

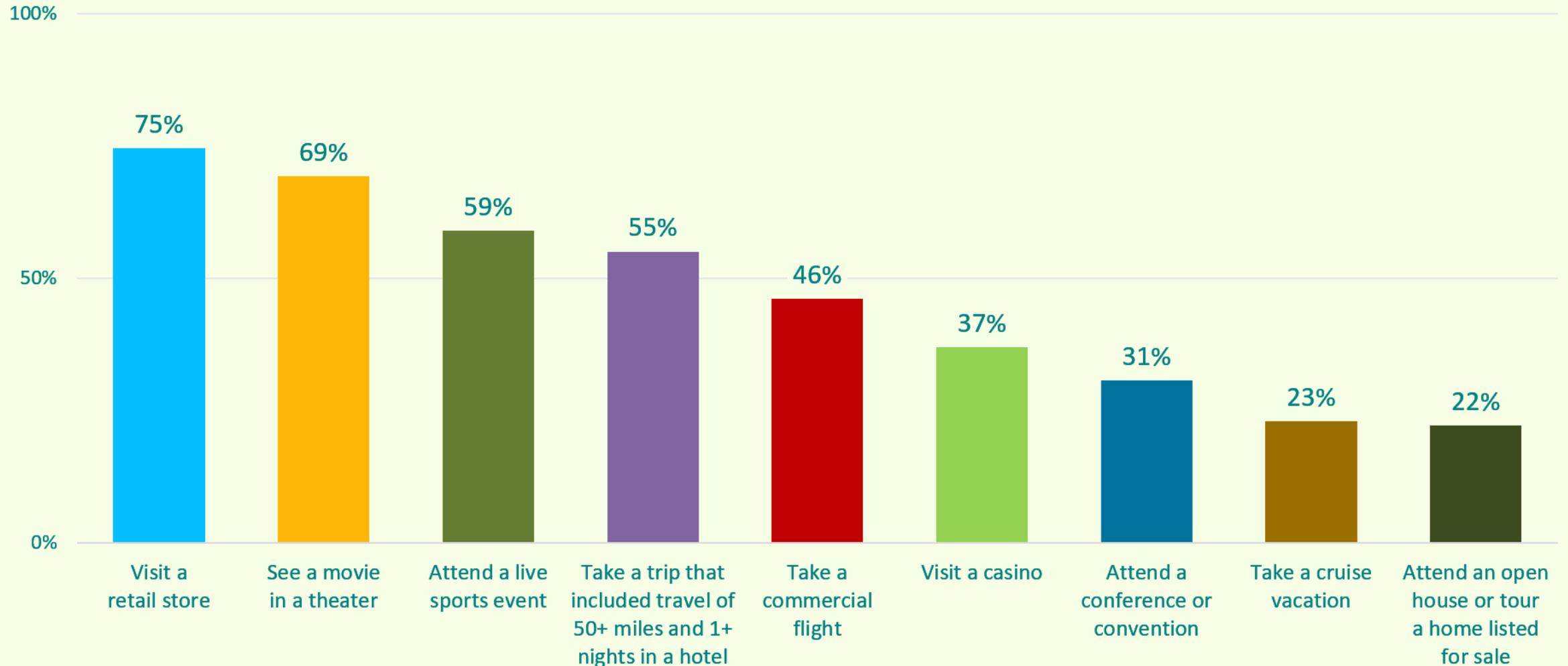
AMERICA APPROACHES AN INFLECTION POINT

Key findings from the May 6, 2020 Back-to-Normal Barometer

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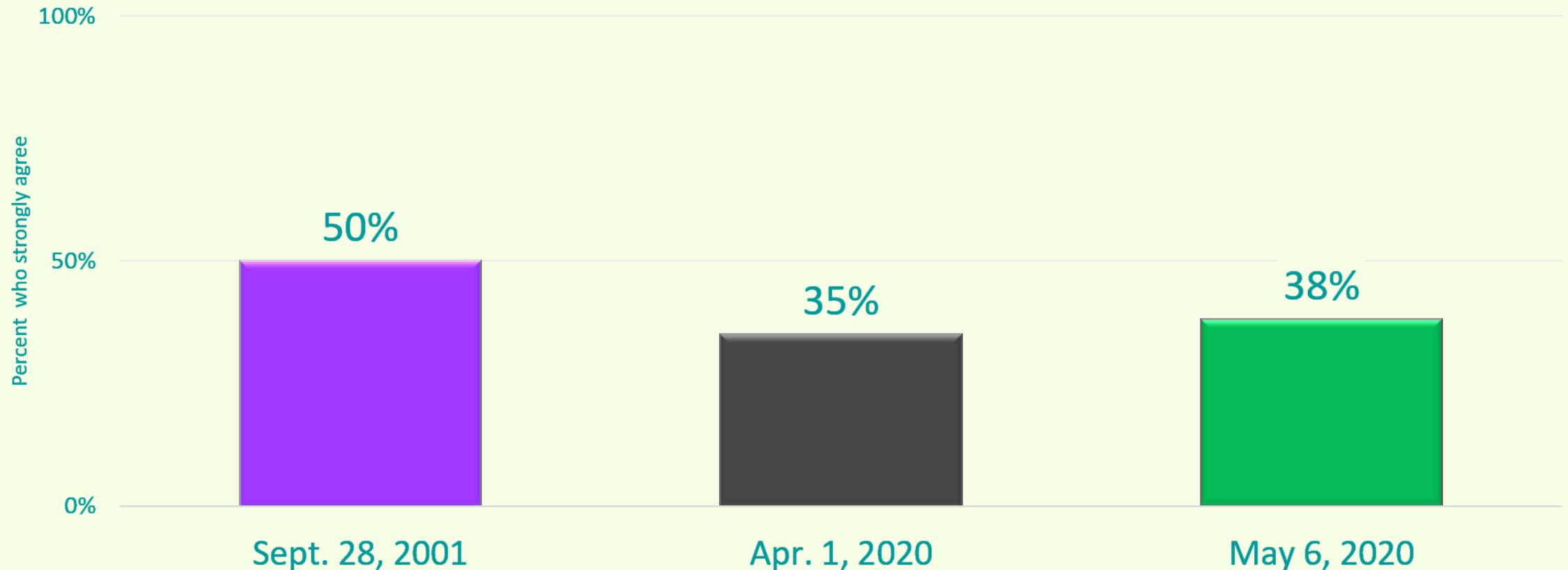
CONTEXT: RESPONDENTS ACTIVELY ENGAGE

In which of the following leisure activities have you participated over the past 12 months?



A TOUGHER ENVIRONMENT THAN 9/11

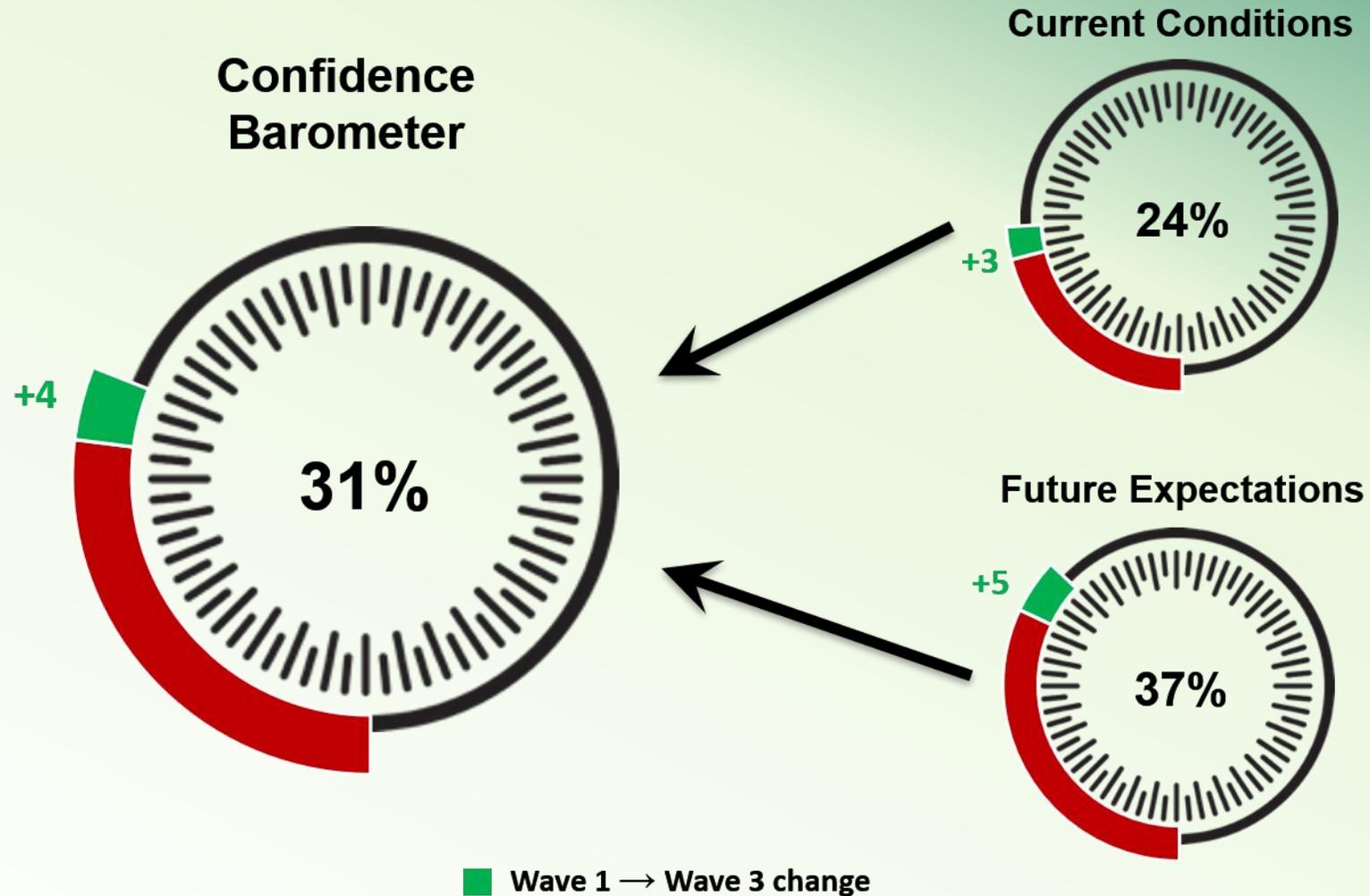
Taking a vacation of over 500 miles is a priority for me and my family in the next 12 months



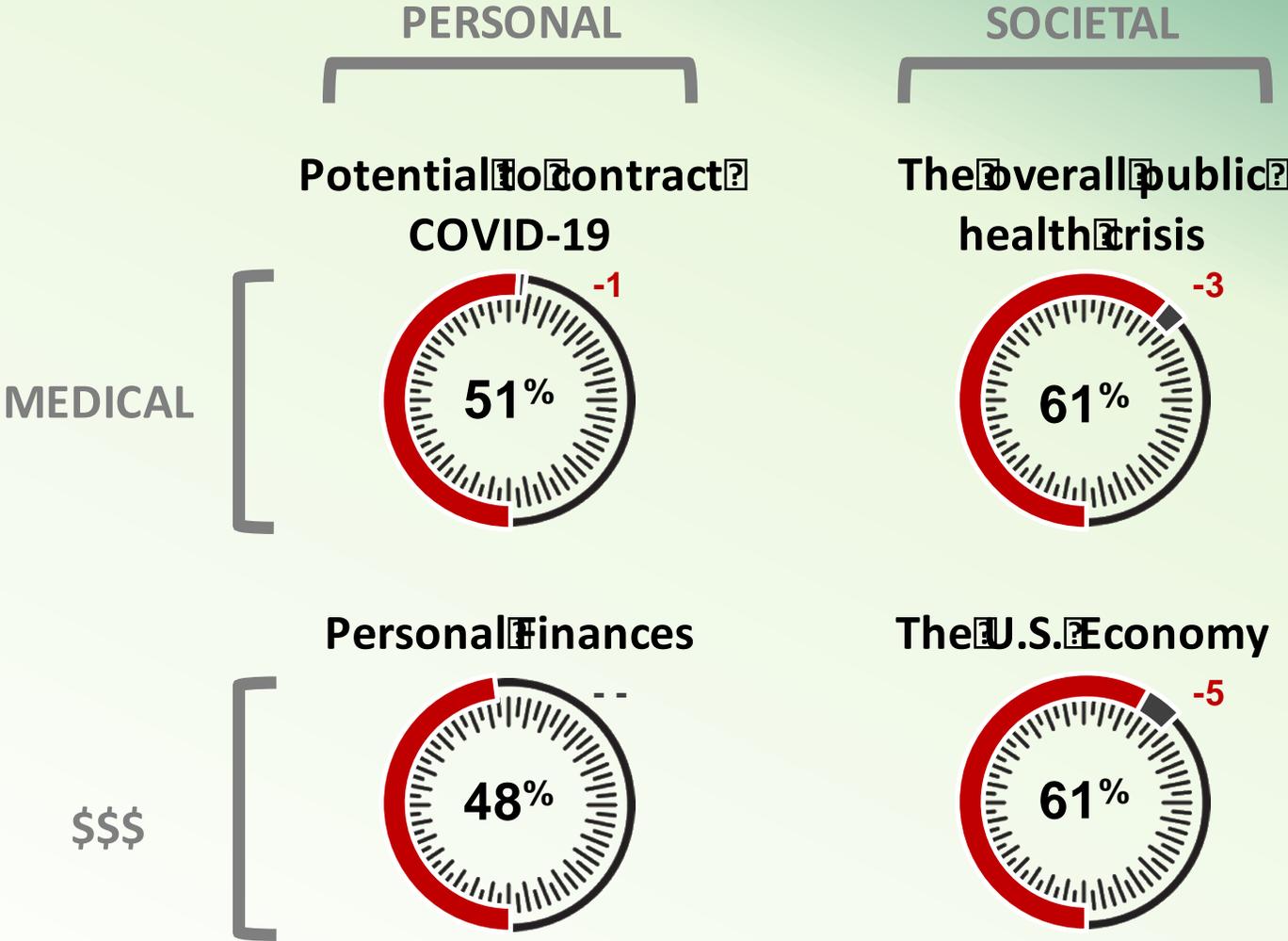
WHERE WE STAND RIGHT NOW



A SLIGHT UPTICK IN CONFIDENCE...GOES FLAT



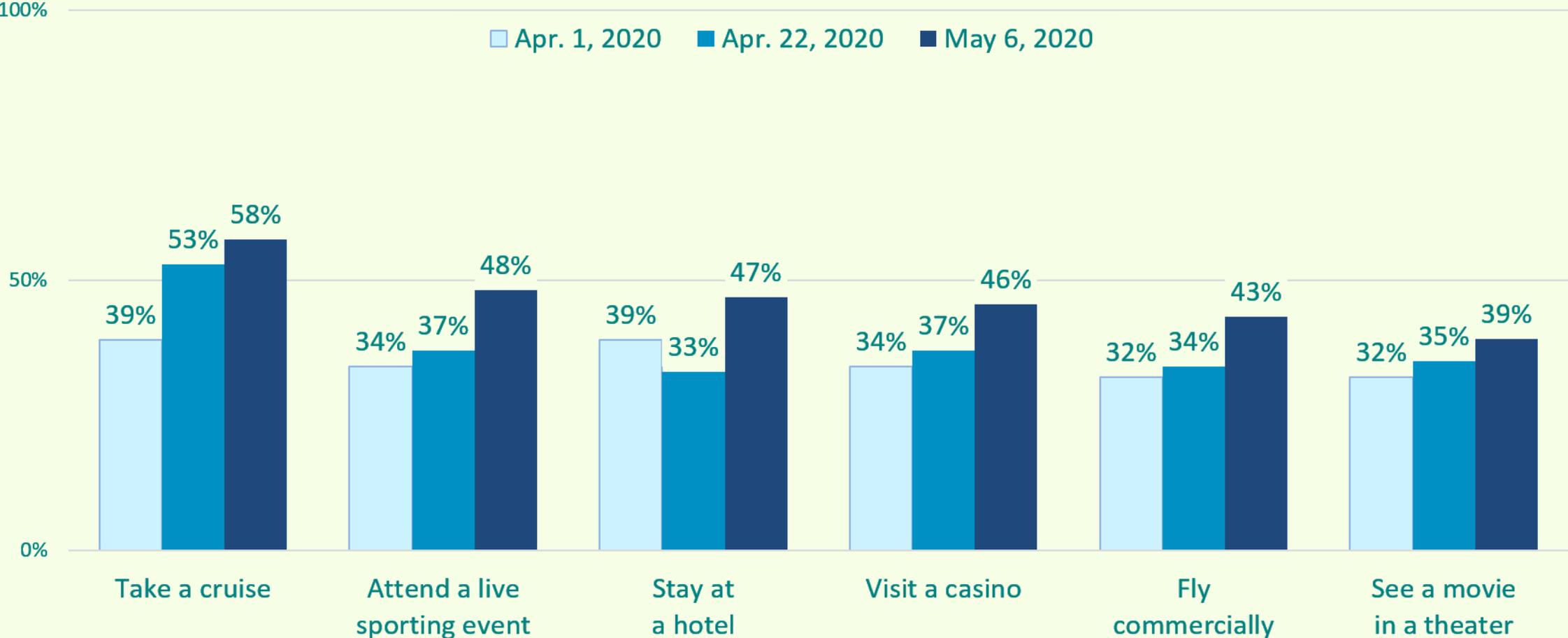
MATRIX OF CONCERNS



*Percentage who said they are extremely concerned
 Wave 2: n=518 Back to Normal Barometer - April 22, 2020
 Wave 3: n=547 Back to Normal Barometer - May 6, 2020

NEARLY HALF WOULD RETURN RIGHT NOW

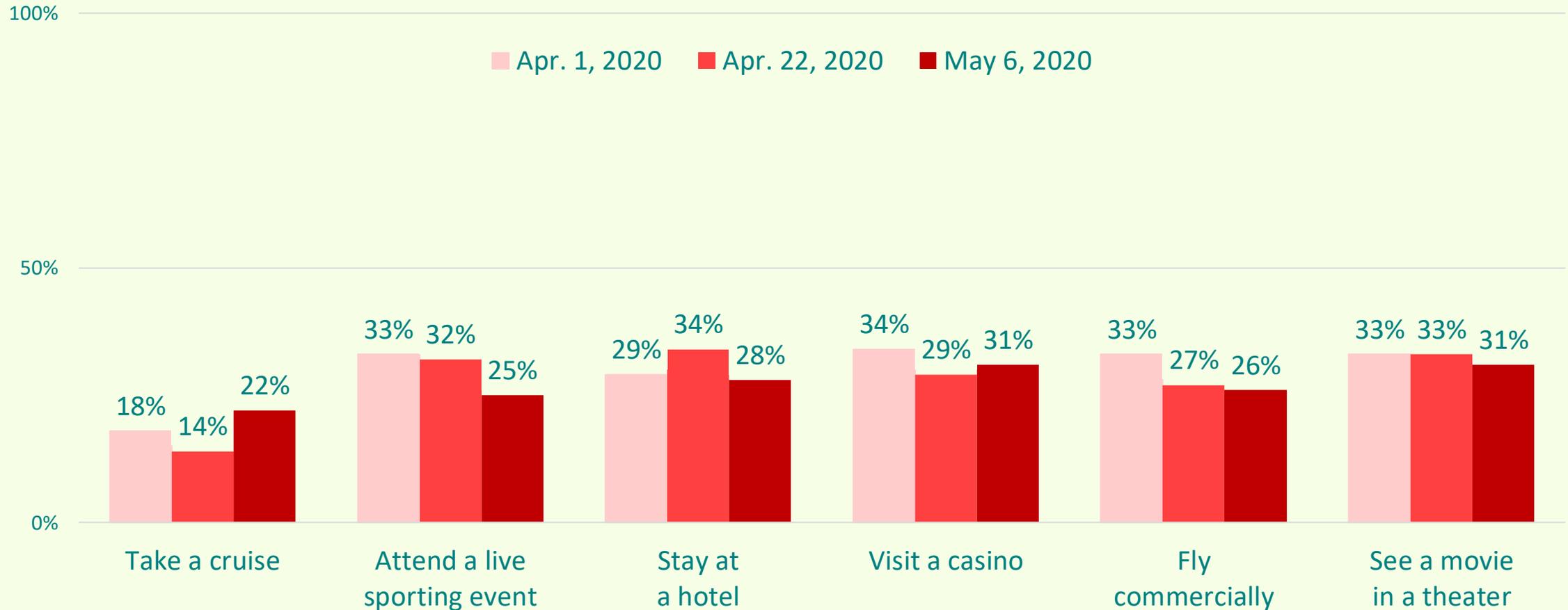
Are you currently willing to engage in the following activities, without hesitation?



n=505, Back to Normal Barometer, March-April 2020, n=547, Back to Normal Barometer, May 6, 2020

1/4 UNWILLING TO BUDGE FOR MONTHS

Percentage of respondents who require a vaccine or treatment for COVID-19 in order to re-engage

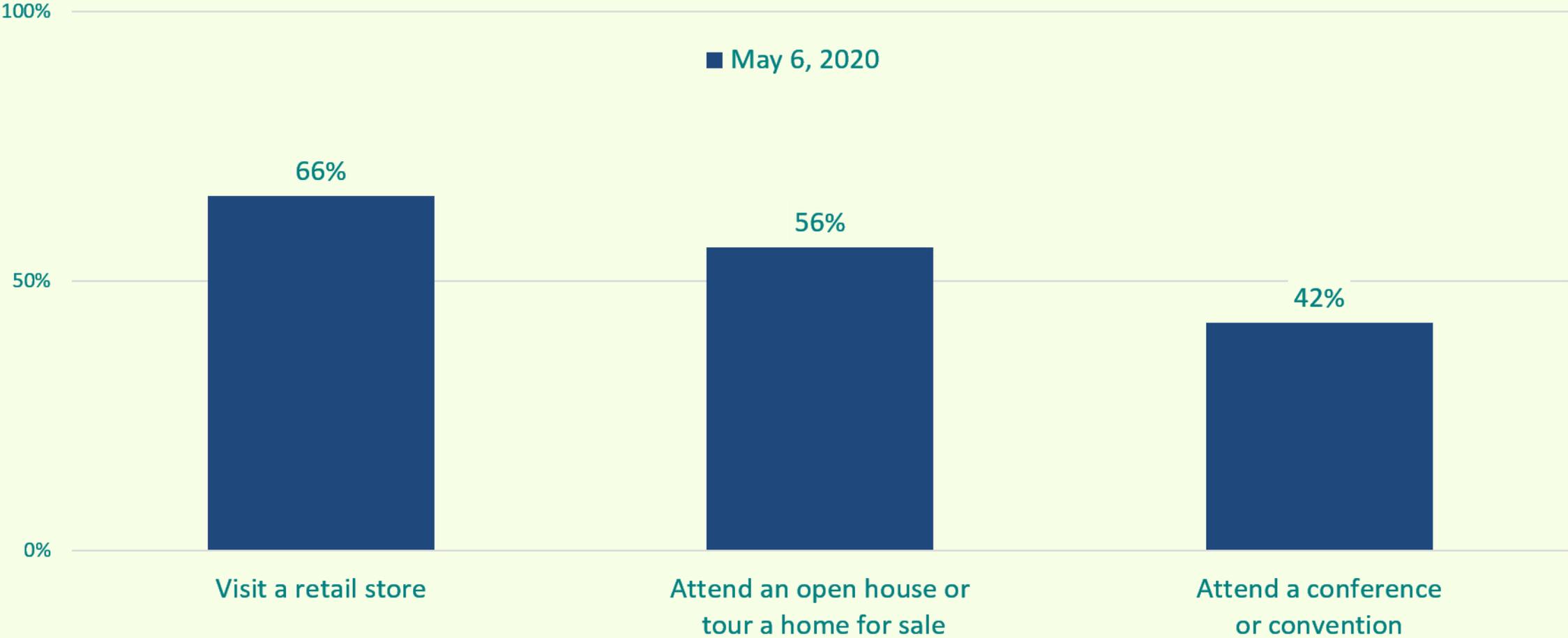


ASSURANCE ARCHETYPES

	<u>DEMOS</u>	<u>LIFESTYLE</u>
Ready To Go	Men 35-to-44 Northeast, West	Very liberal, Very conservative Business travelers
Assurance Seekers		Somewhat liberal
Cautious and Fearful	Women 45+ Midwest	Democrat, Leisure travelers

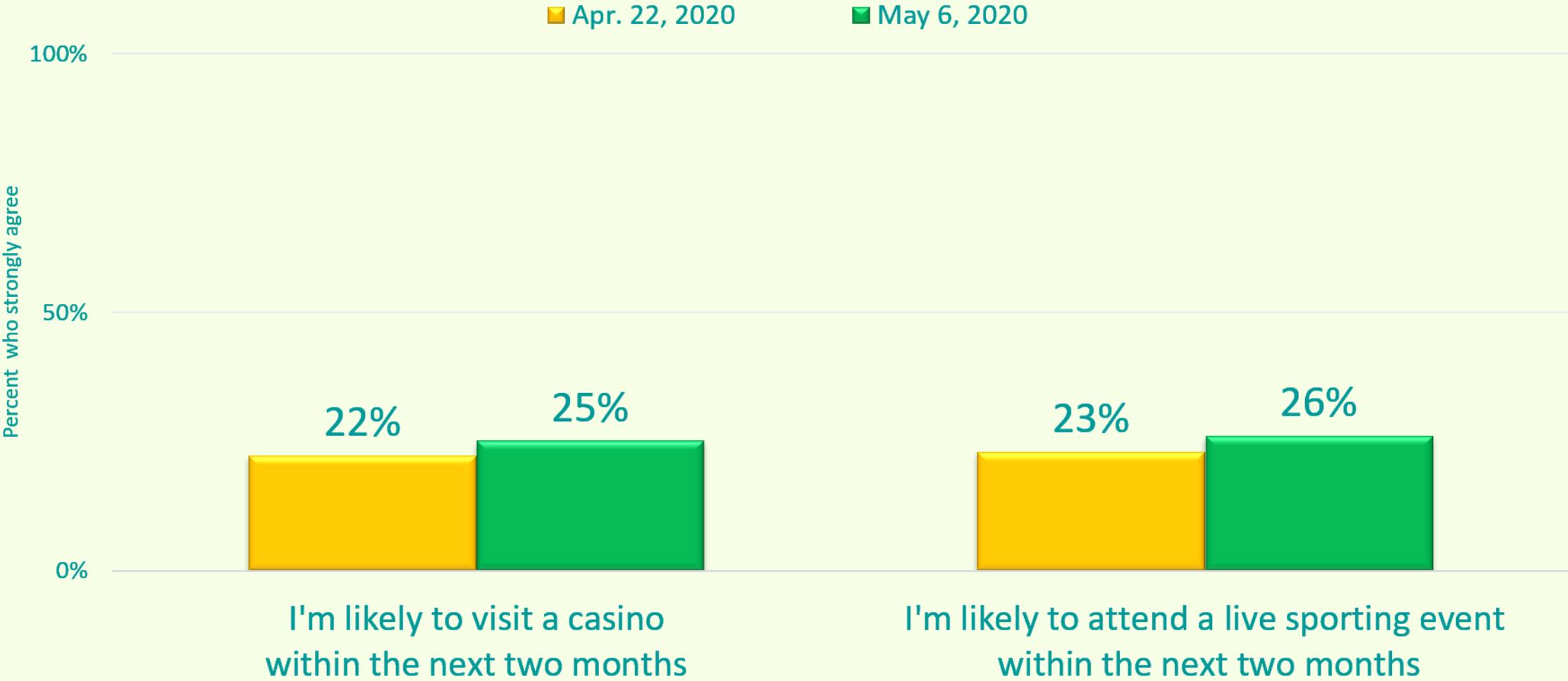
MANY WOULD RETURN RIGHT NOW

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



n=547, Back to Normal Barometer, May 6, 2020

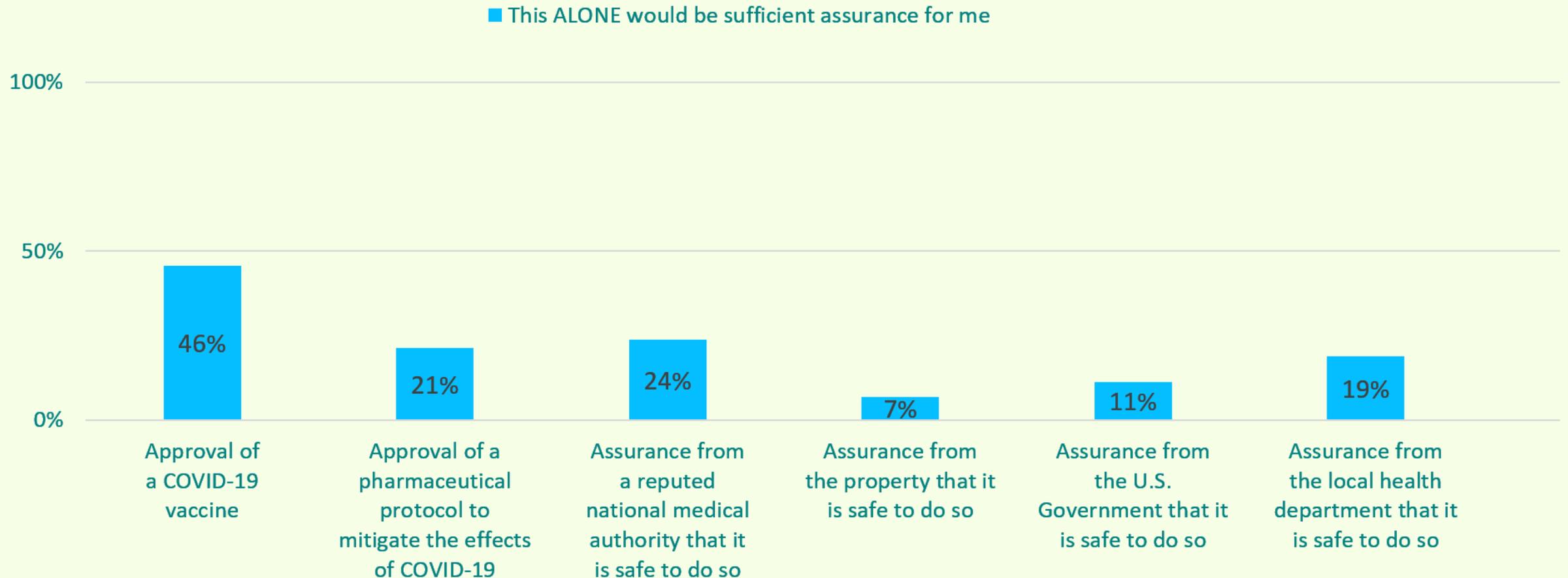
READY TO GO, BUT NOT EXPECTING TO GO



Hotels

SOME ASSURANCES MATTER A LOT

Which of these singular occurrences (alone or in conjunction with something else) would make you comfortable to stay at a hotel or resort, without hesitation?



MORE THAN ONE ASSURANCE IS VITAL

Which of these singular occurrences (alone or in conjunction with something else) would make you comfortable to stay at a hotel or resort, without hesitation?

- This ALONE would be sufficient assurance for me
- I would need this occurrence/condition PLUS at least one other item on this list



FOR SOME, ASSURANCES ARE WORTHLESS

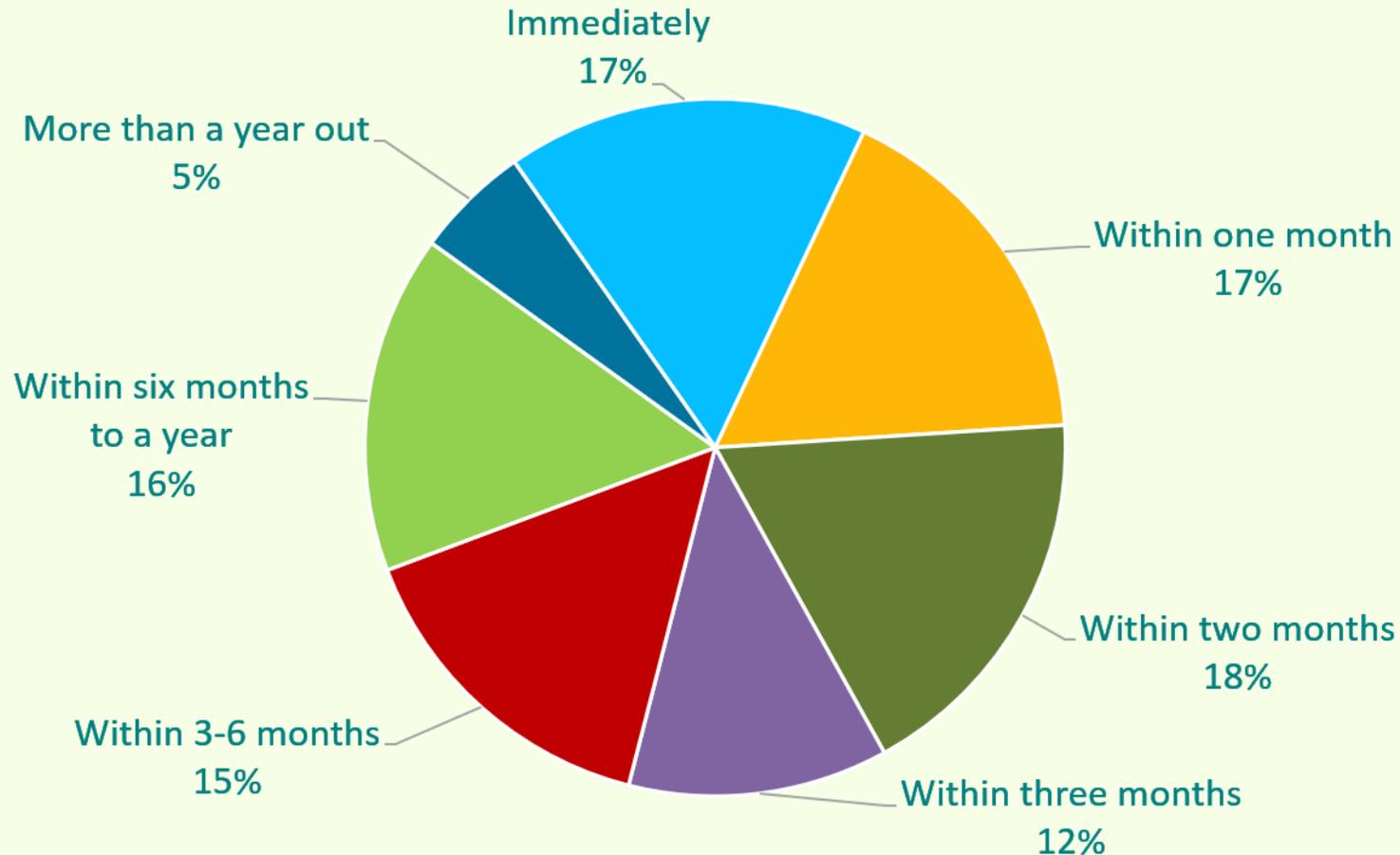
Which of these singular occurrences (alone or in conjunction with something else) would make you comfortable to stay at a hotel or resort, without hesitation?

- This would NOT EVEN PARTIALLY impact my decision one way or another
- I would need this occurrence/condition PLUS at least one other item on this list
- This ALONE would be sufficient assurance for me



WITH ASSURANCES, 64% RETURN IN 3 MONTHS

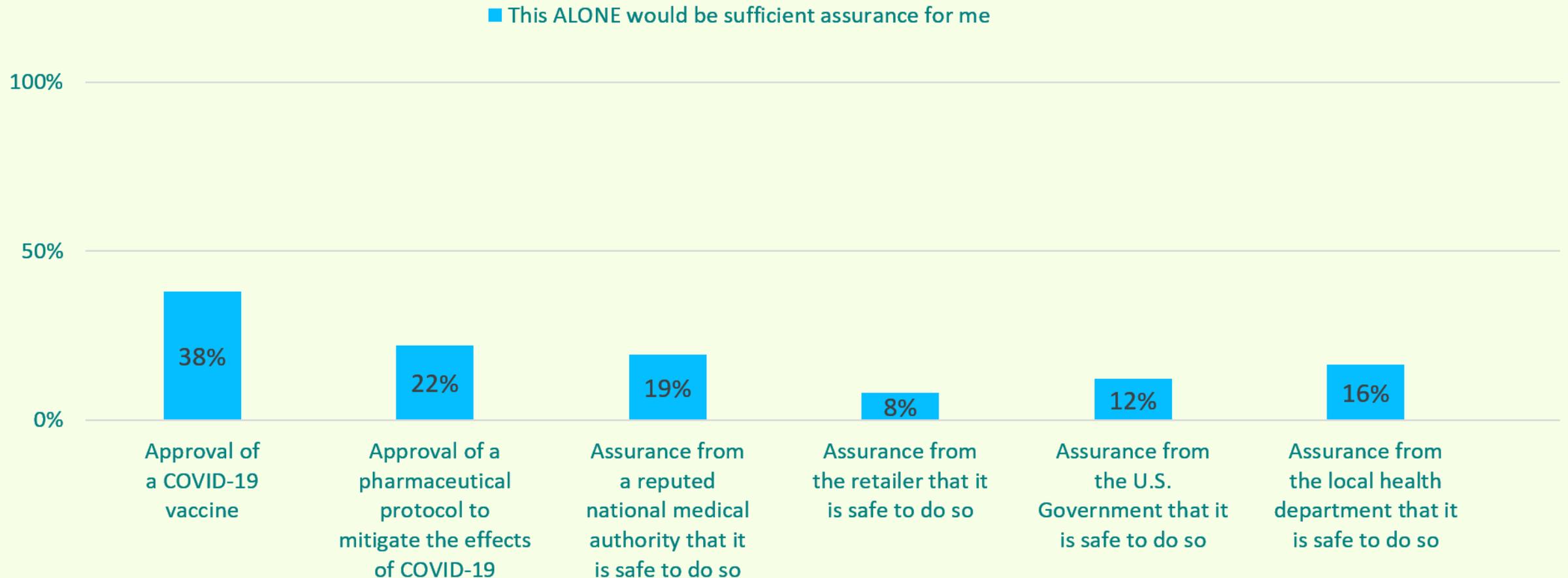
Assuming you had the necessary assurances that it was safe to resume normal activities, how quickly would you next.... Take a trip that included travel of 50 miles or more and 1+ nights in a hotel or other paid lodging?



Retail Stores

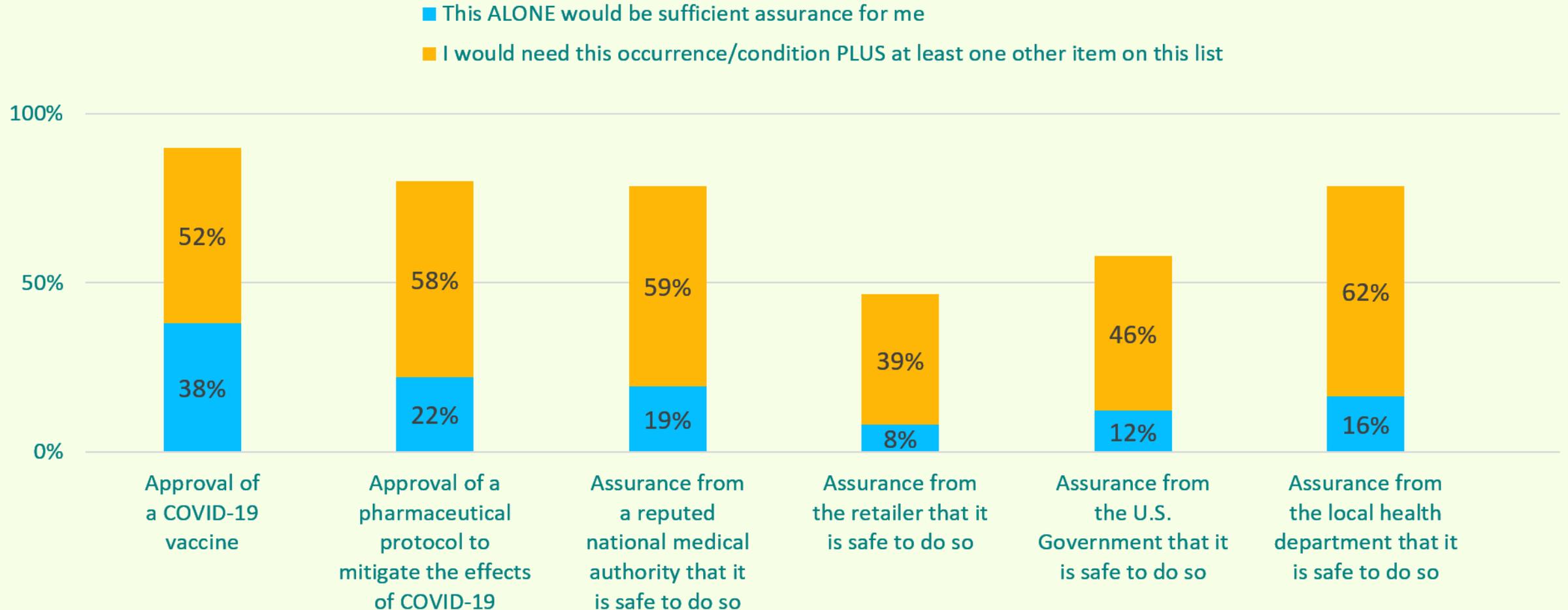
SOME ASSURANCES MATTER A LOT

Which of these singular occurrences (alone or in conjunction with something else) would make you comfortable visiting a retail store, without hesitation?



MORE THAN ONE ASSURANCE IS VITAL

Which of these singular occurrences (alone or in conjunction with something else) would make you comfortable visiting a retail store, without hesitation?



SOME ASSURANCES ARE WORTHLESS

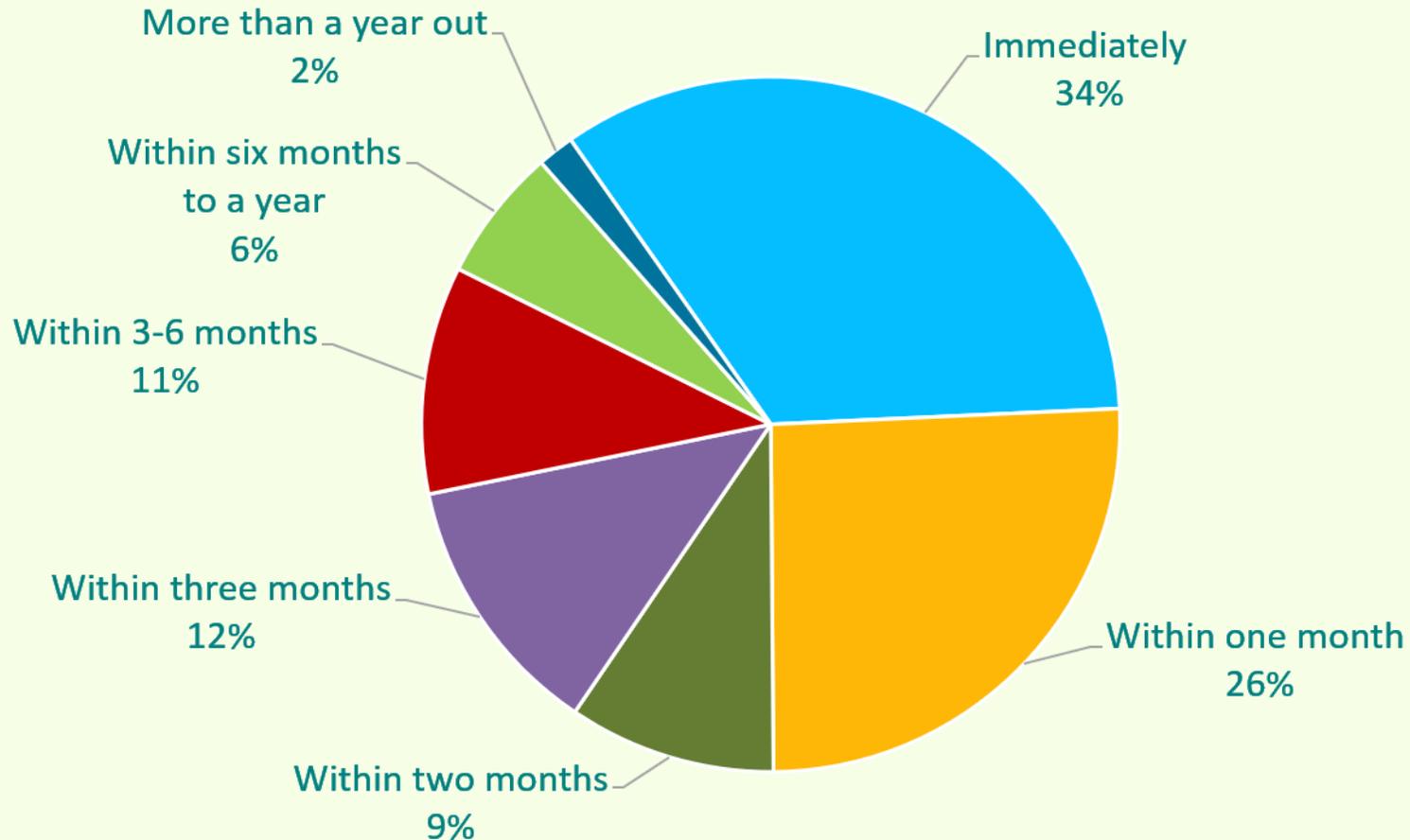
Which of these singular occurrences (alone or in conjunction with something else) would make you comfortable visiting a retail store, without hesitation?

- This would NOT EVEN PARTIALLY impact my decision one way or another
- I would need this occurrence/condition PLUS at least one other item on this list
- This ALONE would be sufficient assurance for me



WITH ASSURANCES, 81% RETURN IN 3 MONTHS

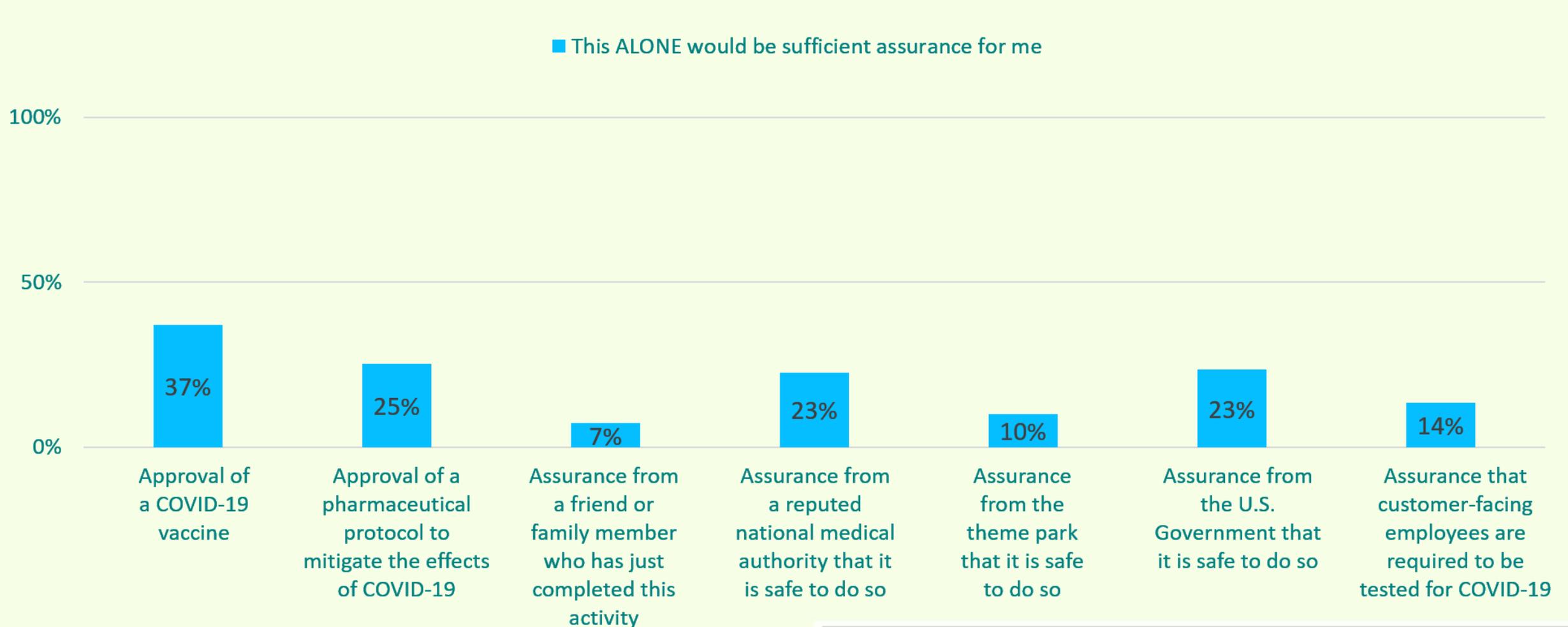
Assuming you had the necessary assurances that it was safe to resume normal activities, how quickly would you next.... Visit a retail store?



Theme Parks

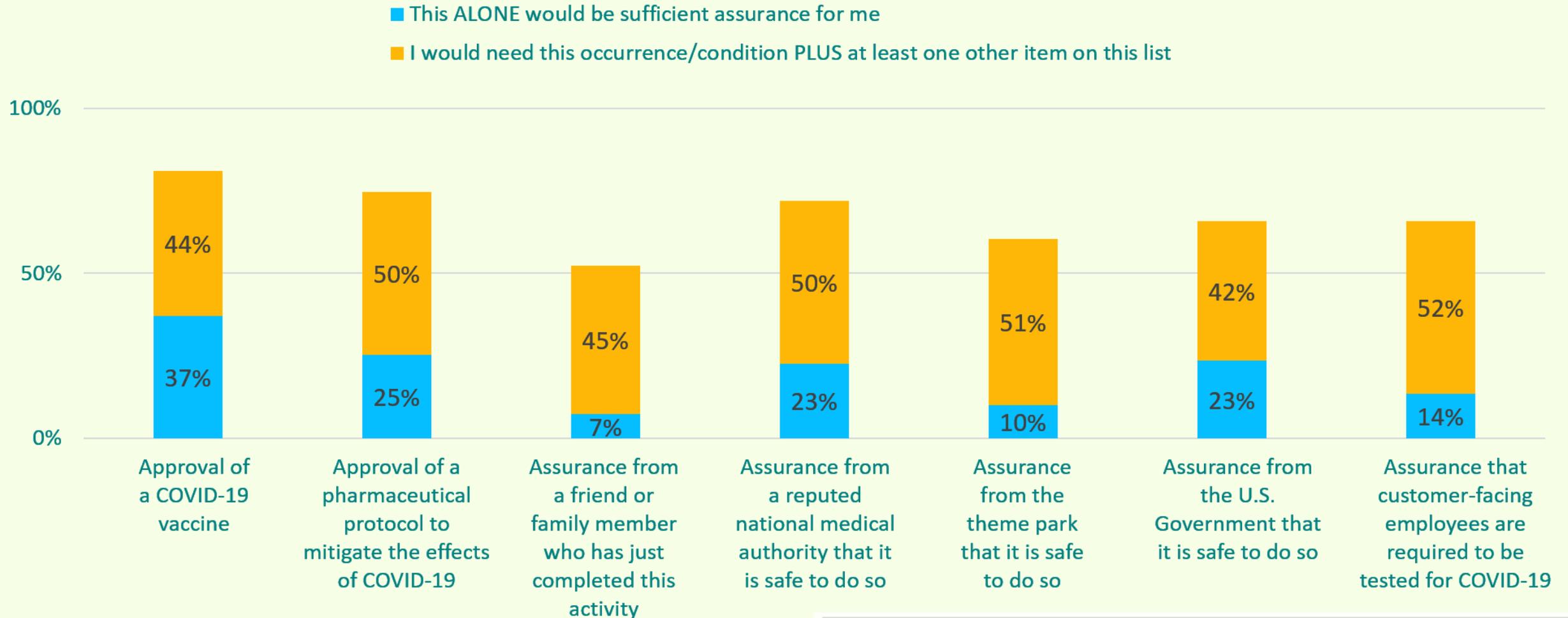
THEME PARKS

Which of these singular occurrences (alone or in conjunction with something else) would make you would make you comfortable to visit a theme park, without hesitation?



THEME PARKS

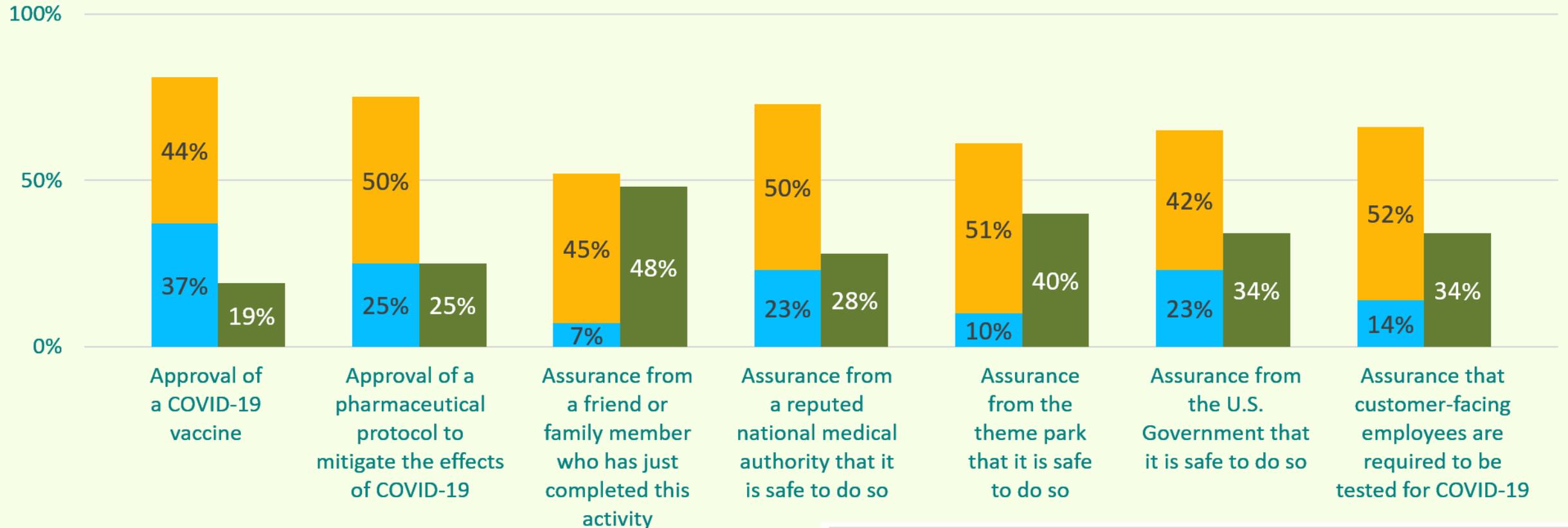
Which of these singular occurrences (alone or in conjunction with something else) would make you would make you comfortable to visit a theme park, without hesitation?



THEME PARKS

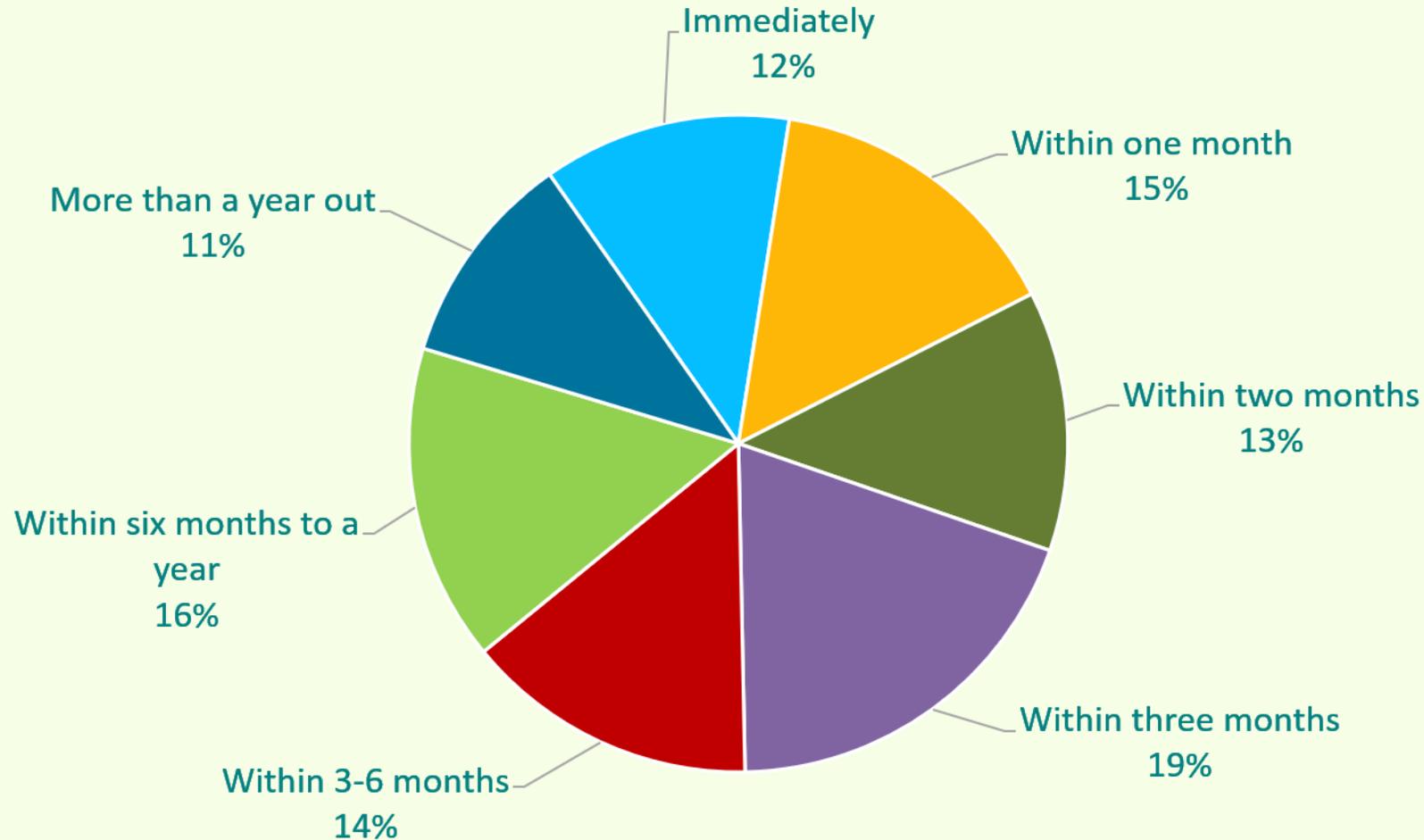
Which of these singular occurrences (alone or in conjunction with something else) would make you would make you comfortable to visit a theme park, without hesitation?

- This would NOT EVEN PARTIALLY impact my decision one way or another
- I would need this occurrence/condition PLUS at least one other item on this list
- This ALONE would be sufficient assurance for me



WITH ASSURANCES, 59% 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?

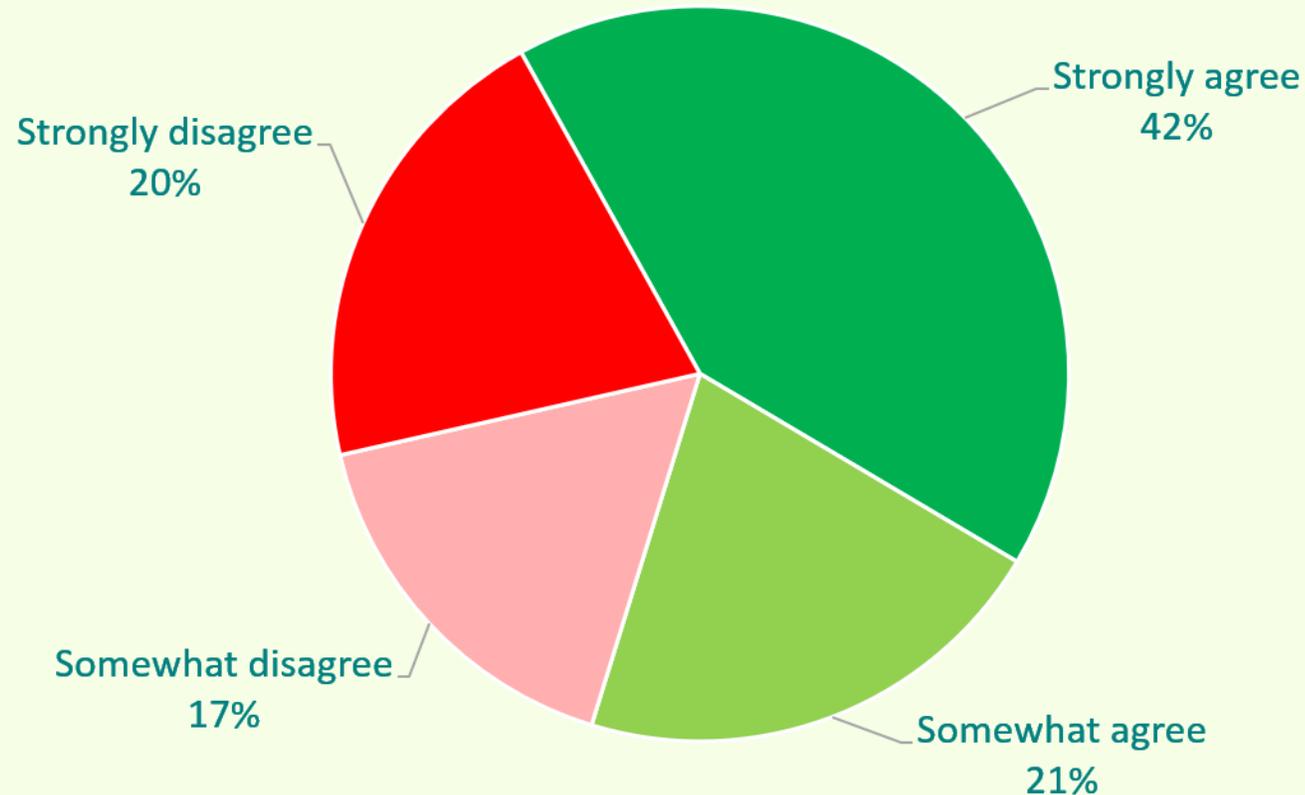




Let's get protected!

CERTIFY THAT YOU HAVE BEEN “BLESSED”

I'd be much more likely to visit a public place or fly on an aircraft that displays a certificate issued by a local government authority indicating that it has adhered to established protocols for sanitization

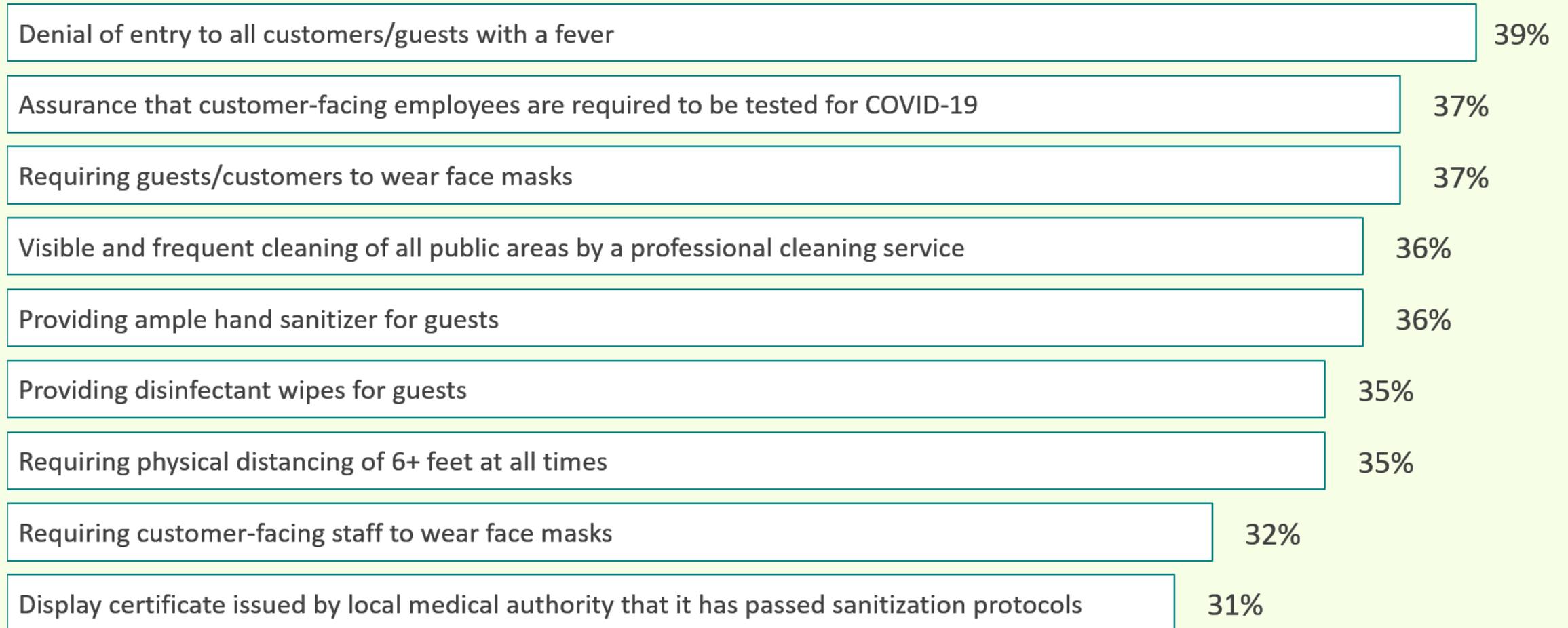


PROFESSIONALS NEED TO DO THE CLEANING



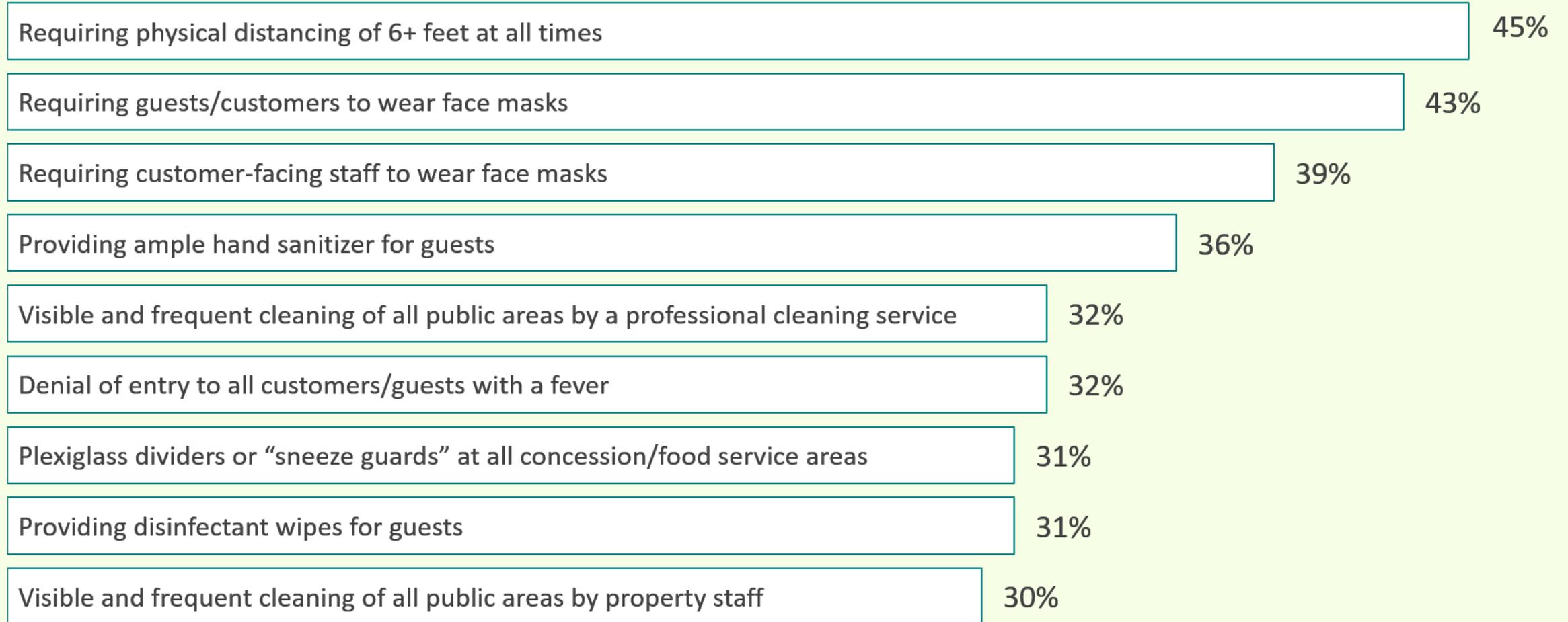
HOTELS NEED TO DO THIS

Percent of hotel guests who say this precaution would have a “top five” positive impact



RETAILERS NEED TO DO THIS

Percent of retail store customers who say this precaution would have a “top five” positive impact



Qualitative findings

10 1-ON-1 INTERVIEWS: 3 BIG TAKEAWAYS



HERE'S WHAT THEY THINK OF PRECAUTIONS

- **3 F's of Cleaning:** FREQUENT (the right timing), FOCUSED (the right surfaces), and FUNCTIONAL (the right products)
- **Short shelf life:** Testing employees for COVID-19 is very assuring, but has a fast-closing effectiveness window
- **Masks are expected** and becoming more accepted, but are not completely straight-forward
 - There are so many styles and materials; are all adequate?

Pros	Cons
Signals caring about others	Questionable effectiveness
Many people used to wearing	Uncomfortable/limiting
Synchronous with exposure	Appearance/culture

EMPLOYERS FACE VERY TOUGH QUESTIONS

- Where and when are masks required?
 - Is it fair for “personal office” employees to shut their doors and remove masks while common-area employees can’t?
 - What about meals and drinks?
- Why require employees to return to the office when social distancing / partial seating remains in play?
 - Zoom calls may replace employees in conference rooms, even when in the office
- Is non-compliance grounds for termination?
 - Are your managers aligned?
- Is the company responsible for PPE and cleaning products?
 - Can employees bring their own?

HOTELS AND RESORTS NEED TO BE PREPARED

- Travelers want to know how your cleaning procedures have improved in the Covid-19 environment
 - Provide cleaning supplies in each room for them to use (e.g., disinfecting wipes, hand sanitizer)
- Guests think they can social distance on their own – without markings or barriers
- And masks and testing are expected

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