MANEUVERING AROUND UNCERTAINTY

Public opinion insights from the July 8, 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

- Visit a retail store: 67%
- Visit a doctor’s office: 65%
- See a movie in a theater: 61%
- Attend a live sports event: 49%
- Travel 50+ miles and 1+ nights hotel: 48%
- Visit a dentist’s office: 47%
- Take a commercial flight: 36%
- Visit a casino: 31%
- Visit a theme park: 28%
- Essential services done in home: 25%
- Non-essential services done in home: 22%
- Attend a conference or convention: 19%
- Take a cruise vacation: 17%
- Attend an open house for a home listed for sale: 14%
- Tour a home listed for sale (outside of an open house): 13%
GROWING NUMBERS ENGAGED IN PAST MONTH

Percent who have participated in this activity in the past month

- Visit a retail store: 59%
- Visit a doctor's office: 30%
- Eat at a restaurant: 30%
- Visit a dentist's office: 20%
- Had an essential service provider perform services: 20%
- Had any non-essential services performed: 17%
- Exercise at a gym: 15%
- Visit a casino: 12%
- Tour a home listed for a sale (outside of an open house): 11%
- Travel 50+ miles and 1+ nights hotel: 11%
- Attend an open house for a home listed for sale: 8%
- Take a commercial flight: 5%
- See a movie in a theater: 4%

n=598, Back to Normal Barometer, July 8, 2020
FUTURE EXPECTATIONS FUEL MODEST CONFIDENCE UPTICK

Confidence Barometer

Future Expectations

Current Conditions

29%

-1

23%

+2

+5

35%

Wave 7: n=598, Back to Normal Barometer – July 8, 2020
Wave 6: n=565, Back to Normal Barometer – June 17, 2020
There are no significant differences in confidence between the “COVID-19 Heavy” states versus “COVID-19 Light” states.
SOCIETAL CONCERNS STILL DOMINATE

PERSONAL

- Potential to contract COVID-19: 49% increase (9-week high)
- The overall public health crisis: 61% increase (9-week high)

SOCIETAL

- Personal Finances: 45% increase
- The U.S. Economy: 60% increase
- Impact on leisure activities: 44% increase
- Impact on American society: 57% increase

*Percentage who said they are extremely concerned
Wave 7: n=598, Back to Normal Barometer, July 8, 2020
Wave 6: n=565 Back to Normal Barometer – June 17, 2020
COVID-HEAVY AREAS ARE EVEN MORE CONCERNED

**PERSONAL**

**MEDICAL**
- Potential to contract COVID-19
  - Heavy: 56%
  - Light: 45%
- The overall public health crisis
  - Heavy: 62%
  - Light: 59%

**SOCIETAL**

**$$$$**
- Personal Finances
  - Heavy: 51%
  - Light: 41%
- The U.S. Economy
  - Heavy: 63%
  - Light: 57%

**UNREST**
- Impact on leisure activities
  - Heavy: 44%
  - Light: 43%
- Impact on American society
  - Heavy: 60%
  - Light: 53%

*Percentage who said they are extremely concerned
Wave 7: n=598, Back to Normal Barometer, July 8, 2020
Wave 6: n=565 Back to Normal Barometer – June 17, 2020*
TALES OF THREE VERY DIFFERENT INDEPENDENCE DAY WEEKENDS

Greg: Eager to go

Steve: Careful to go

Jocelyn: Unwilling to go
They’re worried about a second wave...

I'm concerned that there will be a second wave of COVID-19 outbreak, requiring event cancellations and lockdowns this fall.

COVID-Heavy States

- Strongly agree: 64%
- Somewhat agree: 16%
- Somewhat disagree: 10%
- Strongly disagree: 10%

COVID-Light States

- Strongly agree: 59%
- Somewhat agree: 22%
- Somewhat disagree: 7%
- Strongly disagree: 12%
...AND IT’S UNDERMINING THEIR WILLINGNESS TO TRAVEL

The possibility of a second wave of COVID-19 cases is affecting my willingness to travel in coming months.

COVID-Heavy States

- Strongly disagree: 18%
- Somewhat disagree: 13%
- Somewhat agree: 14%
- Strongly agree: 55%

COVID-Light States

- Strongly disagree: 15%
- Somewhat disagree: 7%
- Somewhat agree: 16%
- Strongly agree: 62%

n=217, Back to Normal Barometer, July 8, 2020
I'm concerned about losing my job or being furloughed.
THEY’RE WORRIED WE’RE REOPENING TOO QUICKLY

I'm concerned that we are moving too quickly in opening up businesses in the U.S.

COVID-Heavy States
- Strongly agree: 58%
- Somewhat agree: 12%
- Somewhat disagree: 14%
- Strongly disagree: 16%

COVID-Light States
- Strongly agree: 53%
- Somewhat agree: 16%
- Somewhat disagree: 15%
- Strongly disagree: 16%
AND THEY’RE WORRIED THEY’RE NOT GETTING CLEAR GUIDANCE

When it comes to avoiding COVID-19, I feel like I’m getting mixed messages from people in the...
AMIDST WORRY, YOU NEED TO HAVE THEIR BACKS

• Wisdom, certainty, and trust are in short supply

• Americans don’t believe others are being as diligent in their adherence to safety protocols as they are

• In the absence of clear guidance, one’s confidence to re-engage is tied to an ability to control the health risk of a given experience

• Your challenge: Can you enhance the semblance of personal control? Can you provide the certainty people crave?
   Message: “You don’t have to worry about others’ behavior; we’ve got you covered.”
EXAMPLE OF GIVING CERTAINTY & GETTING IT RIGHT

“At the hotel, they did the extra guidelines and took the effort to have extra cleaning, make sure [there was] spacing. The staff and everyone was wearing masks. It had a pool [at] the place that we stayed, and they had it set up that you would schedule your time there. That way people weren’t interacting too much. It’s kind of what I was expecting that they would do in a case like that. [Their attitude was,] ‘We’re going to try and stay open, but we’re going to follow the guidelines how we’re supposed to.’ It was a great experience overall.” – Nick (Male, age 36, California)
DECLINING % WOULD RETURN TOMORROW

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

- Essential services done in home
- Visit a retail store
- Visit a doctor’s office
- Non-essential services done in home
- Visit a dentist’s office
- Tour a home listed for sale (outside of an open house)
- Attend an open house for a home for sale
- Take a cruise
- Stay at a hotel
- Visit a theme park
- Visit a casino
- Attend a conference or convention
- Attend a live sporting event
- Fly commercially
- See a movie in a theater

n=598, Back to Normal Barometer, July 8, 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

- Recently Active: 11%
- Ready to go: 36%
- Assurance Seekers: 19%
- Need a medical breakthrough: 34%

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

- **Need a medical breakthrough**: 38%
- **Assurance Seekers**: 16%
- **Ready to go**: 46%

**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.

n=165, Back to Normal Barometer, July 8, 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**: 48%
- **Need a medical breakthrough**: 38%
- **Assurance Seekers**: 14%
- **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=99, Back to Normal Barometer, July 8, 2020
READY OR NOT: VISIT A RETAIL STORE

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

- Recently Active: 58%
- Ready to go: 24%
- Need a medical breakthrough: 10%
- Assurance Seekers: 8%

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.
WITH ASSURANCES, 65% 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: 20%
- Within one month: 18%
- Within two months: 14%
- Within six months to a year: 14%
- Within 3-6 months: 9%
- More than a year out: 12%

n=286, Back to Normal Barometer, July 8, 2020
WITH ASSURANCES, 53% 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: 12%
- Within one month: 14%
- Within two months: 16%
- Within three months: 11%
- Within six months to a year: 14%
- More than a year out: 15%
- Within 3-6 months: 18%

n=165, Back to Normal Barometer, July 8, 2020
WITH ASSURANCES, 45% 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: 12%
- Within one month: 16%
- Within two months: 11%
- Within three months: 6%
- Within six months to a year: 16%
- More than a year out: 22%
- Within 3-6 months: 17%

Down from 50% in Wave 1

n=99, Back to Normal Barometer, July 8, 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..... Visit a retail store?

- Immediately: 42%
- Within one month: 23%
- Within two months: 10%
- Within three months: 7%
- Within 3-6 months: 8%
- Within six months to a year: 6%
- More than a year out: 4%

n=402, Back to Normal Barometer, July 8, 2020
1/3 LIKELY TO PLAN/BOOK/TAKE A SUMMER TRIP

I'm likely to ______ a trip this summer requiring travel of more than 50 miles and at least one night in a hotel or other paid lodging.
Which of the following applies to the Fourth of July weekend just completed?

- 63% stayed at home for the full holiday weekend
- 17% cancelled or altered my travel plans from what I was originally intending to do
- 15% stayed overnight in a private home or residential unit, 50+ miles from my primary residence
- 10% traveled more than 50 miles from home
- 9% stayed overnight in paid lodging or a hotel

n=598, Back to Normal Barometer, July 8, 2020
MANY ALTERED PLANS TO AVOID CASES, MASKS OR UNREST

Which if any of the following affected your Fourth of July weekend travel plans?

- 54% I altered my plans to avoid areas that were showing increased cases of COVID-19
- 40% I altered my plans to avoid areas where the wearing of masks or facial coverings was required in public places
- 34% I altered my plans to avoid areas where I was concerned that social unrest might inhibit activities that I enjoy
- 10% None of the above

n=94, Back to Normal Barometer, July 8, 2020
**BIGGEST CITIES ARE THE MOST LIKELY ONES TO BE AVOIDED**

Which of the following markets, if any, would you NOT travel to this summer because of COVID-19 or social unrest concerns specifically?

<table>
<thead>
<tr>
<th>City</th>
<th>Avoidance Rate</th>
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<tbody>
<tr>
<td>New York</td>
<td>34%</td>
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<tr>
<td>Chicago</td>
<td>28%</td>
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<td>San Francisco</td>
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<td>Los Angeles</td>
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<td>Detroit</td>
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<td>Washington, DC</td>
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<td>Las Vegas</td>
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<td>Phoenix</td>
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<td>San Antonio</td>
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<td>Houston</td>
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<td>Austin</td>
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<td>San Diego</td>
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<td>None</td>
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<td>Boston</td>
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<td>Jacksonville</td>
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<td>Indianapolis</td>
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<tr>
<td>Denver</td>
<td>17%</td>
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</tbody>
</table>

n=598, Back to Normal Barometer, July 8, 2020
It is easy to get information I need about the health and safety conditions where I plan to travel.

- Strongly agree: 70%
- Somewhat agree: 21%
- Somewhat disagree: 8%
- Strongly disagree: 1%
THERE ARE LOTS OF REASONS TO NOT TAKE A SUMMER TRIP

There's no point in spending money on a summer vacation if......

- 67% people are not protecting their own health there
- 66% lots of sites and attractions are closed
- 59% lots of restaurants are closed
- 54% it's going to be like lockdown at home, but only a bit more scenic
- 53% social unrest might break out there
- 43% the economy remains so weak
- 42% one cannot go swimming
- 36% it requires social distancing
- 33% it requires a mask

n=598, Back to Normal Barometer, July 8, 2020
QUESTIONS

• What questions do you have for us?

• What questions should we ask in wave 8?
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