

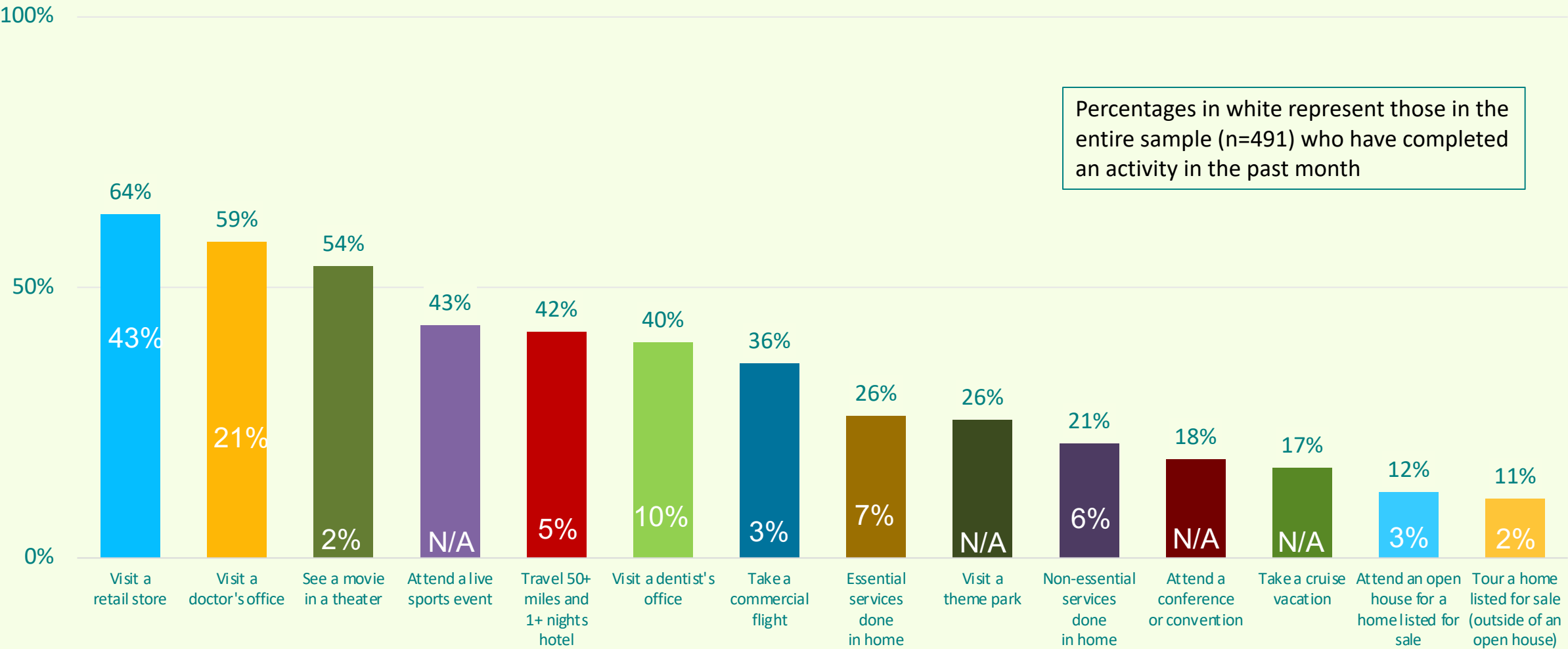
WAVE 10: OUR CHANGED LANDSCAPE

Public opinion insights from the August 19, 2020 “Back-to-Normal Barometer”

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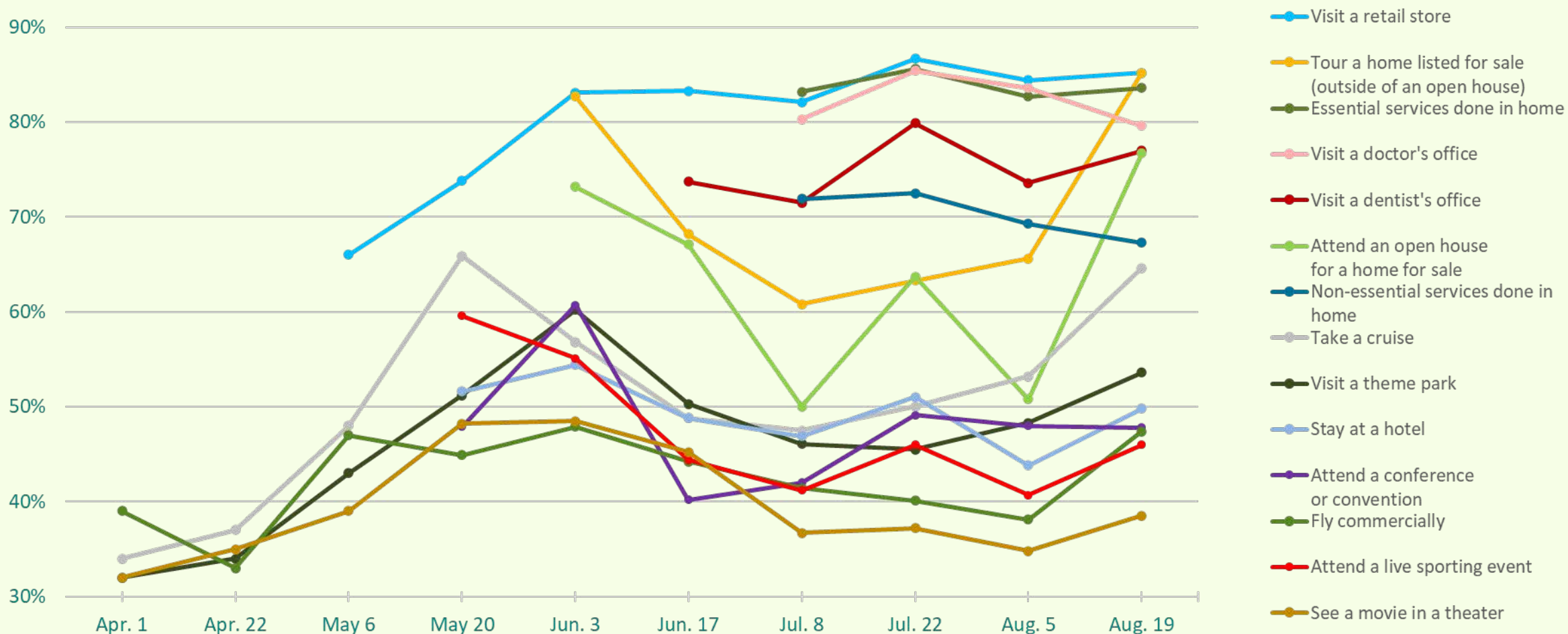
CONTEXT: RESPONDENTS ACTIVELY ENGAGE

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

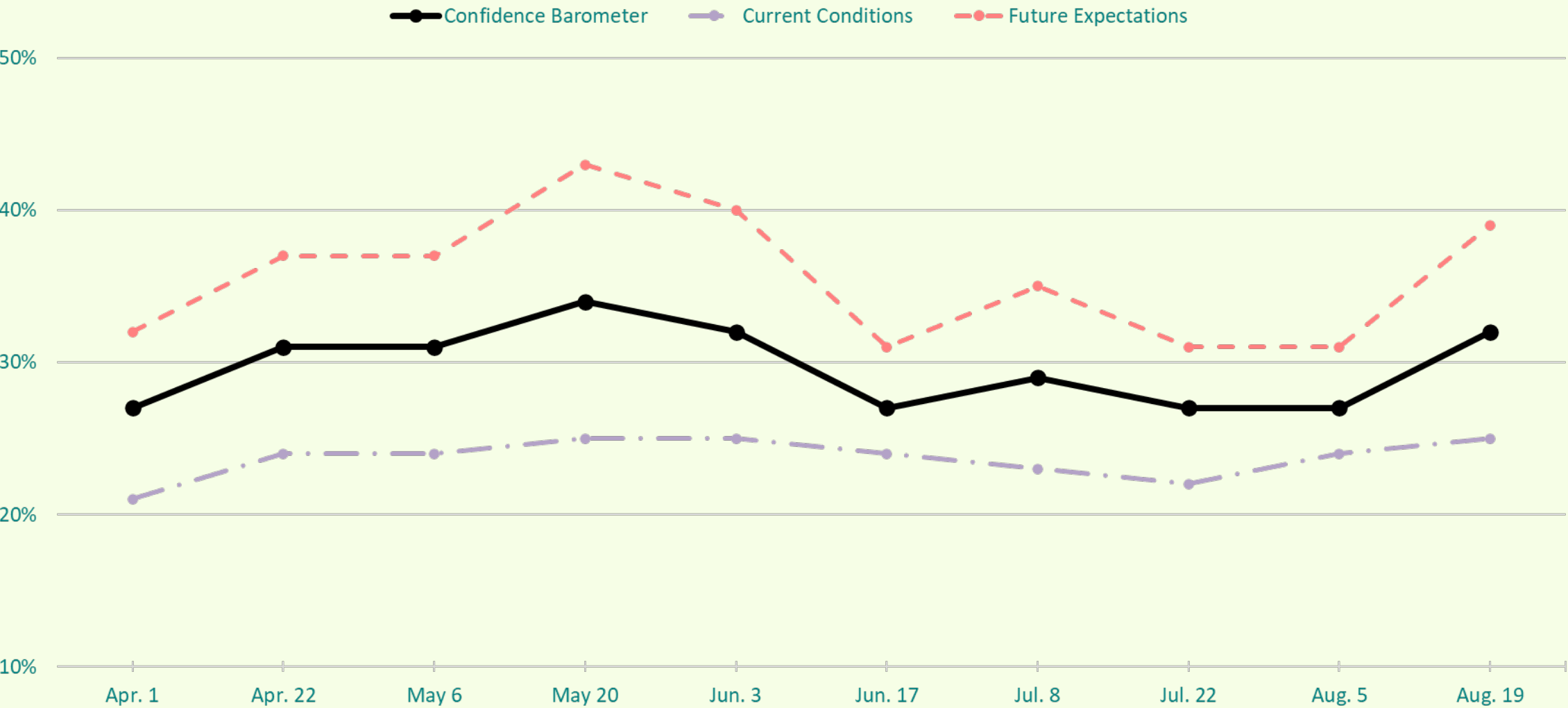


SIZABLE % WOULD RETURN TOMORROW

[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



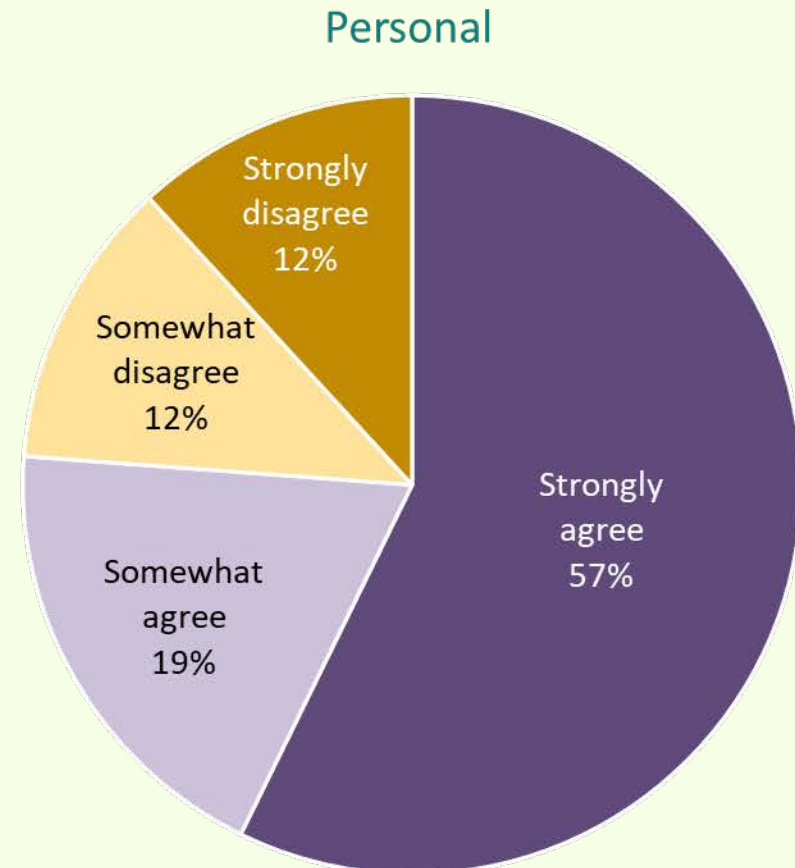
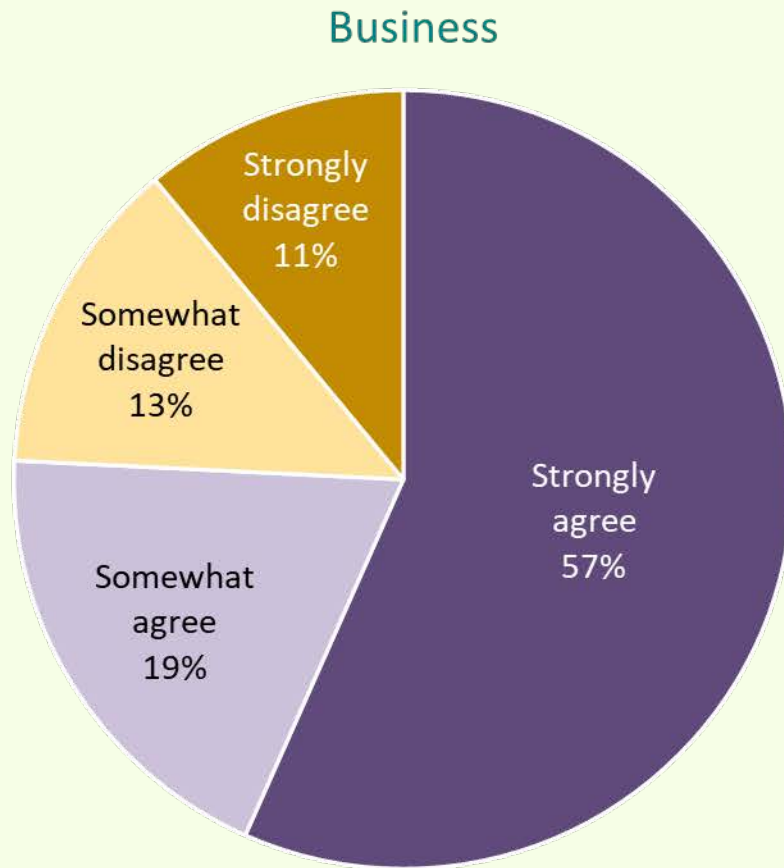
CONFIDENCE BAROMETER SHOWS AN UPTICK



Back to Normal Barometer, Aug. 19, 2020

BUT, “BIG PICTURE,” MOST THINK 2020 IS A “LOST YEAR”

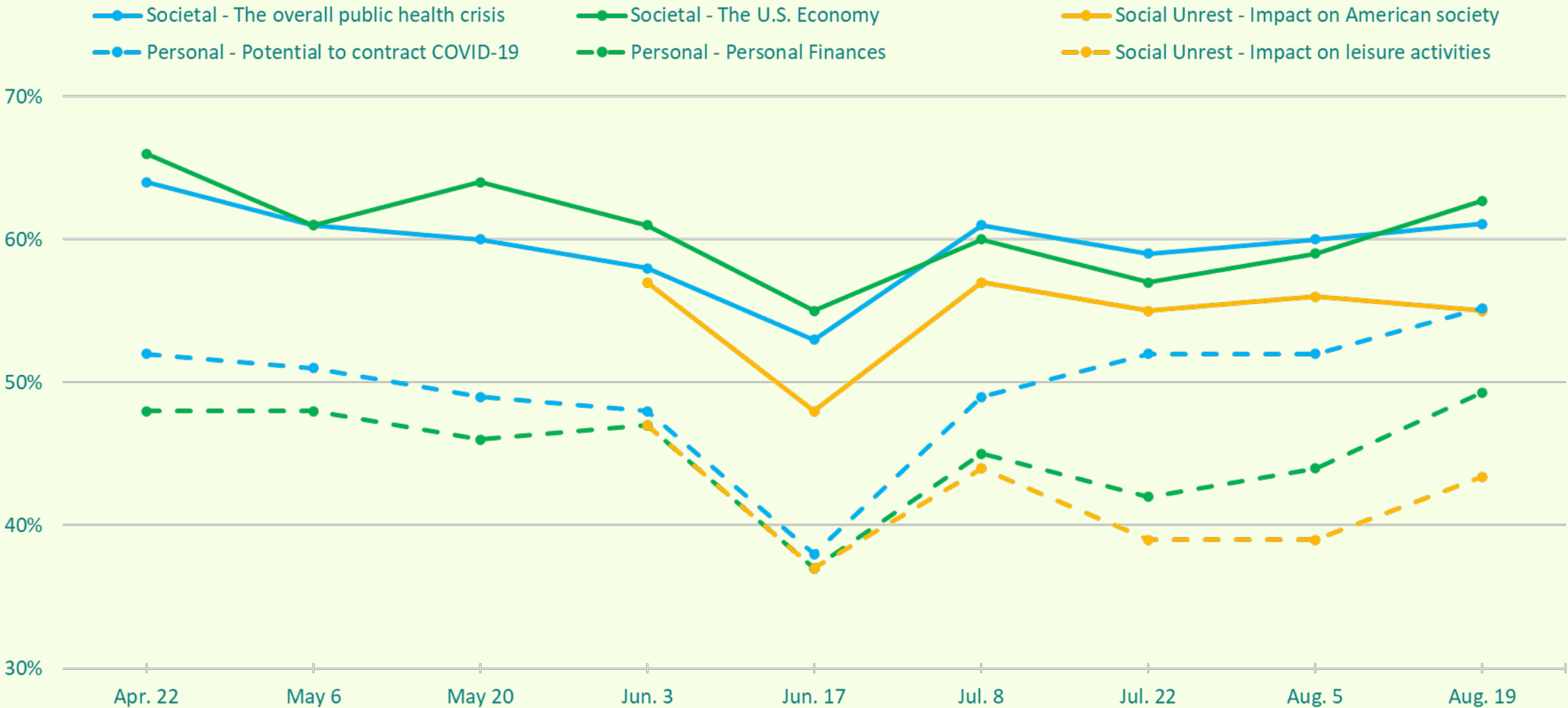
From a business/personal perspective, I feel like the year 2020 is a lost year.



IT'S NOT TOTALLY LOST, THOUGH

- For business: Depends on type of business (if it closed), but in general the pandemic has been a big-time struggle, but it also has caused businesses to think about innovation and to do things differently/better
 - “Because we’ve had to band together (businesses in a ski resort town), our sense of community has gotten stronger”
 - “It has forced them (small businesses) to change their business model to adjust...and it is actually helpful”
 - “I had a business idea come to me because of this (pandemic).”
- Personally: Change is positive/inevitable, a “reset” spending time together.
 - “I’m alive”
 - “We were able to spend more time together, me and my daughters...these are moments that I can’t get back.”
 - “It’s a year when you really got to look on the positive...get the extra time together that normally we’re rushing”
 - “We’re all going to experience change, and this is dramatic and different – we’re not used to this level of change”

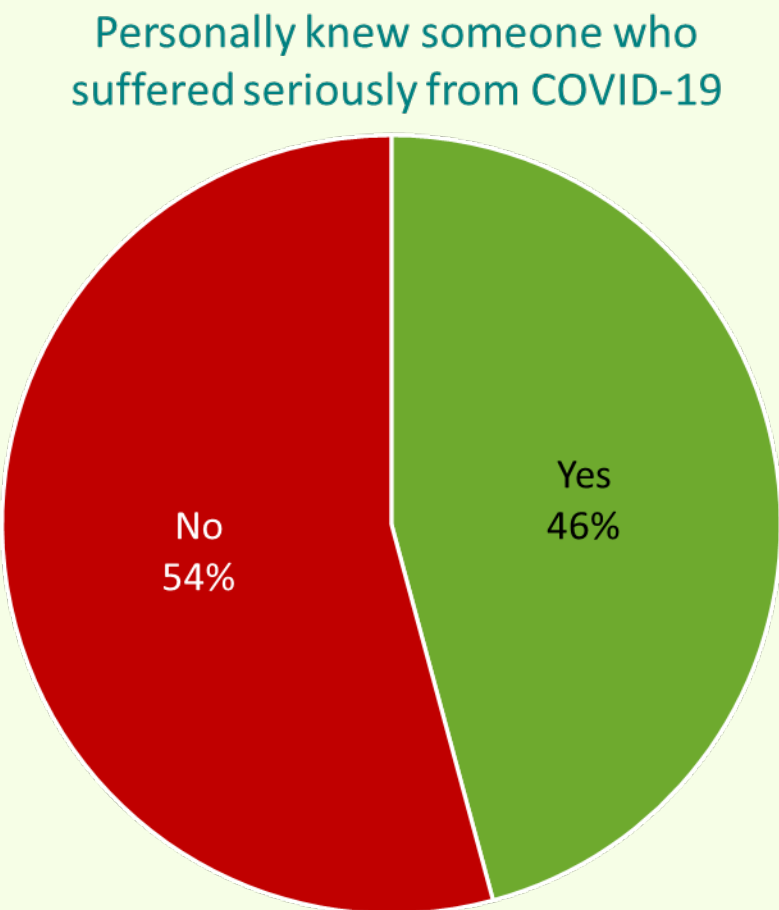
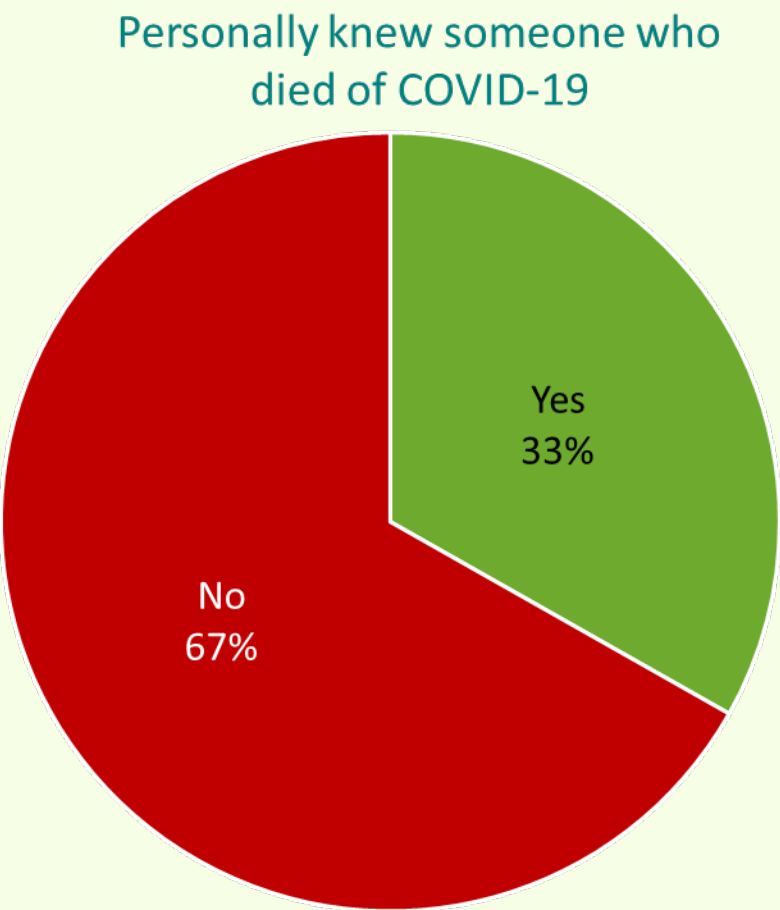
SOCIETAL CONCERNS STILL SUPERSEDE PERSONAL ONES



% saying they are very concerned;
Back to Normal Barometer, Aug. 19, 2020

NEARLY HALF KNOW SOMEONE WHO SUFFERED FROM COVID-19

Do you know anyone personally who [died of COVID-19/suffered seriously from COVID-19 but did not die]?

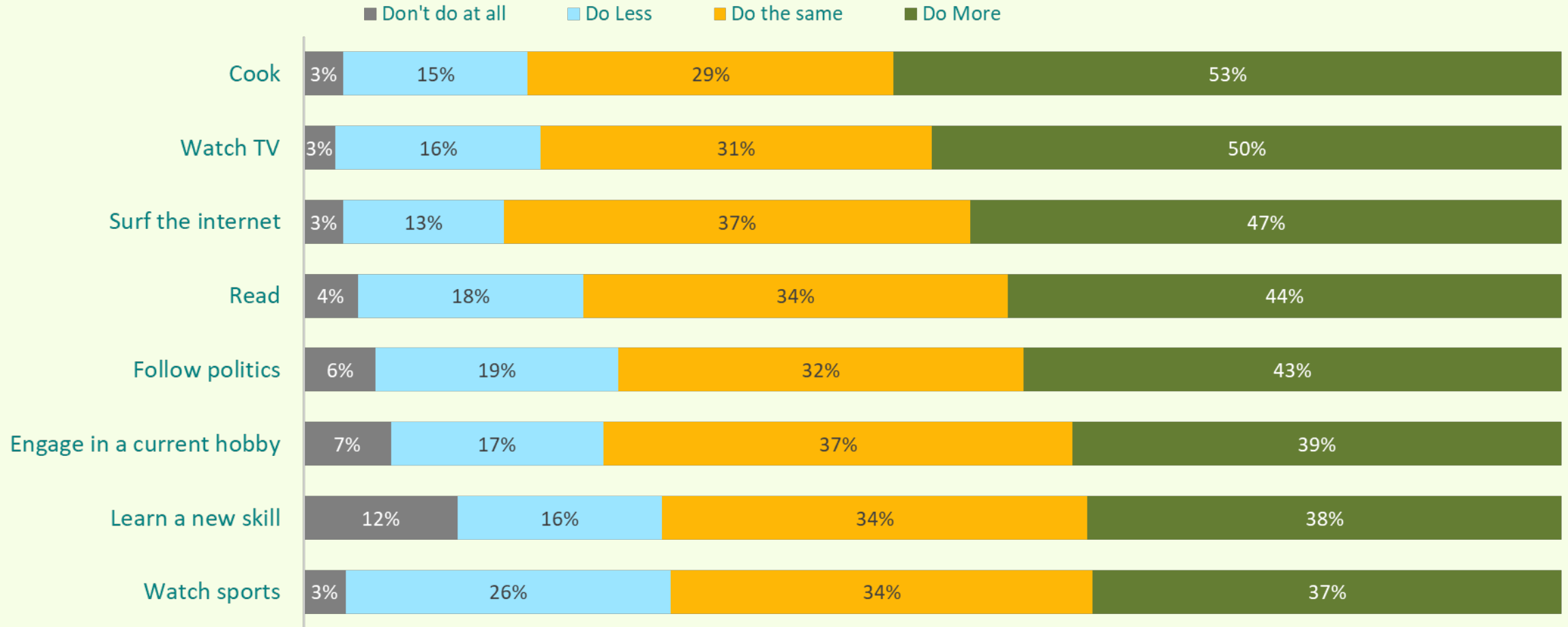




Engagement— and impediments to engagement

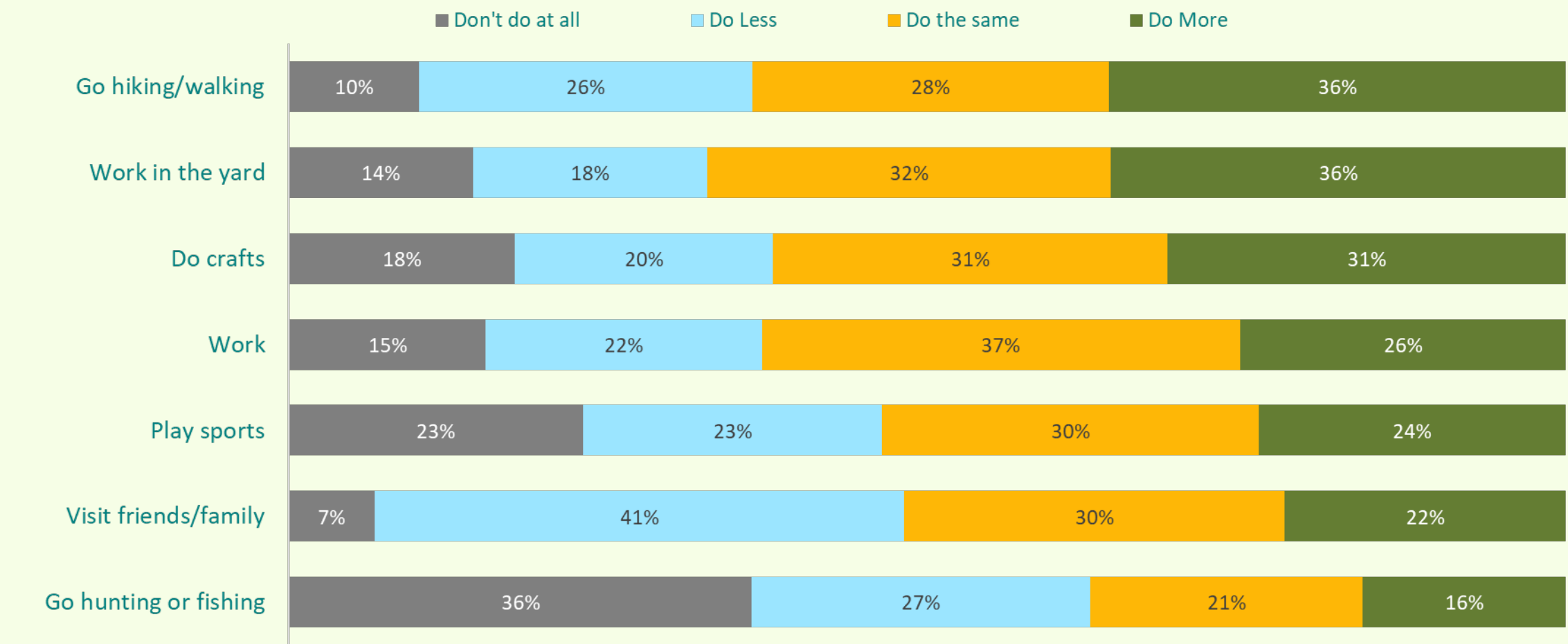
HOW CONSUMERS PLAN TO KEEP THEMSELVES BUSY THIS FALL

Compared to autumn 2019, which of the following do you expect to do more of, or less of, this coming autumn?



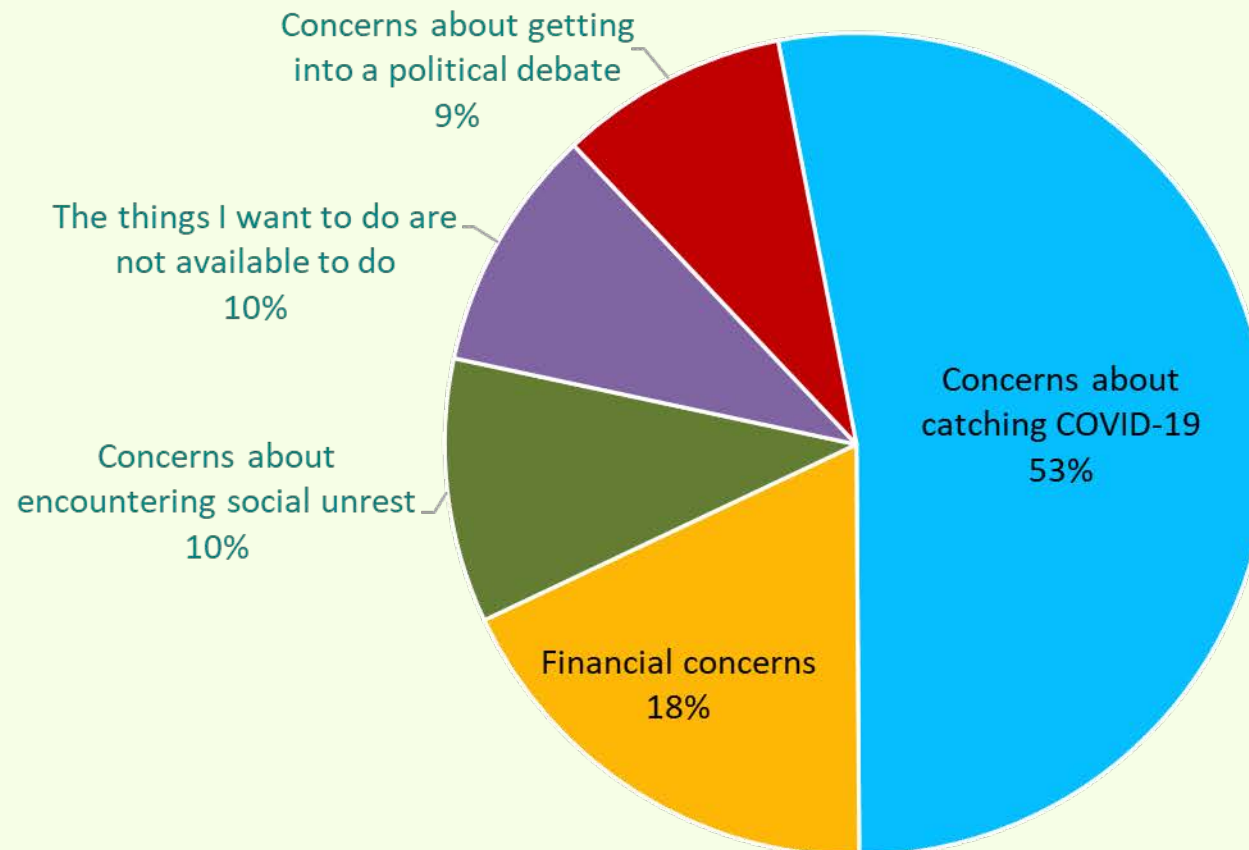
HOW CONSUMERS PLAN TO KEEP THEMSELVES BUSY (CONT'D)

Compared to autumn 2019, which of the following do you expect to do more of, or less of, this coming autumn?



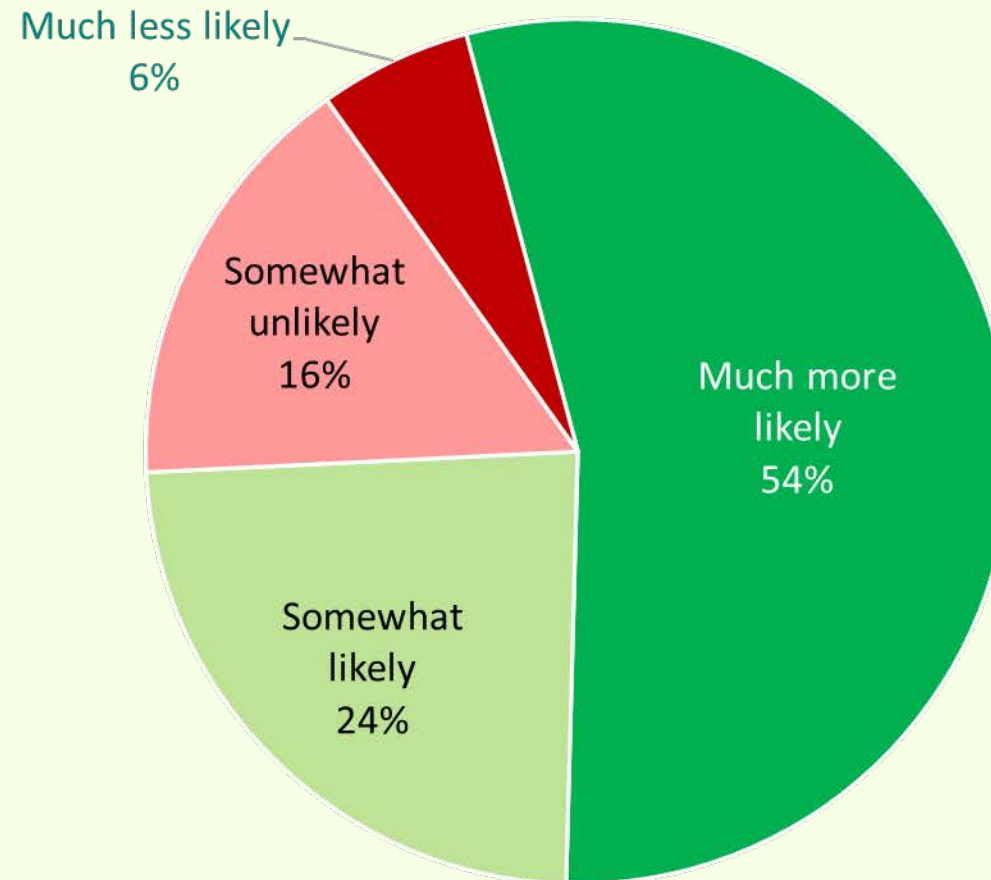
BY FAR, THE GREATEST IMPEDIMENT IS HEALTH, NOT MONEY

There are a number of reasons why people these days are refraining from some of their normal activities, such as travel, leisure, sports, and entertainment. For you personally, what is the one reason you may not be doing all that you typically do?



THERE'S A WAY OUT, IF ONLY EVERYONE WOULD COOPERATE

Imagine you knew for sure that everyone you encountered outside your home on a day-to-day basis wore a proper face covering and stayed six feet apart from each other. How much more likely would you be to engage in more of your typical daily activities?

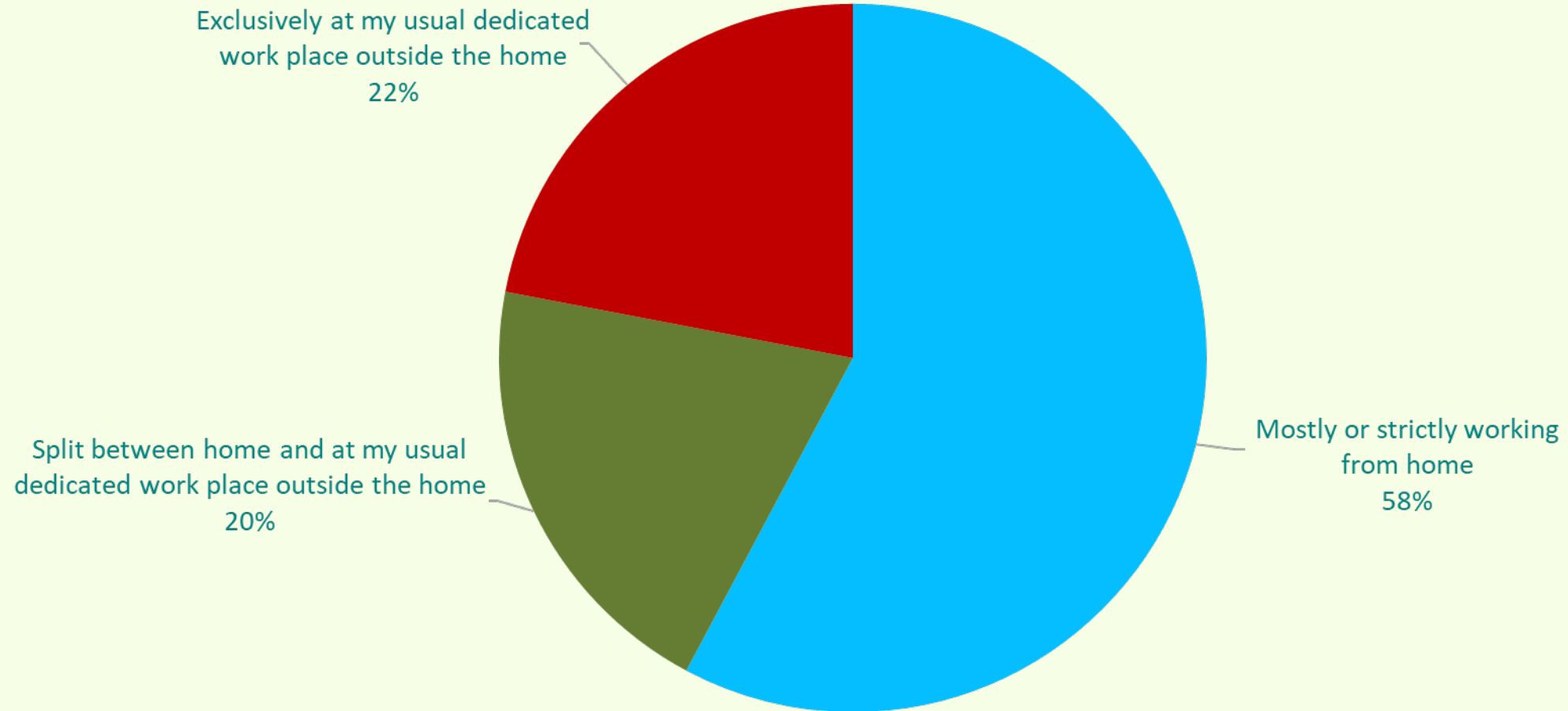




How COVID has upended— and will continue to upend— the workplace

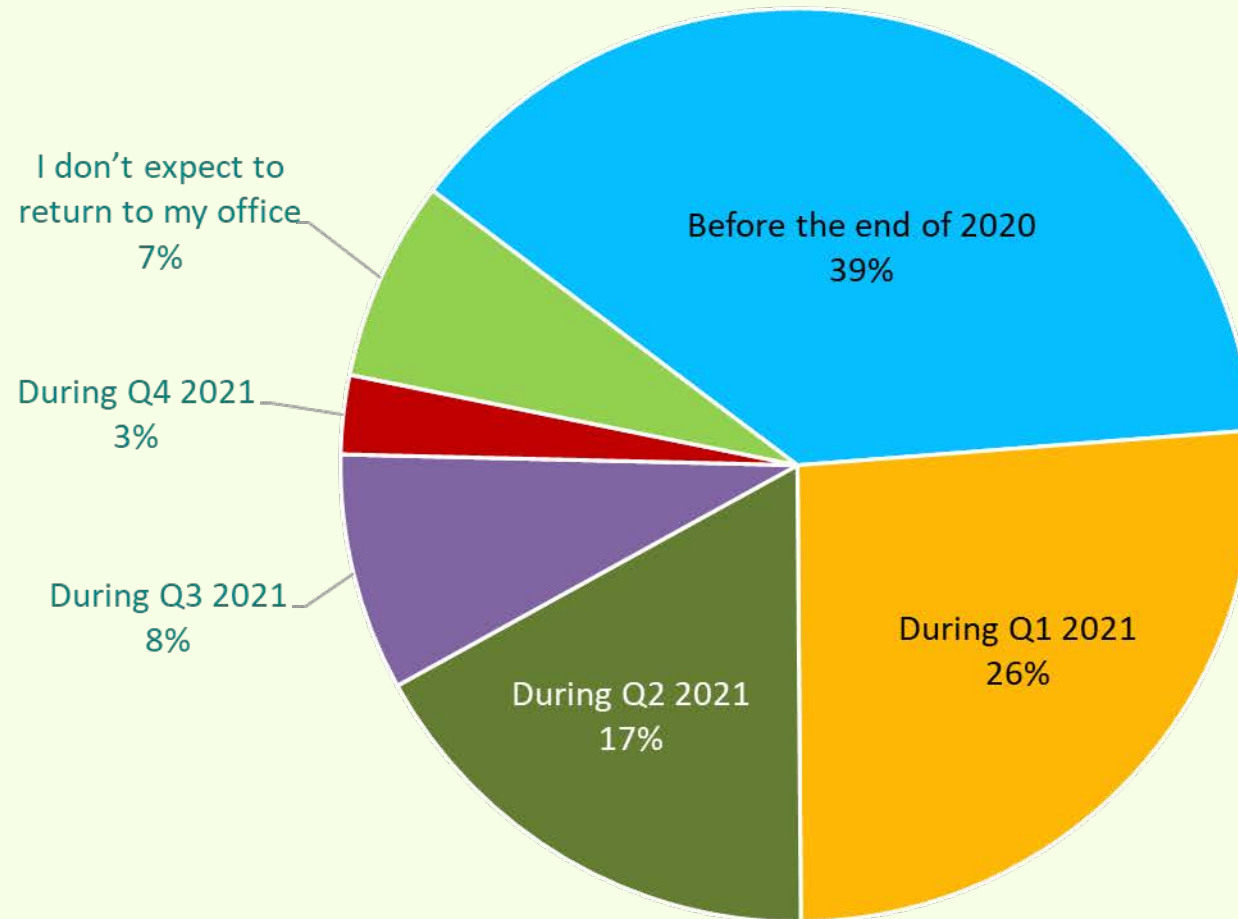
MOST WFH AT LEAST PART OF THE TIME

Are you presently working from home or in a dedicated workplace?



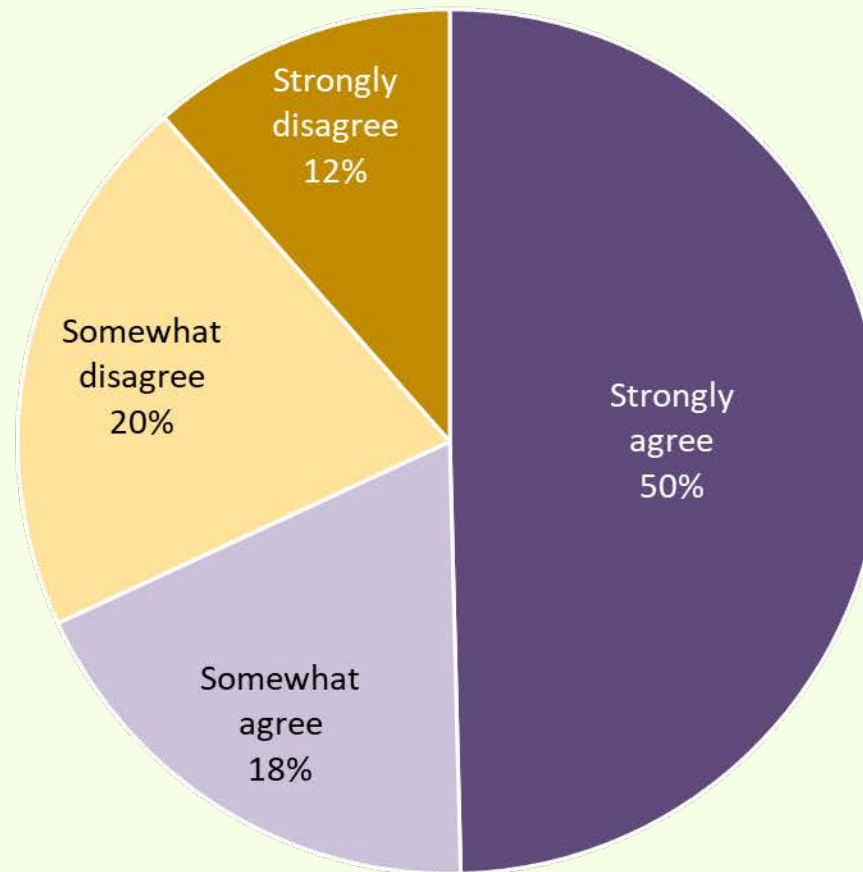
2/3 EXPECT TO BE BACK AT OFFICE BEFORE APRIL 1, 2021

Practically speaking, when do you expect to shift from primarily working from home to working from your office?



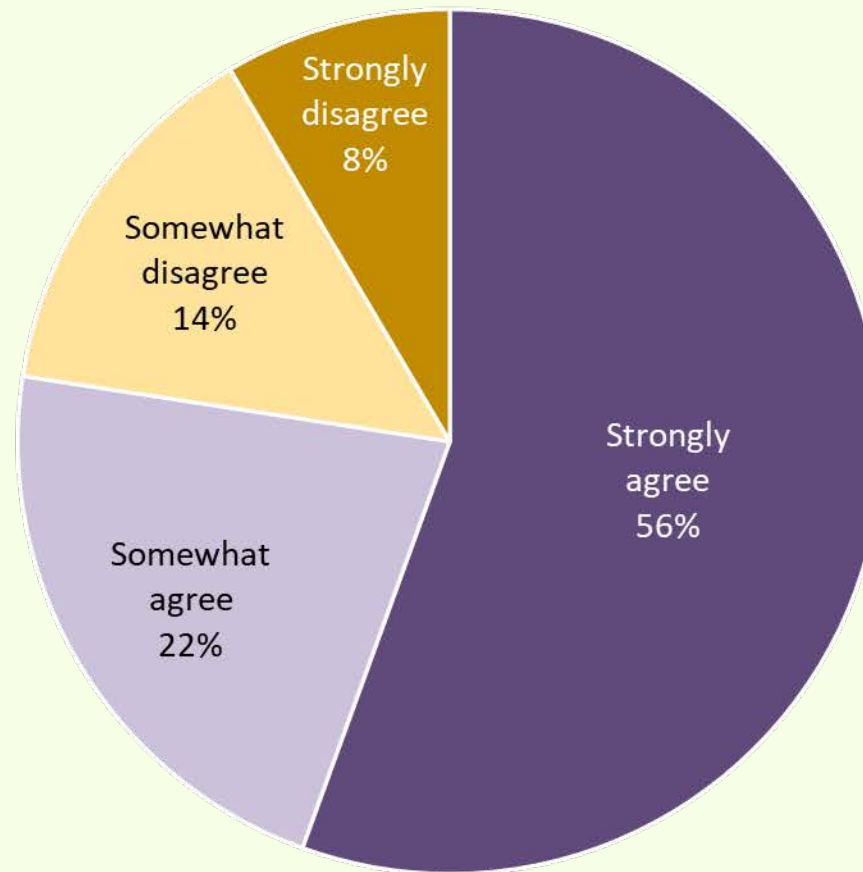
WFH HAS PROVEN TO BE A BOOST TO PRODUCTIVITY

Since I began working from home, my productivity has improved.



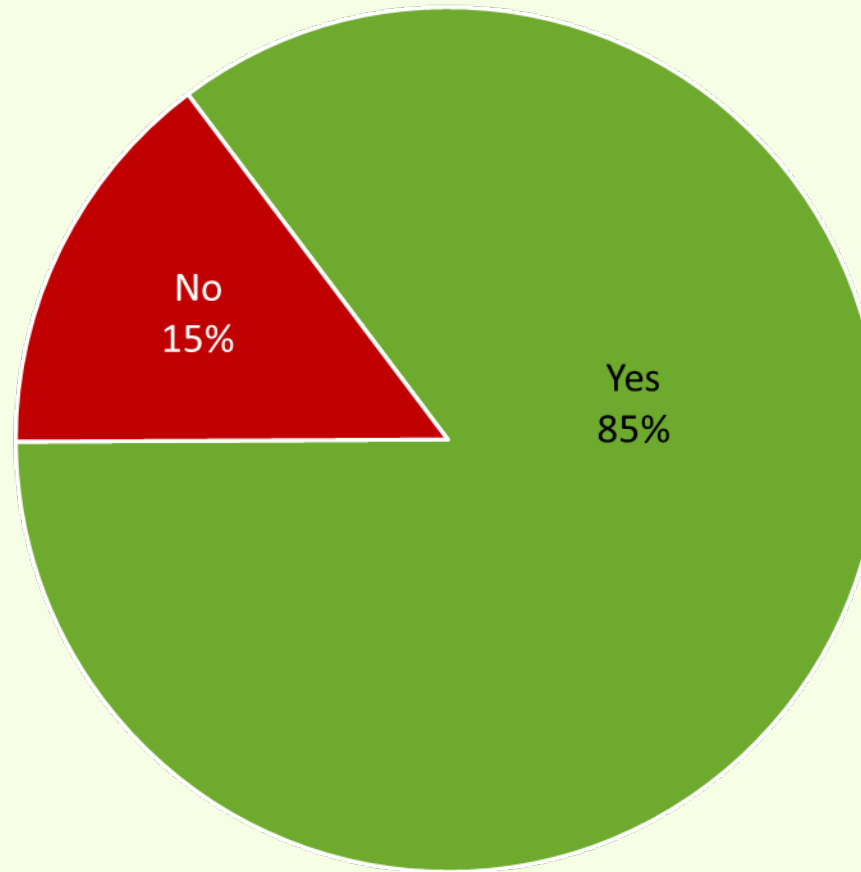
WFH HAS GIVEN THE GIFT OF MORE PERSONAL TIME

During the pandemic, I've had much more personal time in the course of a typical week than I did before.



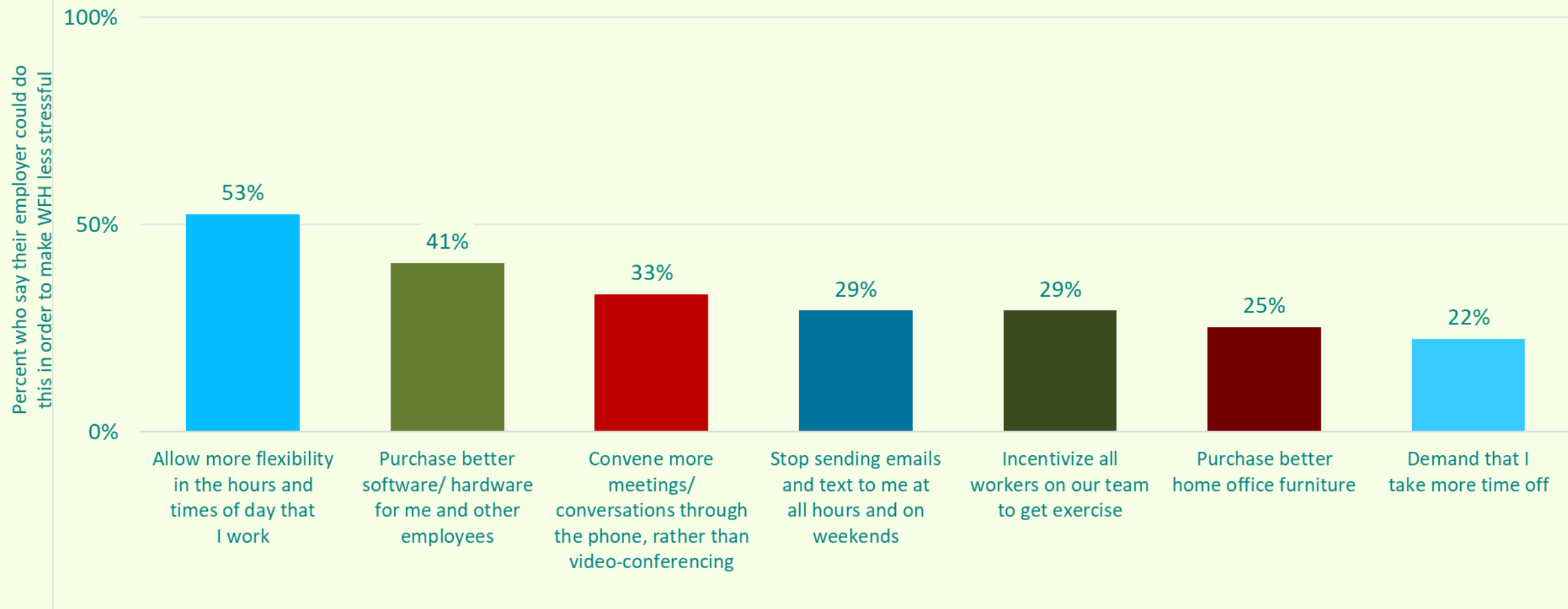
...BUT THERE IS LITTLE EXPECTATION THAT GIFT WILL CONTINUE

[Among those WFHers have enjoyed more personal time during the pandemic:] Once the pandemic ends, do you expect to return to your pre-pandemic amount of weekly personal time?



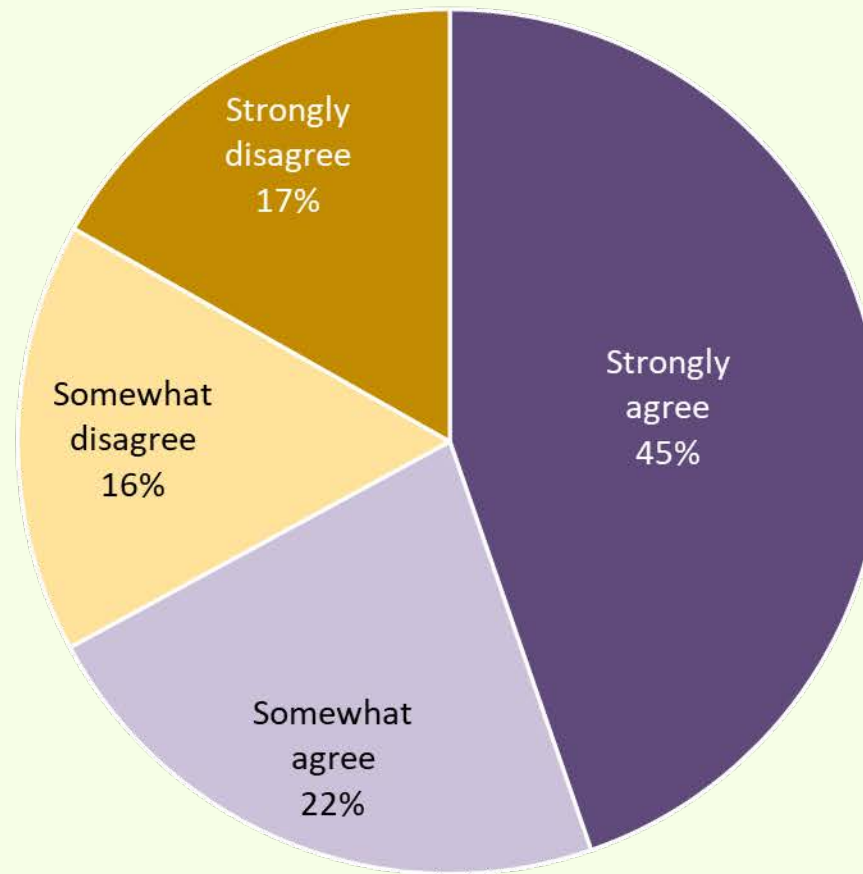
EMPLOYERS CAN MAKE WFH MUCH LESS STRESSFUL

Which of the following are things your employer could do to make working from home less stressful?
(Check all that apply)



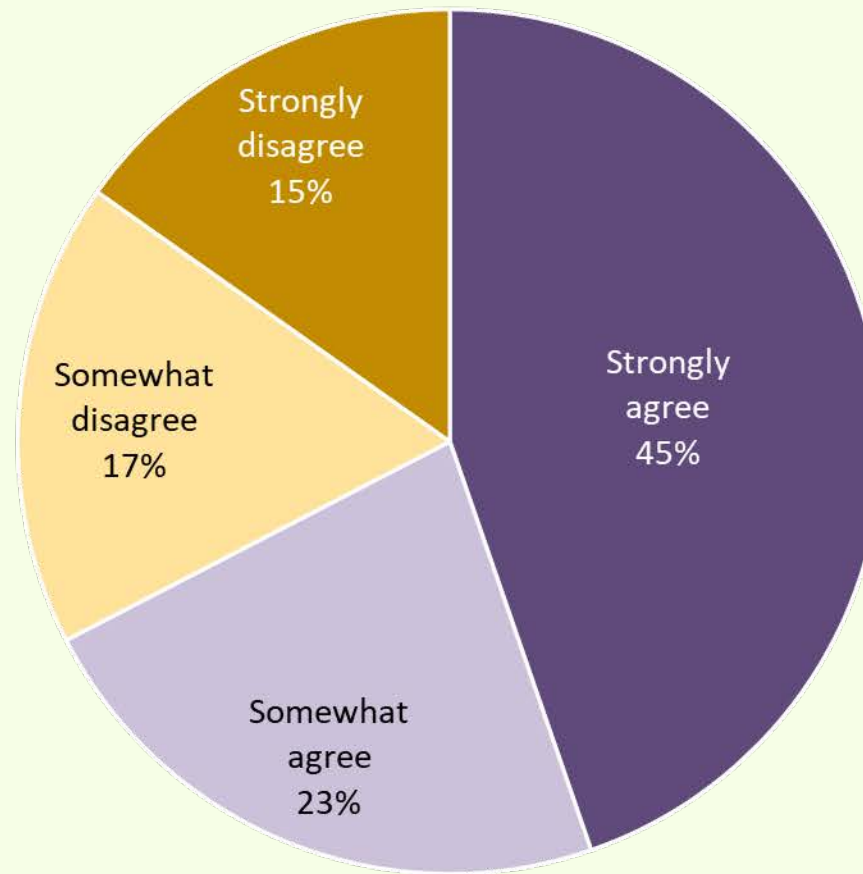
WFH TAKING A TOLL ON...A HEALTHY CORPORATE CULTURE

It is difficult to maintain a healthy corporate culture without workers occupying the same physical space.



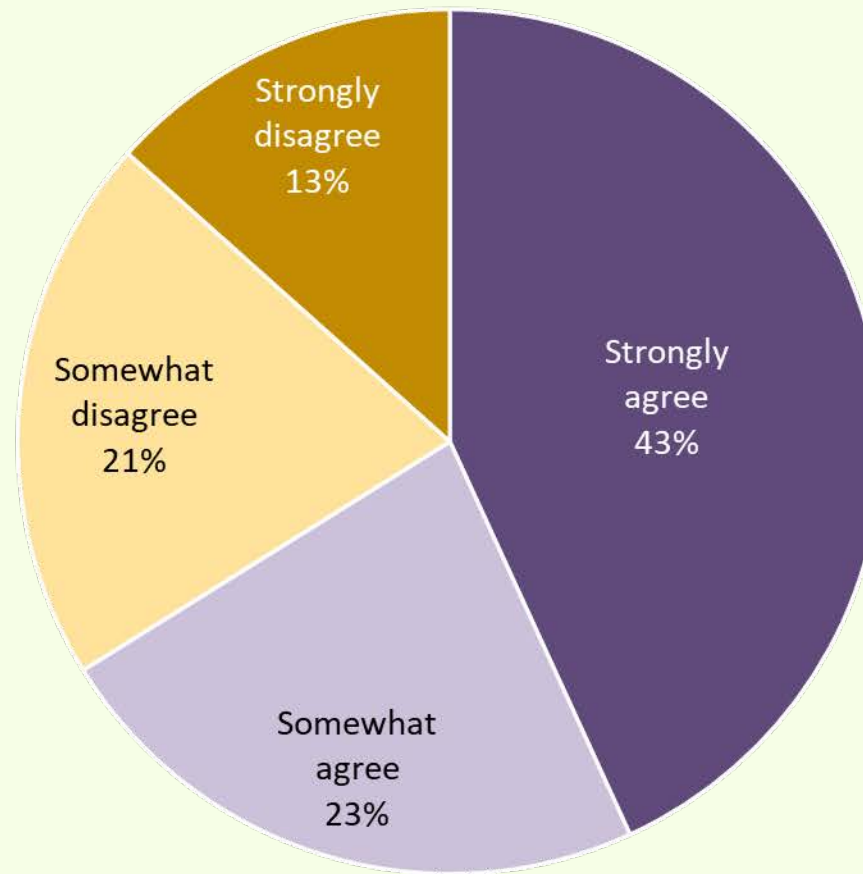
WFH TAKING A TOLL ON...EMPLOYEE CAMARADERIE

It is difficult to maintain camaraderie among employees in an organization without workers in the same physical space.



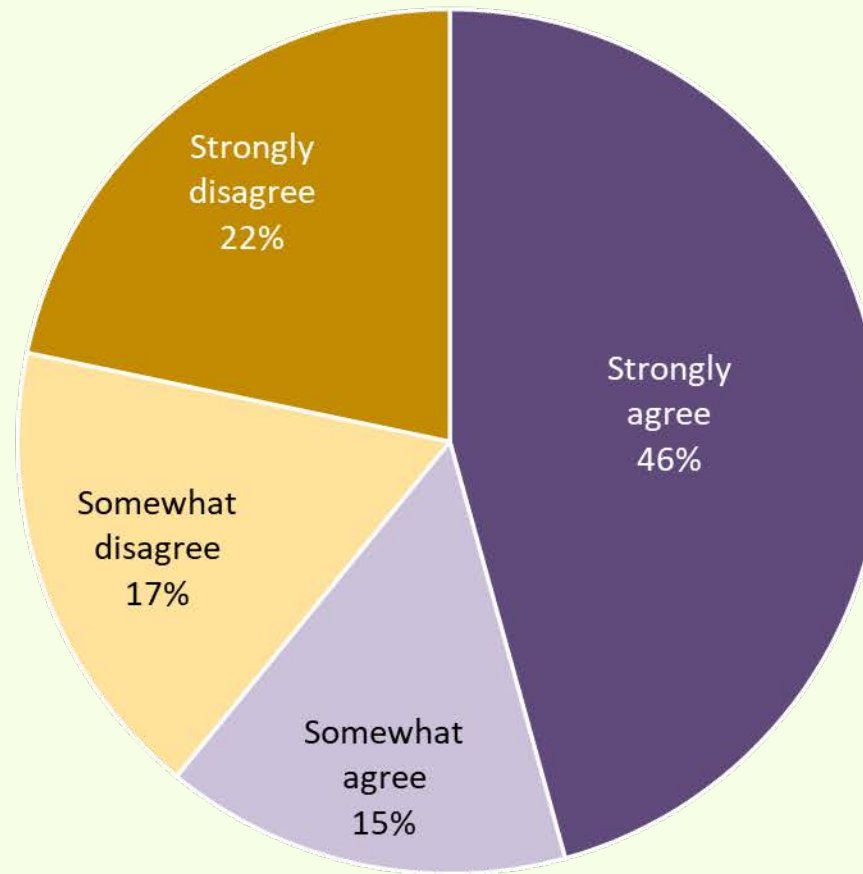
WFH TAKING A TOLL ON...THE CULTIVATION OF YOUNG TALENT

It is difficult to cultivate young talent within an organization without workers occupying the same physical space.



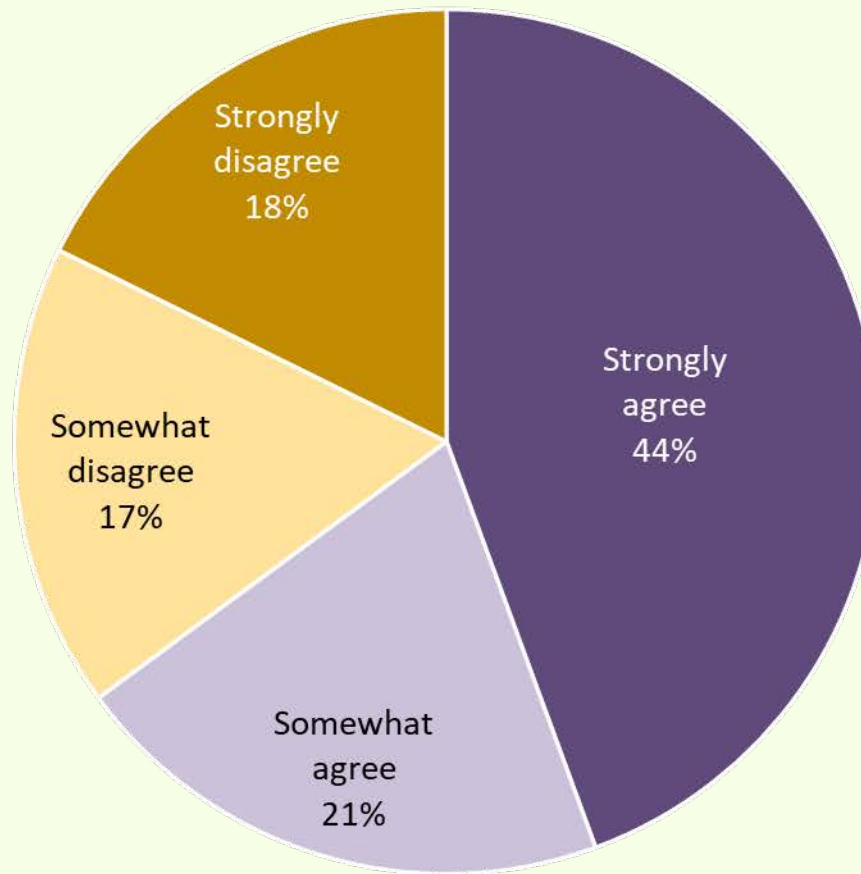
WFH WILL LIKELY TAKE A TOLL ON...COMMERCIAL REAL ESTATE

Once the pandemic ends, my company will occupy less physical space than it did before the pandemic.



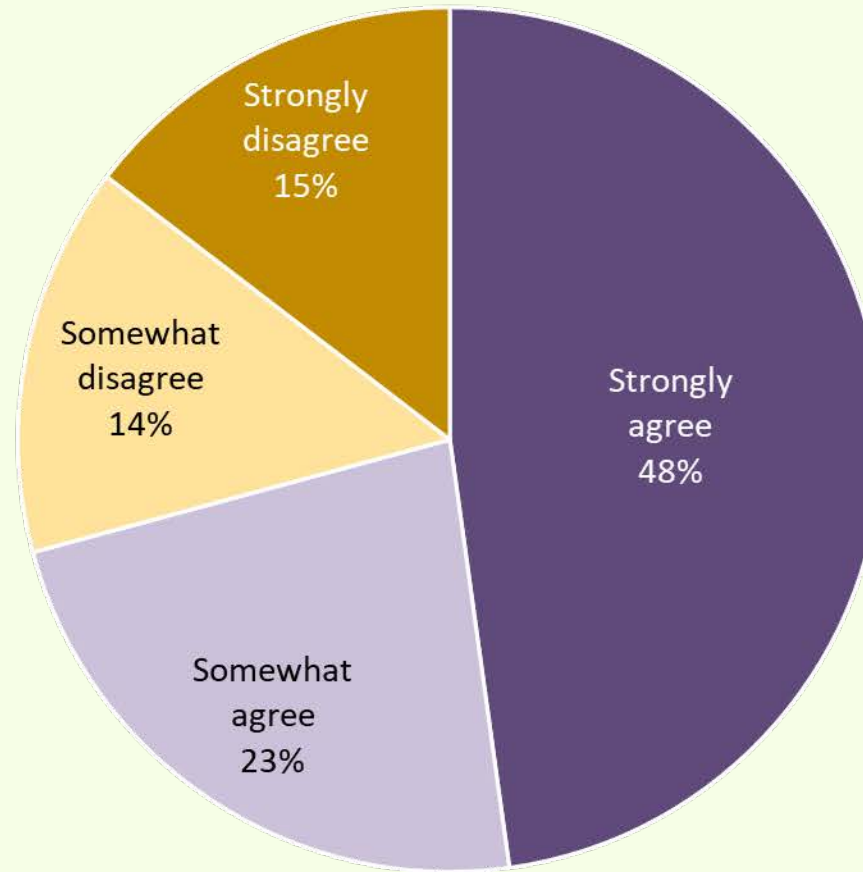
WFH WILL LIKELY TAKE A TOLL ON...A DEDICATED DESK AT WORK

Once the pandemic ends, those who come to the office will occupy work stations or offices used by different people on different days.



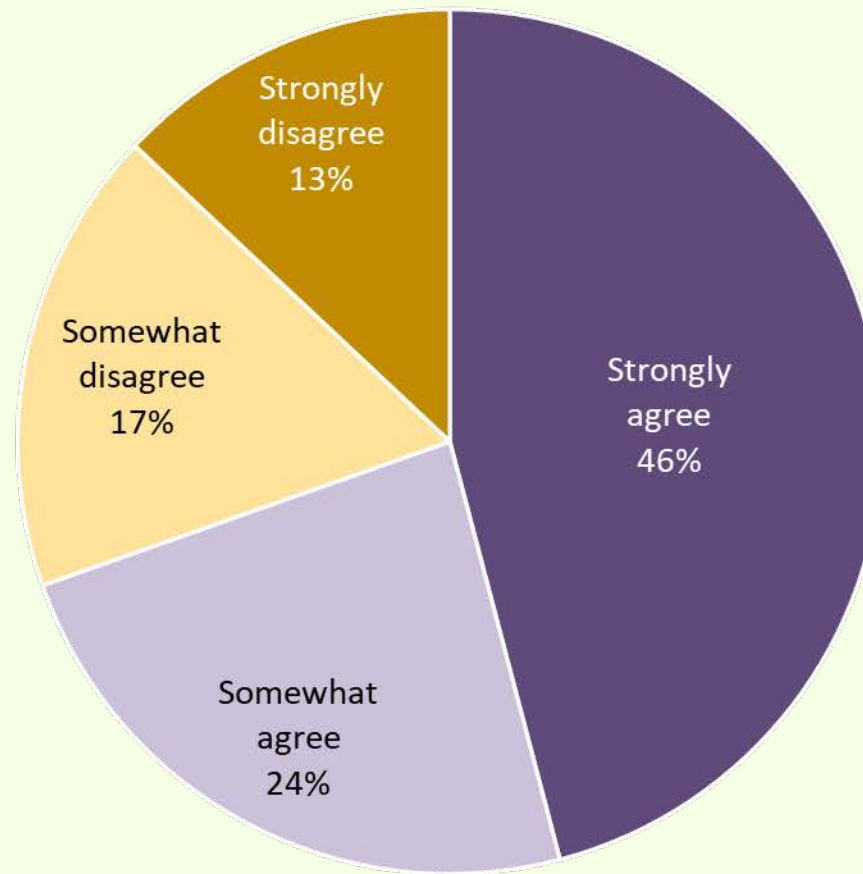
WFH WILL LIKELY TAKE A TOLL ON...EVERYONE'S BEING TOGETHER

Once the pandemic ends, at least some of my colleagues who didn't work from home beforehand will work from home at least part of the time.



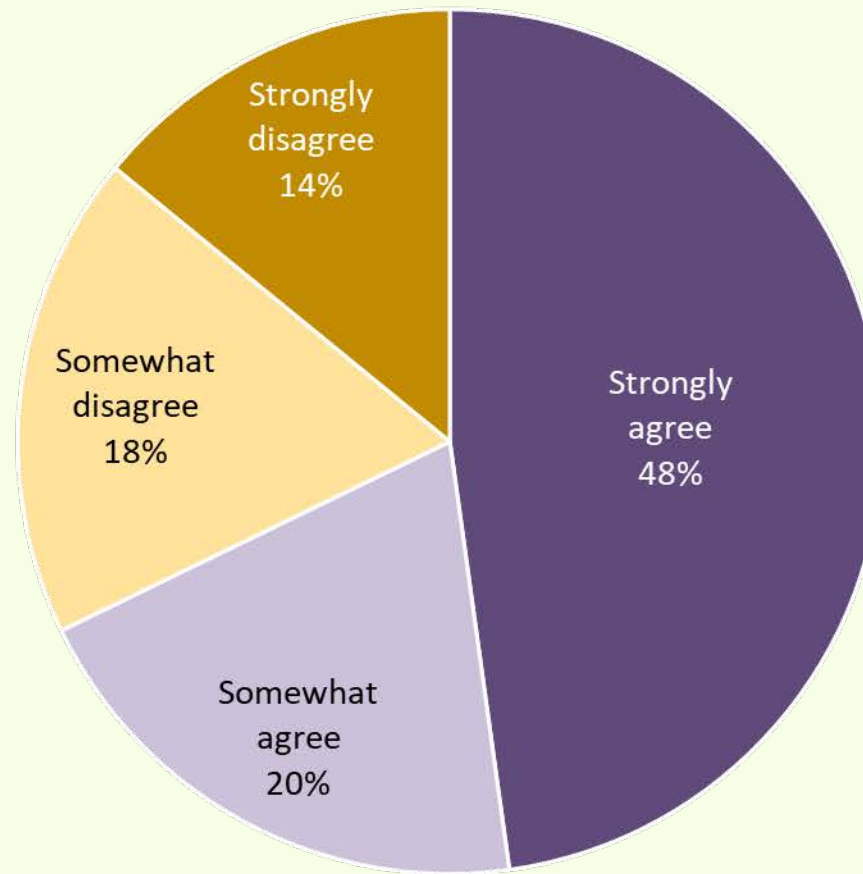
WFH WILL LIKELY TAKE A TOLL ON...TRADITIONAL RETIREMENT

The experience of working from home means I'm likelier to put off retirement when I reach that age.

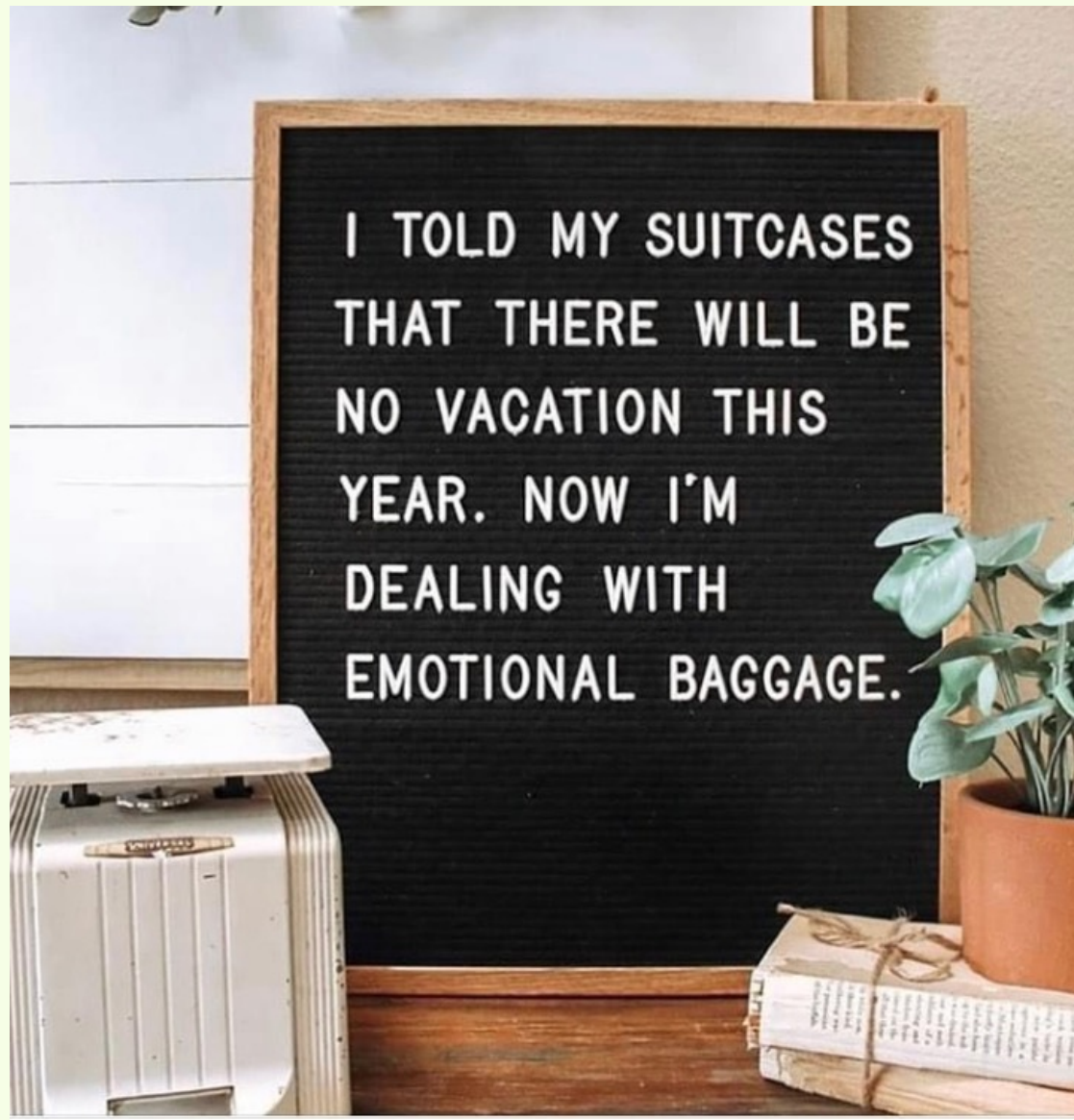


WFH WILL LIKELY TAKE A TOLL ON...EMPLOYEE/EMPLOYER RELATIONS

As long as I am working from home, my employer should cover at least a portion of the expenses related to home cooling/heating, electricity, internet, and phone.

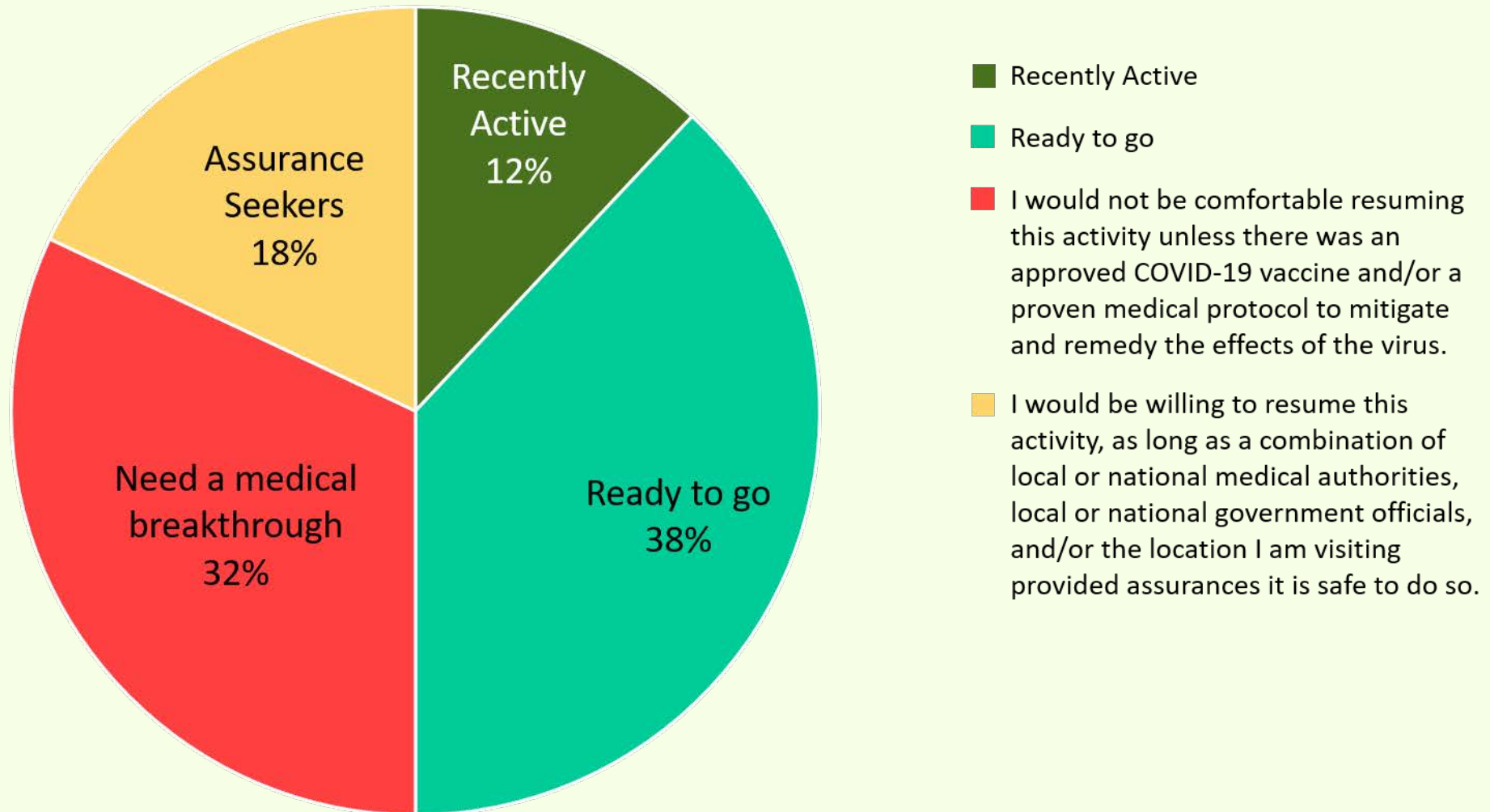


US Travel



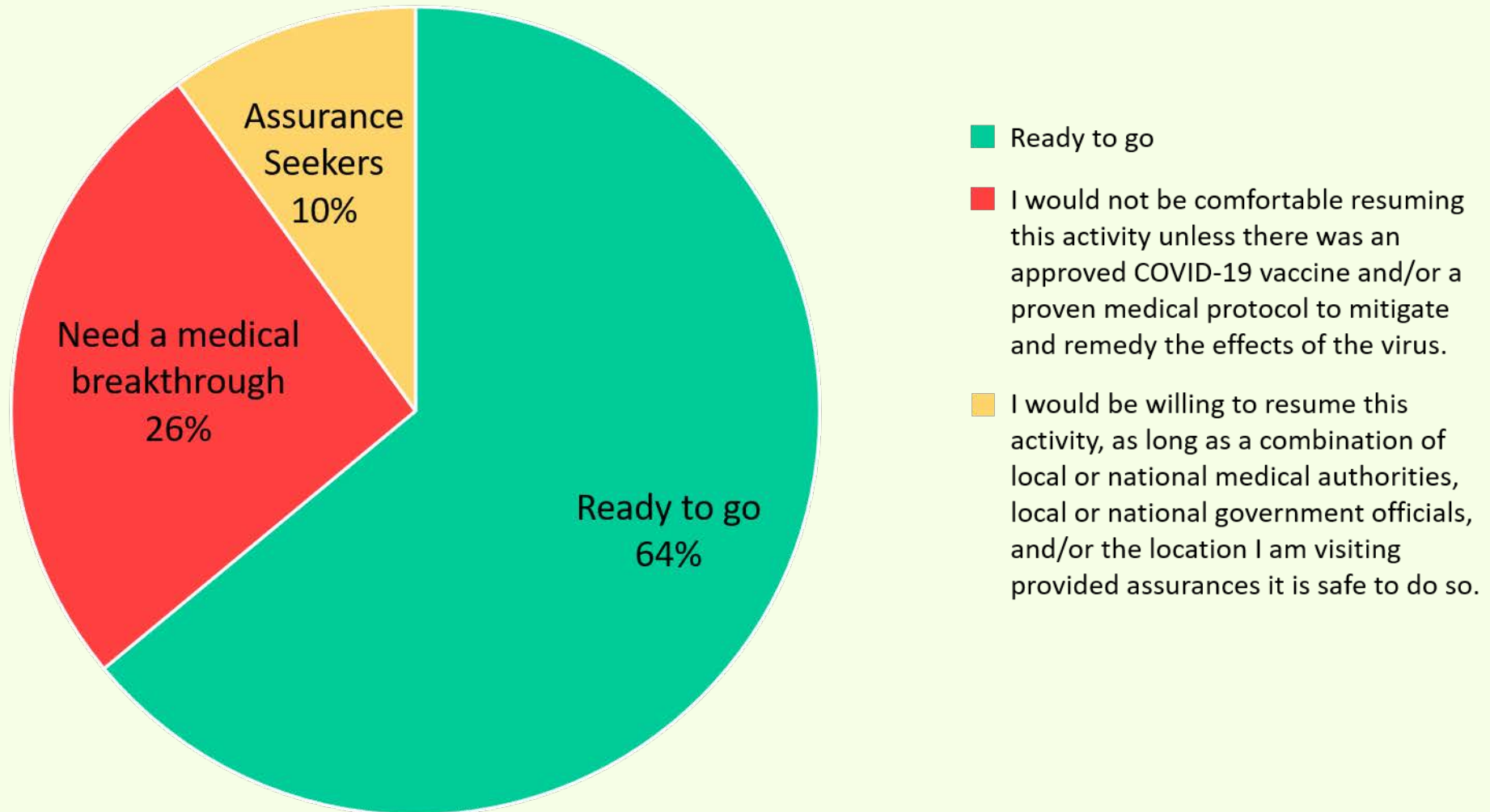
READY OR NOT: STAY AT A HOTEL OR RESORT

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



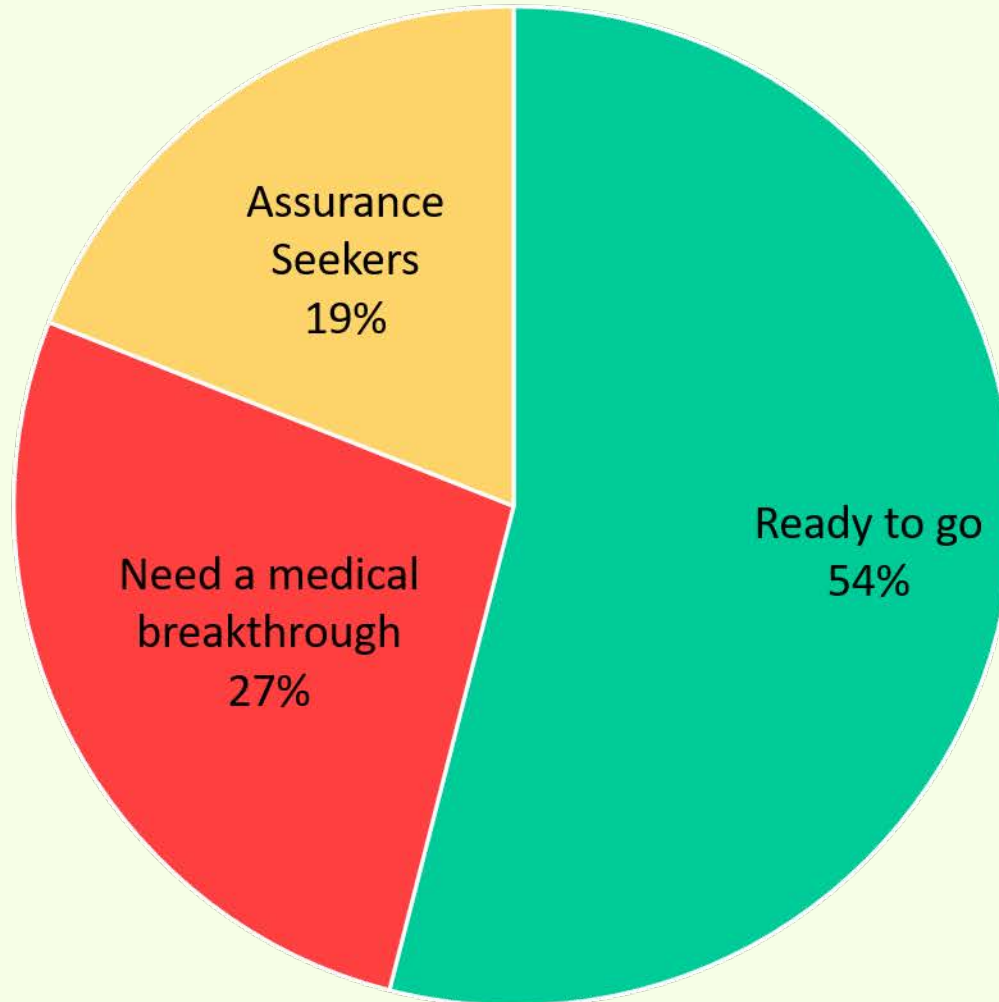
READY OR NOT: TAKE A CRUISE VACATION

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



READY OR NOT: VISIT A THEME PARK

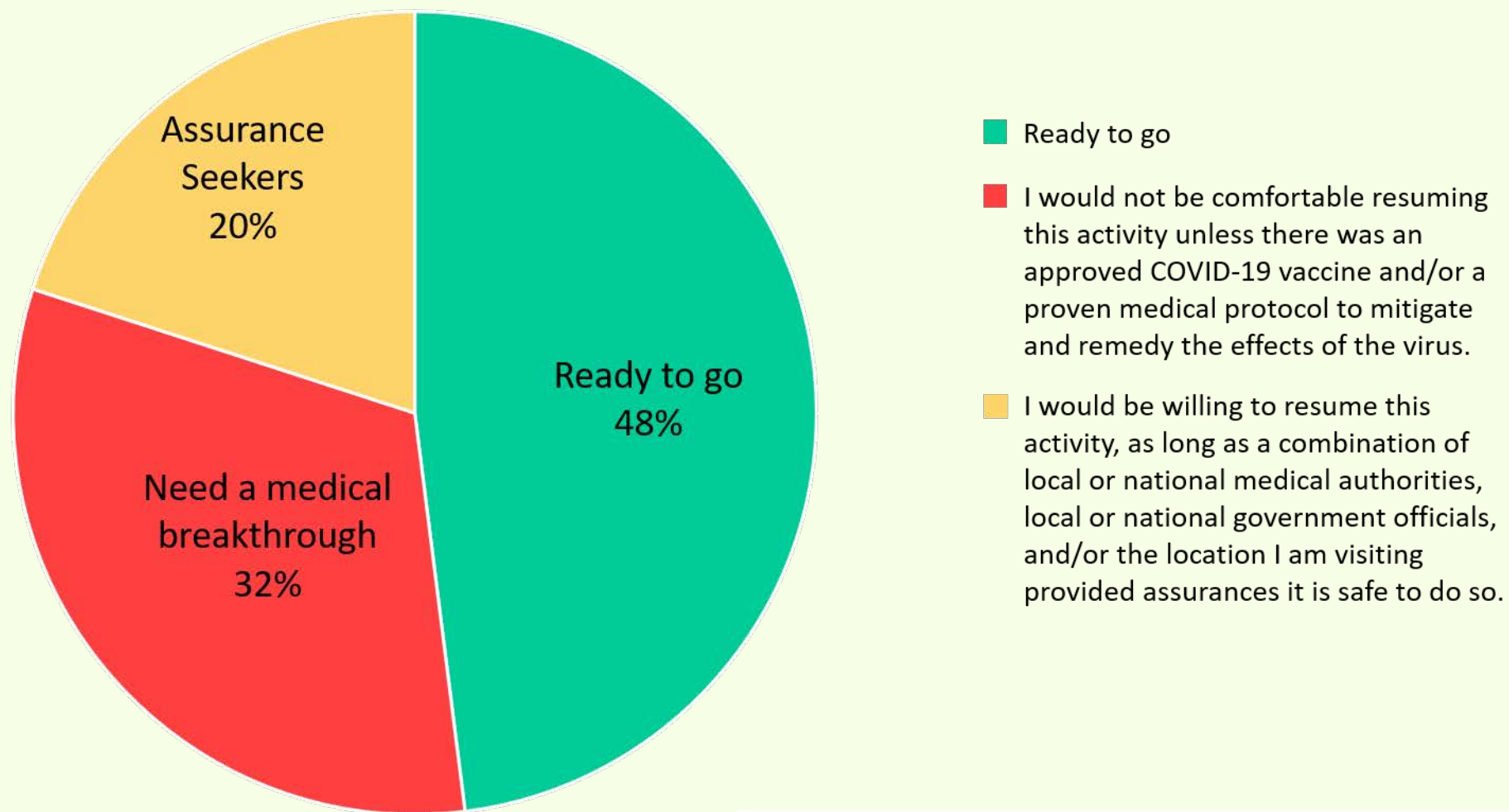
Which of the following conditions is closest to your current point of view... Visit a theme park



- 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.

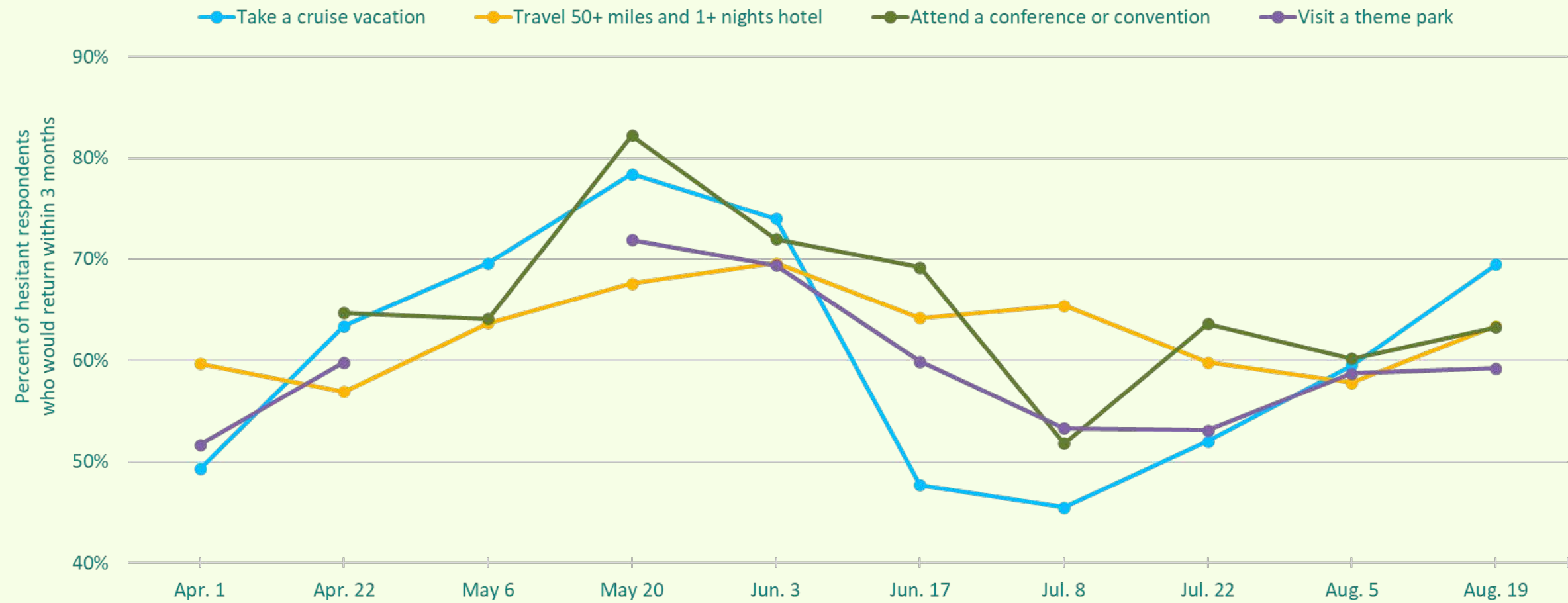
READY OR NOT: ATTEND A CONFERENCE OR CONVENTION

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



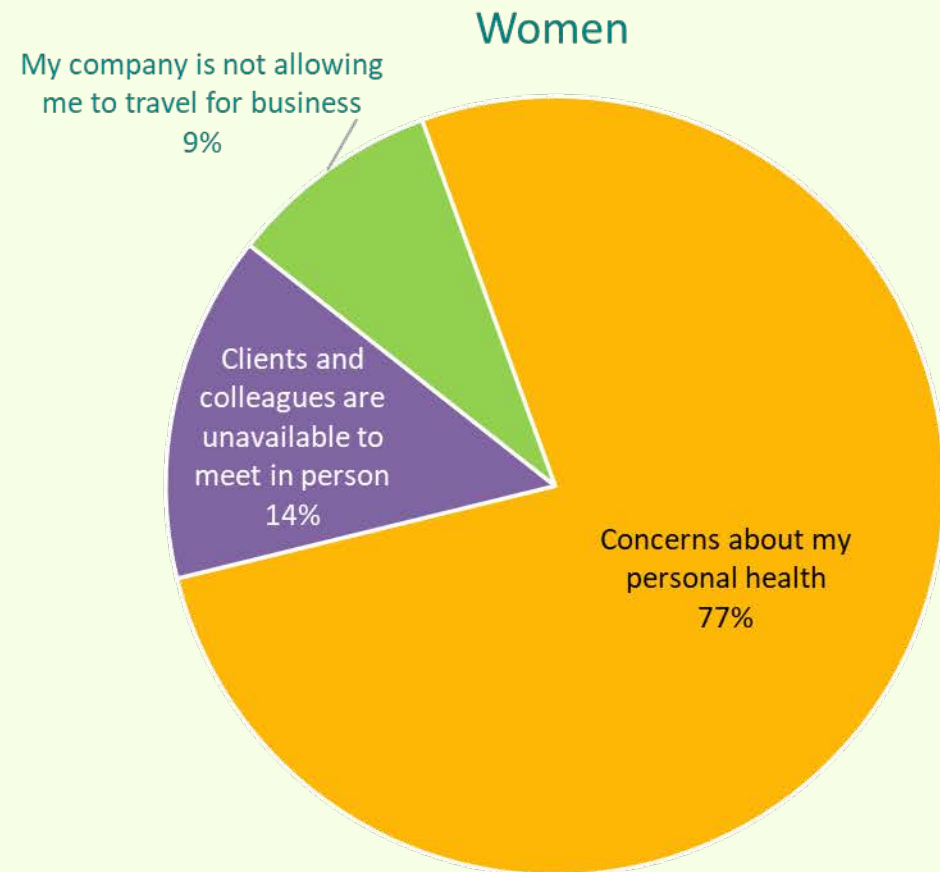
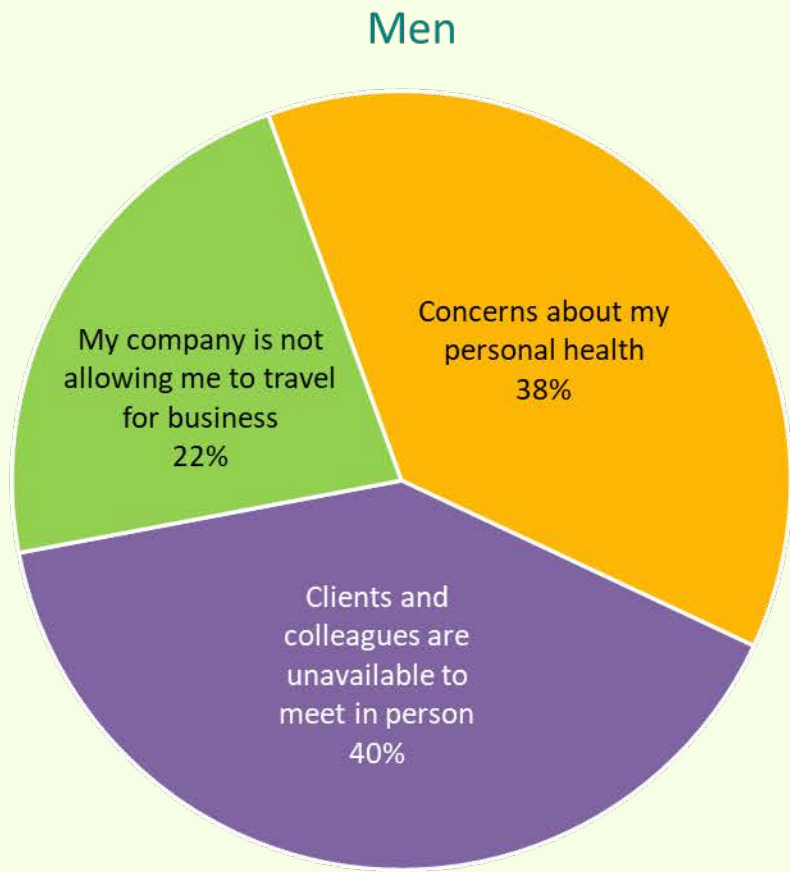
US TRAVEL: RETURN IN 3 MONTHS

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



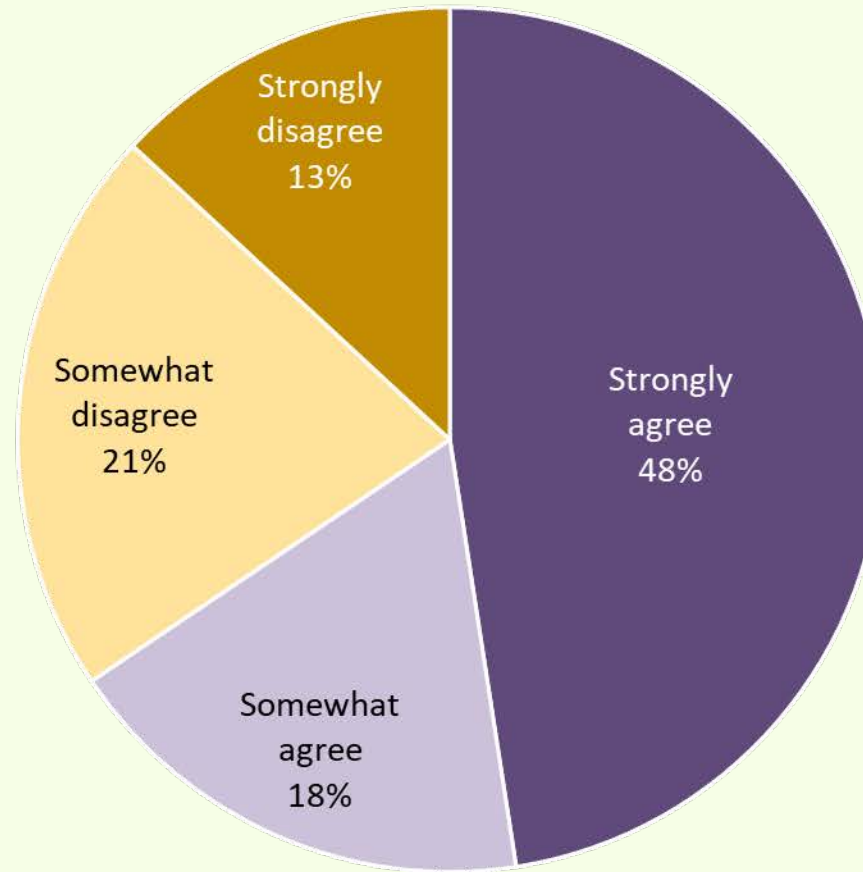
MALE/FEMALE BIZ TRAVELERS FACE DIFFERENT IMPEDIMENTS

Practically speaking, what is the biggest impediment to resuming your active business travel?



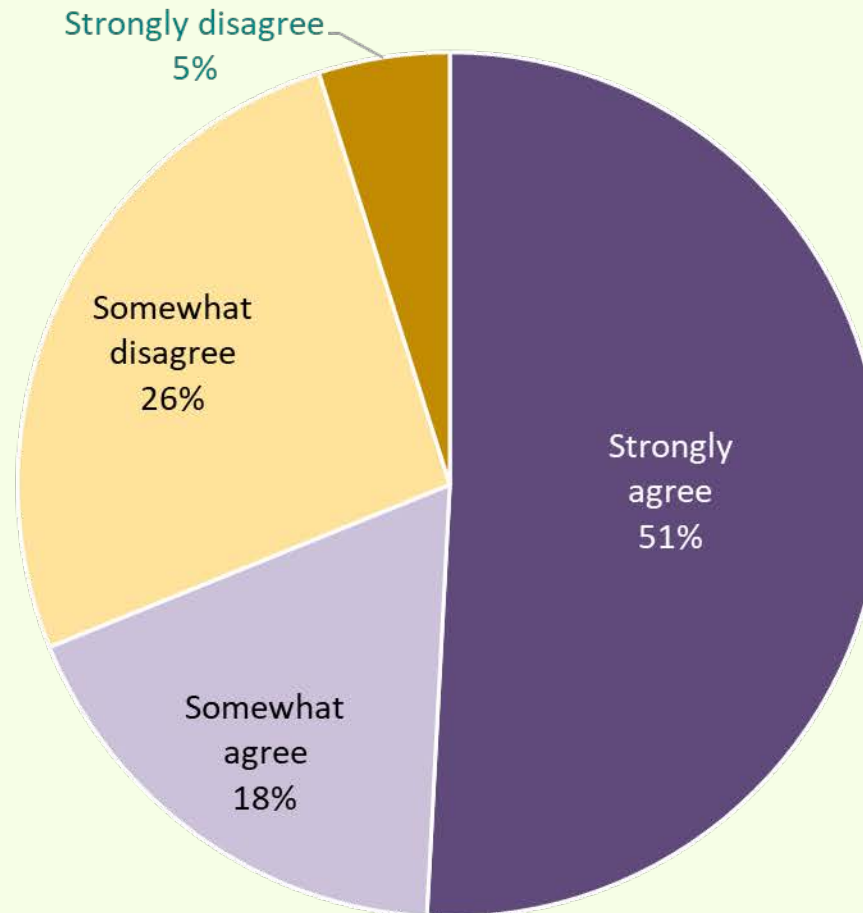
NOT BEING IN THE OFFICE MEANS NOT BEING ON THE ROAD

[Among those working exclusively from home or split between home and their dedicated workplace, AND having traveled for business in the past year:] As long as I am avoiding my office, I'm avoiding traveling for business.



CLIENTS' NOT BEING IN THE OFFICE MEANS NOT BEING ON THE ROAD

[Among those working exclusively from home or split between home and their dedicated workplace, AND having traveled for business in the past year:] As long as my clients and colleagues in other cities are avoiding their offices, I'm avoiding traveling for business.



IN-DEPTH INTERVIEWS: CHANGING IT UP A BIT

5 ROAD WARRIORS



5 HESITANT CONSUMERS



FREQUENT BUSINESS TRAVELERS' MINDSET

- NOTHING replaces a face-to-face interaction
 - Critical for building new relationships
 - Calls and web meetings reduces efficiency, collaboration, and a human element
 - “You can only (check in) and ask someone how they’re doing so many times.”
- They wish to get back out
 - They’re less organized without the travel routine – “It’s funny how you have more structure (travelling regularly)”
 - “I’m not one of those who could be stuck in the office from 9 to 5 every day.”
 - “It’s less exciting because I don’t get to go around the country and interact with my counterparts.”

TRAVEL SOLVES ONLY ONE ISSUE

- It will take some time (or a vaccine) to get back to the true effectiveness of face-to-face meetings

Calls and video
conferencing

COVID face-to-face

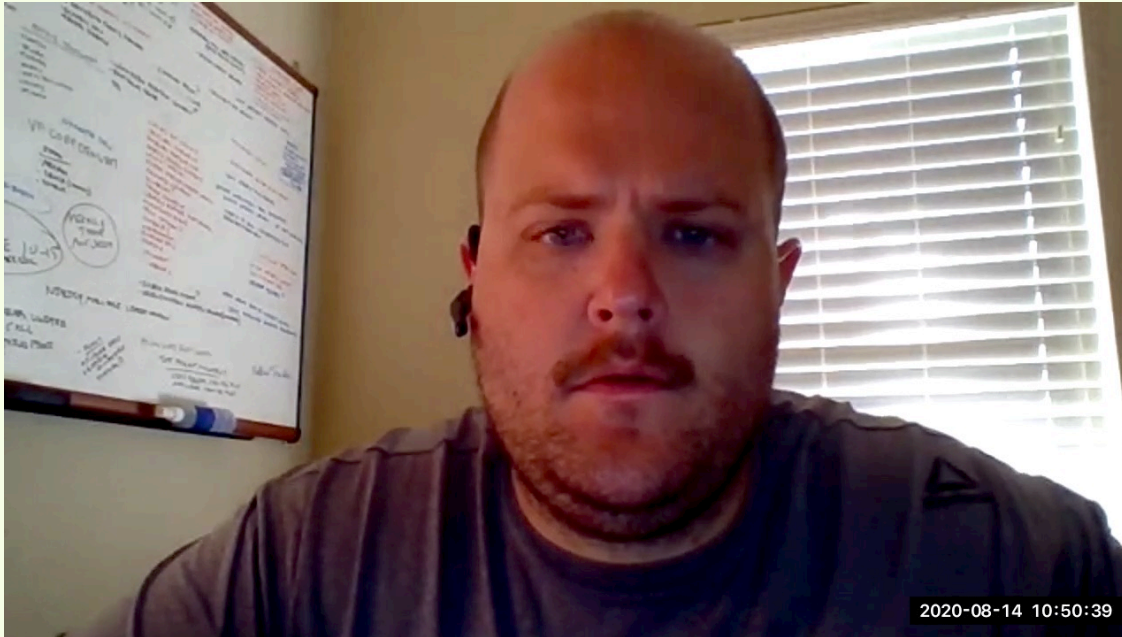
Traditional
face-to-face

Masks
Social distancing
No hand shaking
No meals together

BARRIERS TO BUSINESS TRAVEL

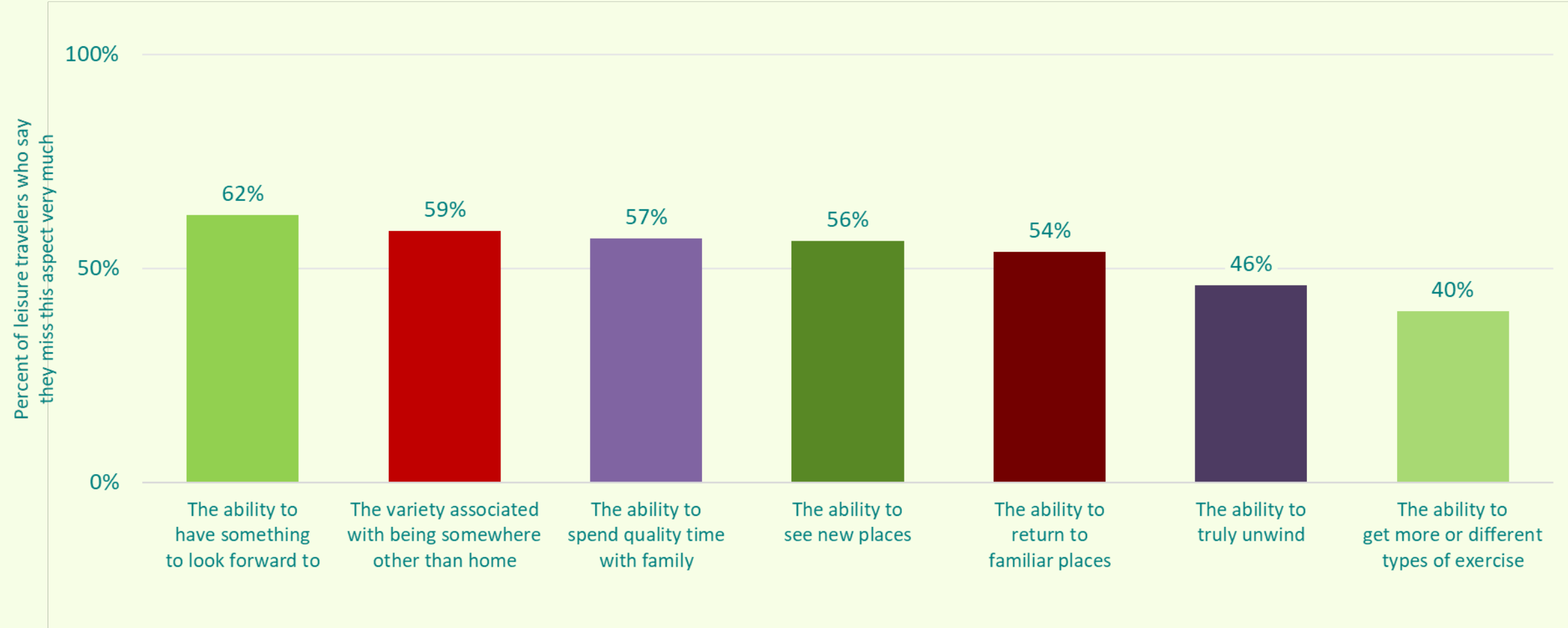
- Clients are working from home – awkward to find a place to meet
- Clients have policies against outside visitors (additional risks they bring to workplace)
- Clients too busy dealing with pandemic issues
- Quarantine requirements
- Concern about the destination
 - *“It’s not the act of travelling that is dissuading me - it’s how receptive the client will be, and how much bandwidth they have.”*

ROAD WARRIORS EXPLAIN IMPEDIMENTS TO BIZ TRAVEL



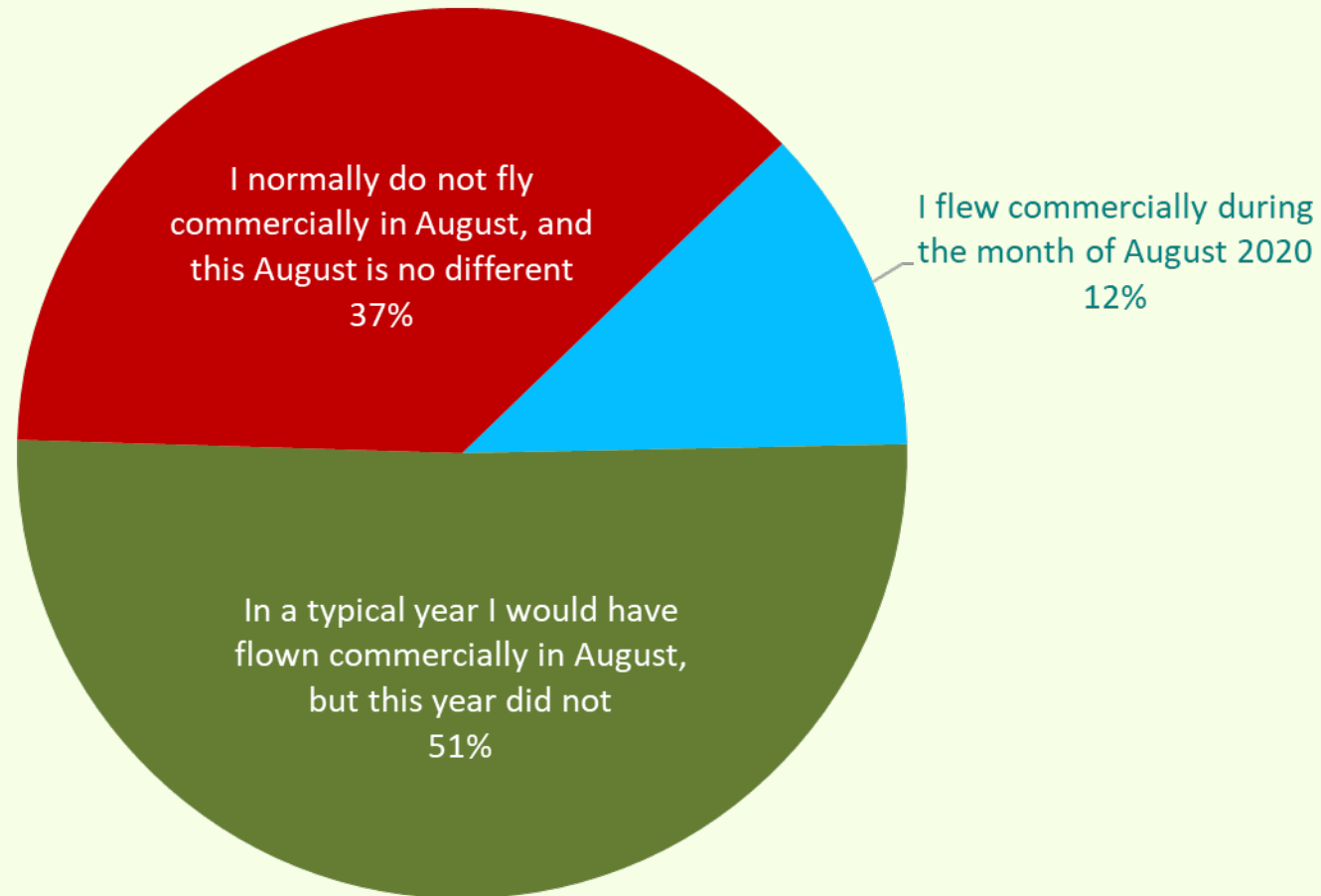
THERE ARE MANY THINGS LEISURE TRAVELERS ARE MISSING

How much, if at all, are you missing the following aspects of leisure travel?



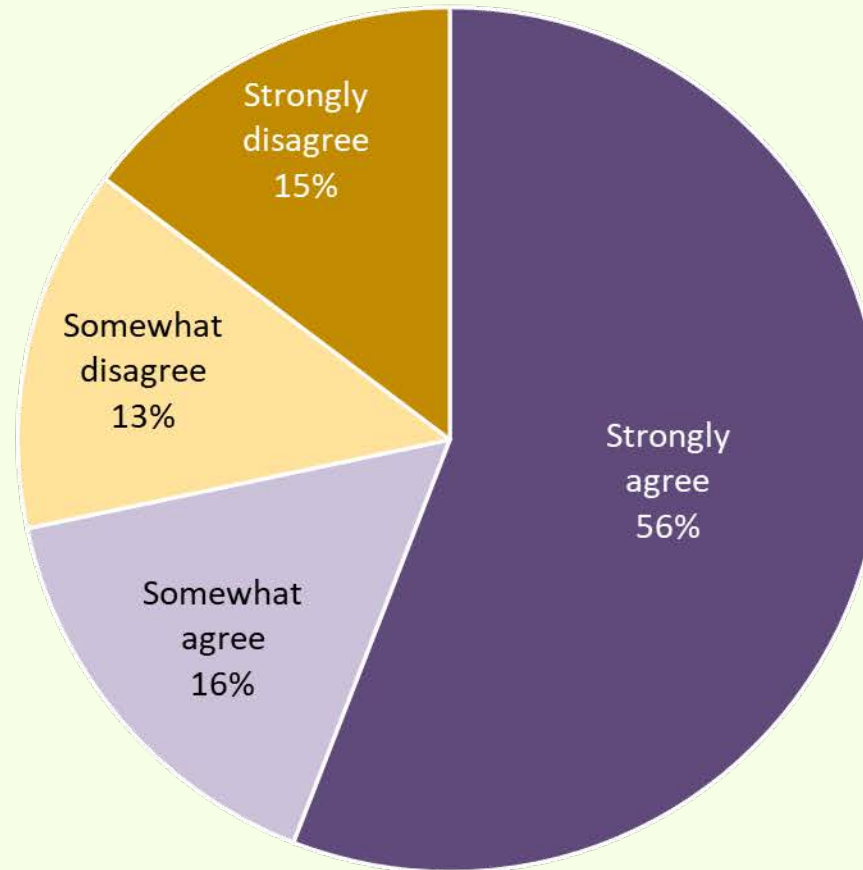
HALF SKIPPED THEIR TYPICAL FLYING IN AUGUST

When it comes to flying on a commercial airline during the month of August, what comes closest to your situation?



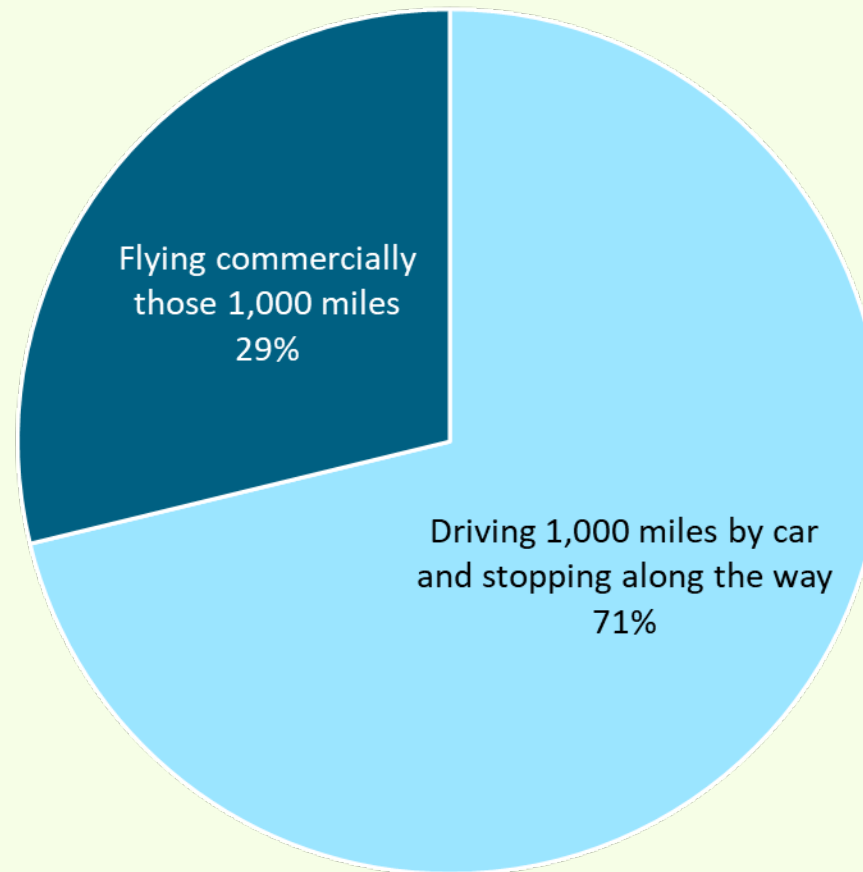
A MAJORITY ARE USING LESS VACATION TIME THIS YEAR

Compared to prior years, I'm using less of my vacation time in 2020.



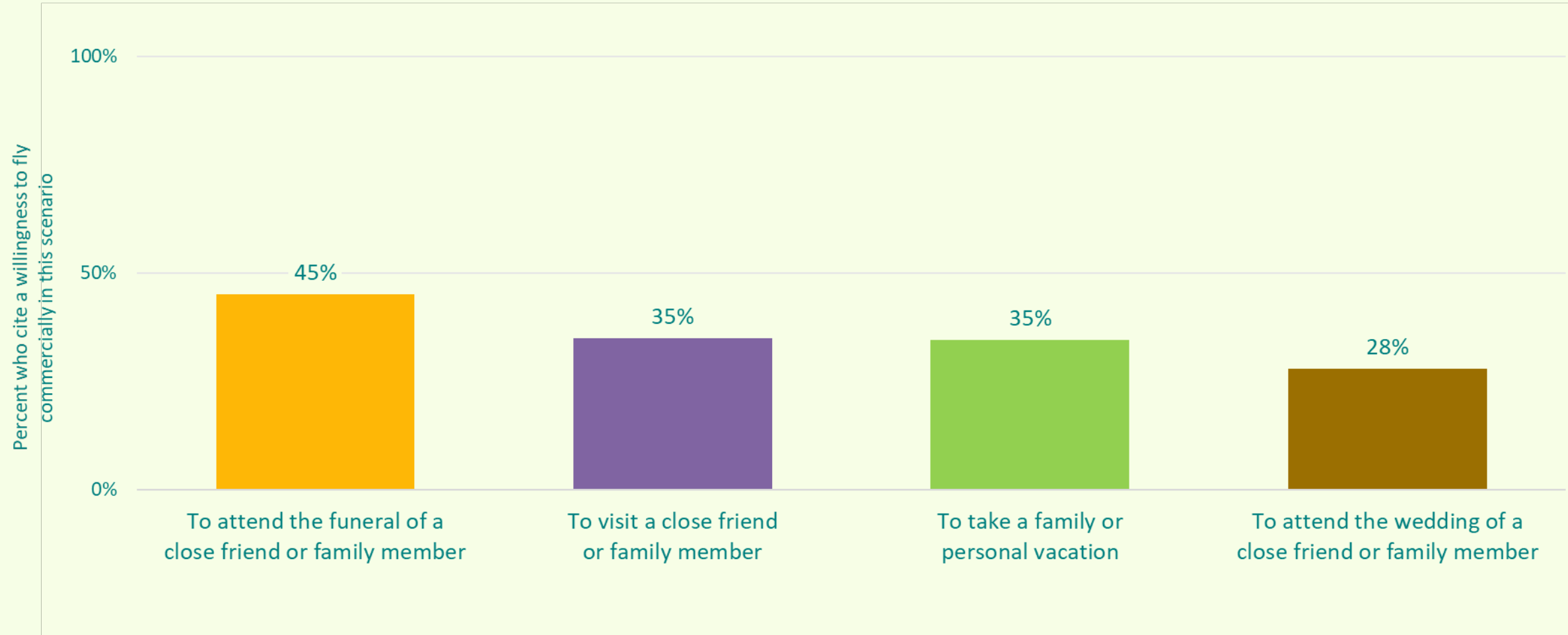
A JOURNEY OF 1,000 MILES IS VIEWED AS SAFER BY CAR

From a health perspective, what is safer during the pandemic?



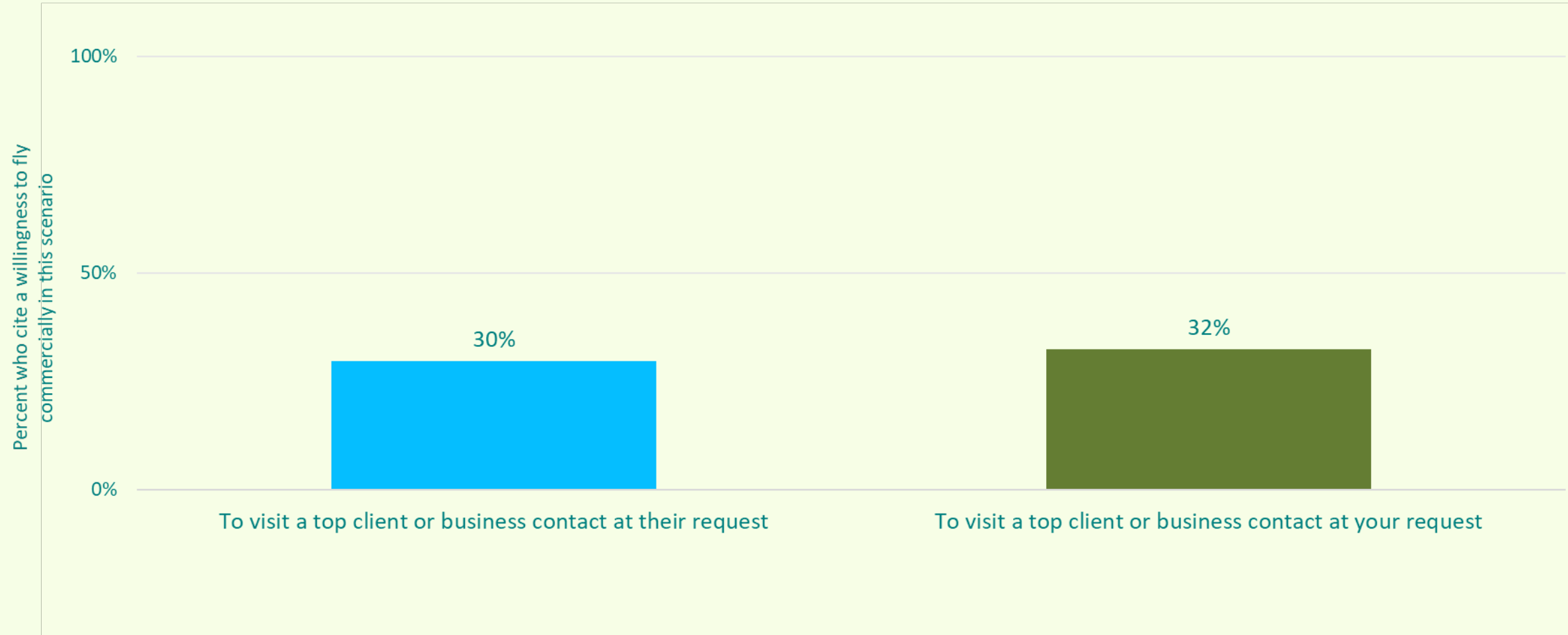
IT WOULD TAKE A FUNERAL TO GET PEOPLE TO FLY

Realistically speaking, under what scenarios would you be willing to fly commercially before there is a COVID-19 vaccine? (Check all that apply.)



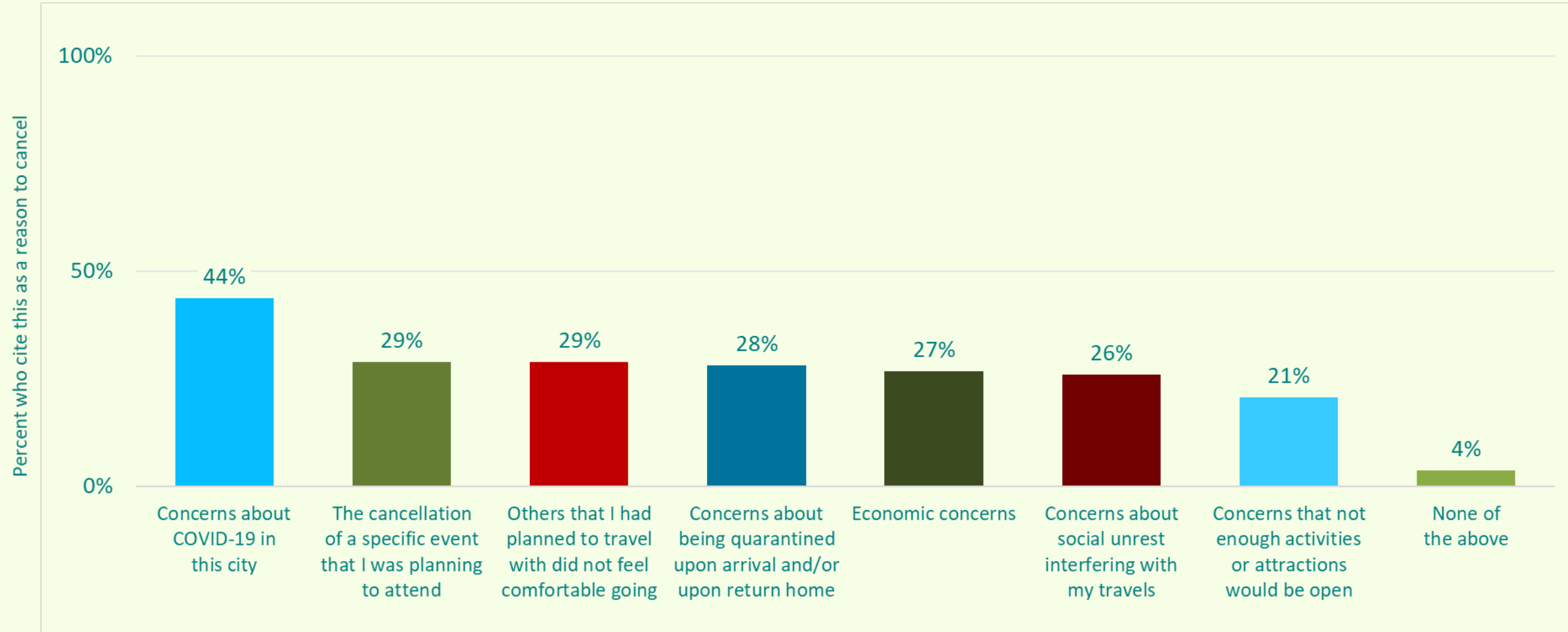
BUSINESS TRAVELERS WARY TO FLY BEFORE THERE'S A VACCINE

[Among business travelers:] Realistically speaking, under what scenarios would you be willing to fly commercially before there is a COVID-19 vaccine? (Check all that apply.)



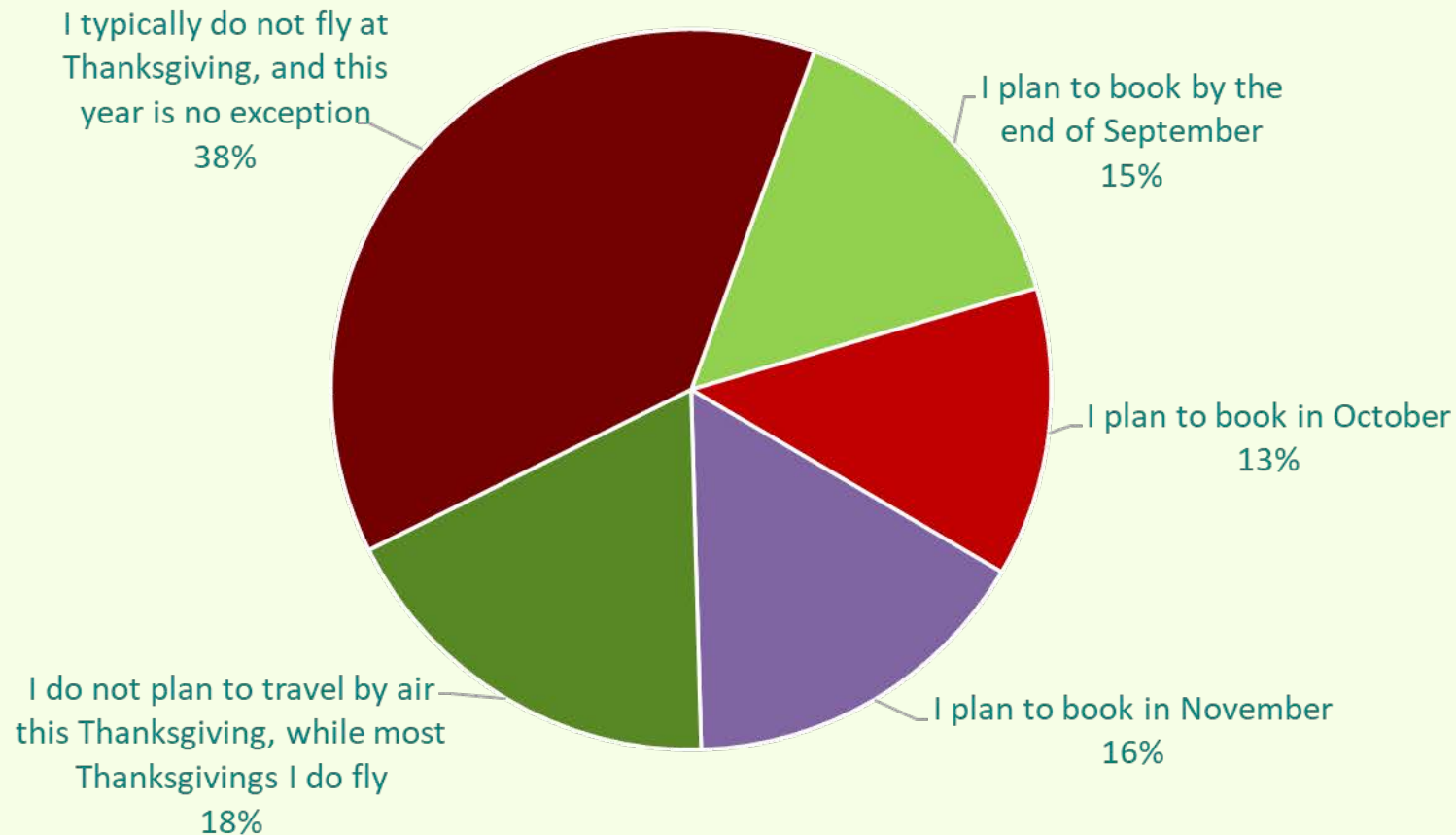
HERE'S WHY PEOPLE WHO CANCELLED DID SO

Please indicate which, if any, are reasons why you cancelled travel reservations during the pandemic.
(Choose all that apply)



SIZABLE MINORITY WILL SKIP FLYING THIS THANKSGIVING

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



WHAT THEY ARE HOPING FOR THIS HOLIDAY

- Optimistic that holidays will bring normalcy, family time, a good break (relax from stress)
 - “It will be a nice time to just be thankful for all of us still being here together.”
 - “A little bit of a relaxing time for all of my family. It’s been super stressful for all of them.”
 - “I didn’t see them for a couple of months (brother and parents) and they live so close...so being able to spend a holiday with them is going to be very, very nice.”
- But some worry that holidays will be different – no family gatherings, no traditional festivities in the city, no Black Friday shopping
 - “What I’m dreading the most is what are the holidays going to look like...It’s just scary and you don’t want that one event to be the thing where (family gets Covid)”

QUESTIONS

- What questions do you have about these findings?
- What do you want to ask in Wave 11?



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