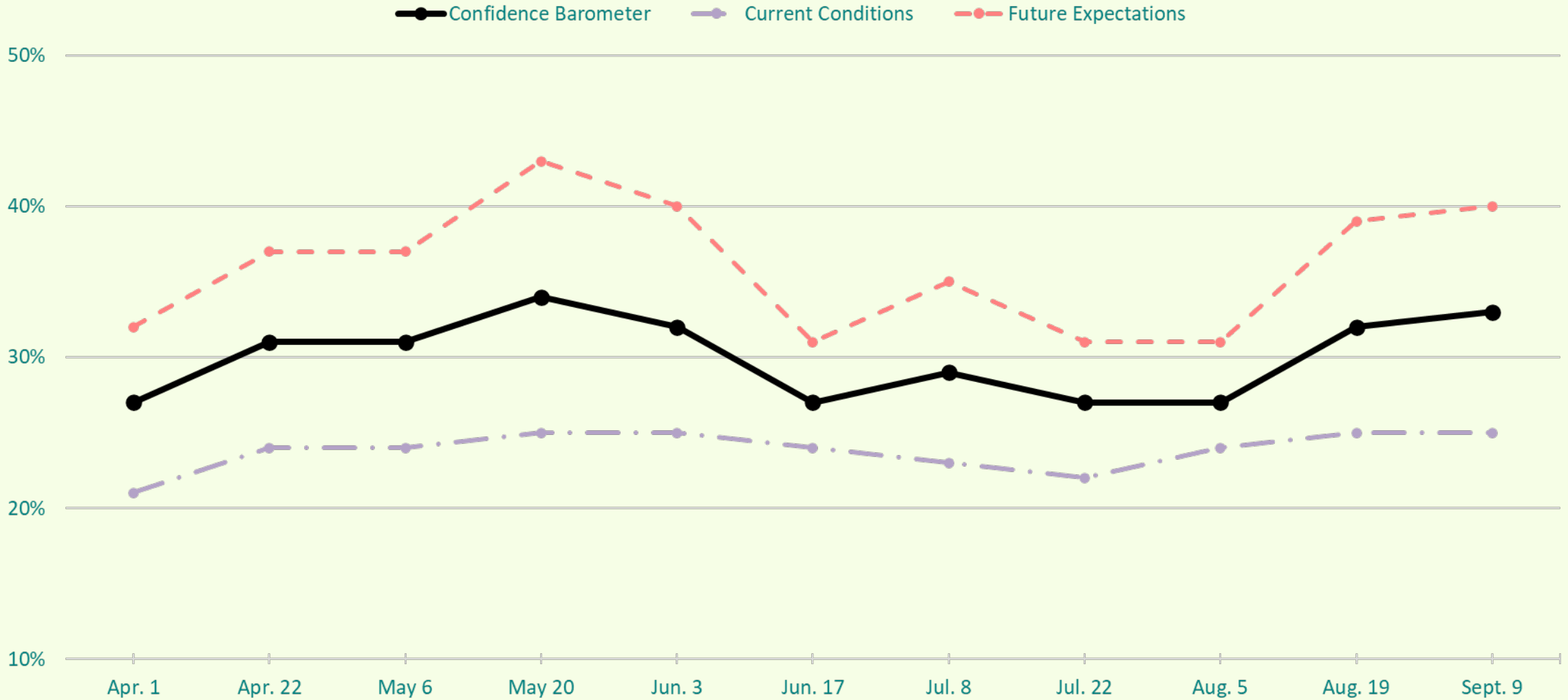


WAVE 11: EMERGING FROM THEIR SHELLS

Public opinion insights from the Sept. 9, 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 AT ENGAGIOUS

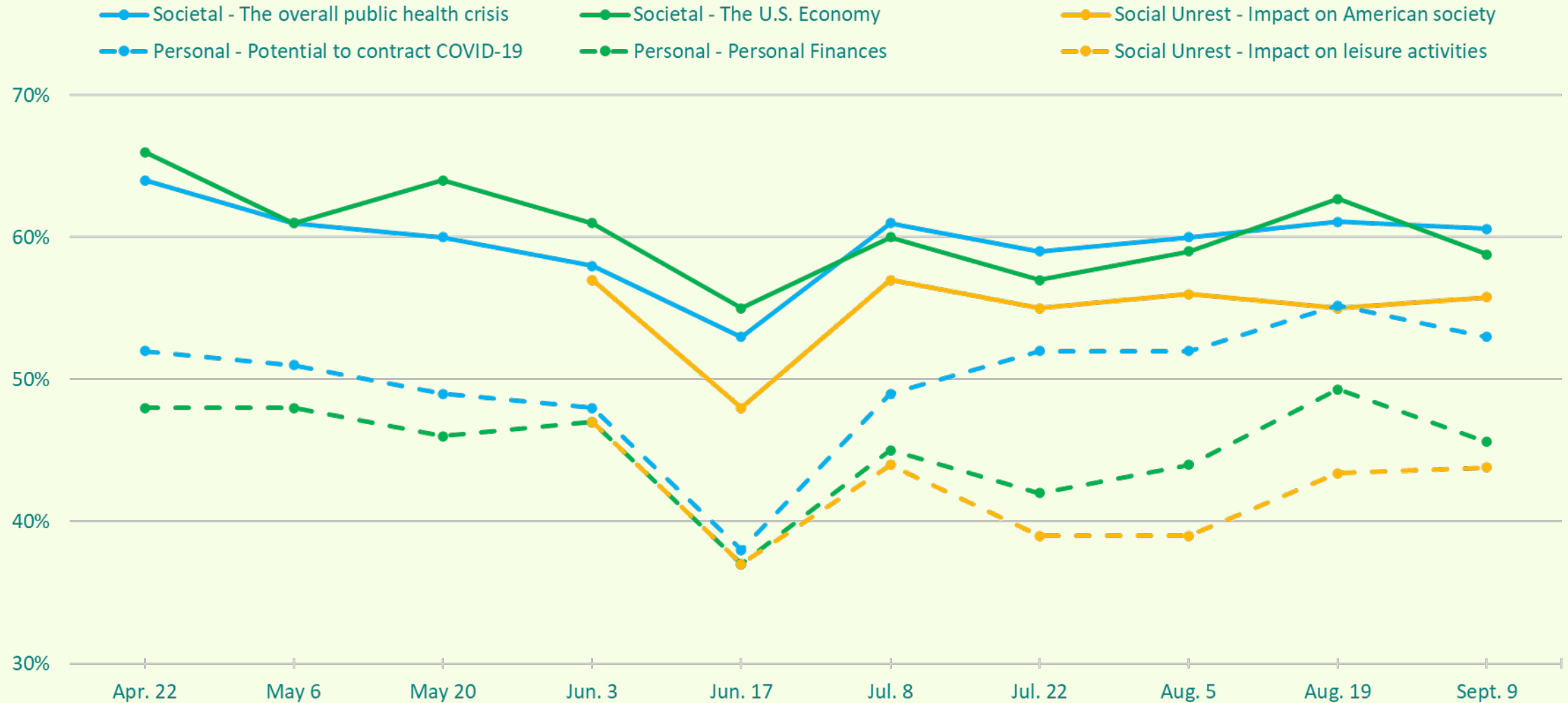
CONFIDENCE BAROMETER SHOWS SLIGHT UPTICK



[Back to Normal Barometer, Sept. 9, 2020](#)



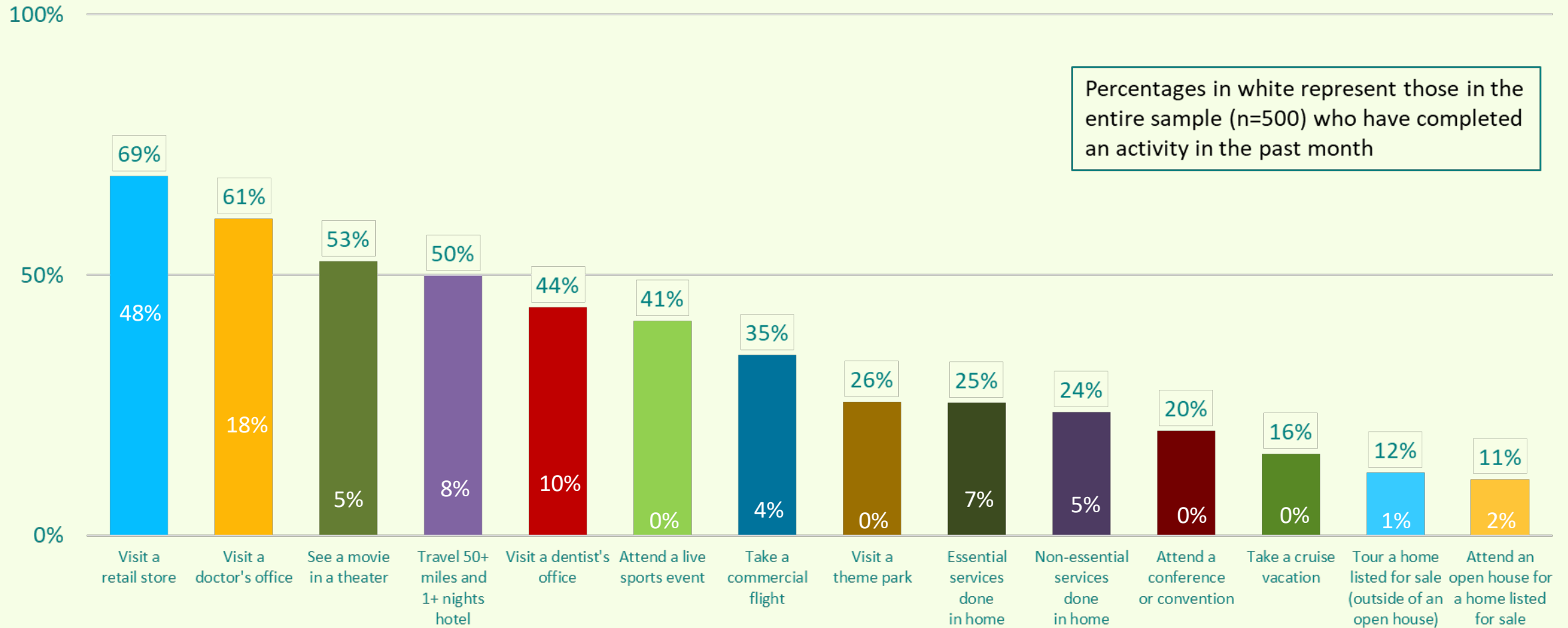
SOCIETAL CONCERNS LEVEL OFF; REMAIN ABOVE PERSONAL



Back to Normal Barometer, Sept. 9, 2020 ; % who are very concerned

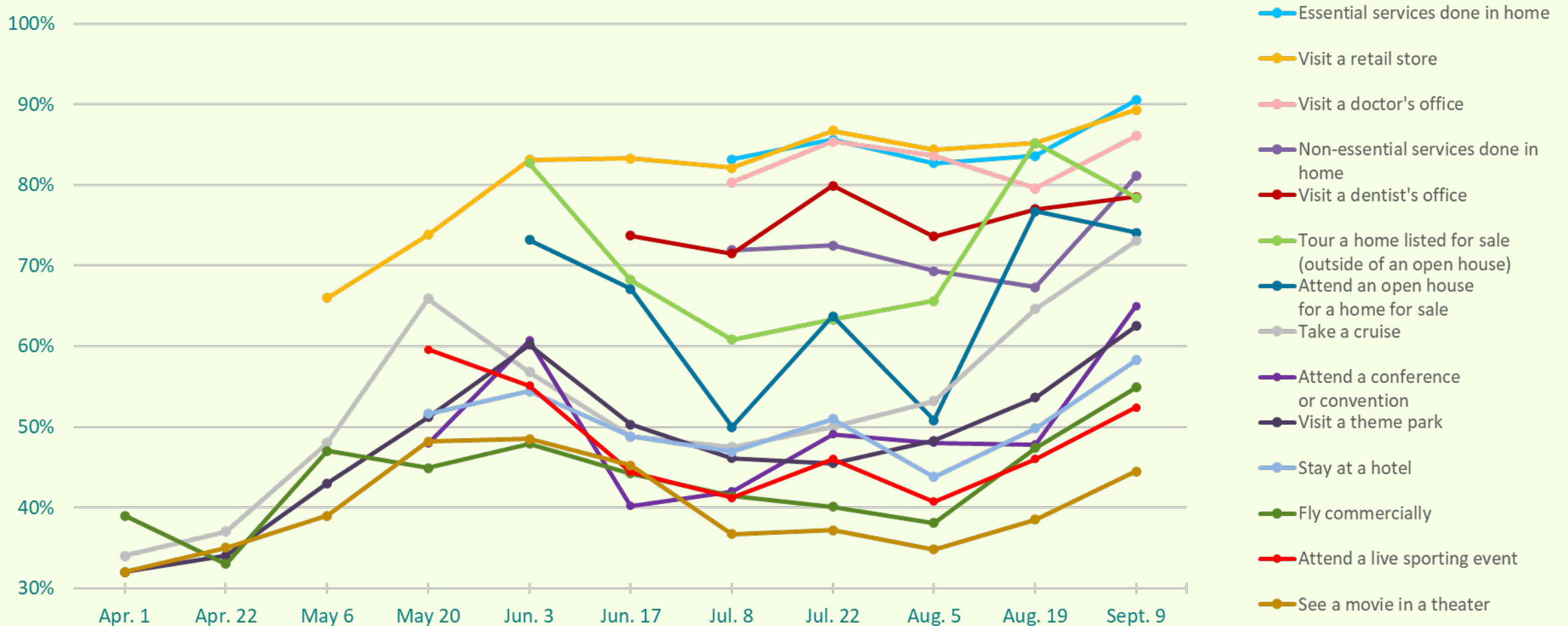
CONTEXT: RESPONDENTS ACTIVELY ENGAGE

Percent who have participated in this activity in the past 12 months



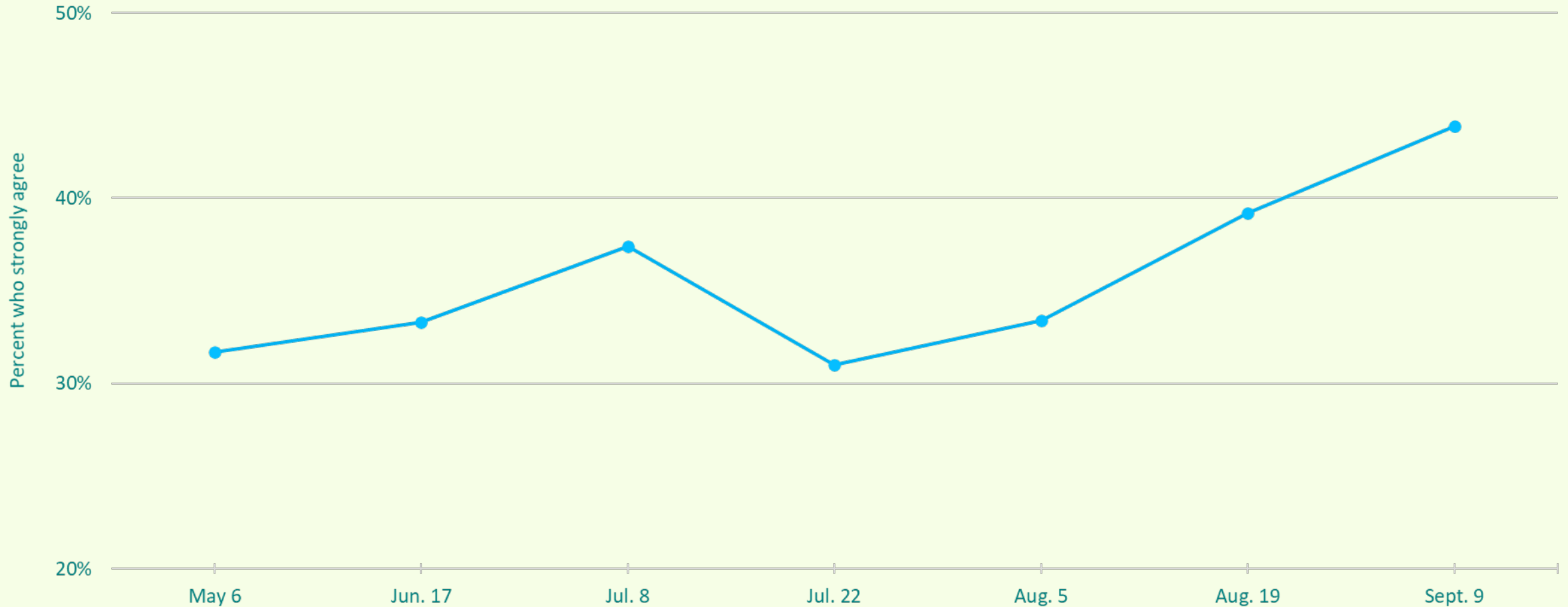
INCREASING NUMBERS ARE READY TO GO / RECENTLY ACTIVE

[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



MORE ARE READY THAN EVER TO RE-OPEN BUSINESSES

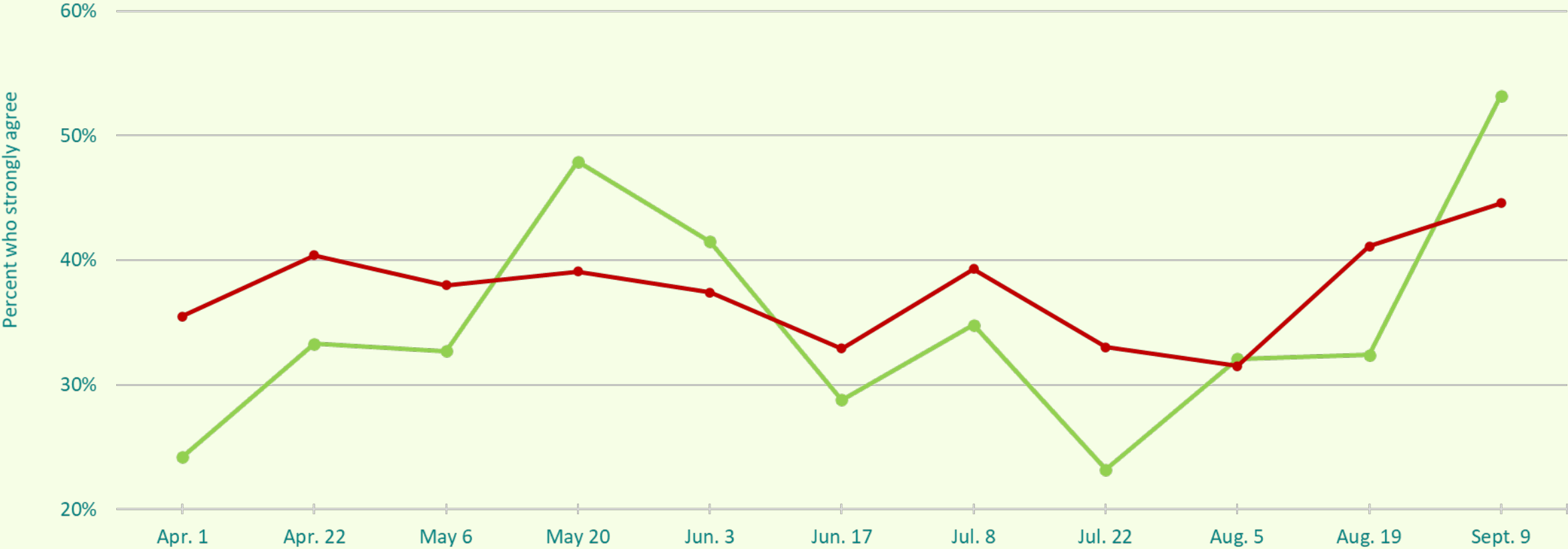
It's time for the country to open for business again.



MORE ARE READY TO TRAVEL FOR BUSINESS & PLEASURE

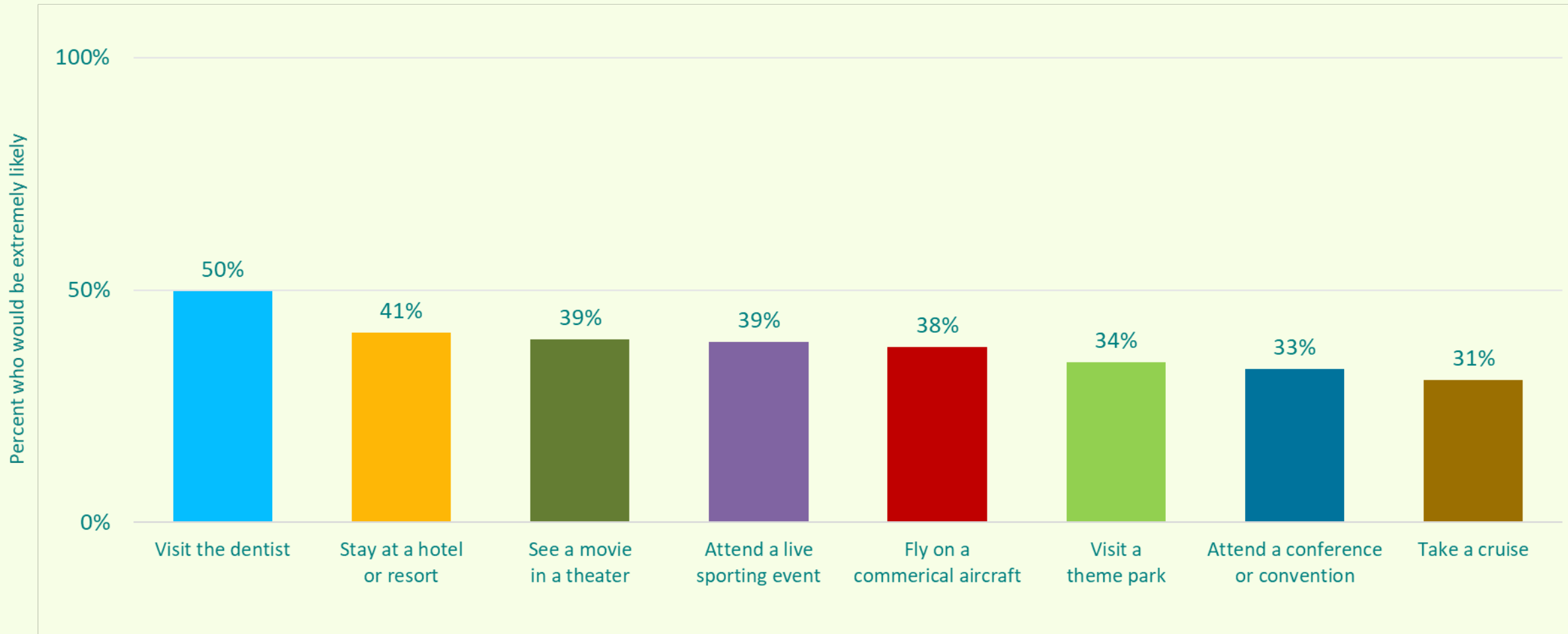
Looking ahead, please indicate how much you agree or disagree with each of the following statements...

- I plan to take the same number or more business trips over the next six months as I did last year.
- Taking a vacation of 500 miles or more is a priority for me and my family in the next 12 months.



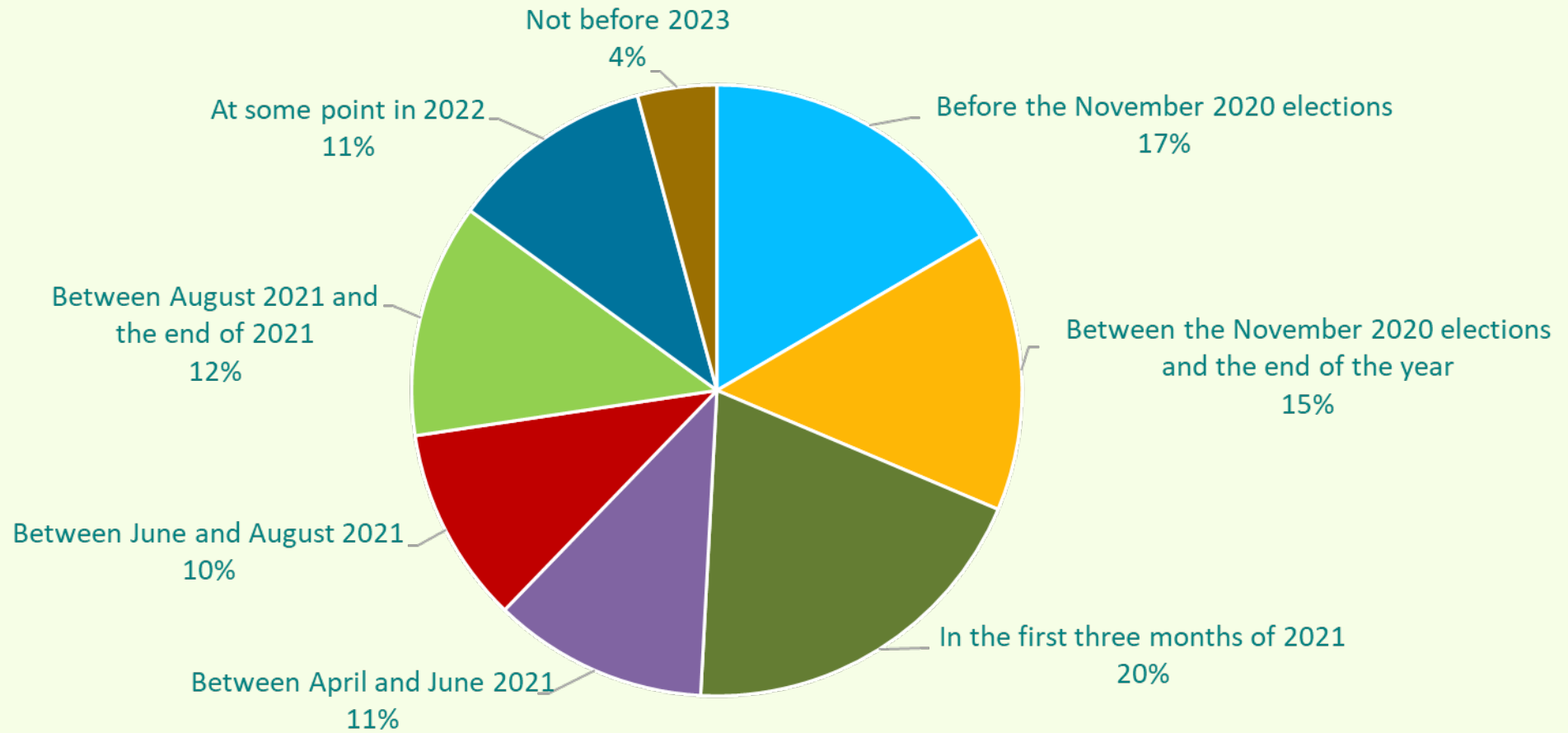
AND THEY'D BE EVEN MORE READY WITH RAPID TESTING

How much more likely would you be to do each of the following, if everyone received a rapid COVID-19 test prior to being allowed to engage in the activity, and only those negative were allowed to do so?



1/3 THINK WE'LL BE LESS FOCUSED ON COVID BY YEAR'S END

COVID-19 has affected our lives in many ways. By when do you expect that the disease will finally recede from our lives, to the point where we're not thinking about it on a daily basis?

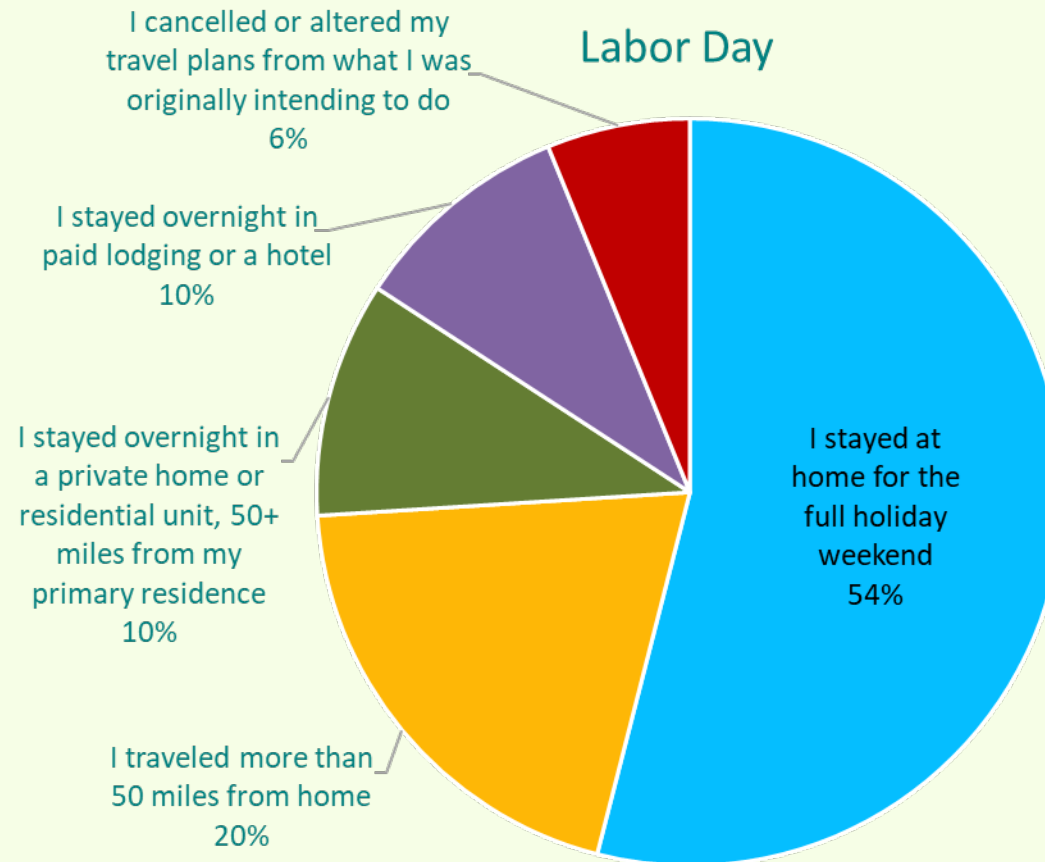




Labor Day Weekend

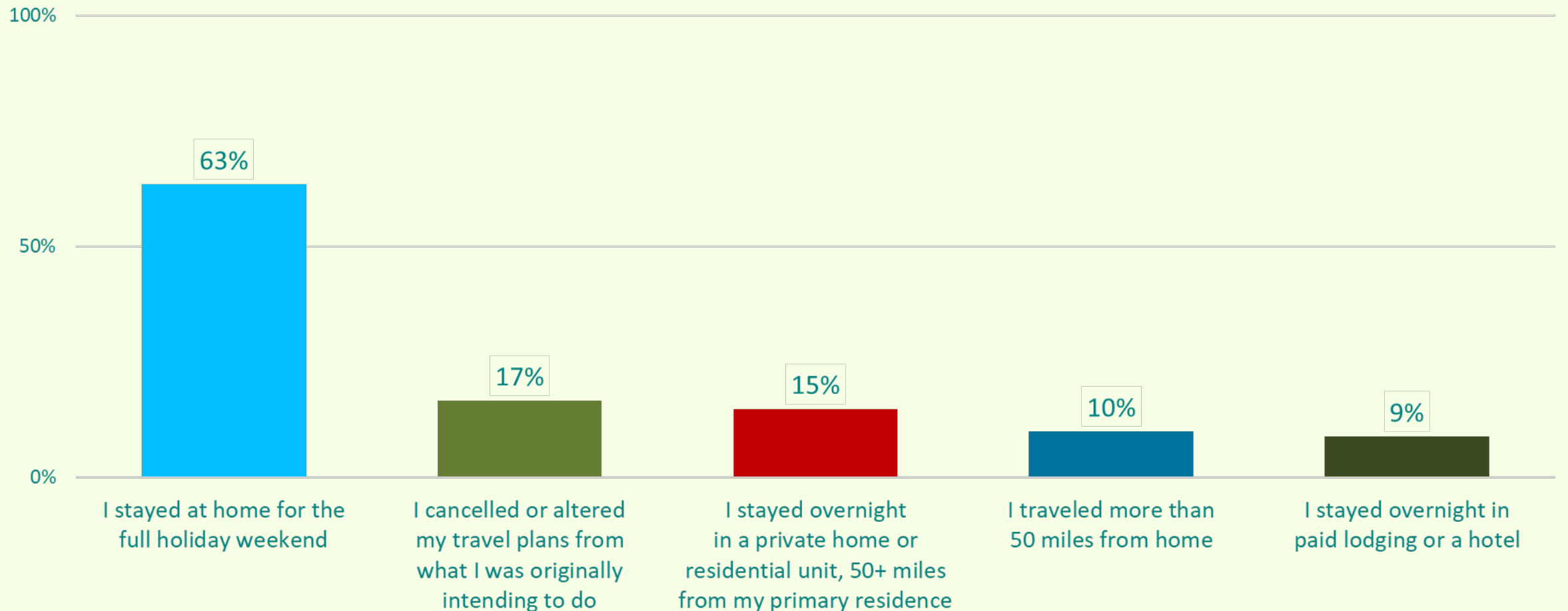
2 OUT OF 5 TRAVELED OVER LABOR DAY WEEKEND

Which of the following applies to the Labor Day weekend just completed?



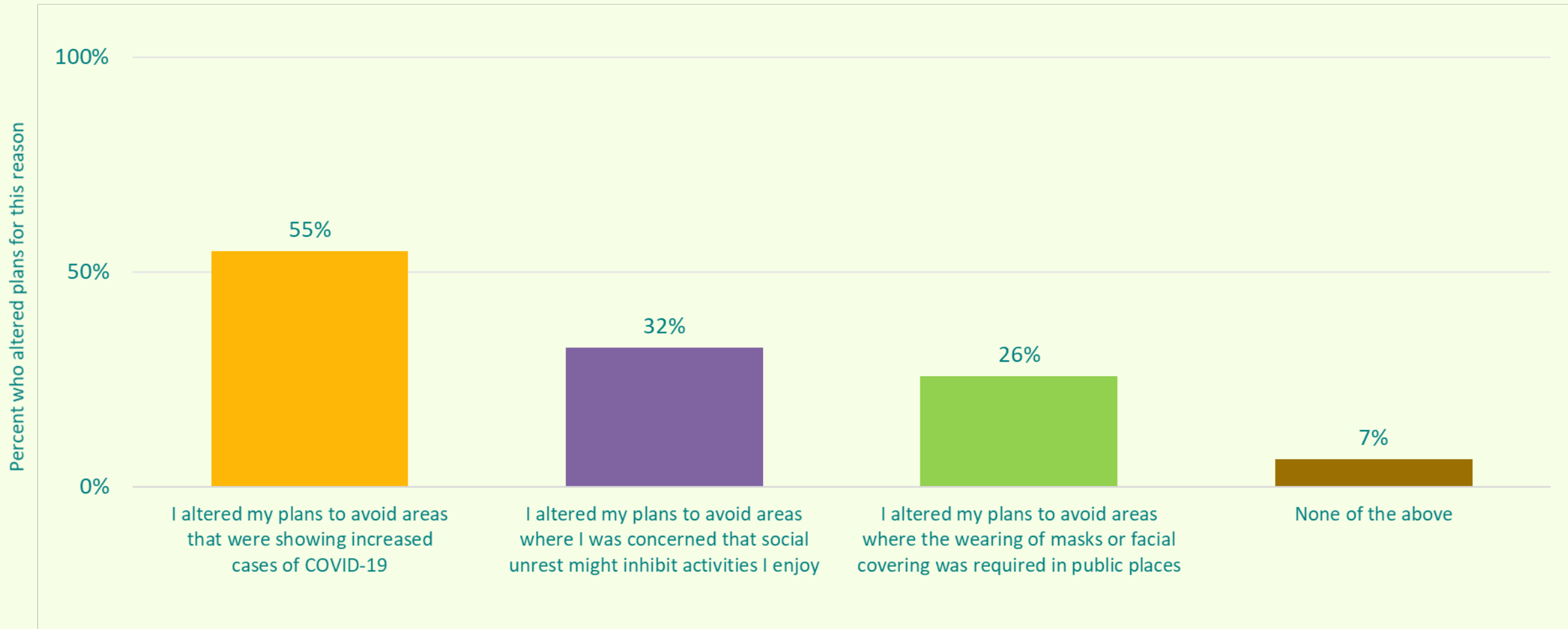
FOR COMPARISON: 2/3 STAYED AT HOME JULY 4 WEEKEND

Which of the following applies to the Fourth of July weekend just completed?



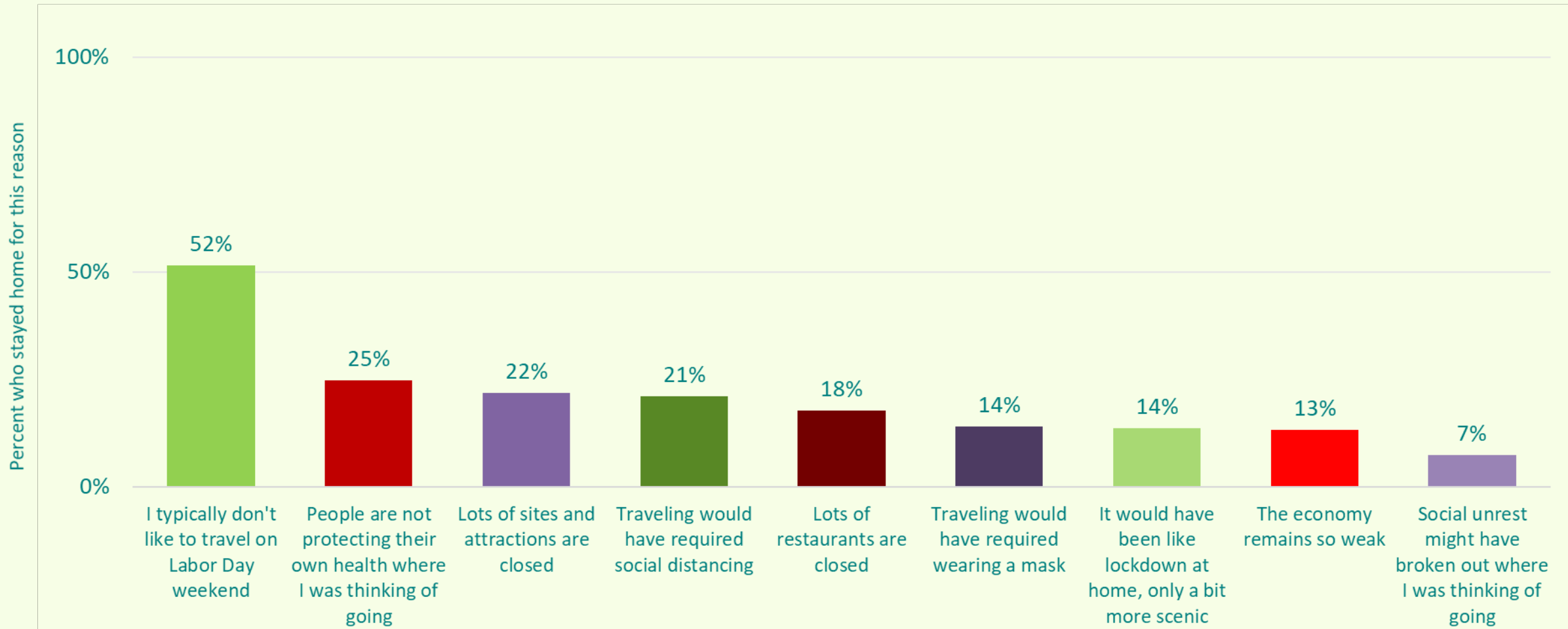
THOSE WHO ALTERED LABOR DAY PLANS DID SO FOR HEALTH

[Among those who cancelled or altered Labor Day travel plans:] Which of the following affected your Labor Day weekend travel plans? (Check all that apply)



HALF OF THOSE WHO STAYED HOME USUALLY STAY HOME

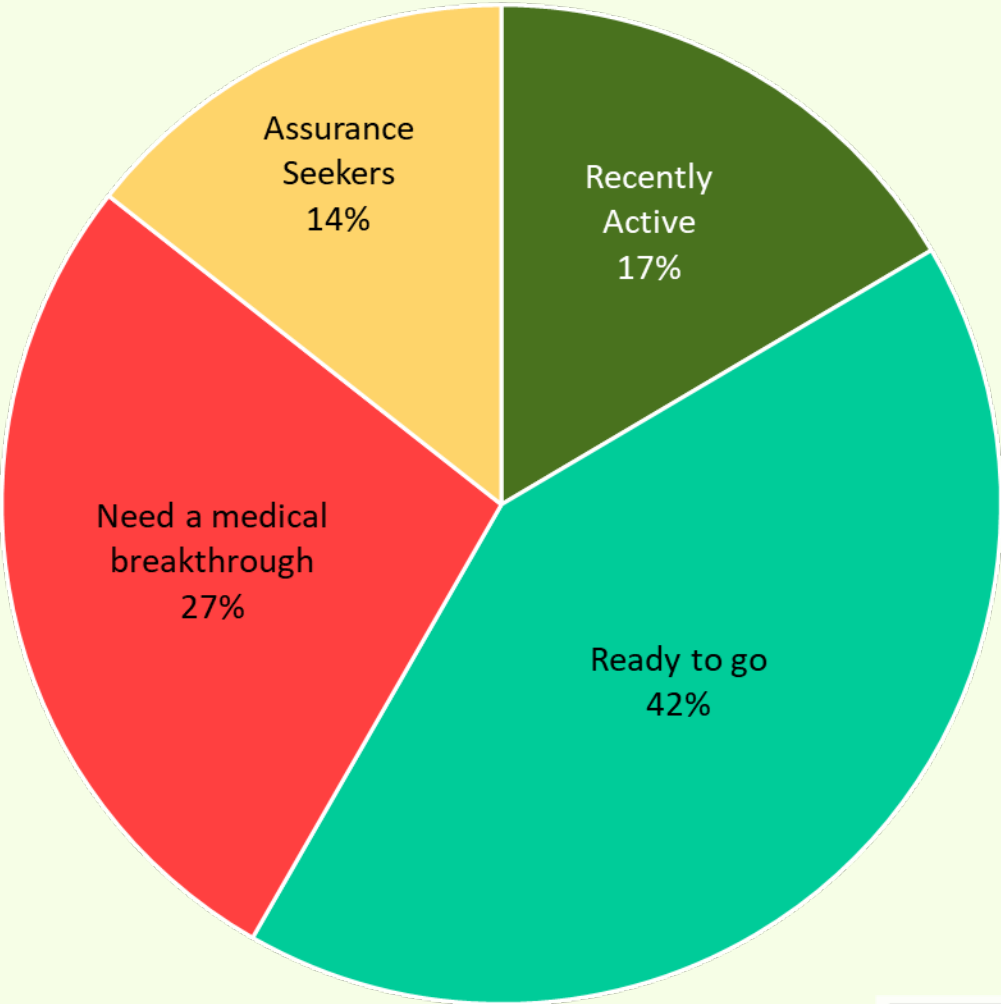
[Among those who stayed home Labor Day weekend:] Which, if any, of the following were reasons why you stayed home for the holiday weekend?



US Travel

READY OR NOT: STAY AT A HOTEL OR RESORT

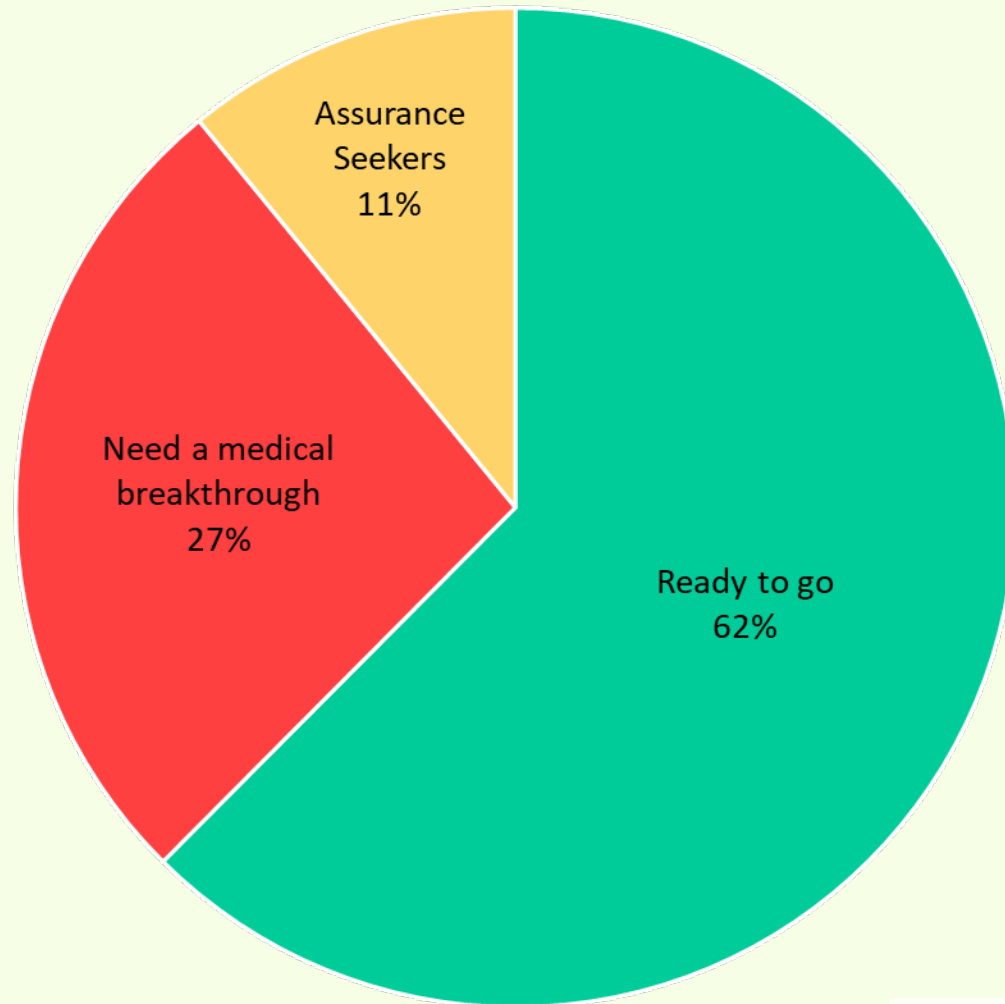
Which of the following conditions is closest to your current point of view... Stay at a hotel or resort



- Recently Active
- Ready to go
- I would 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.
- 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.

READY OR NOT: VISIT A THEME PARK

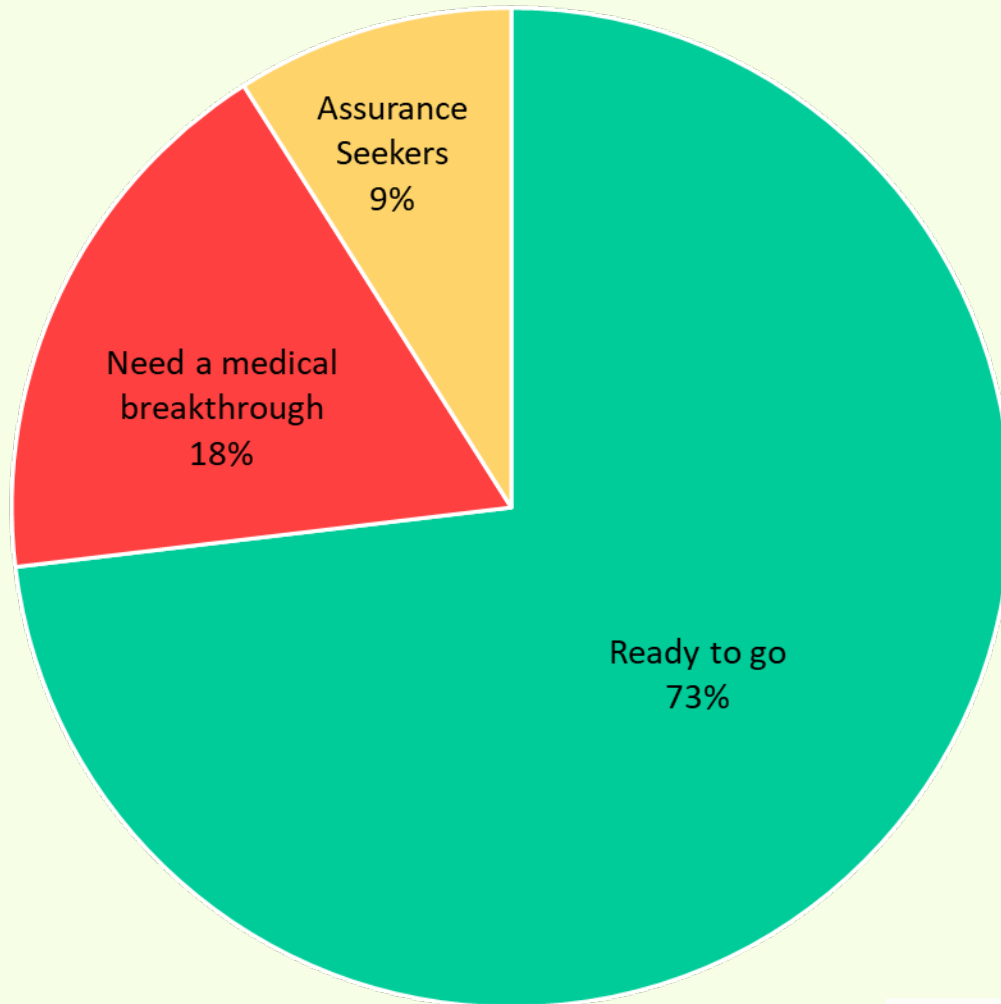
Which of the following conditions is closest to your current point of view... Visit a theme park



- Ready to go
- I would 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.
- 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.

READY OR NOT: TAKE A CRUISE VACATION

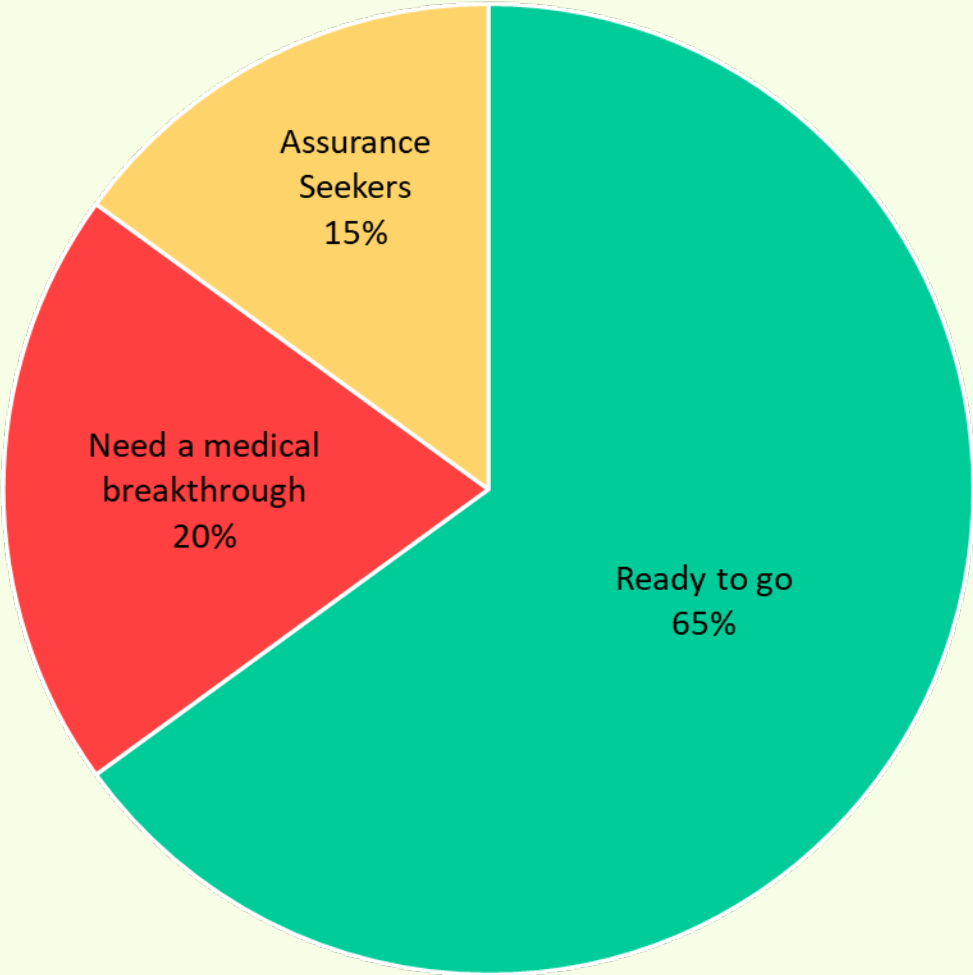
Which of the following conditions is closest to your current point of view... Take a cruise vacation



- Ready to go
- 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.
- 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.

READY OR NOT: ATTEND A CONFERENCE OR CONVENTION

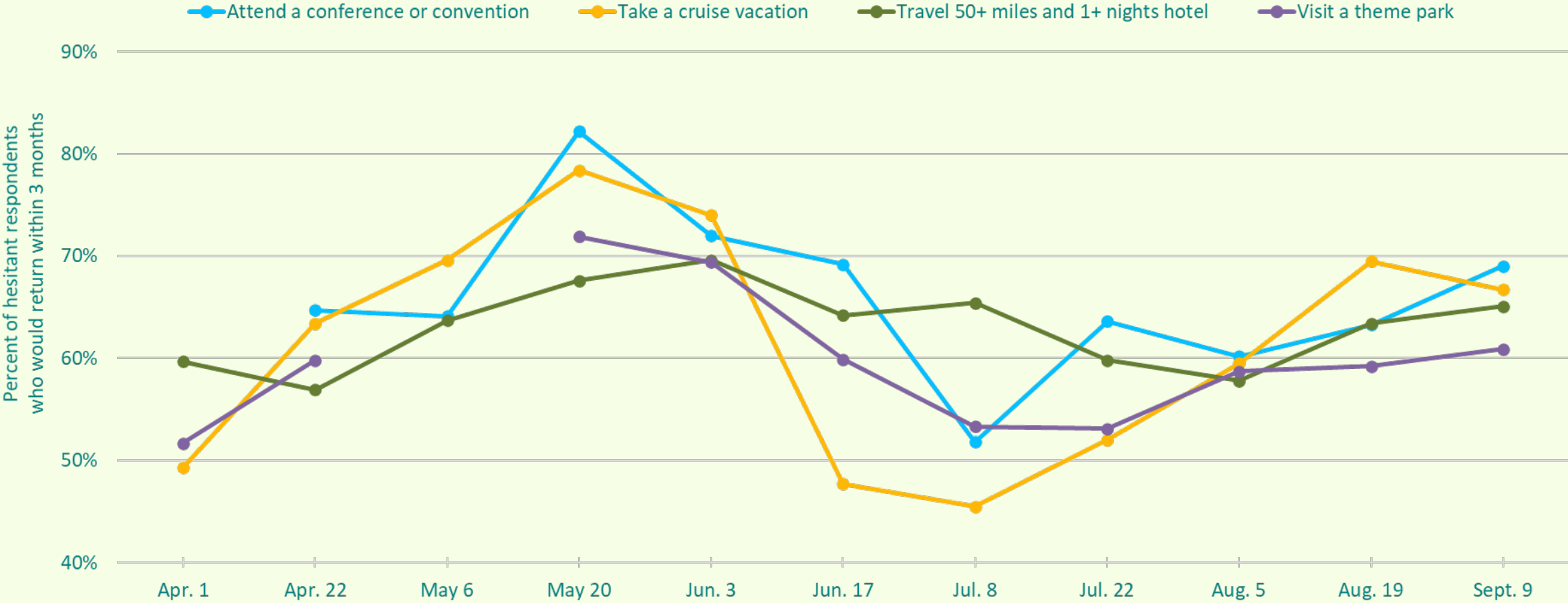
Which of the following conditions is closest to your current point of view... Attend a conference or convention



- Ready to go
- I would 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.
- 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.

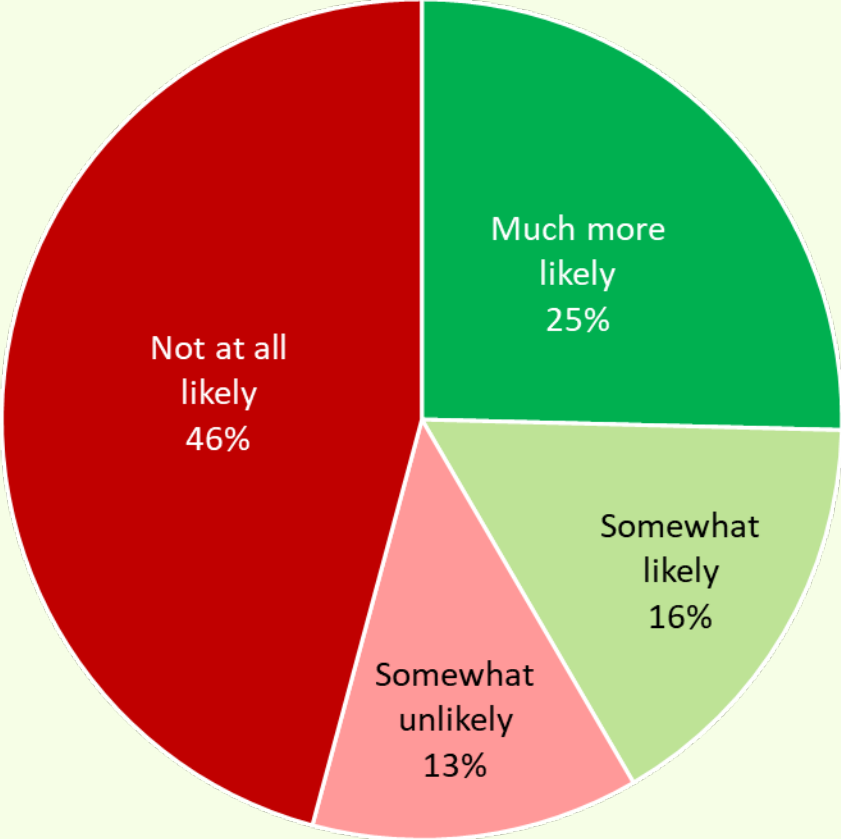
US TRAVEL: RETURN IN 3 MONTHS

[Among those hesitant:] Assuming you had the necessary assurances that it was safe to resume normal activities, how quickly would you next...



NOT LIKELY TO TRAVEL IN OCTOBER

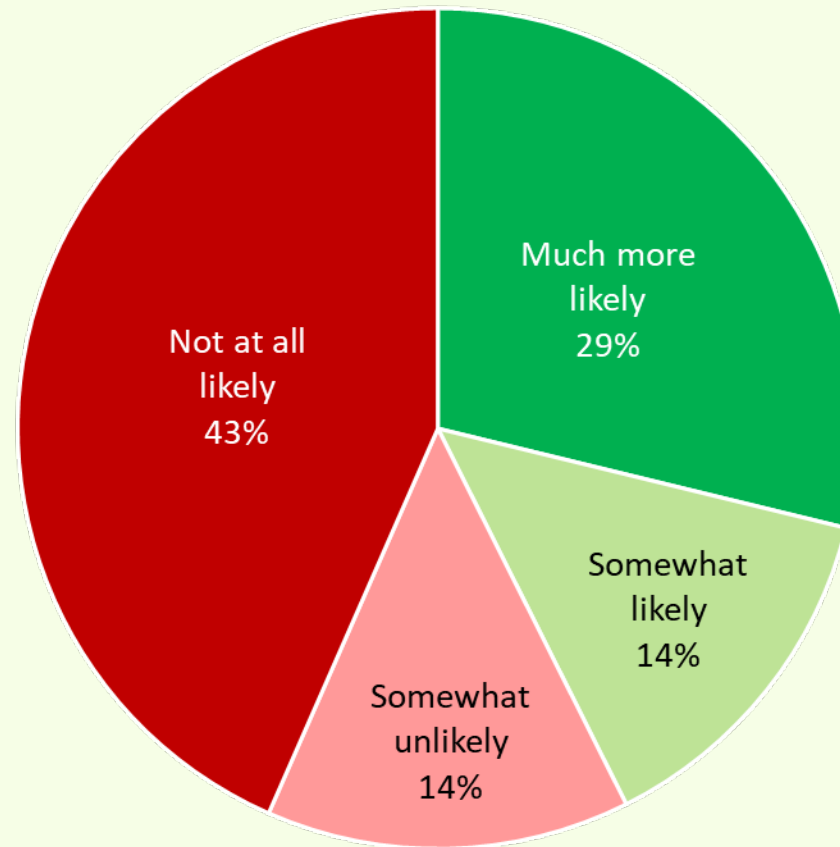
How likely are you to take a week-long family or personal vacation in the month of October?



n=500, Back to Normal Barometer, Sept. 9, 2020

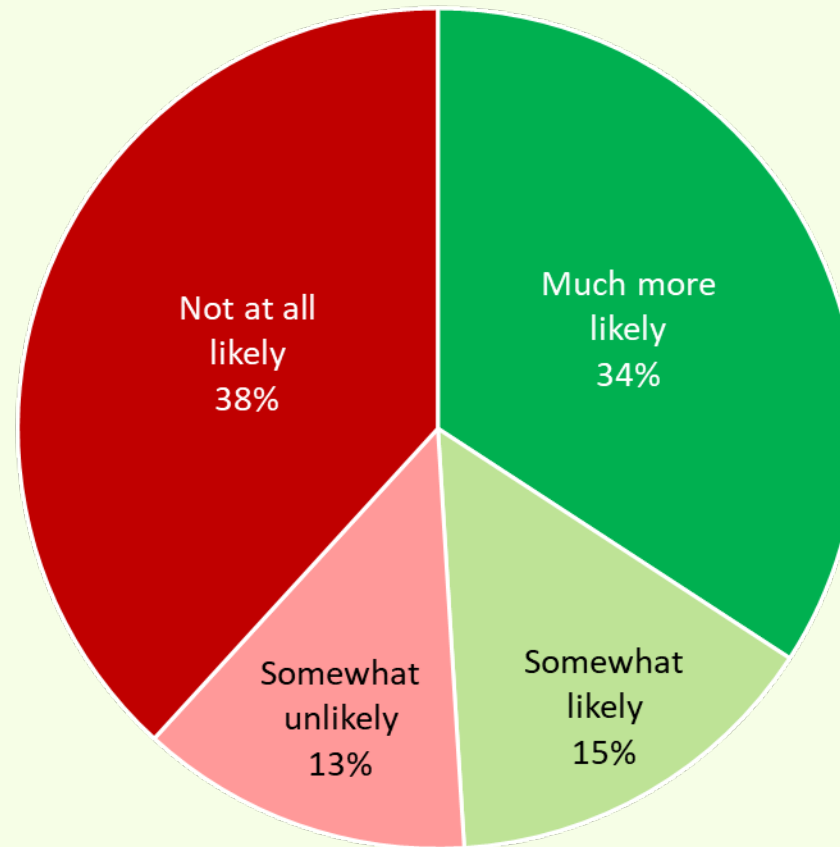
EVEN WITH REMOTE SCHOOL, STILL UNLIKELY TO TRAVEL IN OCT.

Recognizing that it's likely students will attend classes remotely this autumn, how likely would you be to take a week-long family or personal vacation during the month of October this year?



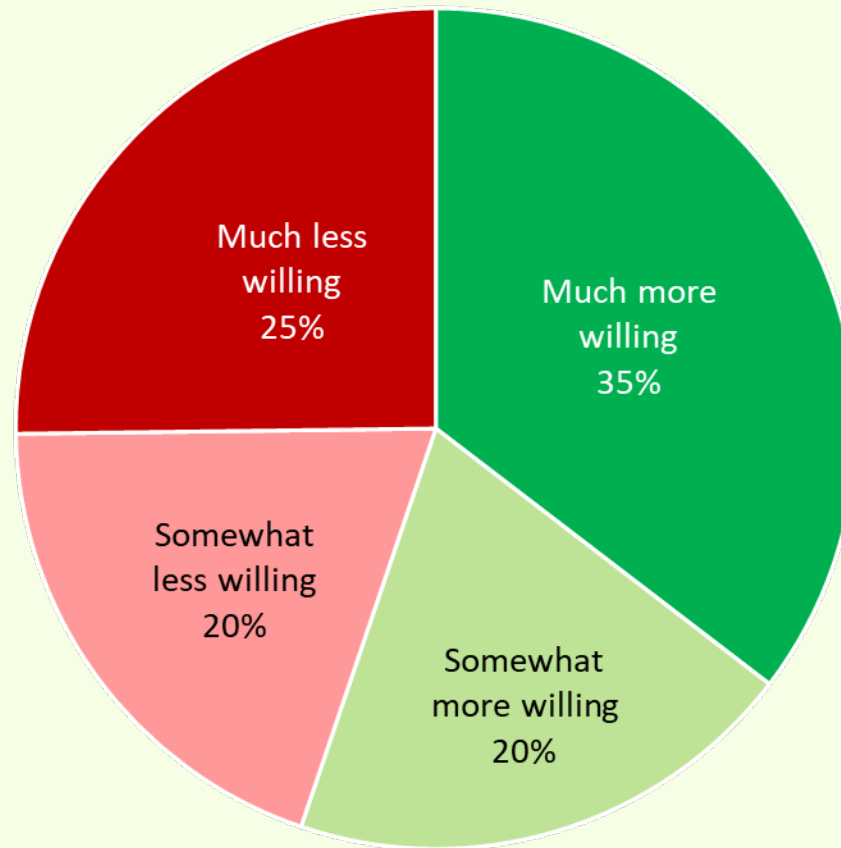
INCENTIVE SLIGHTLY INCREASES WILLINGNESS FOR OCT. TRAVEL

If you were presented with an offer to stay for eight nights but pay for just six, how likely would you be to take a week-long family or personal vacation during the month of October this year?



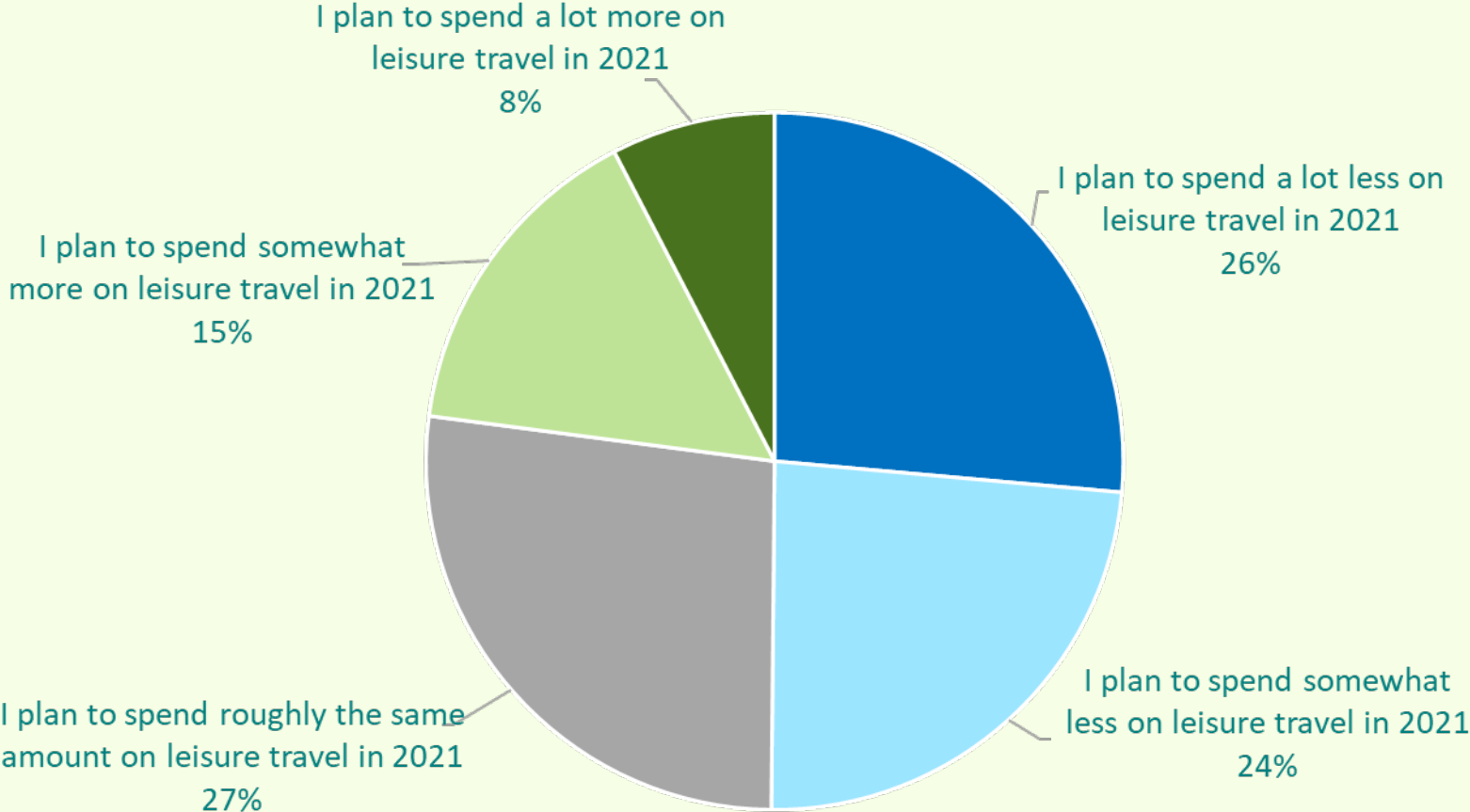
KNOWING COLLEGE KIDS ARE HOME INCREASES OTHERS' WILLINGNESS TO TRAVEL

Many colleges and universities have chosen to hold classes remotely this semester, and some have sent students back home. How does knowing that information affect your willingness to travel?



HALF PLAN TO SPEND SAME OR MORE ON '21 LEISURE TRAVEL

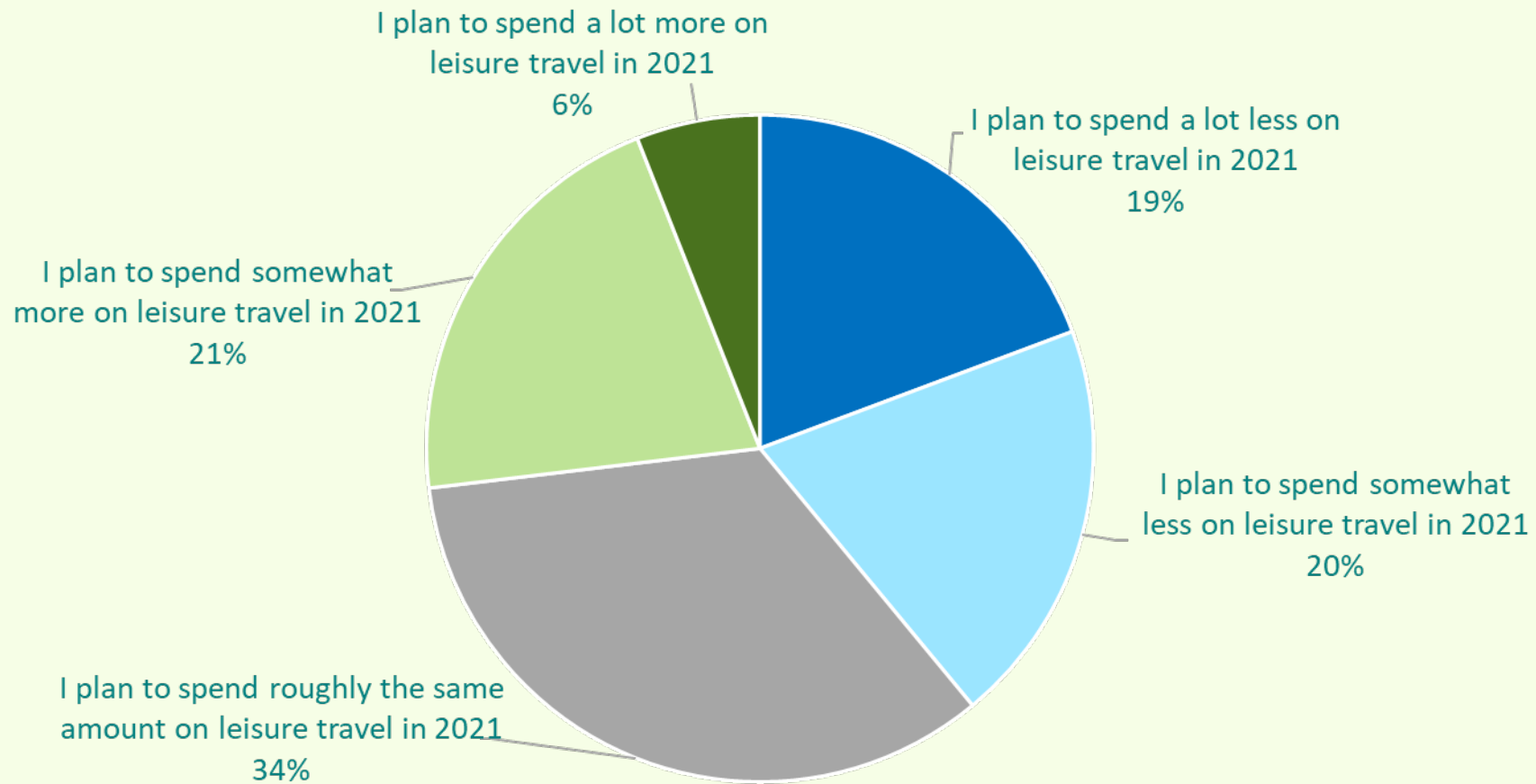
With the pandemic and recession affecting spending on leisure travel in 2020, how might that affect your leisure travel plans in 2021?



n=249, Back to Normal Barometer, Sept. 9, 2020

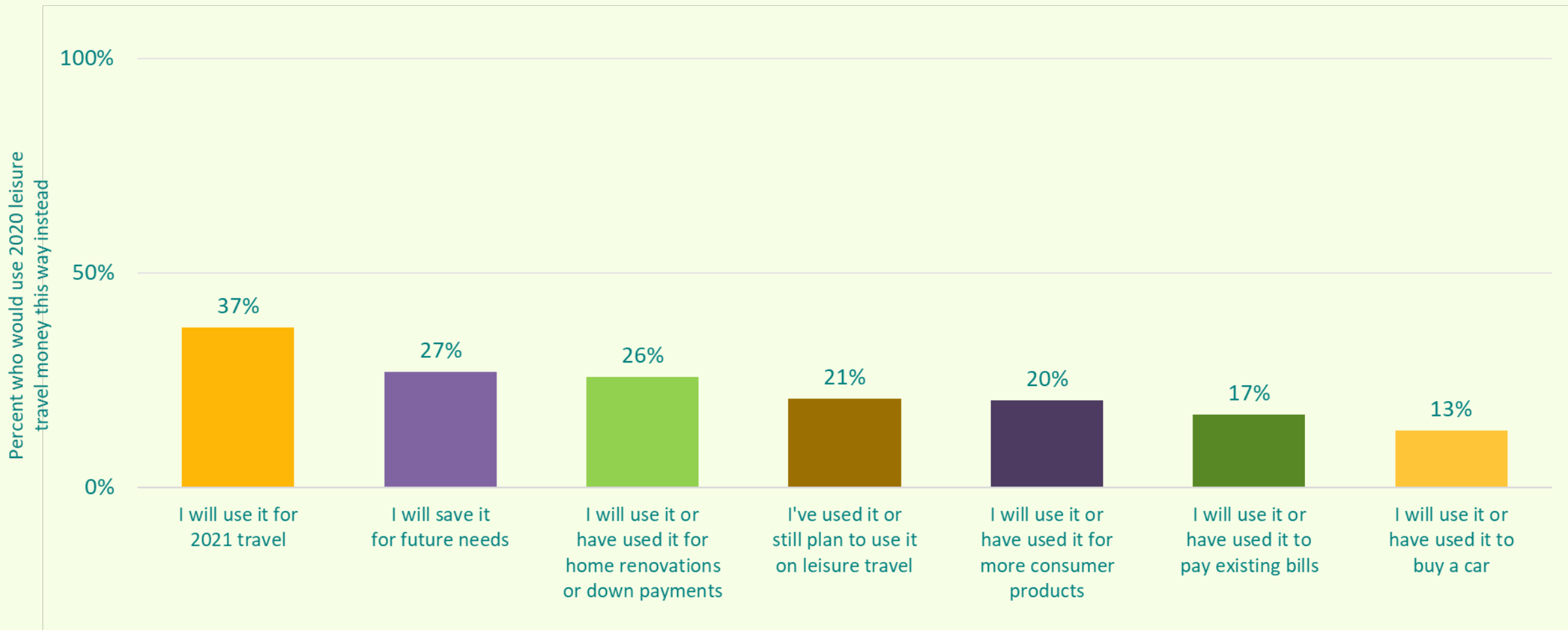
A '21 VACCINE WOULD NOT BOOST LEISURE TRAVEL SPENDING

With the pandemic and recession affecting spending on leisure travel in 2020, how might the availability of a vaccine in early 2021 affect your leisure travel plans in 2021?



HERE'S HOW THEY'RE ALLOCATING UNSPENT '20 TRAVEL \$

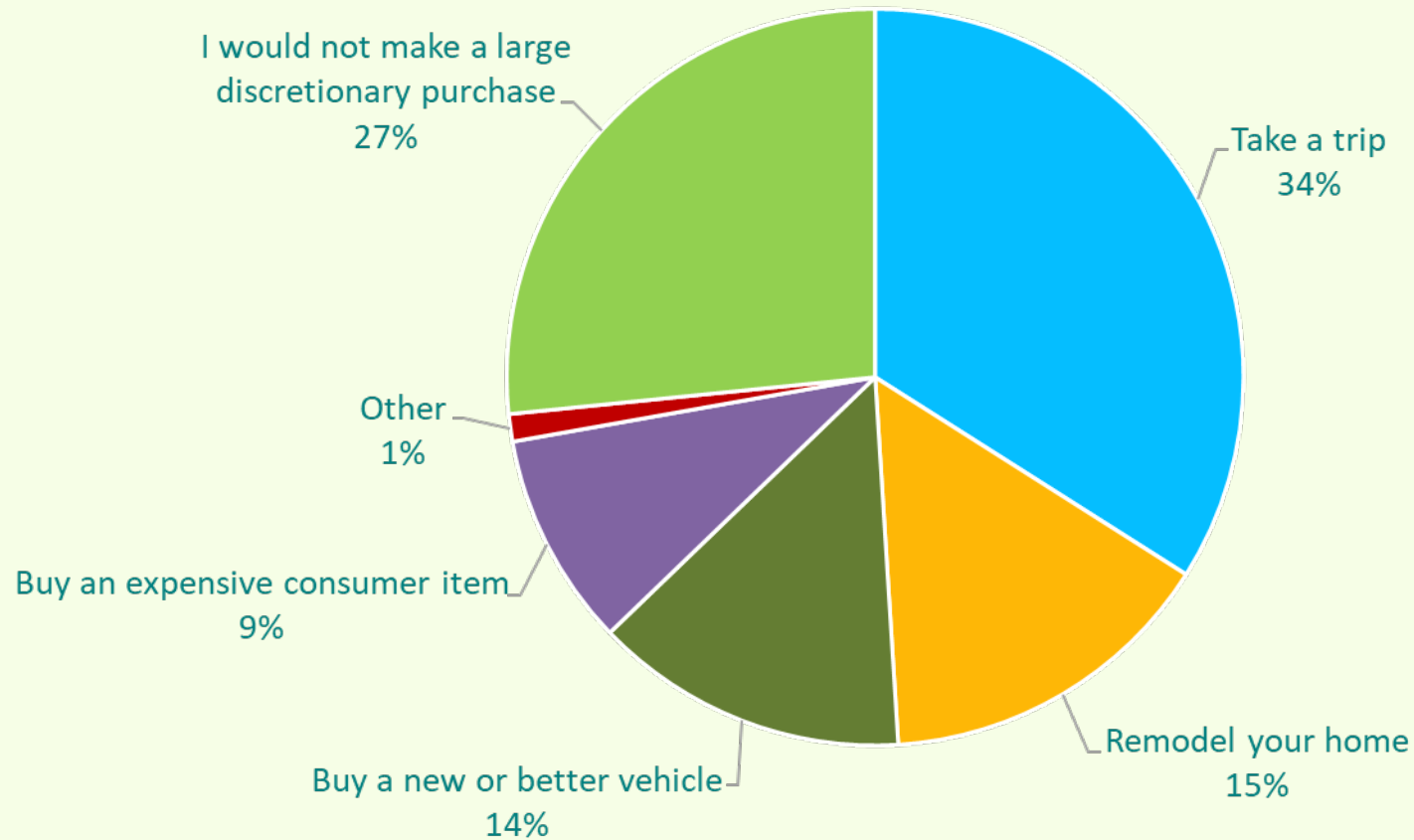
Which of the following best reflects the money you planned to spend on leisure travel in 2020? (Check all that apply)



n=500, Back to Normal Barometer, Sept. 9, 2020

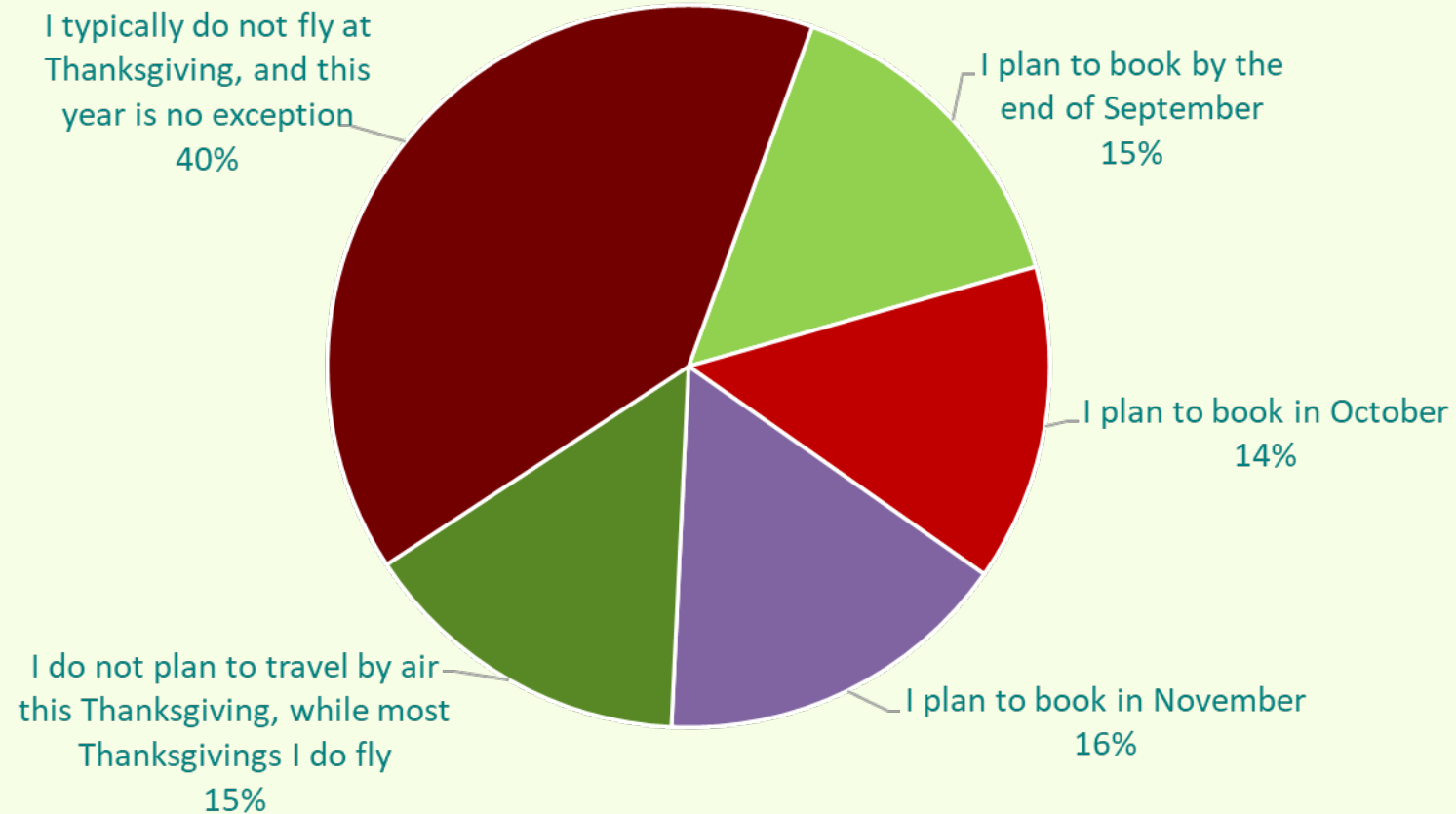
1/3 WOULD TAKE A TRIP OF PANDEMIC ENDED TOMORROW

If the pandemic suddenly ended tomorrow, what one large discretionary purchase would you make?



1/6 OF THOSE WHO FLY THANKSGIVING WON'T THIS YEAR

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



QUESTIONS

- What questions do you have for us?
- What questions should we ask in wave 12?

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