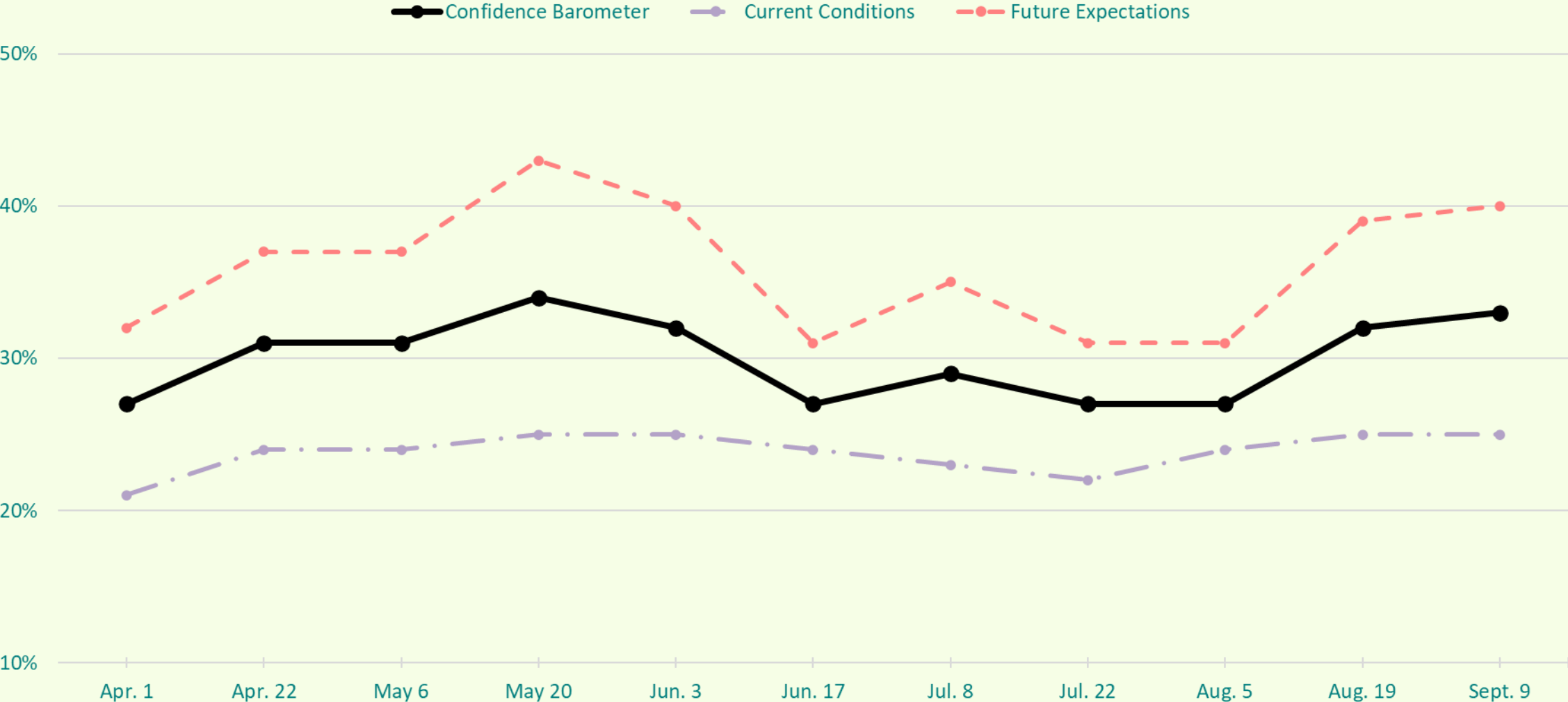


# **WAVE 11: EMERGING FROM THEIR SHELLS**

**Public opinion insights from the Sept. 9, 2020  
“Back-to-Normal Barometer”**

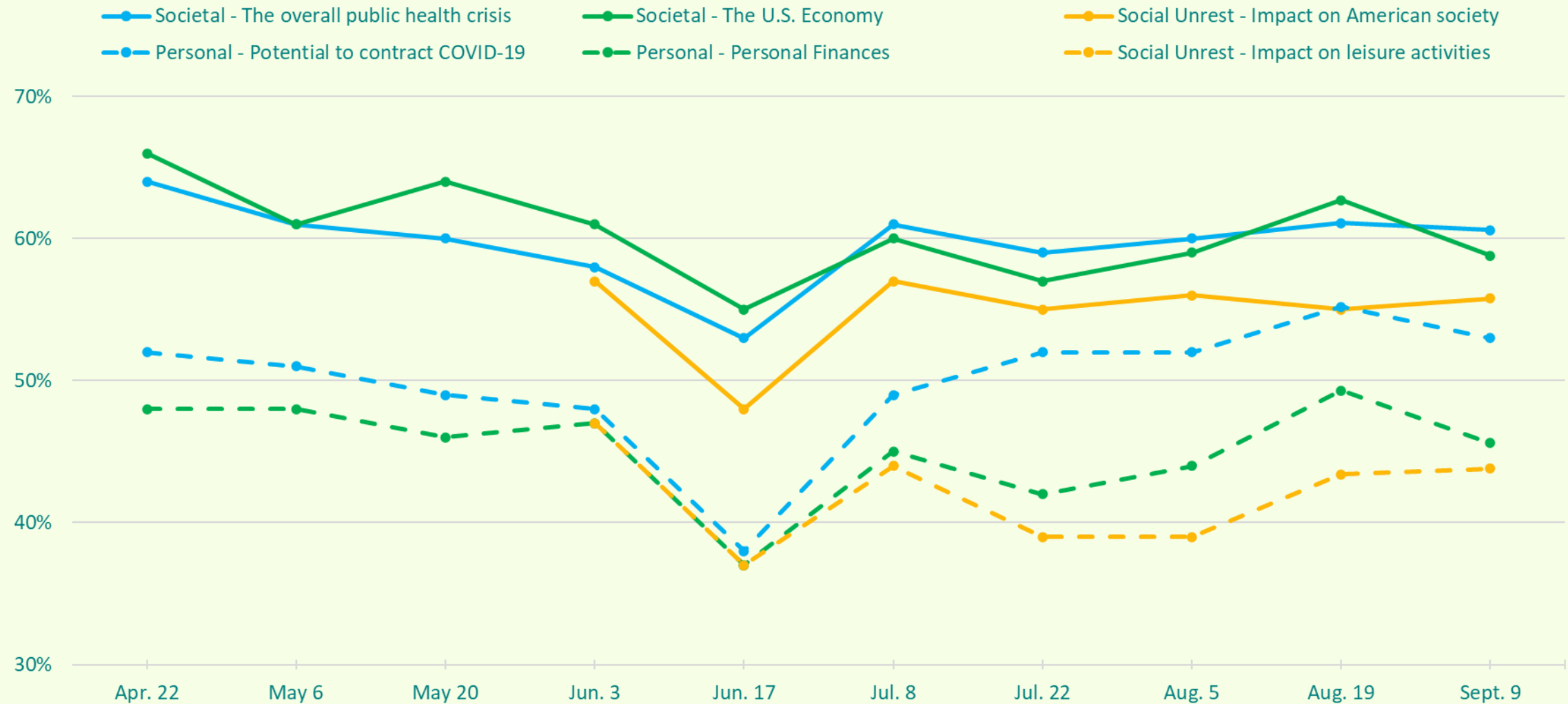
**RON BONJEAN, PARTNER, ROKK SOLUTIONS  
RICH THAU, PRESIDENT OF ENGAGIOUS  
JON LAST, PRESIDENT OF SPORTS & LEISURE RESEARCH GROUP  
GINA DERICKSON, RESEARCH DIRECTOR AT ENGAGIOUS**

# CONFIDENCE BAROMETER SHOWS SLIGHT UPTICK



Back to Normal Barometer, Sept. 9, 2020

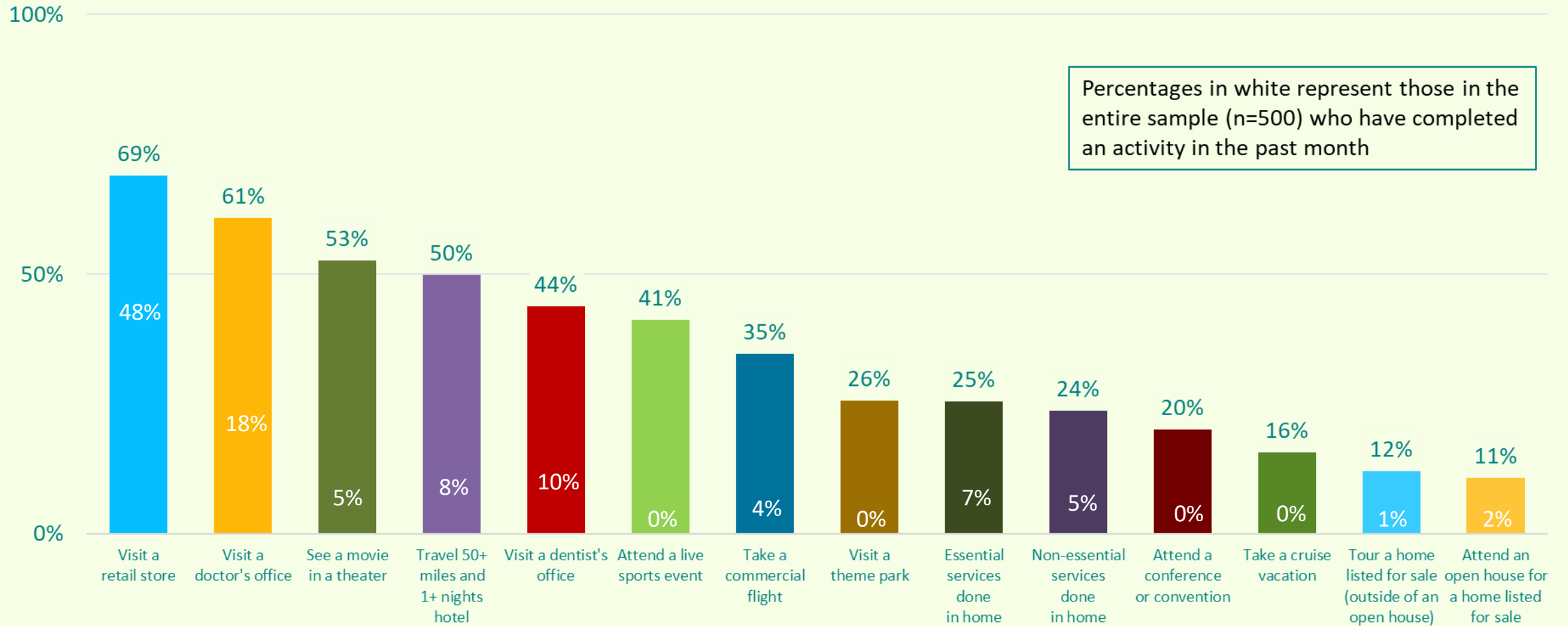
# SOCIETAL CONCERNS LEVEL OFF; REMAIN ABOVE PERSONAL



Back to Normal Barometer, Sept. 9, 2020 ; % who are very concerned

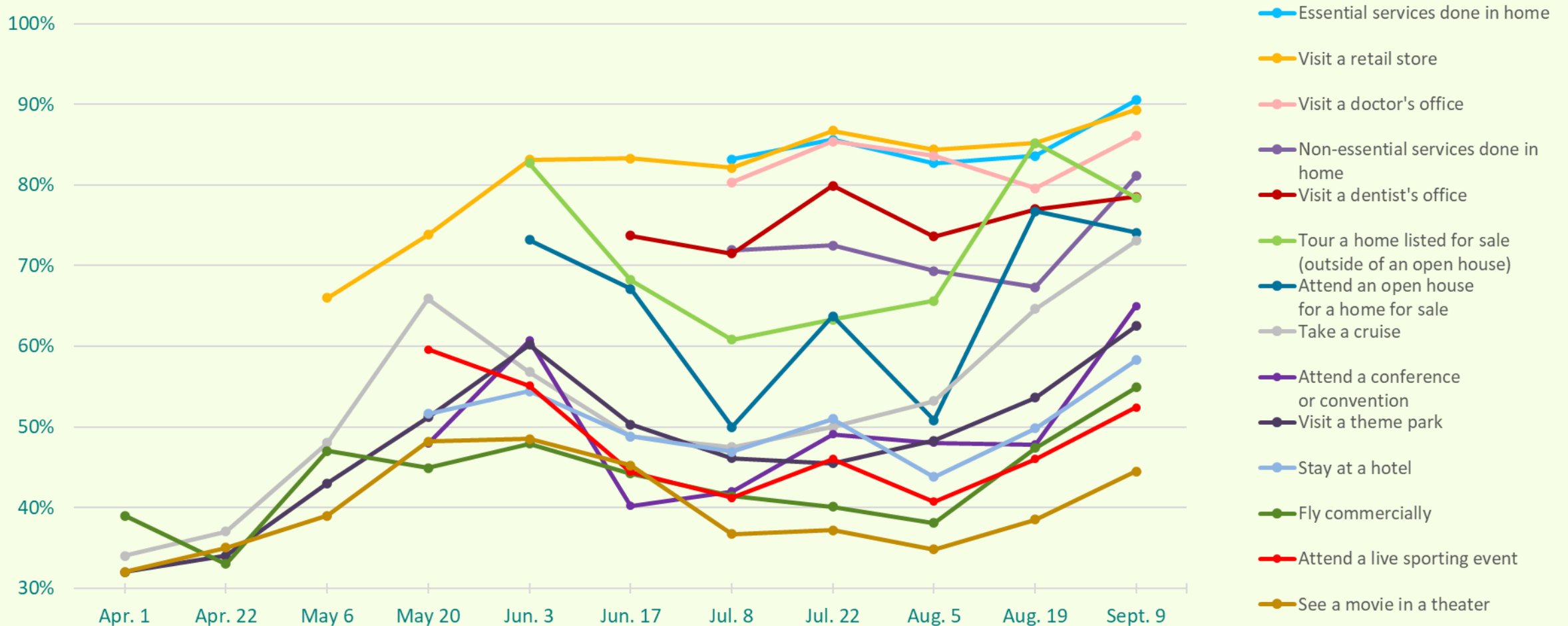
# CONTEXT: RESPONDENTS ACTIVELY ENGAGE

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



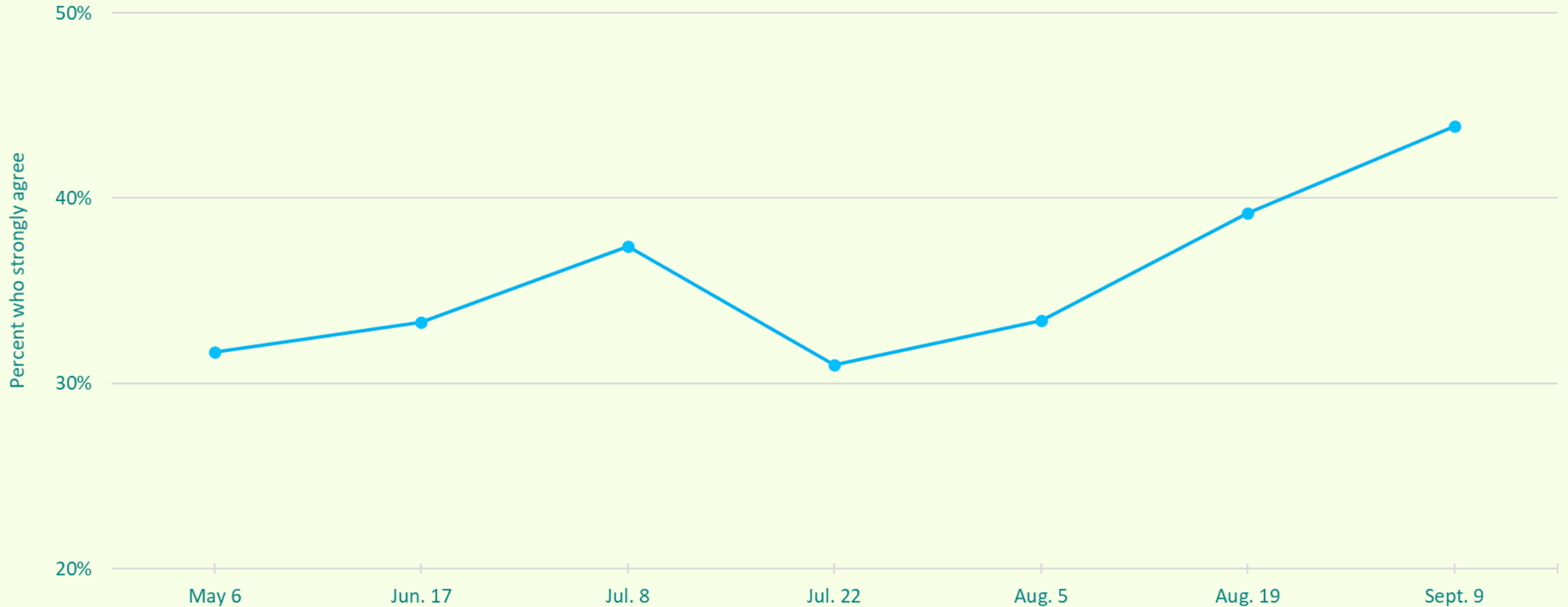
# INCREASING NUMBERS ARE READY TO GO / RECENTLY ACTIVE

[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



# MORE ARE READY THAN EVER TO RE-OPEN BUSINESSES

It's time for the country to open for business again.

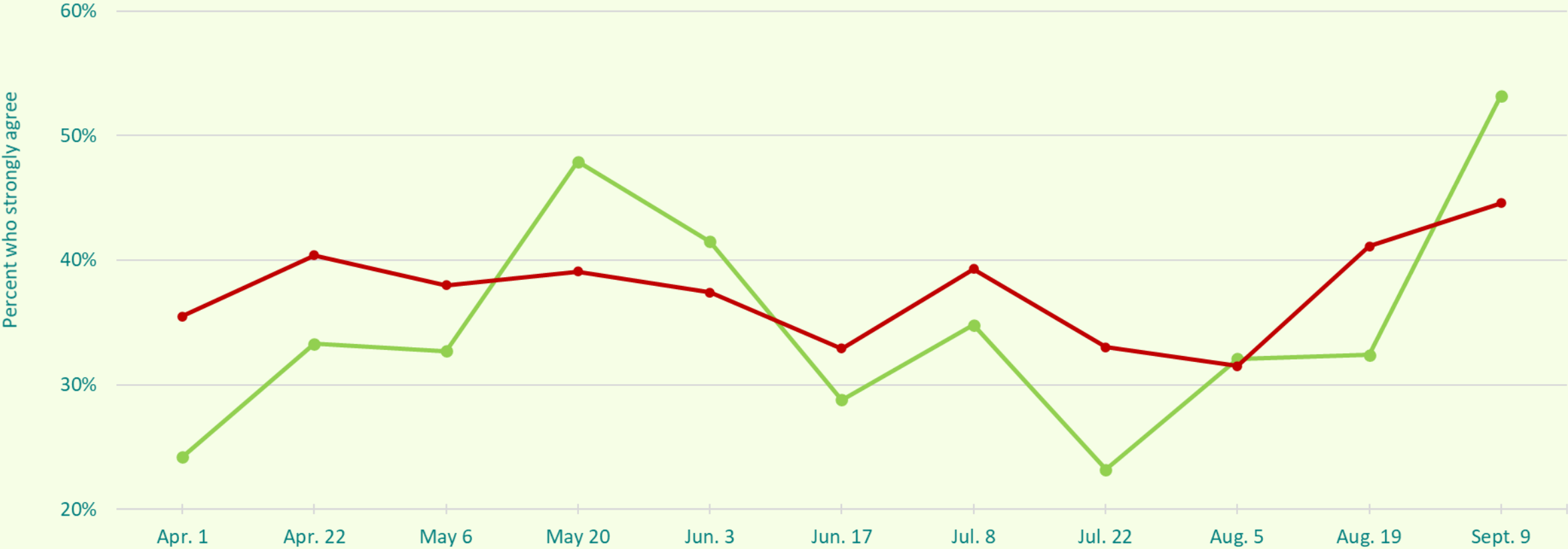




# MORE ARE READY TO TRAVEL FOR BUSINESS & PLEASURE

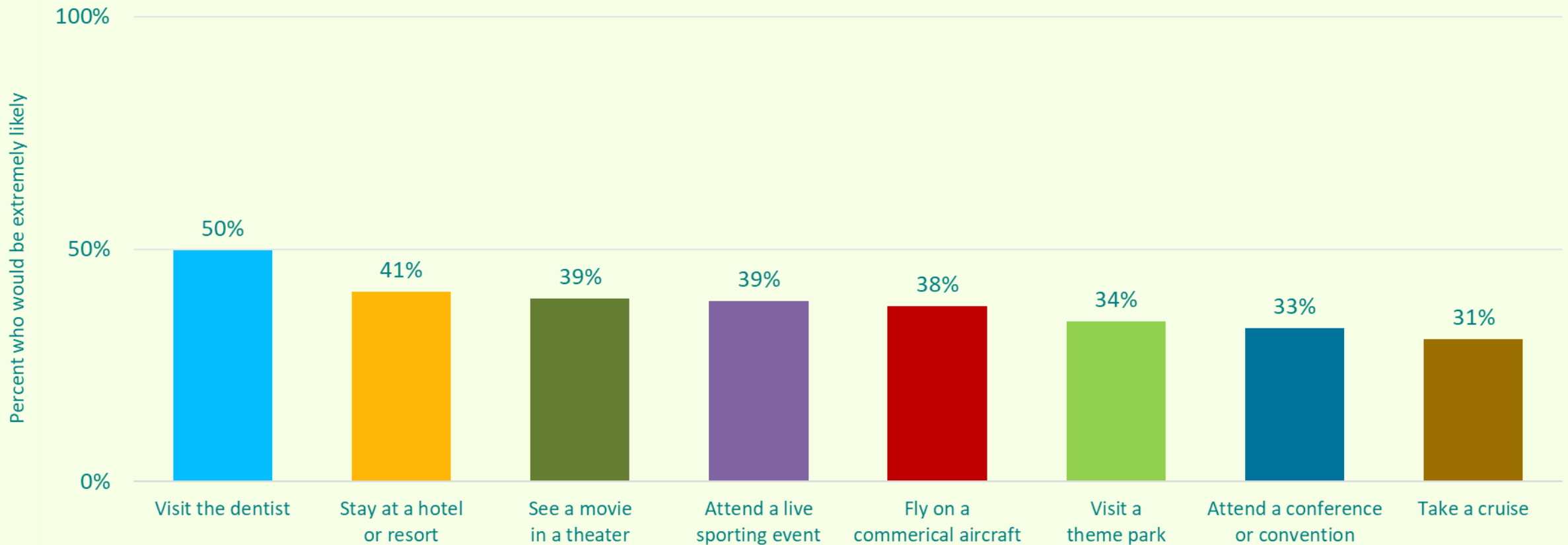
Looking ahead, please indicate how much you agree or disagree with each of the following statements...

- I plan to take the same number or more business trips over the next six months as I did last year.
- Taking a vacation of 500 miles or more is a priority for me and my family in the next 12 months.



# AND THEY'D BE EVEN MORE READY WITH RAPID TESTING

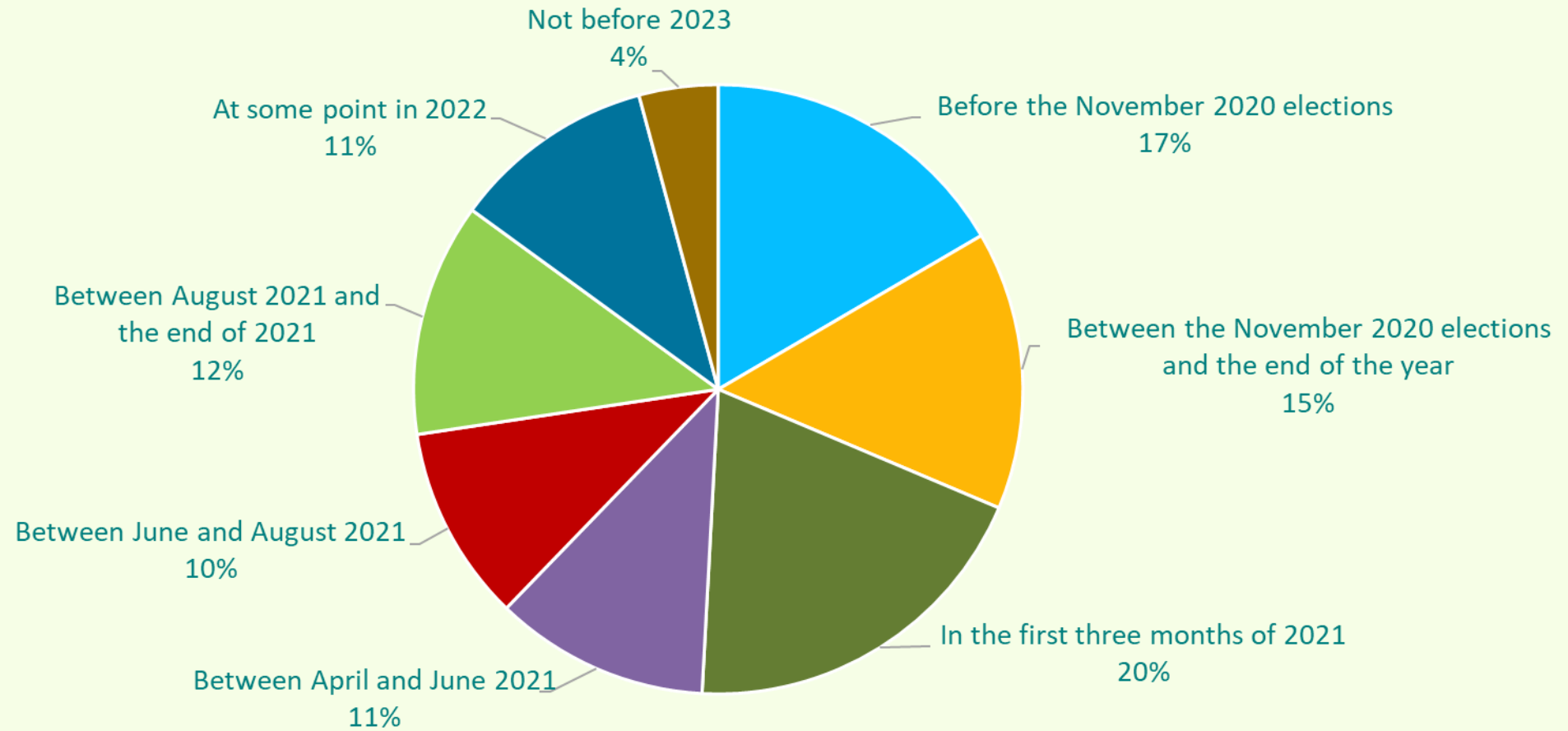
How much more likely would you be to do each of the following, if everyone received a rapid COVID-19 test prior to being allowed to engage in the activity, and only those negative were allowed to do so?





# 1/3 THINK WE'LL BE LESS FOCUSED ON COVID BY YEAR'S END

COVID-19 has affected our lives in many ways. By when do you expect that the disease will finally recede from our lives, to the point where we're not thinking about it on a daily basis?



# IN-DEPTH INTERVIEWS – SEEKING SIGNS OF NORMALCY



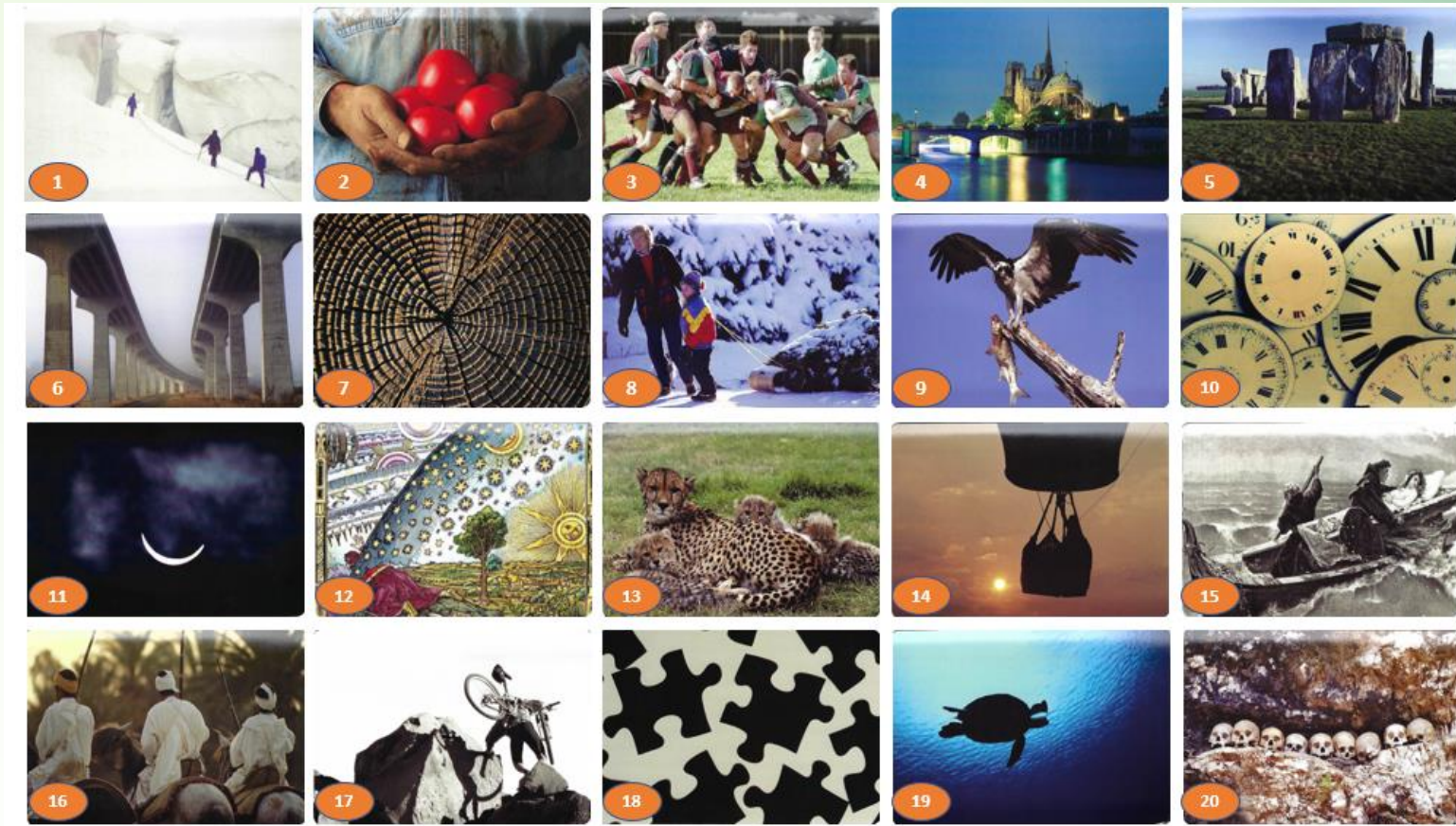
# DESPERATELY SEEKING SOCIAL INTERACTIONS

- Labor Day weekend – familiar outings on a much smaller scale than typical
- Even small social interactions give promise of normalcy
  - *“I had a fair amount of just random interactions with people...we were still social distancing, but it felt much more normal than looking at strangers like ‘stay away from me.’”*
- First thing they want to do after pandemic: Any activity with friends or family
  - Ex. gathering, dinner, game night, hugging, shaking hands, meeting people
- Hurricanes, wildfires, and September snow add to their stress



# EMOTIONAL TOLL OF THE PANDEMIC

A projective exercise:



## 2020:



Social distancing, outdoor activities are the norm



Uncertainty, anxiety, confusing, so many pieces to fit together (pandemic, social issues, weather)

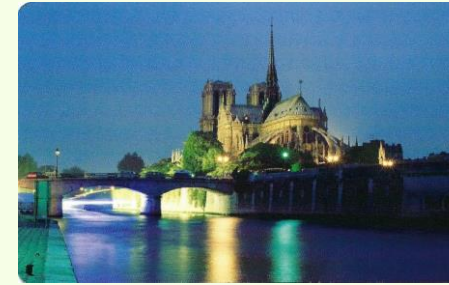


Danger, struggling, not working together, yet some examples of compassion

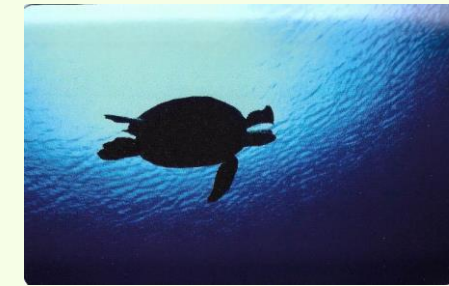
## End of Pandemic:



Family time, normalcy, traditions restored, being close to others



Return to travel, getting out



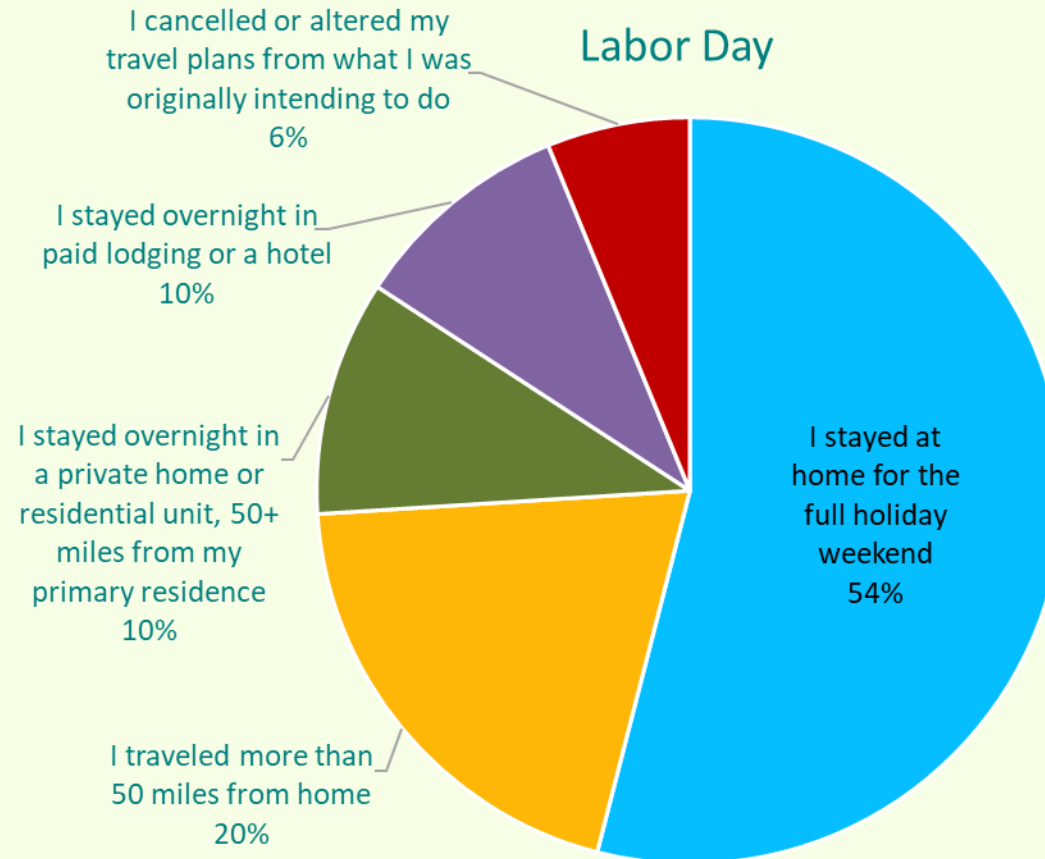
Serene, relaxed, relieved, quiet, low-key



# Labor Day Weekend

# 2 OUT OF 5 TRAVELED OVER LABOR DAY WEEKEND

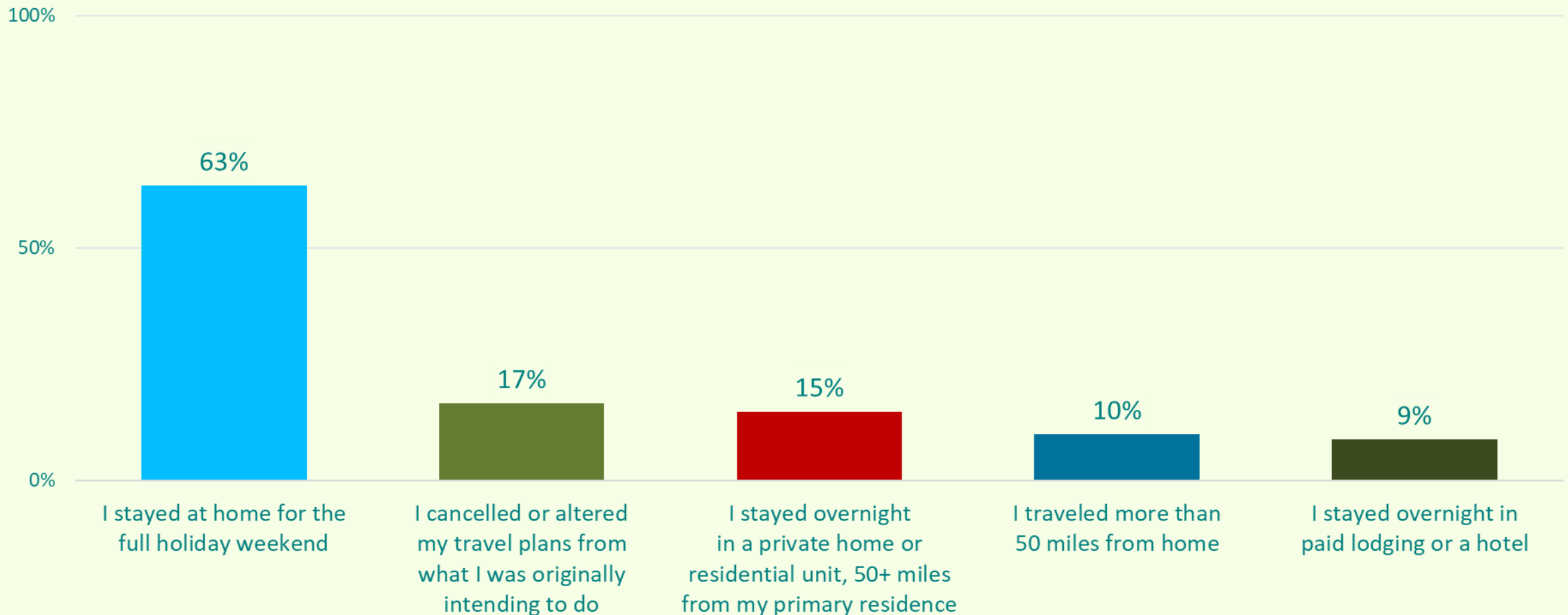
Which of the following applies to the Labor Day weekend just completed?





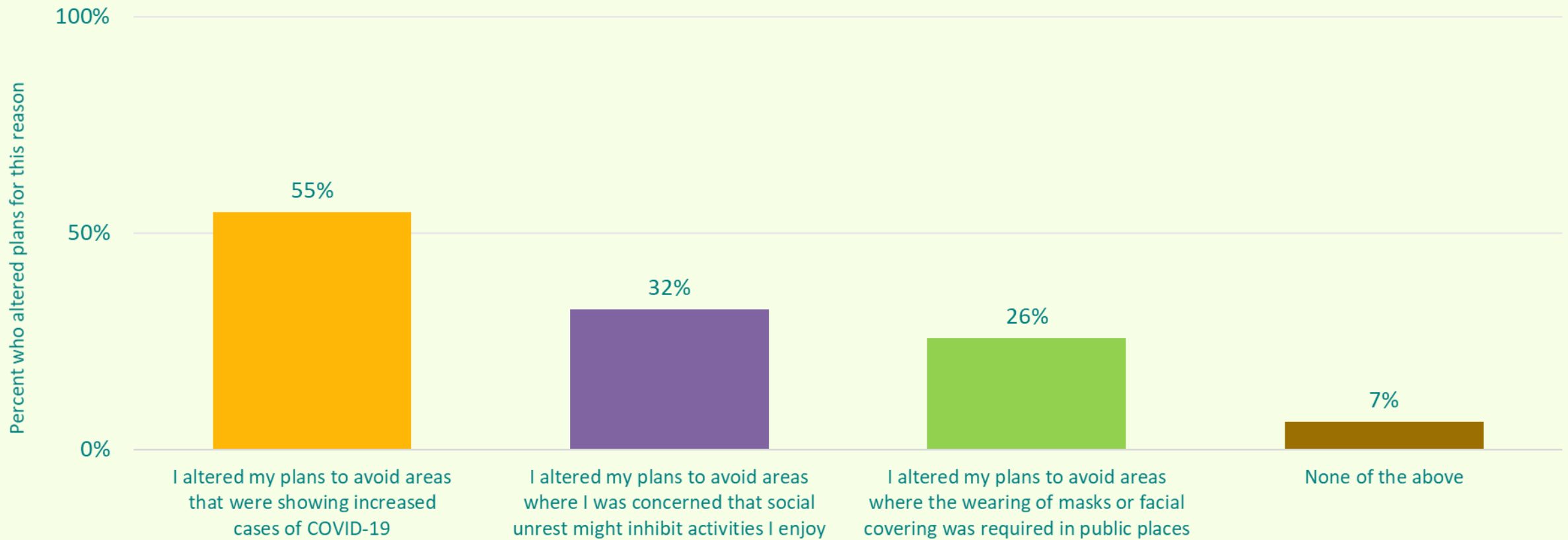
# FOR COMPARISON: 2/3 STAYED AT HOME JULY 4 WEEKEND

Which of the following applies to the Fourth of July weekend just completed?



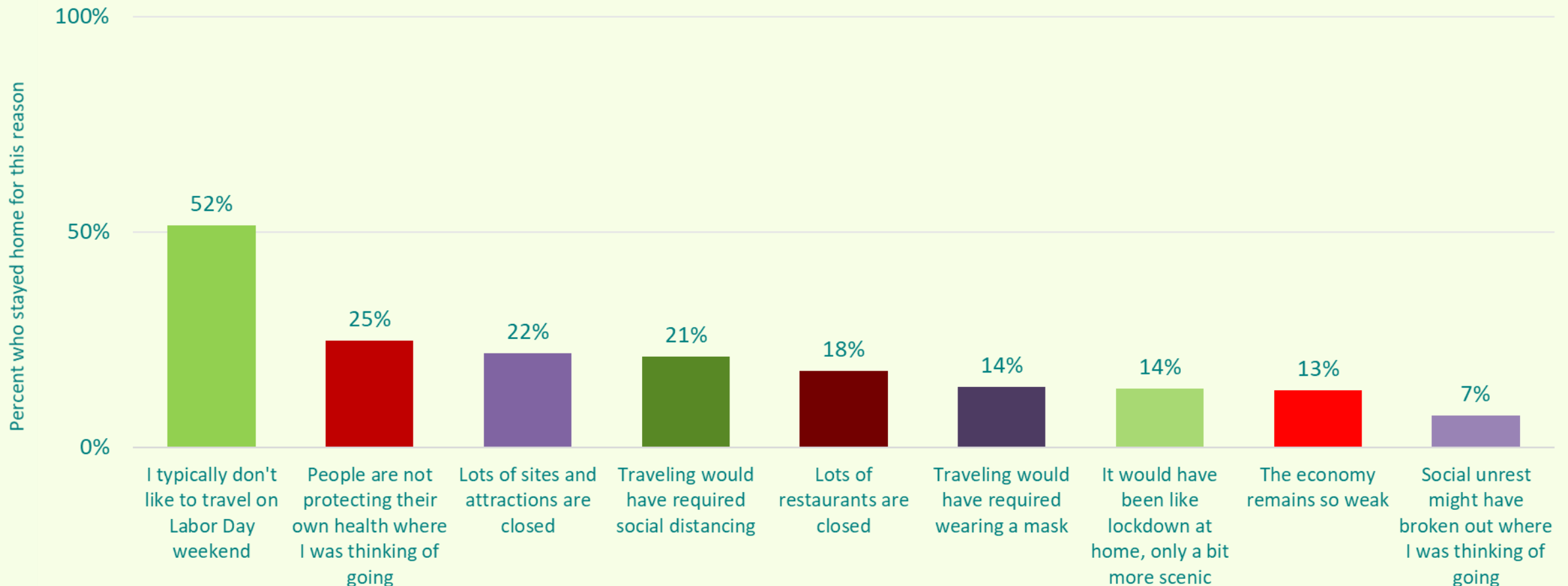
# THOSE WHO ALTERED LABOR DAY PLANS DID SO FOR HEALTH

[Among those who cancelled or altered Labor Day travel plans:] Which of the following affected your Labor Day weekend travel plans? (Check all that apply)



# HALF OF THOSE WHO STAYED HOME USUALLY STAY HOME

[Among those who stayed home Labor Day weekend:] Which, if any, of the following were reasons why you stayed home for the holiday weekend?

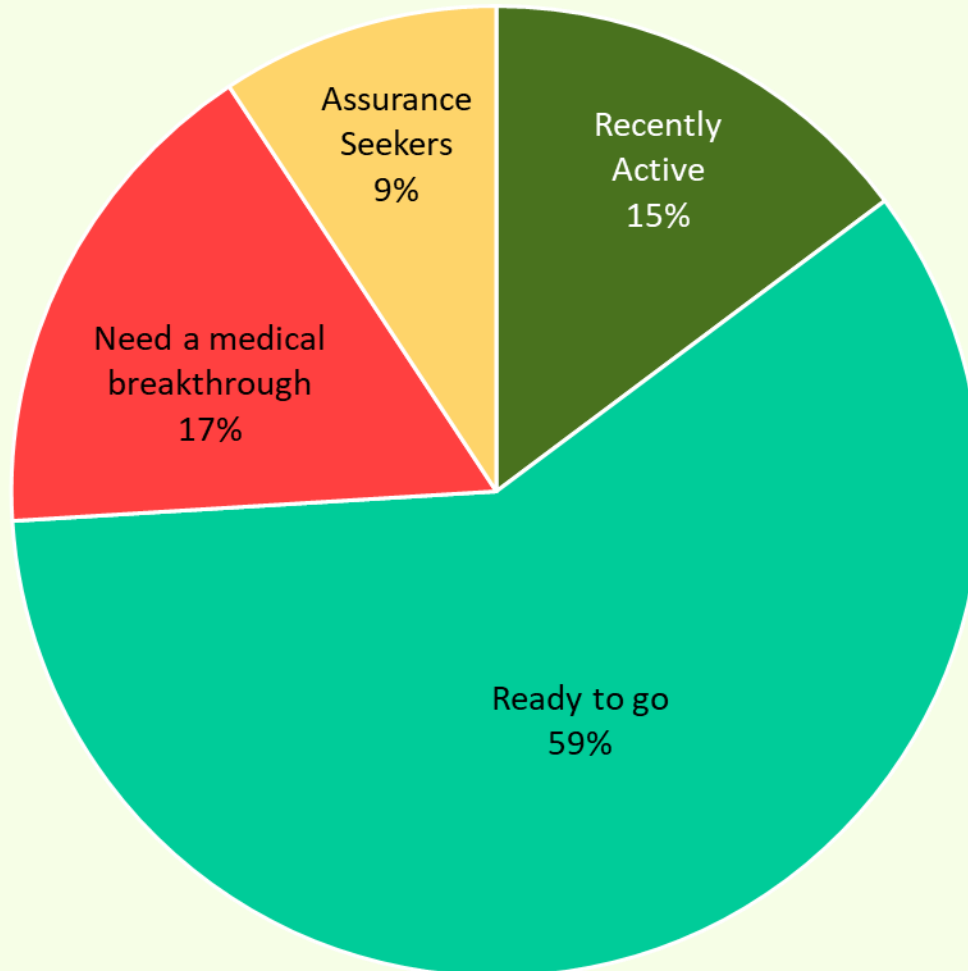


# NAR



# READY OR NOT: ATTEND AN OPEN HOUSE FOR A HOME LISTED FOR SALE

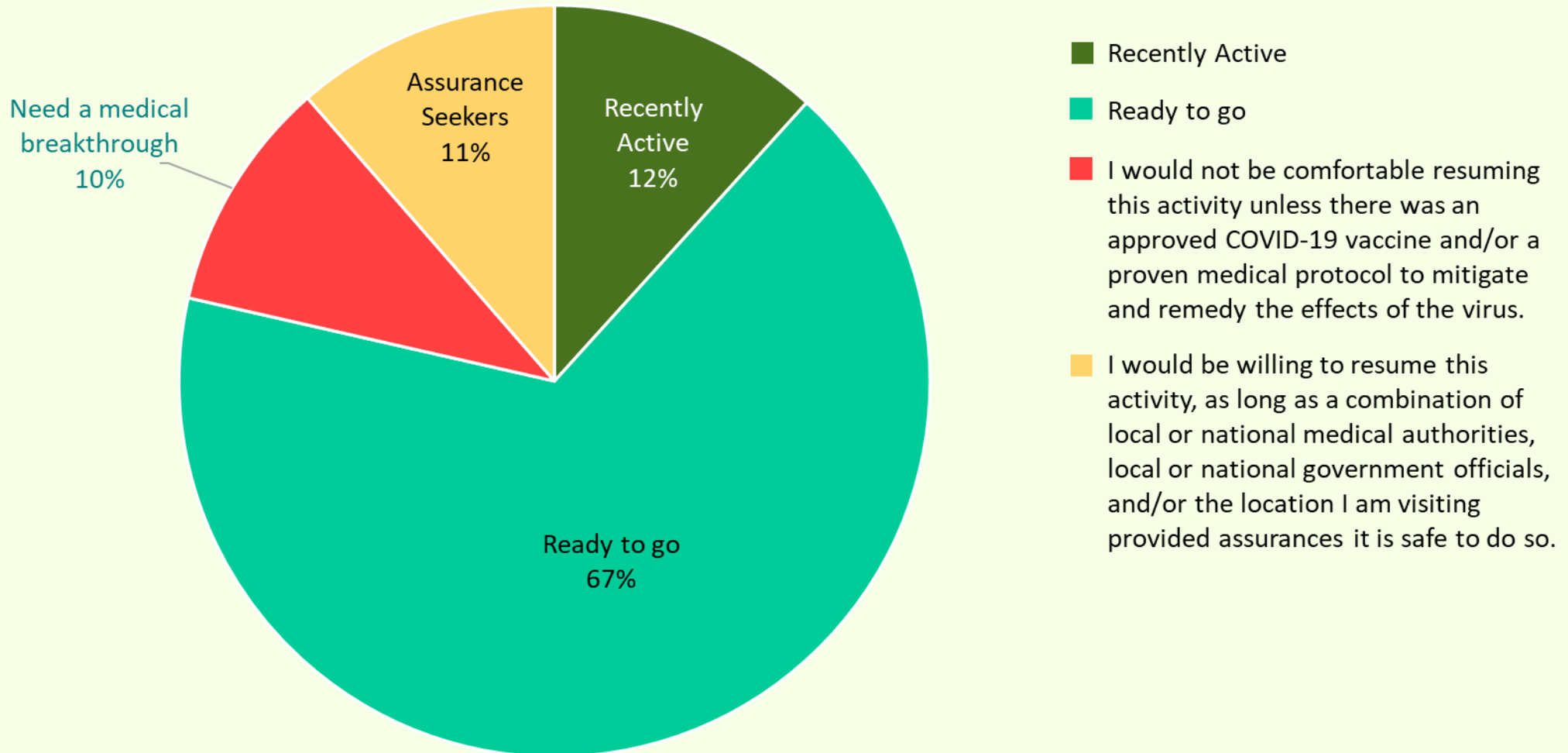
Which of the following conditions is closest to your current point of view... Attend an open house for a home listed for sale



- Recently Active
- Ready to go
- I would not be comfortable resuming this activity unless there was an approved COVID-19 vaccine and/or a proven medical protocol to mitigate and remedy the effects of the virus.
- I would be willing to resume this activity, as long as a combination of local or national medical authorities, local or national government officials, and/or the location I am visiting provided assurances it is safe to do so.

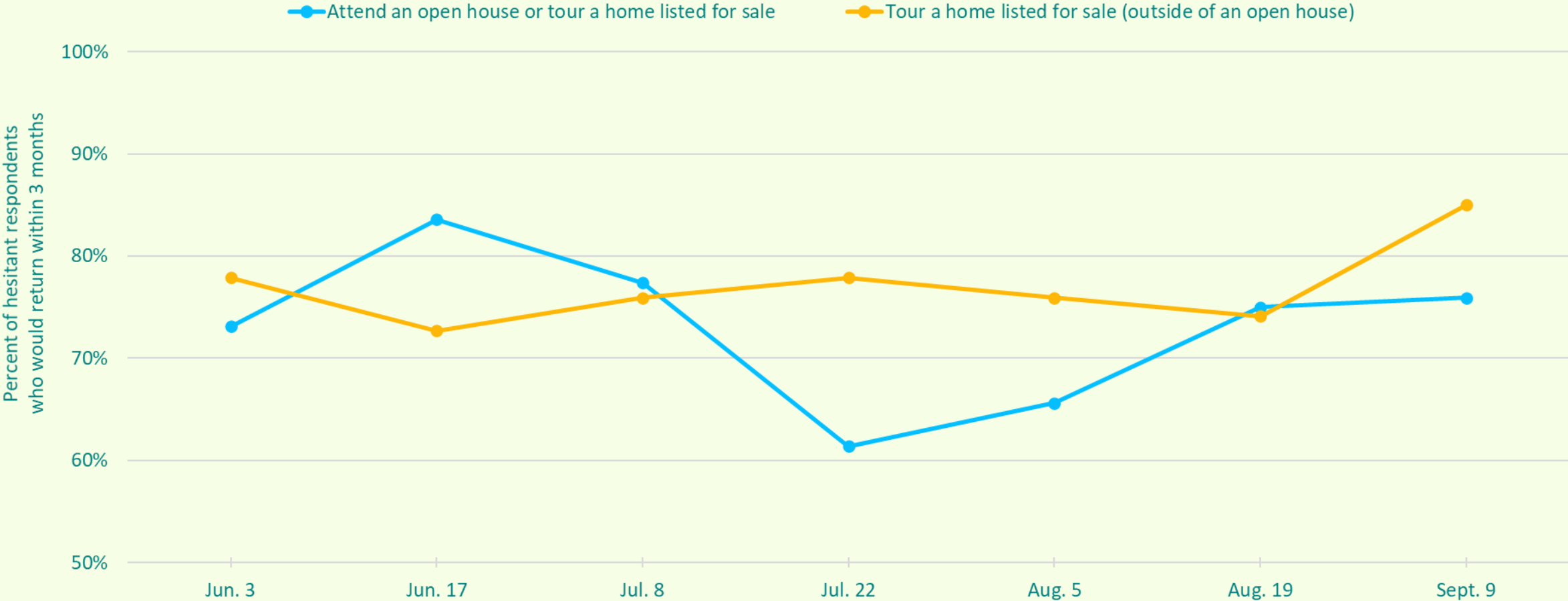
# READY OR NOT: TOUR A HOME LISTED FOR SALE (OUTSIDE OF AN OPEN HOUSE)

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



# REALTORS: RETURN IN 3 MONTHS

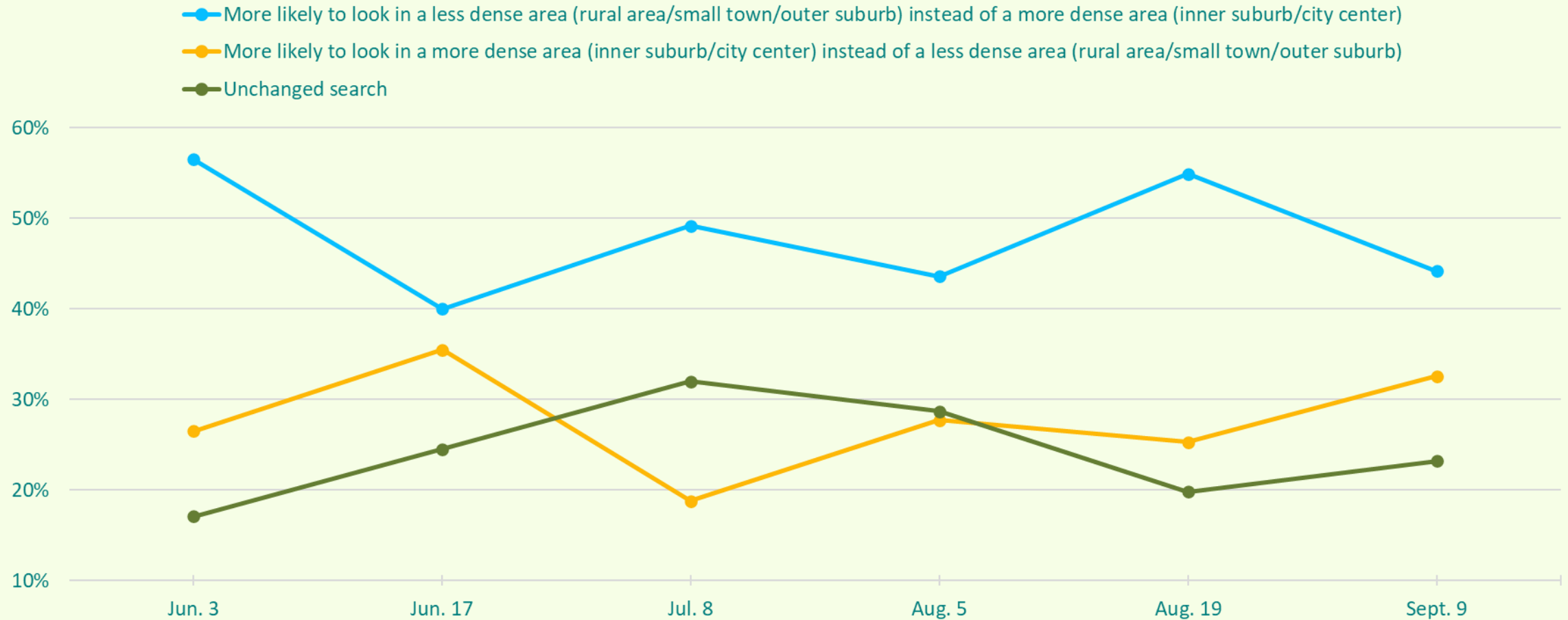
[Among those hesitant:] Assuming you had the necessary assurances that it was safe to resume normal activities, how quickly would you next...





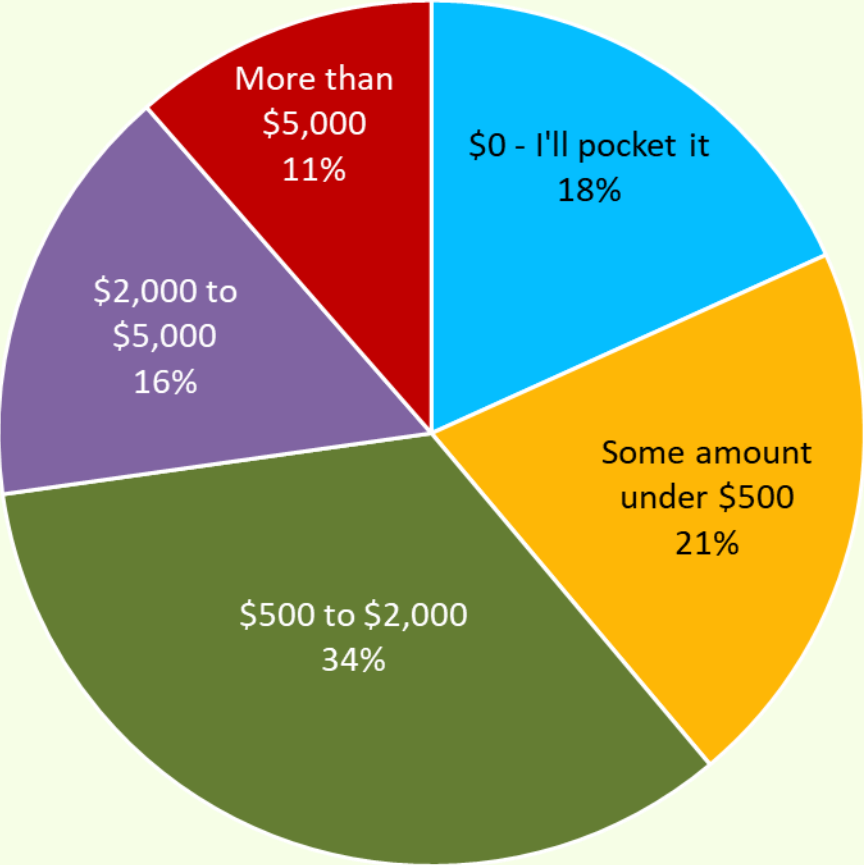
# THEY ARE STILL LOOKING IN LESS-DENSE AREAS

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



# MANY ARE SHIFTING SIZABLE SUMS TO HOME IMPROVEMENT

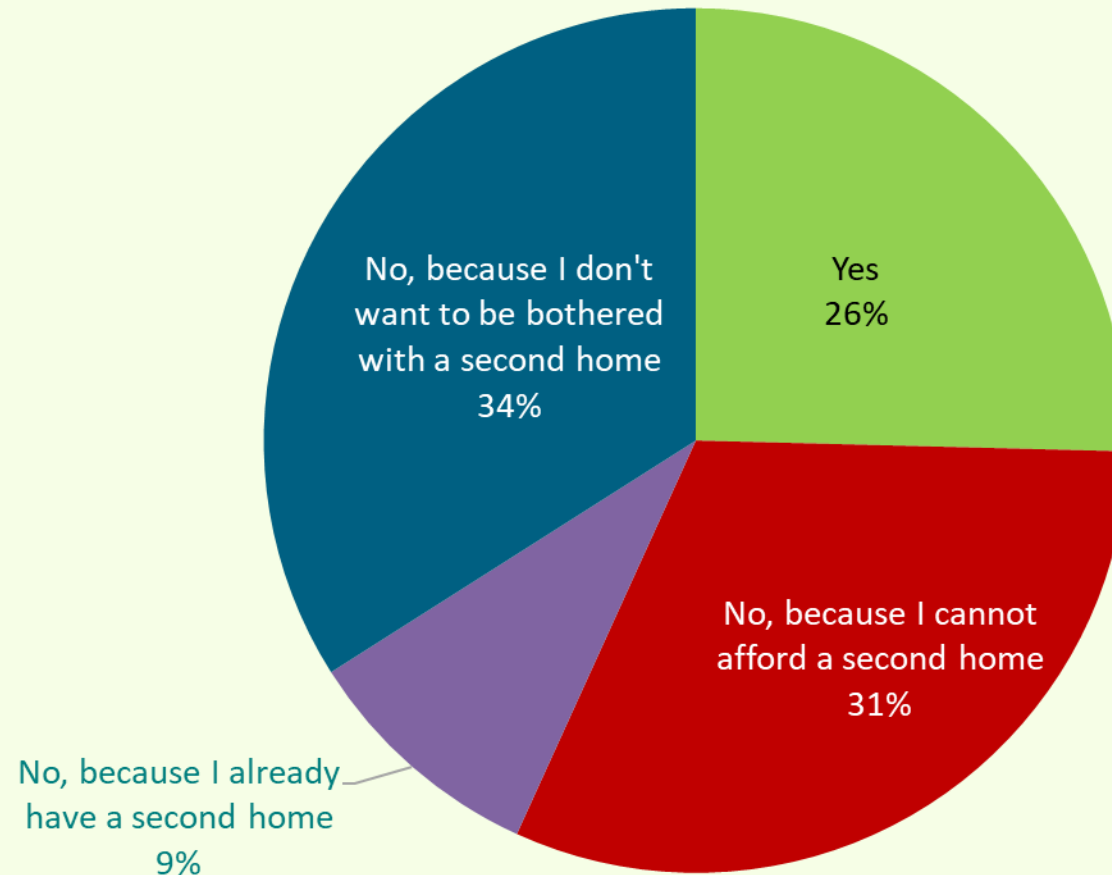
During 2020, how much money do you expect to shift away from travel and leisure spending, and redirect it towards making home improvements?



n=500, Back to Normal Barometer, Sept. 9, 2020

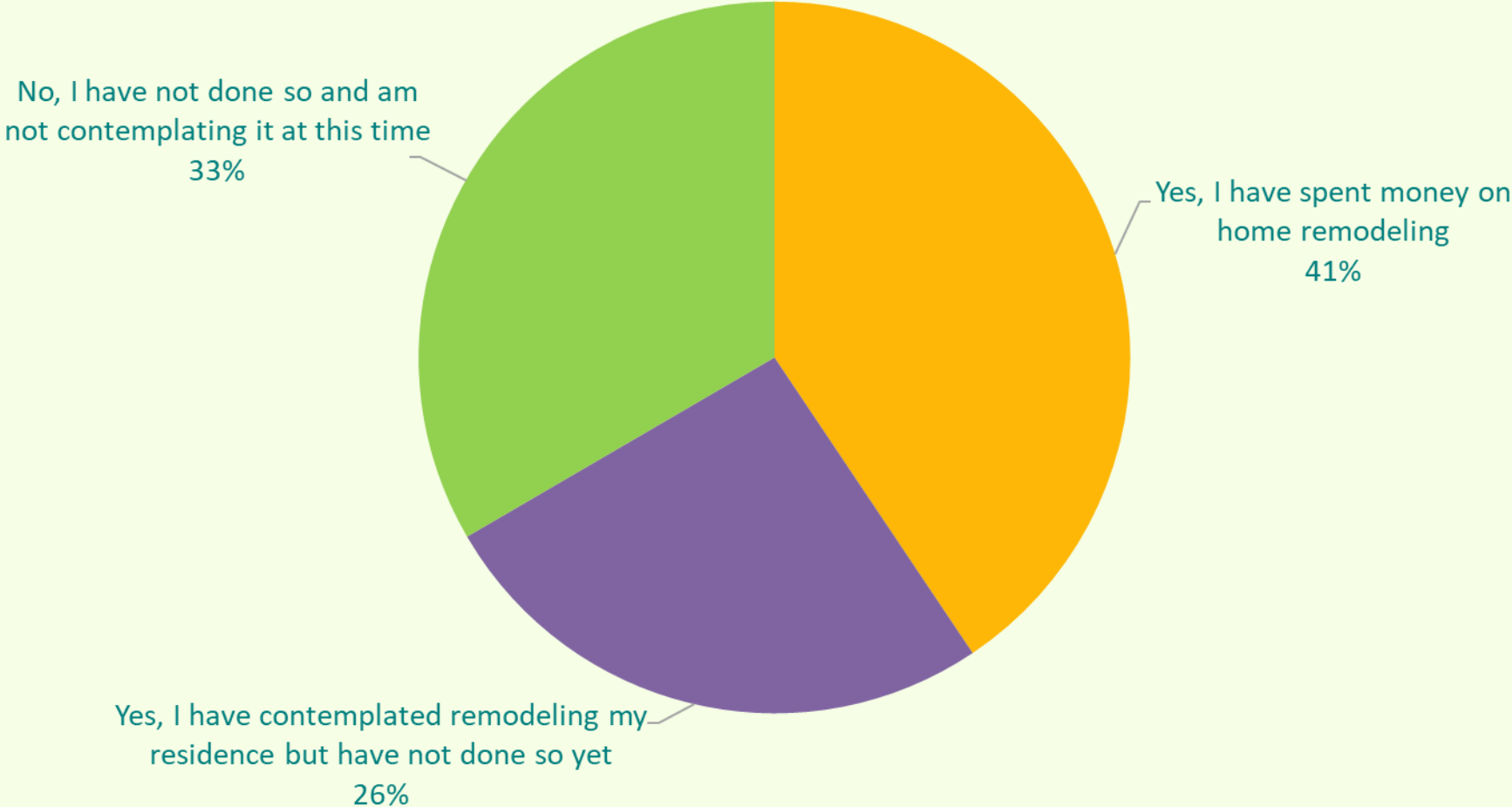
# 1/4 ARE CONSIDERING A SECOND HOME

During the pandemic have you seriously considered, or started looking at, purchasing a second home?



# MANY ARE THINKING ABOUT REMODELING, OR HAVE ALREADY

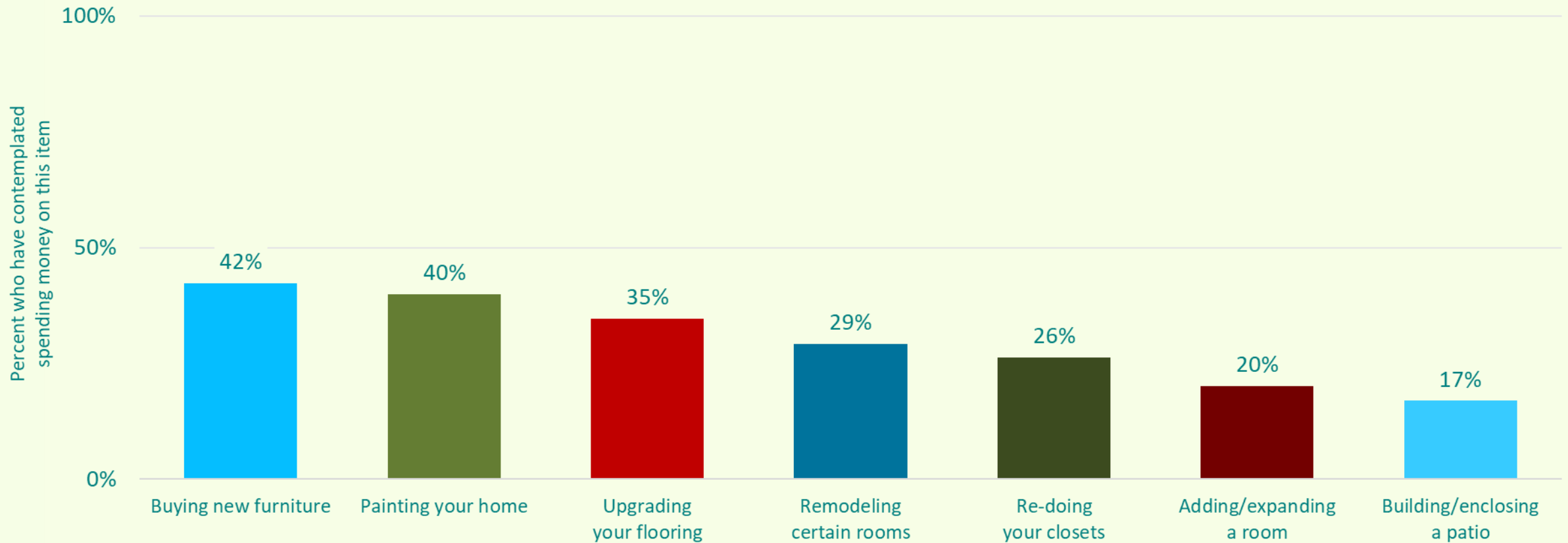
During the pandemic have you spent money or contemplated spending money on remodeling your residence?



n=500, Back to Normal Barometer, Sept. 9, 2020

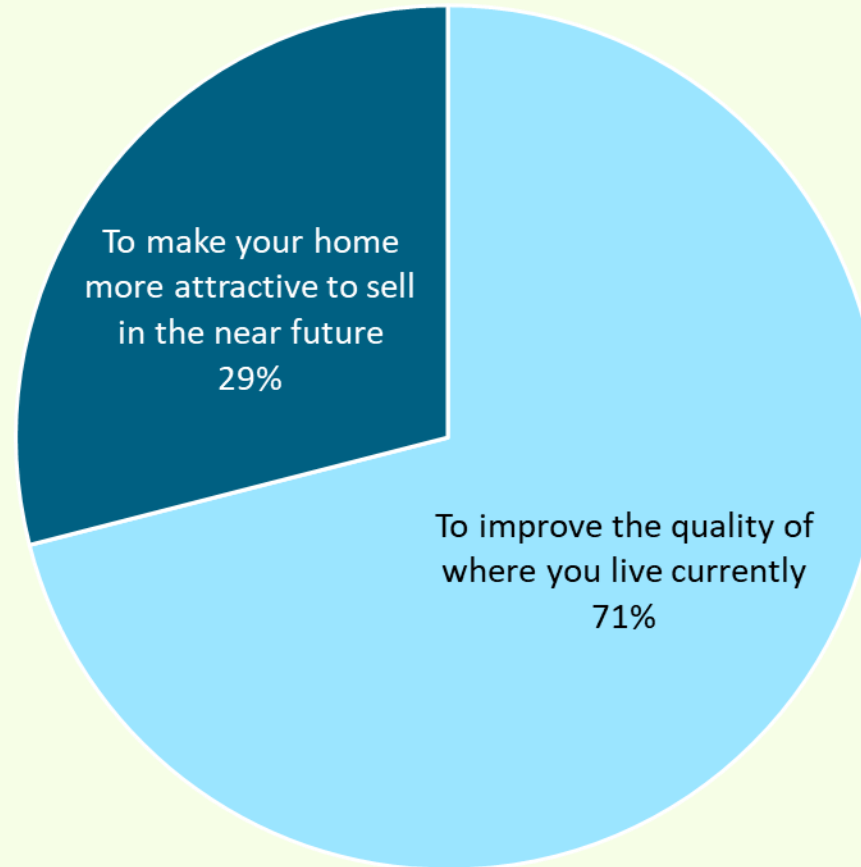
# FURNITURE AND PAINTING ARE TOP REMODELING SPENDS

How are you contemplating spending money on remodeling? (Check all that apply)



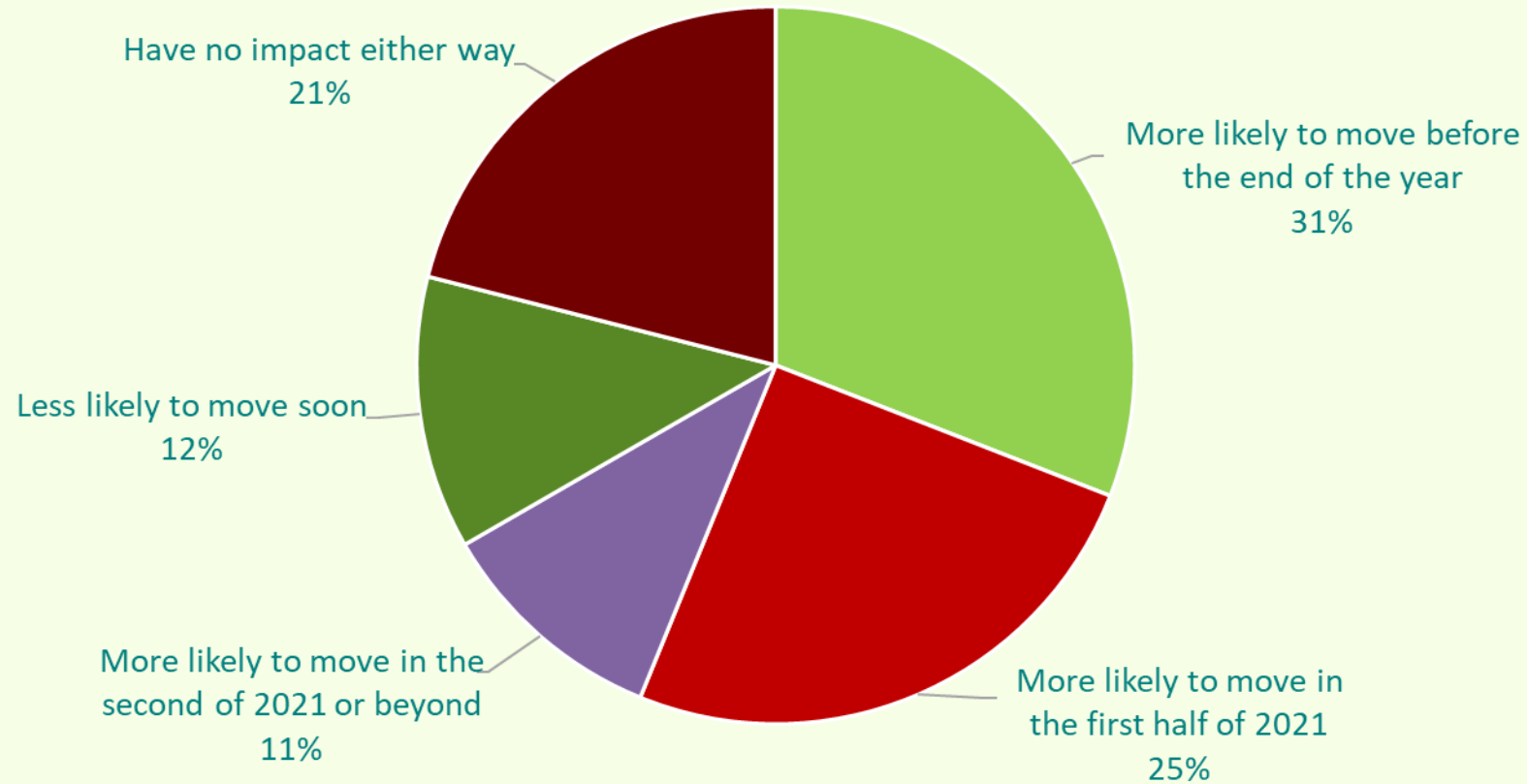
# REMODELING IS DONE MOSTLY TO IMPROVE QUALITY OF LIFE

Are you doing the remodeling primarily...



# BUT REMODELING MAKES THEM WANT TO MOVE

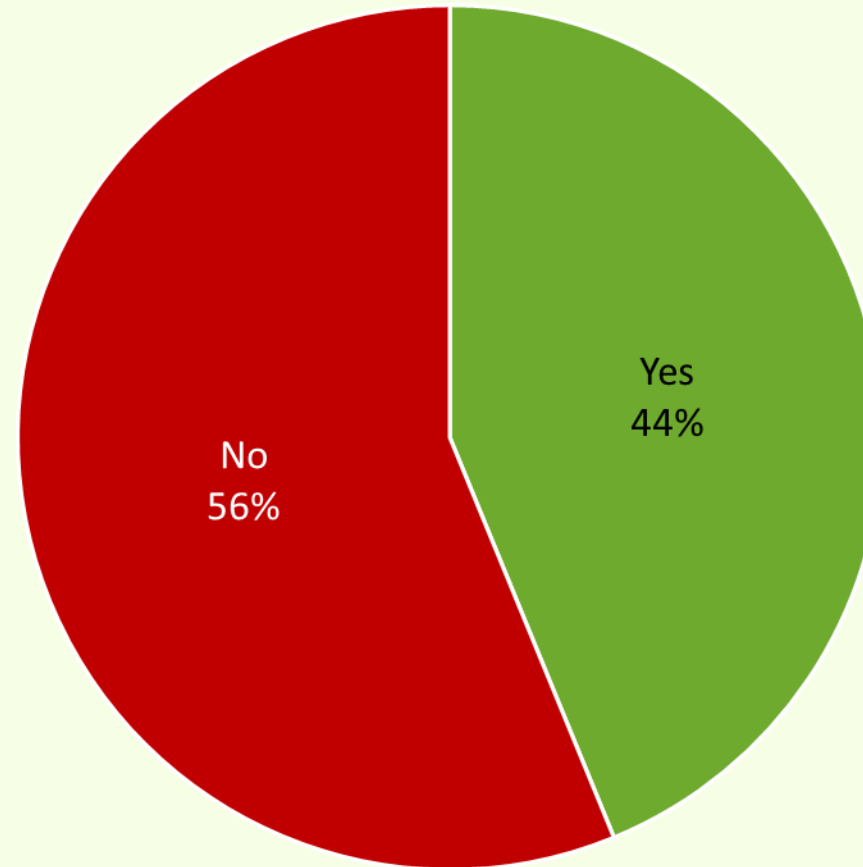
Does the remodeling you're doing or have recently completed make you...





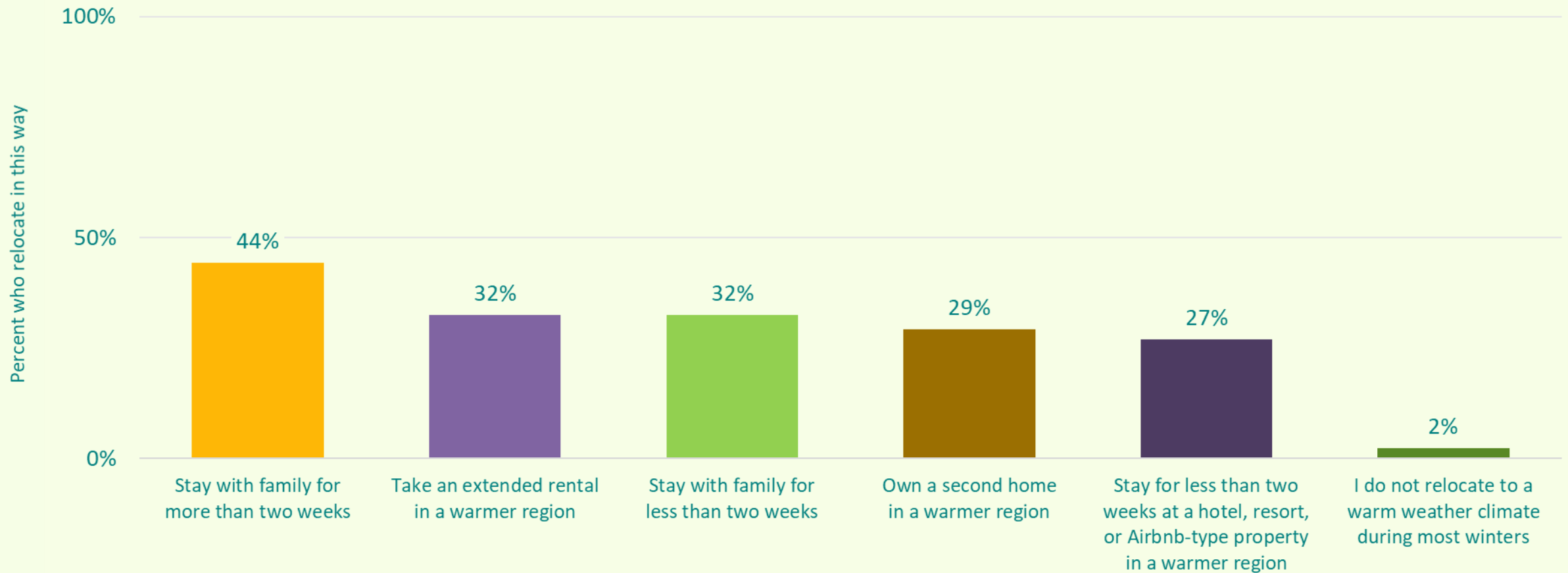
# NEARLY HALF RELOCATE IN THE WINTER

During most winters, do you typically relocate at least part of the time from a cold weather climate to a warm weather climate?



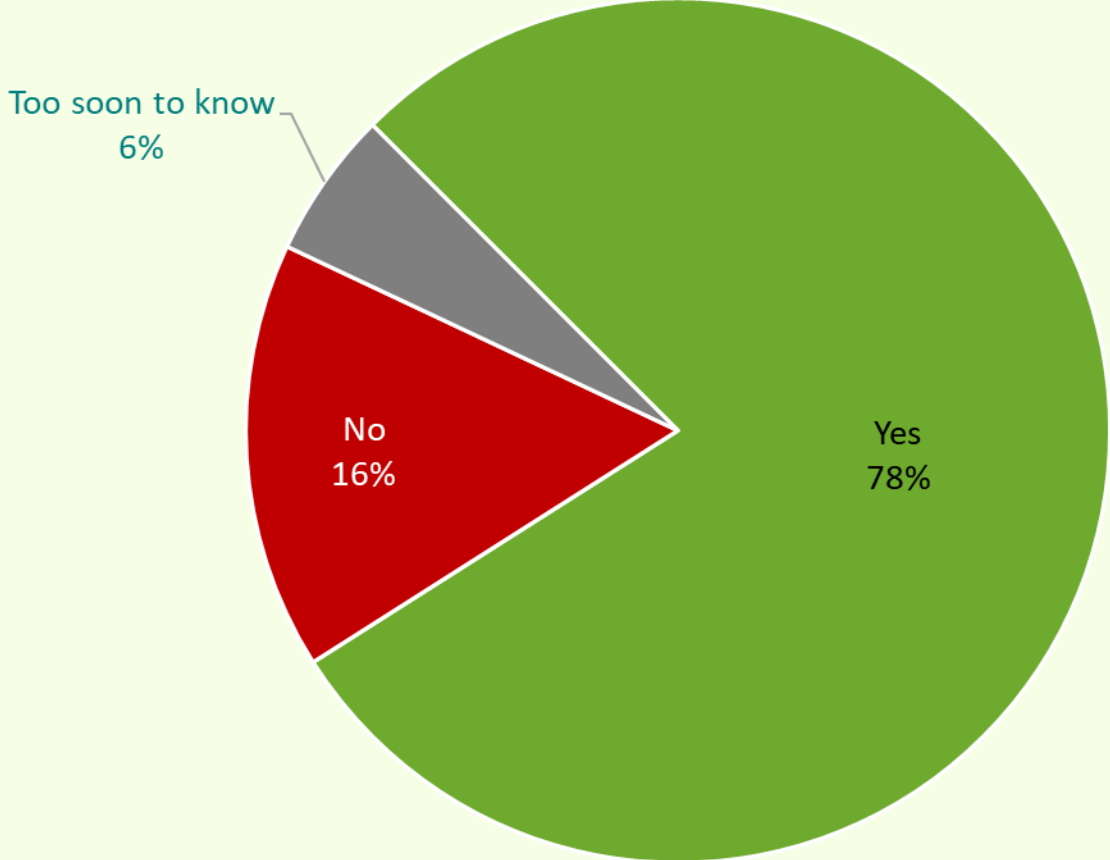
# WINTER RELOCATION MEANS STAYING WITH FAMILY

During most winters, how do you typically relocate at least part of the time from a cold weather climate to a warm weather climate? (Check all that apply)



# MOST WHO TYPICALLY RELOCATE PLAN TO DO SO AGAIN

[Among those who typically relocate:] This winter, do you intend to relocate at least part of the time from a cold weather climate to a warm weather climate?

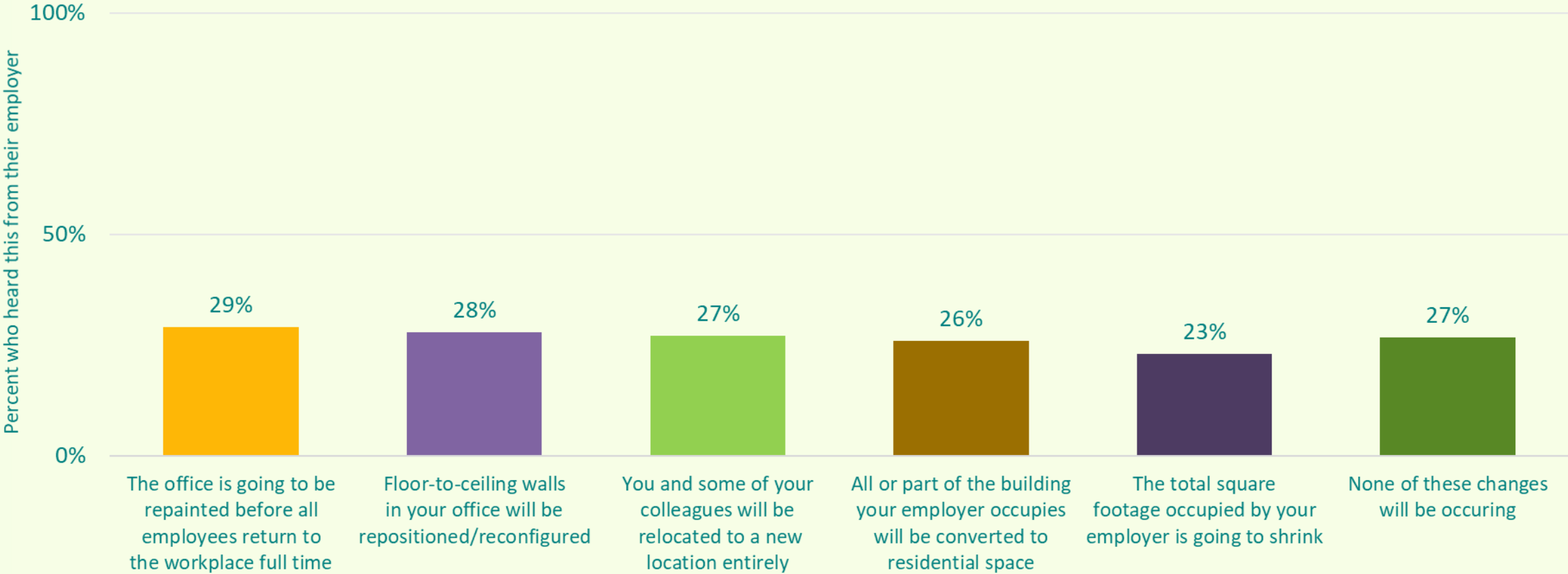


n=219, Back to Normal Barometer, Sept. 9, 2020

**FSB**

# HERE IS WHAT'S HAPPENING TO THEIR OFFICES

Which of the following messages, if any, have you heard from your employer about the business office where you work or worked prior to the pandemic?



n=265, Back to Normal Barometer, Sept. 9, 2020

# QUESTIONS

- What questions do you have for us?
- What questions should we ask in wave 12?

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