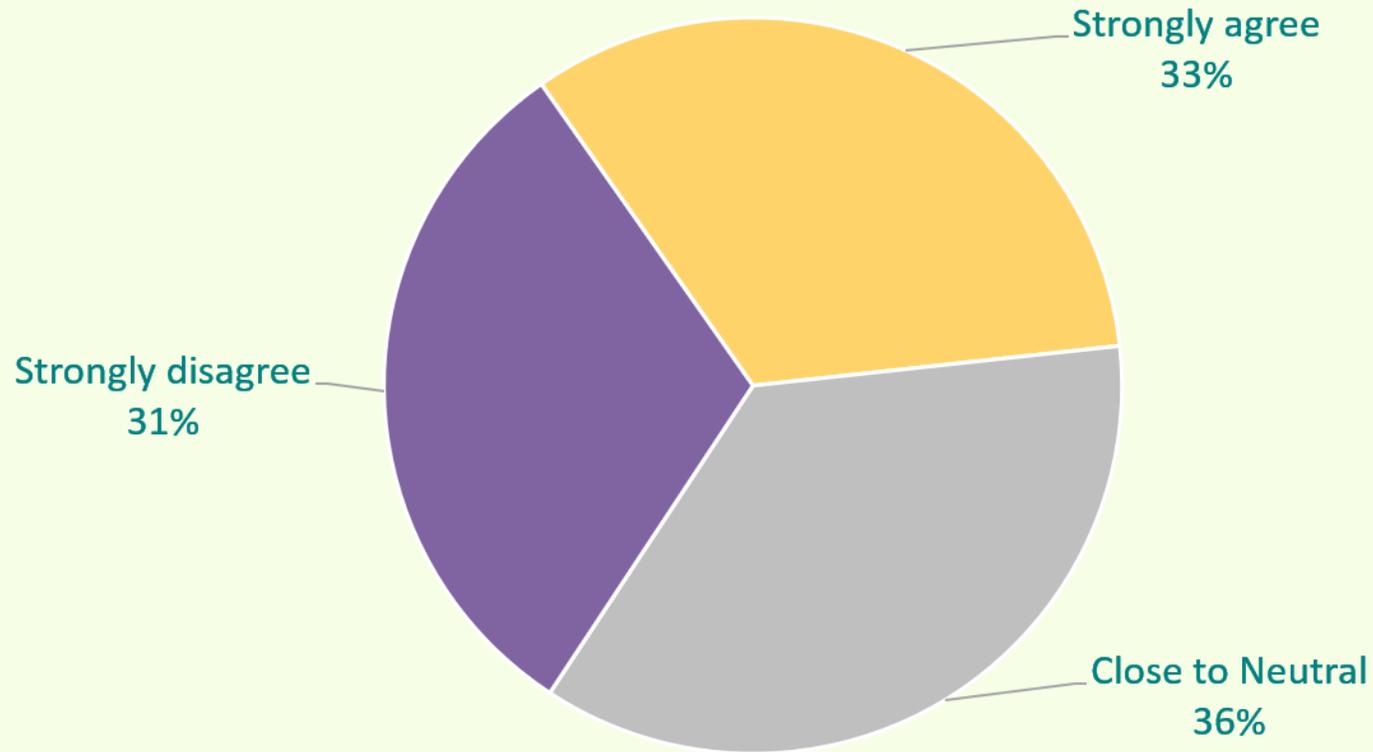


\*Percentage who strongly agree.  
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# IMPEDIMENTS TO BUSINESS TRAVEL

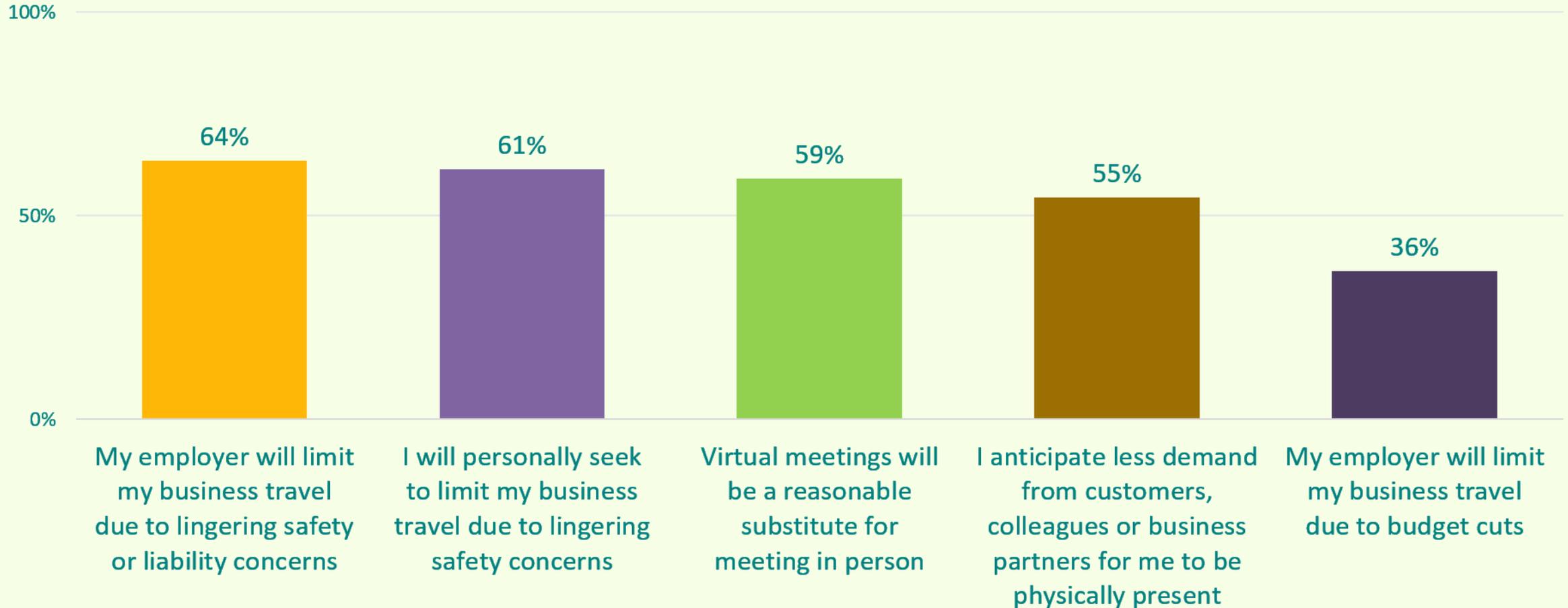
# 1/3 LESS LIKELY TO TRAVEL FOR BUSINESS

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



# 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?



# 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 *GOLDBLOCKS*

- **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



## JUST RIGHT

### TOO LITTLE

- Business as usual (pre-pandemic)

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

### TOO MUCH

- Invasive screening
- Projecting fear

# 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?



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**Gina Derickson, Research Director, Engagious**