

**SPORTS &  
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# BACK-TO-NORMAL BAROMETER

ARE WE THERE, YET?

Public Opinion Insights from the April 12, 2021 “Back-to-Normal Barometer”

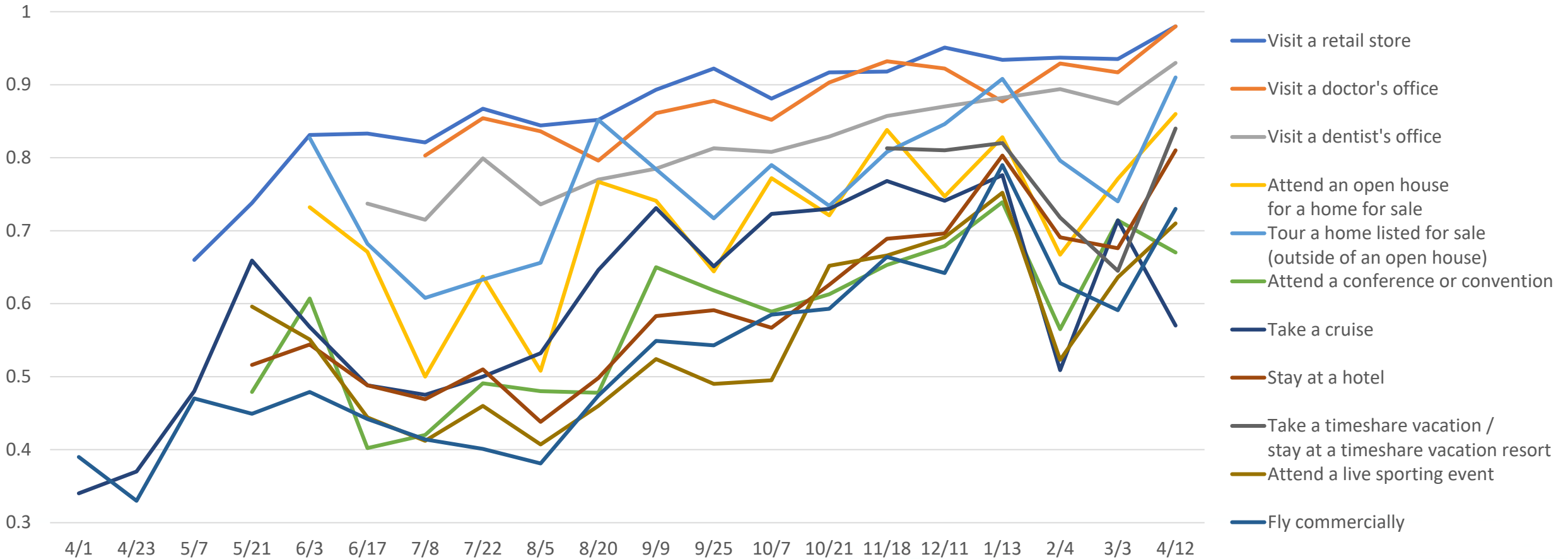
2021

Ron Bonjean, Partner, ROKK Solutions  
Jon Last, President of Sports & Leisure Research Group  
David Klein, SENIOR Partner, Sports & Leisure Research Group

# Category Engagement Over Time\*

# BACK-TO-NORMAL BAROMETER 2021

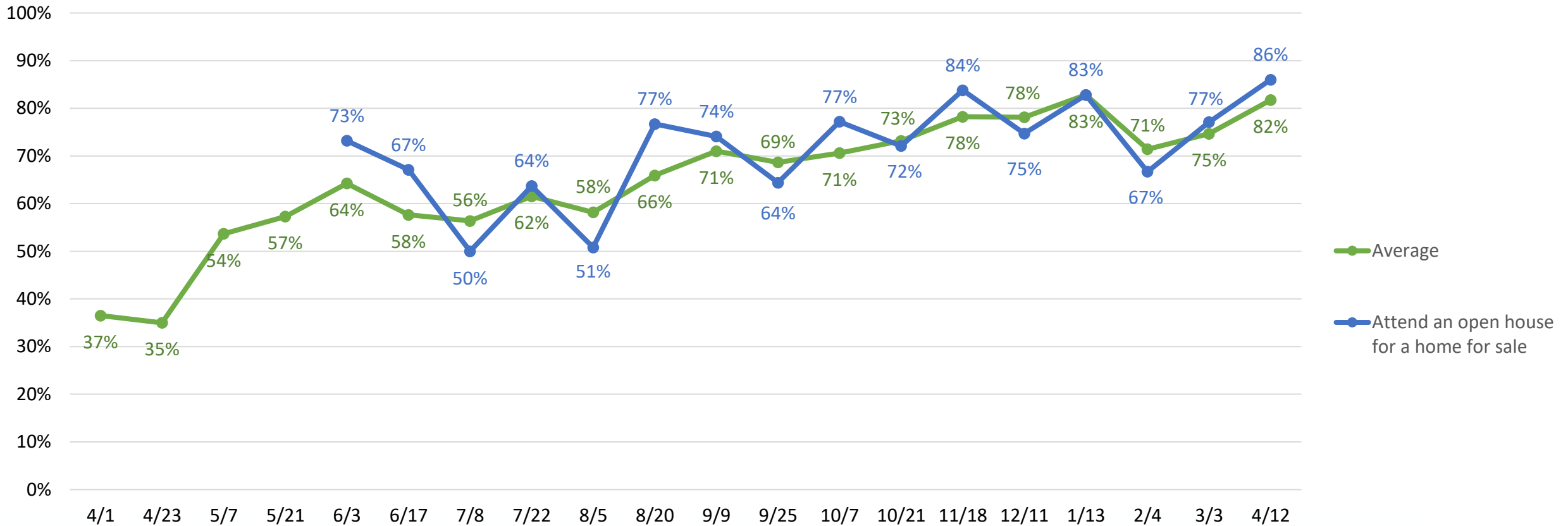
[Among those who have done this activity in the past 12 months:] For each of the following activities, please indicate which of the following conditions is closest to your current point of view: Recently active + Ready to go



# Open House Versus Activity Average

## BACK-TO-NORMAL BAROMETER 2021

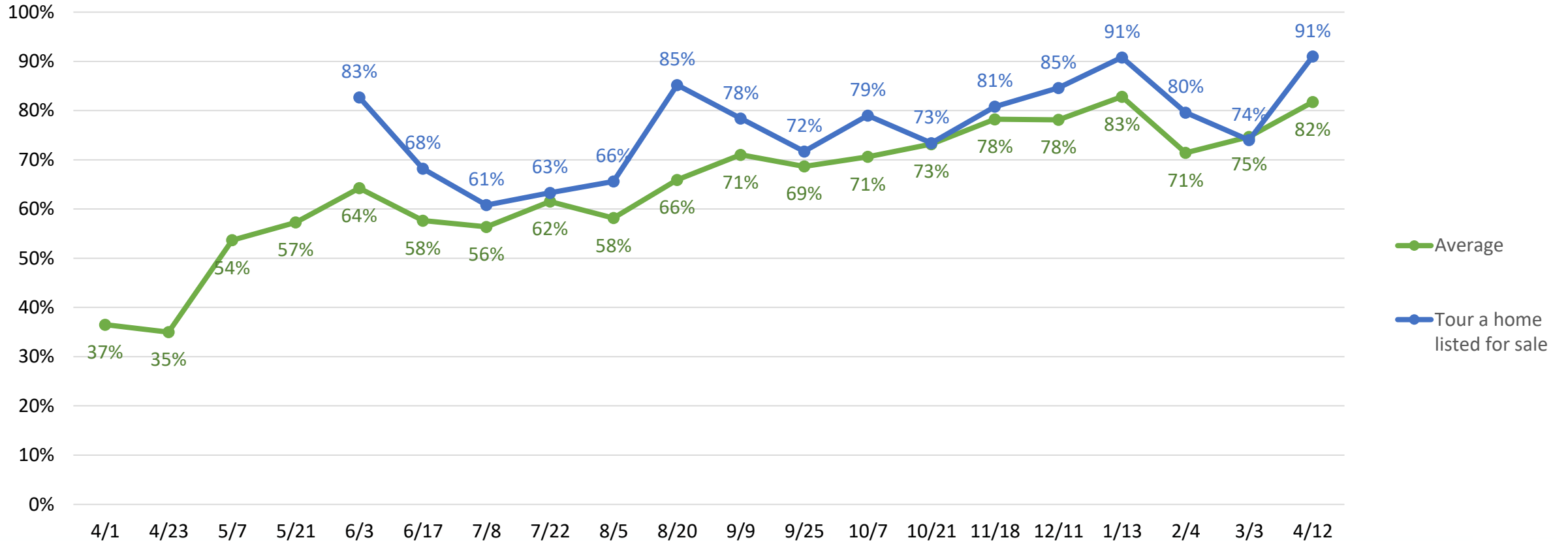
[Among those who have done this activity in the past 12 months:] For each of the following activities, please indicate which of the following conditions is closest to your current point of view: Recently active + Ready to go



# Tour a Home for Sale (other than open house) Versus Activity Average

## BACK-TO-NORMAL BAROMETER 2021

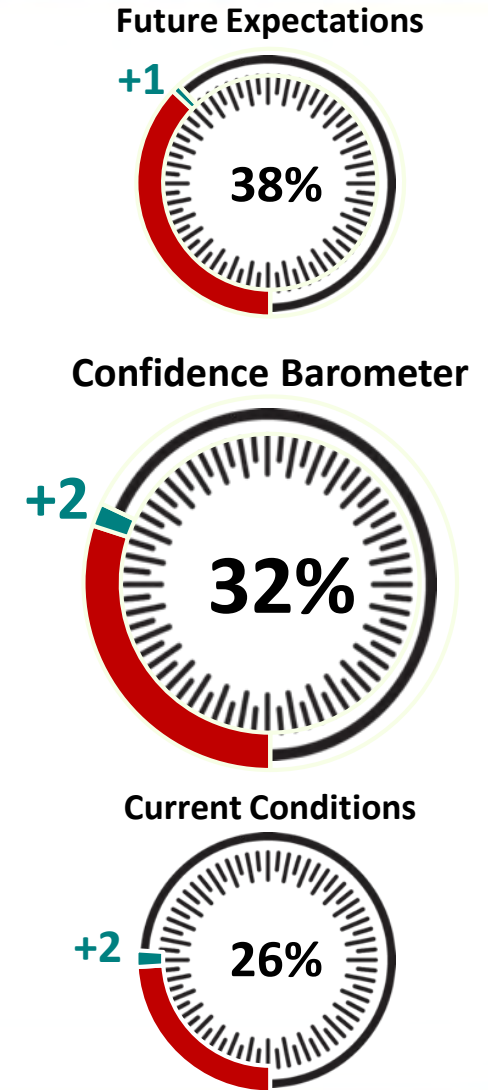
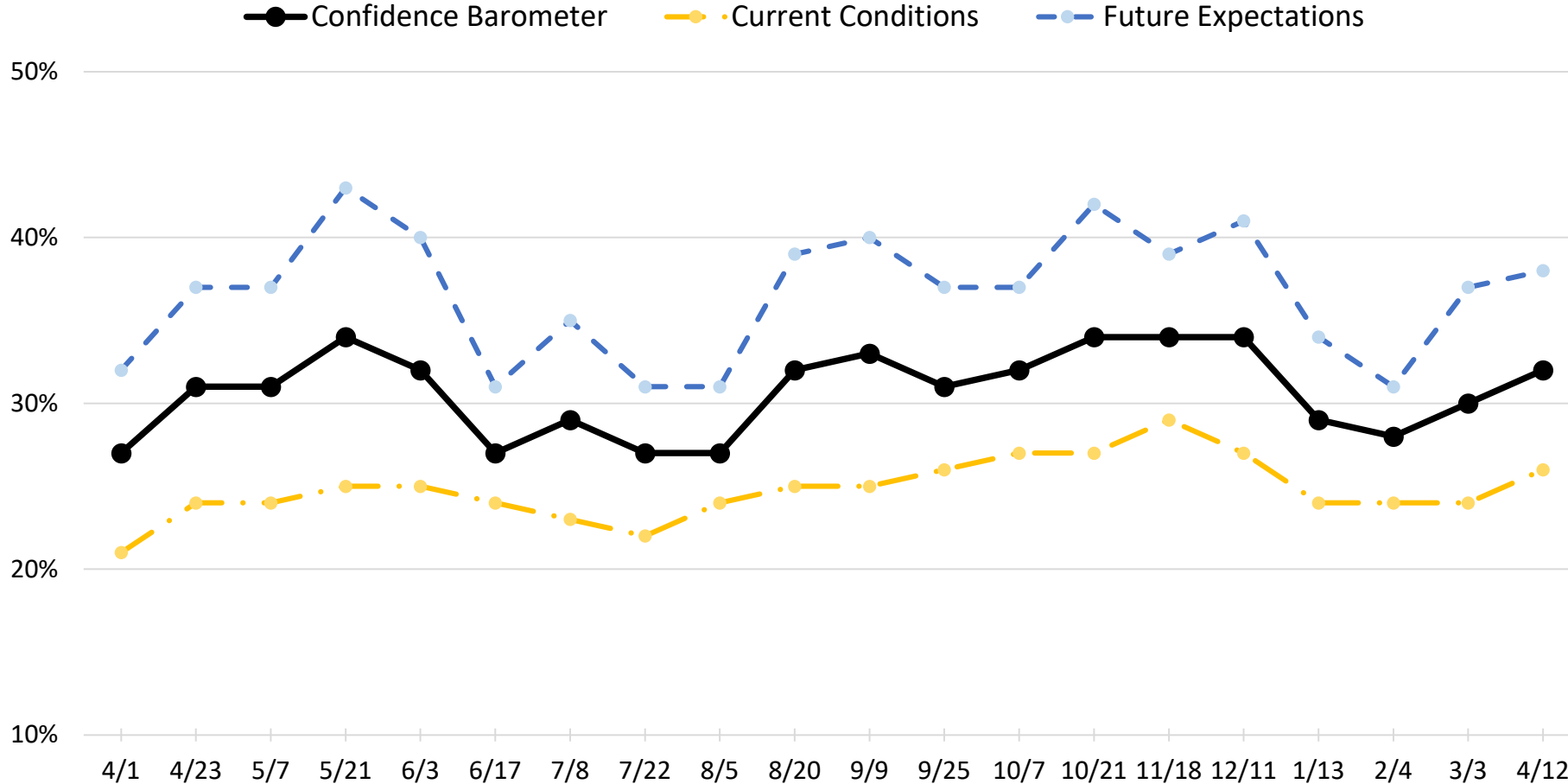
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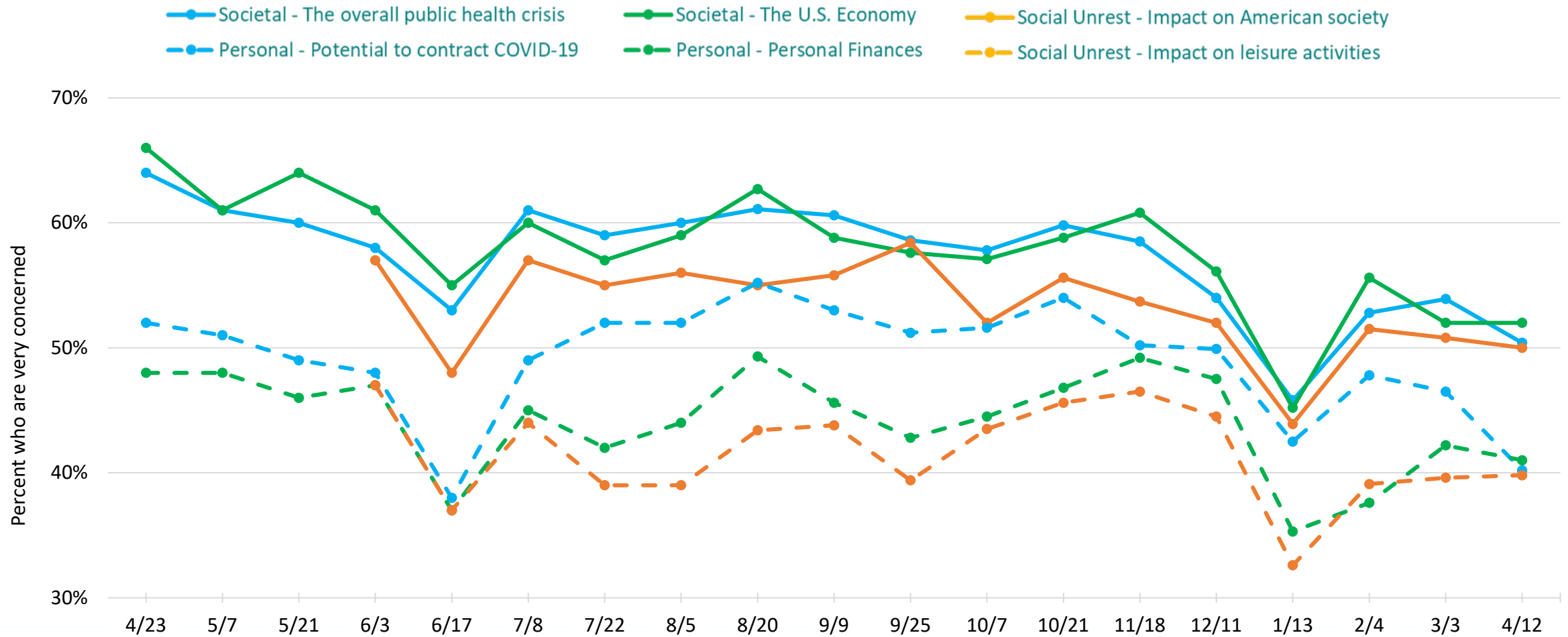




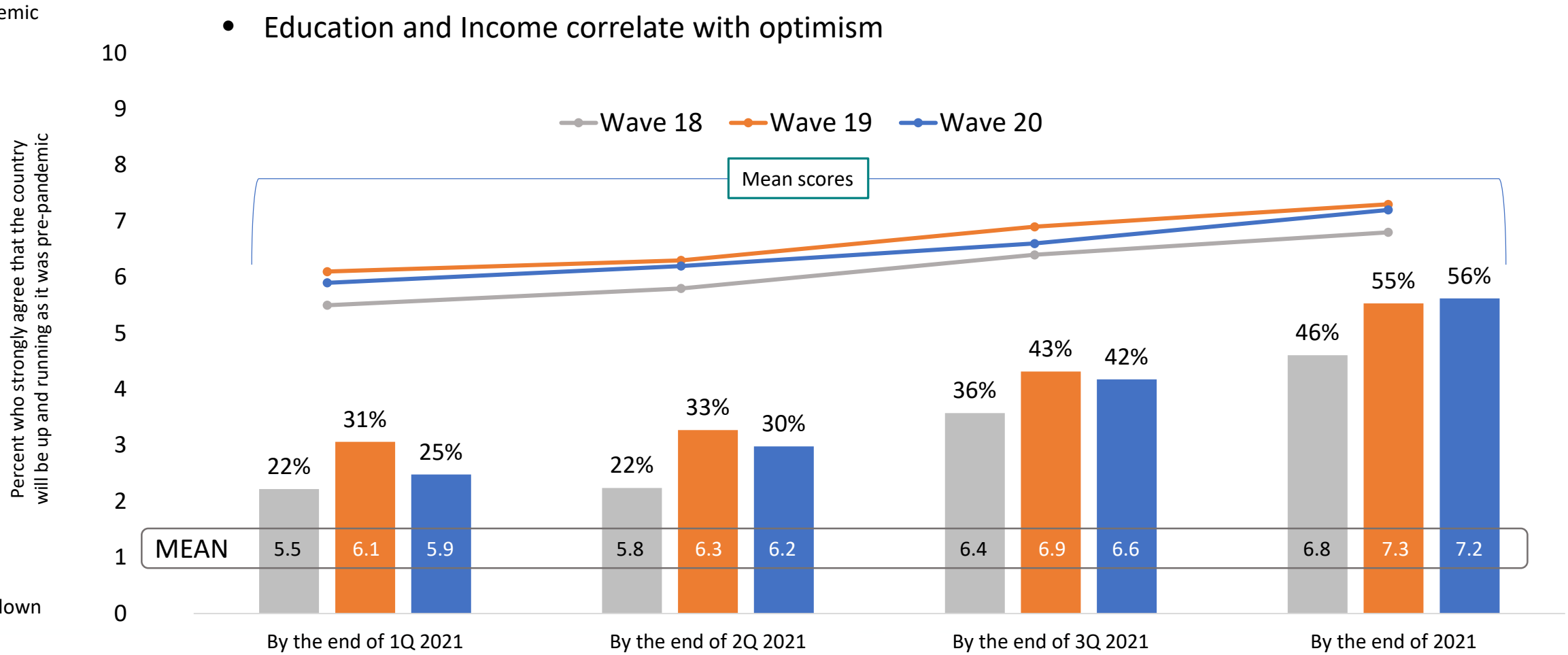
# April's Uptick in Confidence was Fueled by Modest Gains in Current Conditions and Future Expectations

## BACK-TO-NORMAL BAROMETER 2021





- Men more bullish than women
- Education and Income correlate with optimism





# BACK-TO-NORMAL BAROMETER 2021



“LET ME OUT”

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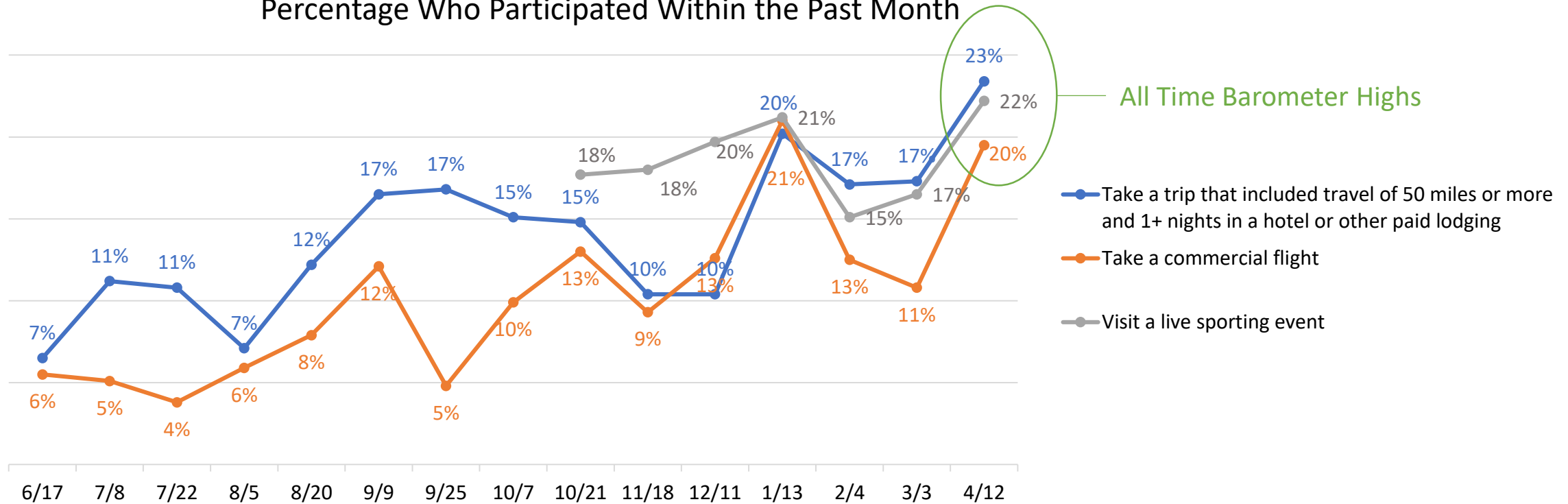
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Of these activities that you have participated in over the past year and a half, how recently did you participate?

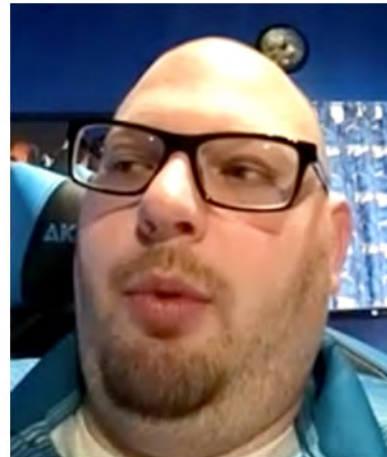
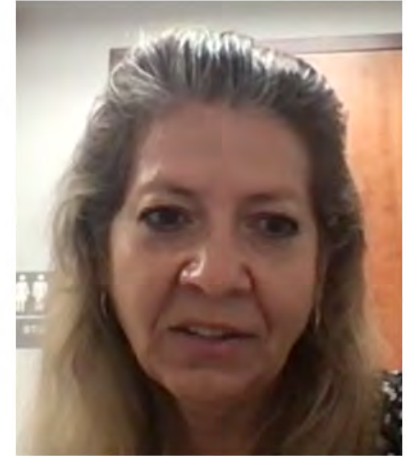
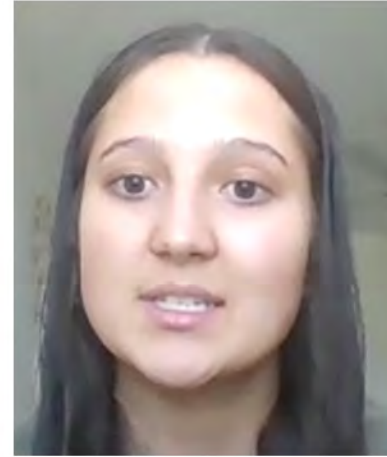
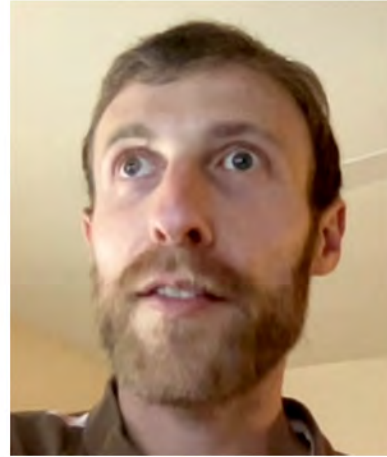
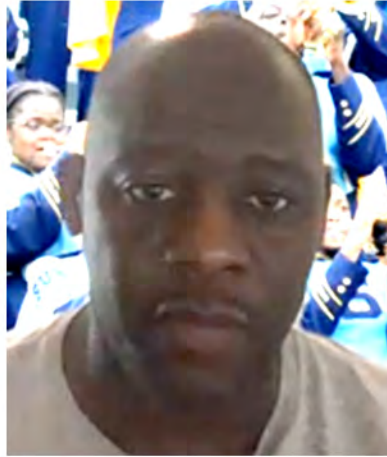
Percentage Who Participated Within the Past Month



All Time Barometer Highs

- Take a trip that included travel of 50 miles or more and 1+ nights in a hotel or other paid lodging
- Take a commercial flight
- Visit a live sporting event

- A third plan to take their next vacation by June of 2021
- 45% strongly agree (62% total agreement) that anyone who wants to go to a sporting event, should be allowed to go—up from 35% in wave 19
- Men out-index women across all activities



People are either travelling or planning to in the near future with less fear based on what they have experienced and their own personal responsibility



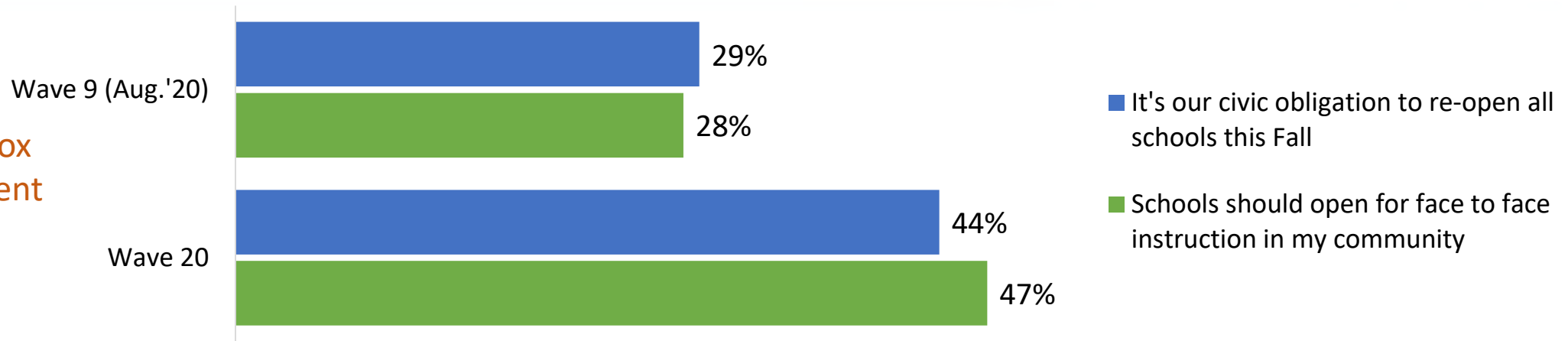
*"I went to Vegas in November...wearing a mask, very much put me in control. So I felt very like when I'm in control of the situation, I felt very comfortable there."*

*"I am part of a mini-community of cruisers..I am hopefully going on a Cruise in June... for people that don't cruise, they may not understand this, but the cleanest place you can be is on a cruise ship. because when you wake up, when you go to sleep, when you're dreaming, one thing that you hear and see is people cleaning all the time. When you go eat I still have this in my mind to this day, people walking around with hand sanitizers saying washy washy, no sticky sticky."*

*"I was probably on a plane 10 times last year during the height of Covid; we went to Mexico and Florida. We traveled quite a bit, which was advantageous, because not many people were traveling. So it was much easier to get around."*

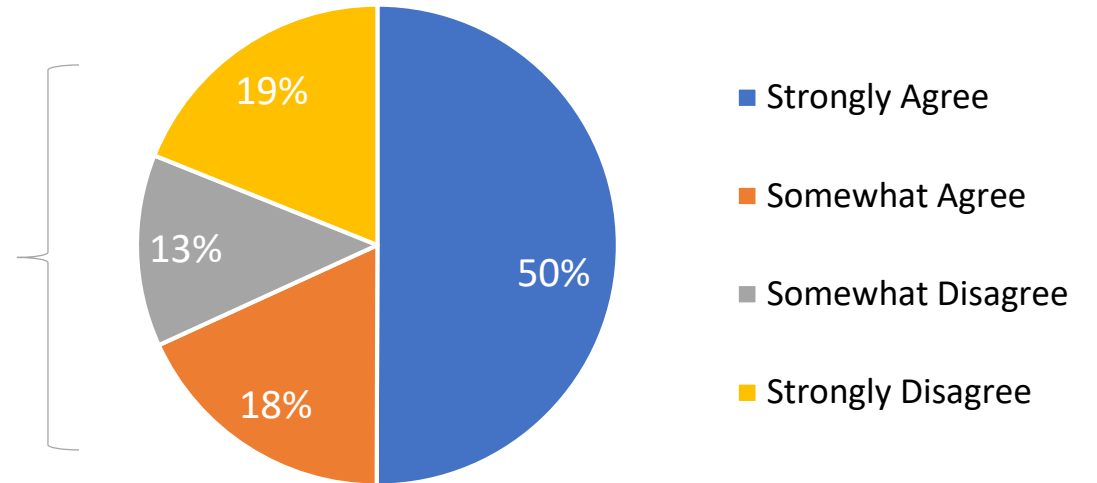


## Top 3 Box Agreement



*“Rutgers and Brown are within their rights in requiring vaccinations to return to campus this Fall”*

I support universities and colleges mandating all staff and students be vaccinated for COVID in order to return to full face to face operations







*“My professors are able to record classes right now which is really nice being able to watch them back and doing homework. So I feel like that is something that could be started... professors would start recording...open note tests are huge right now.”*

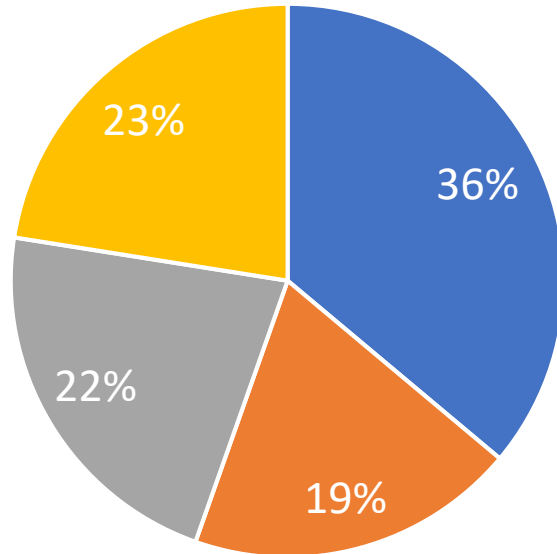
*“I have not learned nearly half what I've learned in any other in person semester. It's hard to pay attention. I would like to sit next to people in class and not have to sit so far away and have to yell.”*

*“As a professor, I like it because it forces the student to actually be proactive. Whereas from the student perspective, a lot of students don't like being proactive. Students are like kind of...walking around Haze and say, ‘Oh I have class today they're gonna tell me everything what to do. There's just gonna download it in my head.’ It's even more of a challenge.”*

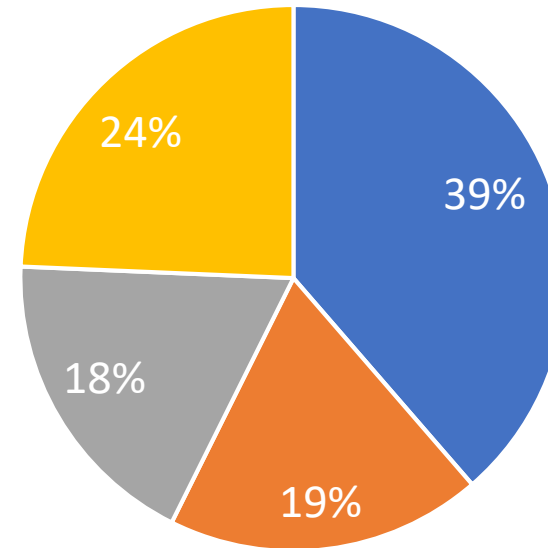
*“The kids need to be back. Yeah, they're suffering; they're not getting the knowledge and a lot of the parents work. We need to figure a way to get them back in school so that they can learn...they're losing a lot...they're not learning, so it's time.”*

# Who was “Right” on Lockdown Strategies? It’s Not Clear Cut

Balancing the public health impacts with the economic impacts, government lockdowns and limitations on public gatherings outside the home, during the pandemic, have been a net positive for the country



In thinking about the variations in health and safety protocols put in place in different regions of the country, I believe that the more restrictive policies of states like New York and California have been more effective in providing for the overall well being of its citizens than those in states like Florida and Texas



- Strongly Agree
- Somewhat Agree
- Somewhat Disagree
- Strongly Disagree



*“I agree with New York and California because I used to live in Texas and actually travel to California during the pandemic. California actually took it serious. One of my family members who died in my family lived in Texas. At the end of the day, that's what matters to me.”*

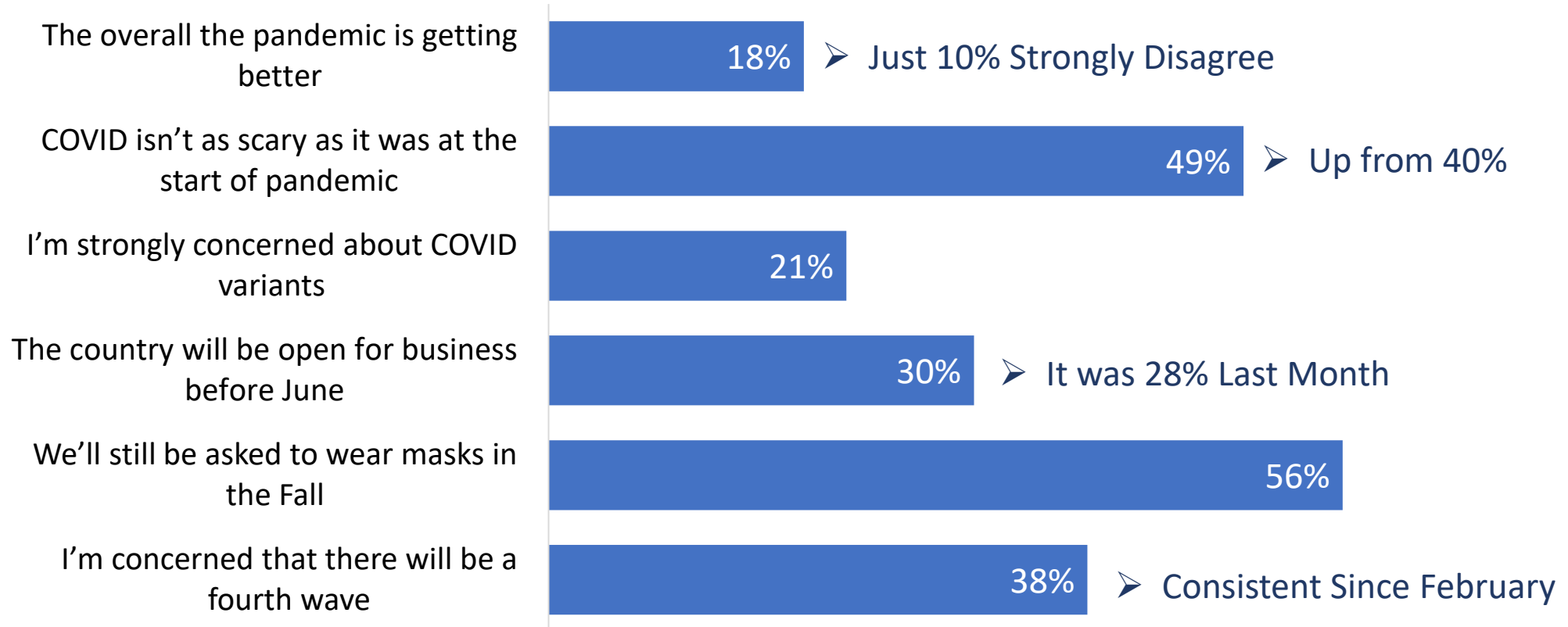
*“From a health perspective I like the cities and states that are more restrictive and cautious...that's what we need. Saw Ft. Lauderdale opening to Spring Breakers and I don't want to sound like the old guy, but they don't know what we are up against with these beach parties and hooking up.”*

*“I understand that preserving life is our top goal, but we failed to realize that mental health is important too...Locking people in their homes is detrimental to all.”*

*“If you have a state, where you can take care of people at risk, And the people who are not as much at risk...Those people you don't have to shut down the entire world for those folks.”*

*“We have a lot of people that come here [Arizona] from California because they can't do anything where they live, right? So they're doing what they're supposed to be doing in their own state, but then they're coming here and they're not wanting to wear masks. They want to go out. They want to do all the stuff so are they really doing what they're supposed to be doing to protect everybody? No, just in their state.”*

## TOP 3 BOX AGREEMENT



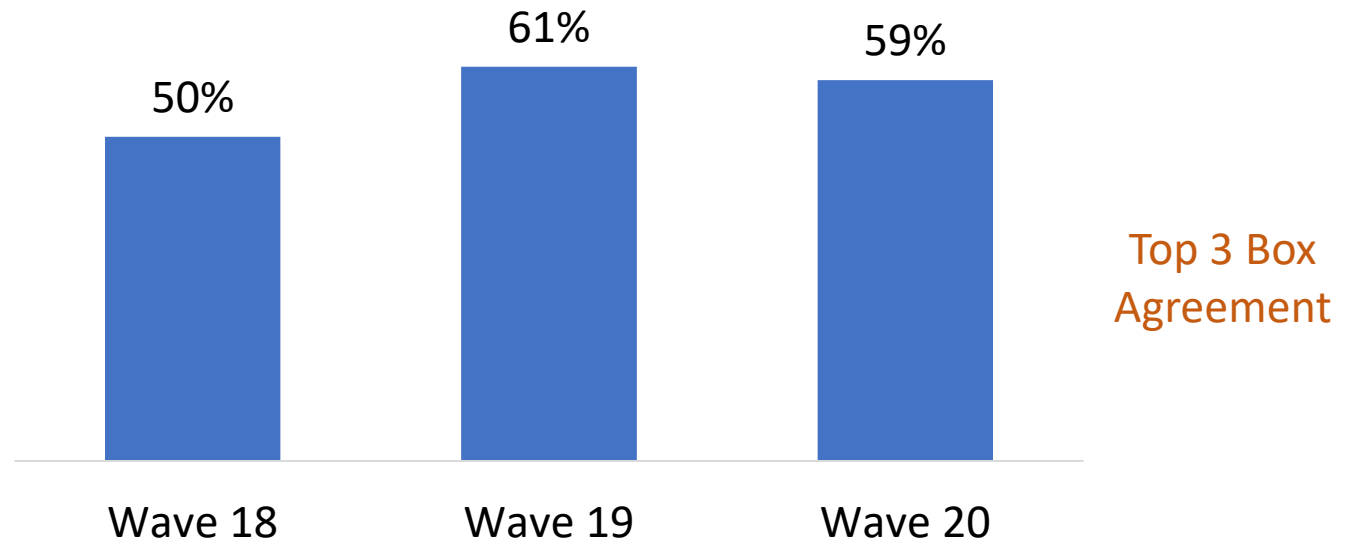


# BACK-TO-NORMAL BAROMETER 2021



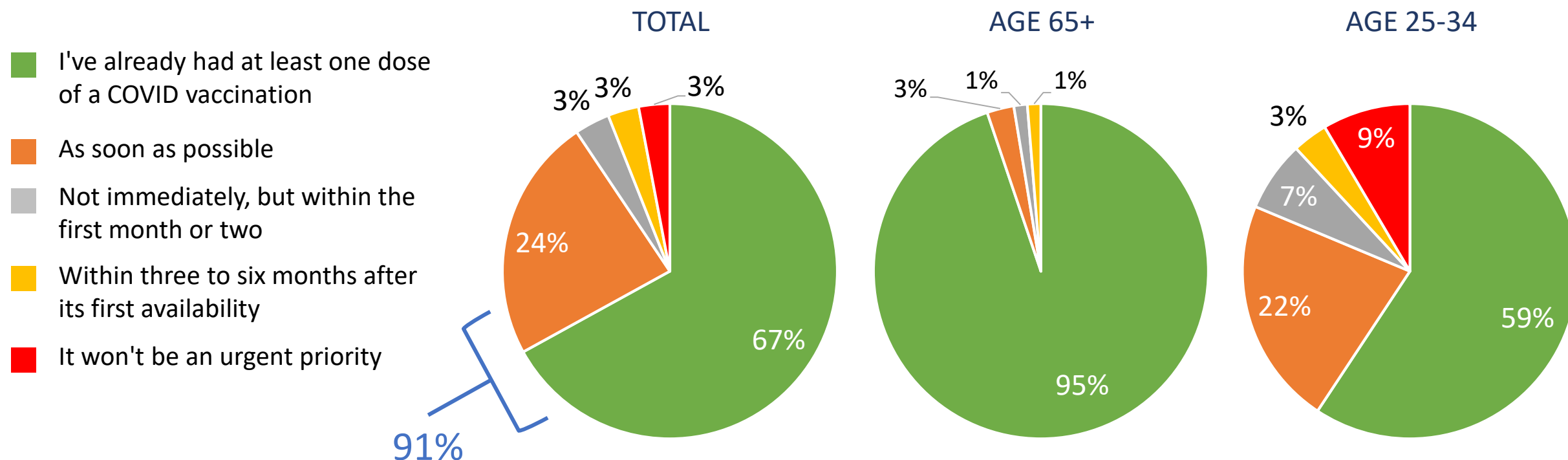
Vaccines: Are we Approaching Supply/Demand Equilibrium?

I have already or will definitely get a COVID 19 vaccine when it is available



# ...And Those Who Want a Vaccine, Have Likely Started the Process

Once a vaccine for COVID 19 is available, how soon will you attempt to get one?



- 71% think they will be vaccinated by June; Stable with 74% last month
- 72% see vaccines being widely available by June; Up from 65% last month
- 28% know someone who has lied to cut the vaccine line



# BACK-TO-NORMAL BAROMETER 2021



## The Future of Cities

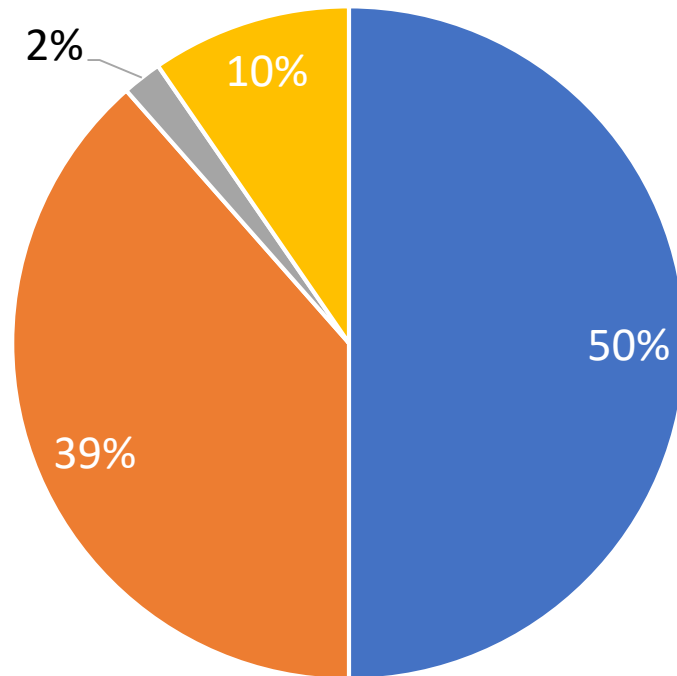
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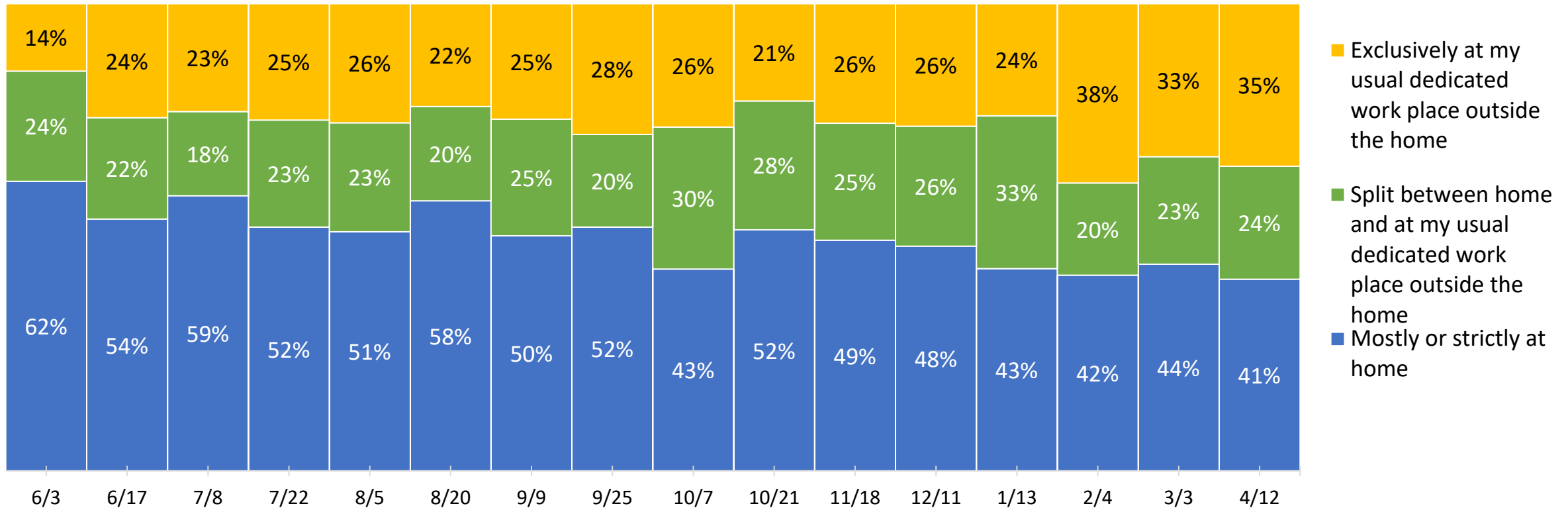


Which of the following best describes your thinking about a move to a less densely populated area?



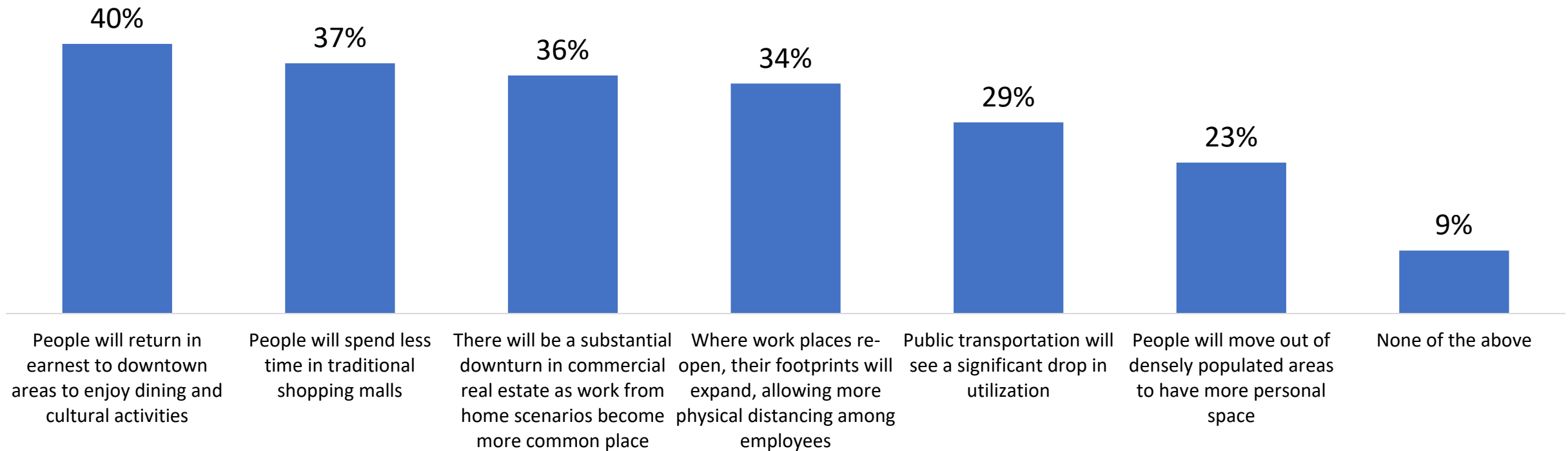
- This is a permanent lifestyle change
- I see myself ultimately moving back to a more densely populated area, but not for at least five years
- I see myself moving back to a more densely populated area within the next five years
- I'm really not sure how long I will stay. It's too early to tell.

Are you presently working from home or in a dedicated work place?



➤ Of those working from home, more than half expect to be back by June!

Which, if any, of the following do you think will happen or continue to happen, once the pandemic is over?





## THE OUTLOOK IS TEMPERED OPTIMISM

- Downtown residents are emerging from lockdown
- Gatherings in Downtown are resuming
- Alternate use leasing will result in new tenants

*"We see a lot of people going from Boston to try and buy property in NH. When properties get vacated in cities, they'll get scooped up and it will be filled with others."*

*"We always see people get tired of the city and ready to come out and be somewhere new...and always a younger generation wants to continue to move to the city."*

*"We have this thing called First Friday, this big Festival where they have all this art stuff...it's a madhouse and if you live downtown, this last Friday was first Friday. and there were people everywhere; it's gonna get bigger and bigger and bigger."*

*"I think people will come back...eventually they'll see it isn't the normal and it won't be as good as they remembered. I went to a sports bar and I looked and there were a lot of people so I didn't even stay an hour. I thought I missed the ambiance and music, but when I started looking around, I wasn't as comfortable as I was anymore."*

*"I don't think there's going to be much long-term difference. I mean already, walking around or biking around downtown [San Diego]--it's busy. It doesn't really look that much different than it looked. Before Covid."*

*"Some downtown hotels are renting rooms. For workspace. Just to get you out of your house and get in a different atmosphere, they're allowing people to have these rates at our hotels."*



# BACK-TO-NORMAL BAROMETER 2021

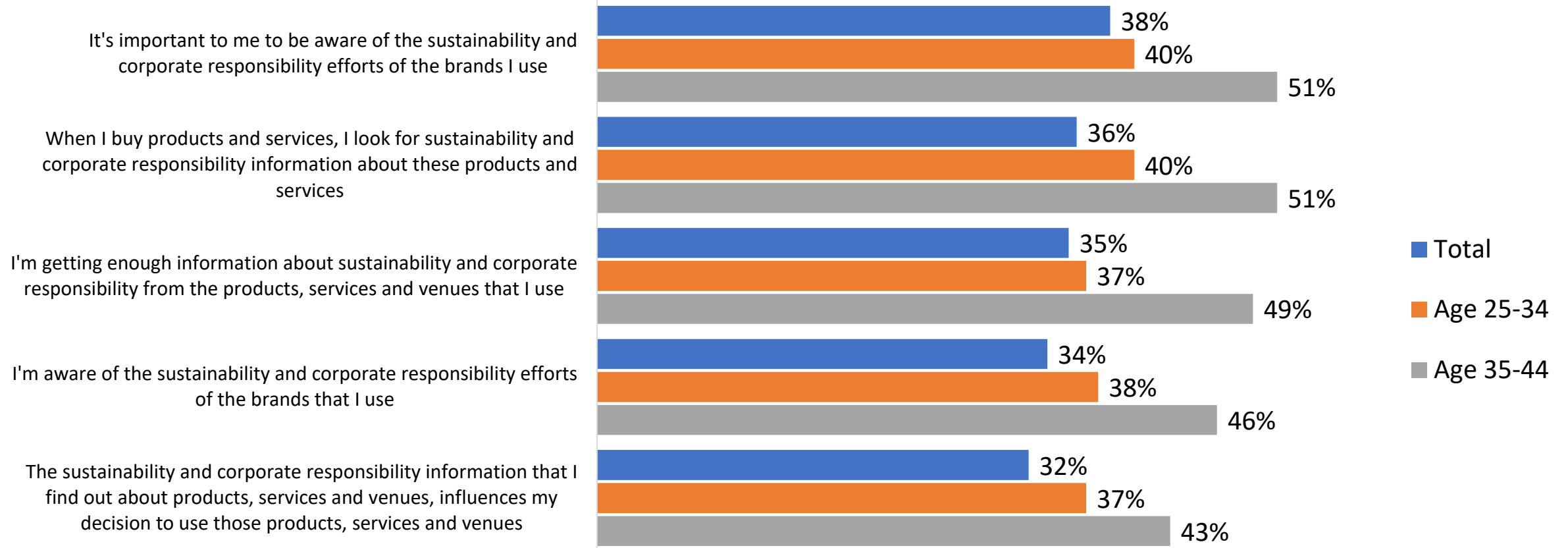


Other Items of Interest

# Over A Third Of The Country Is Highly Attuned To Sustainability Issues

BACK-TO-NORMAL BAROMETER 2021

## TOP 3 BOX SUMMARY

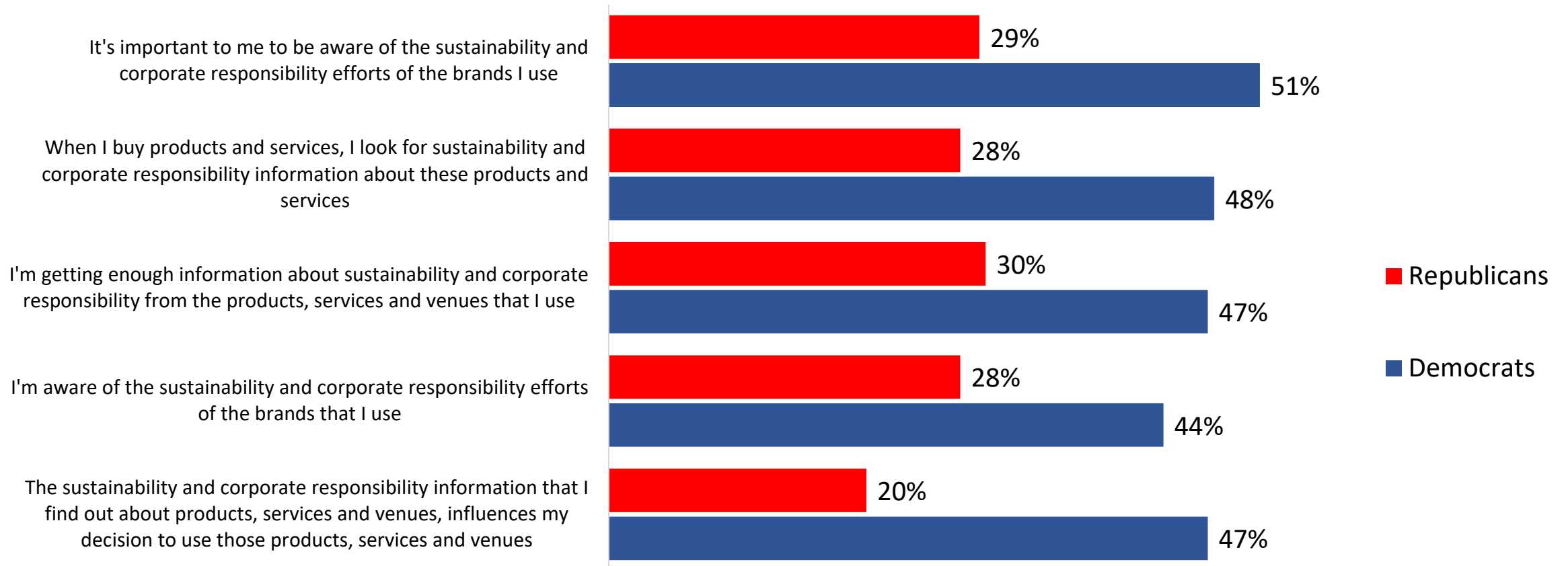


- Sentiment is particularly stronger among the younger generations

# A Partisan Divide is Clearly Apparent Across these and Other Social Issues

BACK-TO-NORMAL BAROMETER 2021

## TOP 3 BOX SUMMARY

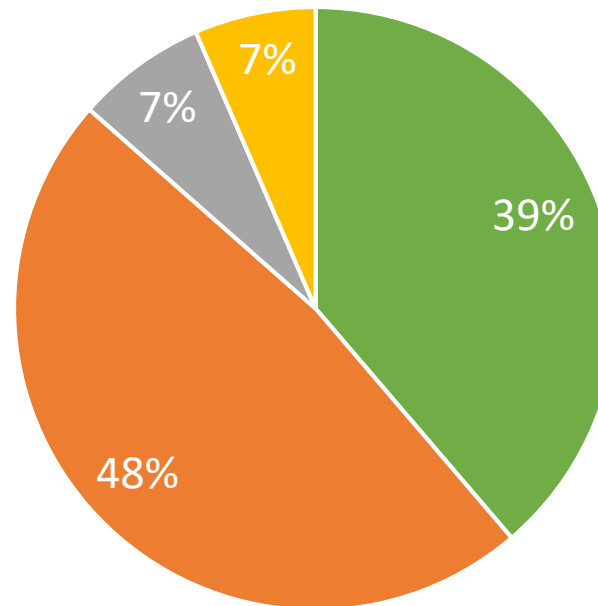


# A Partisan Divide is Clearly Apparent Across these and Other Social Issues

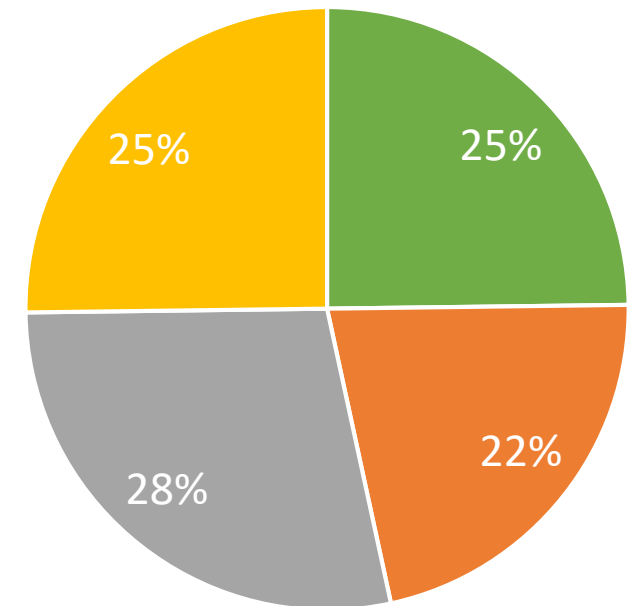
BACK-TO-NORMAL BAROMETER 2021

Which of the following best represents your feelings about the speed at which companies, in general are taking action to address climate change?

- They are moving quickly and that is something that I appreciate
- They need to move more quickly for me to be satisfied
- I feel that they are moving too quickly
- They are not moving quickly, but that is fine with me



DEMOCRAT



REPUBLICAN



Without credible examples of commitment, these efforts are less appreciated

What constitutes commitment?



- Are companies making actual investments or are they jumping on the bandwagon?
  - Investments of \$\$\$
  - Investments of time
  - Investments linked to purchases
- Does the cause fit with their brand?
- Can the company demonstrate “a better world” as a result of their efforts?

Social media is a key platform for communicating company values, especially among young adults

*“Not really something I look at. I like that they are trying to make the world a better, safer and healthier place...but selfishly when I go out, I don't look for it.”*

*“I like that they say where they stand,...but if it's going to benefit their profit margin or how they look to the public, they'll say anything...I'm scarred by it. The CEO is dumping oil off his yacht.”*

*“I've noticed more and more people out there concerned about the environment and wanting companies to take responsibility for that...Wasn't big through the 80s and 90s and now all of a sudden we have to worry about the environment..but that's what people are doing now. I see a lot of talking....emails, etc. Anybody can throw a number out there, but show me something substantial. Right now it's a lot of talking and not a lot of action in that direction.”*

*“They don't have an obligation, but if a company values something, you should speak out about what you are proud of. Why wouldn't you share that with the community? Why not shout it to the world? For me personally, the companies that I seek out, I understand what they stand for. Otherwise it's just a building.”*

*“They're saying the right things, but I think the difference now is, as young people say, I want to see the receipts? It takes time and I think that's the one thing that a lot of people don't understand how this works.”*

*“The hospitality industry is supporting my vision that we still need your mask. Even though that the governor says, we don't have to. I feel like they are supporting my feeling that I want to feel safe.”*

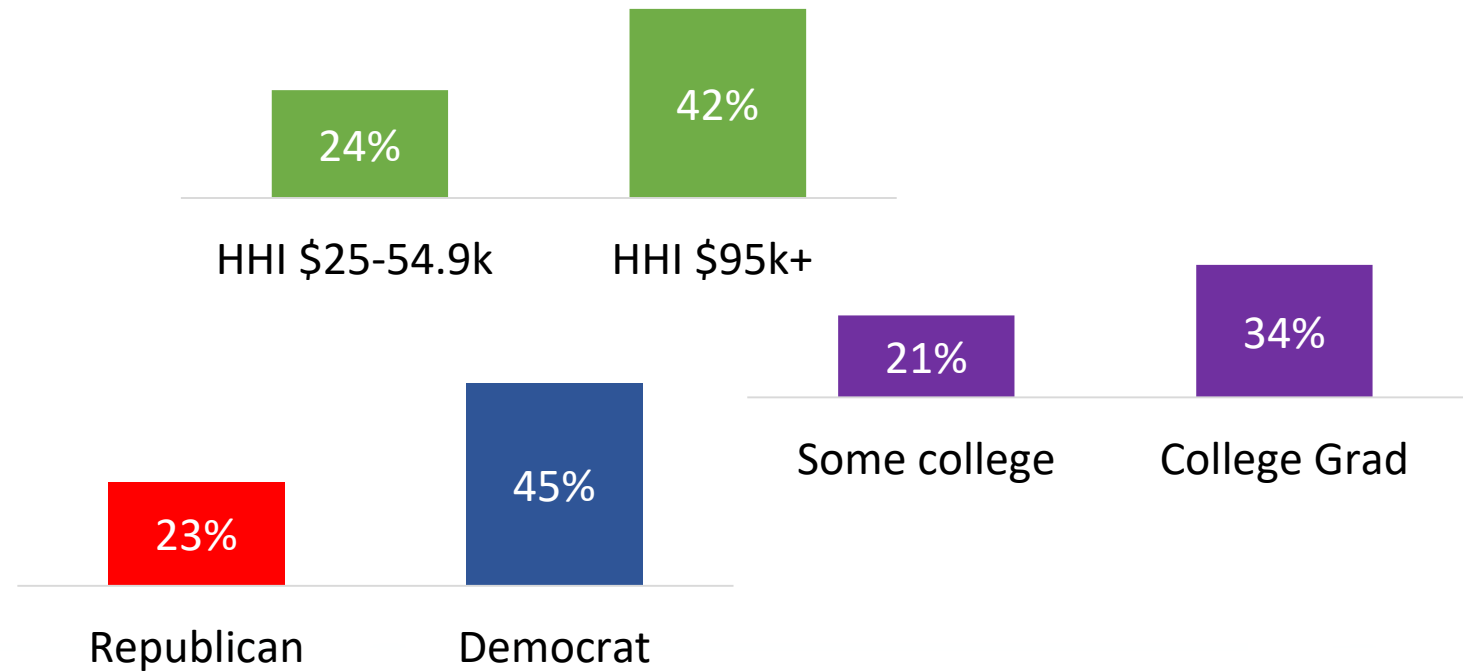
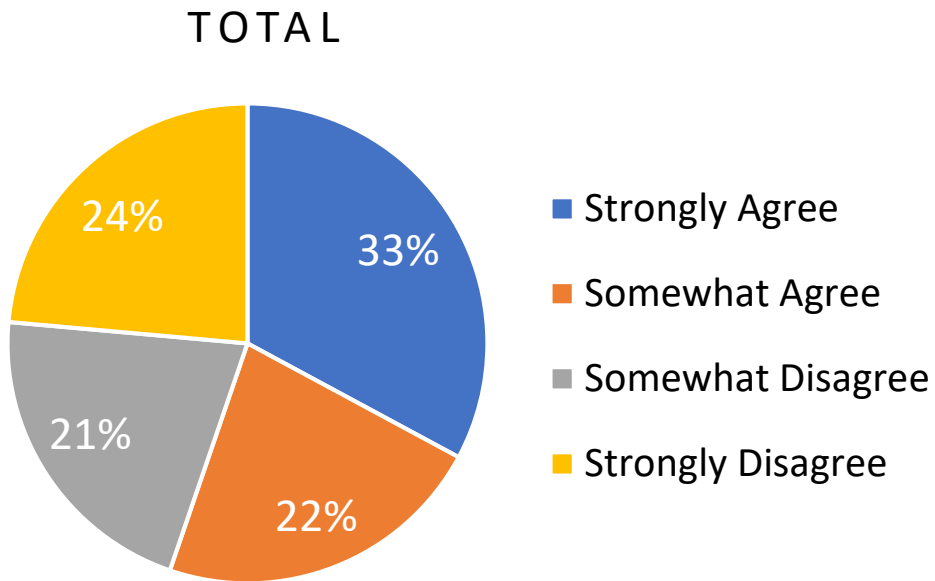
*“Pepsi going to zero emissions, Ocean bracelets cleaning three bags from the ocean with each purchase...Trader Joe's using reusable and paper bags...I see them on social media and see people saying, a company just did this and seeing that, I feel more inclined to buy things from them.”*

*“We're getting softer and more sensitive. and I think that consumers will make buying decisions based off of the perceived image of a company. Not me in particular, but if it's something that is just grossly against my morals and beliefs. Yeah, I'm not going to support you.”*

I've been able to save money or accumulate more wealth during the pandemic

## MEANINGFUL VARIATIONS AMONG SEGMENTS

—Top 3 Box Summary—





# BACK-TO-NORMAL BAROMETER 2021



## National Association of Realtors

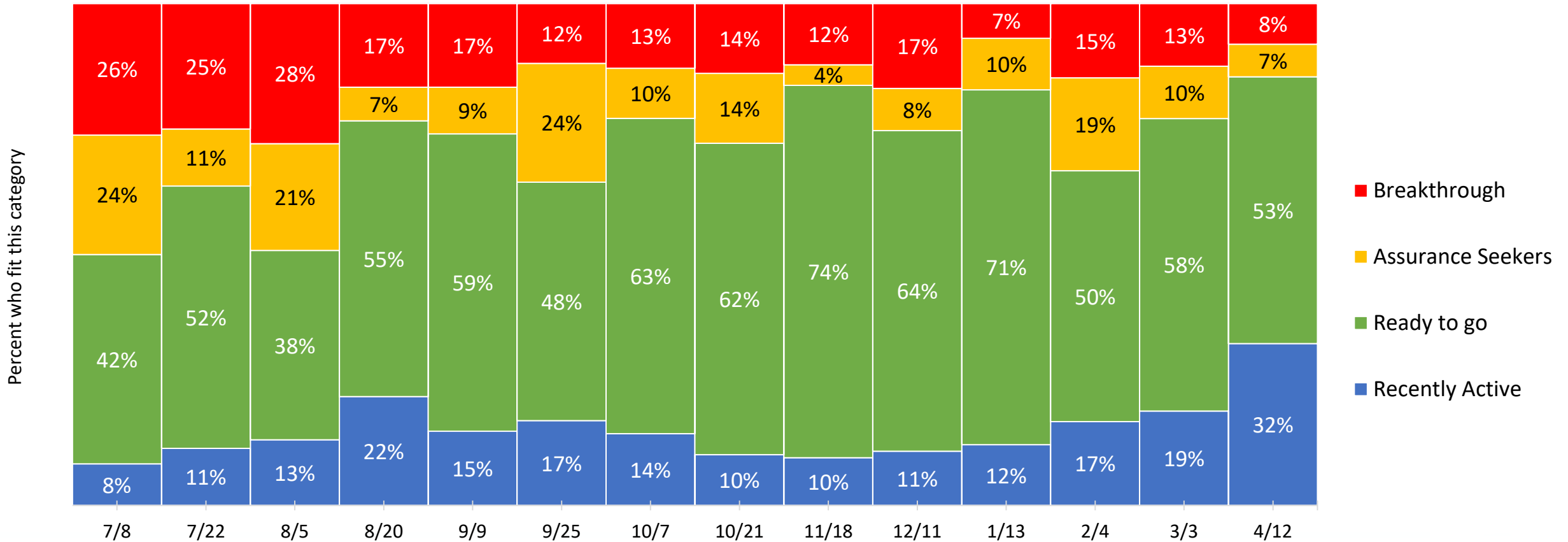
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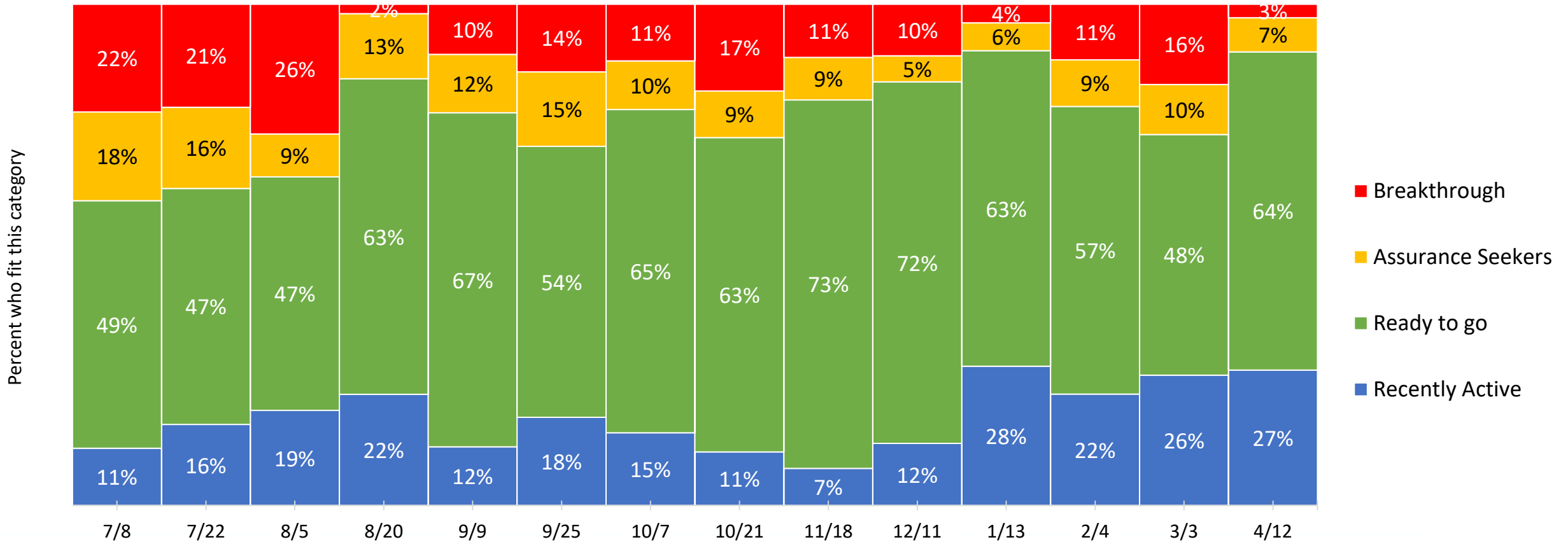
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Which of the following conditions is closest to your current point of view... Attend an open house for a home listed for sale



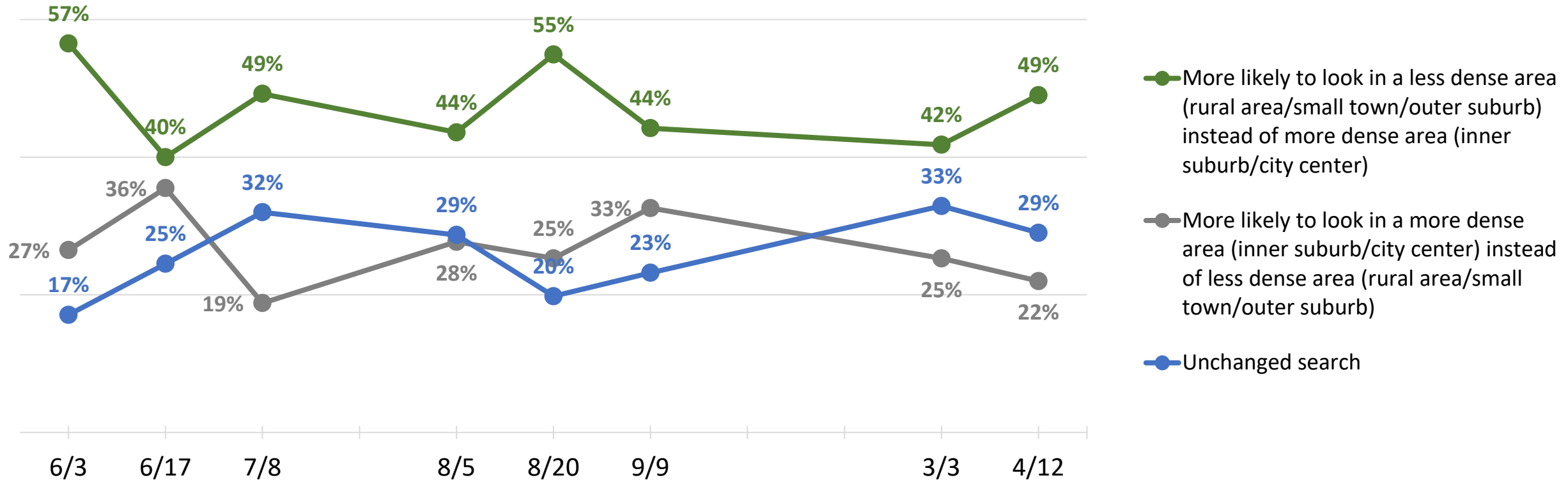
Which of the following conditions is closest to your current point of view... Tour a home listed for sale (outside of an open house)



# Desire to Relocate to Less Densely Populated Areas, Remains Most Prevalent

BACK-TO-NORMAL BAROMETER 2021

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

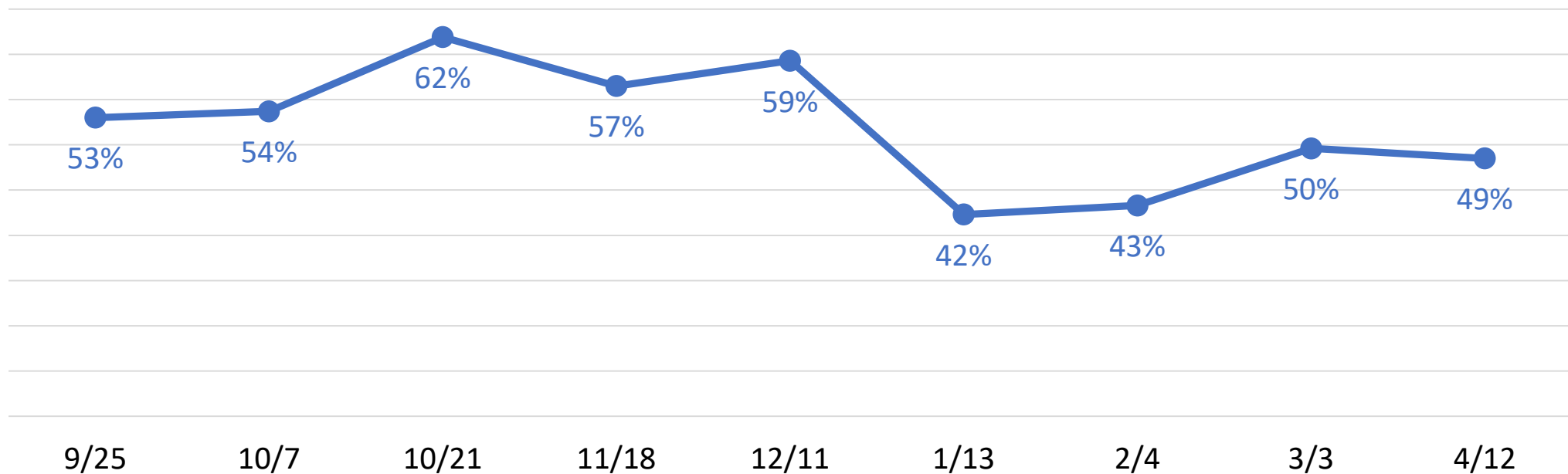


# Half of those Still Working from Home Strongly Prefer to Continue in this Fashion

BACK-TO-NORMAL BAROMETER 2021

[Among those who work mostly or strictly at home:] How eager are you to return full time to your workplace outside of your home, relative to three months ago?

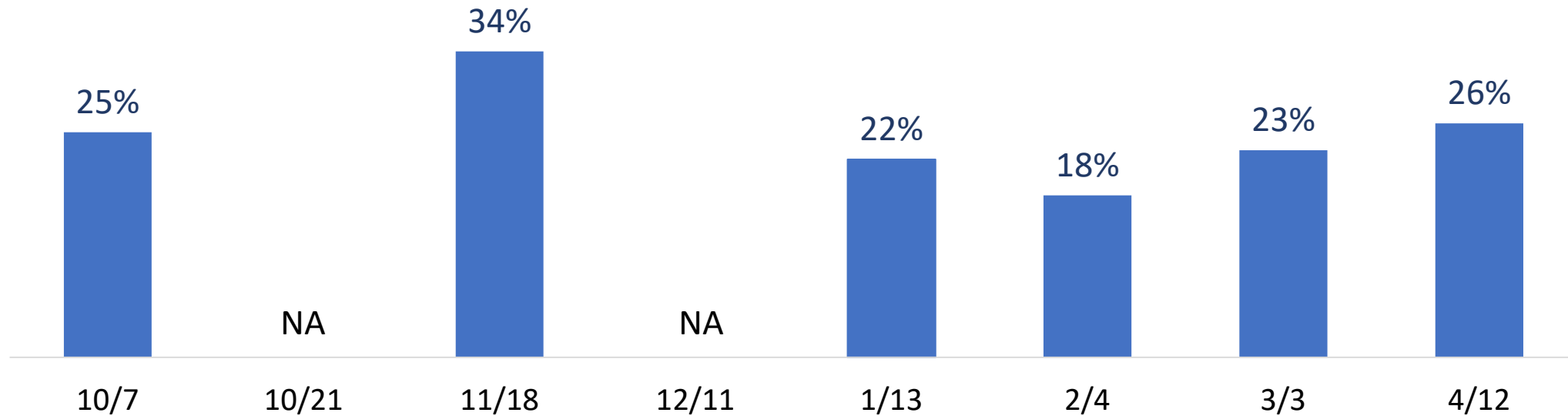
## TOP 3 BOX EAGER



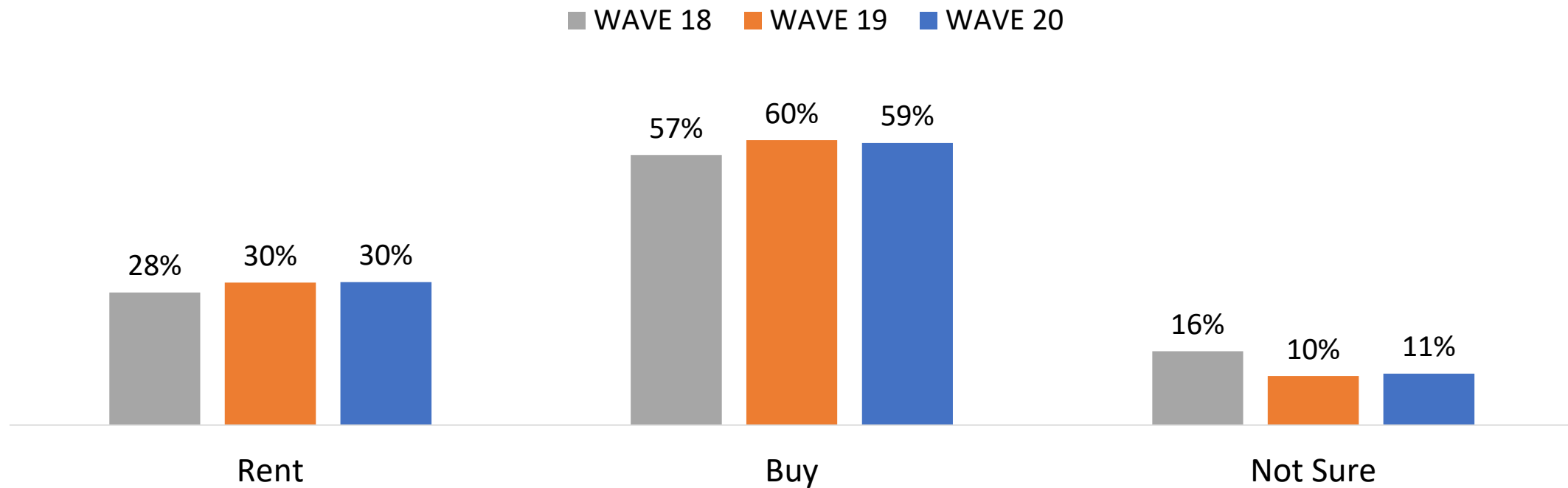


How likely are you to relocate, or move to a location more than 50 miles from your present residence over the next six months?

## TOP 3 BOX LIKELY



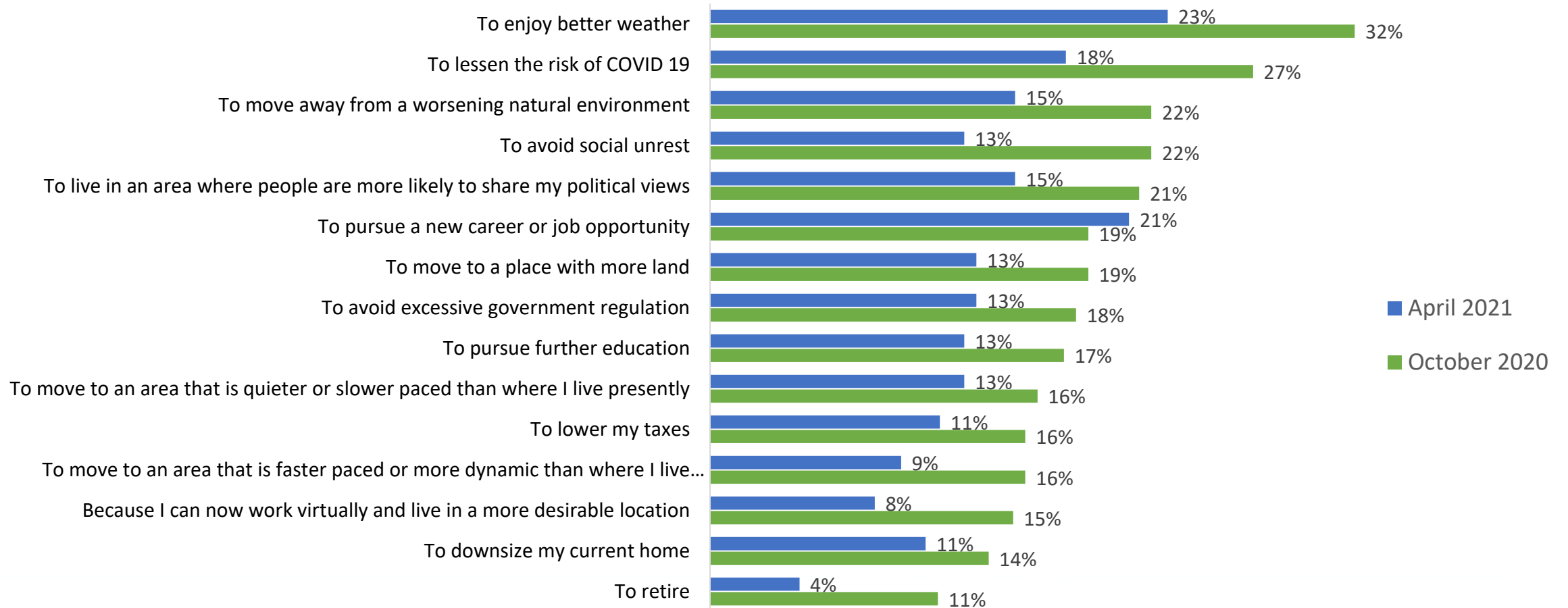
As you think about your upcoming relocation, would you plan to....



# Career Opportunities, Educational Pursuits and a Quieter Lifestyle Top Relocation Motivations

## BACK-TO-NORMAL BAROMETER 2021

Which, if any of the following are reasons why you are likely to relocate more than 50 miles from your present residence, over the next six months?



# BACK-TO-NORMAL BAROMETER

## QUESTIONS?

- What questions do you have for us?
- What would you like to ask in Wave 21?

2021

Ron Bonjean, Partner, ROKK Solutions  
Jon Last, President of Sports & Leisure Research Group  
David Klein, SENIOR Partner, Sports & Leisure Research Group