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
JON LAST, PRESIDENT OF SPORTS & LEISURE RESEARCH GROUP
GINA DERICKSON, RESEARCH DIRECTOR OF ENGAGIOUS
CONTEXT: RESPONDENTS ACTIVELY ENGAGE

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

- Visit a retail store: 71%
- See a movie in a theater: 69%
- Visit a doctor’s office: 67%
- Attend a live sports event: 58%
- Travel 50+ miles and 1+ nights hotel: 53%
- Visit a dentist’s office: 45%
- Take a commercial flight: 43%
- Visit a theme park: 39%
- Visit a casino: 38%
- Take a cruise vacation: 28%
- Attend a conference or convention: 28%
- Attend an open house or tour a home listed for sale: 22%
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

<table>
<thead>
<tr>
<th>Date</th>
<th>Percent Who Strongly Agree</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sept. 28, 2001</td>
<td>50%</td>
</tr>
<tr>
<td>Apr. 1, 2020</td>
<td>35%</td>
</tr>
<tr>
<td>May 20, 2020</td>
<td>39%</td>
</tr>
</tbody>
</table>
WHERE WE STAND RIGHT NOW
SLIGHT UPTICK IN CONFIDENCE IN WAVE 4

Confidence Barometer

- Current Conditions: 25%, +1
- Future Expectations: 43%, +6

34%
WHAT ARE CONSUMERS MOST CONCERNED ABOUT?

PERSONAL

Potential to contract COVID-19

$49\%$ decrease

PERSONAL

Personal Finances

$46\%$ decrease

SOCIETAL

The overall public health crisis

$60\%$ decrease

SOCIETAL

The U.S. Economy

$64\%$ increase

*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?

<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Take a cruise</td>
<td>39%</td>
<td>53%</td>
<td>58%</td>
<td>66%</td>
</tr>
<tr>
<td>Attend a live sporting event</td>
<td>34%</td>
<td>37%</td>
<td>48%</td>
<td>60%</td>
</tr>
<tr>
<td>Stay at a hotel</td>
<td>39%</td>
<td>33%</td>
<td>47%</td>
<td>52%</td>
</tr>
<tr>
<td>Visit a casino</td>
<td>34%</td>
<td>37%</td>
<td>46%</td>
<td>47%</td>
</tr>
<tr>
<td>Fly commercially</td>
<td>32%</td>
<td>34%</td>
<td>43%</td>
<td>45%</td>
</tr>
<tr>
<td>See a movie in a theater</td>
<td>32%</td>
<td>35%</td>
<td>39%</td>
<td>48%</td>
</tr>
</tbody>
</table>

n=505, March-April 2020; n=547, May 6, 2020; n=593, May 20, 2020
SIZABLE % WOULD RETURN TOMORROW

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

<table>
<thead>
<tr>
<th>Activity</th>
<th>May 6, 2020</th>
<th>May 20, 2020</th>
</tr>
</thead>
<tbody>
<tr>
<td>Visit a retail store</td>
<td>66%</td>
<td>74%</td>
</tr>
<tr>
<td>Attend an open house or tour a home for sale</td>
<td>56%</td>
<td>65%</td>
</tr>
<tr>
<td>Attend a conference or convention</td>
<td>42%</td>
<td>48%</td>
</tr>
</tbody>
</table>

n=547, May 6, 2020; n=593, May 20, 2020
SIZABLE % WOULD RETURN TOMORROW

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

- Visit a doctor's office: 75%
- Visit a dentist's office: 65%
- Visit a theme park: 51%

n=593, Back to Normal Barometer, May 20, 2020
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: 48%
- Need a medical breakthrough: 31%
- Assurance Seekers: 21%
- 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: 21%
- 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: 31%

n=169, Back to Normal Barometer, May 20, 2020
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 (51%)
- Need a medical breakthrough (27%)
- Assurance Seekers (22%)
- 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.

n=231, Back to Normal Barometer, May 20, 2020
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 to go**: 52%
- **Need a medical breakthrough**: 28%
- **Assurance Seekers**: 20%
- **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.**

n=312, Back to Normal Barometer, May 20, 2020
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 to go**
- **Assurance Seekers 16%**
- **Need a medical breakthrough 24%**
- **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.**

n=344, Back to Normal Barometer, May 20, 2020
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**
- **Assurance Seekers**
  - 17%
- **Need a medical breakthrough**
  - 17%
- **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 RETAIL STORE

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

- Need a medical breakthrough: 14%
- Assurance Seekers: 12%
- Ready to go: 74%

- 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-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?

- Immediately: 17%
- Within three months: 12%
- Within two months: 21%
- Within six months to a year: 10%
- Within one month: 17%
- More than a year out: 7%

n=312, Back to Normal Barometer, May 20, 2020
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?

- Immediately: 20%
- Within one month: 22%
- Within two months: 22%
- Within three months: 14%
- Within 3-6 months: 8%
- Within six months to a year: 10%
- More than a year out: 4%

n=167, Back to Normal Barometer, May 20, 2020
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?

- Immediately: 16%
- Within one month: 26%
- Within two months: 16%
- Within three months: 14%
- Within 3-6 months: 15%
- Within six months to a year: 7%
- More than a year out: 6%

n=231, Back to Normal Barometer, May 20, 2020
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?

- Immediately: 28%
- Within one month: 22%
- Within two months: 13%
- Within three months: 11%
- Within 3-6 months: 11%
- Within six months to a year: 11%
- More than a year out: 3%

n=344, Back to Normal Barometer, May 20, 2020
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?

- Within one month: 25%
- Within two months: 13%
- Within three months: 9%
- Within 3-6 months: 9%
- Within six months to a year: 7%
- More than a year out: 3%

n=423, Back to Normal Barometer, May 20, 2020
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?

Within one month: 27%
Within two months: 24%
Within three months: 13%
Within 3-6 months: 9%
Within six months to a year: 5%
More than a year out: 4%
Immediately: 18%

n=169, Back to Normal Barometer, May 20, 2020
U.S. Travel
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.

**Males**
- Strongly support: 63%
- Near neutral: 31%
- Strongly oppose: 6%

**Females**
- Strongly support: 48%
- Near neutral: 33%
- Strongly oppose: 18%
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.

For Males:
- Strongly support: 56%
- Near neutral: 32%
- Strongly oppose: 12%

For Females:
- Strongly support: 34%
- Near neutral: 35%
- Strongly oppose: 31%
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

<table>
<thead>
<tr>
<th>Group</th>
<th>Percent who strongly agree</th>
</tr>
</thead>
<tbody>
<tr>
<td>Democrats</td>
<td>60%</td>
</tr>
<tr>
<td>Independents</td>
<td>54%</td>
</tr>
<tr>
<td>Republicans</td>
<td>53%</td>
</tr>
</tbody>
</table>
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

![Bar Chart]

- **Democrats**: 60%
- **Independents**: 54%
- **Republicans**: 53%
- **Under 35**: 45%
- **35-64**: 42%
- **65+**: 78%

n=504, Back to Normal Barometer, May 20, 2020
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

- Democrats: 26%
- Independents: 21%
- Republicans: 24%
- Under 35: 26%
- 35-64: 24%
- 65+: 8%

n=504, Back to Normal Barometer, May 20, 2020
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?

Males
- One’s employer: 3%
- Oneself: 18%
- Schools: 7%
- Entities that provide products and services (restaurants, retailers, theaters, airlines, sports venues, hotels, etc.): 14%
- Their local government: 10%
- The federal government: 48%

Females
- One’s employer: 6%
- Oneself: 31%
- Schools: 6%
- Entities that provide products and services (restaurants, retailers, theaters, airlines, sports venues, hotels, etc.): 9%
- Their local government: 18%
- The federal government: 30%

n=729, Back to Normal Barometer, May 20, 2020
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

- Strongly agree: 45%
- Neutral: 37%
- Strongly disagree: 18%

n=593, Back to Normal Barometer, May 20, 2020
...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?

n=504, Back to Normal Barometer, May 20, 2020
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?

Percent very likely to sue

- ALL: 26%
- Male: 40%
- Ready to Go: 32%
- Under 35: 27%
- Liberal: 29%
- Northeast: 34%

n=202, Back to Normal Barometer, May 20, 2020
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?

<table>
<thead>
<tr>
<th>Group</th>
<th>Percent Likely to Sue</th>
</tr>
</thead>
<tbody>
<tr>
<td>ALL</td>
<td>26%</td>
</tr>
<tr>
<td>Male</td>
<td>35%</td>
</tr>
<tr>
<td>Ready to Go</td>
<td>32%</td>
</tr>
<tr>
<td>Under 35</td>
<td>27%</td>
</tr>
<tr>
<td>Liberal</td>
<td>29%</td>
</tr>
<tr>
<td>Northeast</td>
<td>32%</td>
</tr>
</tbody>
</table>
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?

<table>
<thead>
<tr>
<th>Precaution</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Requiring guests/customers to wear face masks</td>
<td>41%</td>
</tr>
<tr>
<td>Requiring physical distancing of 6+ feet at all times</td>
<td>39%</td>
</tr>
<tr>
<td>Requiring customer facing staff to wear face masks</td>
<td>38%</td>
</tr>
<tr>
<td>Providing ample hand sanitizer for guests</td>
<td>33%</td>
</tr>
<tr>
<td>Visible and frequent cleaning of all public areas by property staff</td>
<td>33%</td>
</tr>
<tr>
<td>Entry point temperature checks using thermal cameras</td>
<td>33%</td>
</tr>
<tr>
<td>Providing disinfectant wipes for guests</td>
<td>32%</td>
</tr>
<tr>
<td>Assurance that customer facing employees are required to be tested for COVID-19</td>
<td>30%</td>
</tr>
</tbody>
</table>
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?

- Plexiglass dividers or "sneeze guards" at all concession/food service areas 29%
- Visible and frequent cleaning of all public areas by professional cleaning service 29%
- Denial of entry to all customers/guests with a fever 29%
- Reduced/reconfigured seating to accommodate social distancing 29%
- Placement of health and hygiene reminders throughout 24%
- Prominent listing of sanitization practices being implemented by the property 23%
- Displaying a certificate issued by a local medical authority that the space has passed all sanitization protocols 21%
- Entry point nasal swabbing 13%

n=572, Back to Normal Barometer, May 20, 2020
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.
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?
Ron Bonjean, ron@rokksolutions.com
Rich Thau, rich@engagious.com
Jon Last, jlast@sportsandleisureresearch.com
Gina Derickson, gina.derickson@engagious.com