

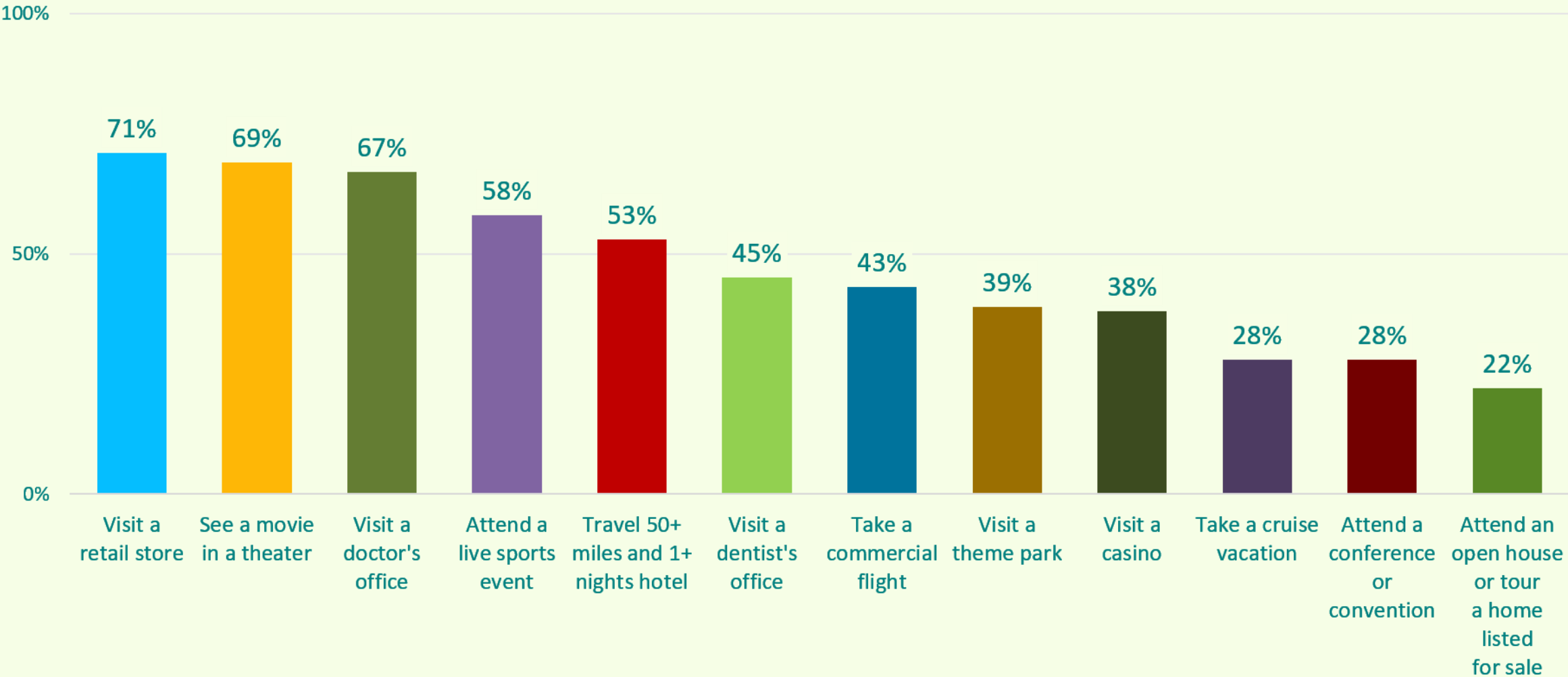
# **AMERICA PASSES AN INFLECTION POINT**

## **Key findings from the May 20, 2020 Back-to-Normal Barometer**

**RON BONJEAN, PARTNER, ROKK SOLUTIONS**  
**RICH THAU, PRESIDENT OF ENGAGIOUS**  
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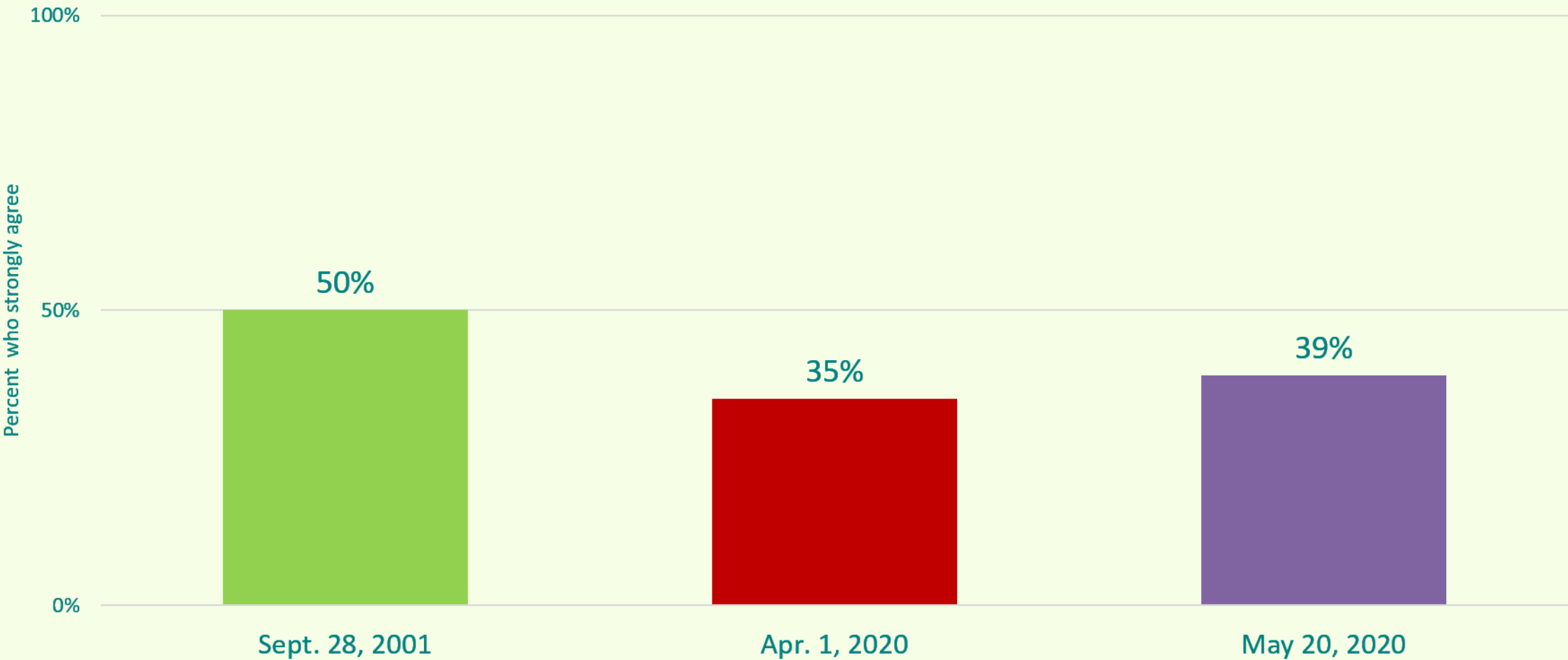
# CONTEXT: RESPONDENTS ACTIVELY ENGAGE

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



# STILL TOUGHER ON TRAVEL THAN AFTER 9/11

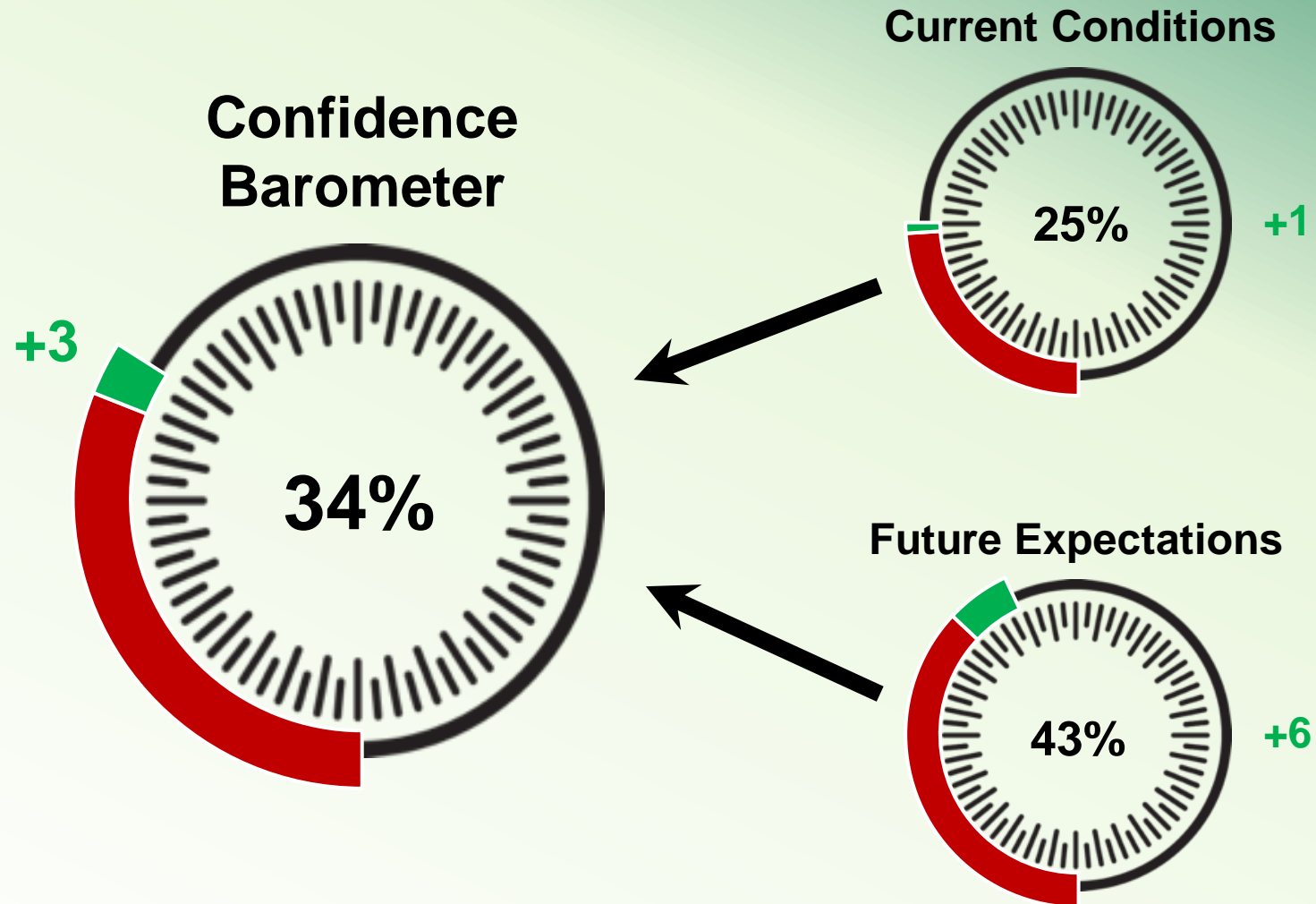
Taking a vacation of over 500 miles+ is a priority for me and my family in the next 12 months





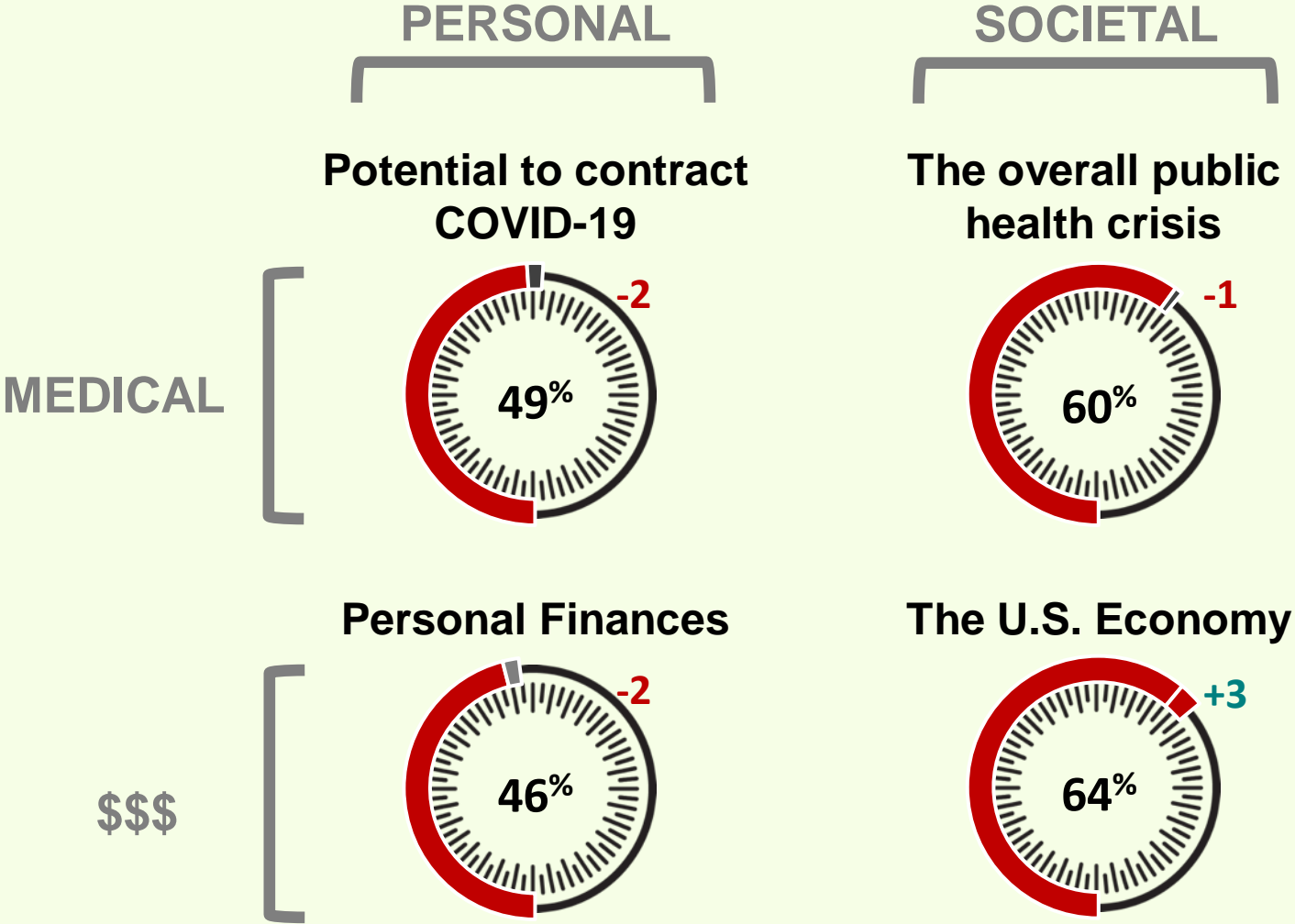
# WHERE WE STAND RIGHT NOW

# SLIGHT UPTICK IN CONFIDENCE IN WAVE 4





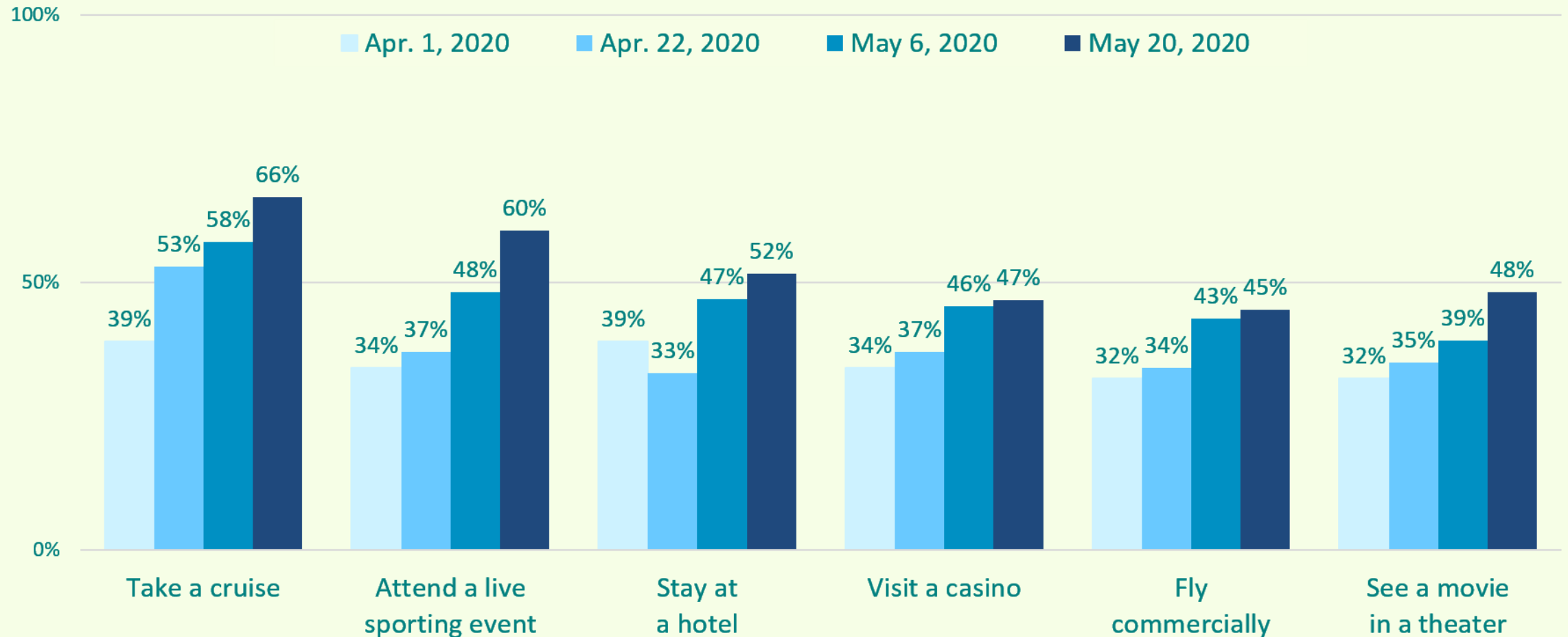
# WHAT ARE CONSUMERS MOST CONCERNED ABOUT?



\*Percentage who said they are extremely concerned  
Wave 3: n=547 Back to Normal Barometer – May 6, 2020  
Wave 4: n=593 Back to Normal Barometer – May 20, 2020

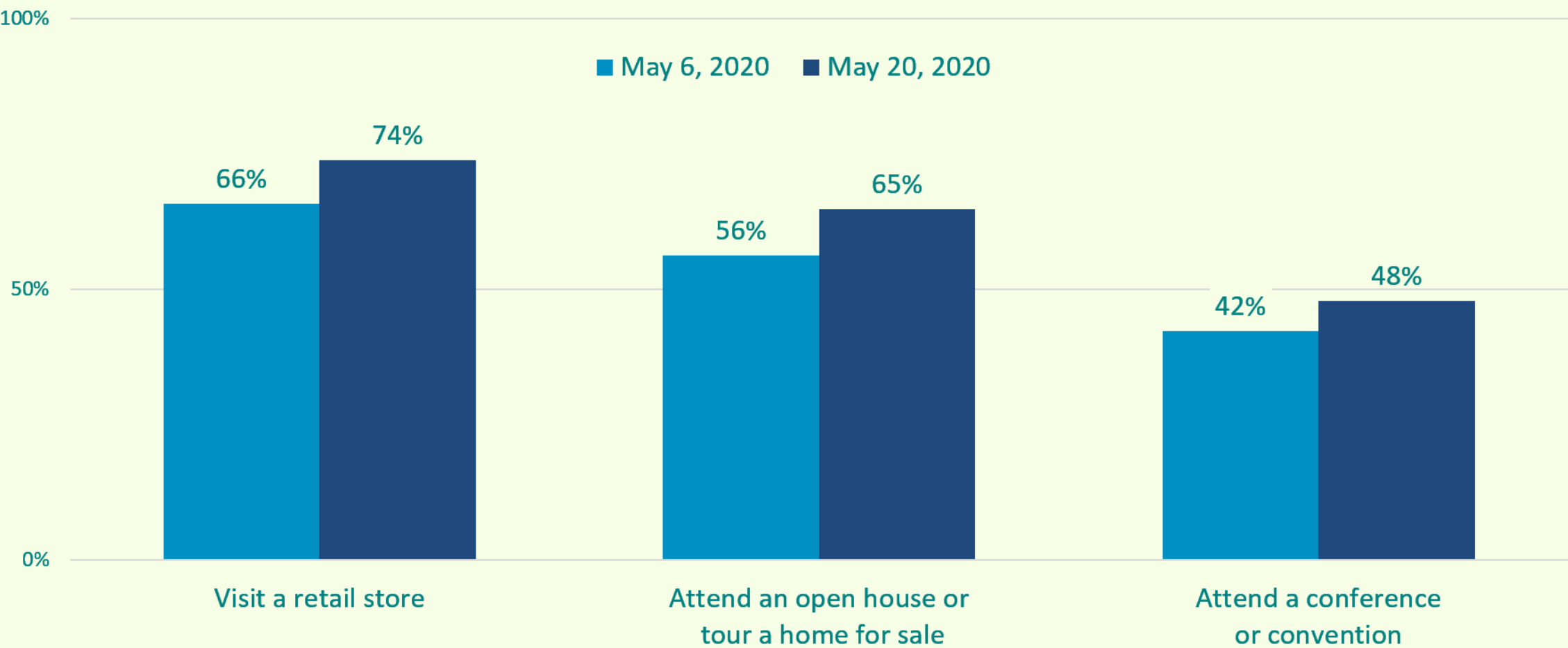
# SIZABLE % WOULD RETURN TOMORROW

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



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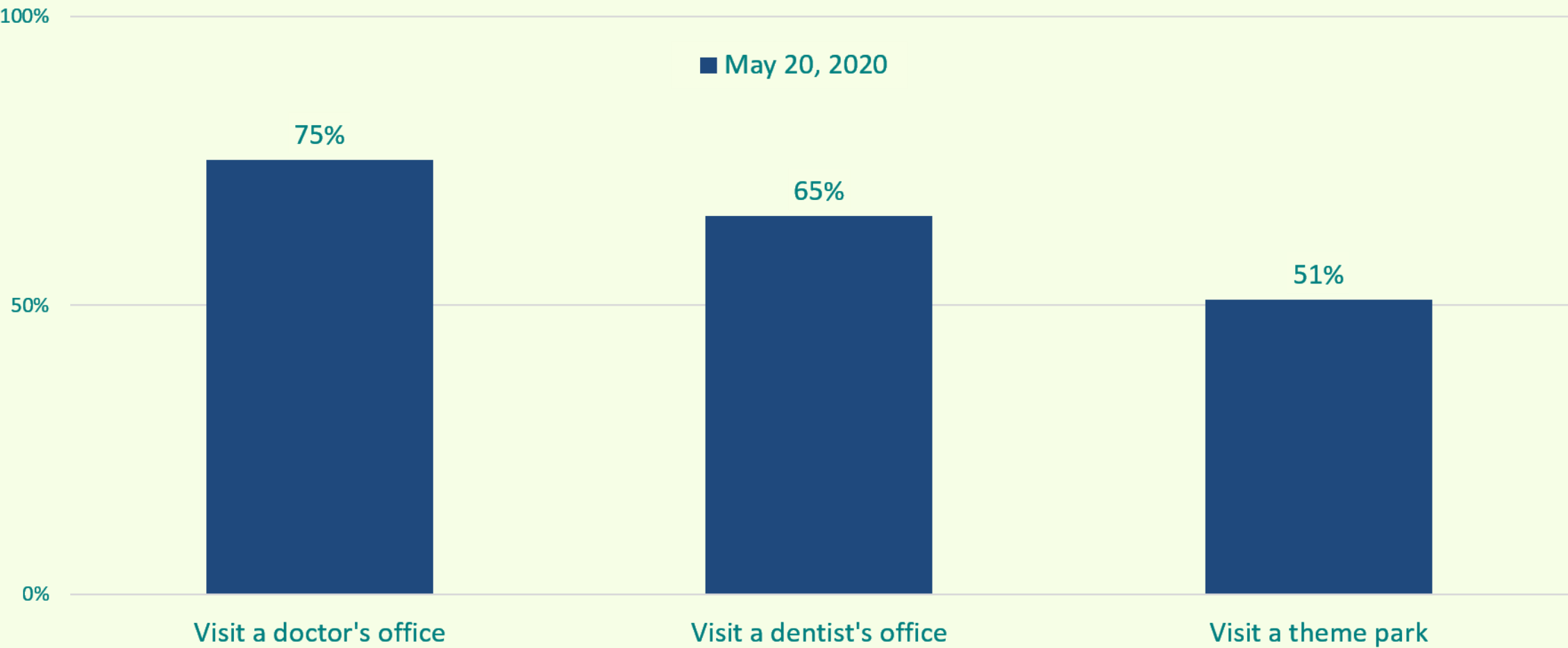


n=547, May 6, 2020; n=593, May 20, 2020



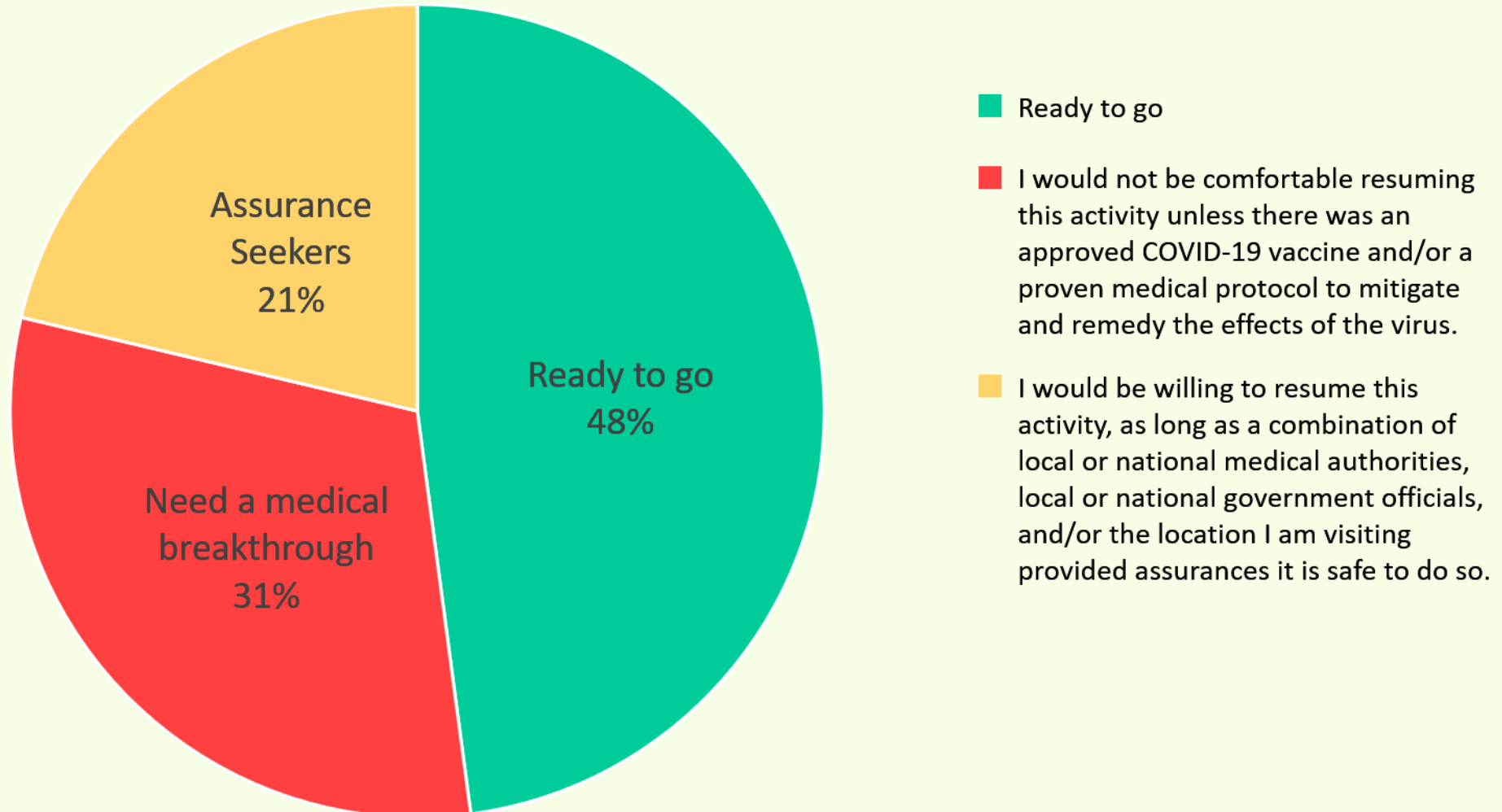
# SIZABLE % WOULD RETURN TOMORROW

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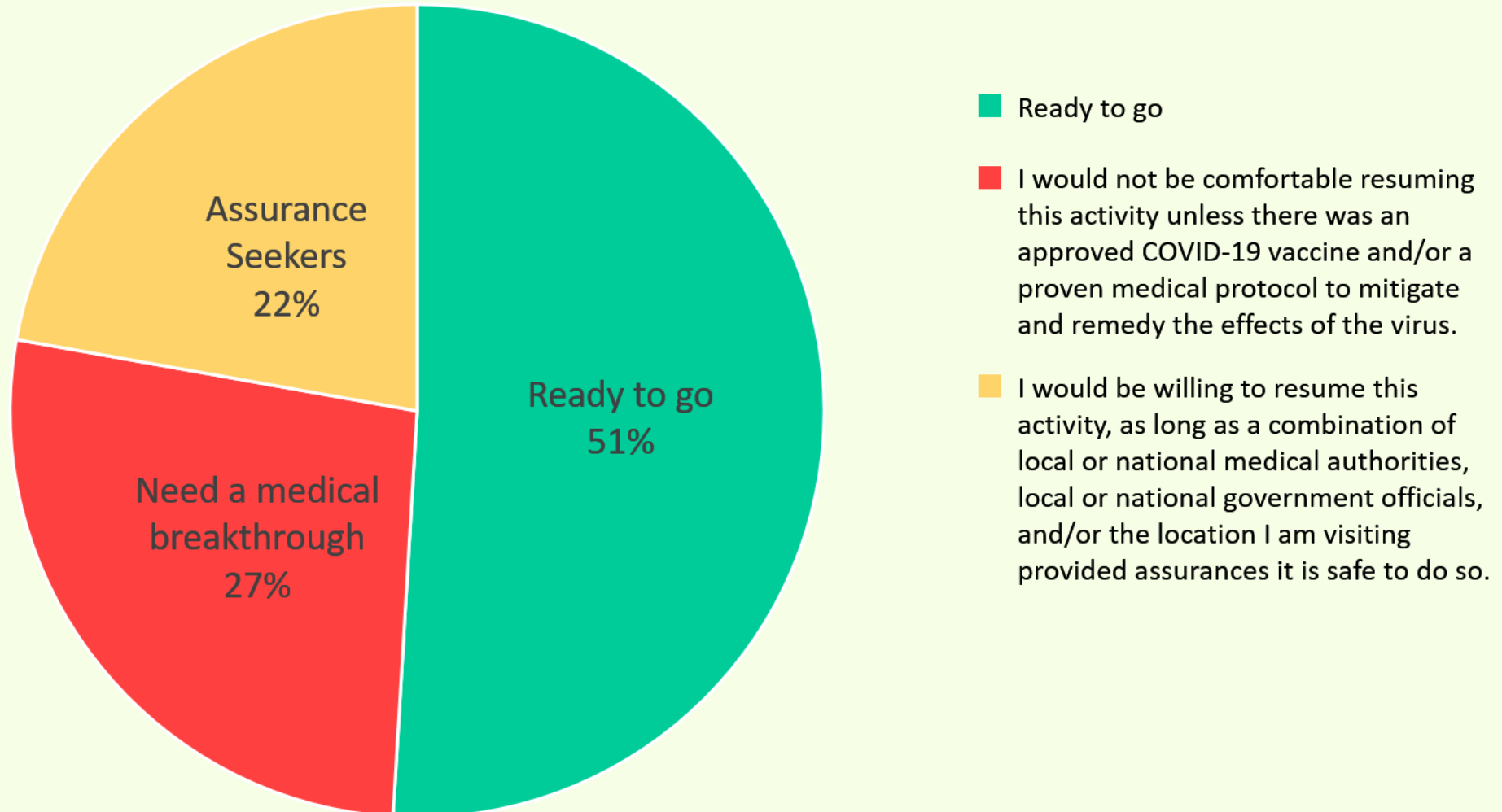
# READY OR NOT: ATTEND A CONFERENCE OR CONVENTION

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



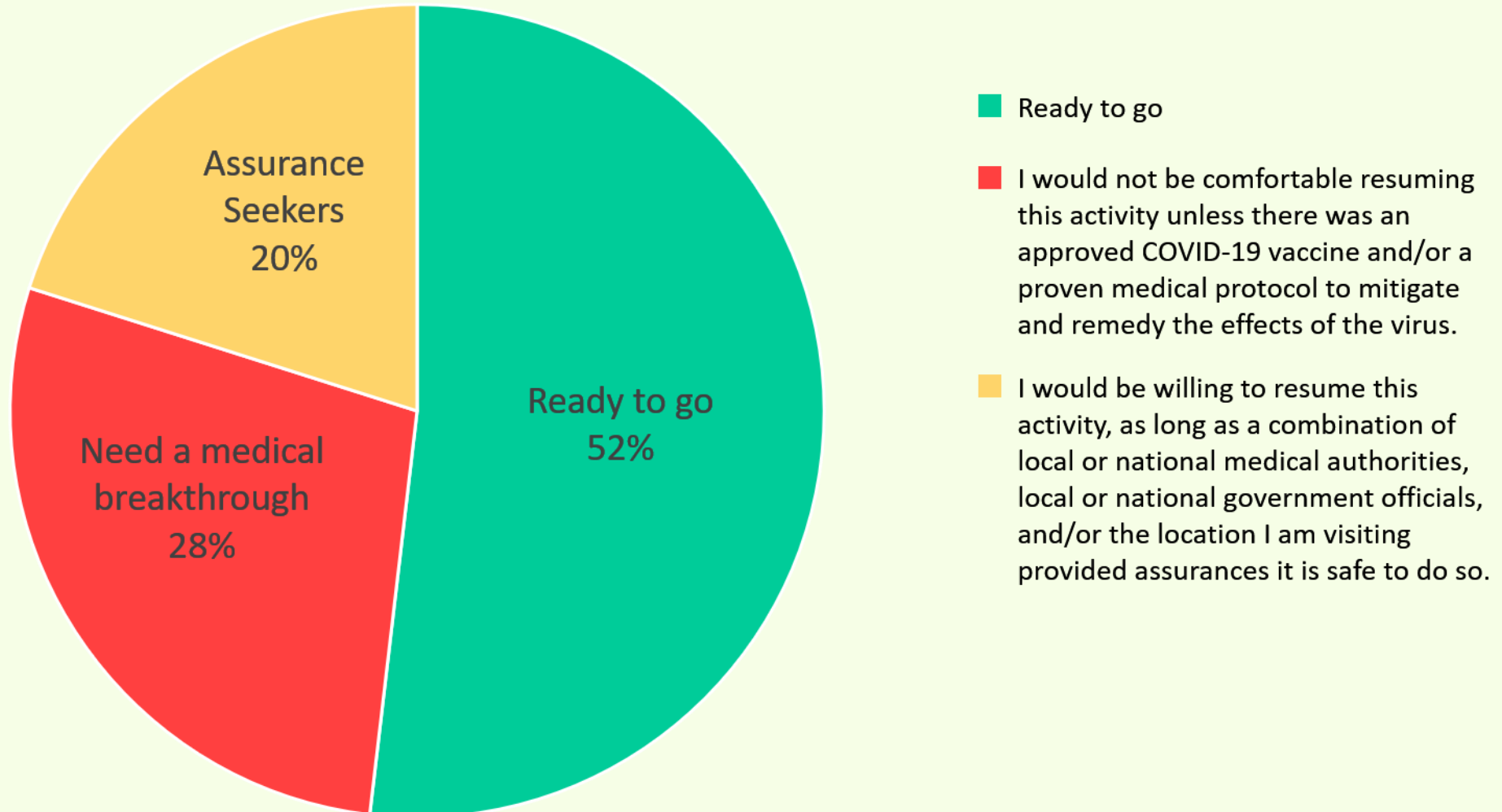
# READY OR NOT: VISIT A THEME PARK

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



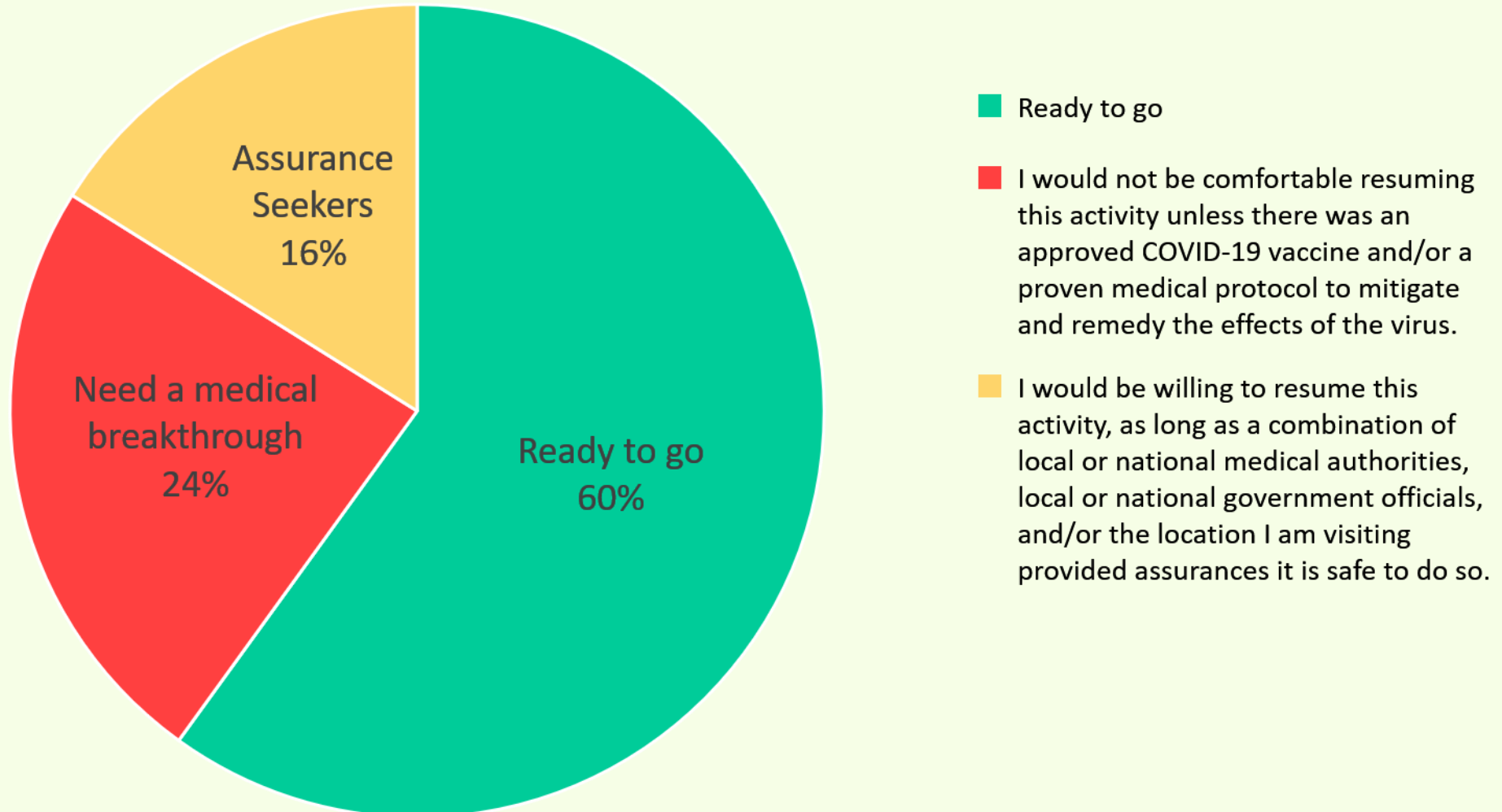
# READY OR NOT: STAY AT A HOTEL OR RESORT

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



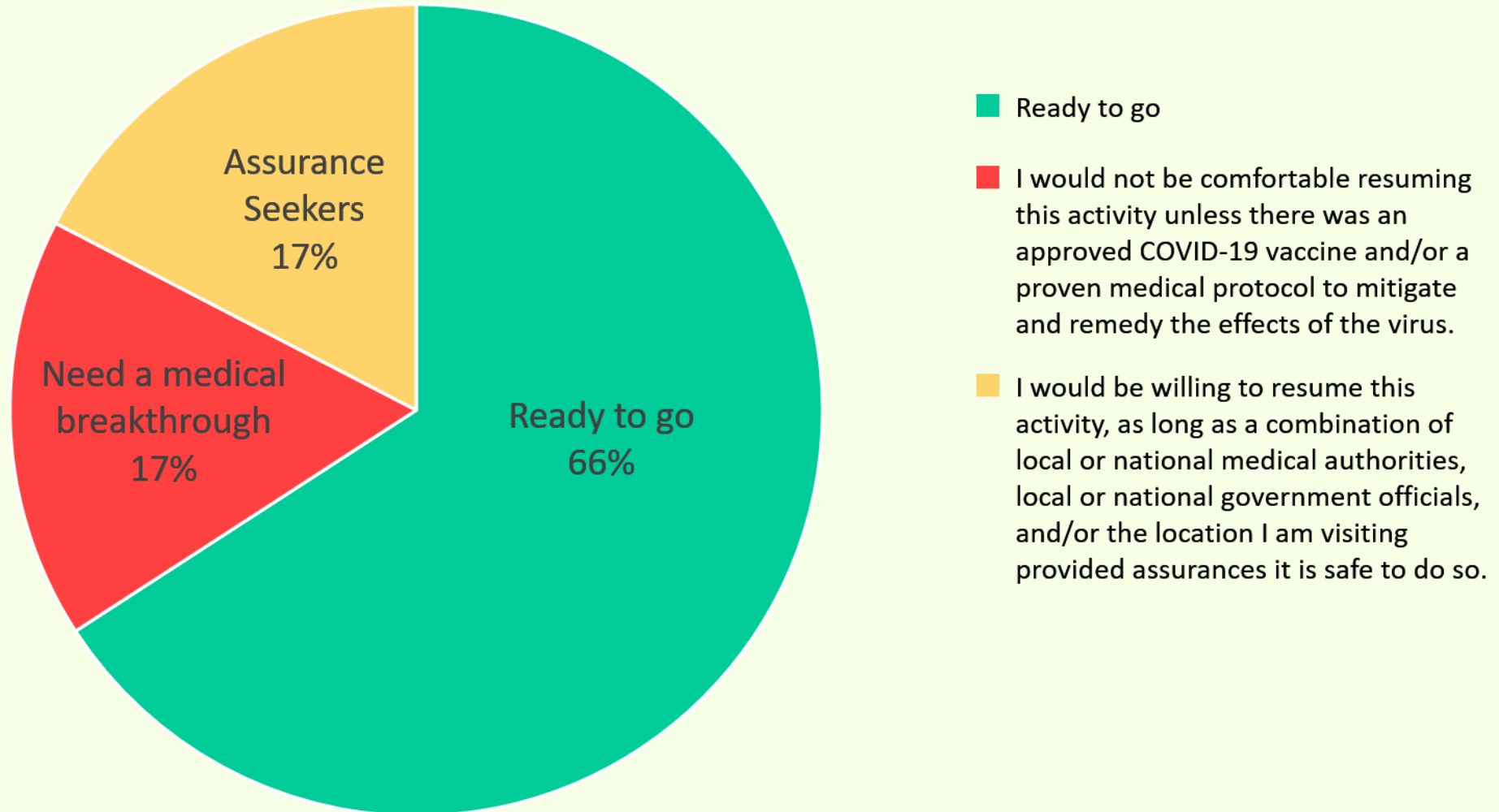
# READY OR NOT: ATTEND A LIVE SPORTING EVENT

Which of the following conditions is closest to your current point of view... Attend a live sporting event



# READY OR NOT: TAKE A CRUISE VACATION

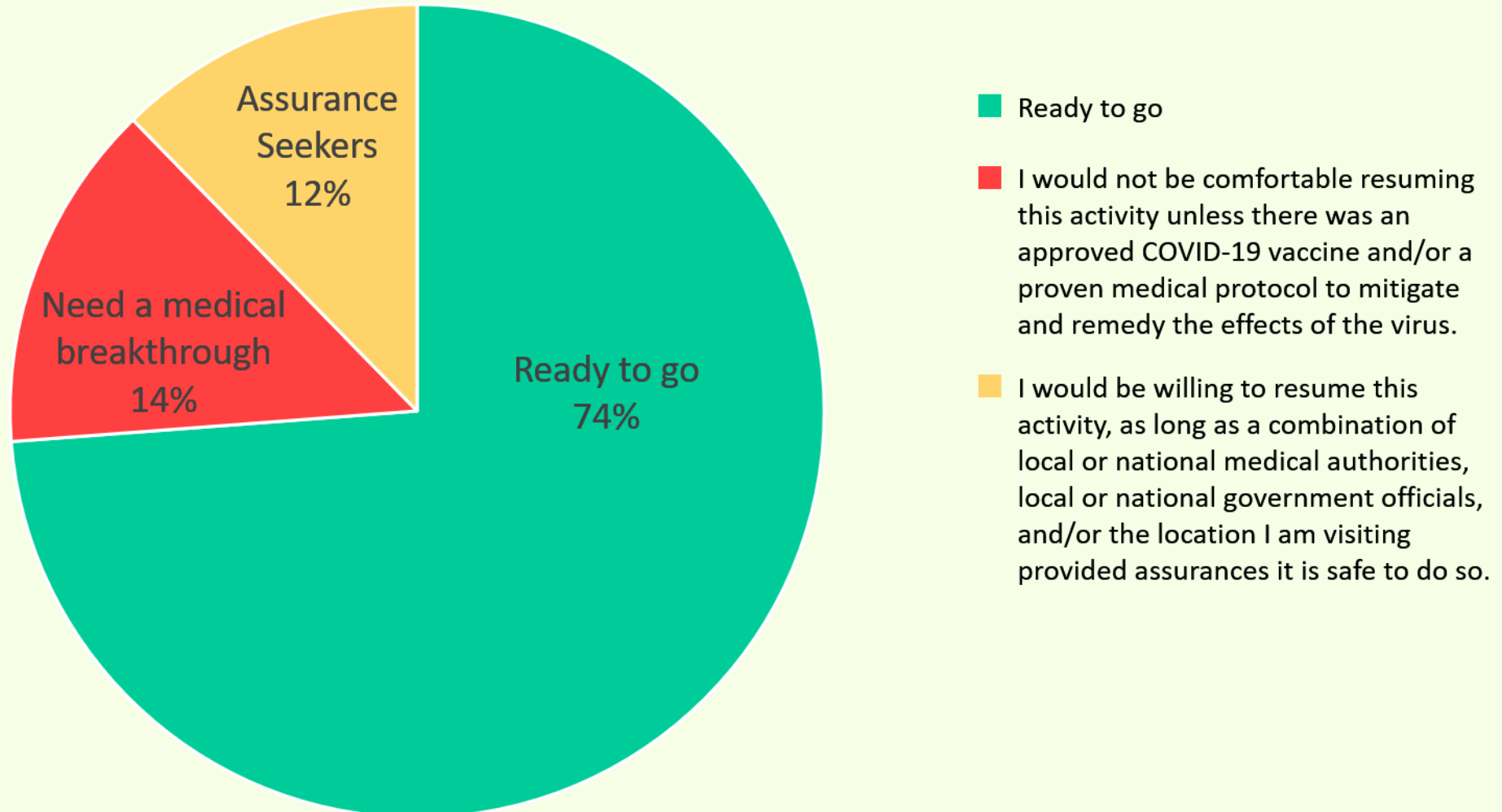
Which of the following conditions is closest to your current point of view... Take a cruise vacation





# READY OR NOT: VISIT A RETAIL STORE

Which of the following conditions is closest to your current point of view... Visit a retail store



# READY-TO-GO: WHAT'S DRIVING THEM?



# READY-TO-GO: WHAT'S DRIVING THEM?

- Those who've become "ready-to-go" were prompted by:
  - Weather/season change: "Spring holds a promise of newness"
  - Seeing local numbers not so bad, hospitals have capacity, no personal connections impacted
  - State's phases are changing from "stay home" to "stay safe"
- Yet, there's still residual hesitation:
  - Misinformation, lack of information, conflicting guidance:  
"It's all ad hoc and confusing"
  - Don't want their effort to be for nothing
  - No vaccine, testing, contact tracing
  - Concern about others in high-risk group

# ABOUT THOSE ASSURANCE-SEEKERS

- Demographically they're:
  - From cities in NE/Midwest
  - Women
  - Middle-aged
  - Half employed full -time
  - Democrats
  - Only 25% live in communities that are presently “open for business”
- Behaviorally they'll:
  - Submit selves and families to TSA temperature checks
  - Wear a mask while watching a film in a theater
  - Allow use of smart phone data for contact tracing

# ABOUT THOSE ASSURANCE-SEEKERS

- They want to see:
  - customer facing staff wearing face masks
  - reconfigured seating to accommodate social distancing
  - prominent listings of sanitization practices implemented by properties
- They're economically stressed:
  - They're most concerned of all segments about the possibility of losing a job or being furloughed
  - They are most likely to believe that the country is in recession



# WITH ASSURANCES, 67% RETURN IN 3 MONTHS

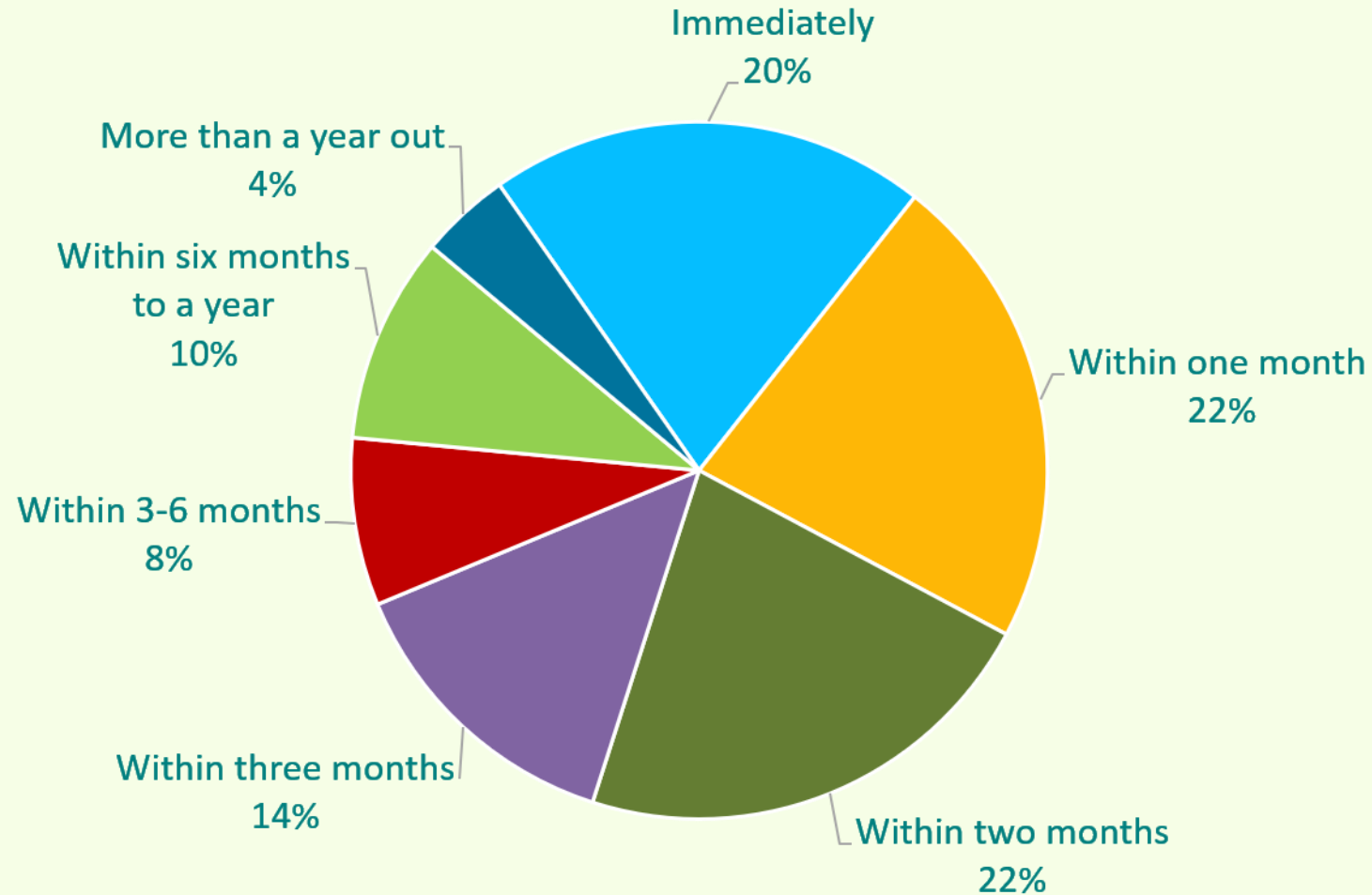
Assuming you had the necessary assurances that it was safe to resume normal activities, how quickly would you next..... Take a trip that included travel of 50 miles or more and 1+ nights in a hotel or other paid lodging?





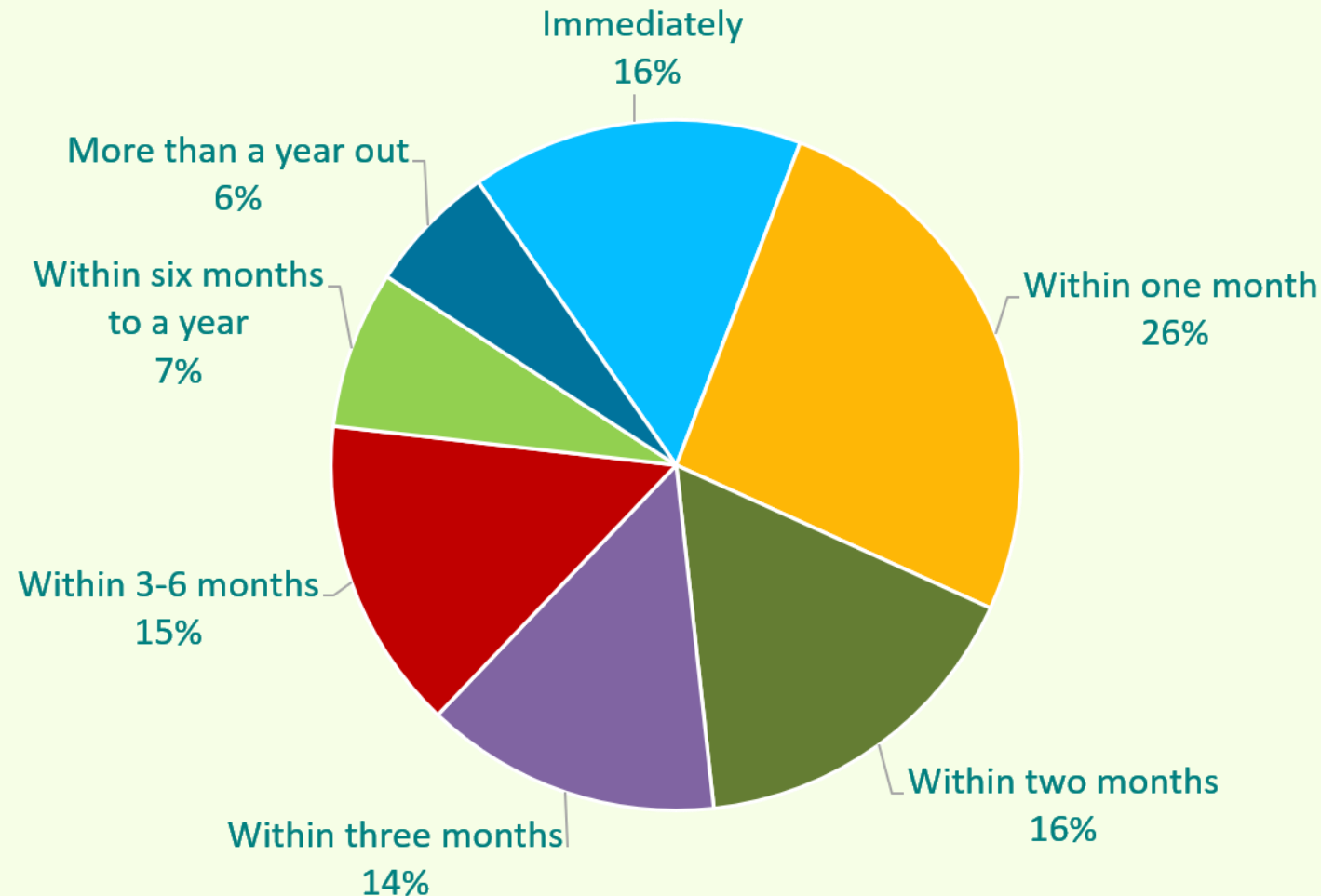
# WITH ASSURANCES, 68% RETURN IN 3 MONTHS

Assuming you had the necessary assurances that it was safe to resume normal activities, how quickly would you next..... Take a cruise vacation?



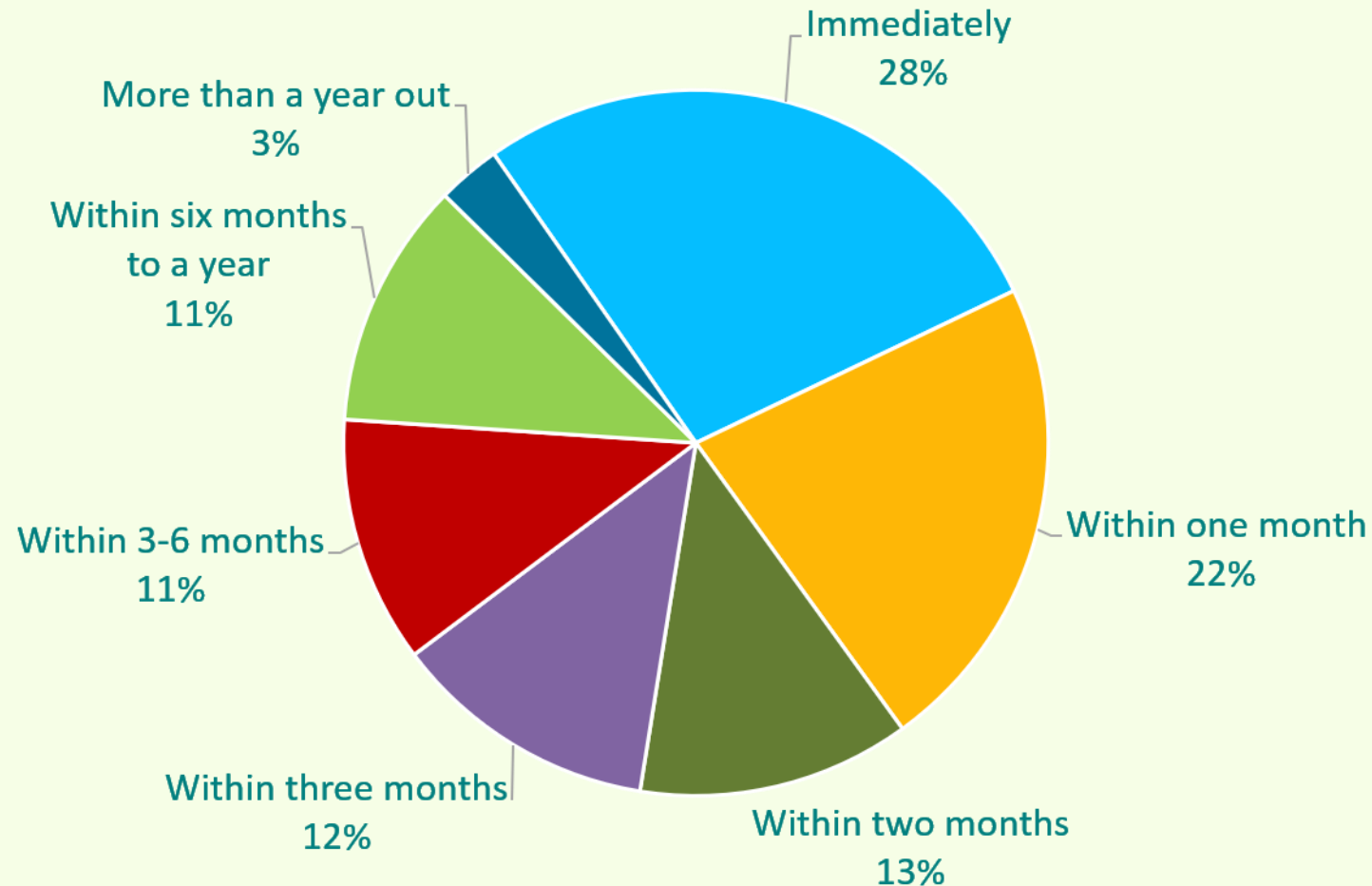
# WITH ASSURANCES, 72% RETURN IN 3 MONTHS

Assuming you had the necessary assurances that it was safe to resume normal activities, how quickly would you next..... Visit a theme park?



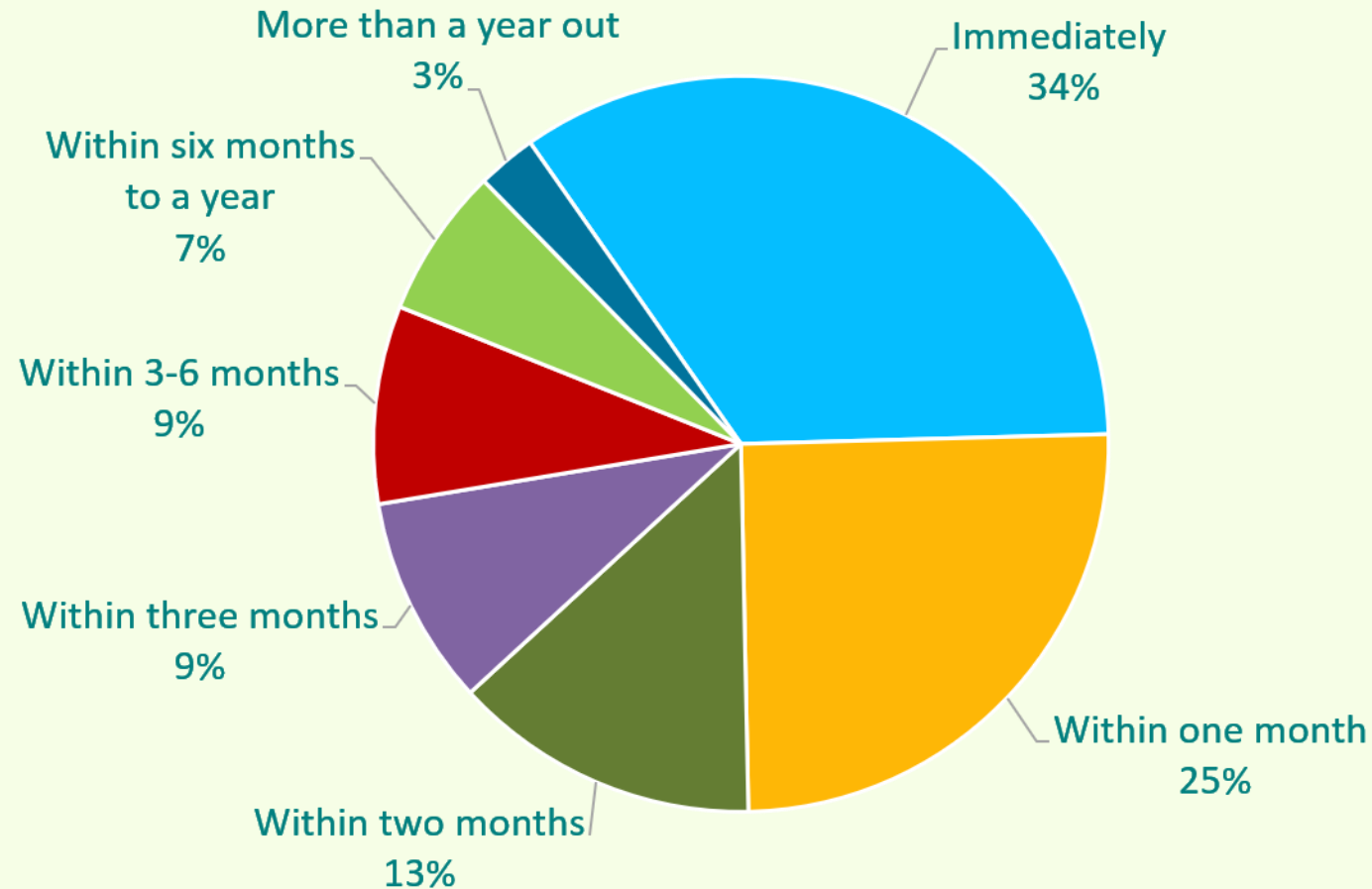
# WITH ASSURANCES, 75% RETURN IN 3 MONTHS

Assuming you had the necessary assurances that it was safe to resume normal activities, how quickly would you next..... Attend a live sports event?



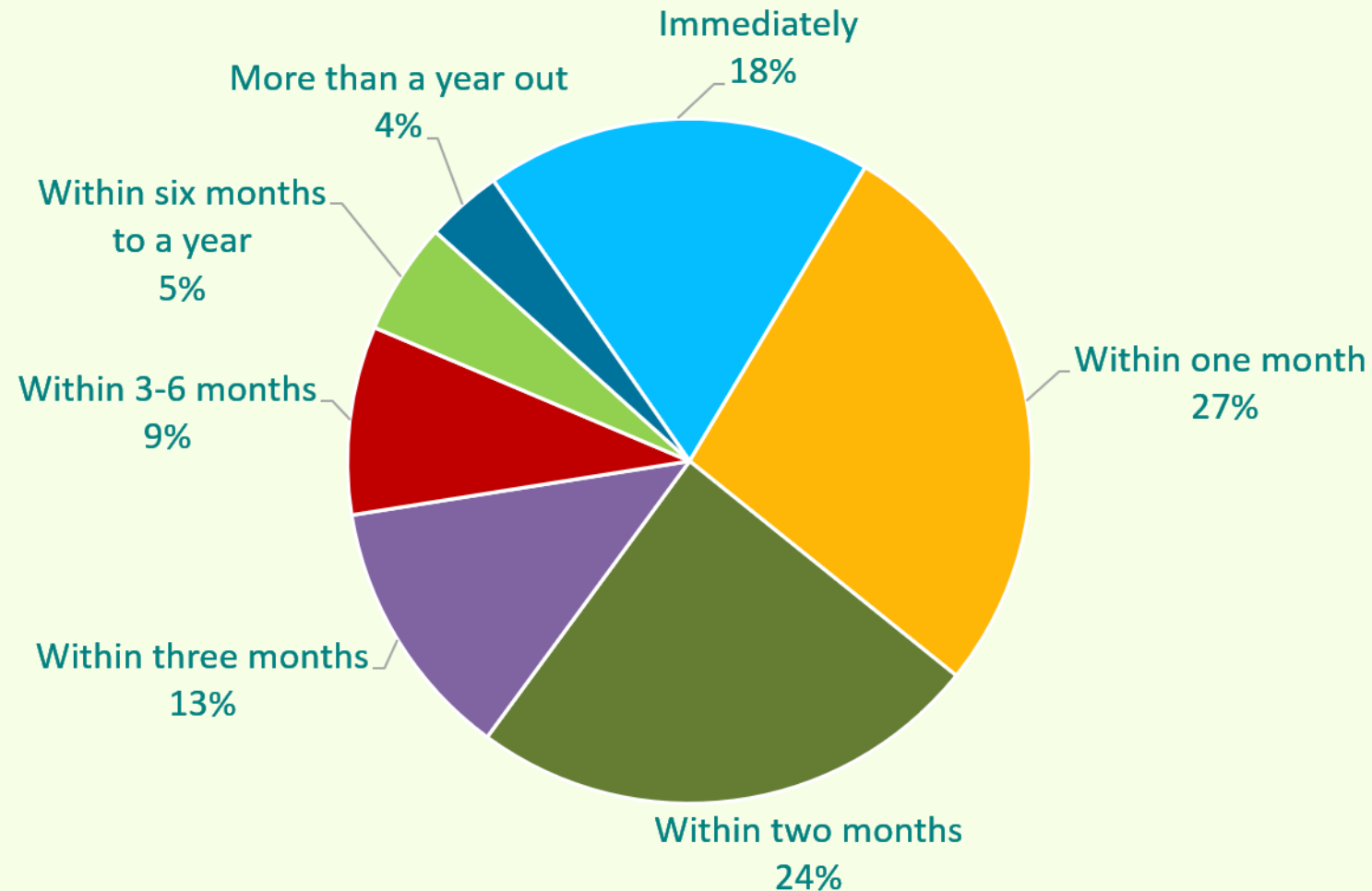
# WITH ASSURANCES, 81% RETURN IN 3 MONTHS

Assuming you had the necessary assurances that it was safe to resume normal activities, how quickly would you next..... Visit a retail store?



# WITH ASSURANCES, 82% RETURN IN 3 MONTHS

Assuming you had the necessary assurances that it was safe to resume normal activities, how quickly would you next..... Attend a conference or convention?



# U.S. Travel

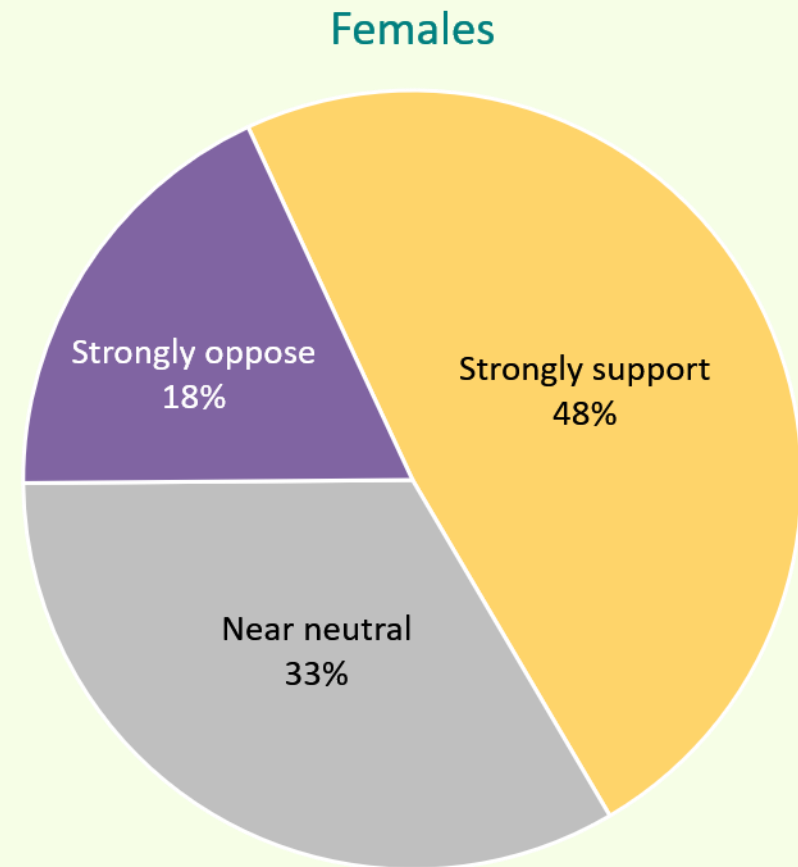
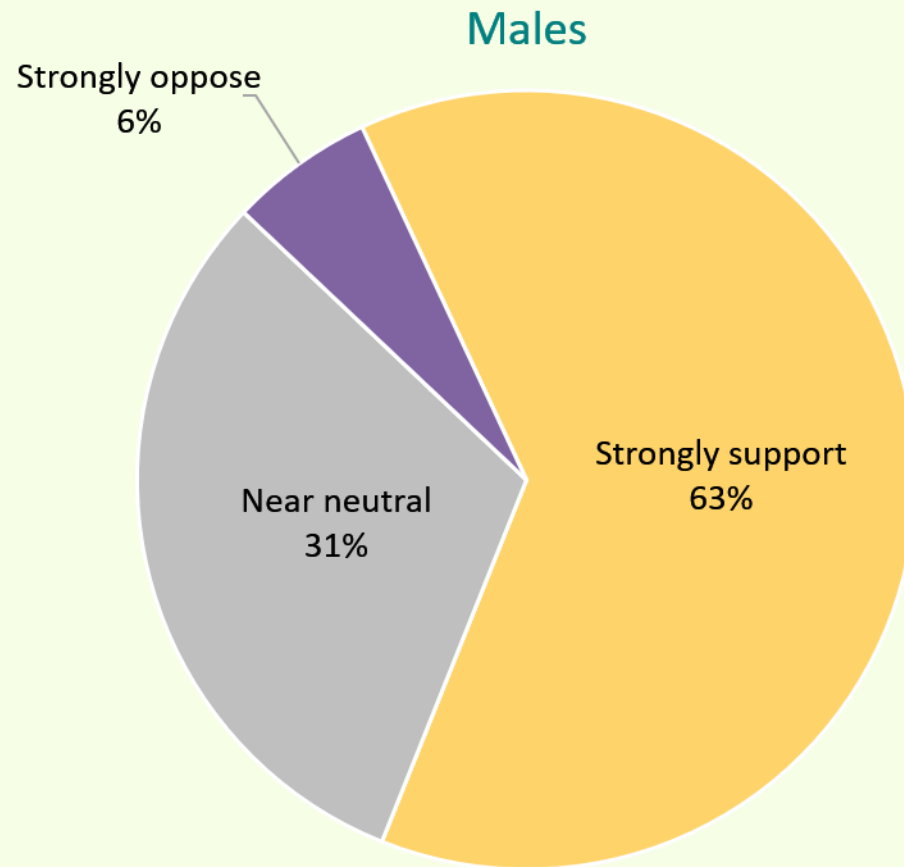


# RESPONDENTS TOLD ABOUT CONTACT TRACING

Contact tracing is the process by which public health staff work with a patient with COVID-19 to help them recall everyone with whom they have had close contact during the timeframe while they may have been infectious. Public health staff then warn these exposed individuals (contacts) of their potential exposure as rapidly and sensitively as possible. To protect patient privacy, contacts are informed only that they may have been exposed to a patient with the infection; they are not told the identity of the patient who may have exposed them. Contacts are encouraged to stay home and maintain social distance from others until 14 days after their last exposure, in case they also become ill.

# GENDER DIVIDE OVER CONTACT TRACING

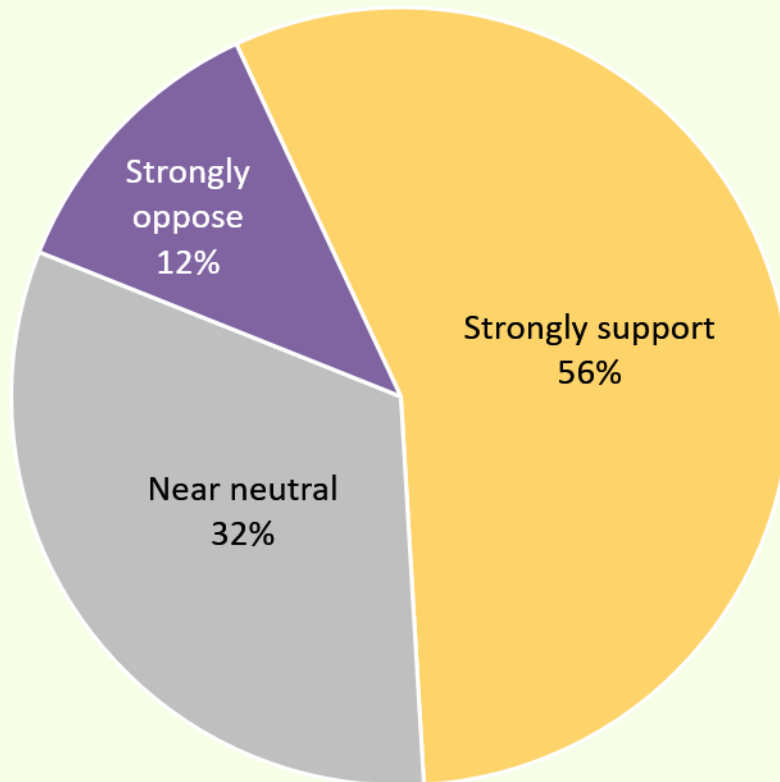
On a scale from 1 to 10, how strongly do you support or oppose expanding contact tracing in your community?  
One means you strongly oppose it, and 10 means you strongly support it.



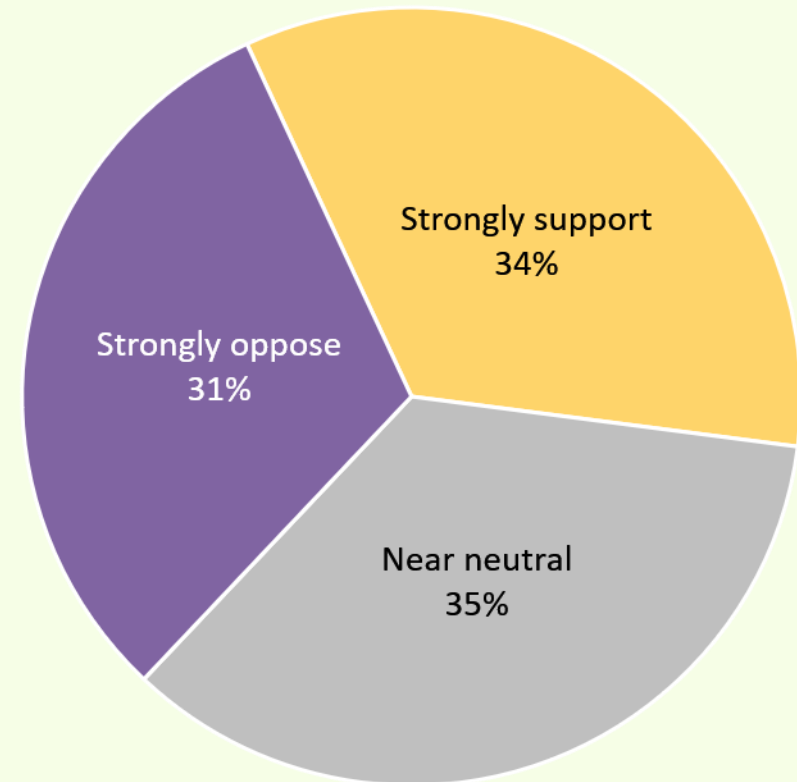
# GENDER DIVIDE OVER CONTACT TRACING

On a scale from 1 to 10, how strongly do you support or oppose allowing contact tracers access to a portion of your smartphone data, to determine who you may have come in contact with in previous days? One means you strongly oppose it, and 10 means you strongly support it.

Males



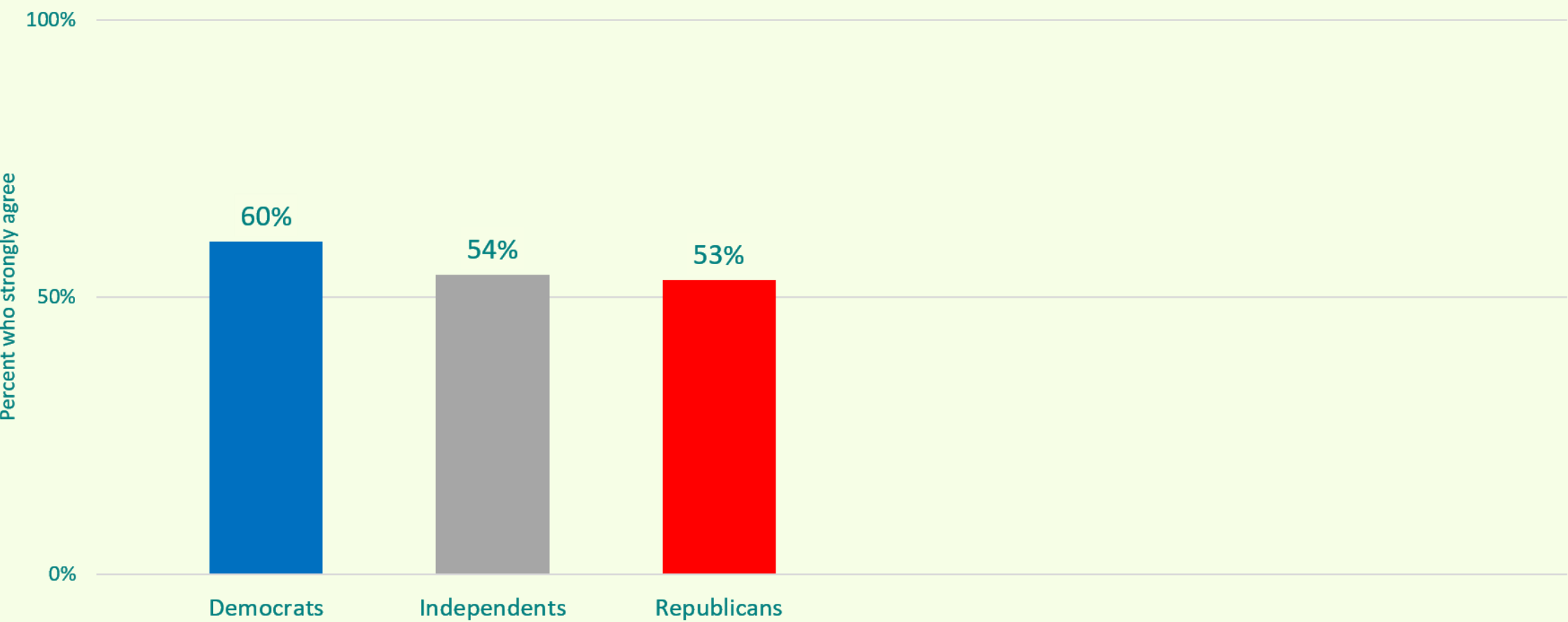
Females



# Masks: The story that matters

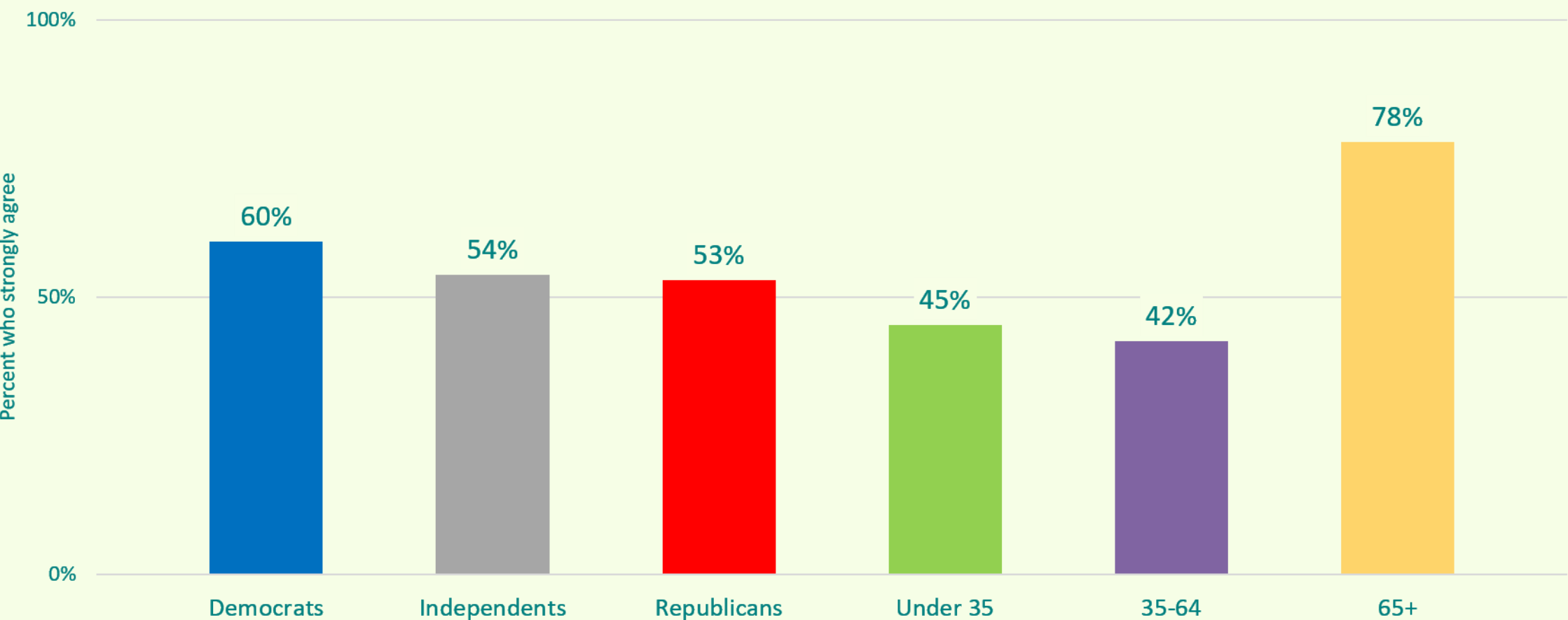
# MASK-WEARING IS ABOUT AGE, NOT POLITICS

On a scale from 1 to 10, how strongly do you agree or disagree with this statement: People who refuse to wear a mask in public are inconsiderate



# MASK-WEARING IS ABOUT AGE, NOT POLITICS

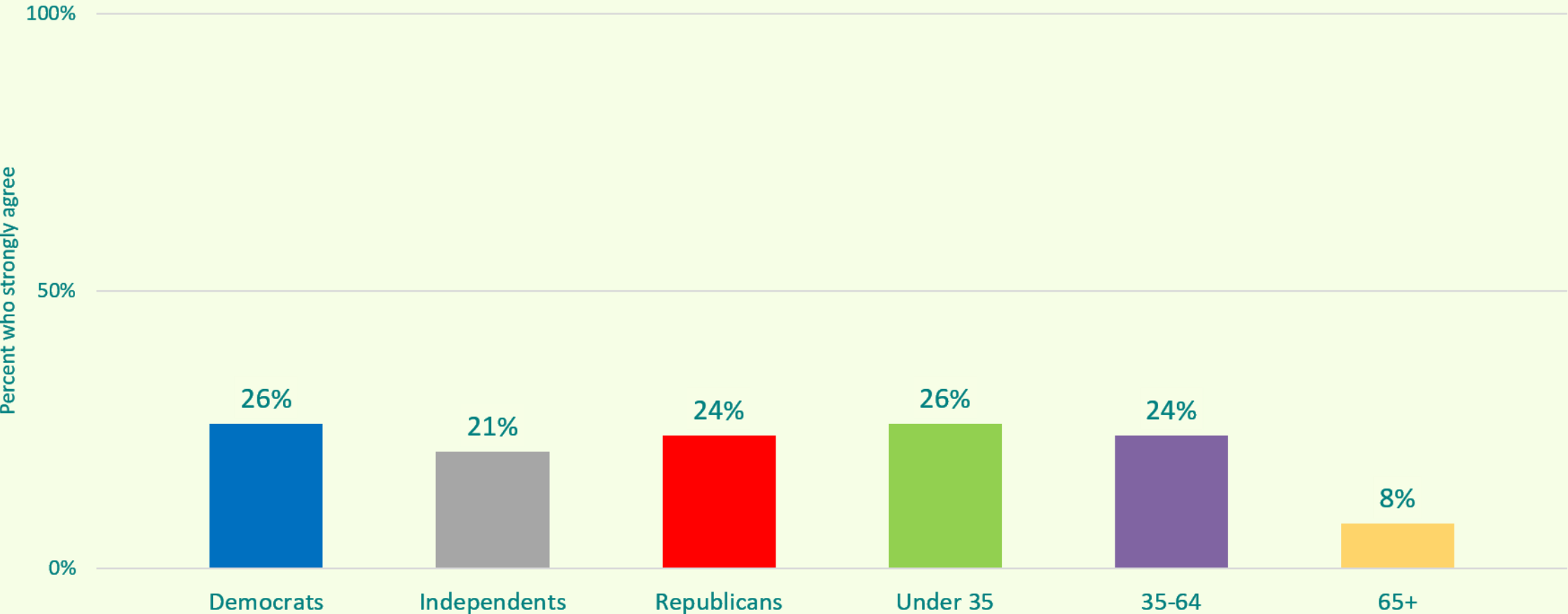
On a scale from 1 to 10, how strongly do you agree or disagree with this statement: People who refuse to wear a mask in public are inconsiderate





# MASK-WEARING IS ABOUT AGE, NOT POLITICS

On a scale from 1 to 10, how strongly do you agree or disagree with this statement: It is unclear to me when one needs to wear a mask in public

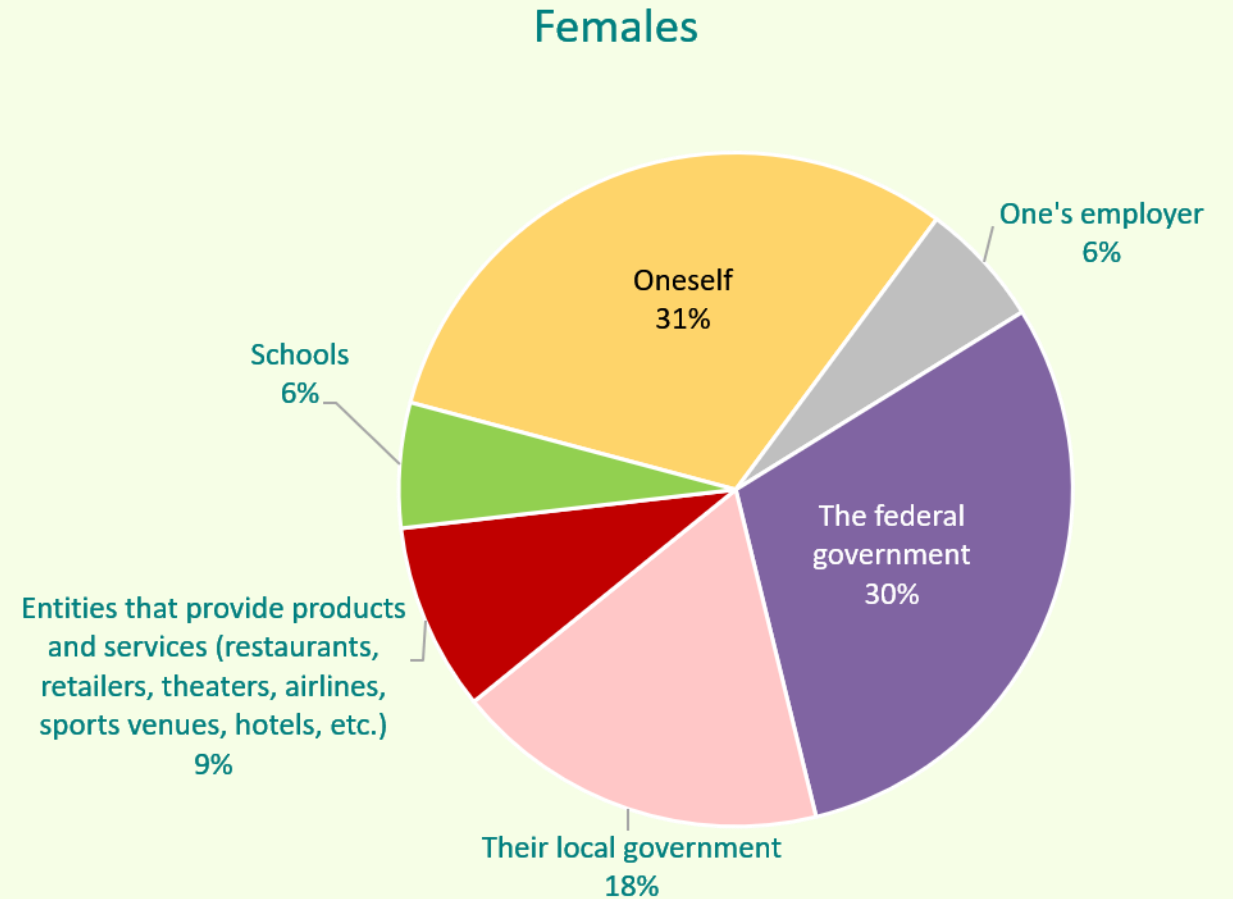
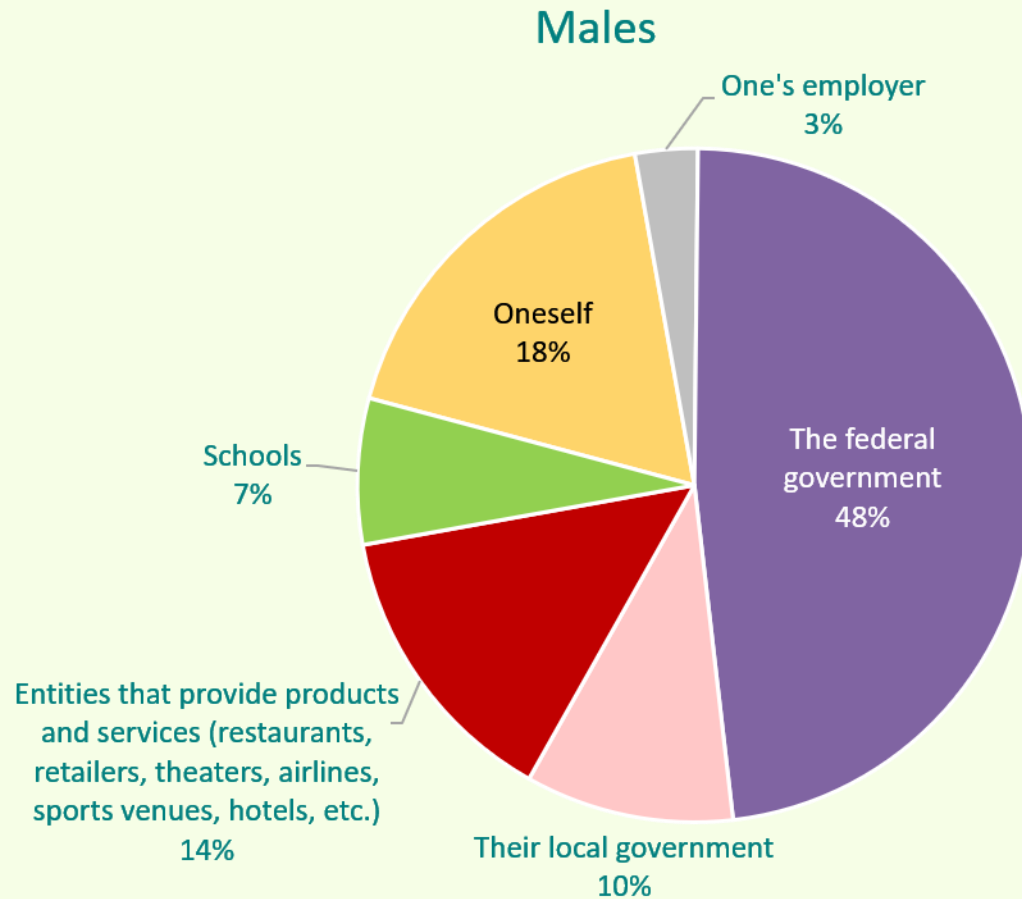




# **Back to the workplace: Know what employees want...and expect**

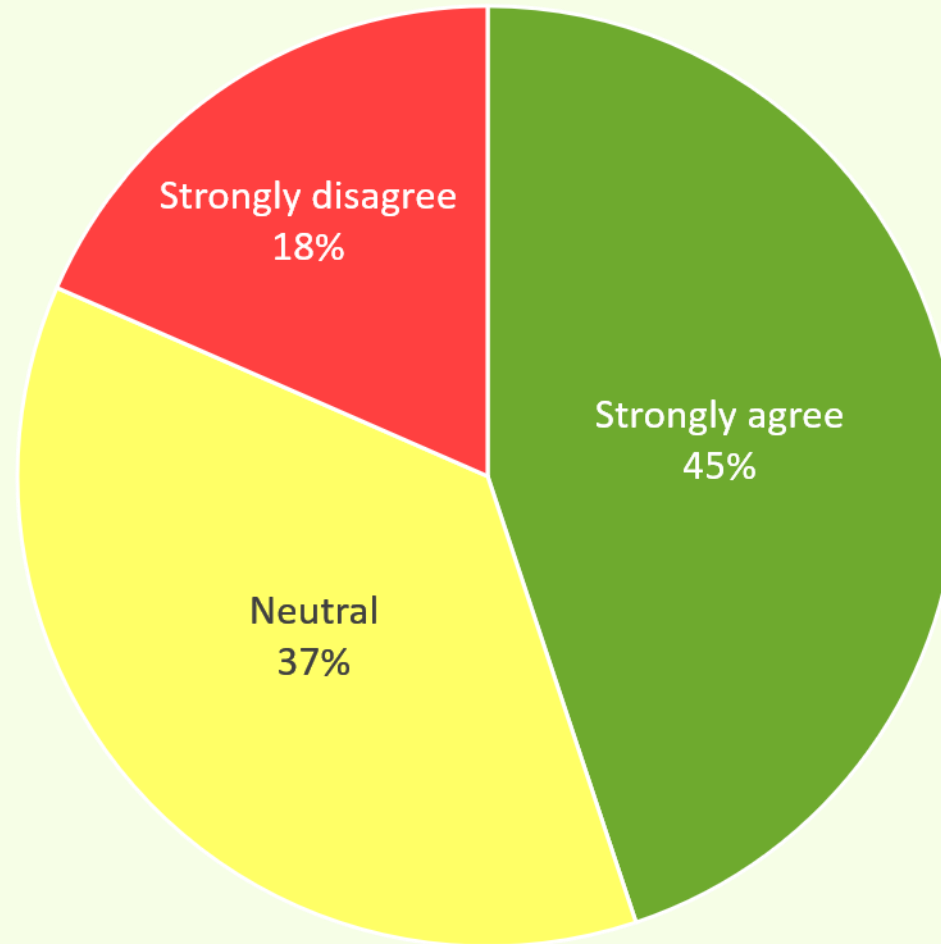
# WHO'S MOST RESPONSIBLE FOR YOUR SAFETY?

Which entity is MOST responsible for ensuring that as Americans start to return to normal activities, they don't catch COVID-19?



# MANY EMPLOYEES WILL STILL WANT TO WFH

Once the economy reopens I would be open to continue working from home at least as much as I am now

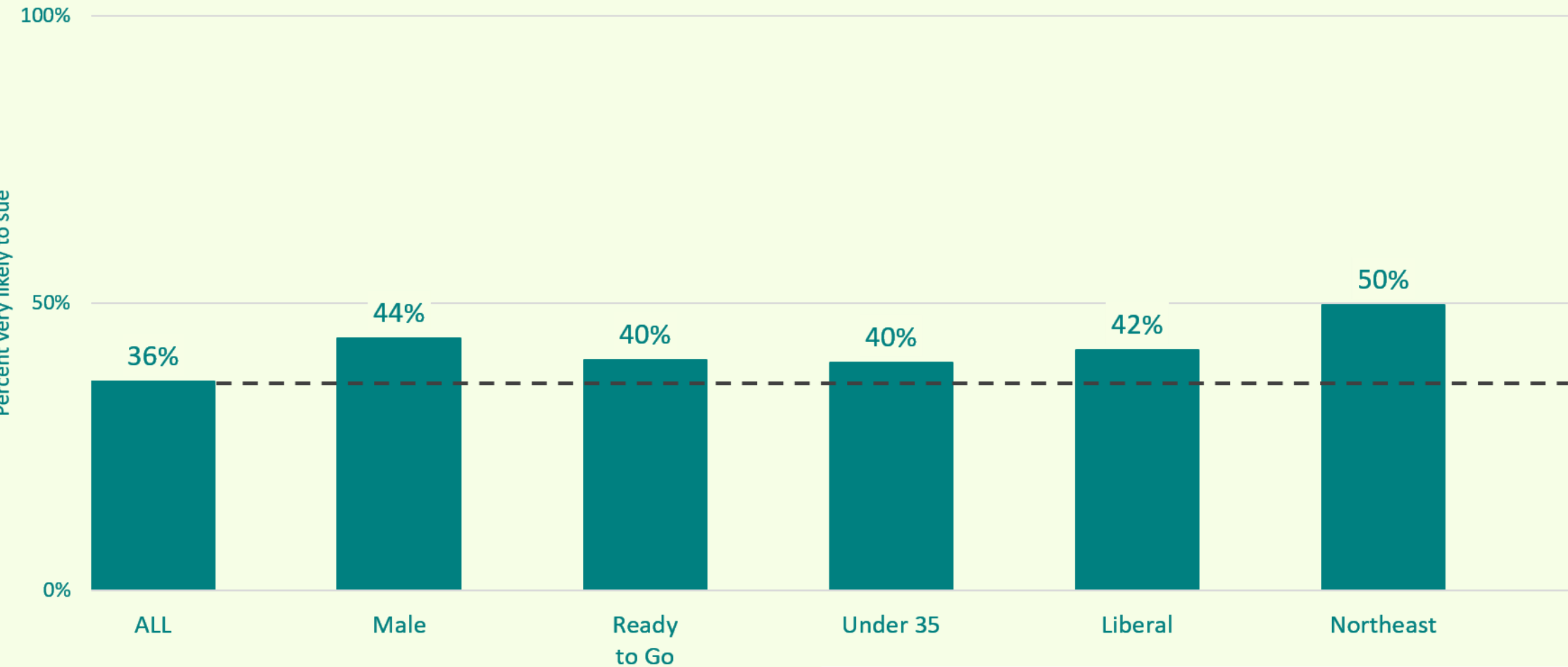


## ...AND WILL BE SENSITIVE TO BEING BACK

- “If my employer makes us use web-based video conferencing while at the office, I will question why we are working from the office in the first place.”
  - 44% strongly agree
- “If people can remove a mask in their personal offices, and people in common areas cannot, that is a form of discrimination.”
  - 32% strongly agree

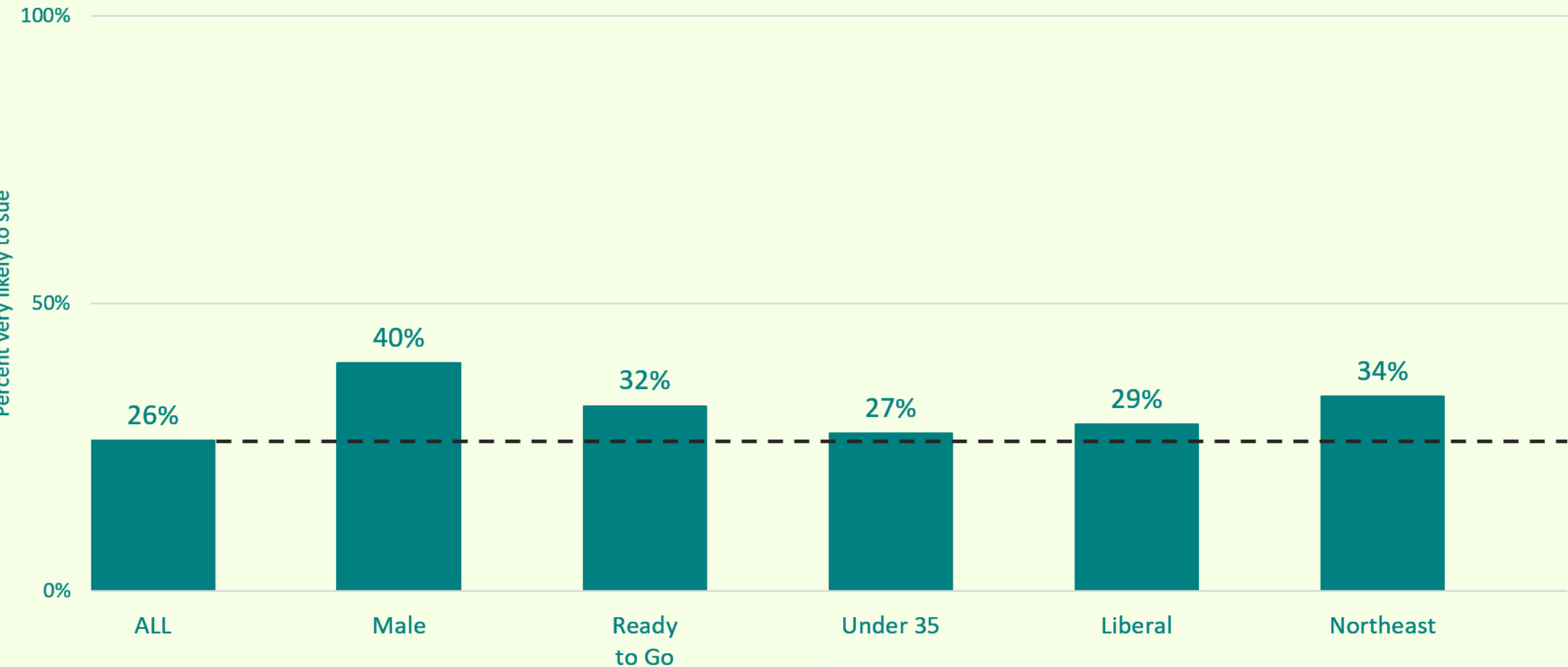
# EMPLOYEES WILLING TO SUE THEIR EMPLOYERS

Imagine you returned to work on the first of the month, and on the seventh of the month you found out that one of the co-workers had COVID-19. A few days later you came down with the illness yourself. On a scale from 1 to 10, how likely would you be to pursue legal action against your employer?



# EMPLOYEES WILLING TO SUE THEIR EMPLOYERS

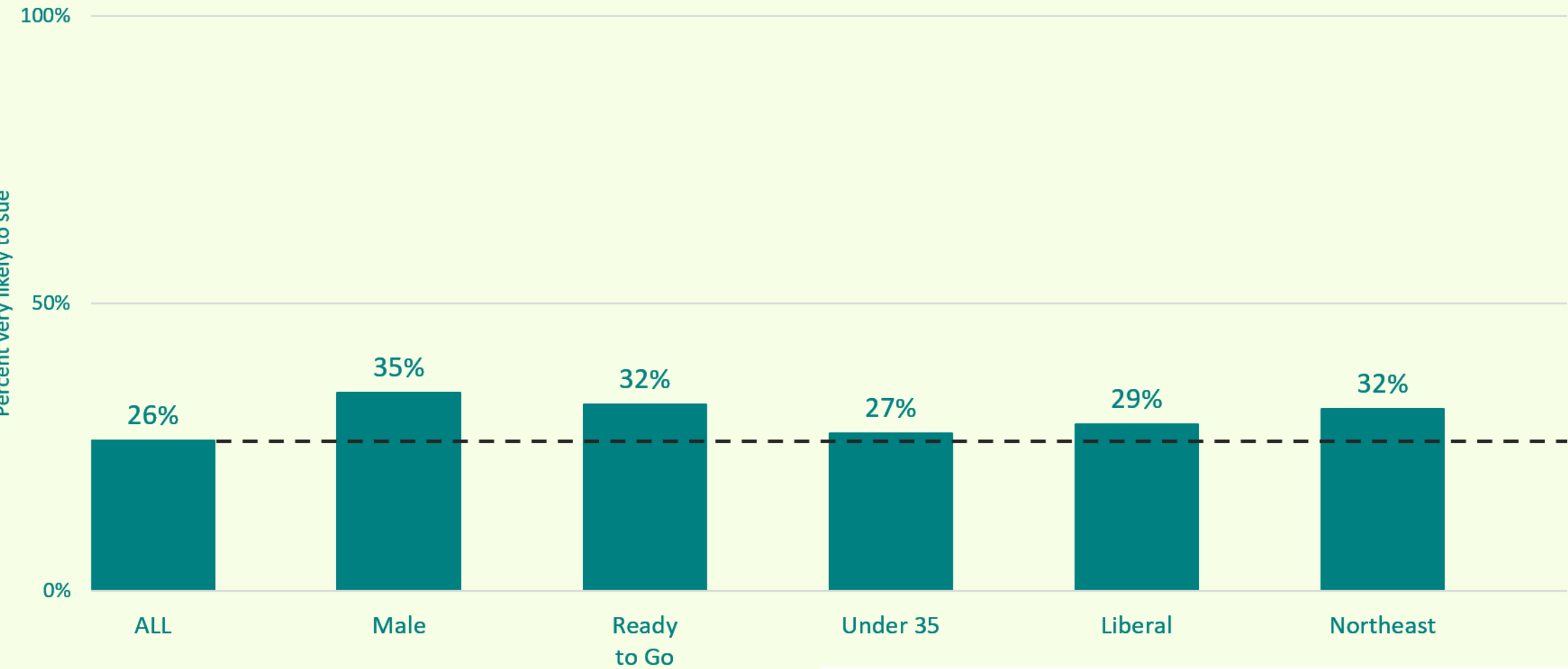
Imagine the same scenario as above, but you were confident your employer had closely followed every protocol to sanitize the premises, maintain social distancing, require face masks, and conduct COVID-19 testing of all employees. In that situation, on a scale from 1 to 10, how likely would you be to pursue legal action against your employer?





# RELEASE-SIGNING EMPLOYEES WILLING TO SUE EMPLOYER

Imagine the same scenario as above, but the only difference is that you signed a release before returning to work, holding your employer harmless if you came down with COVID-19. In that situation, on a scale from 1 to 10, how likely would you be to pursue legal action against your employer?

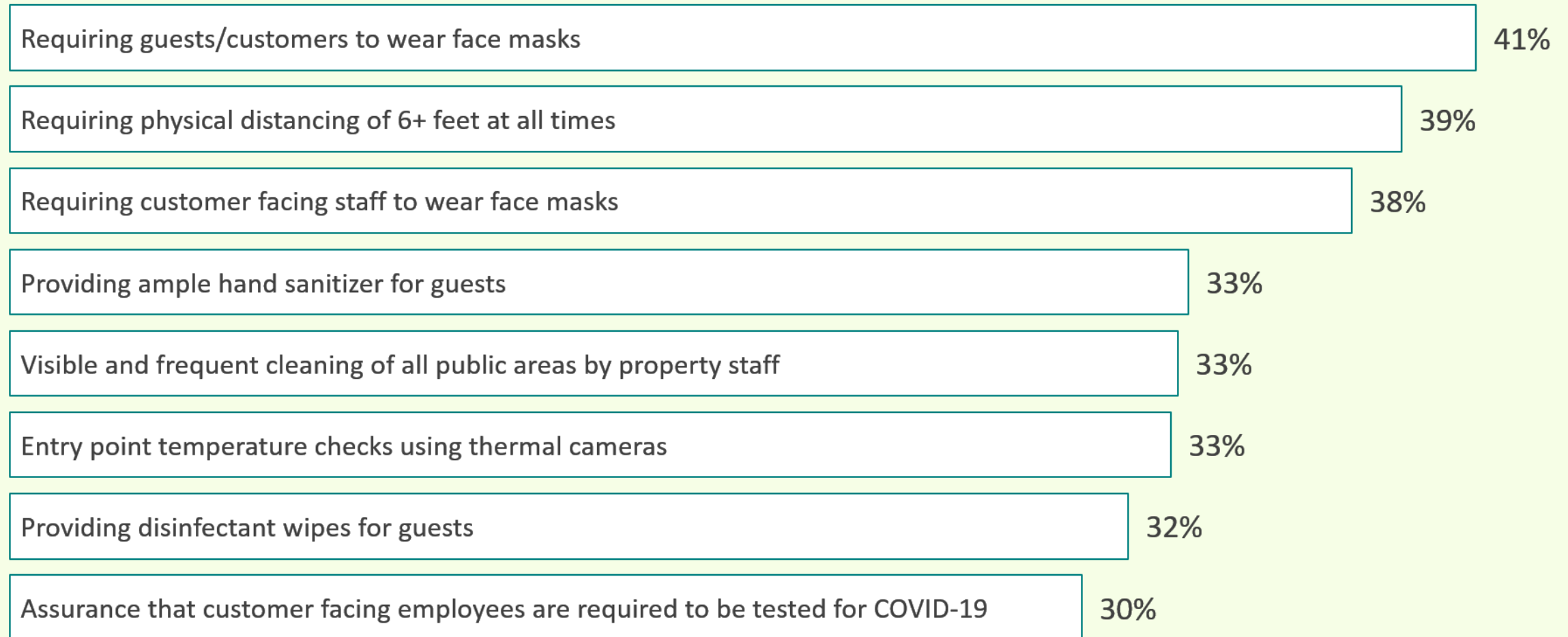


# TAKE A DEEP BREATH; MOST WON'T SUE

- They are realistic about the situation
  - Hesitant to sue employer unless they are lackadaisical
  - Employees must assume a level of risk returning to work
  - Difficult to trace illness with a specific exposure
- What should companies do to avoid legal conflicts?
  - State the “rules” for returning; follow and enforce them consistently
  - Take care of people who become sick with COVID-19
  - Hold a re-orientation for employees to review policy changes
  - Sign an agreement that employees will follow rules and company isn't liable

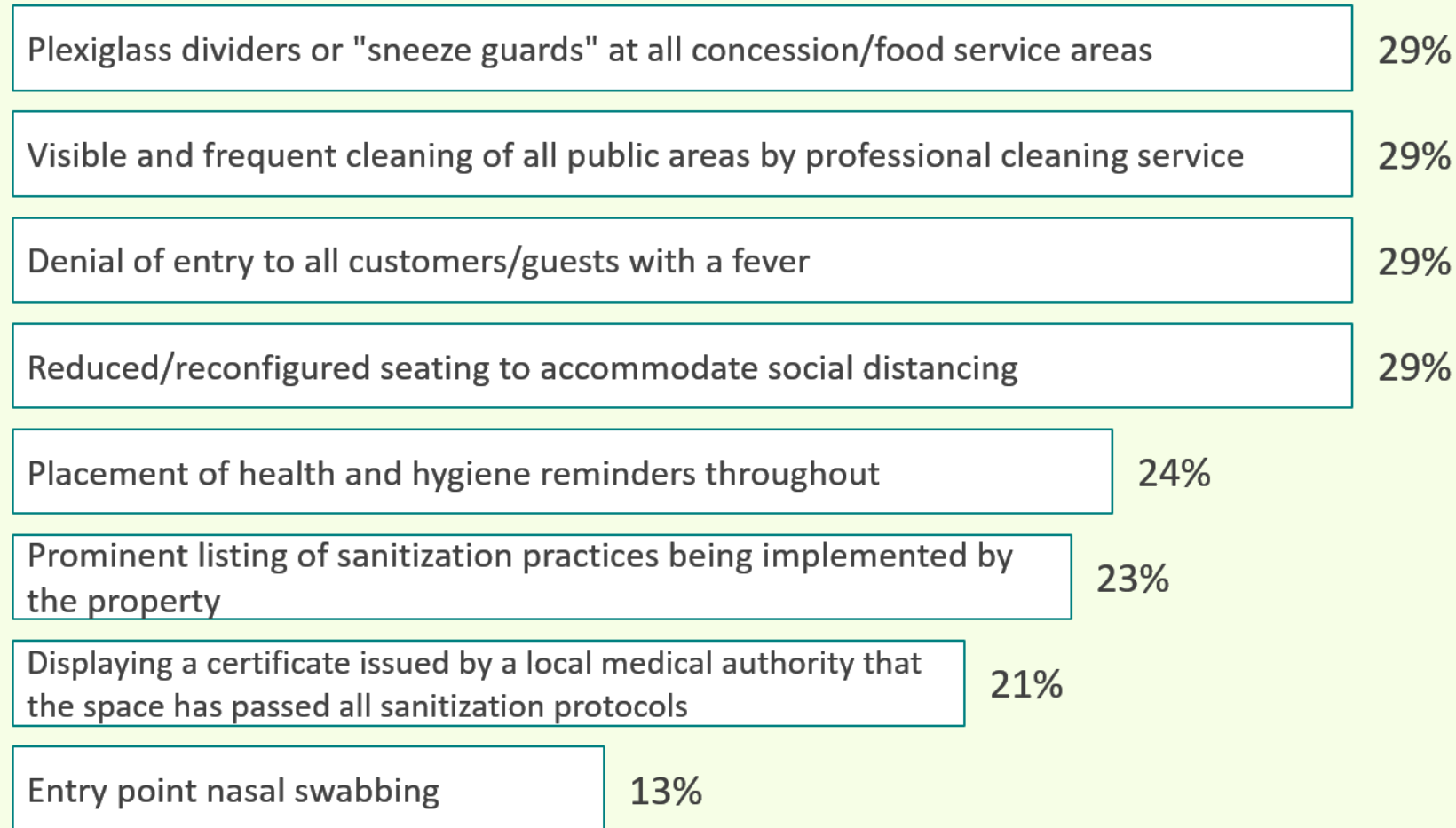
# PRECAUTIONS EMPLOYERS SHOULD TAKE

Which of the following are the most important steps your employer or business must take to prevent people in your workplace from catching COVID-19?



# PRECAUTIONS EMPLOYERS SHOULD TAKE

Which of the following are the most important steps your employer or business must take to prevent people in your workplace from catching COVID-19?





# **ONLINE DIAL TEST: A BOSS ANTICIPATES HER STAFF'S RETURN**

# GETTING MOMENT-TO-MOMENT FEEDBACK

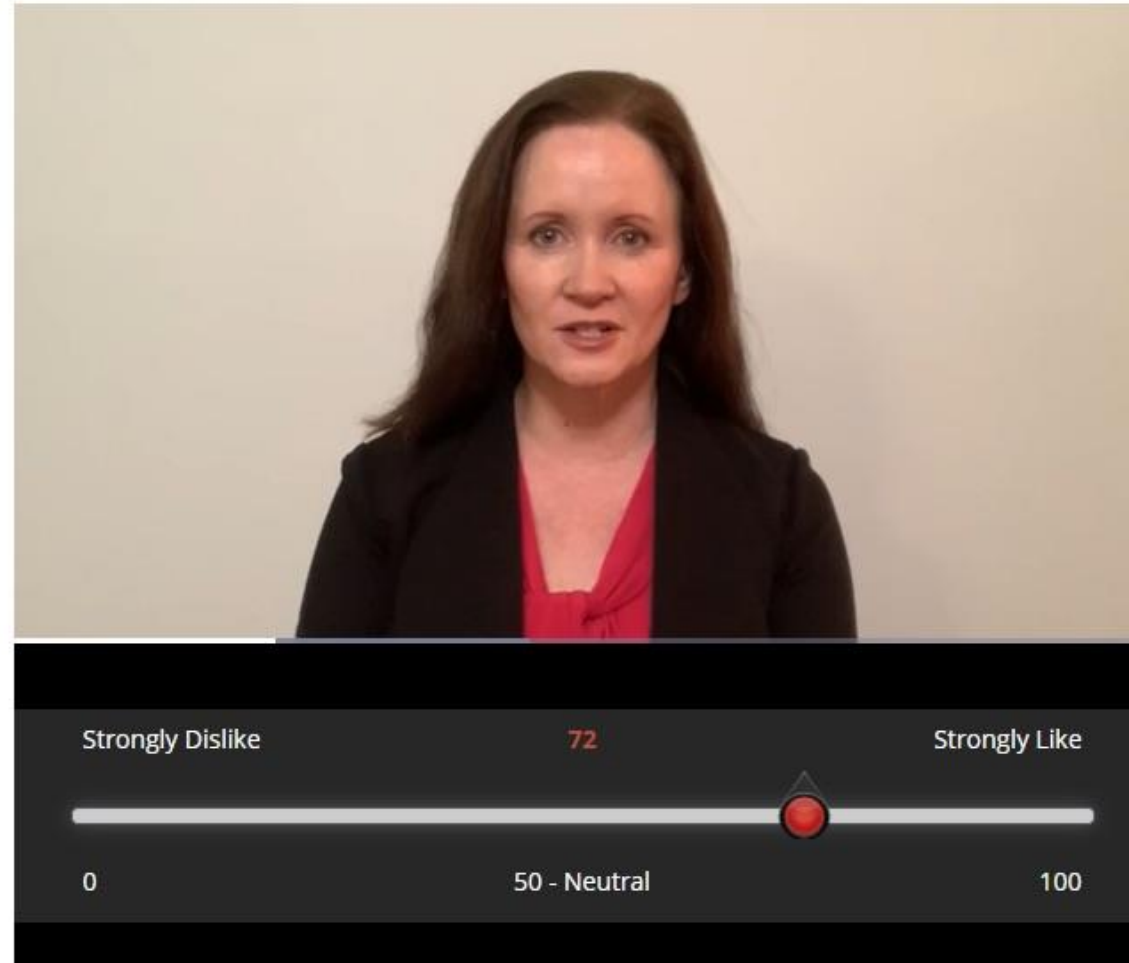
- 36 working-from-home Americans watched a two-minute video embedded in an online survey
- They were told: “You are going to see a video that could be from the president of any small or midsize business in America that operates out of an office, but where the employees currently are working from home. I’d like you to imagine, for the sake of this exercise, the person in the video is your boss, and has made this video to send to all employees.”

Please do not refresh, resize or move your browser once you start viewing.

Please rate this video for how much you dislike or like what you are hearing at any point during the video. **Zero** means you **strongly dislike** what you're hearing and **100** means you **strongly like** what you're hearing.

**Please rate continuously and do NOT wait until the end to provide your feedback.**

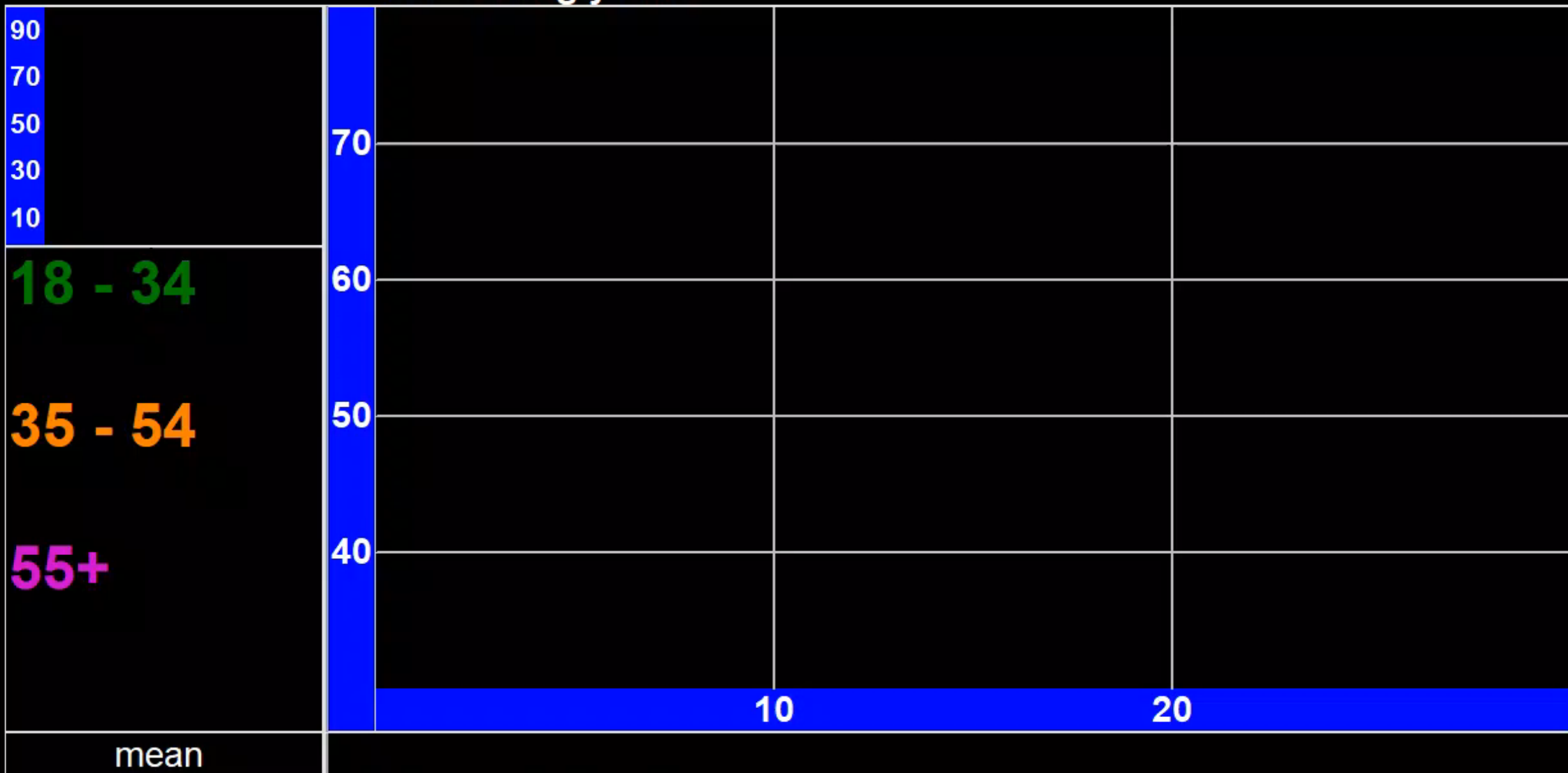
The slider will be on a scale of 0 - 100, with **0 = Strongly Dislike** and **100 = Strongly Like**.



The video player displays a woman with long brown hair, wearing a black blazer over a red top, speaking directly to the camera. Below the video frame is a dark grey feedback slider. The slider has a white horizontal bar with a red circular knob. Above the bar, the text "Strongly Dislike" is on the left, "72" is in the center, and "Strongly Like" is on the right. Below the bar, the numbers "0", "50 - Neutral", and "100" are positioned at the left, center, and right respectively.



100=Strongly Like



0=Strongly Dislike

# WHY DID PEOPLE 55-64 PUSH BACK?

“ [It was the] company’s expectations [for] everyone to return to the workspace regardless of how people felt. There was no choices. There was no options to work from home if the people can be productive. There was no special cases for people who have health issues.”

—Female 55-64

“THE COMPANY DOESN'T SEEM TO REALLY CARE ABOUT EMPLOYEES AND IS JUST COVERING THEIR ASSES.”

—Male, 55-64

# WHY DID THOSE UNDER 35 EMBRACE IT?

“I think that the video is very encouraging by helping people...  
be hopeful about the coronavirus.” —Female 18-34

“They can allow people [to] work from home if they have symptoms.”  
—Female 18-34

“She wants to make sure everyone is safe, and understands what to do when going  
back to work.” —Male 18-34

# QUESTIONS

- What questions do you have about these findings?
- What questions should we consider for wave 5?



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