

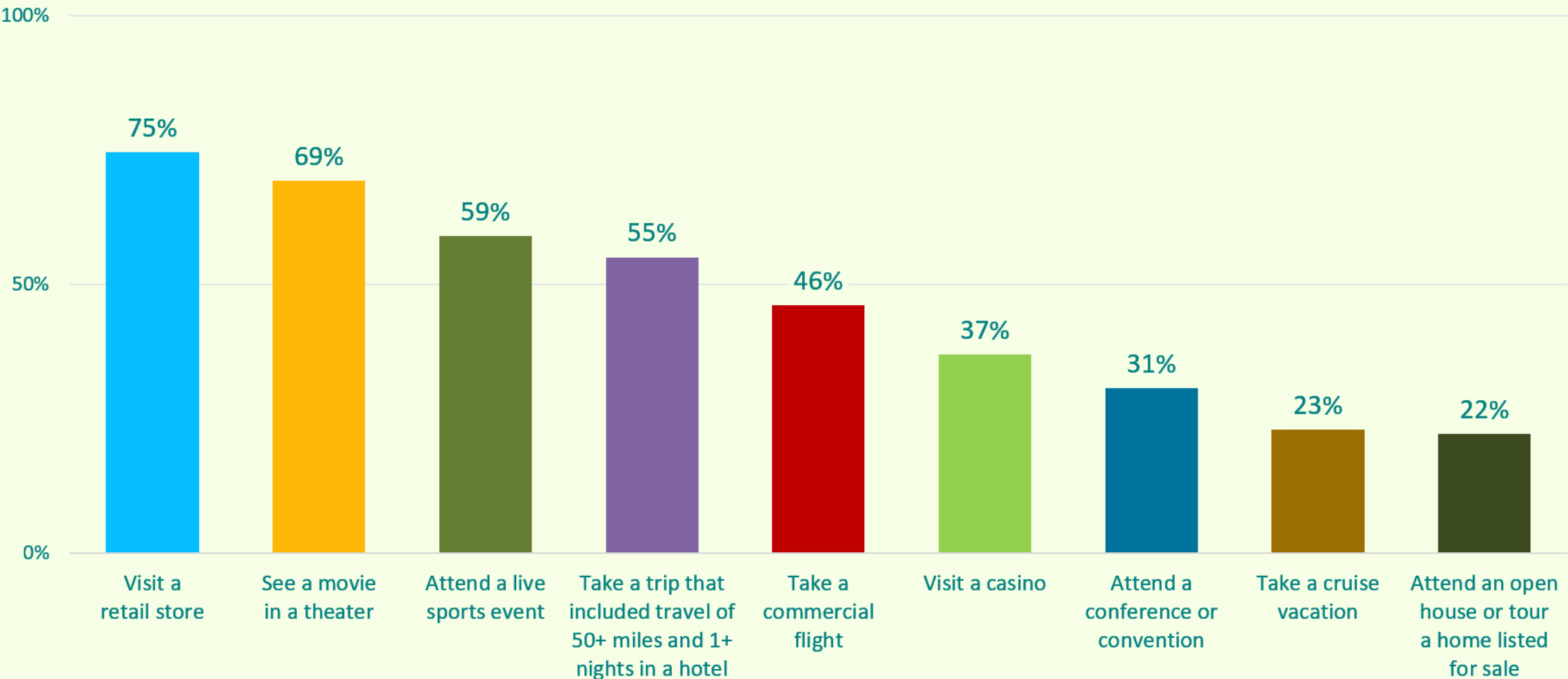
AMERICA APPROACHES AN INFLECTION POINT

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

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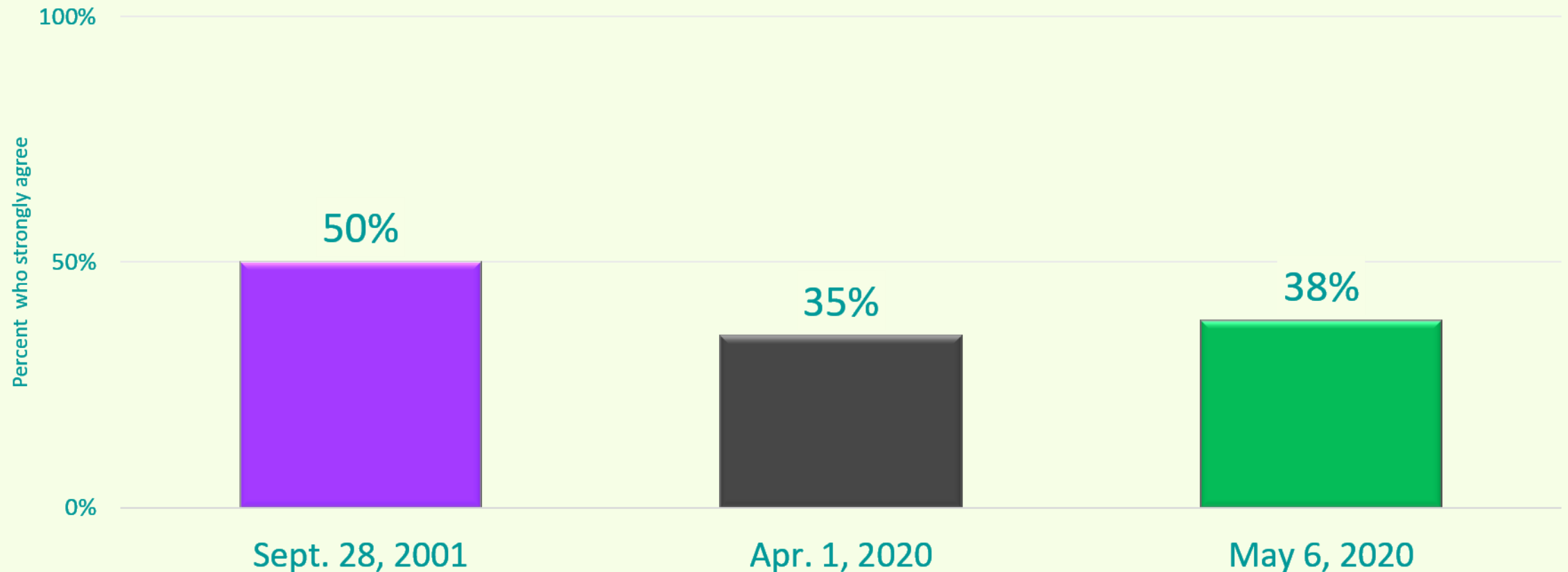
CONTEXT: RESPONDENTS ACTIVELY ENGAGE

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



A TOUGHER ENVIRONMENT THAN 9/11

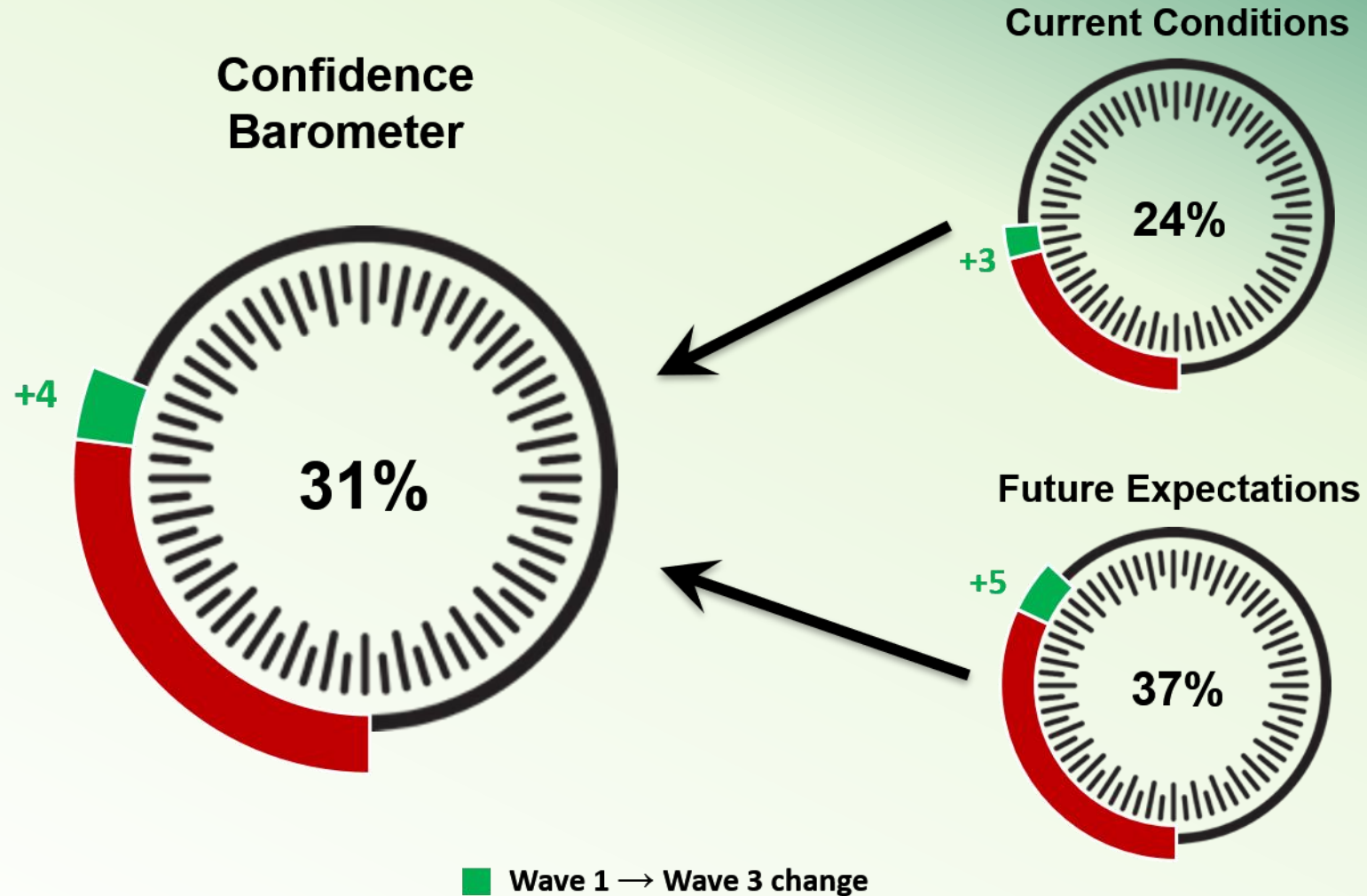
Taking a vacation of over 500 miles is a priority
for me and my family in the next 12 months



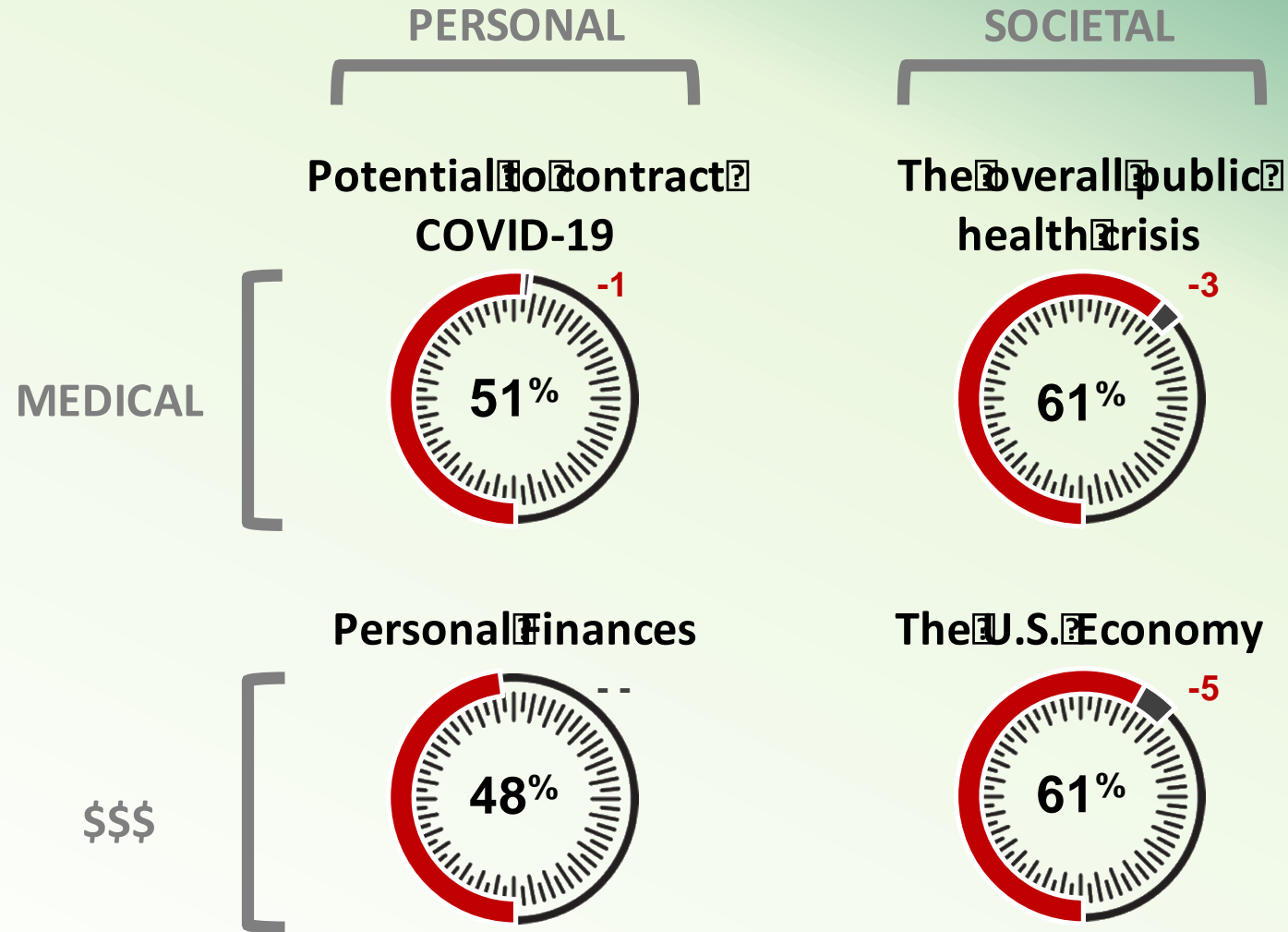


WHERE WE STAND RIGHT NOW

A SLIGHT UPTICK IN CONFIDENCE...GOES FLAT



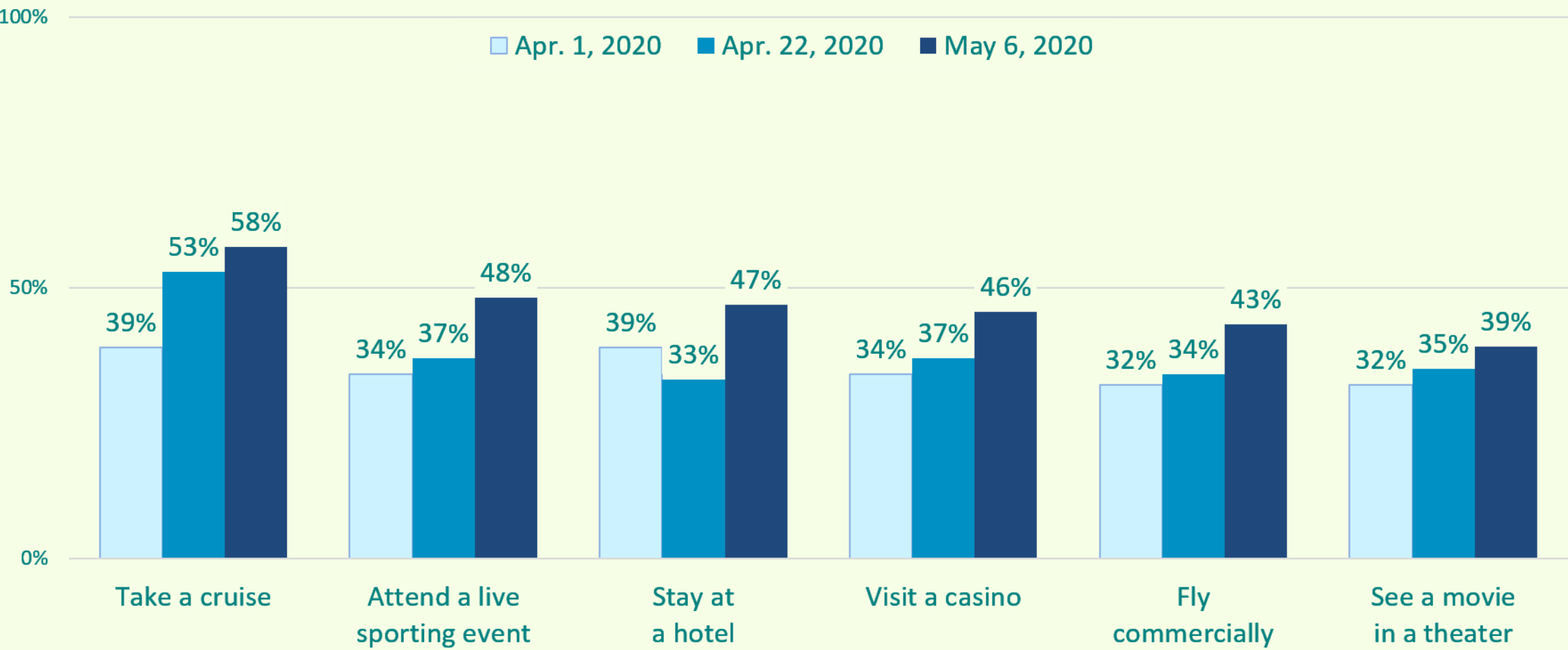
MATRIX OF CONCERNS



*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

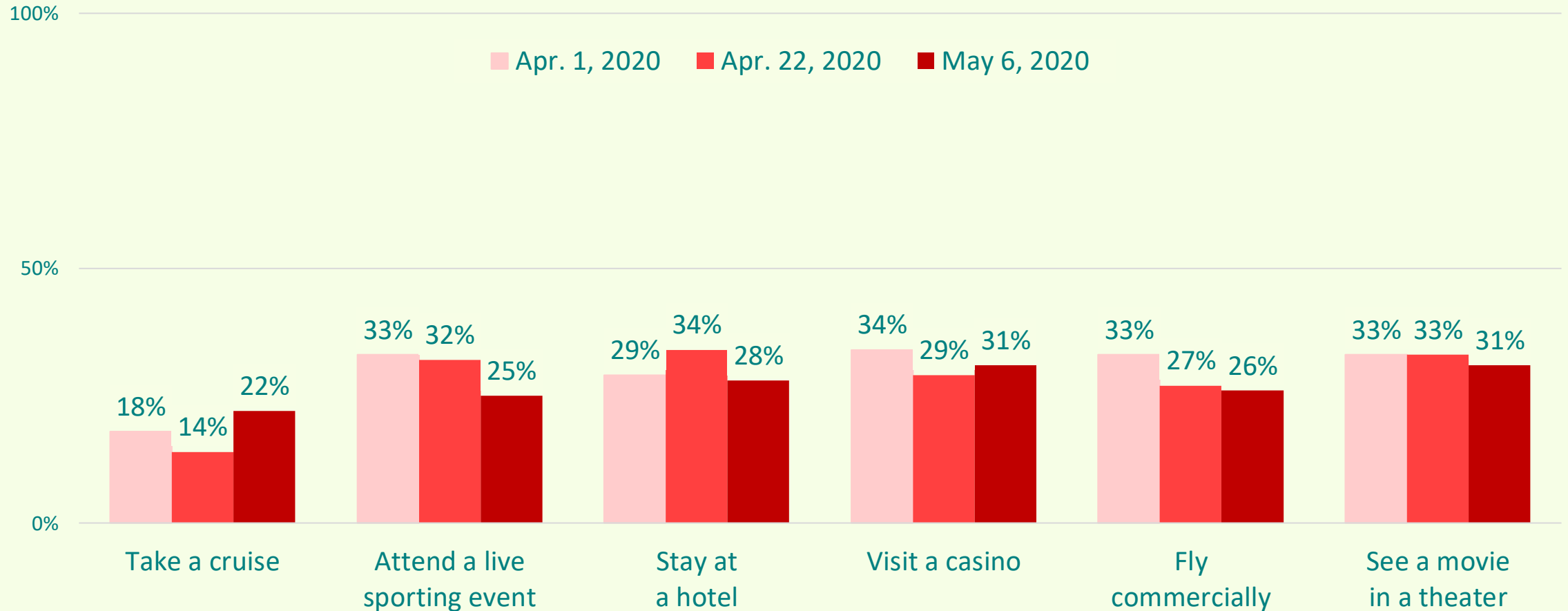
NEARLY HALF WOULD RETURN RIGHT NOW

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



1/4 UNWILLING TO BUDGE FOR MONTHS

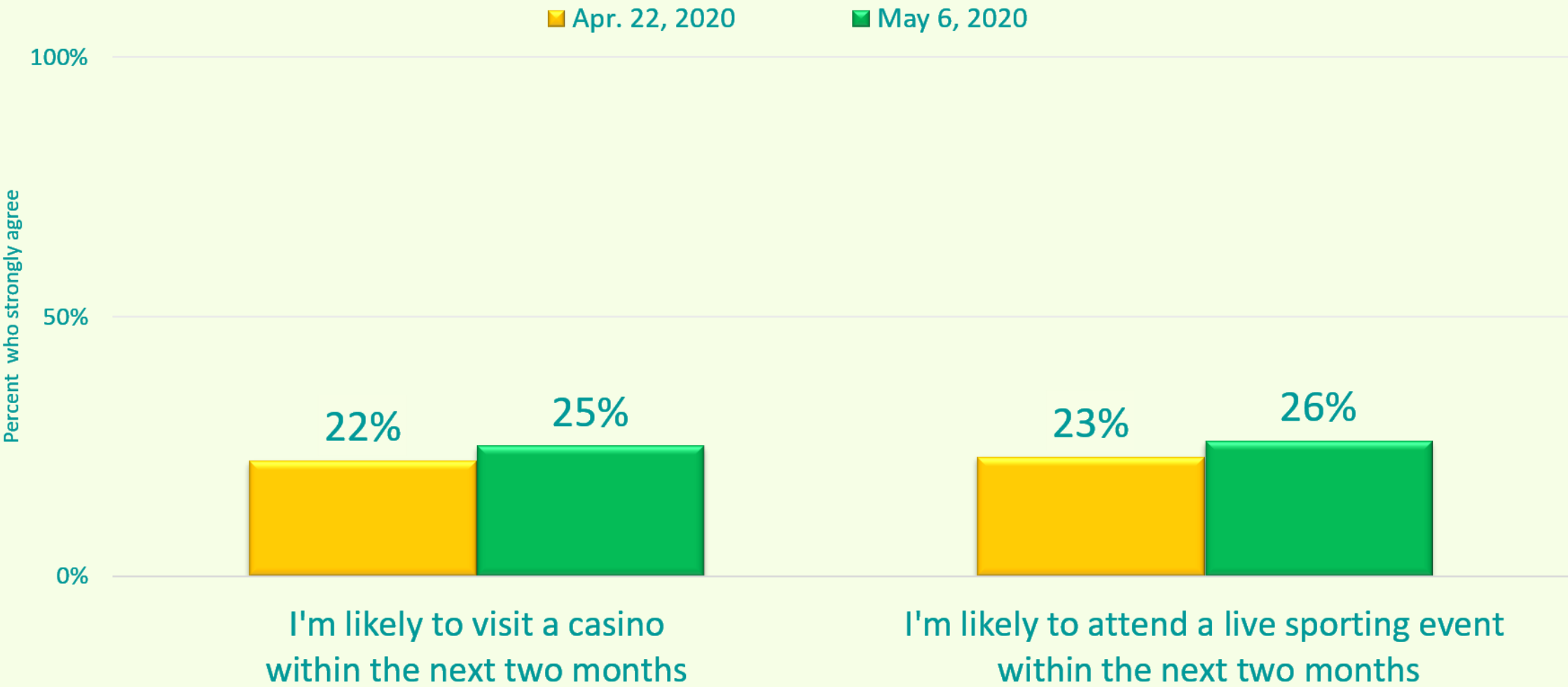
Percentage of respondents who require a vaccine or treatment for COVID-19 in order to re-engage



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

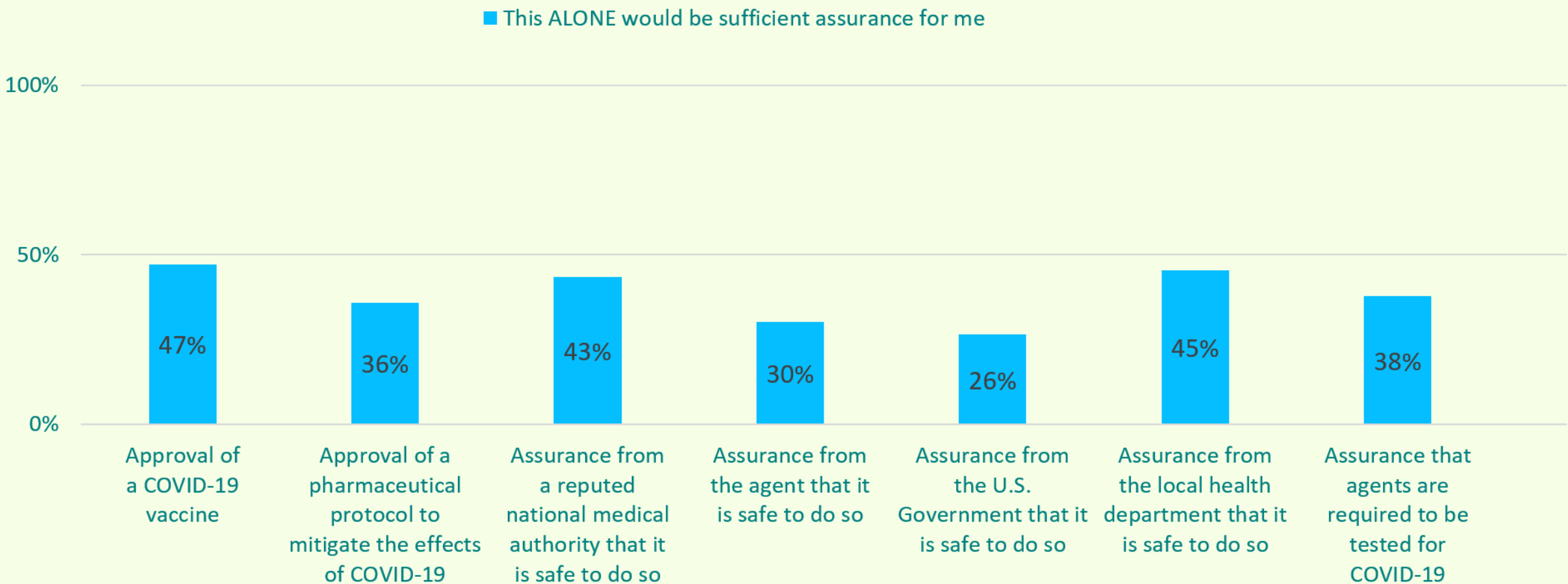
READY TO GO, BUT NOT EXPECTING TO GO



Open House or New Home Tours

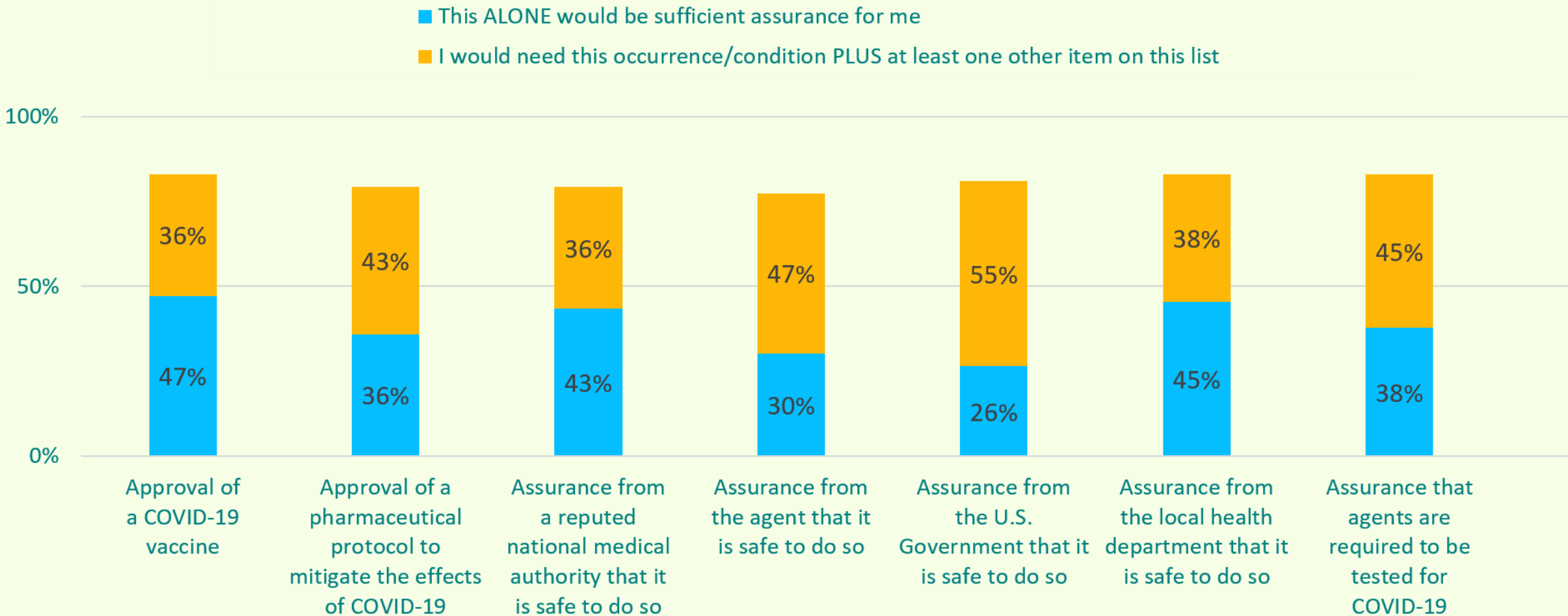
SOME ASSURANCES MATTER A LOT

Which of these singular occurrences (alone or in conjunction with something else) would make you comfortable attending an open house or new home tour, without hesitation?



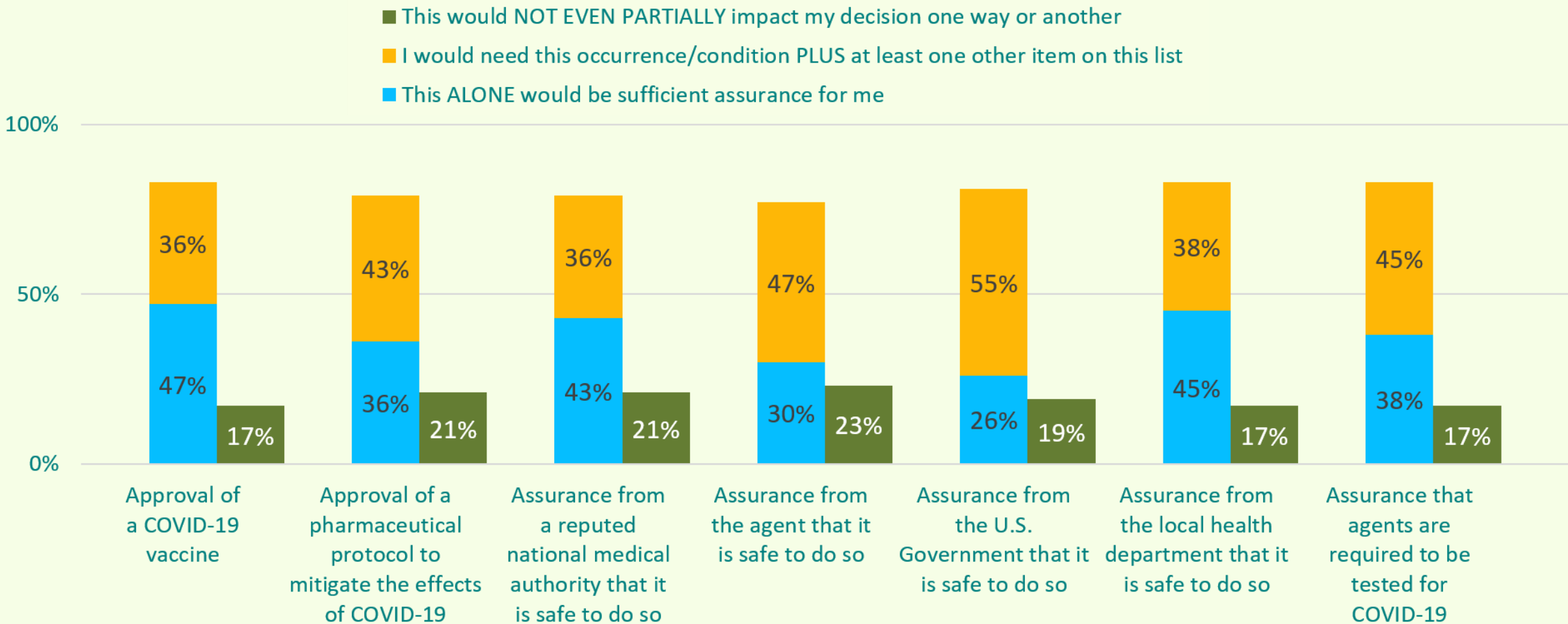
MORE THAN ONE ASSURANCE IS VITAL

Which of these singular occurrences (alone or in conjunction with something else) would make you comfortable attending an open house or new home tour, without hesitation?



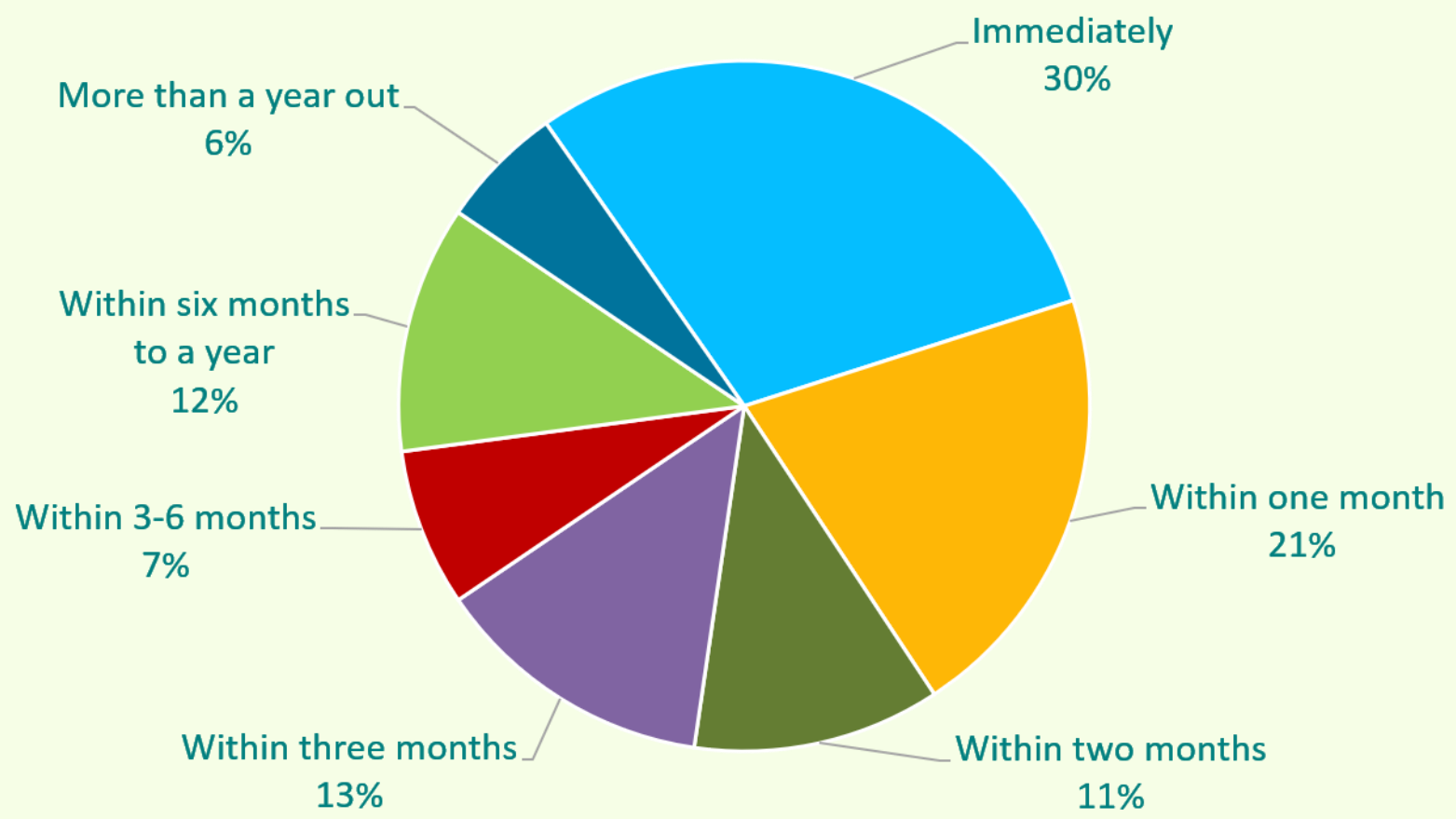
FOR 1/5, NONE OF THESE ASSURANCES MATTER

Which of these singular occurrences (alone or in conjunction with something else) would make you comfortable attending an open house or new home tour, without hesitation?



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 an open house or tour a home listed for sale?

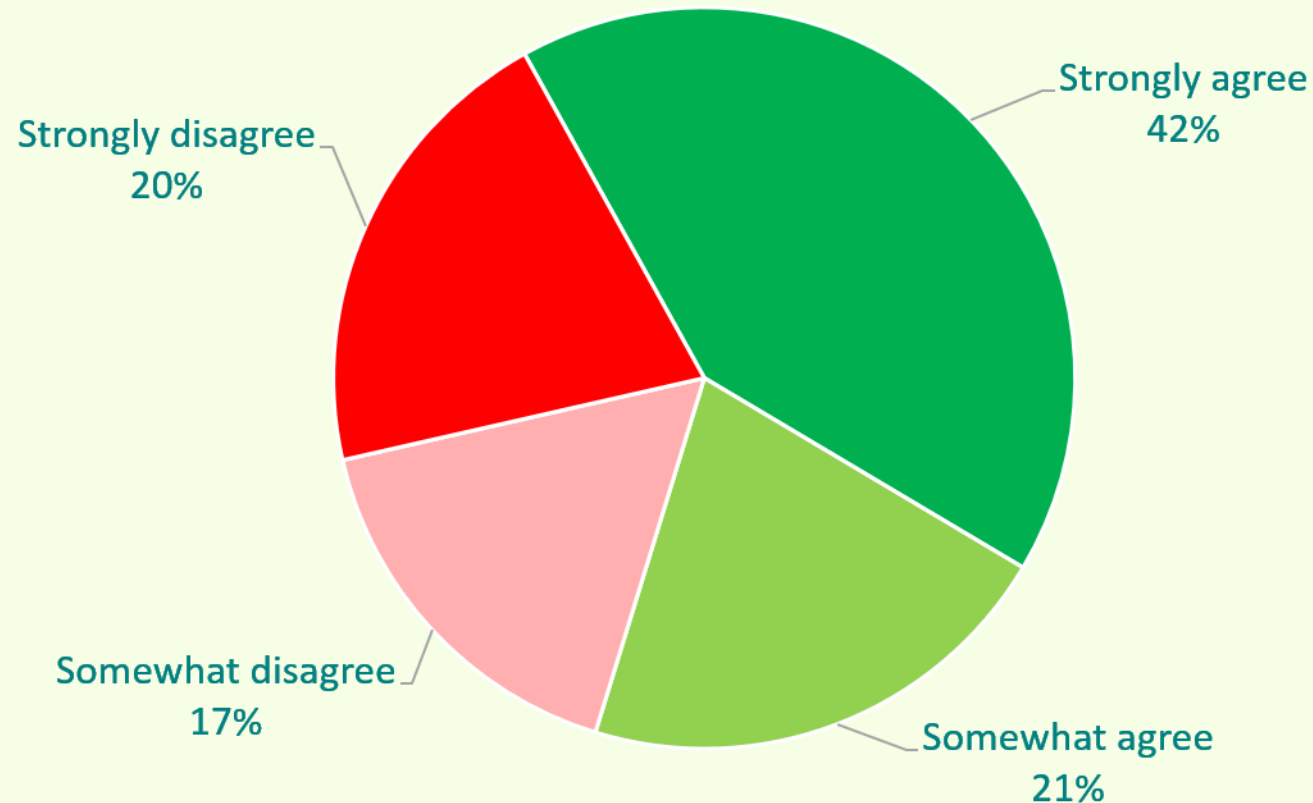




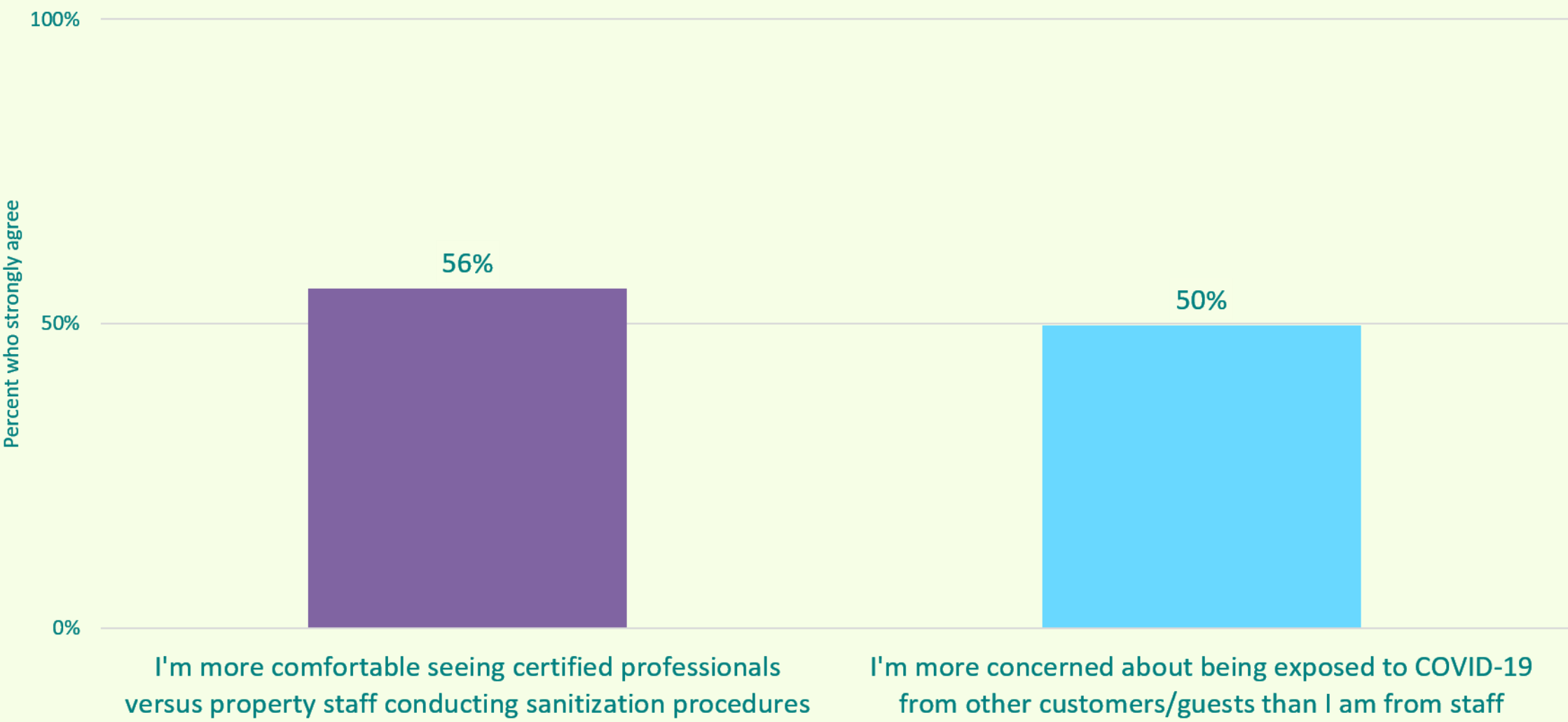
Let's get protected!

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

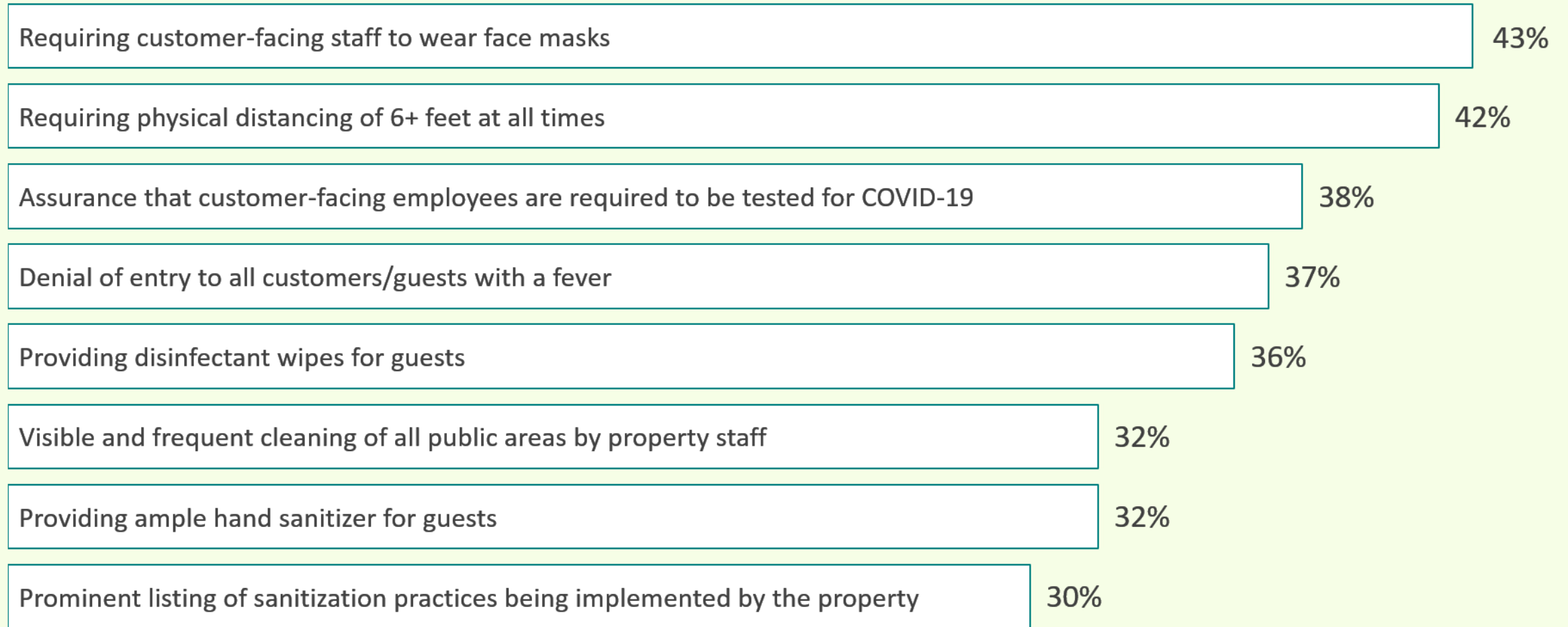


PROFESSIONALS NEED TO DO THE CLEANING



KNOW THE TOP PRECAUTIONS

Percent of open house visitors 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?

REAL ESTATE AGENTS NEED TO BE PREPARED

- Sellers are viewed as at a higher risk than buyers – they have less control of their risks
- Buyers are fairly comfortable touring homes
 - Buyers expect to wear masks and avoid directly touching surfaces
 - Buyers think they have a good sense of what a clean home looks like – may choose to pass on home tour if it doesn't “look” clean
- Buyers and sellers rely on their agent to inform and enforce compliance to Covid-19 precautions and encourage mutual respect
- Beyond health concerns, economic uncertainty has caused some buyers/sellers to pause their activity

QUESTIONS

- What questions do you have about these findings?
- What questions should we consider for wave 4?
- When would you like us to brief your members?



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