

**SPORTS &
LEISURE**
RESEARCH GROUP

Engagious

ROKK
SOLUTIONS

BACK-TO-NORMAL BAROMETER

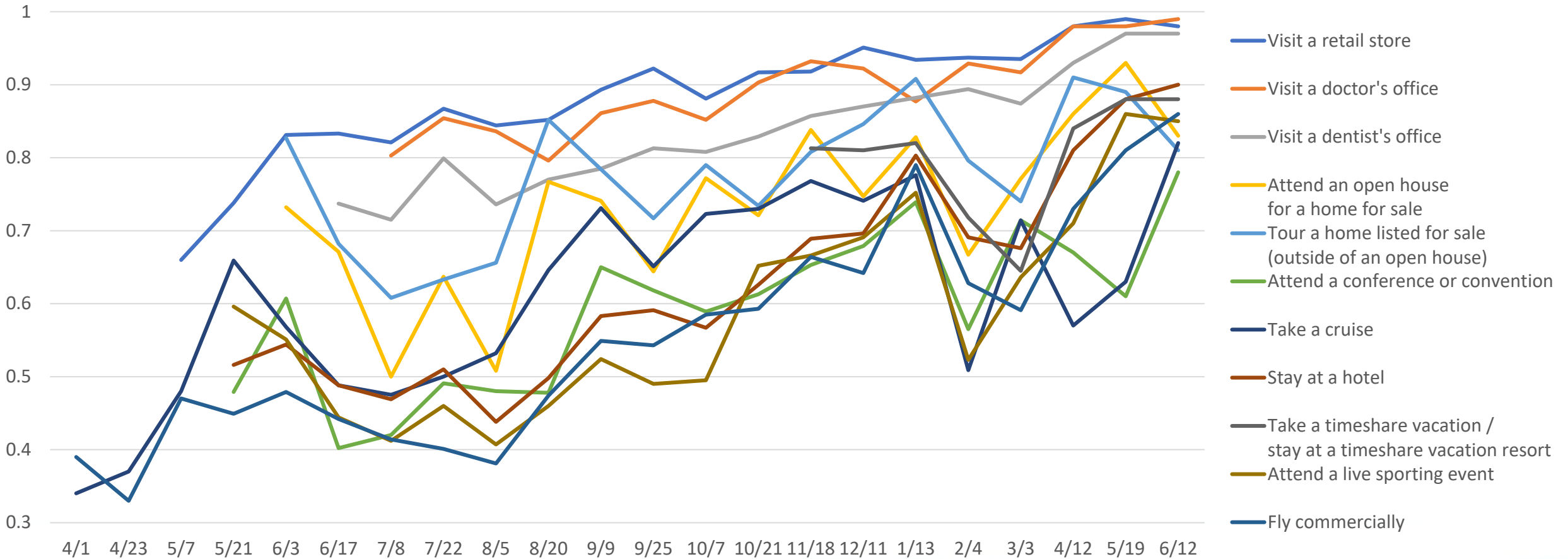
A “MUTED” REOPENING

Insights from the June 12, 2021 “Back-to-Normal Barometer”

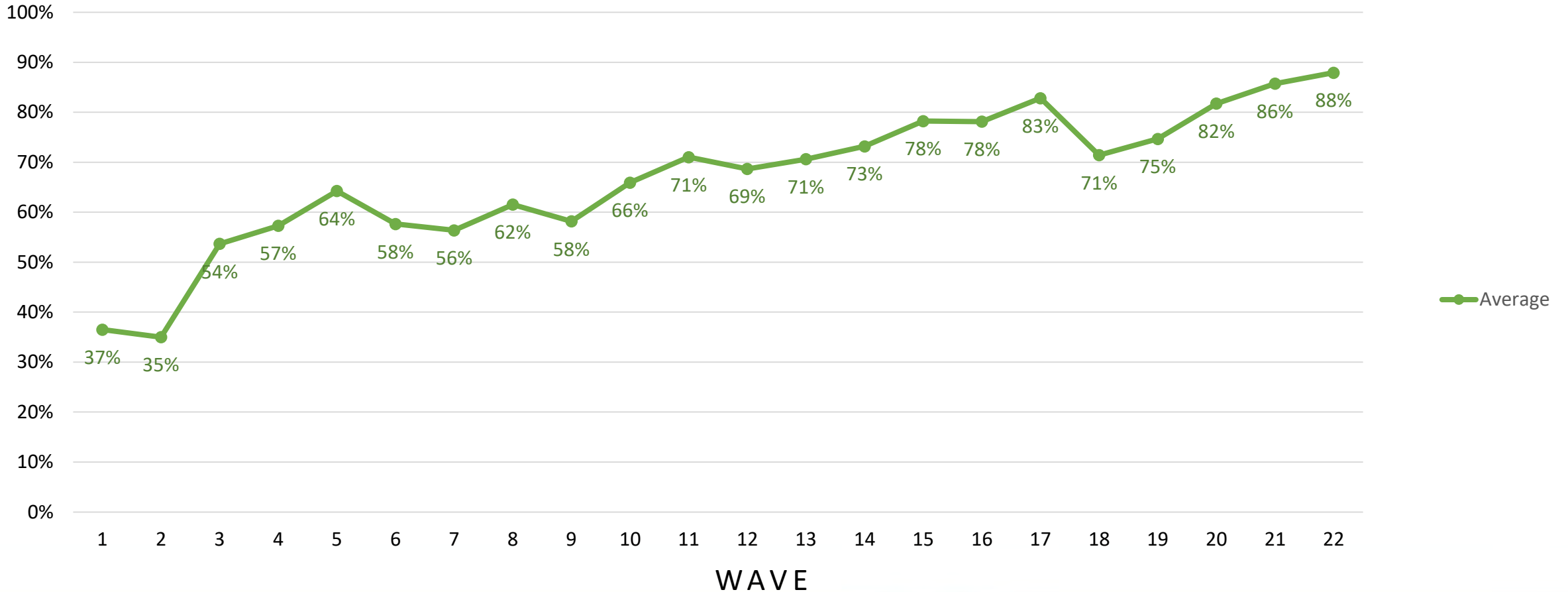
2021

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

[Among those who have done this activity pre-pandemic:] 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



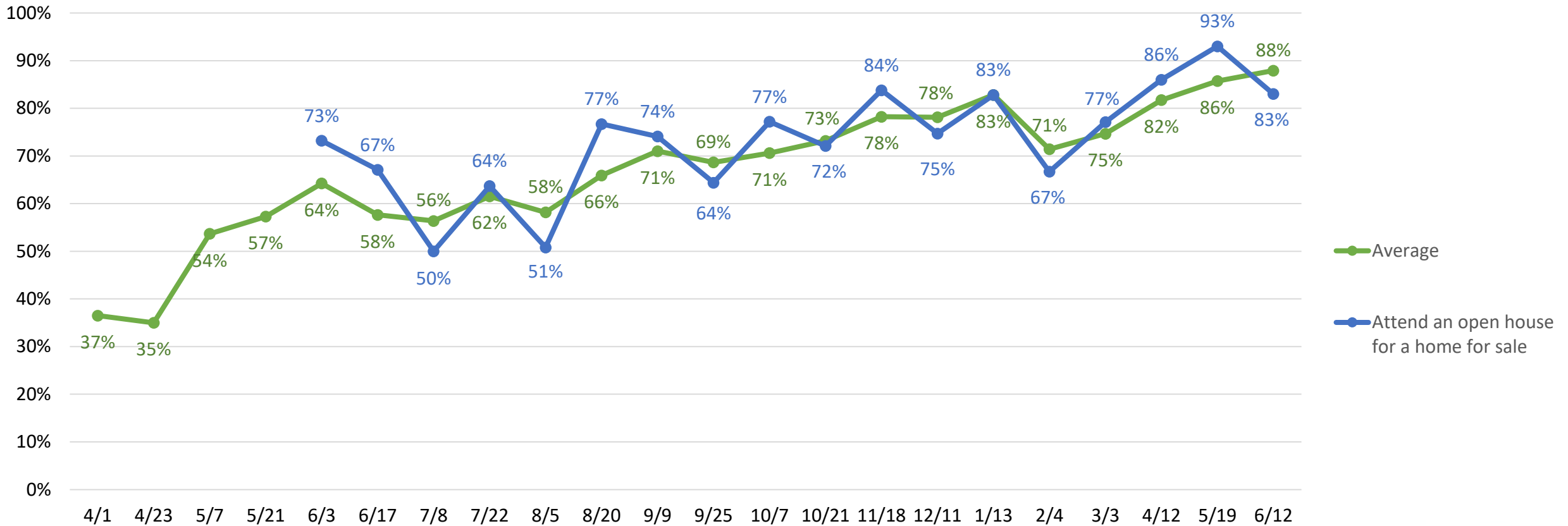
[Among those who have done this activity in the past 12 months:] For each of the following activities, please indicate which of the following conditions is closest to your current point of view: Recently active + Ready to go



Open House Versus Activity Average

BACK-TO-NORMAL BAROMETER 2021

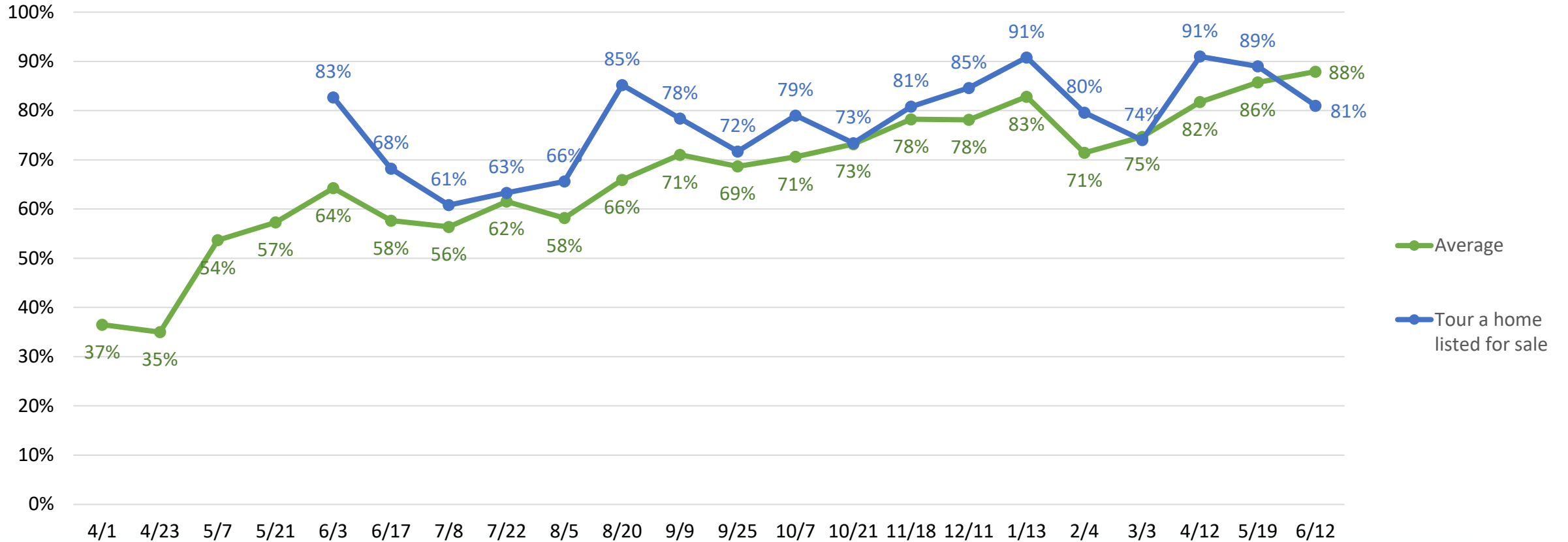
[Among those who have done this activity in the past 12 months:] For each of the following activities, please indicate which of the following conditions is closest to your current point of view: Recently active + Ready to go



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

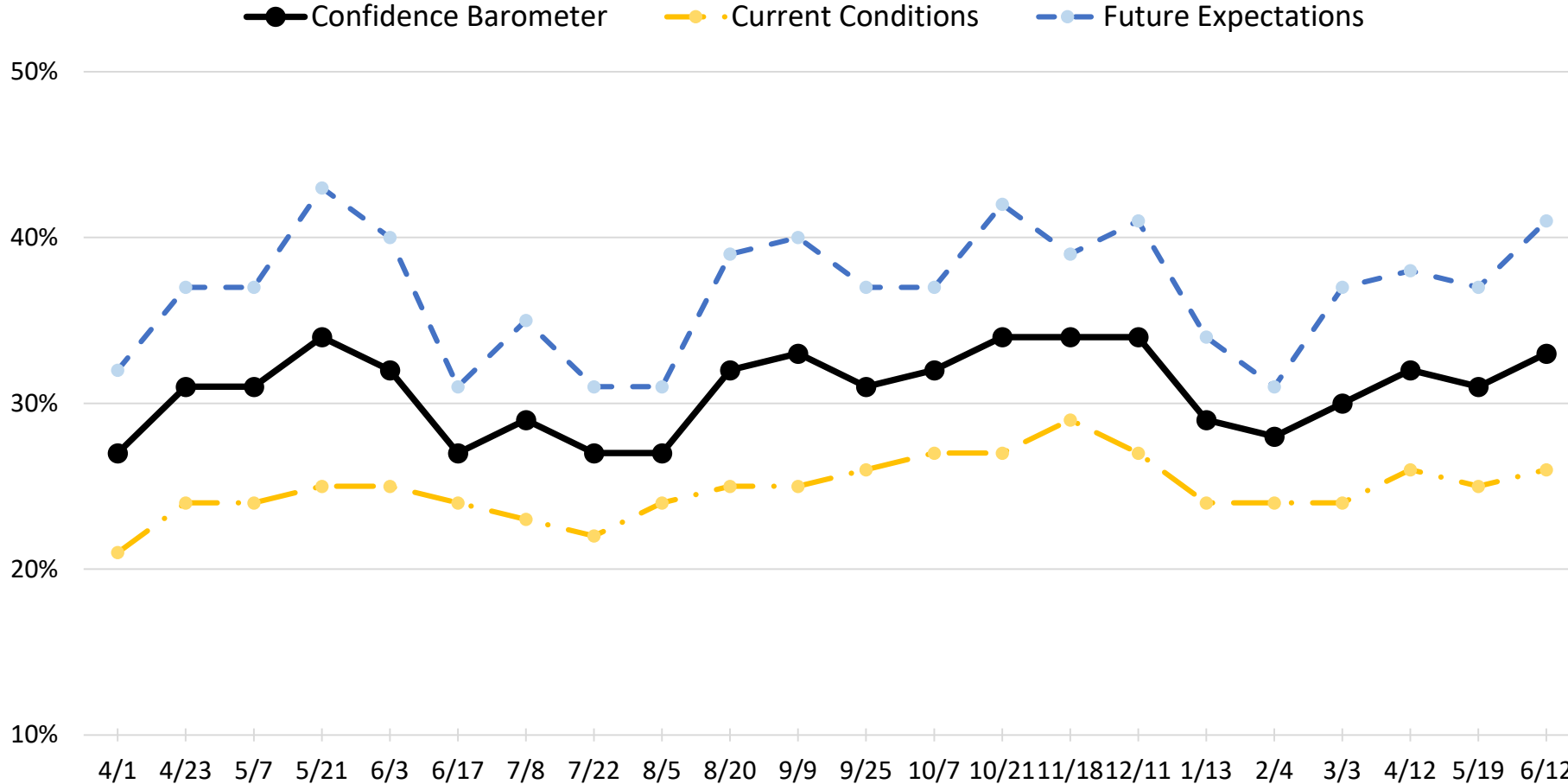
BACK-TO-NORMAL BAROMETER 2021

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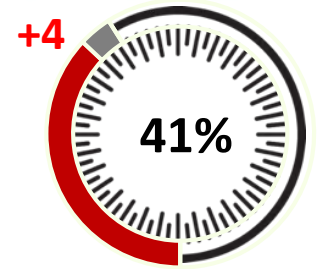


Confidence Saw a 2-point Increase Fueled by Increased Optimism about the Future

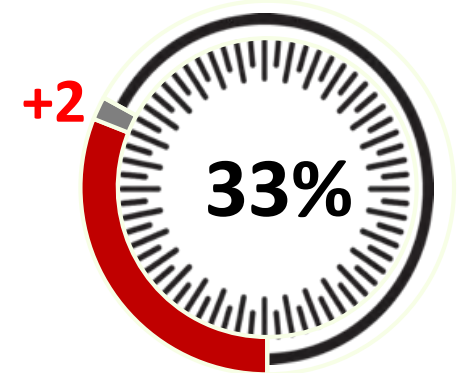
BACK-TO-NORMAL BAROMETER 2021



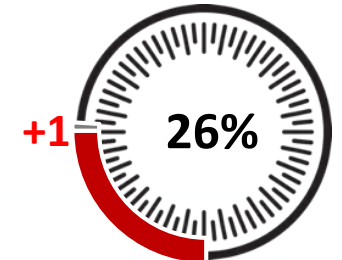
Future Expectations



Confidence Barometer

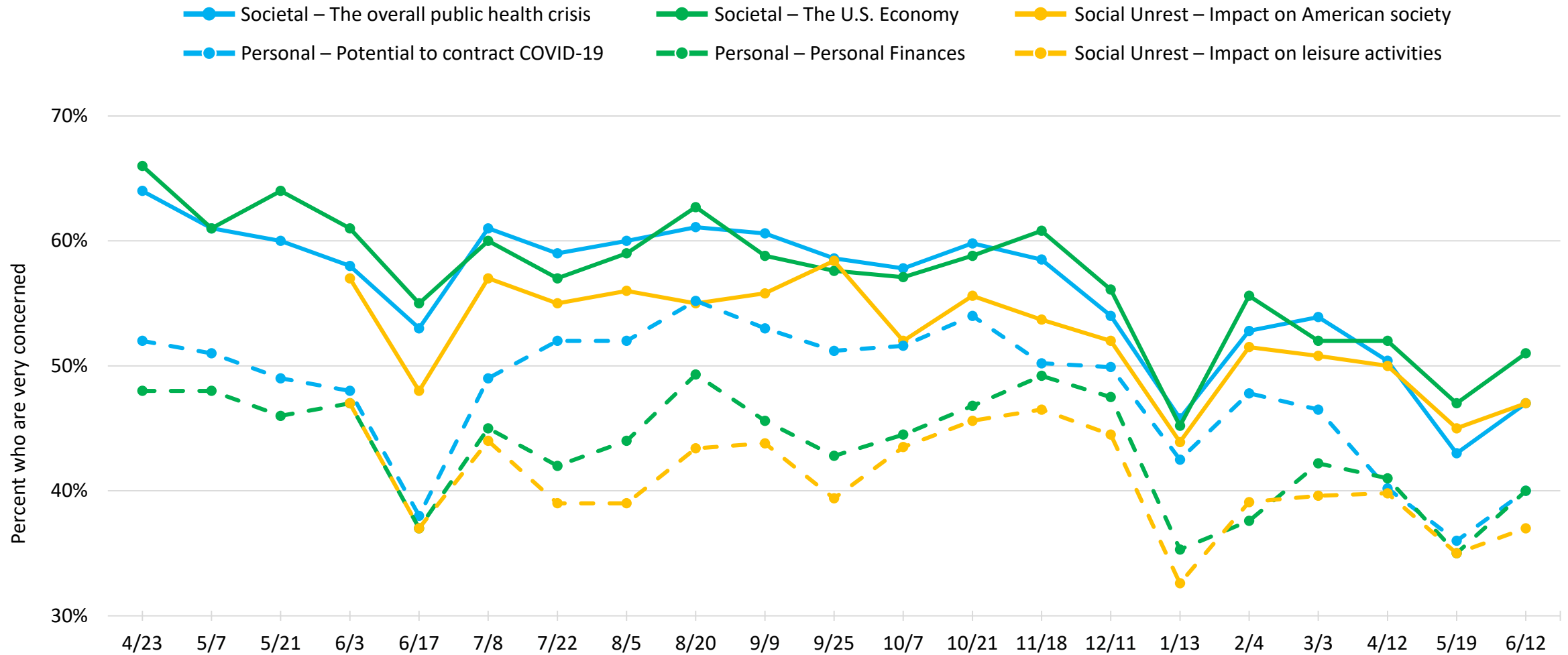


Current Conditions



Concerns Ratcheted Up in June

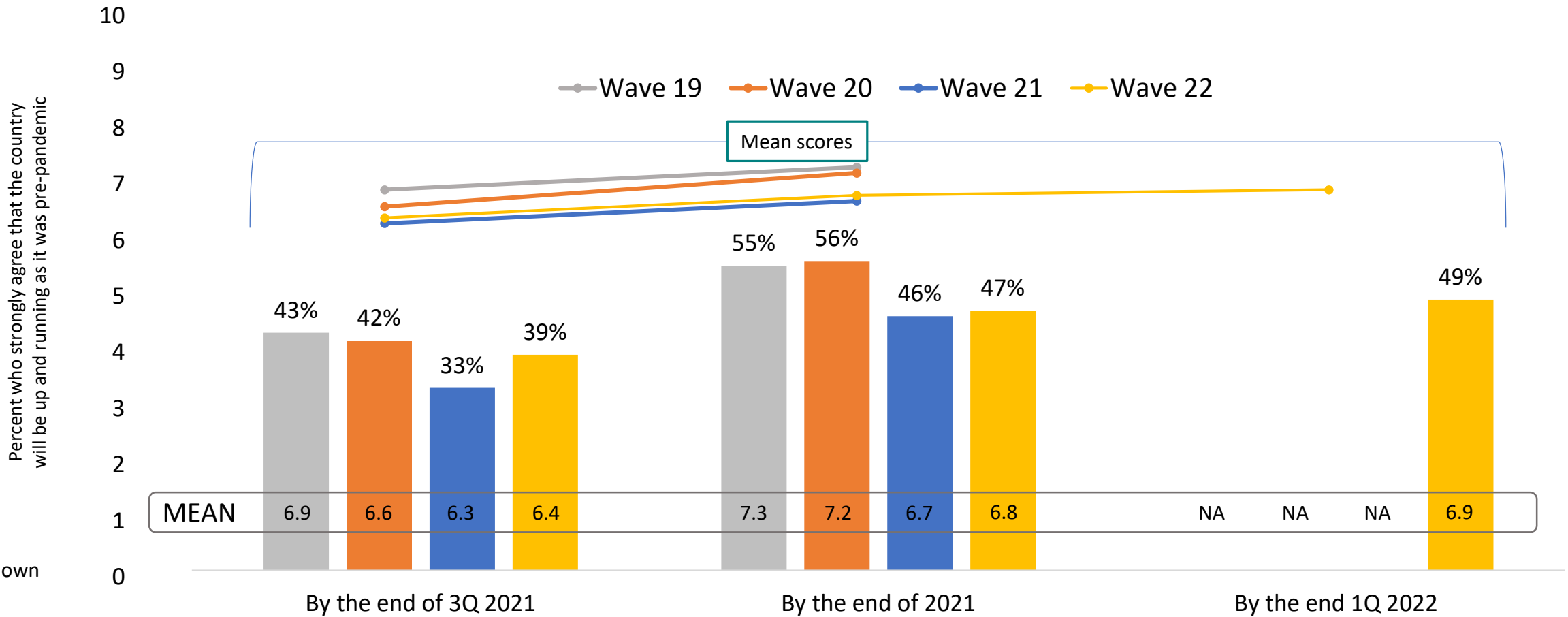
BACK-TO-NORMAL BAROMETER 2021



Only About Half Sees the Country Up and Running At Pre-Pandemic Levels by the End of the Year Or Q1 2022

BACK-TO-NORMAL BAROMETER 2021

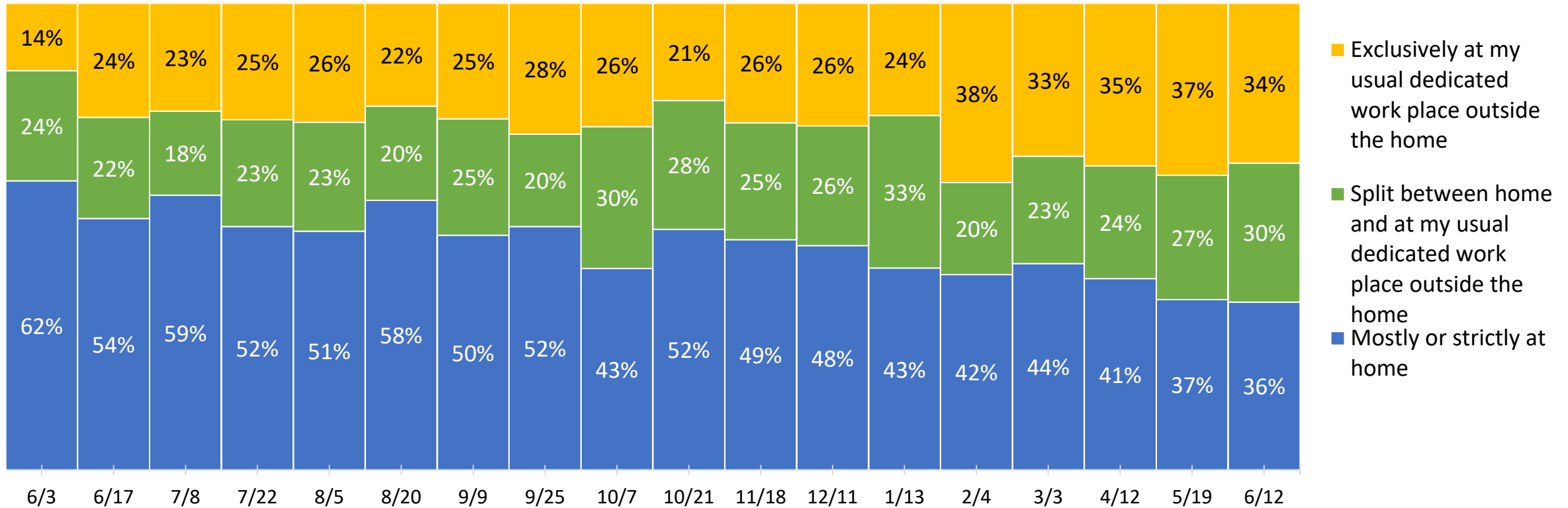
Pre-pandemic



The Hybrid Work Model has Remained a Workplace Reality Despite Reduced Threats from COVID-19

BACK-TO-NORMAL BAROMETER 2021

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

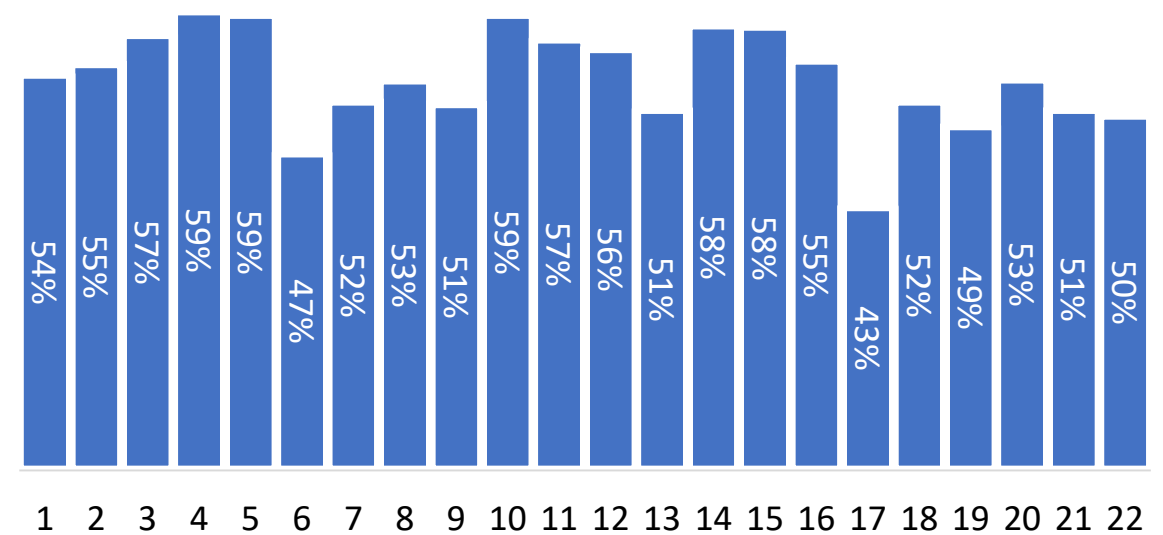
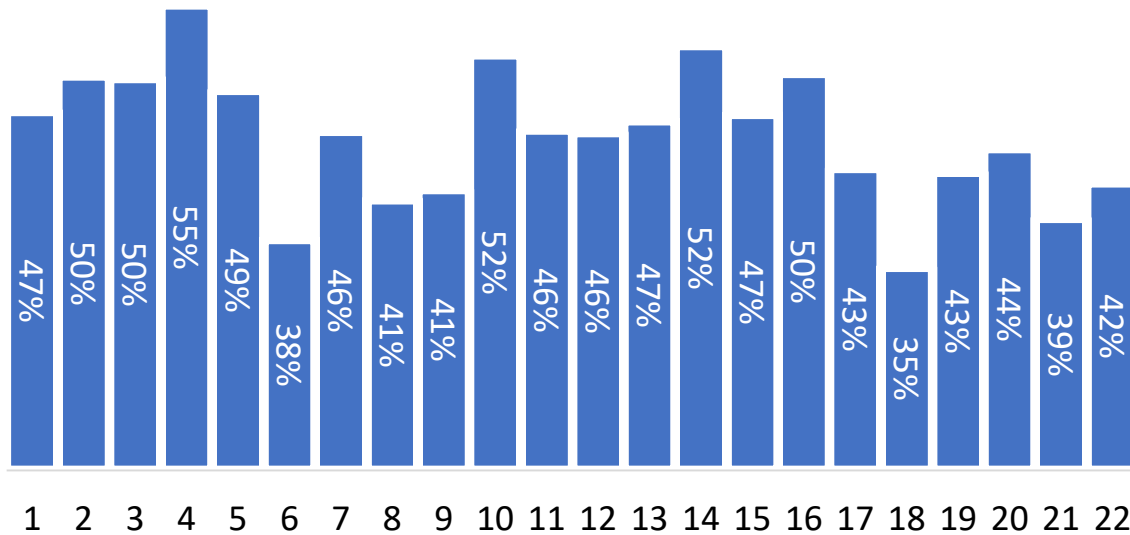


➤ A Barometer low 37% are working mostly or strictly from home...but 14% don't expect to ever come back

I'm optimistic about the future of our country

It's important for my life to include a number of unique experiences

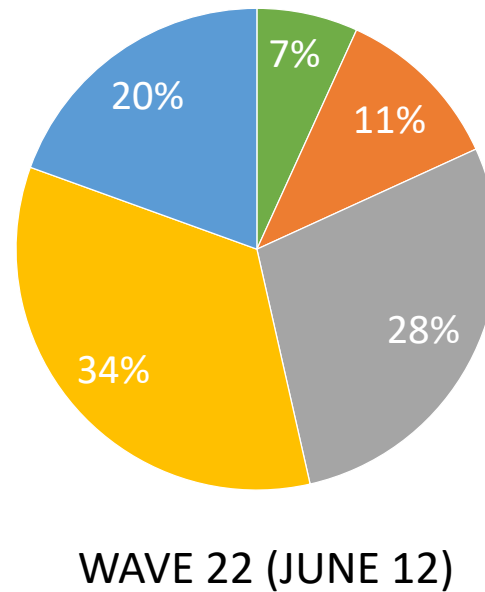
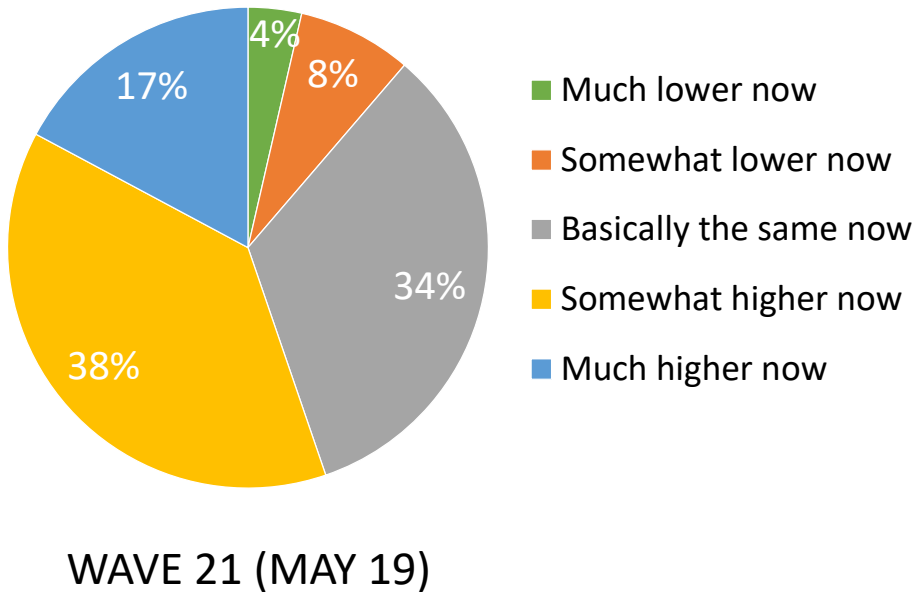
TOP 3 BOX AGREE



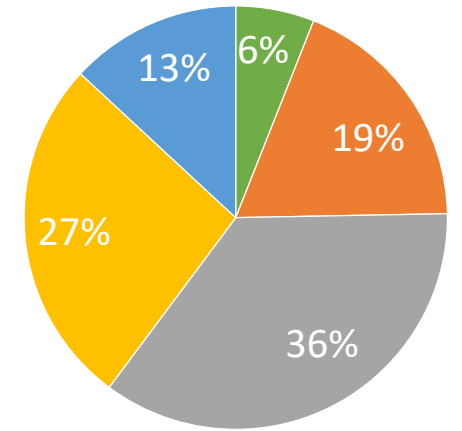
47% agree that "people around me seem generally happy"

Inflationary Concerns Persist...But Less Prevalent in Travel BACK-TO-NORMAL BAROMETER 2021

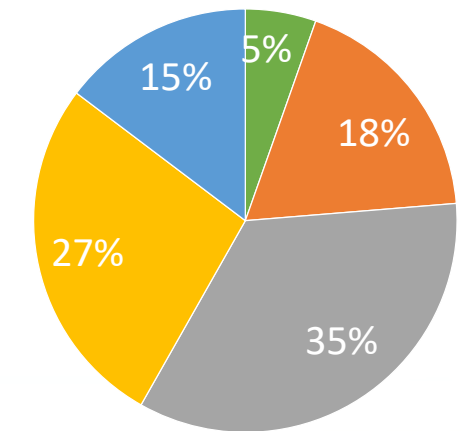
Compared to the six months prior to the pandemic, would you say that prices for the consumer items you regularly buy are...



HOTELS



AIRFARE



Consumer Perceptions About the Economy are a Mixed Bag

BACK-TO-NORMAL BAROMETER 2021

GOOD NEWS

If I see something I like, I don't worry about price
AGREEMENT

WAVE 22 (JUN '21) 55%

WAVE 1 (APR '20) 43%

The country is currently in recession
TOP 3 BOX

WAVE 22 (JUN '21) 33%

WAVE 10 (SEP '20) 60%

Today I have to make more difficult decisions about discretionary purchases than I did five years ago
TOP 3 BOX

WAVE 22 (JUN '21) 40%

WAVE 10 (SEP '20) 55%

BAD NEWS

I'm more budget conscious today than I was two years ago
AGREEMENT

WAVE 22 (JUN '21) 70%

Before the end of (2021), the economy will begin to add jobs again
AGREEMENT

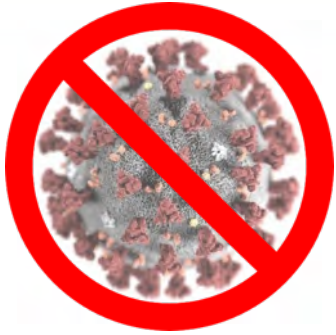
WAVE 22 (JUN '21) 33%

WAVE 1 (APR '20) 77%

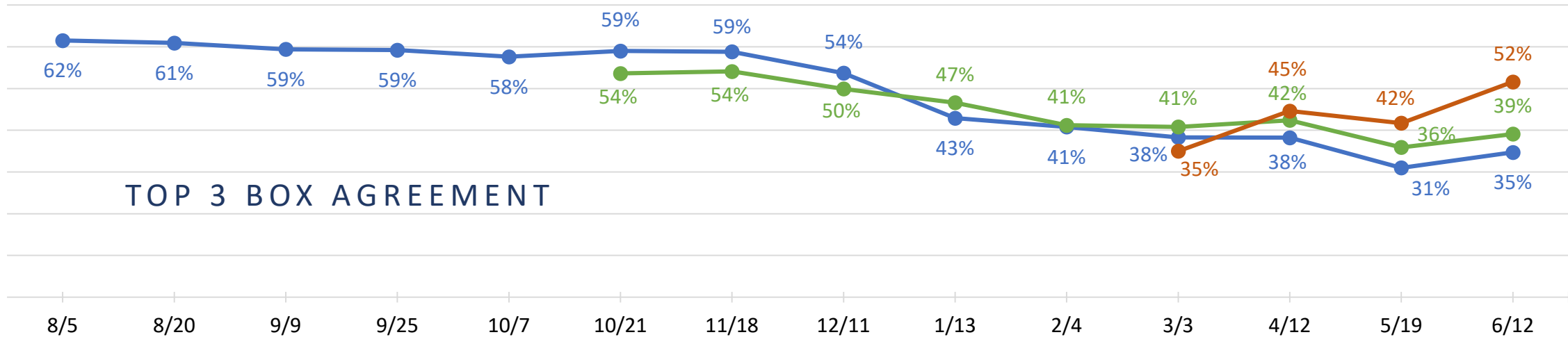
People will go back to spending freely on luxuries again in [2021]
TOP 3 BOX

WAVE 22 (JUN '21) 36%

WAVE 4 (JUL '20) 47%

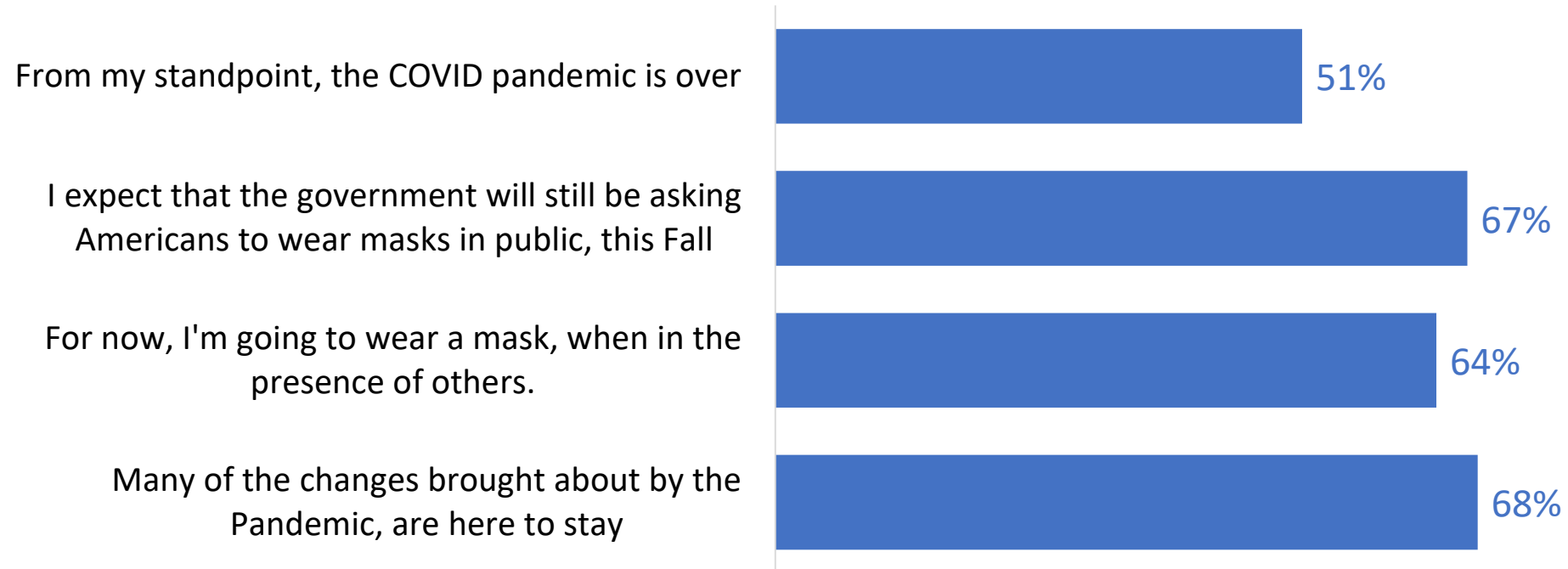


- I'm concerned that there will be a fourth wave of the COVID-19 outbreak which will require additional event cancellations and lockdowns within the next six months
- I believe that areas of the country with high rates of COVID-19 cases should be re-closed
- It's time to open up sporting events to all fans who wish to attend



- 70% now agree that “Once COVID 19 vaccines are available for all who want one, it will no longer be appropriate for the government to dictate the size of gatherings outside the home.”
- More than 2/3 agree that the prospect of catching COVID 19 is not as scary as it was at the start of the pandemic...up 10 points from December’20
- Those who strongly agree that it is our civic obligation to re-open all schools this Fall has risen from 29% last September to over 50% this June

AGREEMENT





“Yes we are getting vaccinated...but countries like Taiwan always had low #s and they are now going up again...”

- Masks and sanitizer as foundational change
 - Back for flu season
- All has become so politicized and that doesn't help the situation

“For so long it felt like those not wearing were making a statement, and I so didn't want to be on that team.”

“You will see people willing and wanting to wear a mask for years. We are in a great place of reopening...but also not far off from some stupid decision that would put us right back. I want to be prepared for another shutdown. As a consumer there are certain necessities. Just the idea that resources could be gone at a moment's notice. It's just insanity.”

“Herd immunity could occur state by state but not for the country as a whole. California is so different ...It's so Liberal out here... Other states don't see the world as how I see it. Personally I don't think it is over.”

“I'm guessing we change and become more like China with pollution and with the fear of new variants every couple of weeks. They will be a part of us going forward. People will have to keep trying every year with boosters.”

(CONTINUED)



(CONTINUED)

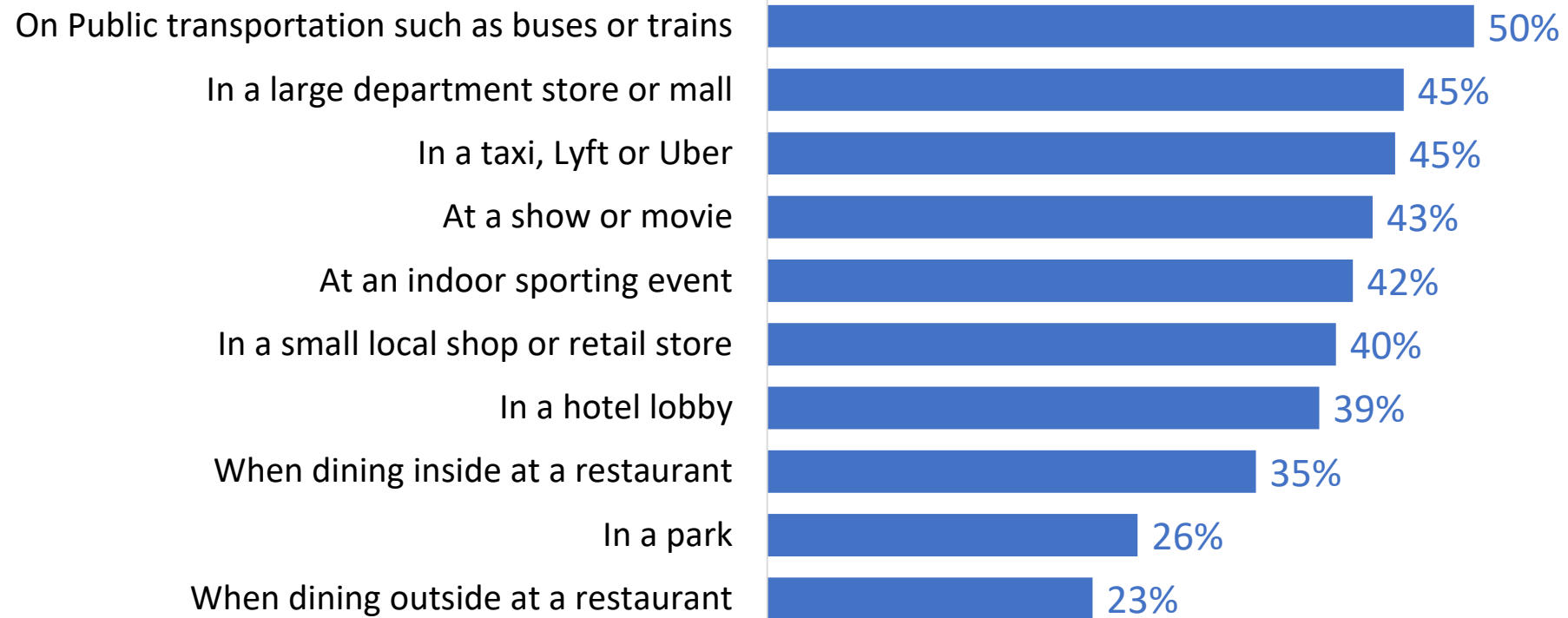
“I look to see if they still have a sign.... I’ll wear one every year during flu season or when I’m flying. Seeing how flu was non existant this year...it’s hard to argue with that.”

- Masks and sanitizer as foundational change
 - Back for flu season
- All has become so politicized and that doesn’t help the situation

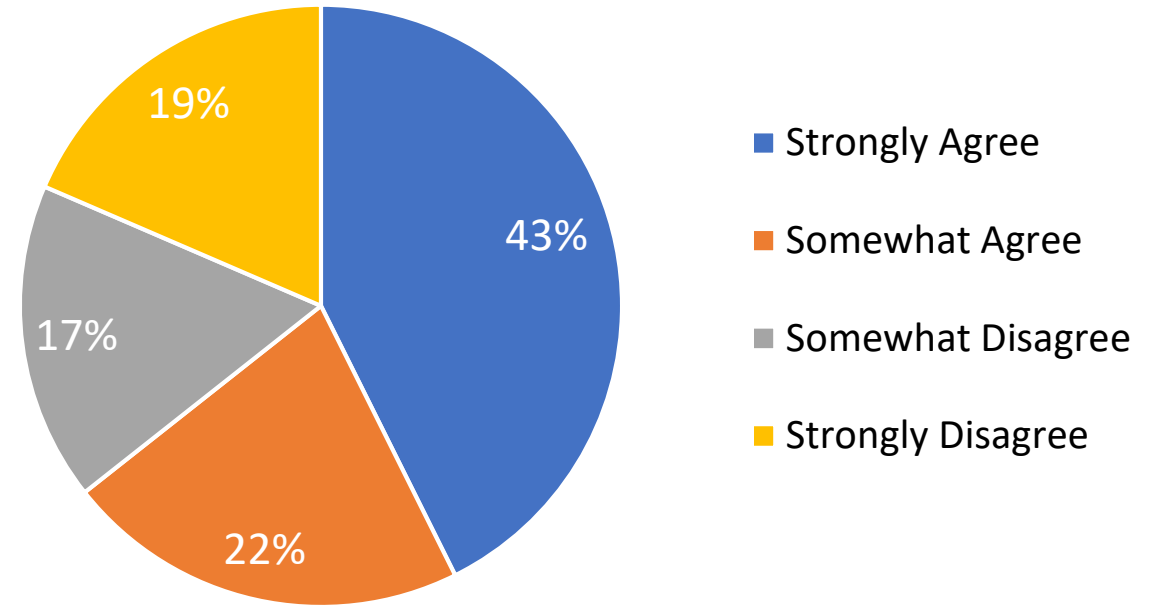
“I think we are still pretty nervous...The India variant is all over the news. We’re going to be nervous for quite some time. This Summer we’re all going to enjoy and then it will flare up again in Fall around Flu season. When sun is shining everyone is just excited and less concerned about health ramifications. But in Fall there will be a natural flare up when we go back inside and these vaccines are no guarantees.”

“The first thing that pops up [when I see someone without a mask] is I hope they are vaccinated....I think freedom. I think they are bold. You can still catch COVID if vaccinated. It defeats the whole point of being vaccinated to not protect your family. I still wear it.”

For which, if any, of the following situations are you or would you wear a mask or facial covering?

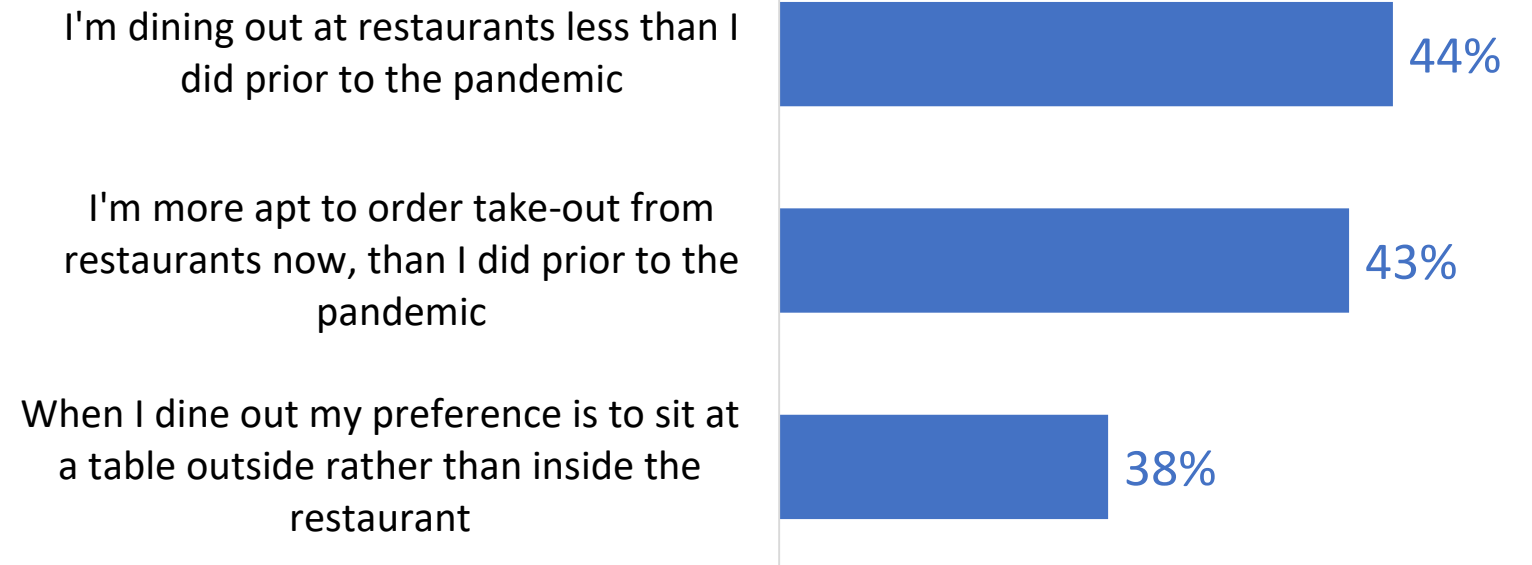


When meeting people out in public, it's awkward determining whether or not to shake hands...



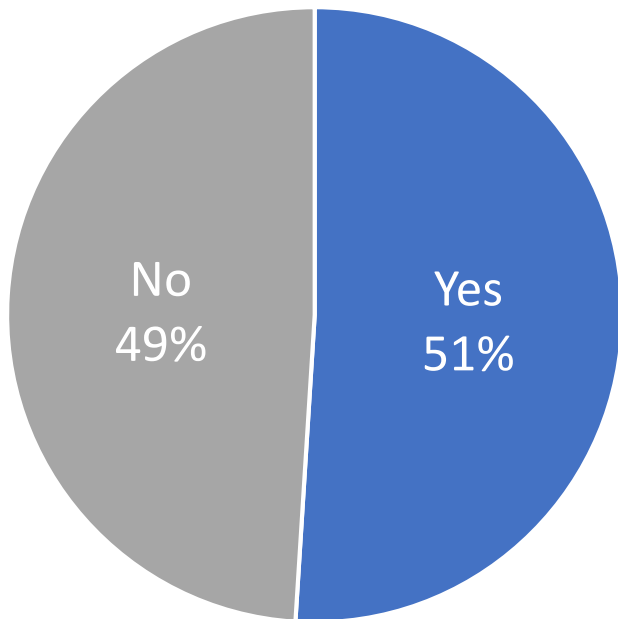
Please indicate how much you agree or disagree with each of the following statements

TOP 3 BOX AGREEMENT SUMMARY

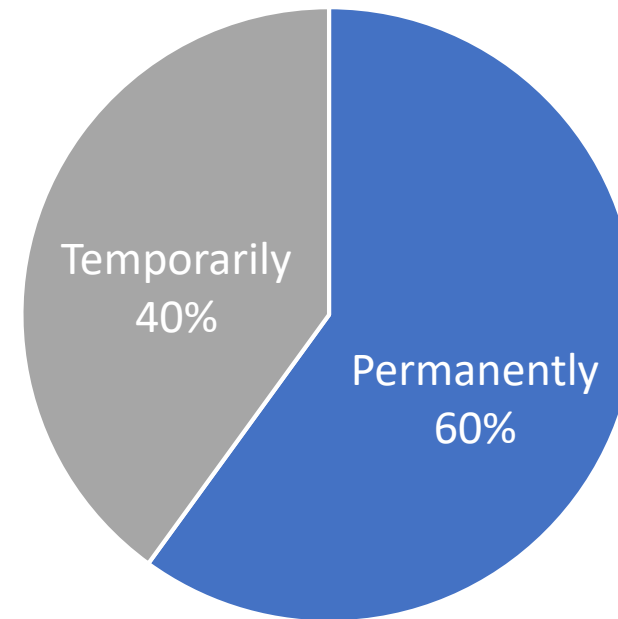


A COVID liberation moment: This is a particular moment in time where for someone personally, they felt that they had basically gotten their pre-pandemic life back in some meaningful way...either temporarily or permanently.

Have you personally experienced a COVID liberation moment?



And for you was that COVID liberation moment reflective that your pre-pandemic life had returned permanently or temporarily?



Which of the following best describes your first COVID Liberation Moment?



WHAT SET THEM FREE?

- Seeing Family
 - Hugs
- Getting vaccinated
- Removing Masks
- The Return of Youth Sports
- Eating Indoors

“Ultimately...myself getting the vaccine [was the moment]. I felt eager to get back to normal.”

“My mom has some health problems and just recently I was able to hug her and give that emotional contact. She didn't understand why you can't hug or touch...So that was a big one.”

“At my grandfather's funeral, everyone was coming in the house hugging and visiting without masks and you realized everyone was vaccinated and it felt very normal. One word to describe it...Relief!”

BUT NOT YET FOR EVERYONE

- Fear of variants
- Anticipated need for boosters
- Waiting to hear “all clear” from authorities

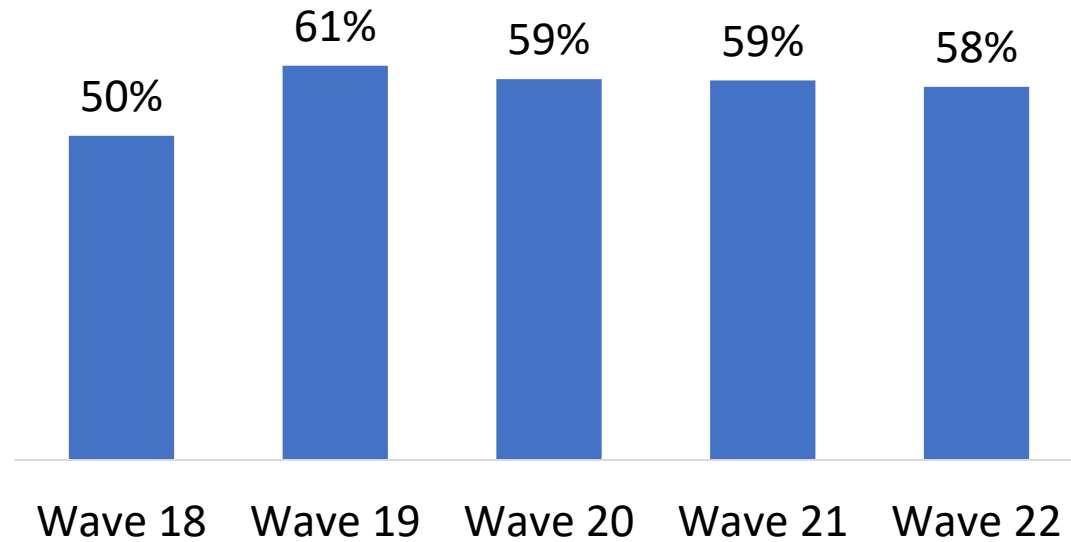
“For me when CDC says unvaccinated people don't have to wear masks we're done...But I don't think that's going to happen.”

“Not yet...When mask mandates are completely lifted and it feels safe to be within six feet of one another. They aren't exclusive to each other. Even without the mask mandate I might hesitate to take one off. It's a trust issue...You don't know who is sick and who is vaccinated.”

“With people on both sides, waiters will have to keep wearing masks. You never know who is vaccinated.”

“If the President says no more infections and we've gotten to herd immunity and we are safe. I'd have to trust what government says. CDC also...if Dr Fauci said so, I would trust it.”

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

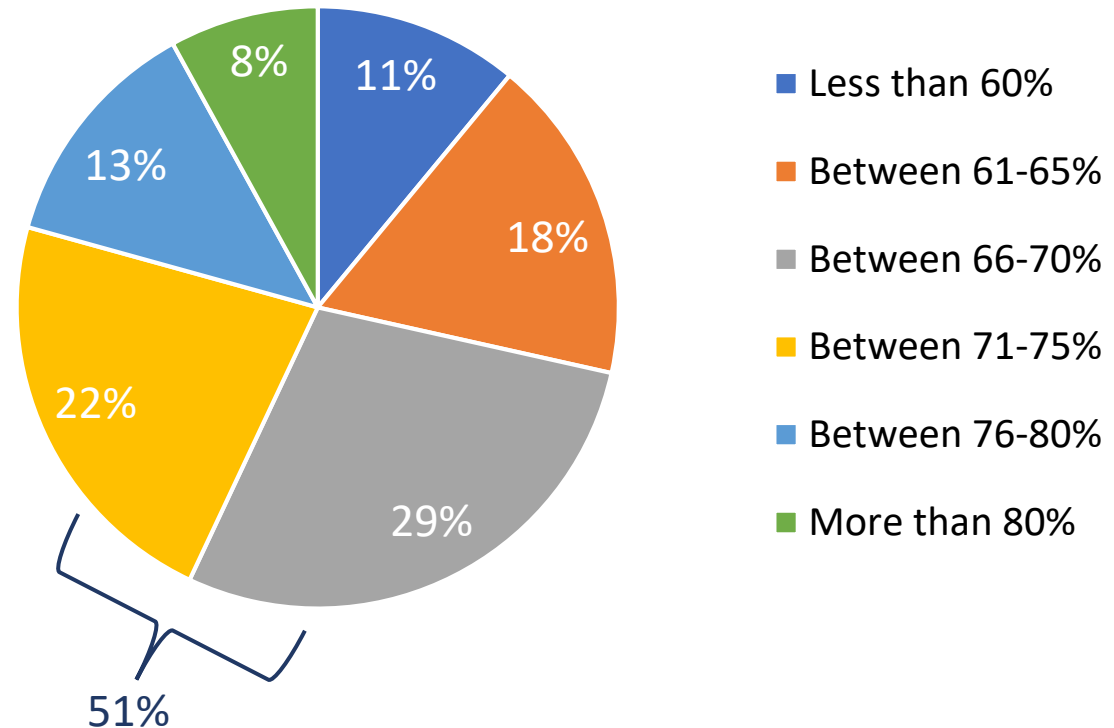


Top 3 Box Agreement

OUT INDEXING THE AVERAGE: Men vs. Women; age 35+; Democrats

A Majority See Between 60% and ¾ of the Nation Vaccinated by Fall

What percentage of Americans do you feel will be vaccinated for COVID 19, by September of this year?

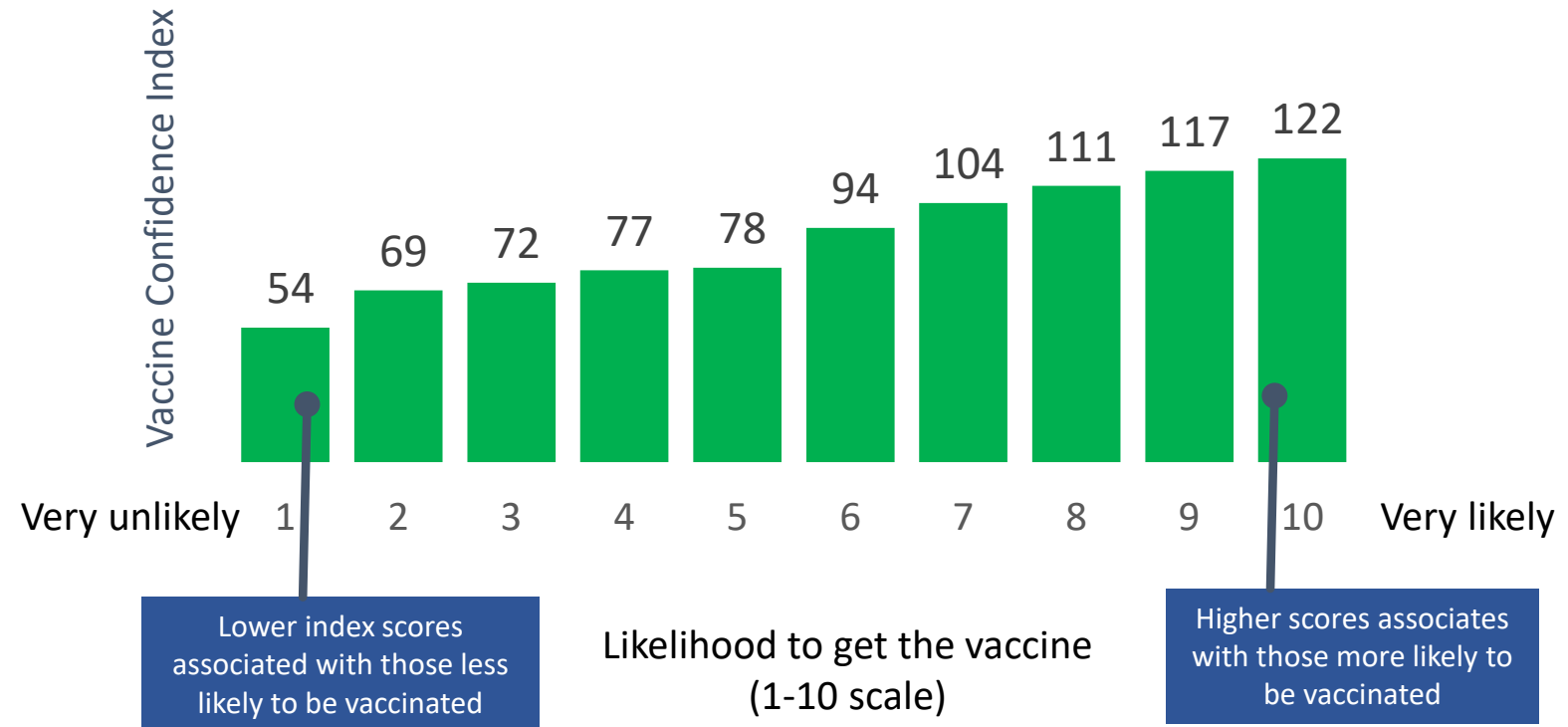


Elements of Vaccine Confidence

- + Vaccine efficacy: personal
- + Path to herd immunity
- + Activity mandate
- + Public health concerns
- + Severe reaction to COVID
- + Credible and clear

- Vaccine side effects
- Resistance to needles

VCI is highly correlated with likelihood to be vaccinated



Index components' changes in June:

+1 Vaccine efficacy: personal

- 6 Path to herd immunity

+3 Activity mandate

+4 Public health concerns

+3 Severe reaction to COVID

+5 Credible and clear

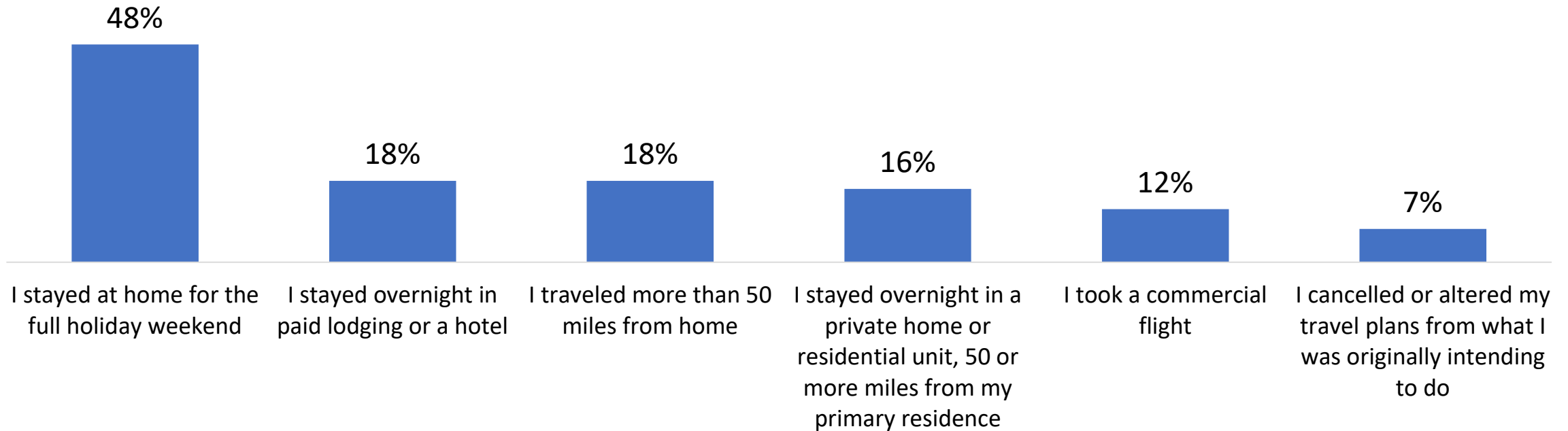
Vaccine side effects **- 3**

Resistance to needles **- 3**

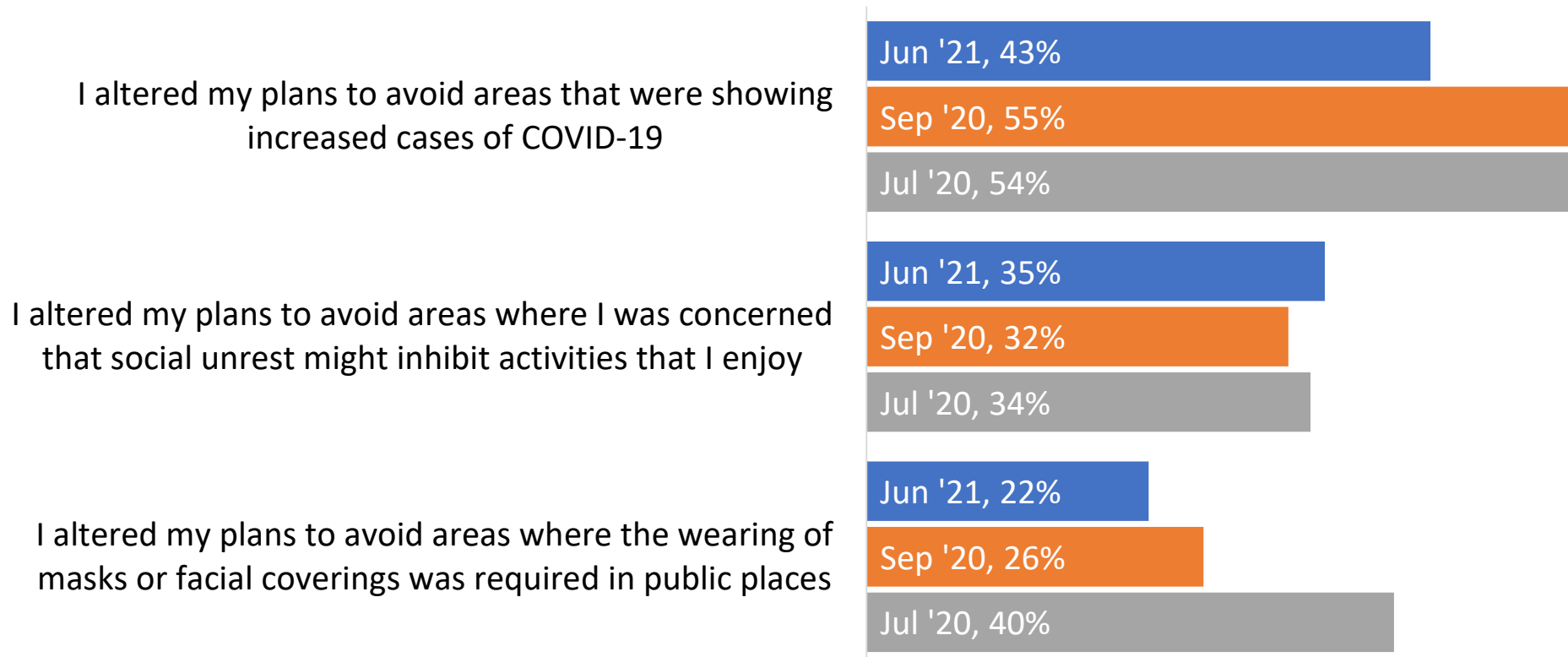
VCI: Vaccine confidence increased in June



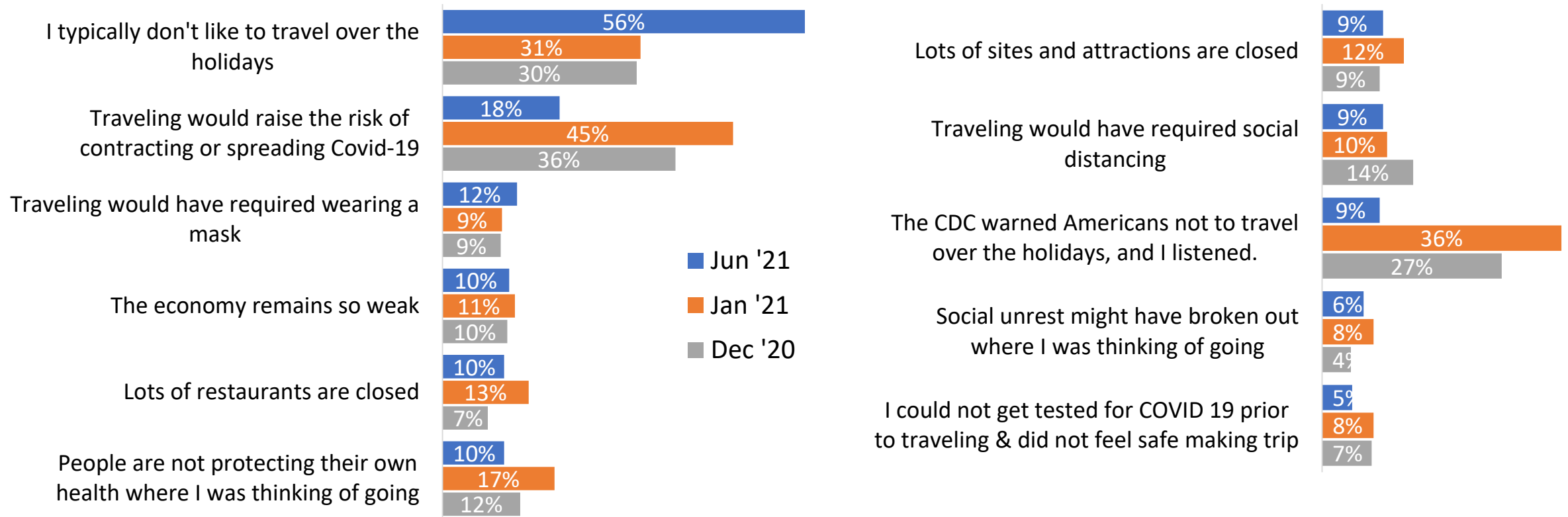
Which of the following, applies to the holiday just completed?



Which, if any of the following affected your holiday travel plans?



Which if any of the following were reasons why you stayed home for the holidays?

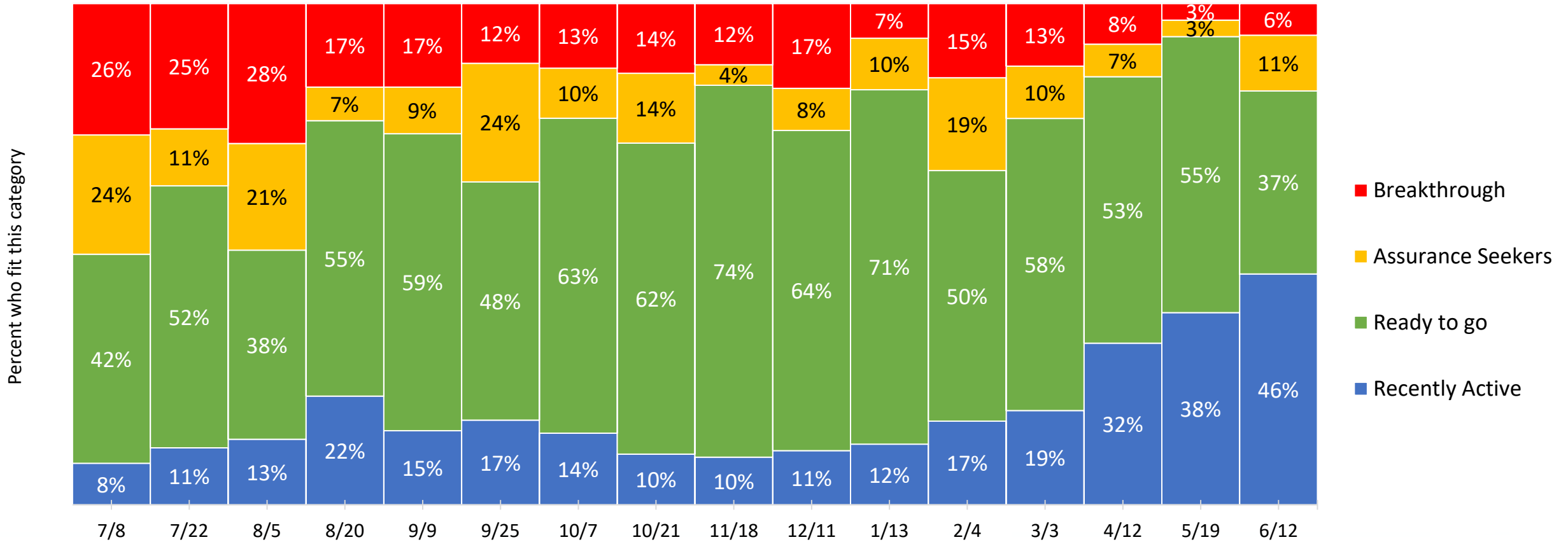


BACK-TO-NORMAL BAROMETER 2021

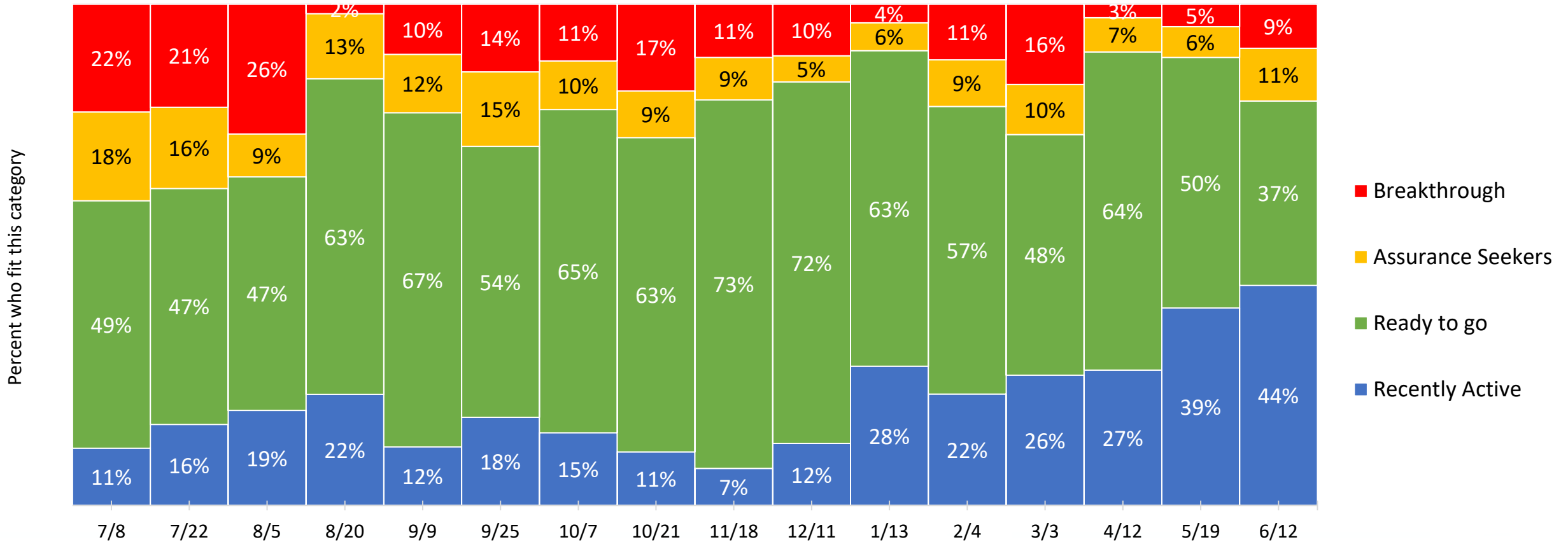


National Association of Realtors

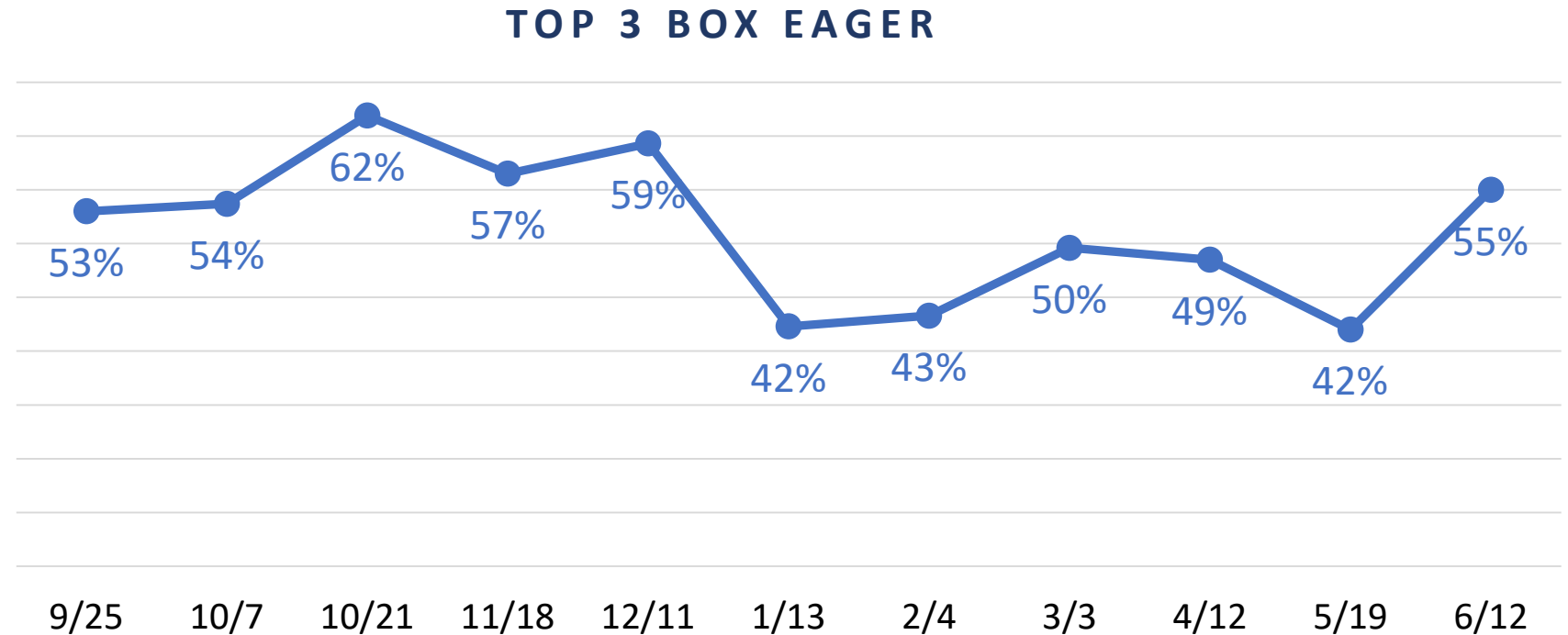
Which of the following conditions is closest to your current point of view... Attend an open house for a home listed for sale



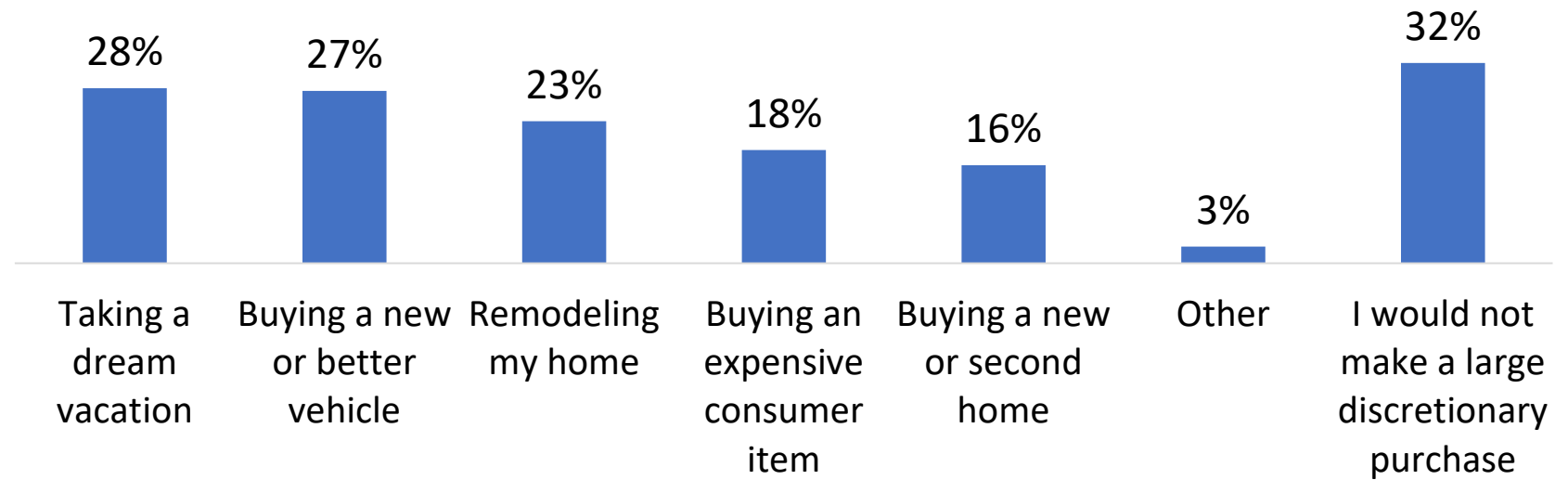
Which of the following conditions is closest to your current point of view... Tour a home listed for sale (outside of an open house)



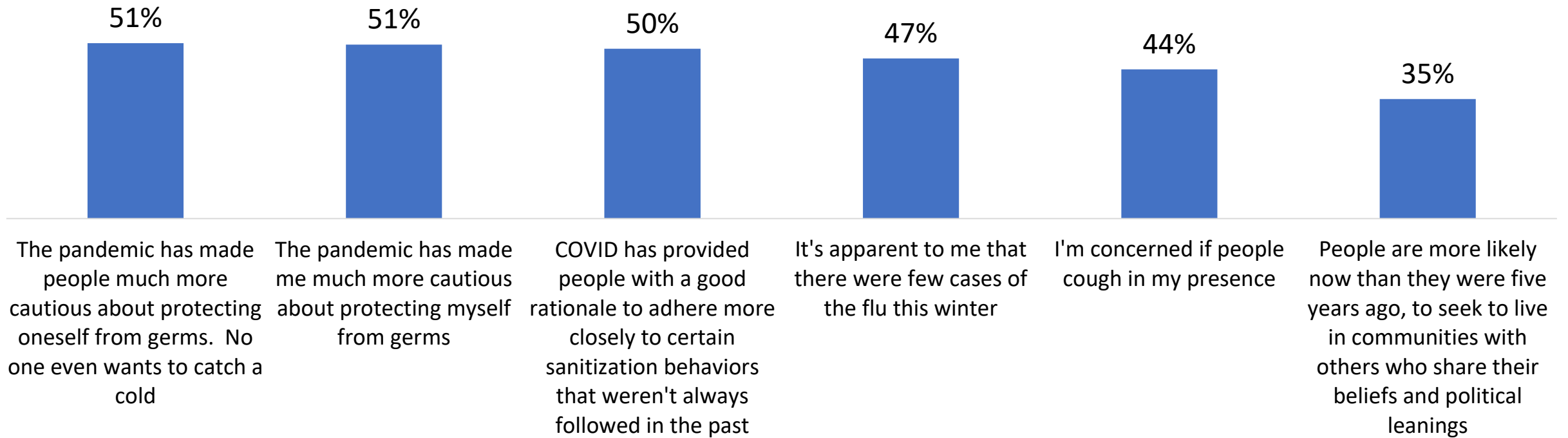
[Among those who work mostly or strictly at home:] How eager are you to return full time to your workplace outside of your home, relative to three months ago?



Which, if any, of the following large discretionary purchases are you planning to make over the next six months?



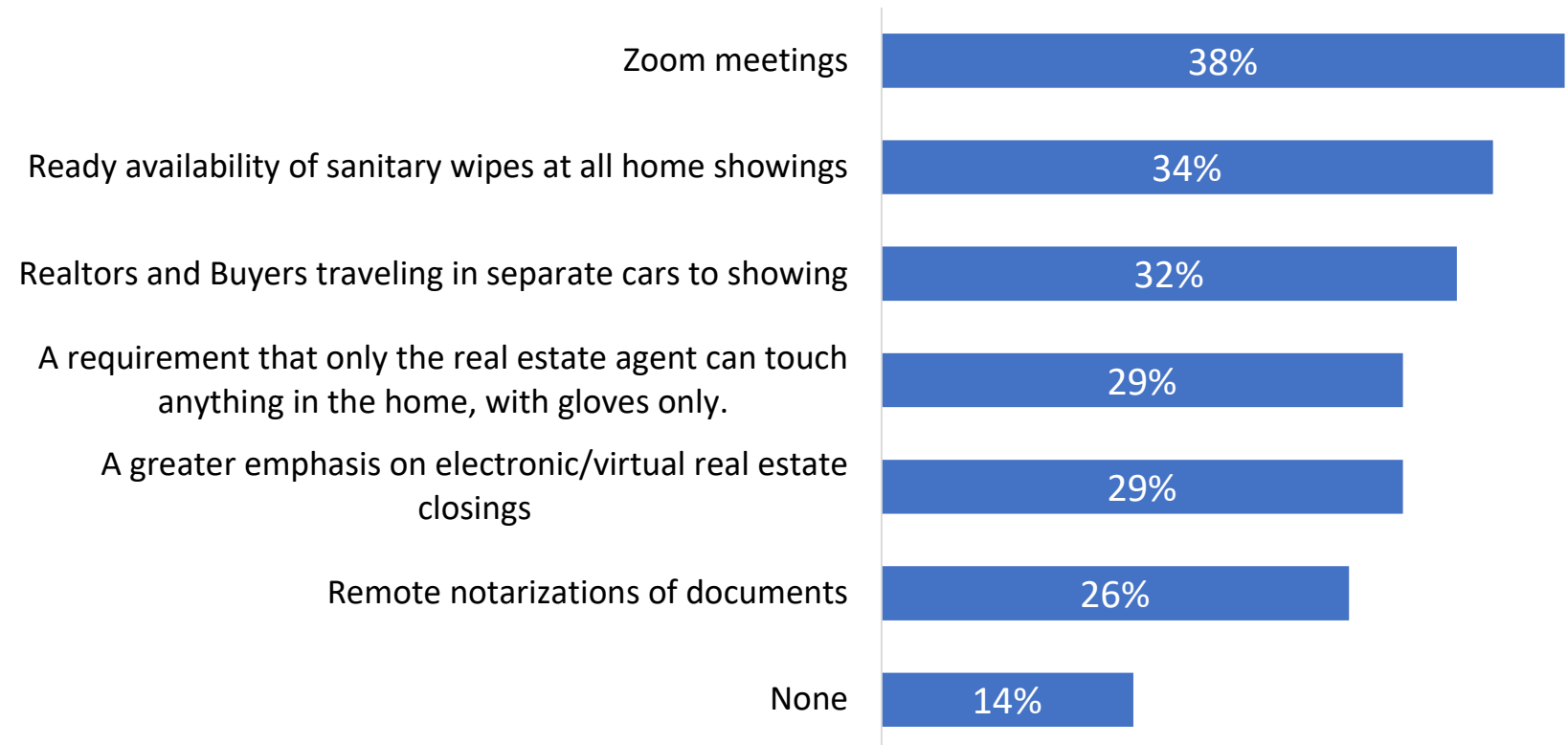
TOP 3 BOX AGREEMENT



Recent Home Shoppers Seek the Continuation of Various Pandemic Driven Behavioral Changes

BACK-TO-NORMAL BAROMETER 2021

In thinking further about the process of searching for and buying residential real estate, which, if any, of the following would you like to see continue after the pandemic?



BACK-TO-NORMAL BAROMETER

QUESTIONS?

- What questions do you have for us?
- THANK YOU FOR ALL OF YOUR SUPPORT!

2021

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