

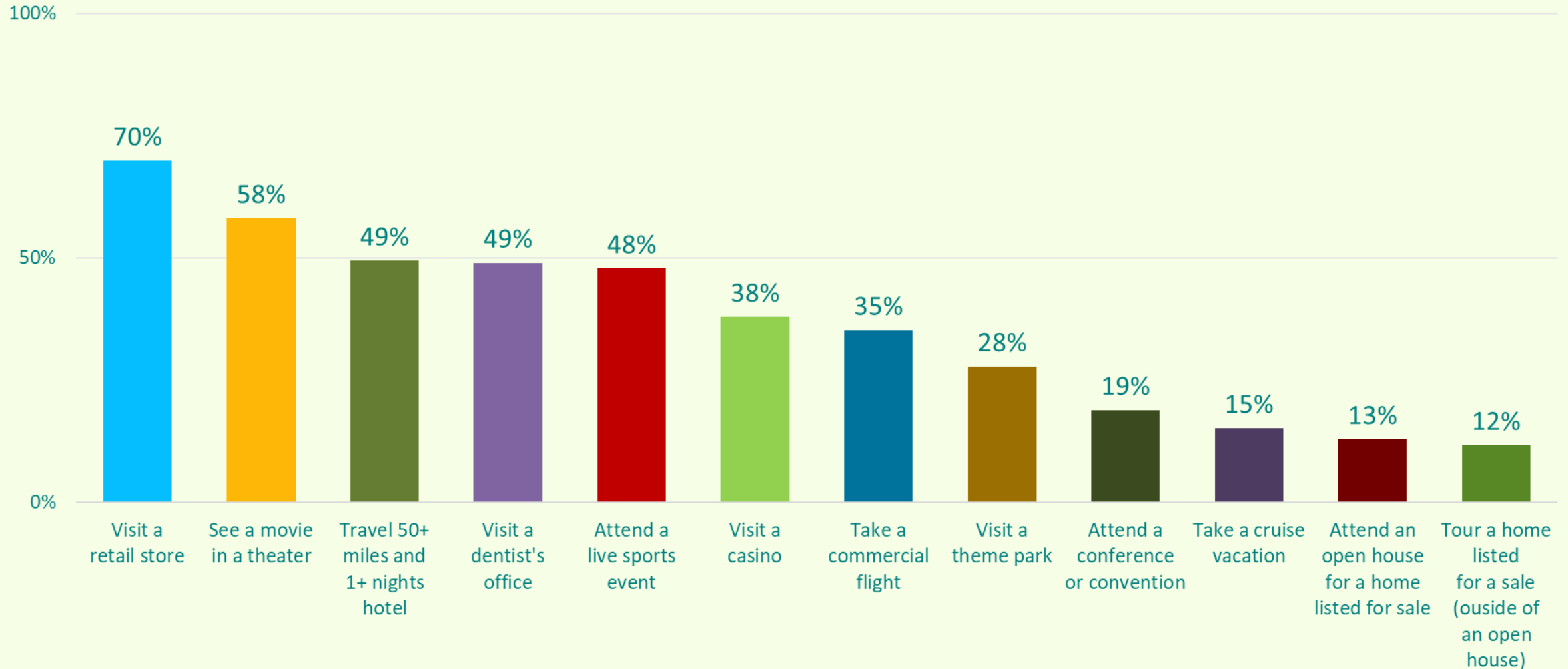
I'M GETTING BY, BUT EVERYTHING'S A MESS

Public opinion insights from the June 17, 2020 benchmark “Back-to-Normal Barometer”

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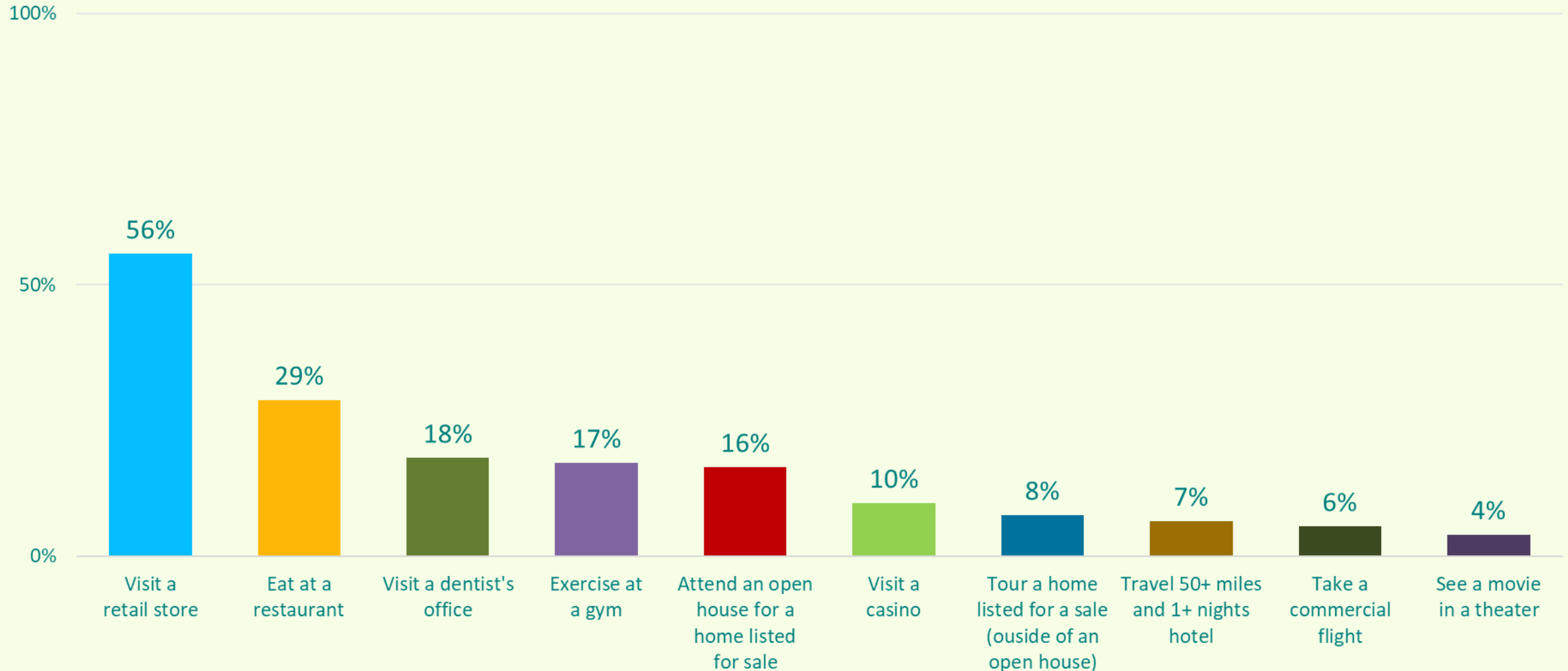
CONTEXT: RESPONDENTS ACTIVELY ENGAGE

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

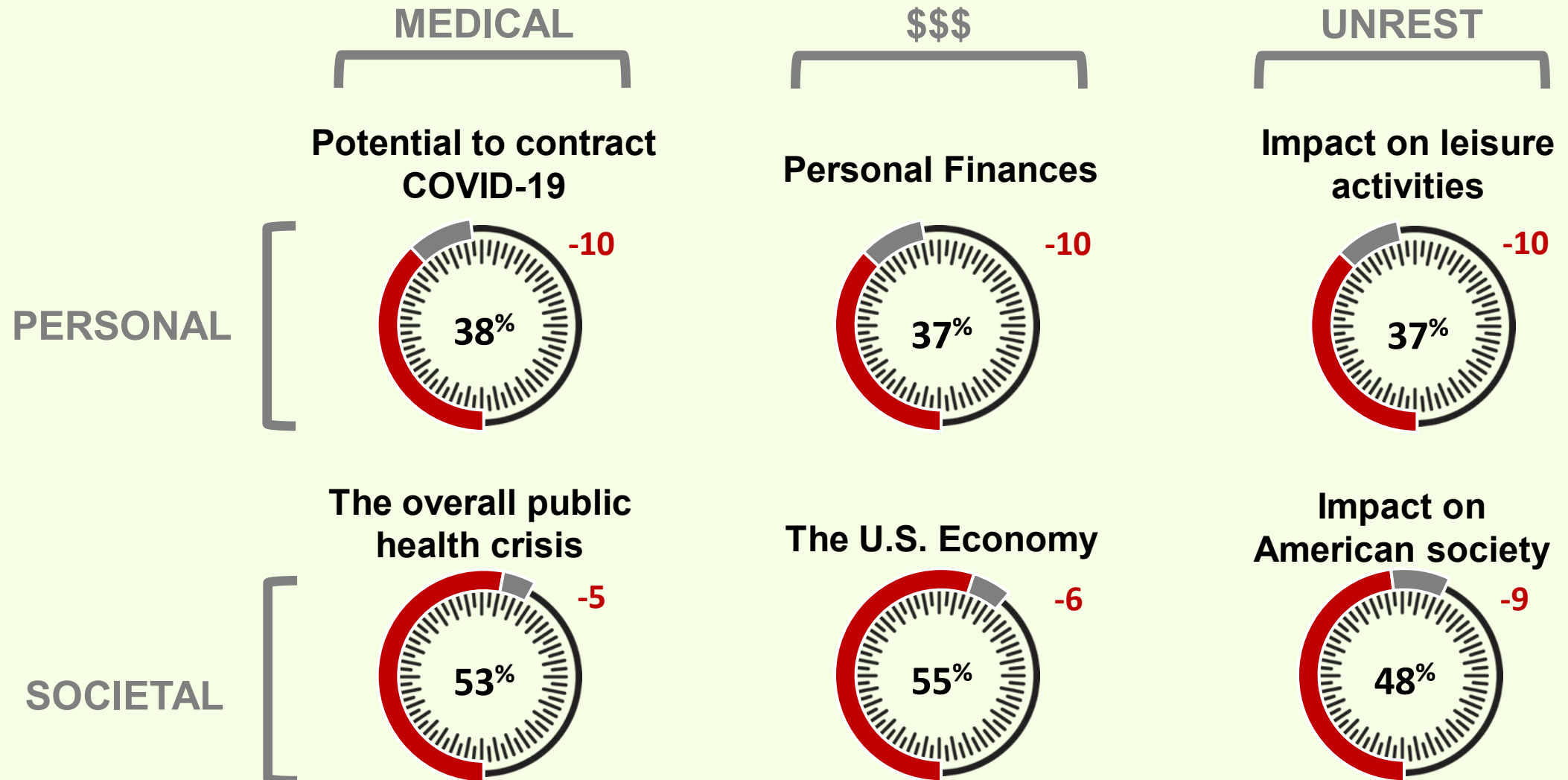


CONTEXT: SOME HAVE STARTED TO VENTURE OUT

Percent who have participated in this activity in the past month



WHAT ARE CONSUMERS MOST CONCERNED ABOUT?



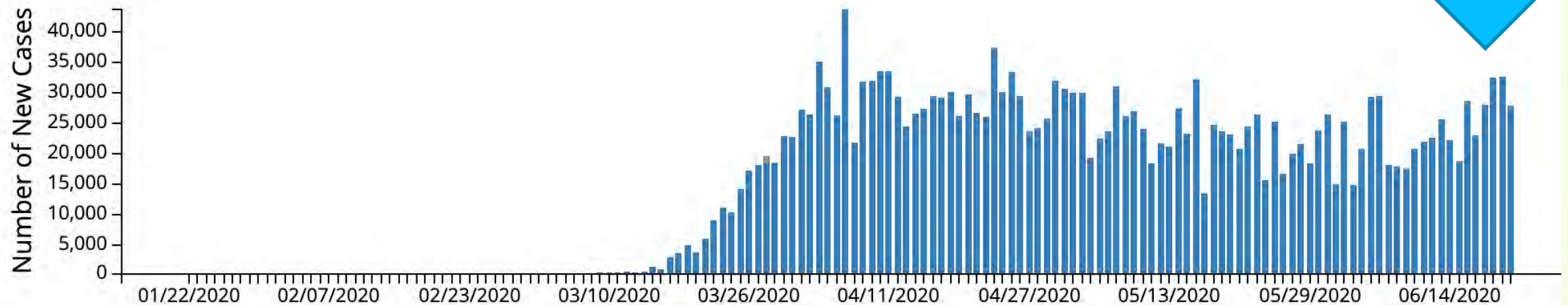
*Percentage who said they are extremely concerned
Wave 6: n=565 Back to Normal Barometer – June 17, 2020
Wave 5: n=613 Back to Normal Barometer – June 3, 2020

But...

WITH CASES RISING...

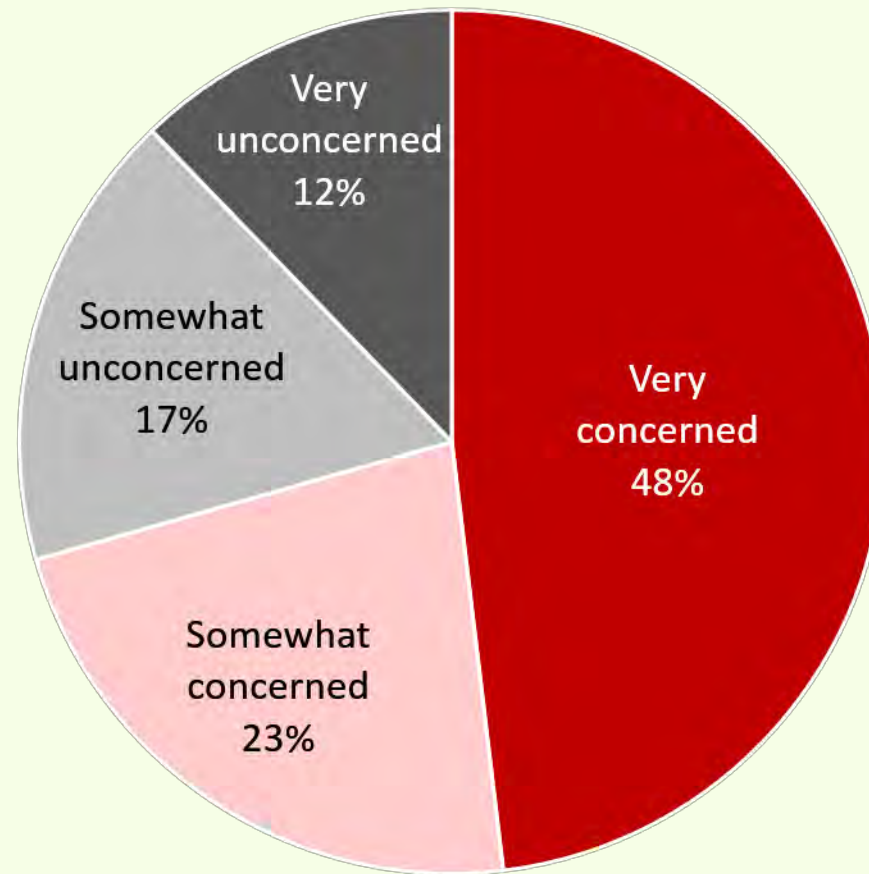
New Cases by Day

The following chart shows the number of new COVID-19 cases reported each day in the U.S. since the beginning of the outbreak. Hover over the bars to see the number of new cases by day.



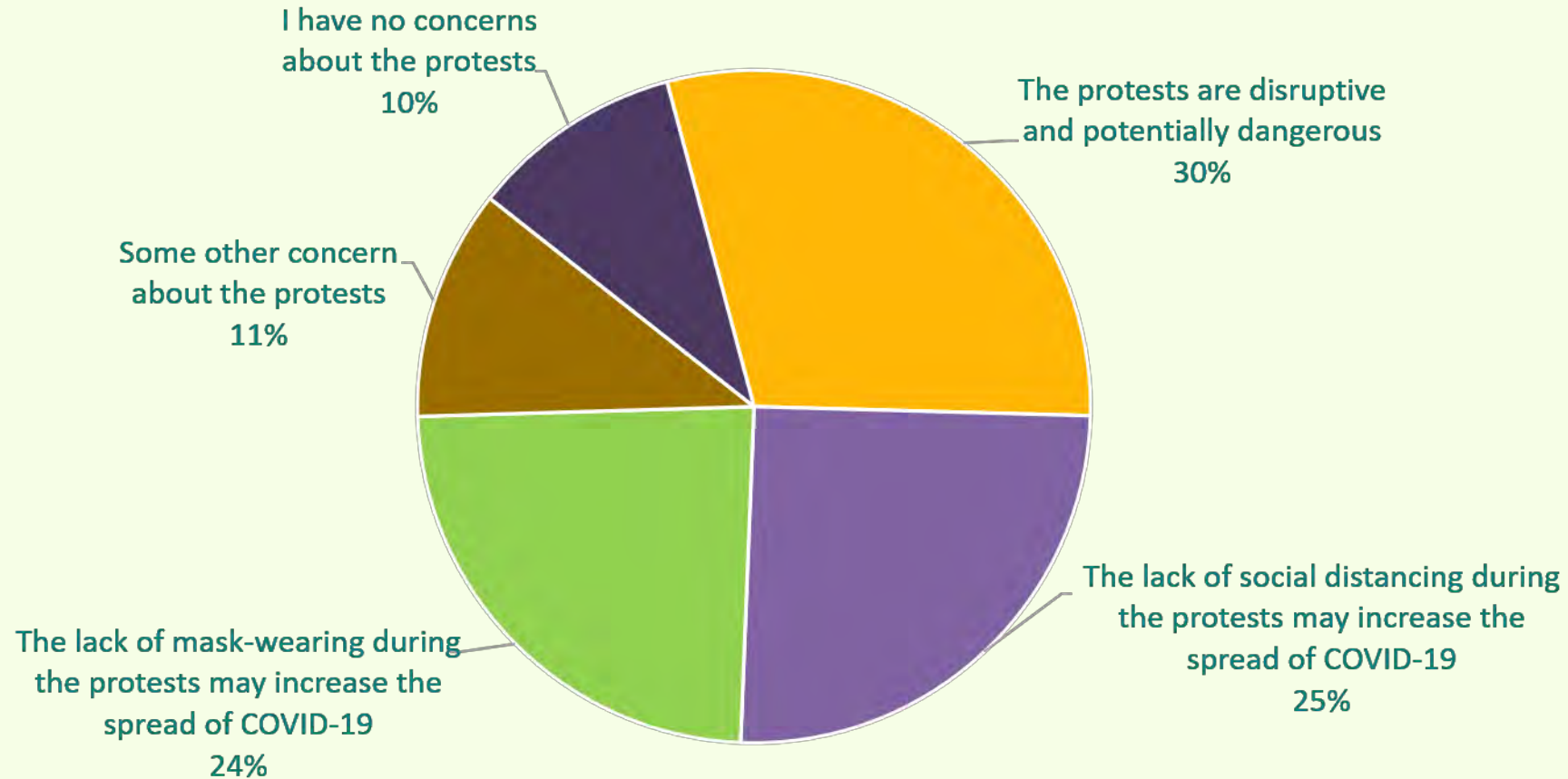
CONCERNS ABOUT SOCIAL UNREST PERSISTING...

How concerned are you regarding the impact of recent social unrest on American society at large?



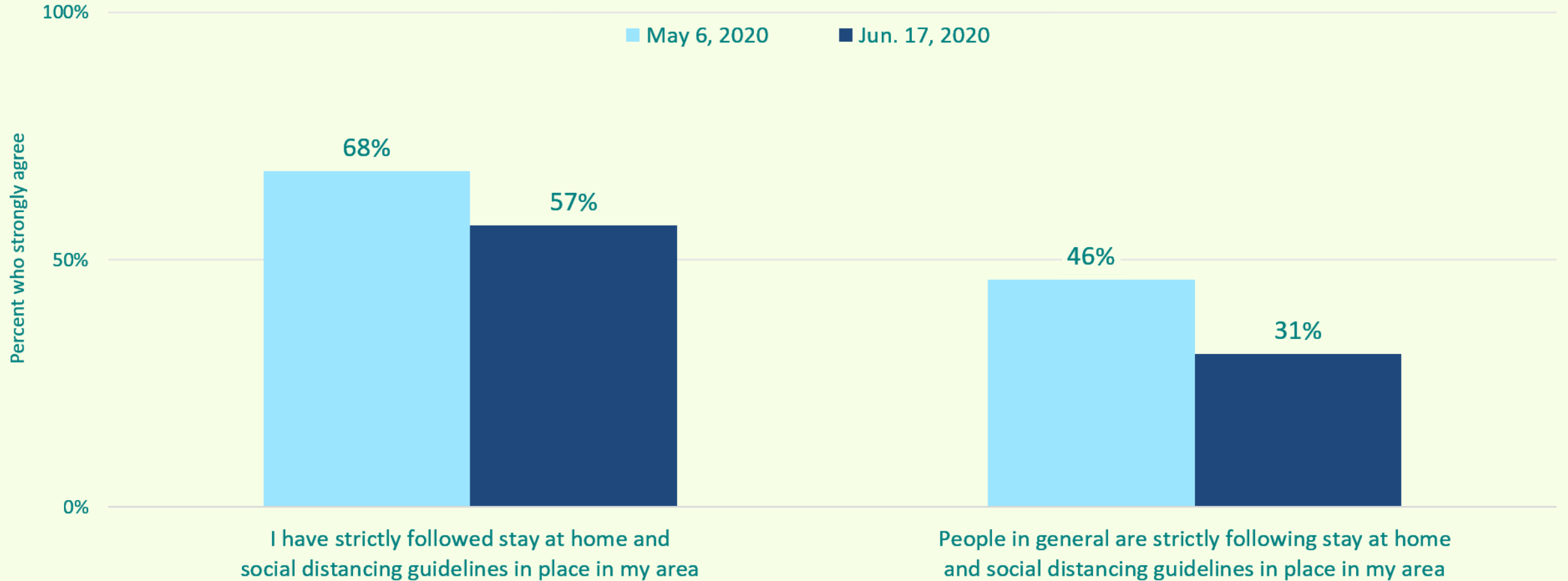
SOCIAL UNREST EXACERBATING HEALTH FEARS...

Which of the following is your greatest concern about the recent social unrest?

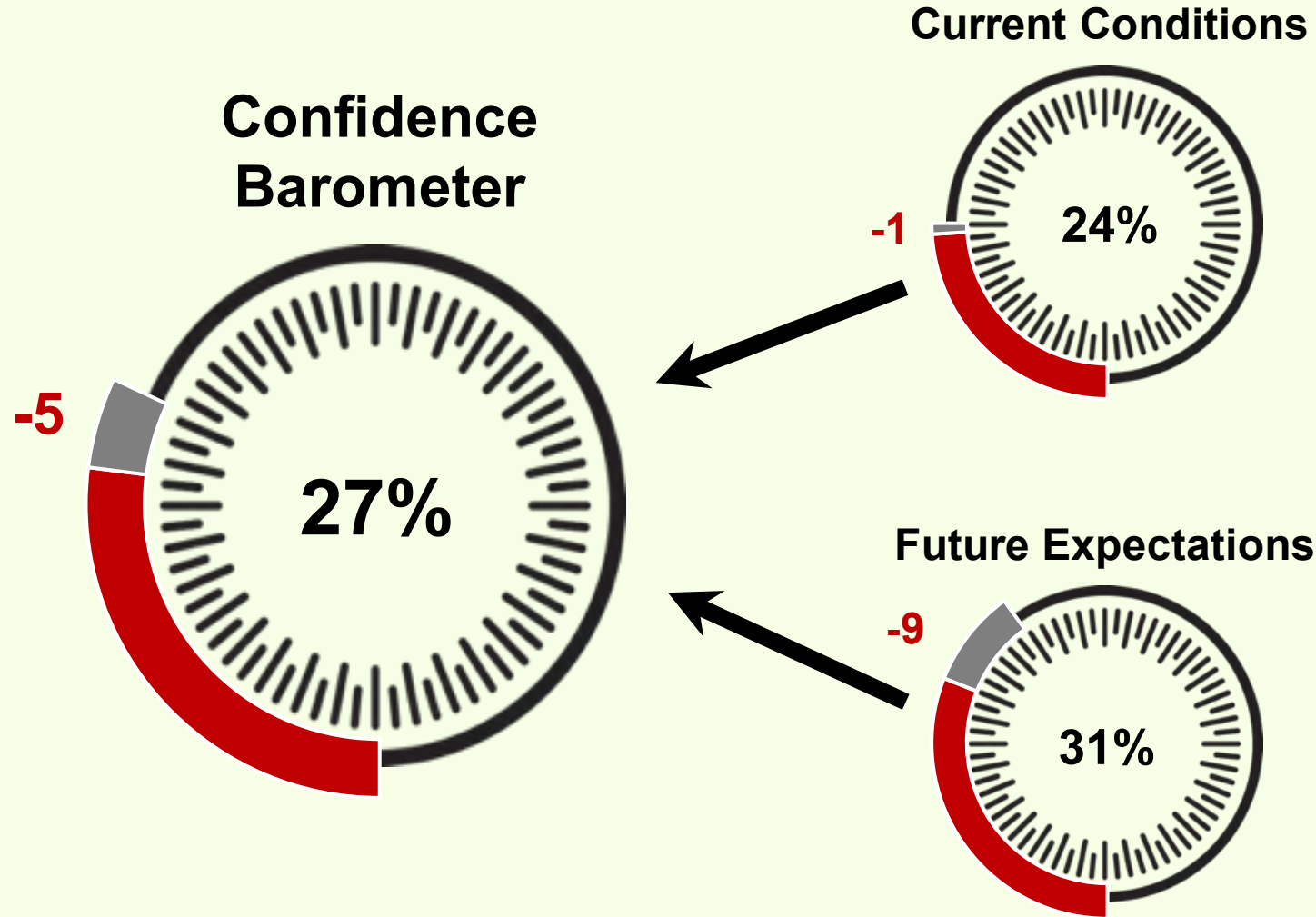


AND OTHERS NOT FOLLOWING THE RULES...

Please indicate how much you agree or disagree with each of the following statements:



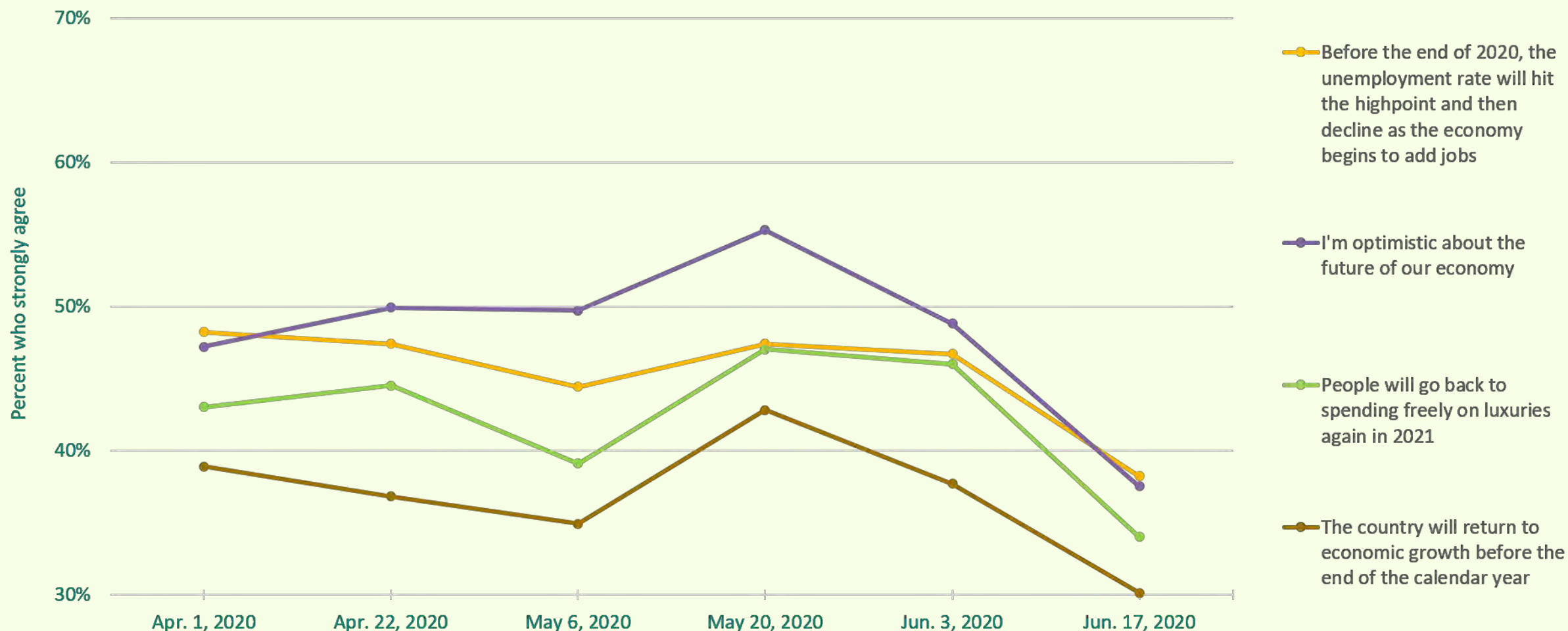
CONFIDENCE BAROMETER: BACK TO WHERE WE BEGAN



n=565, Back to Normal Barometer, June 17, 2020

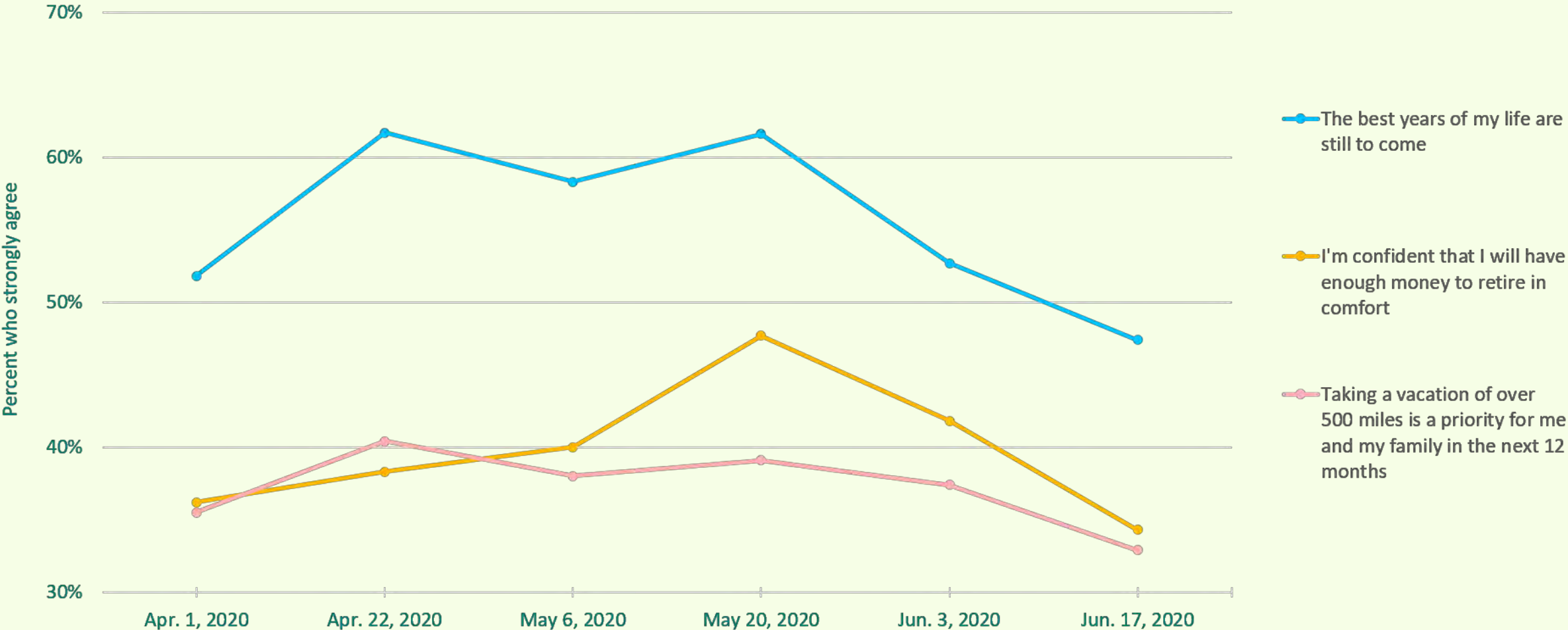
SOCIETAL FUTURE EXPECTATIONS HIT NEW LOW

Looking ahead, please indicate how much you agree or disagree with each of the following statements:



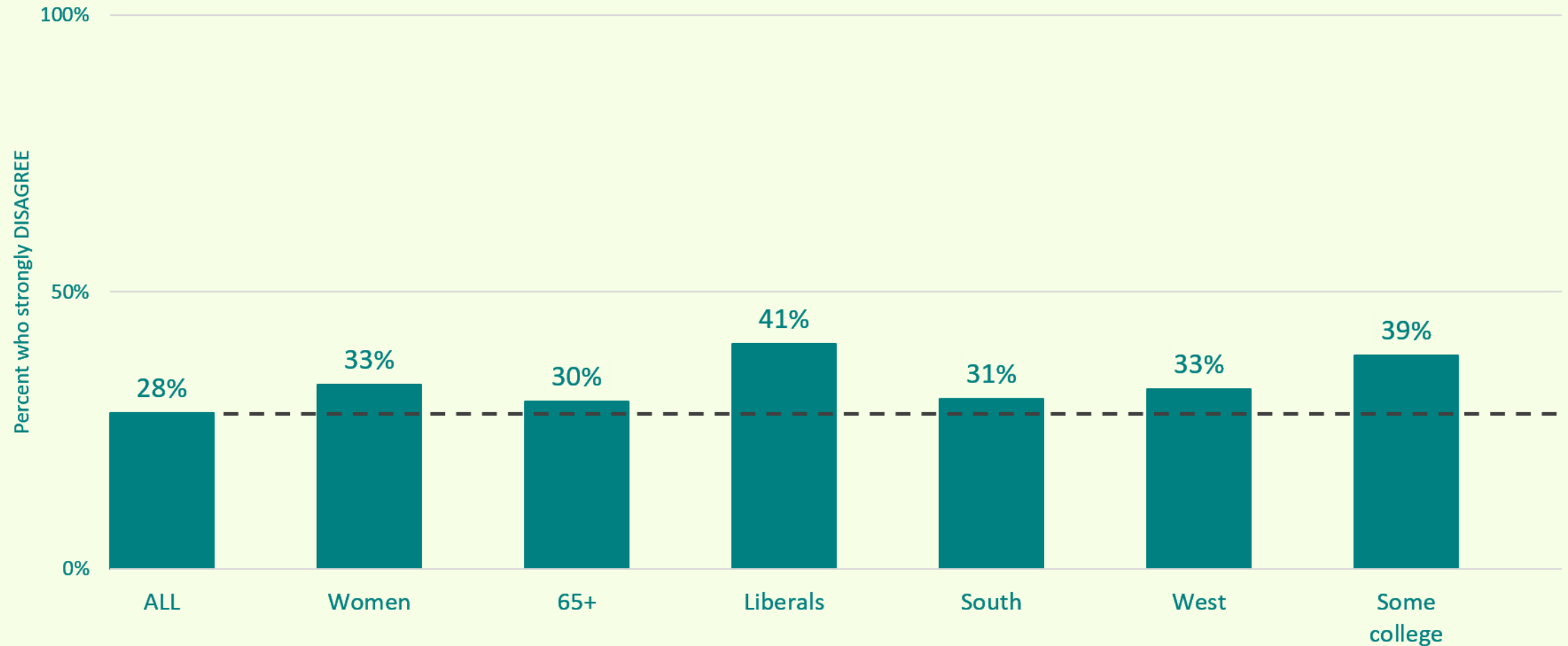
PERSONAL FUTURE EXPECTATIONS HIT NEW LOW

Looking ahead, please indicate how much you agree or disagree with each of the following statements:



SIZABLE SEGMENTS JUST NOT READY YET

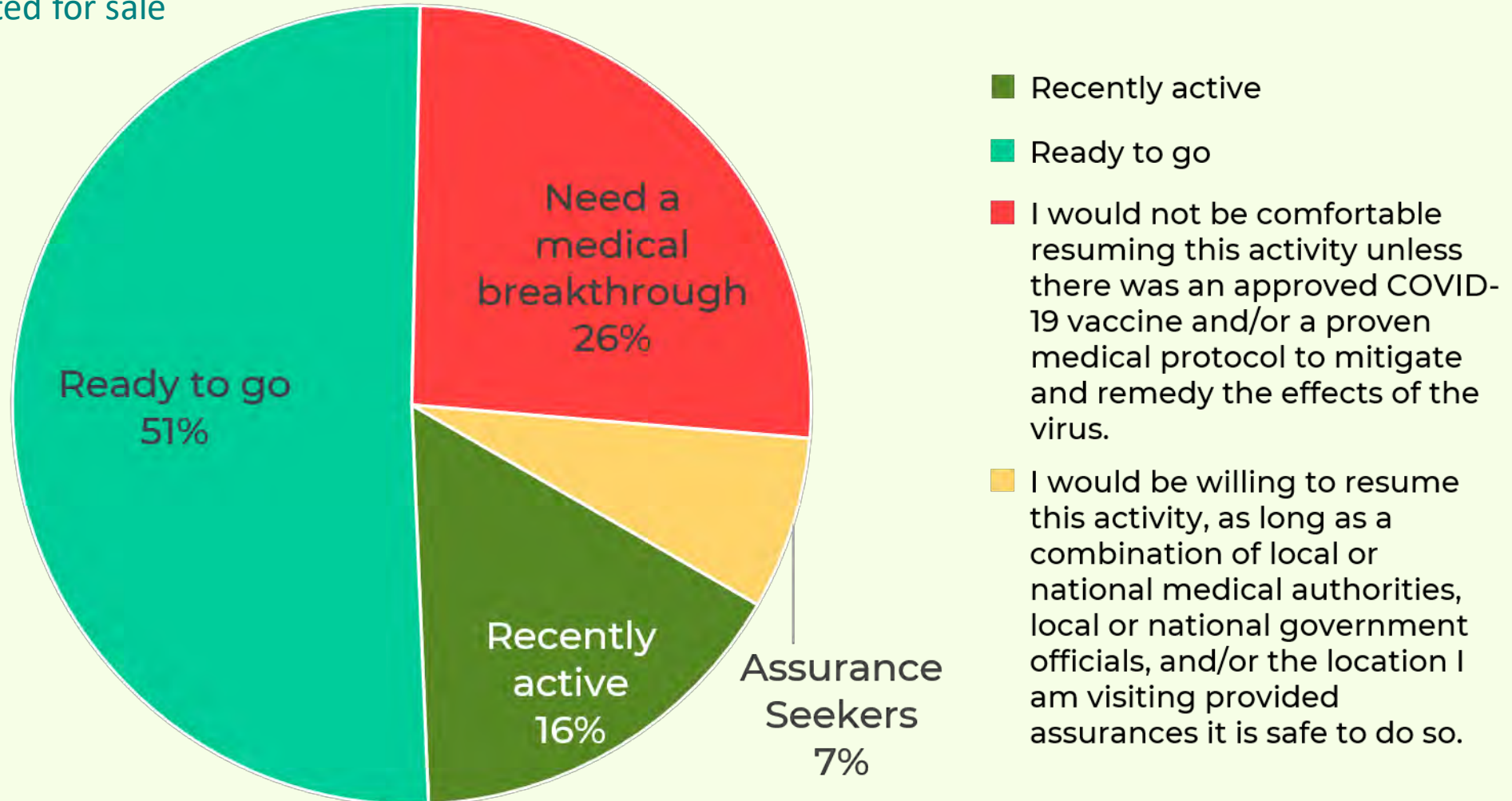
It's time for the country to open for business again. (Percentage who strongly disagree)



What this means for your sector

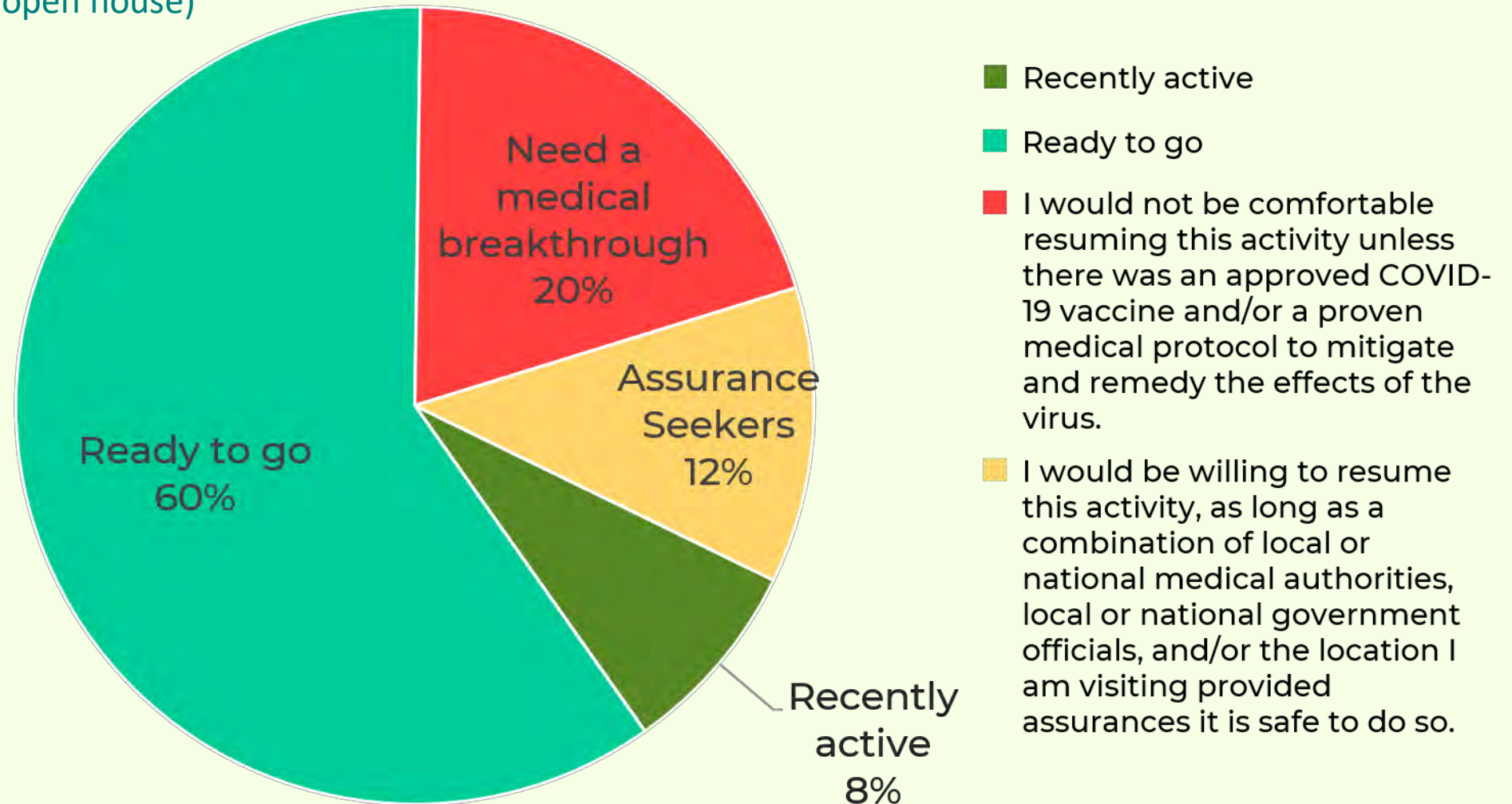
ENGAGEMENT: ATTEND AN OPEN HOUSE

Which of the following conditions is closest to your current point of view... Attend an open house for a home listed for sale



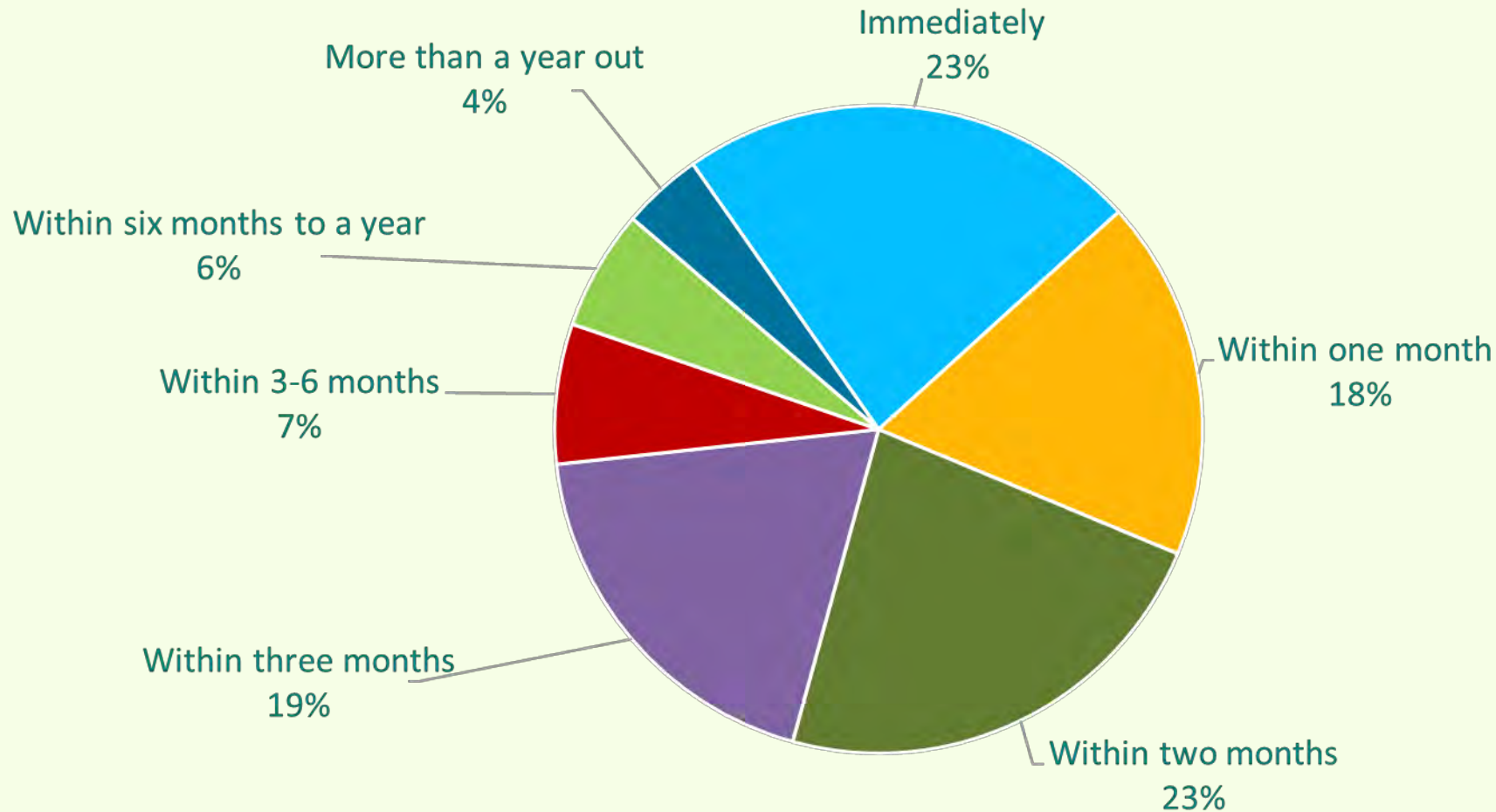
ENGAGEMENT: TOUR A HOME LISTED FOR SALE

Which of the following conditions is closest to your current point of view... Tour a home listed for sale (outside of an open house)



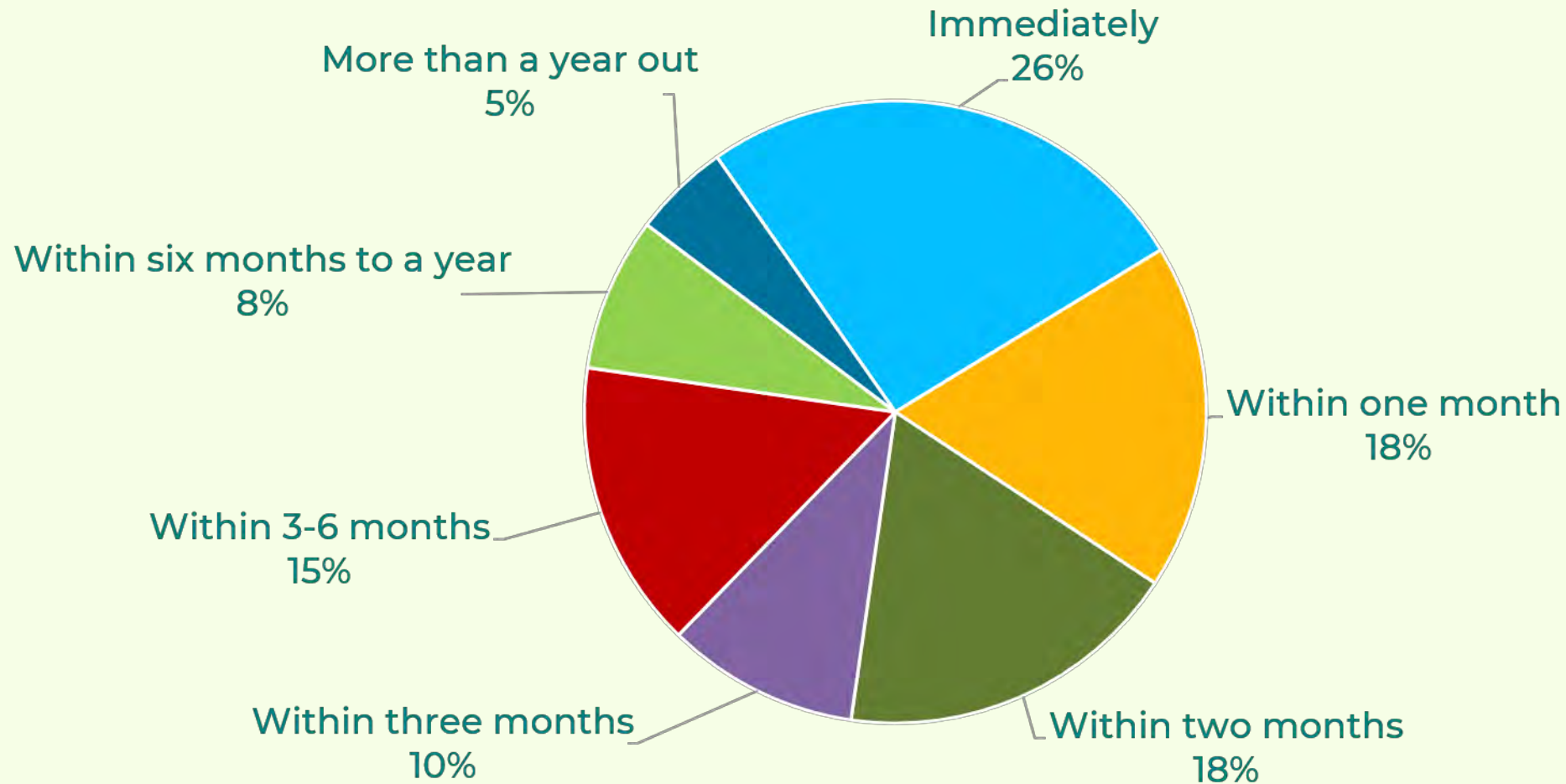
WITH ASSURANCES, 83% RETURN IN 3 MONTHS

Assuming you had the necessary assurances that it was safe to resume normal activities, how quickly would you next.... Attend an open house for a home listed for sale?



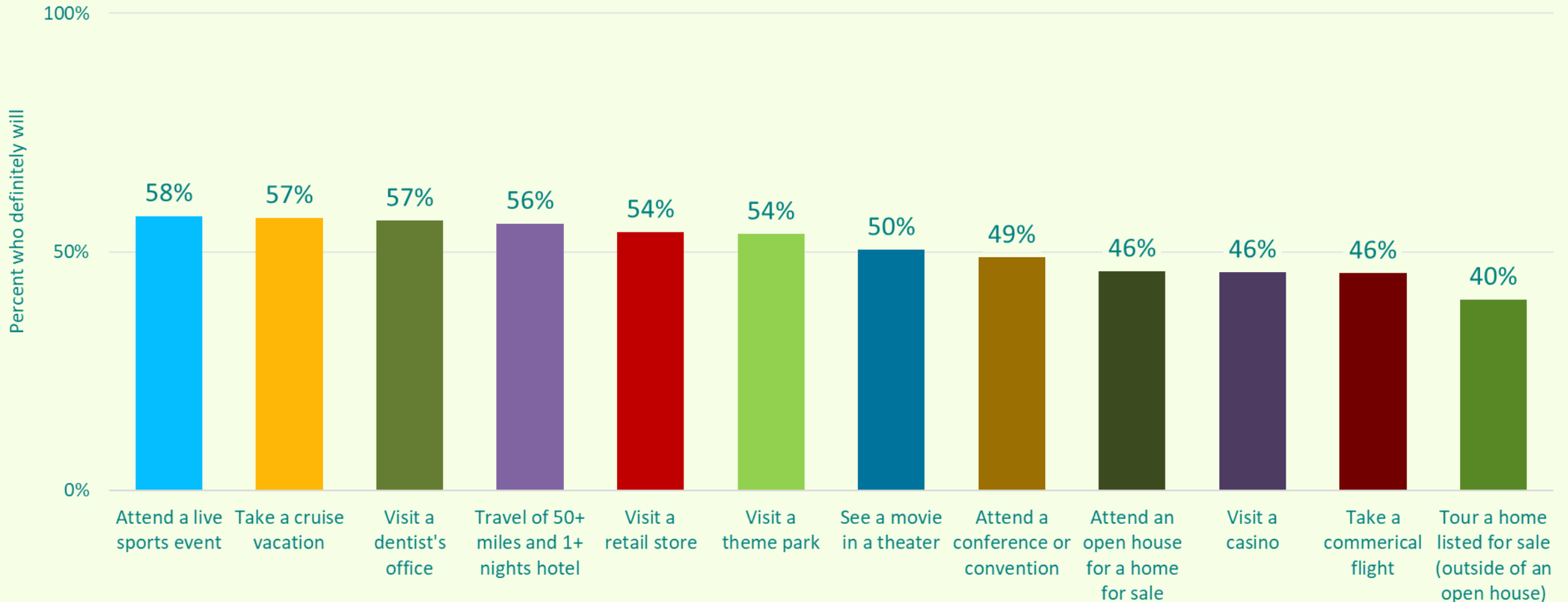
WITH ASSURANCES, 72% RETURN IN 3 MONTHS

Assuming you had the necessary assurances that it was safe to resume normal activities, how quickly would you next.... Tour a home listed for sale (outside of an open house)?



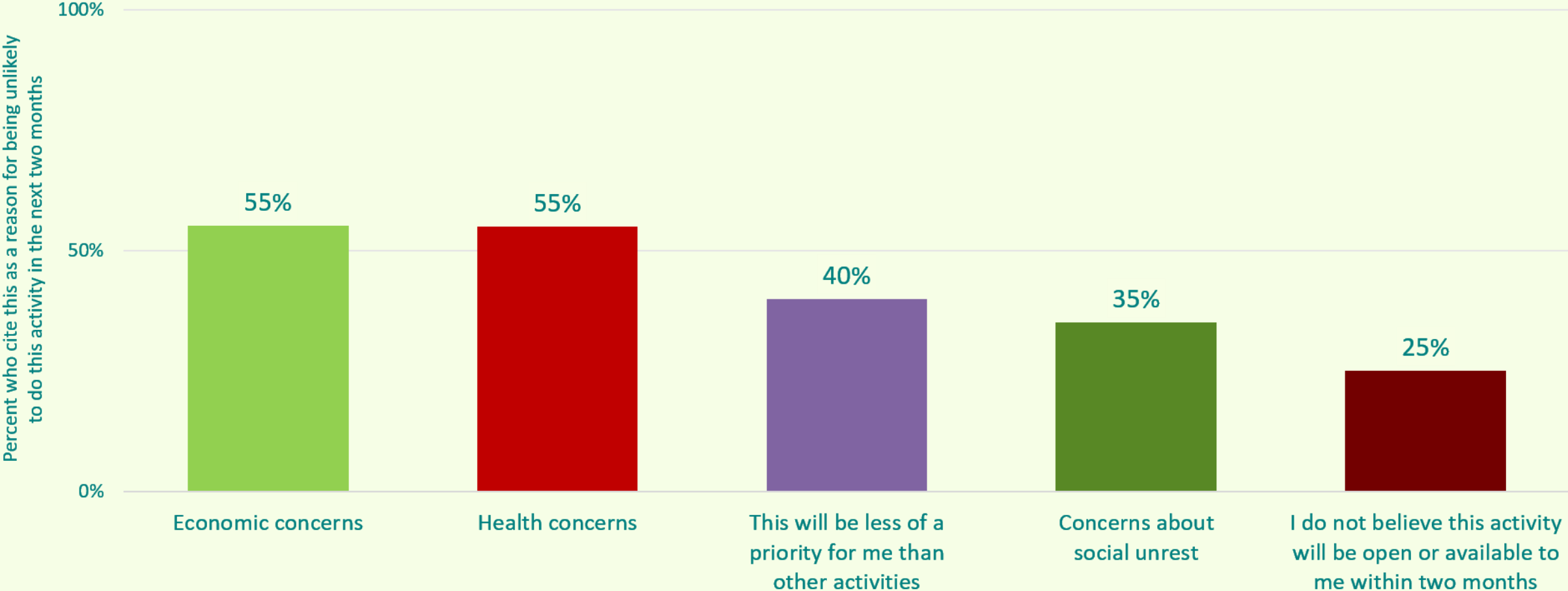
% “READY TO GO” WHO ACTUALLY “WILL GO”

You earlier indicated that you would be willing to engage in the following activities without hesitation. Sentiment aside, practically speaking, how likely do you feel that you will actually do so within the next two months?



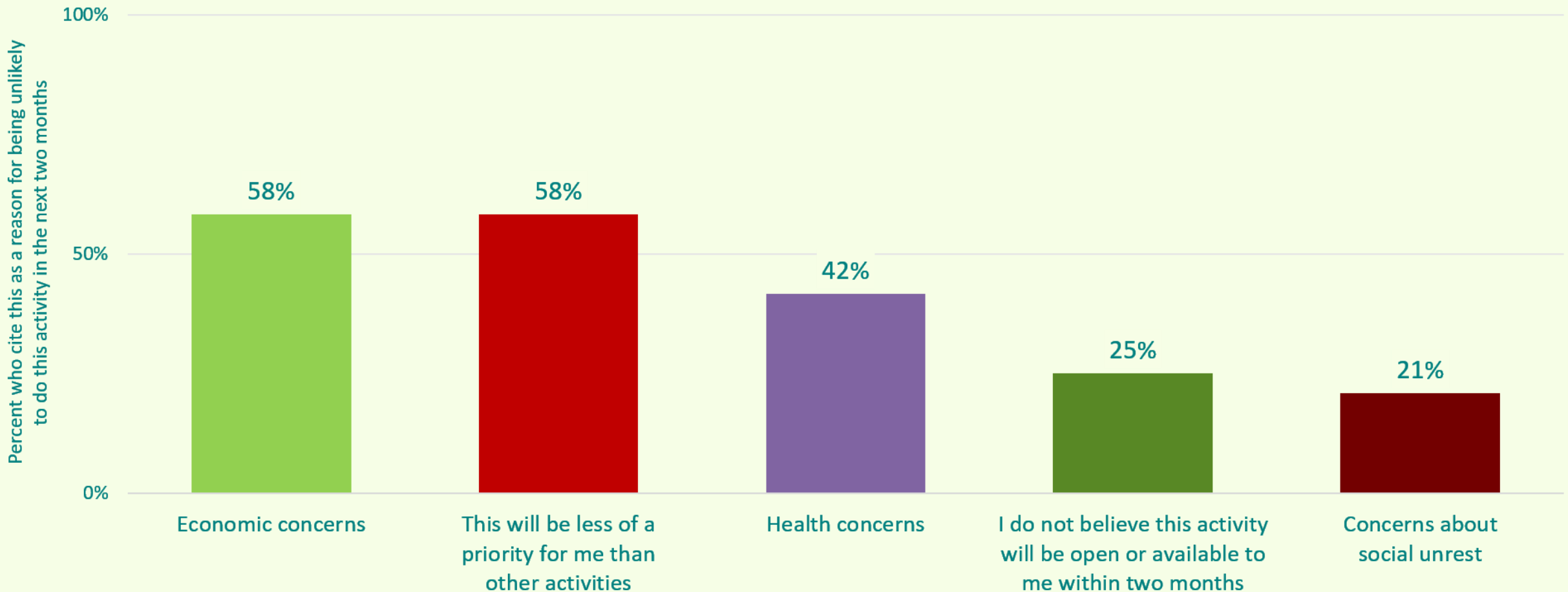
READY TO GO, BUT WON'T GO SOON—WHY NOT?

Which of the following make you less than very likely attend an open house for a home listed for sale within the next two months? (Check all that apply)



READY TO GO, BUT WON'T GO SOON—WHY NOT?

Which of the following make you less than very likely to tour a home listed for a sale (outside of an open house) within the next two months? (Check all that apply)



IN-DEPTH INTERVIEWS EXPLAIN THE HESITANCY



NO CLEAR DIRECTIONS = GUESS & MAKE YOUR OWN

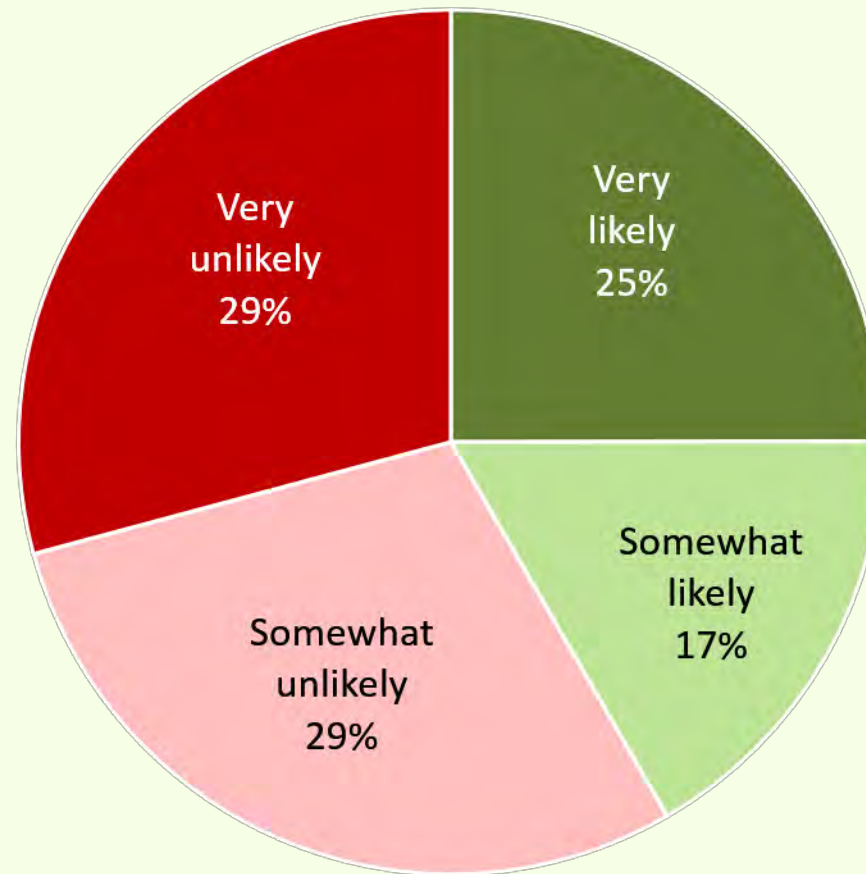
- Fears of a second wave of COVID-19
 - “Our neighboring states have an increase in numbers daily...so I try to ignore it as best as I can so that I don’t freak myself out.”
 - “[Opening the economy] is happening way too fast. I think we're going to regret a lot of these decisions in a couple of months.”
- Even shopping requires thought
 - “There is a lot of general anxiety and tension... [Nobody] really fully knows what to do.”
 - “I tried on a few pairs of shoes, and just put the shoes back in the box again. I don't know if that was a right thing to do or not, but that's what I did.”
 - “I just had to assume when I walked in the carts by the entrance had been cleaned...but there was no sign.”
- Unaware of the right boundaries, people create their own
 - Outdoor dining, local places to “escape” to, mask-wearing as door-opener

TESTING – THE KEY TO RETURNING?

- More testing is good, but continued concerns about reliability and questionable benefits
 - Who should have a test? When?
 - Can you catch COVID-19 again?
 - “Given the newness of everything, it probably provides a false sense of security sometimes when somebody either tests negative or tests positive for the antibodies...like a ‘get out of jail free’ card.”
- Necessary for vaccine development, but not sure how

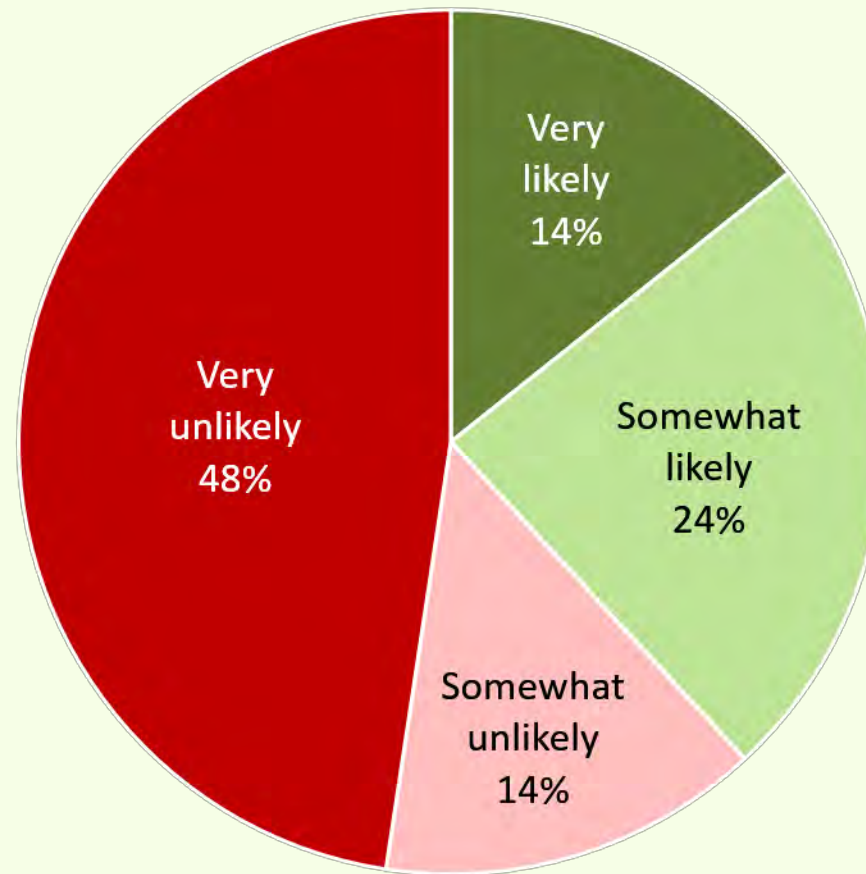
RECENTLY-ACTIVE FRIENDS REMAIN UNCONVINCING

If a friend had just returned to a favorite activity of yours, and told you it was safe for you to do so, how much more likely would you be to re-engage in that same activity? ... Attend an open house for a home listed for sale



RECENTLY-ACTIVE FRIENDS REMAIN UNCONVINCING

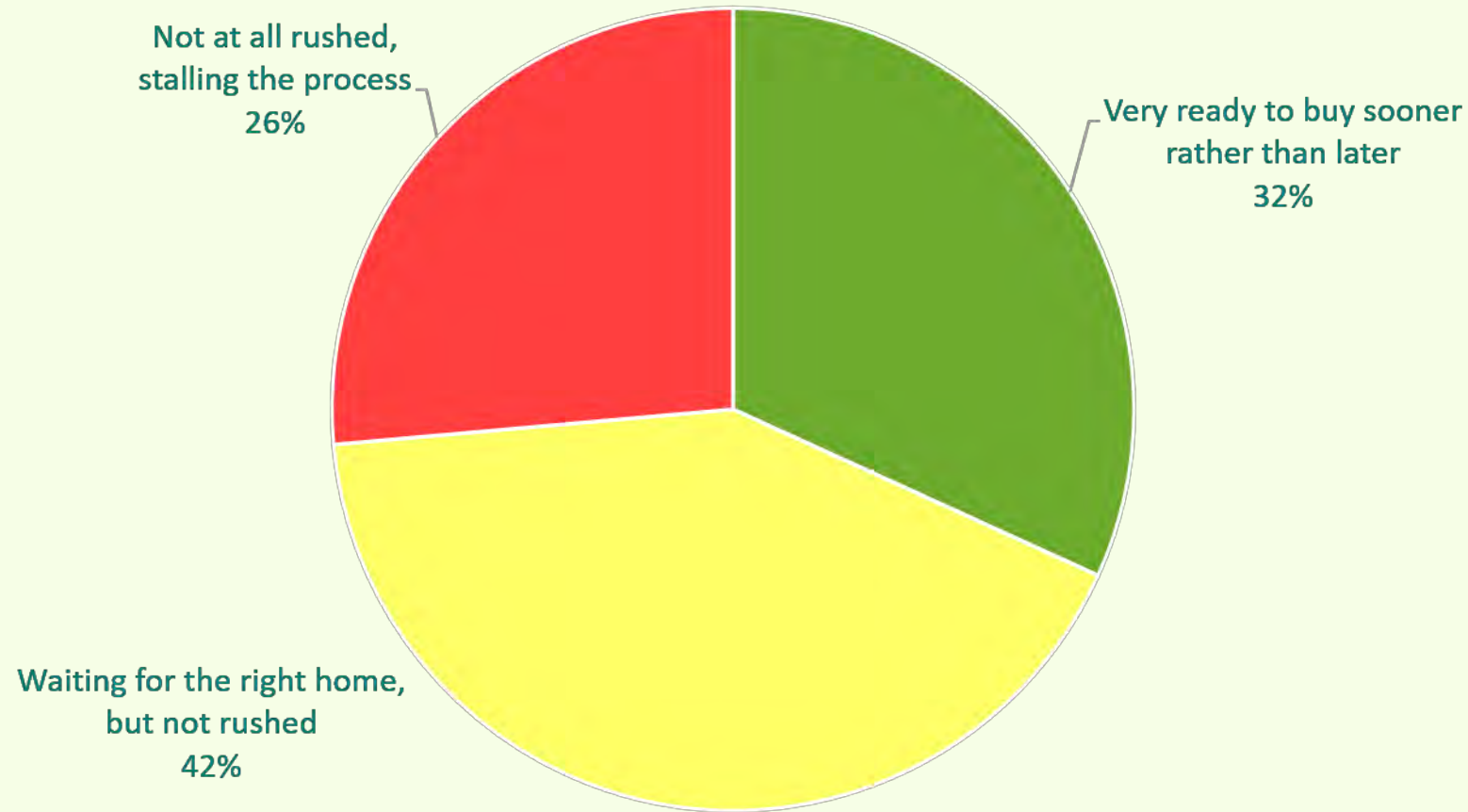
If a friend had just returned to a favorite activity of yours, and told you it was safe for you to do so, how much more likely would you be to re-engage in that same activity? ... Tour a home listed for a sale (outside of an open house)



NAR

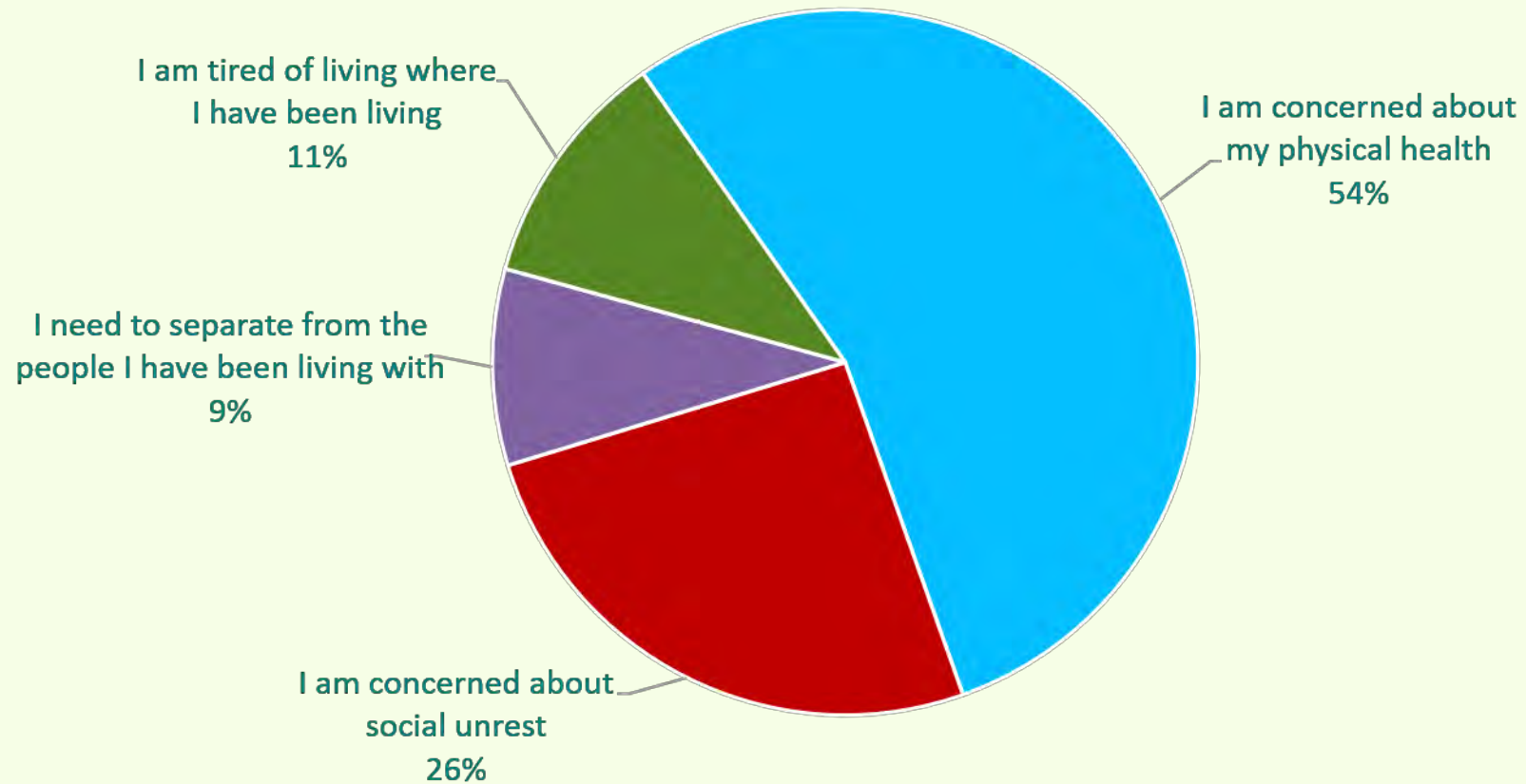
PLURALITY WAITING AND NOT RUSHED

When thinking about the pace of your home search process, do you feel...



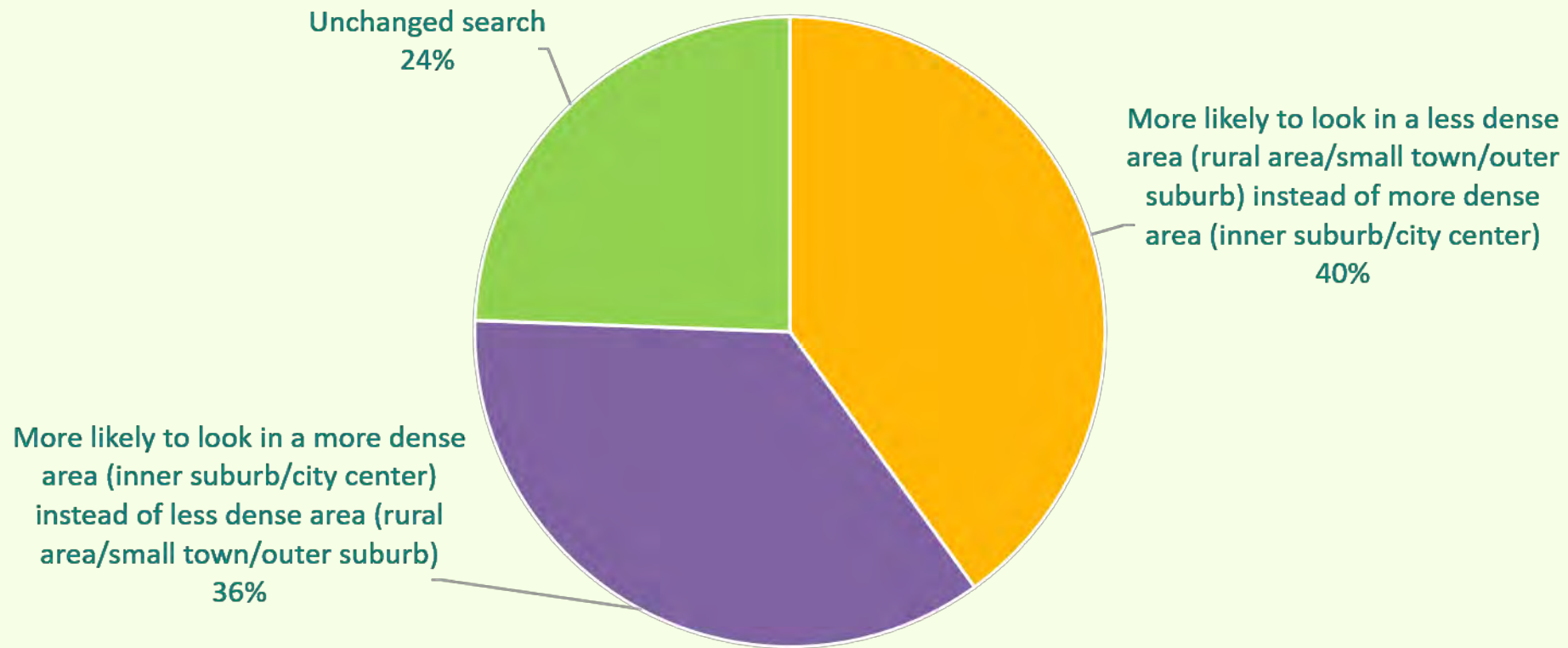
CONCERN ABOUT PHYSICAL HEALTH DOMINATES

Which reason comes closest for why you are so ready to move?



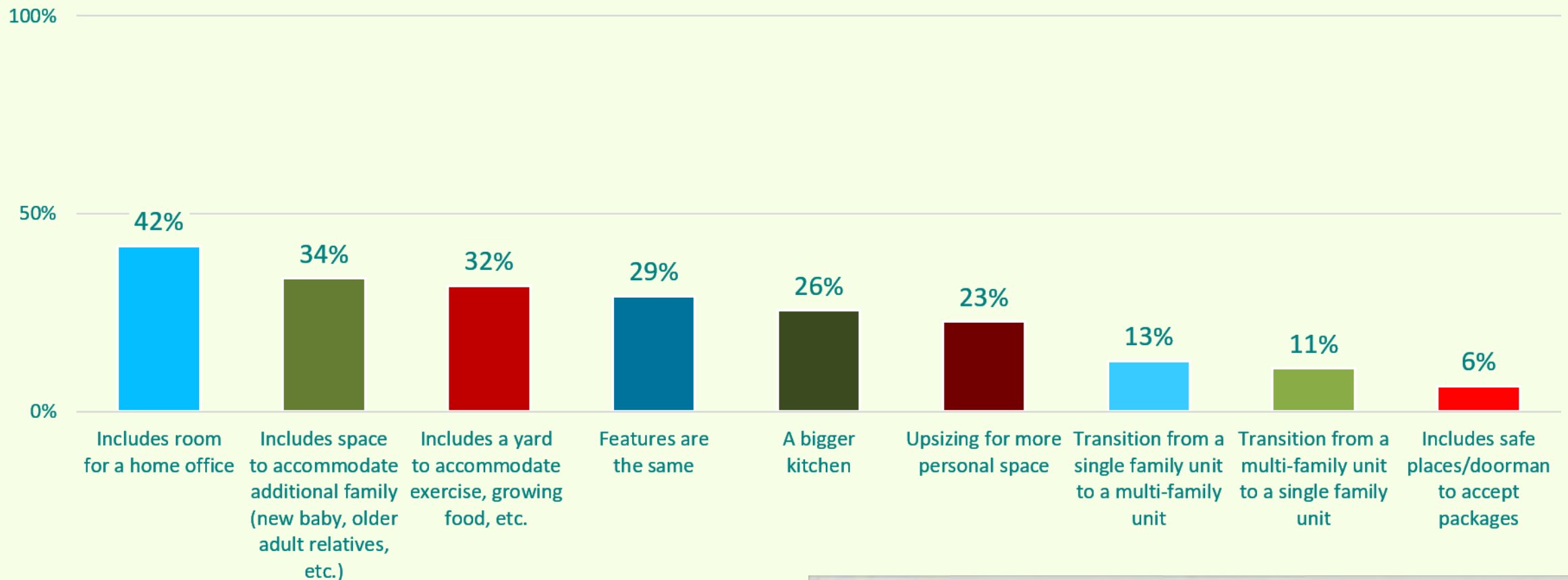
PLURALITY LOOKING IN LESS-DENSE AREAS

As you re-enter the home buying market, how, if at all, are you expecting your search location to change?



THEY'RE LOOKING FOR A HOME WITH AN OFFICE

As you re-enter the home buying market, which of the following home features may be important to you that were not important prior to the pandemic?



QUESTIONS?

- What questions do you have about the findings?
- What should we ask in wave 7?
- What are the biggest open questions you're facing now?

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