

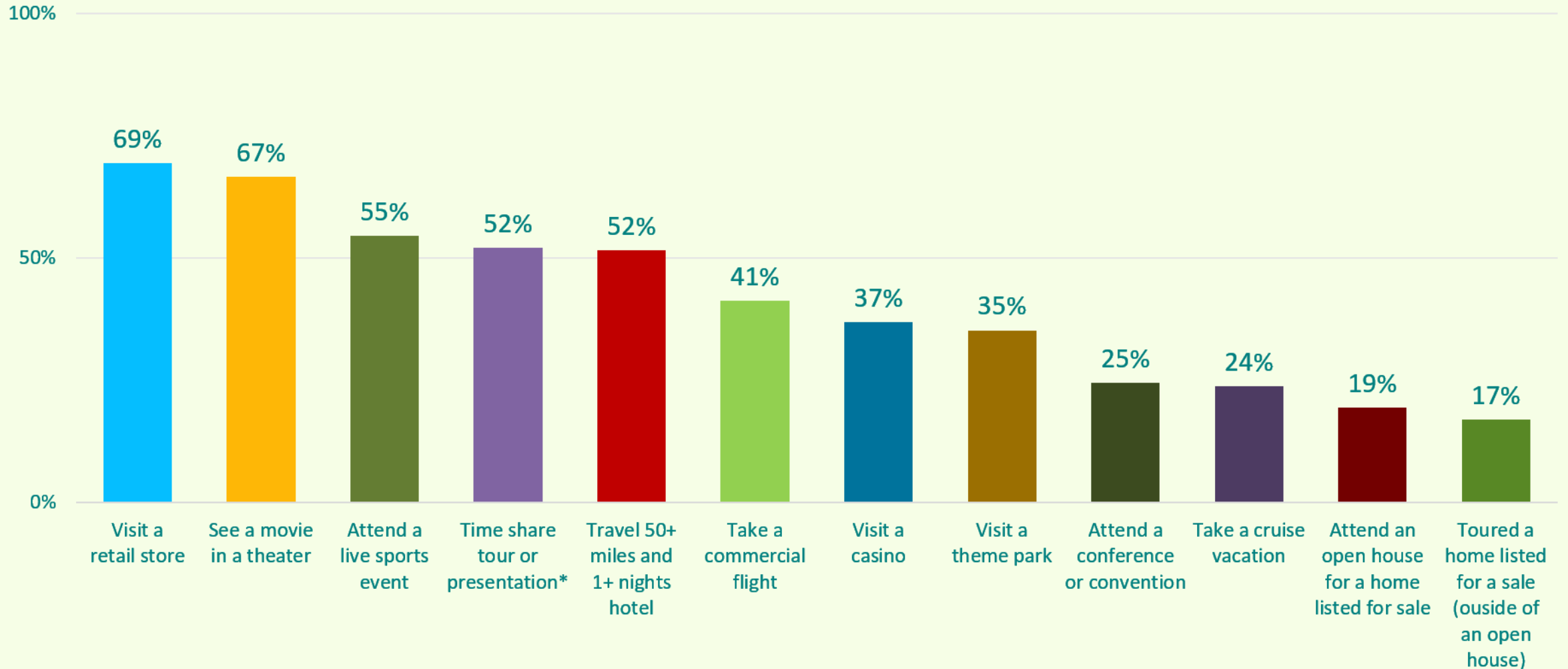
AMERICA CONFRONTS SHIFTING HEADWINDS

Public opinion insights from the June 3, 2020 benchmark
“Back-to-Normal Barometer”

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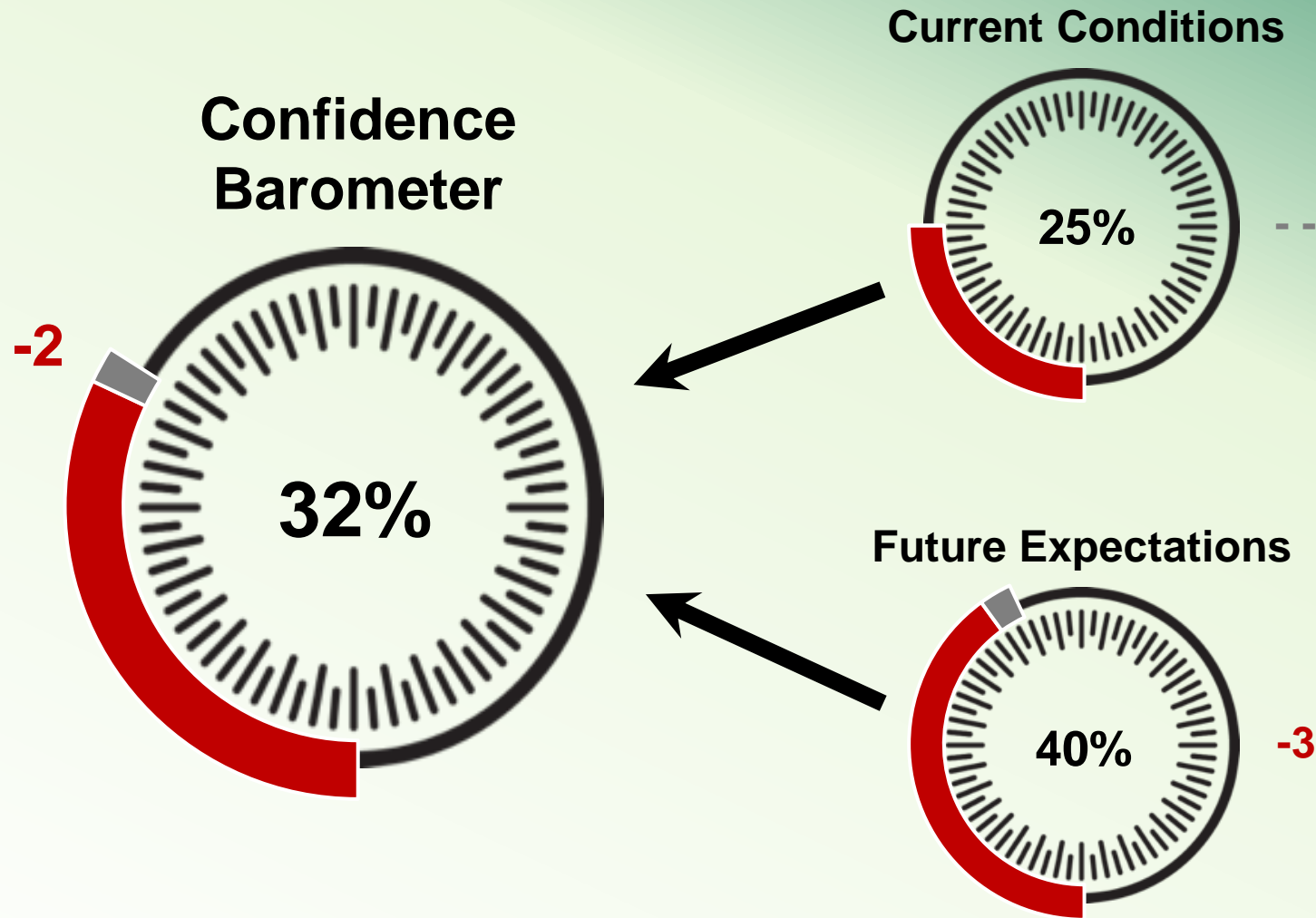
CONTEXT: RESPONDENTS ACTIVELY ENGAGE

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

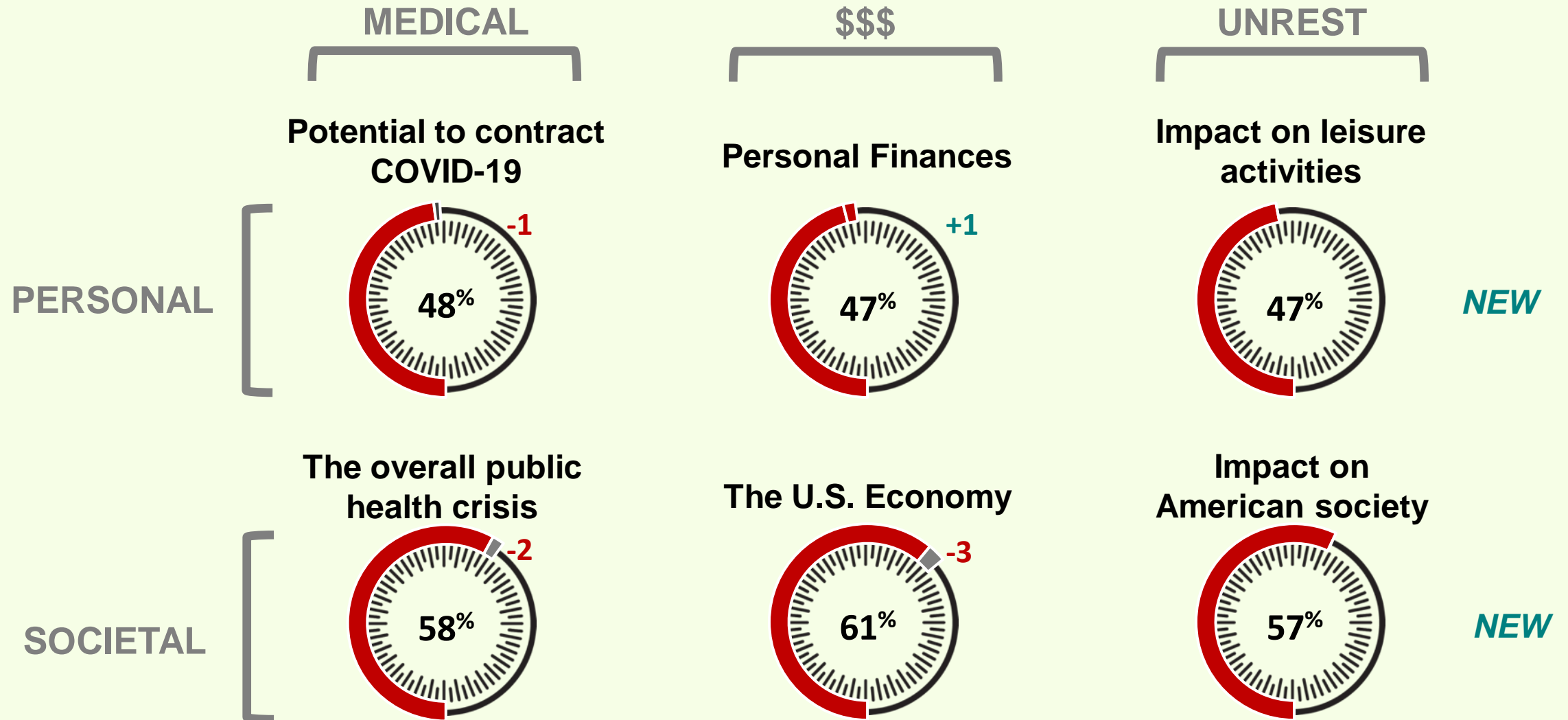


*Done in the past two years
n=613, Back to Normal Barometer, June 3, 2020

SLIGHT DROP IN CONFIDENCE FROM WAVE 4



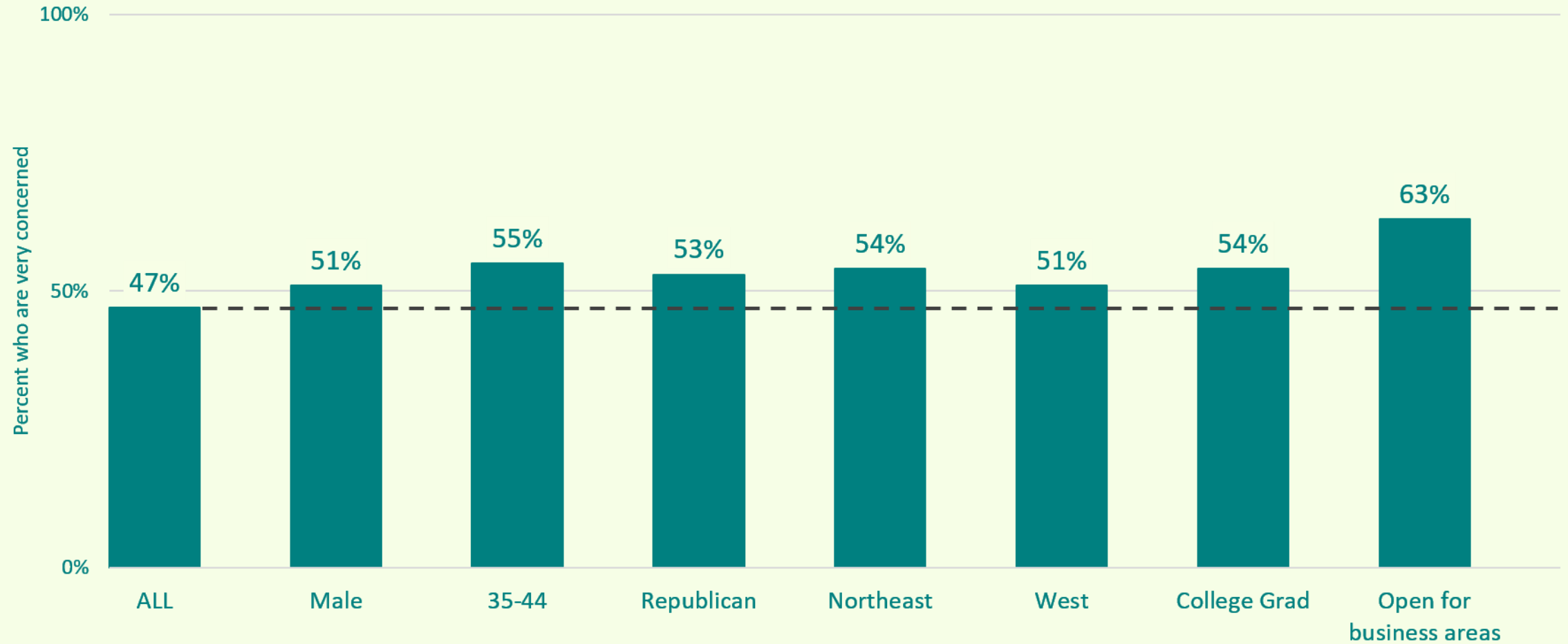
WHAT ARE CONSUMERS MOST CONCERNED ABOUT?



*Percentage who said they are extremely concerned
 Wave 5: n=613 Back to Normal Barometer – June 3, 2020
 Wave 4: n=593 Back to Normal Barometer – May 20, 2020

SOCIAL UNREST

How concerned are you regarding the potential for social unrest to affect your resumption of leisure activities?



WHAT THEY'RE SAYING ABOUT UNREST



UNREST RAISES ANXIETY LEVELS

- They fear unrest will result in a spike in Covid-19 cases
 - Media's shift in coverage to "normal news" may cause people to forget about Covid-19 risk
 - Protesting without social distancing
- Unrest is another reason to avoid travel to large cities this summer, although protests can be anywhere

"[This summer] I wouldn't go to Chicago with all the protests and the riots. I wouldn't go to Chicago and get on the 'L' Train with the coronavirus."
- Protests, riots, and curfews won't last much longer – until the next media story

SUMMER OF PROCRASTINATION AND SOFT PLANS

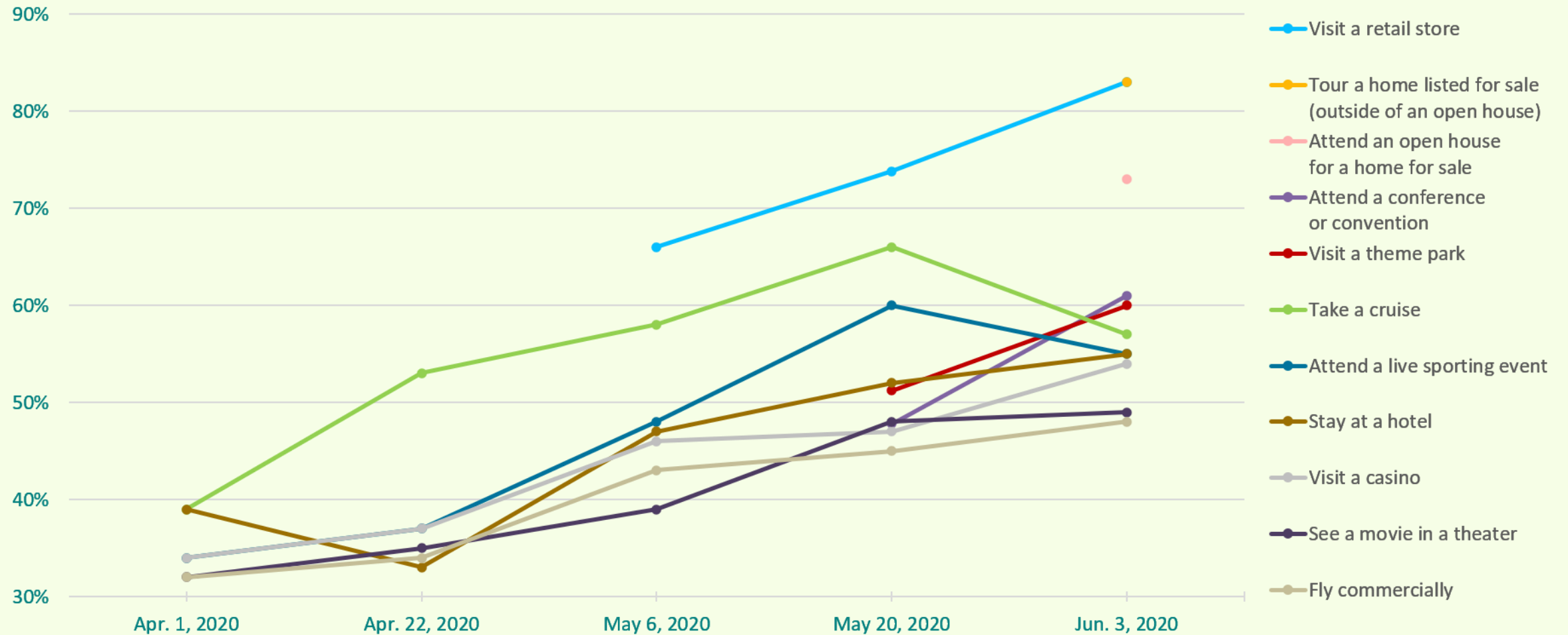
- Summer travel plans remain tentative
- Some booking travel based on probability, but not counting on it

“Where we go [this summer] will depend on if we're allowed to travel outside the country... If we have to travel within the United States, then [unrest] will have some impact on where we go.”

READINESS TO RETURN

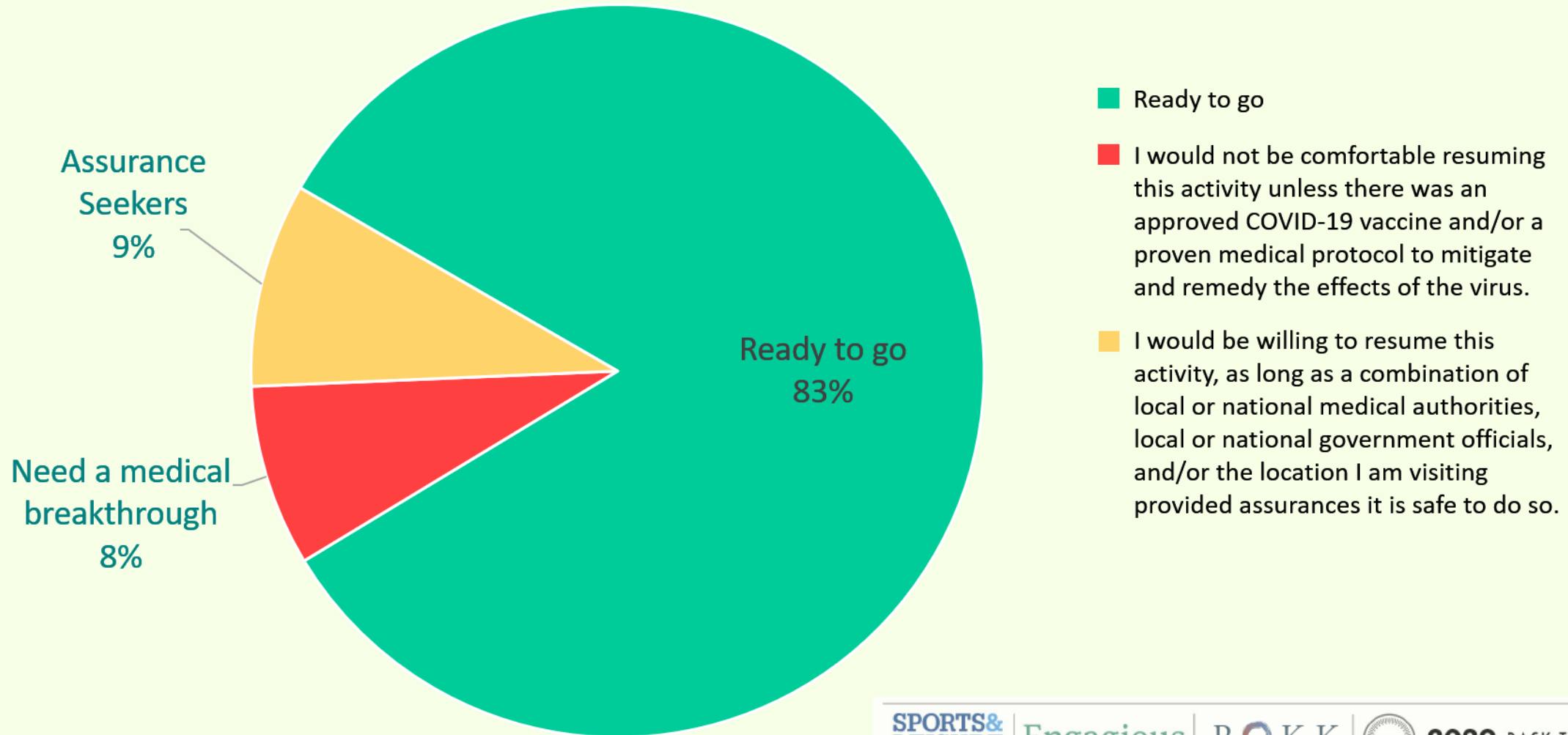
SIZABLE % WOULD RETURN TOMORROW

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



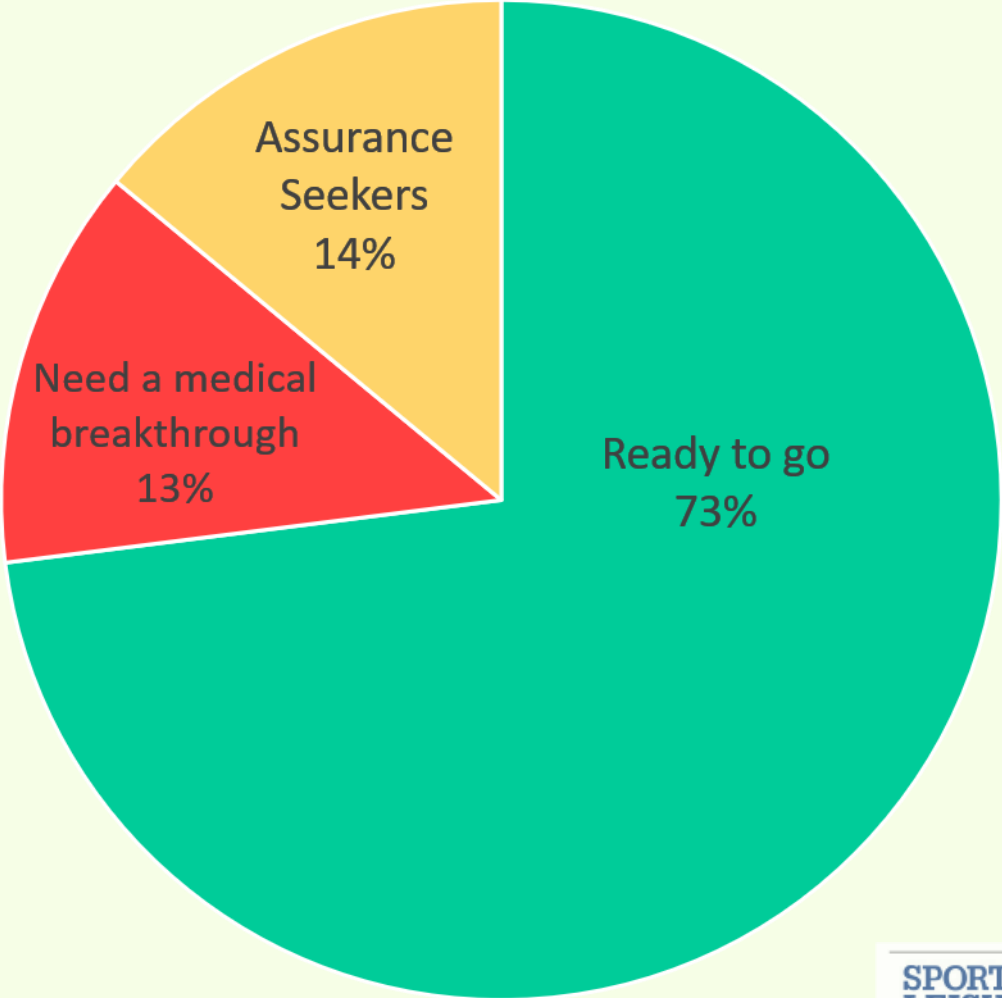
READY OR NOT: TOUR A HOME LISTED FOR SALE (OUTSIDE OF AN OPEN HOUSE)

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



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

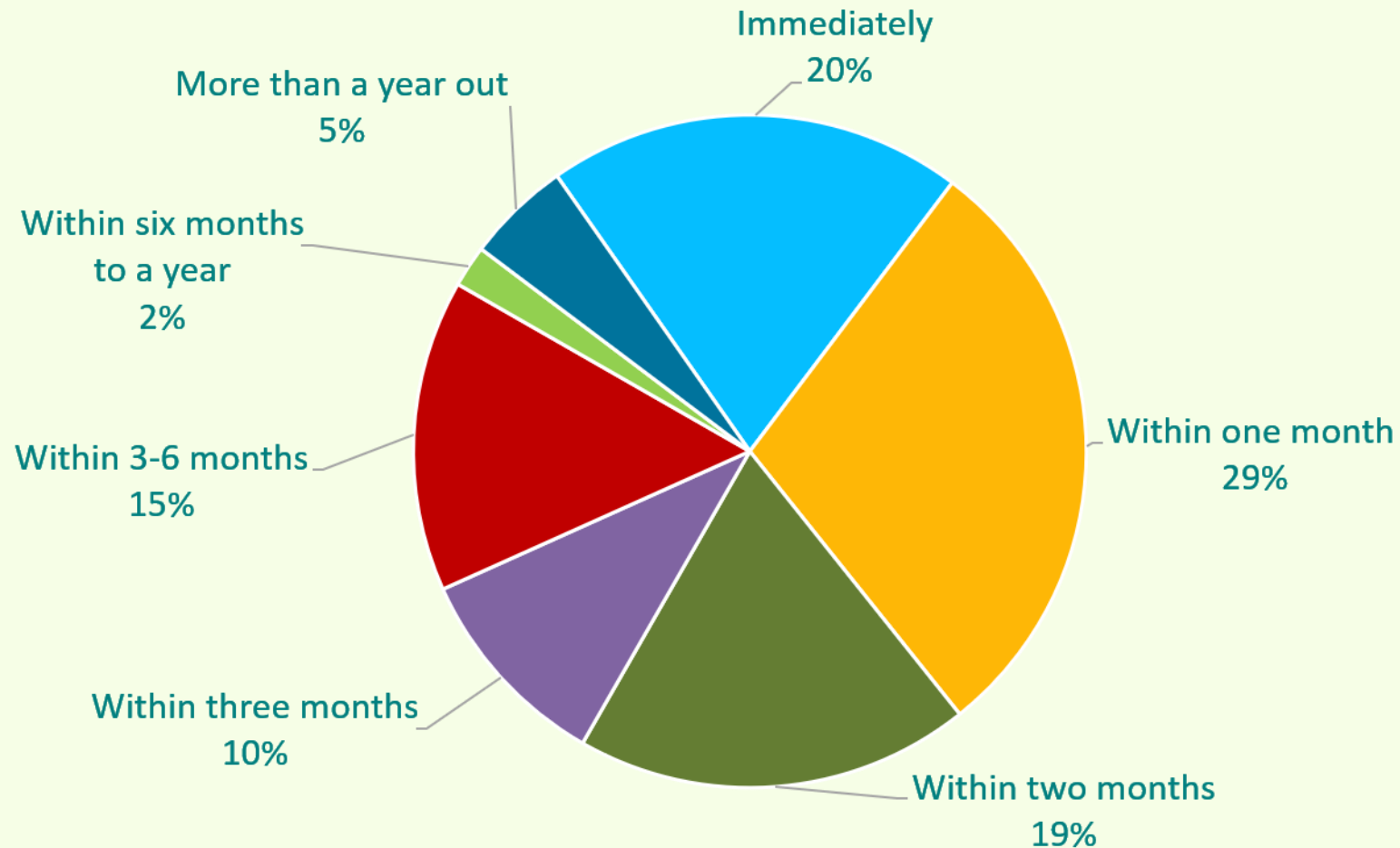
Which of the following conditions is closest to your current point of view... Attend an open house for a home for sale



- 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.

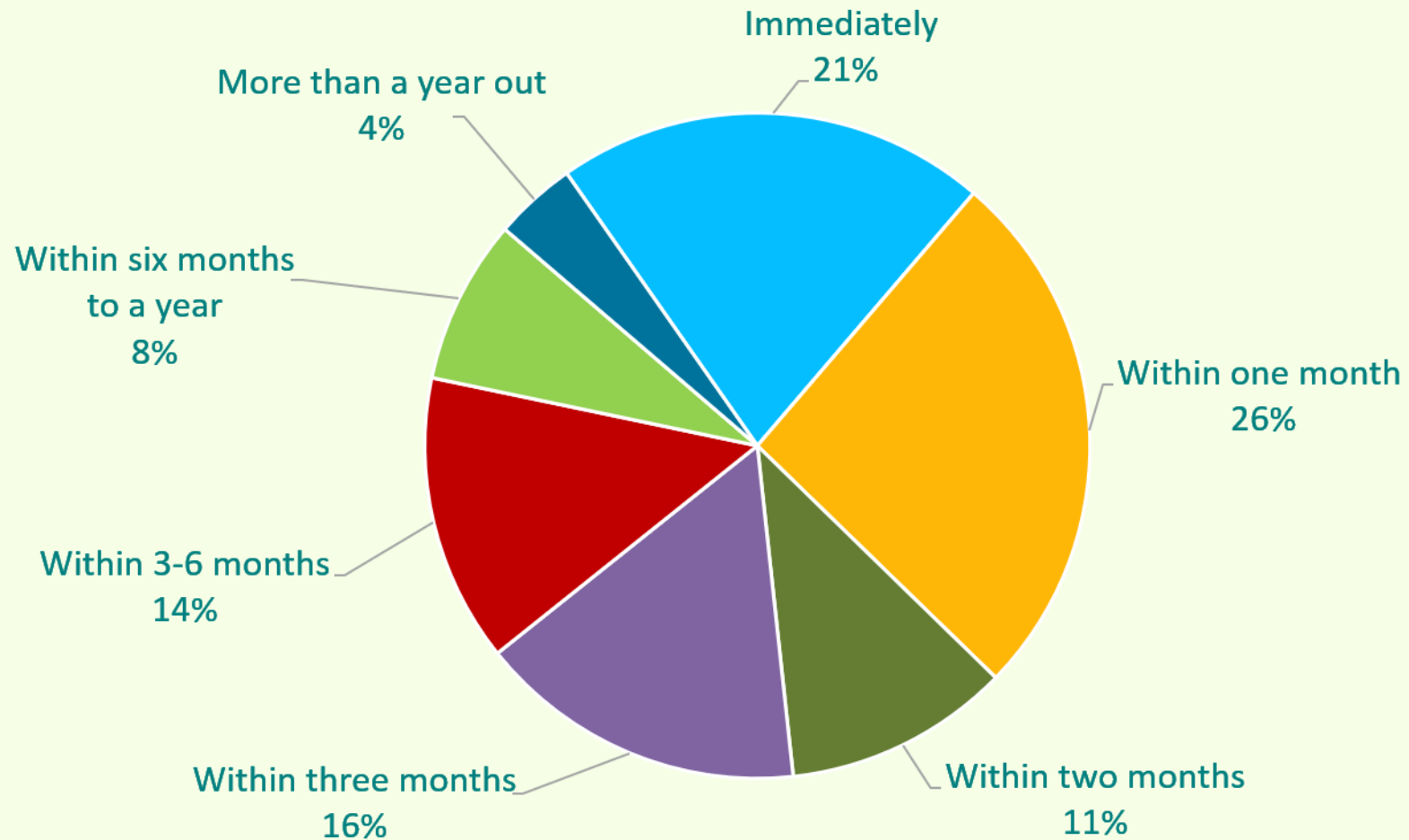
WITH ASSURANCES, 78% RETURN IN 3 MONTHS

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)



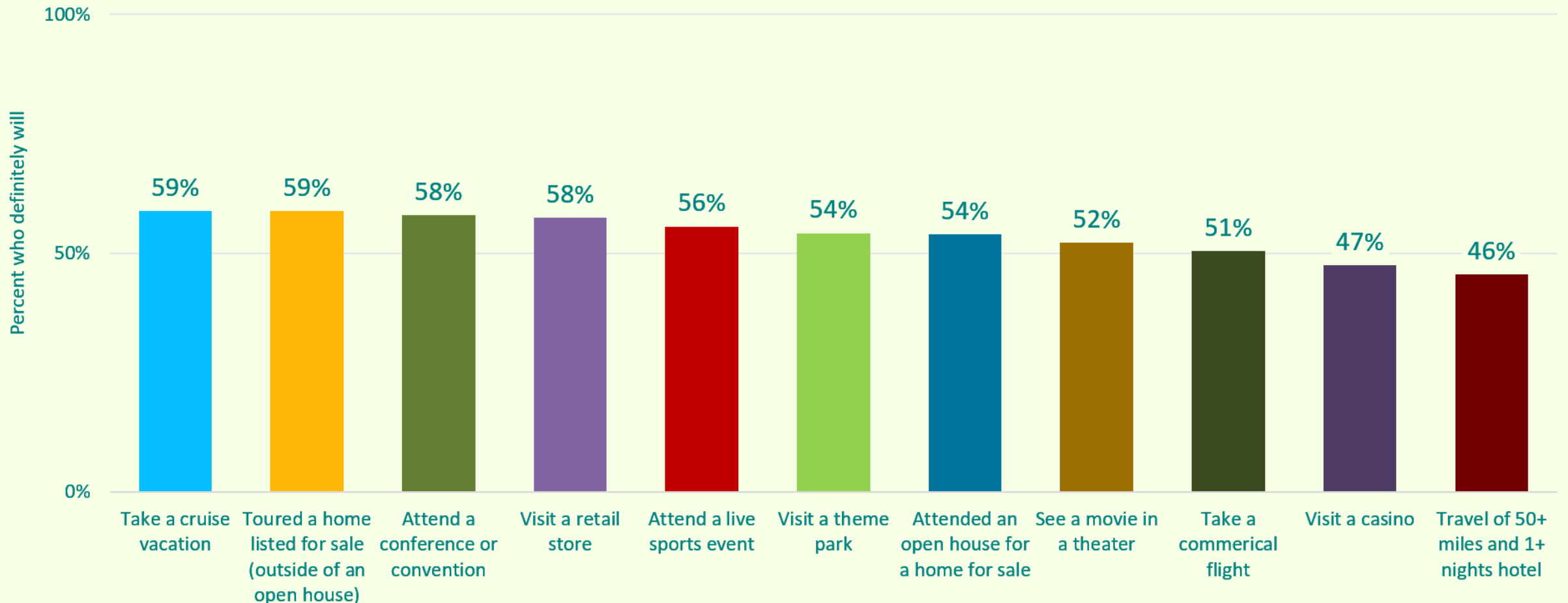
WITH ASSURANCES, 74% RETURN IN 3 MONTHS

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 for sale



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

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?

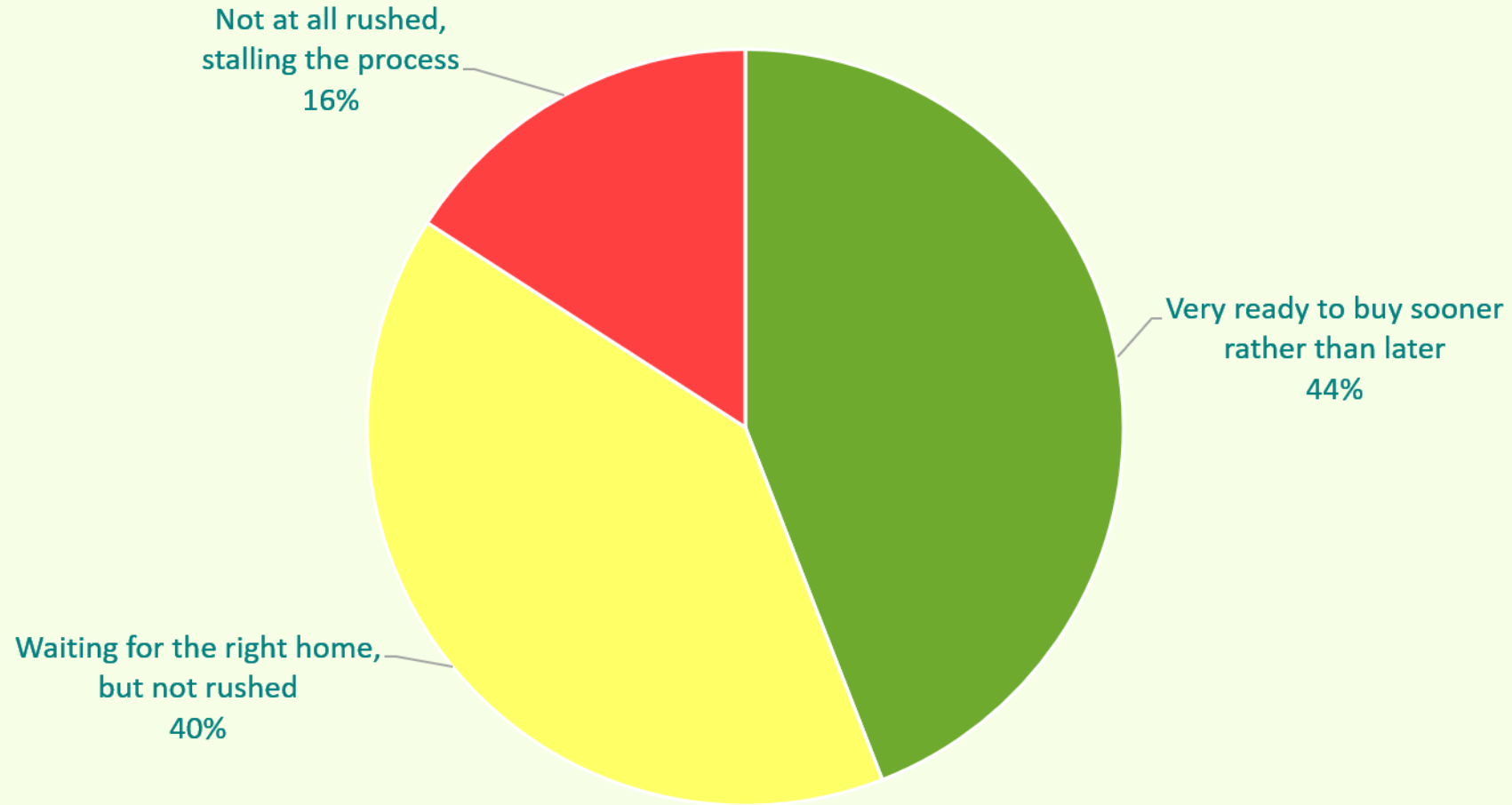


NAR



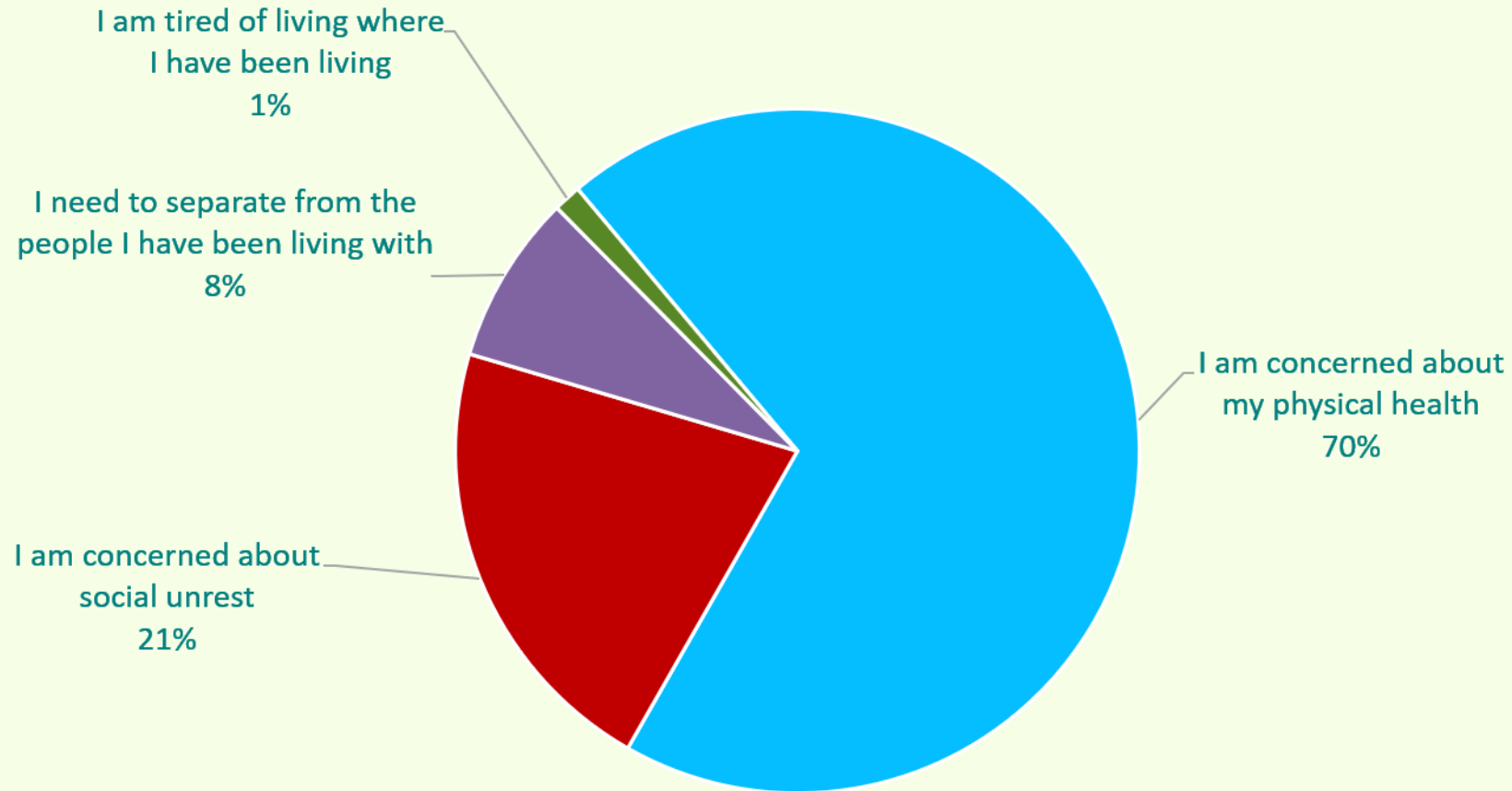
PLURALITY OF BUYERS VERY READY TO BUY

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



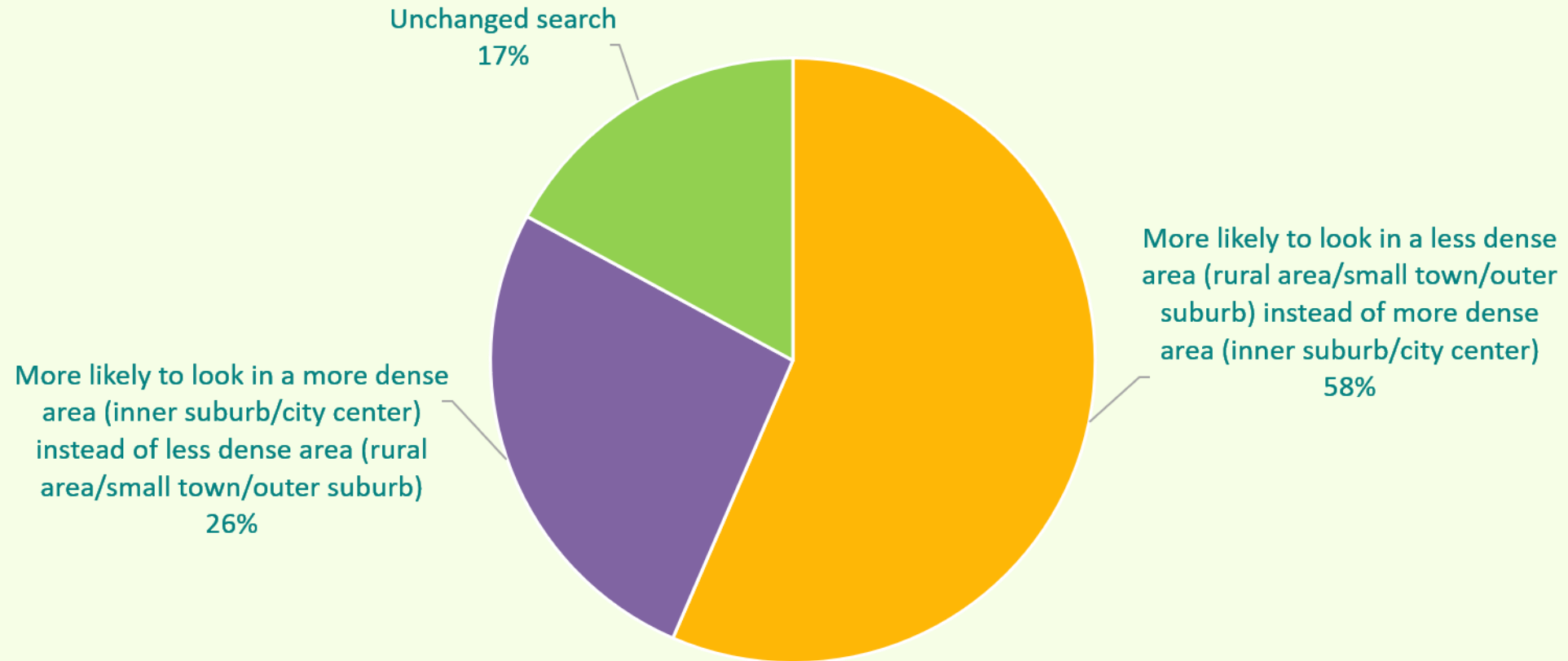
HEALTH CONCERNS ANIMATE BUYING

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



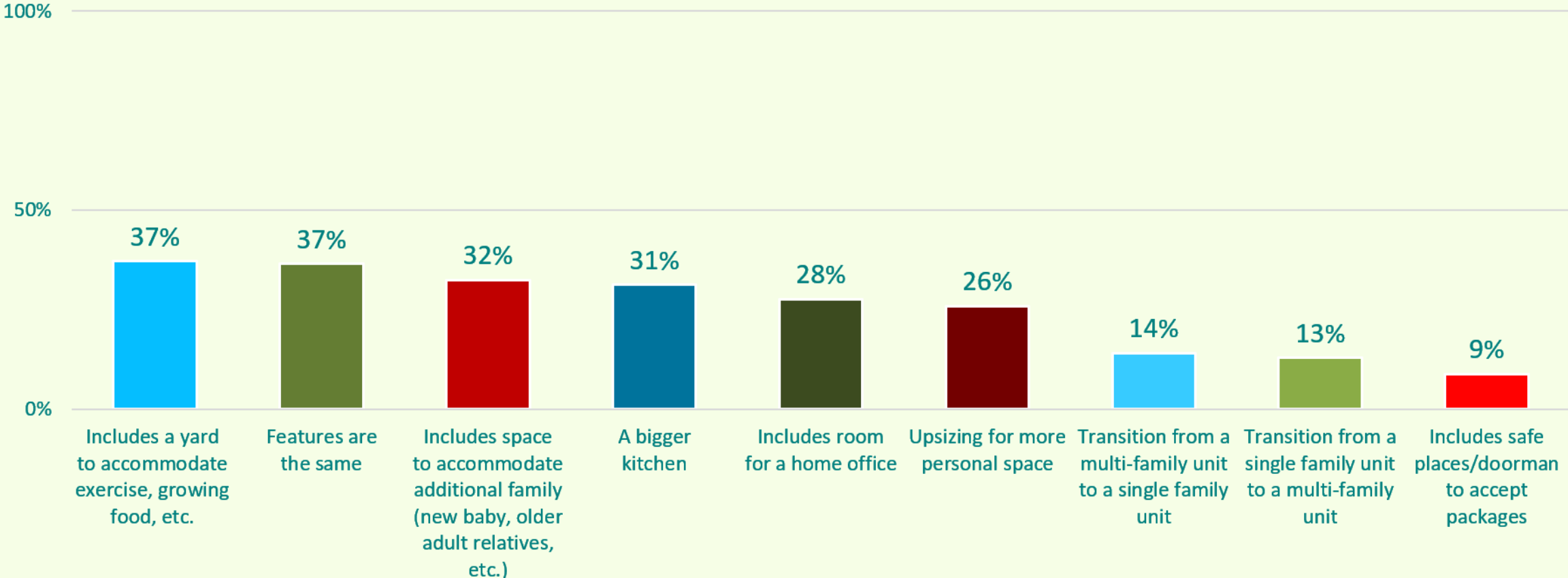
LOOKING FOR HOMES IN LESS DENSE AREAS

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



LOOKING FOR MORE SPACE

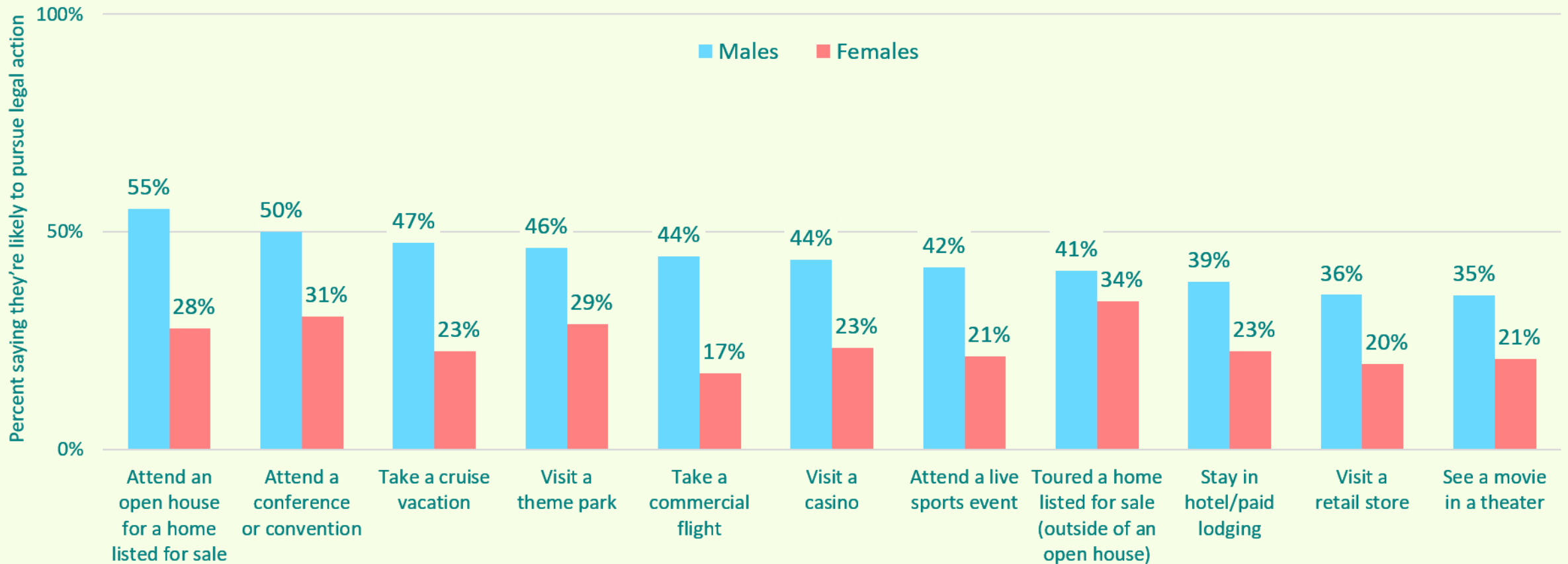
As you re-enter the home buying market, which of the following home features may be important to you that were not important prior to the pandemic?



Suing vendors & employers

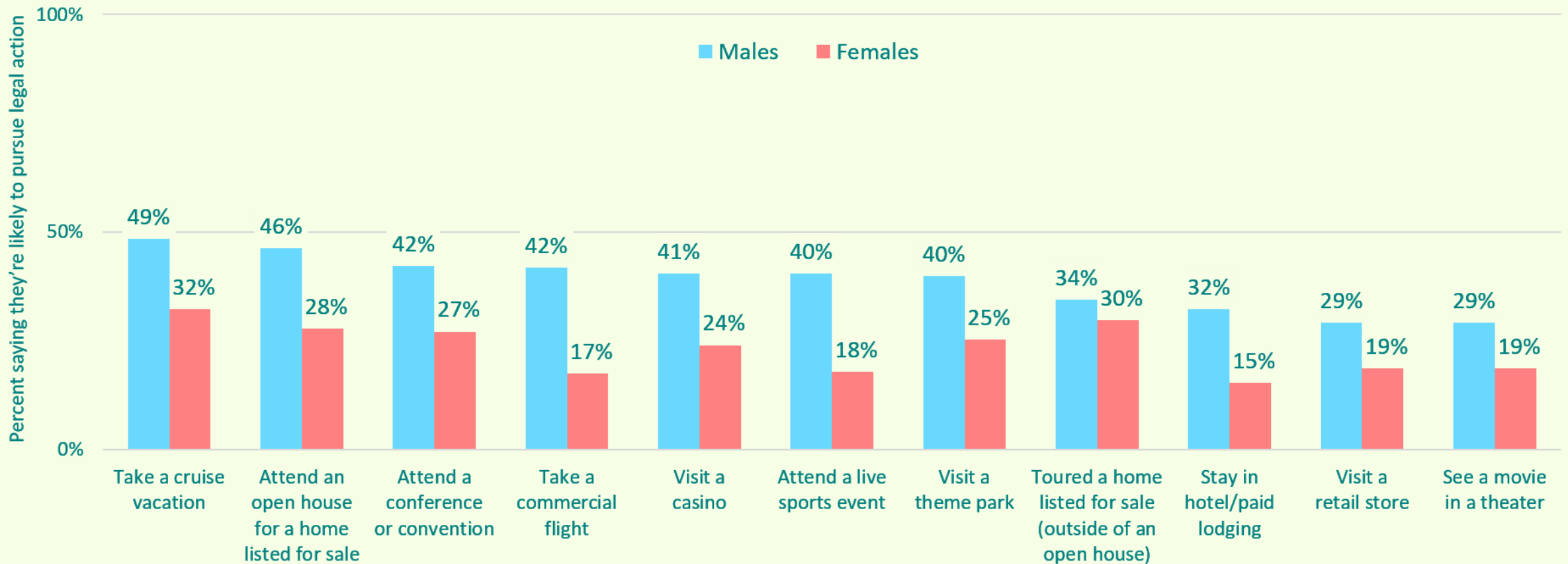
EVERY SECTOR VULNERABLE TO LAWSUITS

Imagine you returned to some of your favorite activities and had assurance from the property or provider that CDC guidelines were being followed for a safe and sanitary environment. One week later you found out that someone who was present when you were had COVID-19. A few days later you came down with the illness yourself. On a scale from 1 to 10, how likely would you be to pursue legal action against the property or provider?



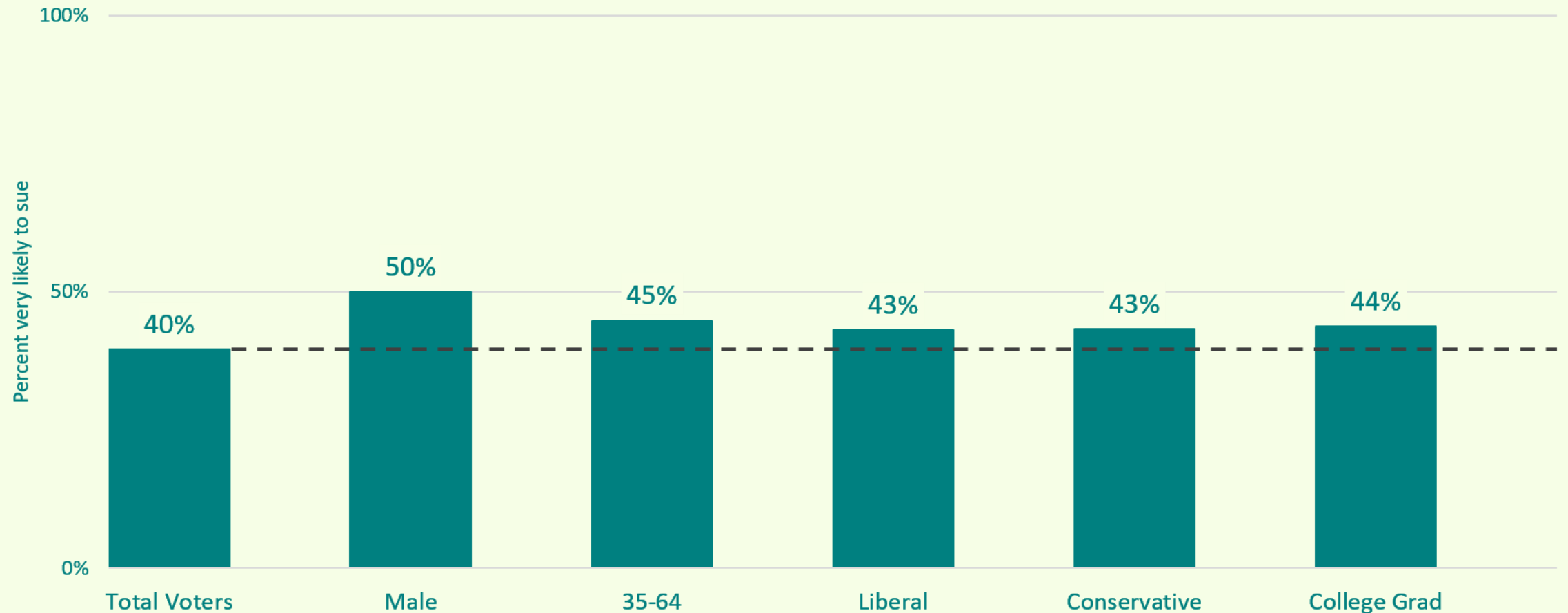
...EVEN AFTER CUSTOMERS SIGN A RELEASE

Imagine the same scenario as above, but the only difference is that you signed a release before engaging in that activity, holding the property or provider harmless if you came down with COVID-19. In that situation, on a scale from 1 to 10, how likely would you be to pursue legal action against the property or provider?



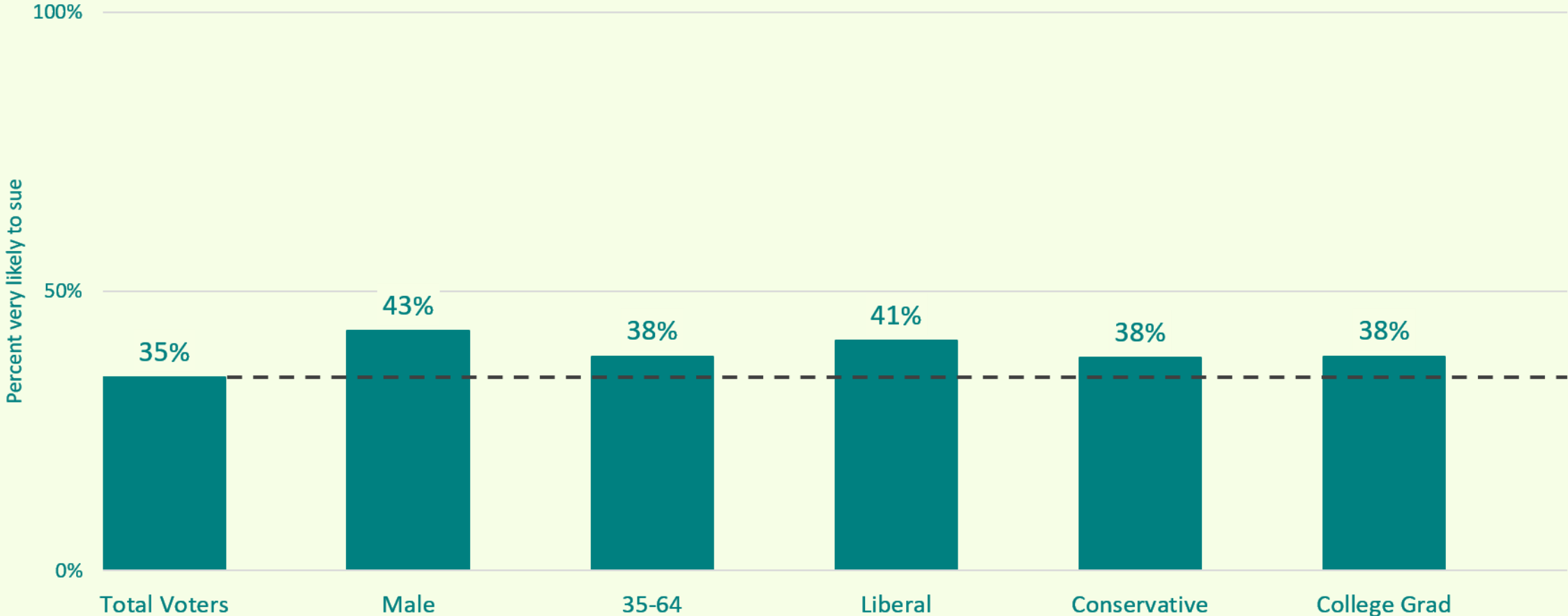
EMPLOYEES WILLING TO SUE THEIR EMPLOYERS

Imagine you returned to work on the first of the month, and on the seventh of the month you found out that one of the co-workers had COVID-19. A few days later you came down with the illness yourself. On a scale from 1 to 10, how likely would you be to pursue legal action against your employer?



ALSO WILLING TO SUE THEIR ATTENTIVE EMPLOYER

Imagine the same scenario as above, but you were confident your employer had closely followed every protocol to sanitize the premises, maintain social distancing, and require face masks. In that situation, on a scale from 1 to 10, how likely would you be to pursue legal action against your employer?



n=500, Back to Normal Barometer, June 3, 2020

ONE LAST THING TO CONSIDER: RESTROOMS

- Greatest concerns, beyond the usual
 - Small, confined space with heavy traffic
 - Many touchpoints: doors, handles, faucets, flushers, etc.
 - Variable frequency of cleaning
- Small measures reinforce a commitment to cleanliness
 - Clean and re-stock restrooms often, especially removing trash
 - Evidence that the restroom is taken care of
 - Base frequency on traffic, not time
 - Include hand sanitizer and paper towels in bathrooms
 - Automate door entry, water/soap dispensing, etc.
 - Good maintenance supports cleanliness
 - Clean, disinfecting scent

QUESTIONS

- What questions do you have for us?
- What should we ask in wave 6?

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