

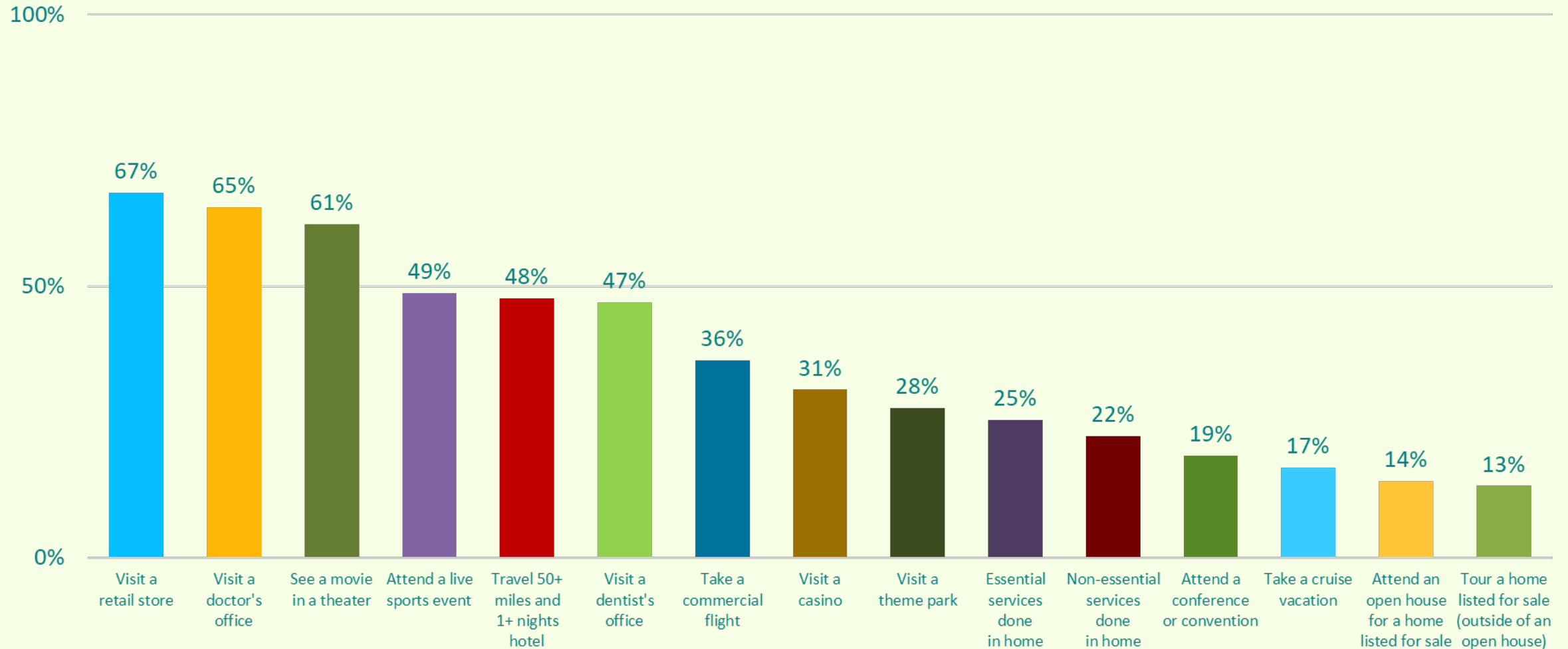
MANEUVERING AROUND UNCERTAINTY

Public opinion insights from the July 8, 2020 “Back-to-Normal Barometer”

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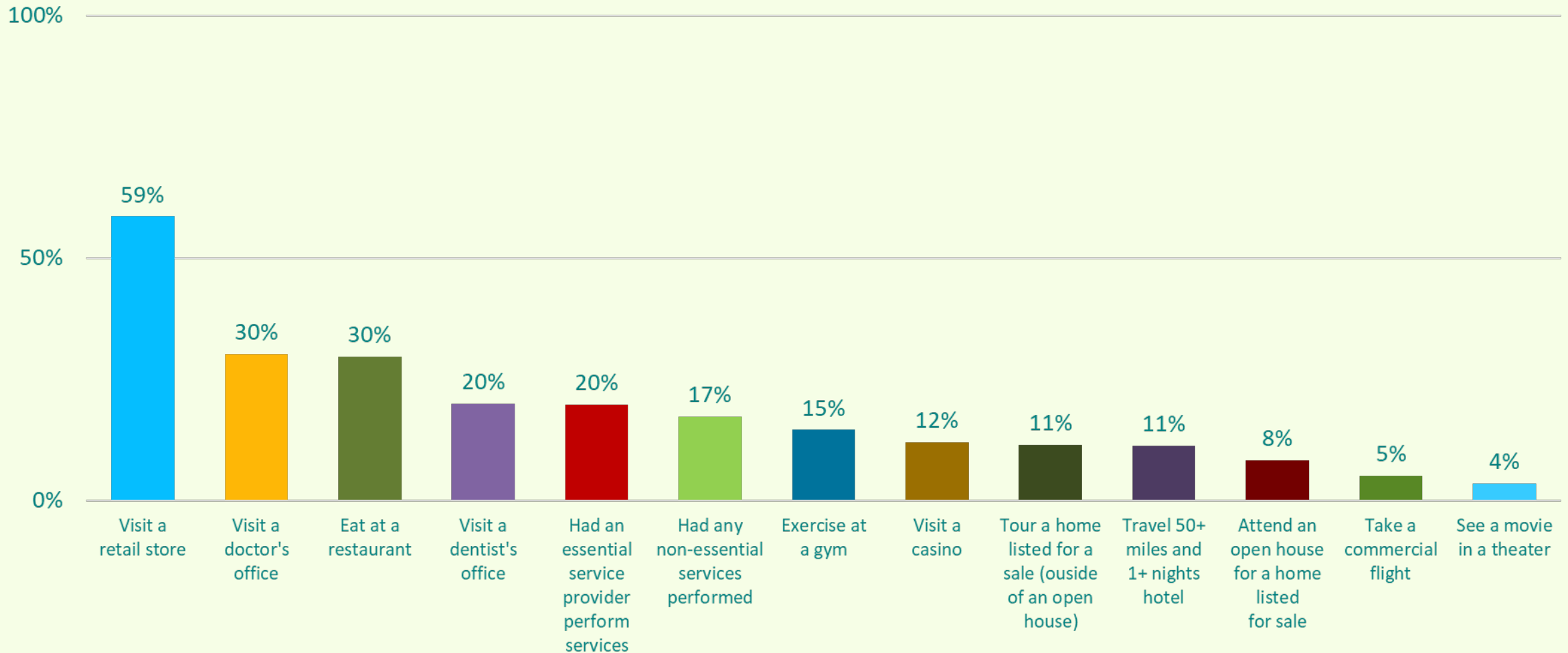
CONTEXT: RESPONDENTS ACTIVELY ENGAGE

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

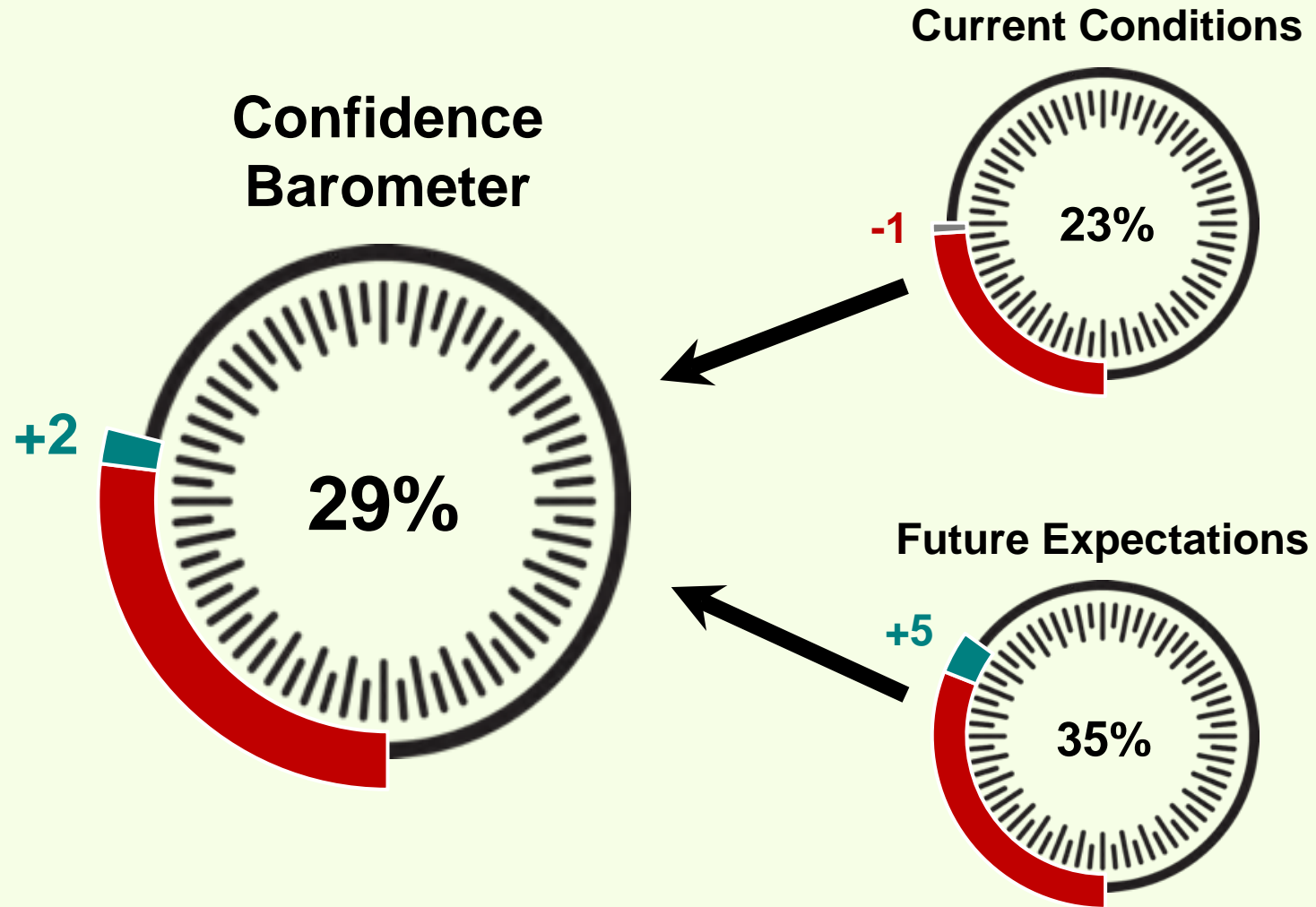


GROWING NUMBERS ENGAGED IN PAST MONTH

Percent who have participated in this activity in the past month



FUTURE EXPECTATIONS FUEL MODEST CONFIDENCE UPTICK



Wave 7: n=598, Back to Normal Barometer – July 8, 2020
Wave 6: n=565, Back to Normal Barometer – June 17, 2020

FUTURE EXPECTATIONS FUEL MODEST CONFIDENCE UPTICK

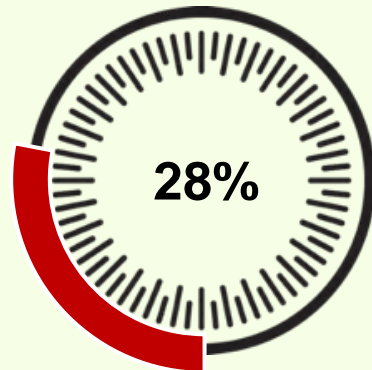
There are no significant differences in confidence between the “COVID-19 Heavy” states versus “COVID-19 Light” states.

Confidence Barometer

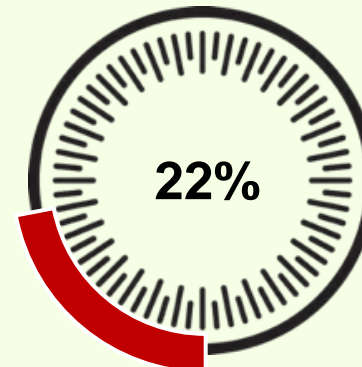
Current Conditions

Future Expectations

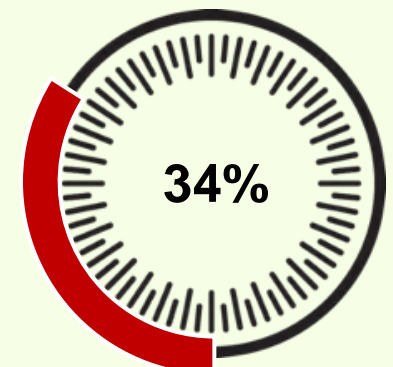
COVID-19 Heavy



28%

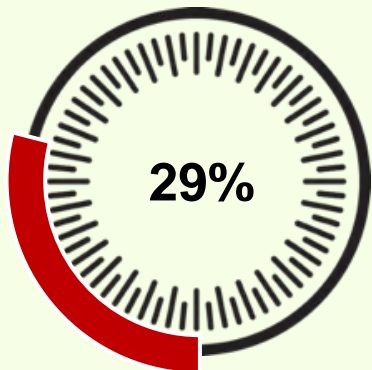


22%

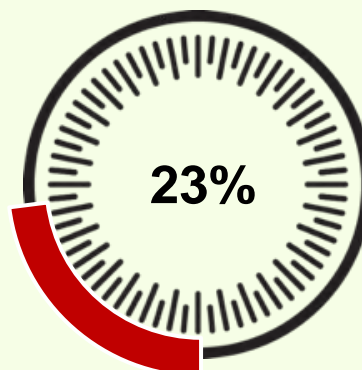


34%

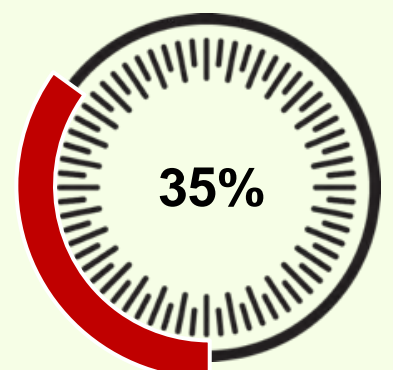
COVID-19 Light



29%

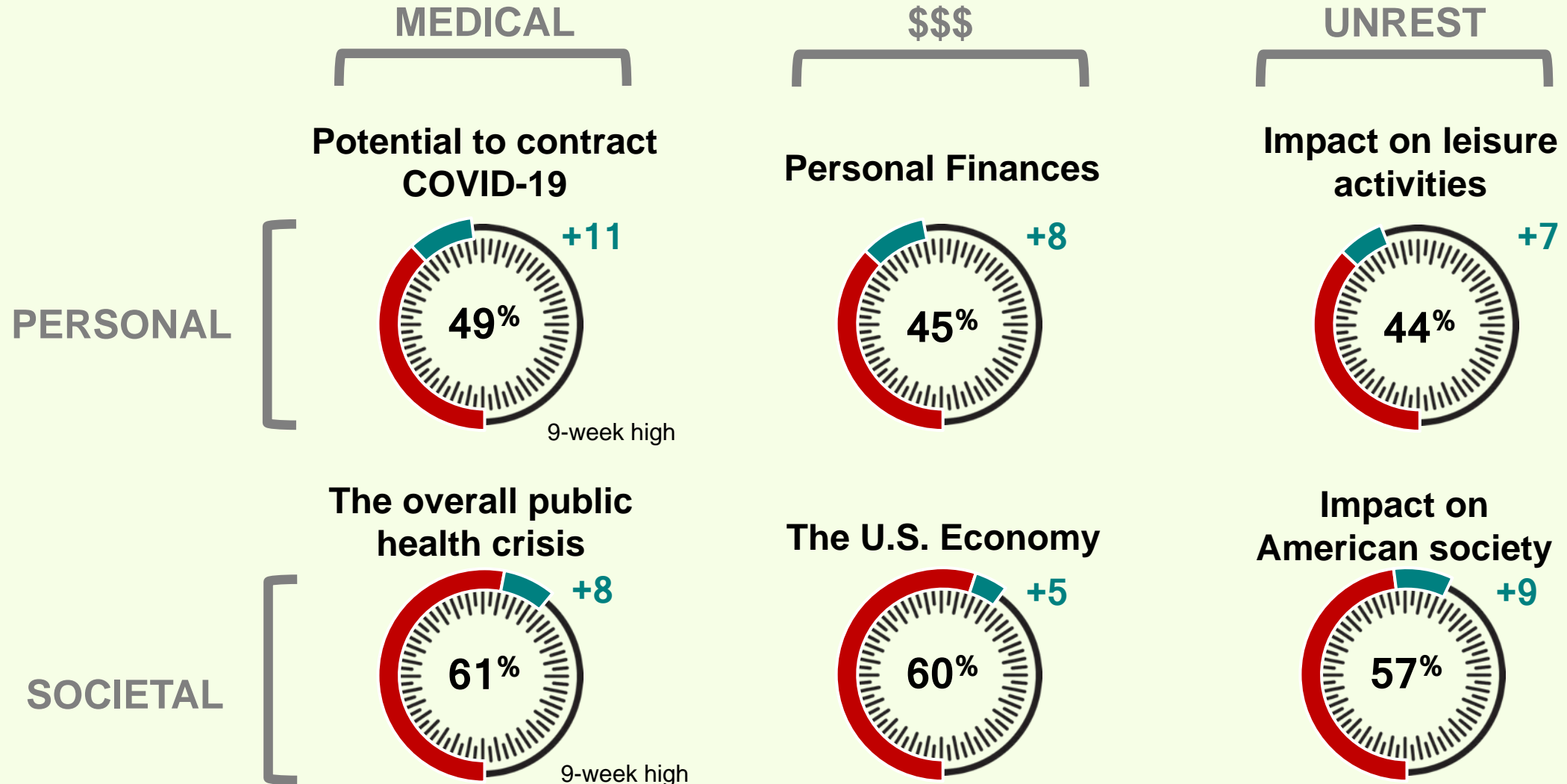


23%



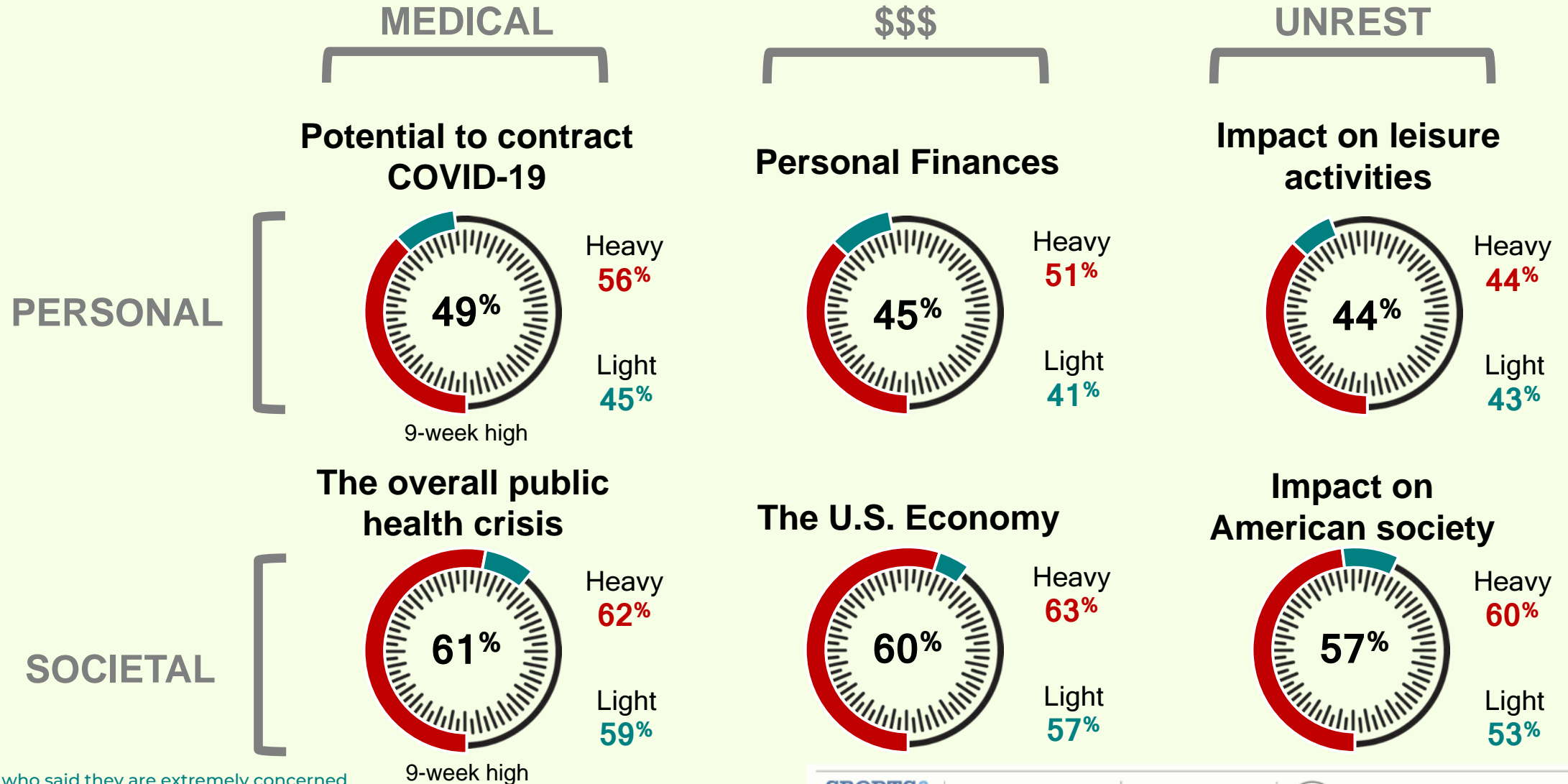
35%

SOCIETAL CONCERNS STILL DOMINATE



*Percentage who said they are extremely concerned
 Wave 7: n=598, Back to Normal Barometer, July 8, 2020
 Wave 6: n=565 Back to Normal Barometer – June 17, 2020

COVID-HEAVY AREAS ARE EVEN MORE CONCERNED

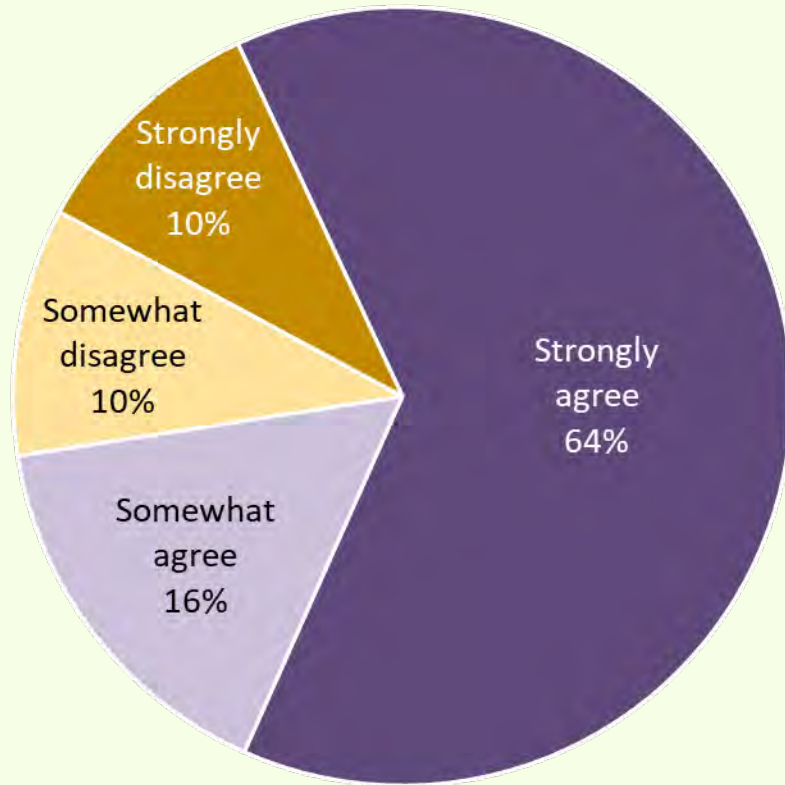


*Percentage who said they are extremely concerned
 Wave 7: n=598, Back to Normal Barometer, July 8, 2020
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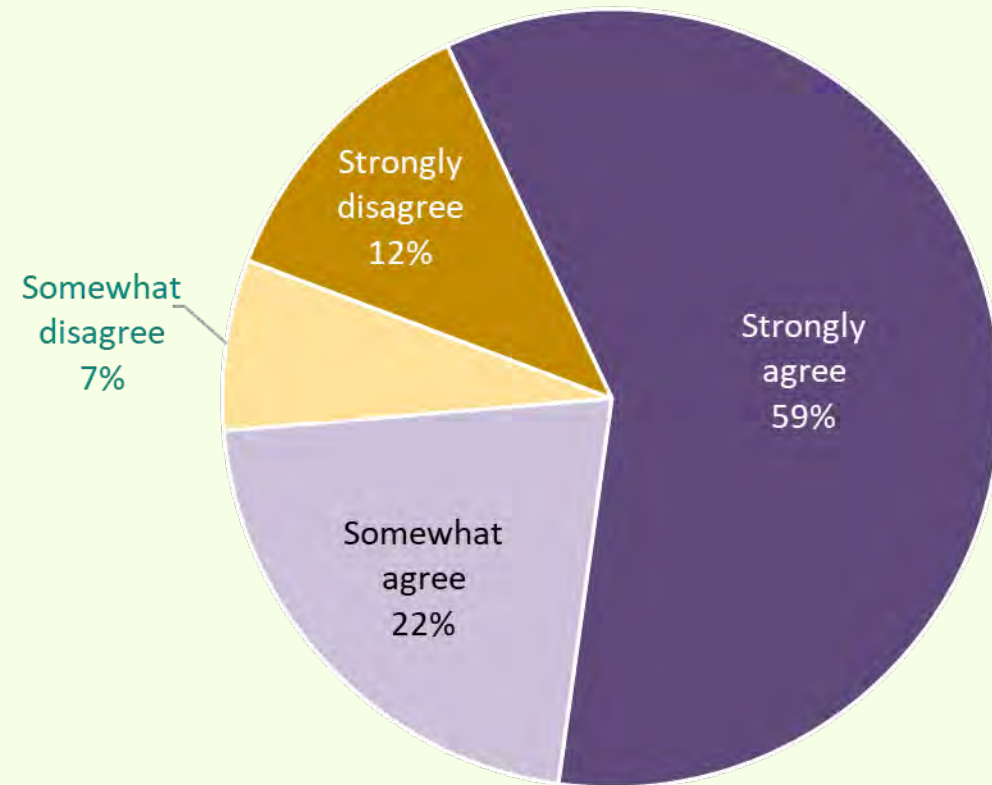
THEY'RE WORRIED ABOUT A SECOND WAVE...

I'm concerned that there will be a second wave of COVID-19 outbreak, requiring event cancellations and lockdowns this fall.

COVID-Heavy States



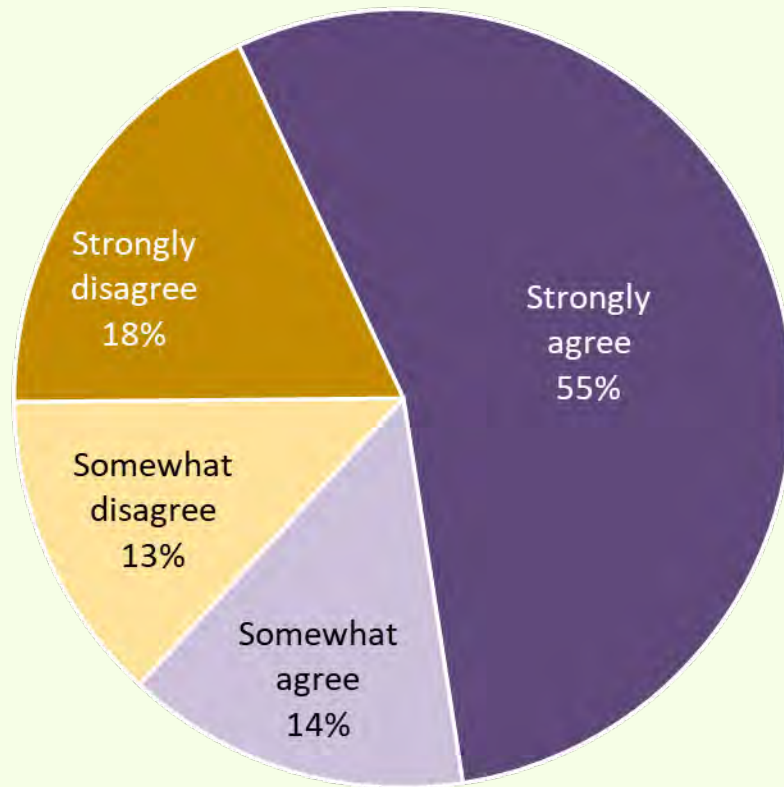
COVID-Light States



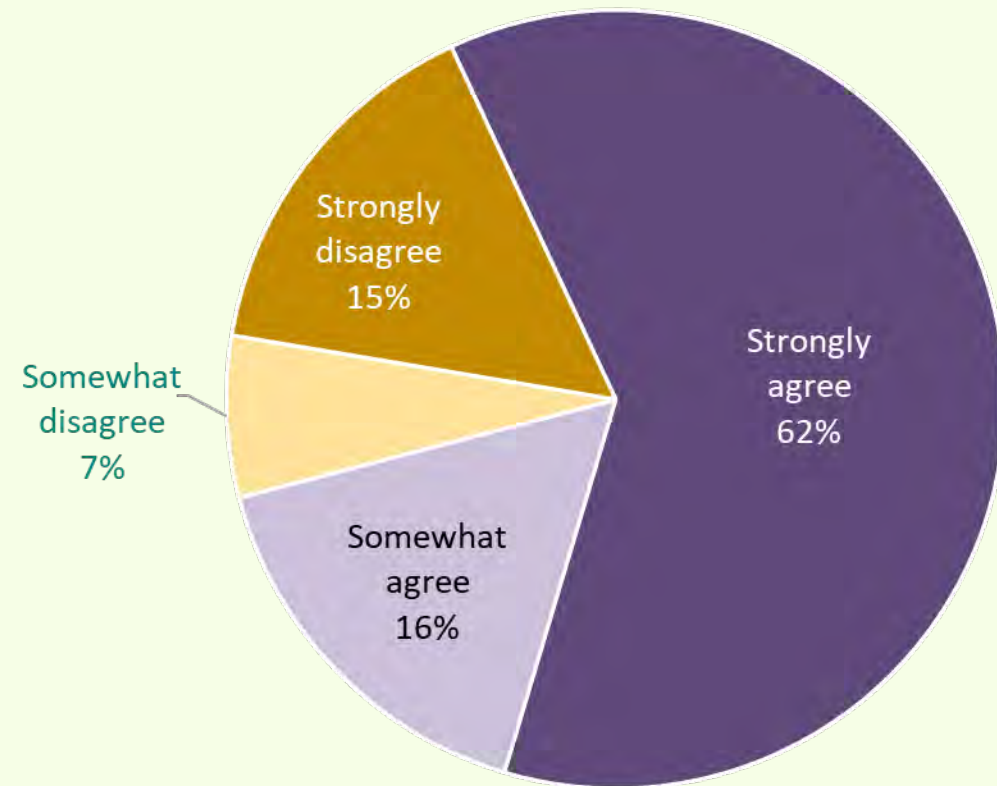
...AND IT'S UNDERMINING THEIR WILLINGNESS TO TRAVEL

The possibility of a second wave of COVID-19 cases is affecting my willingness to travel in coming months.

COVID-Heavy States



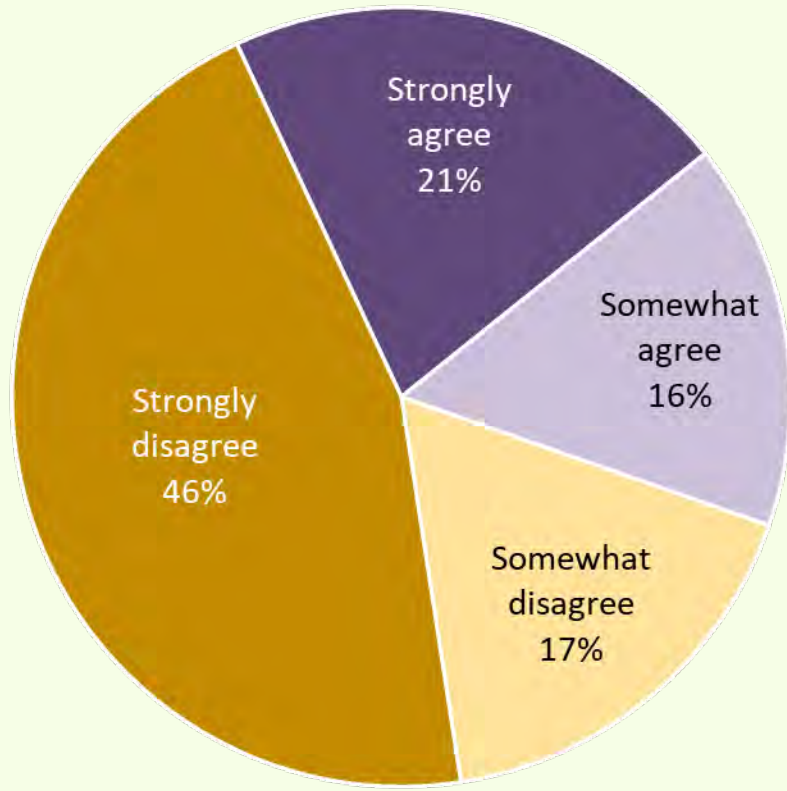
COVID-Light States



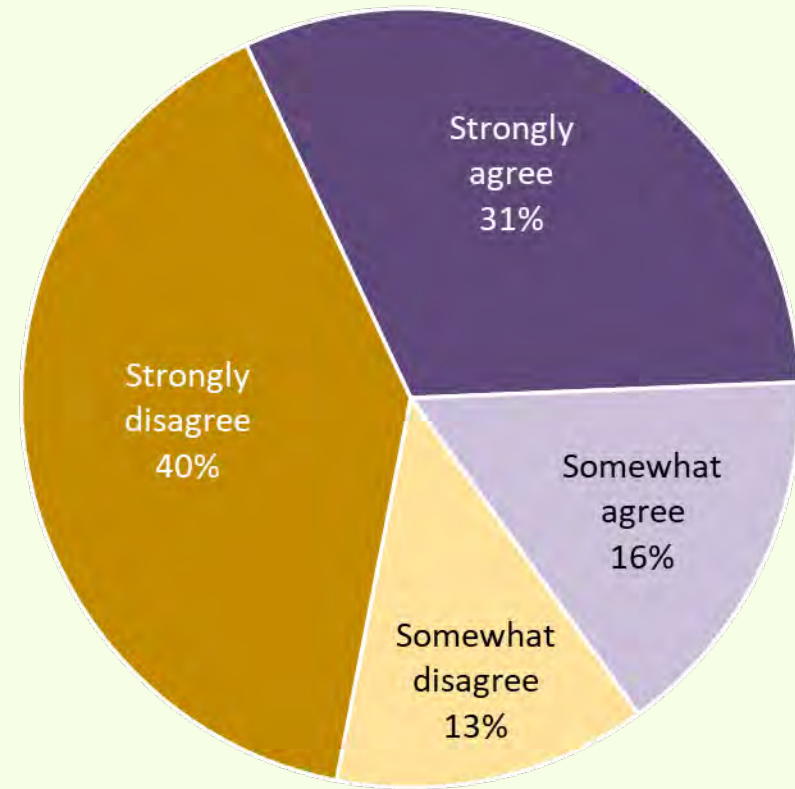
THEY'RE WORRIED ABOUT LOSING THEIR JOB

I'm concerned about losing my job or being furloughed.

Wave 6



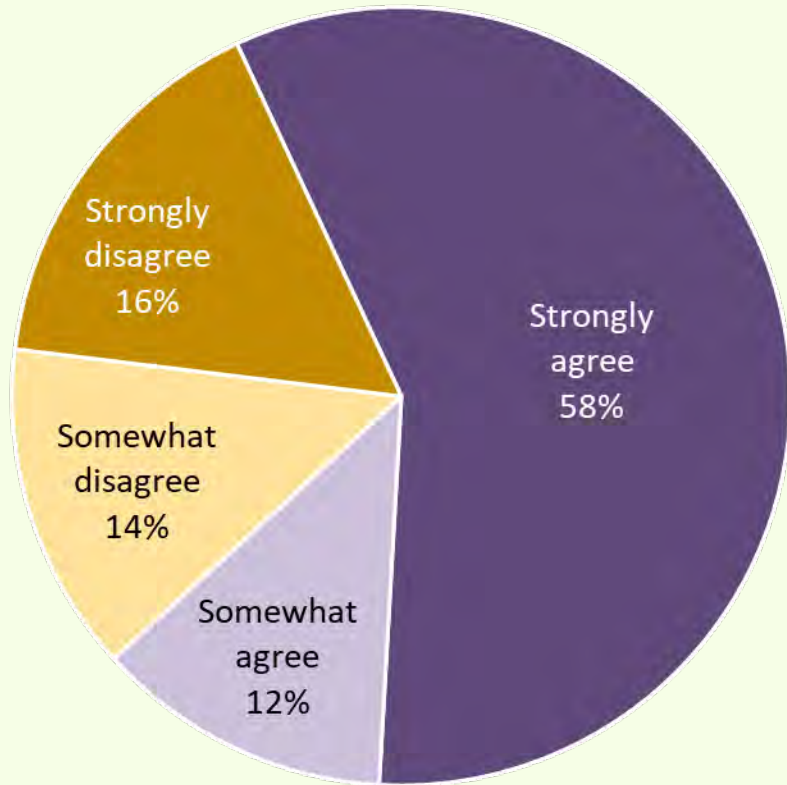
Wave 7



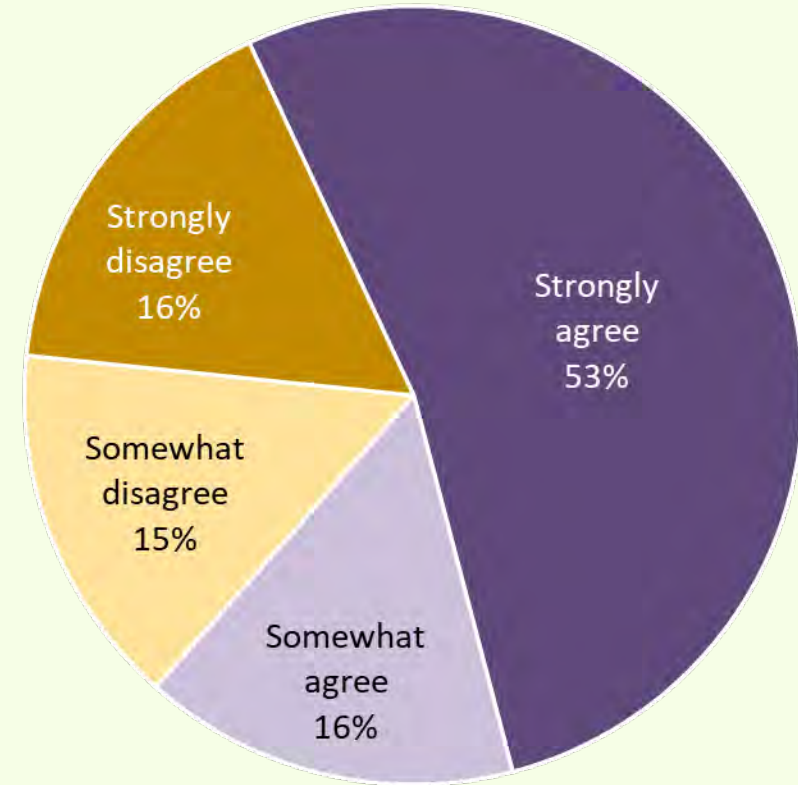
THEY'RE WORRIED WE'RE REOPENING TOO QUICKLY

I'm concerned that we are moving too quickly in opening up businesses in the U.S.

COVID-Heavy States



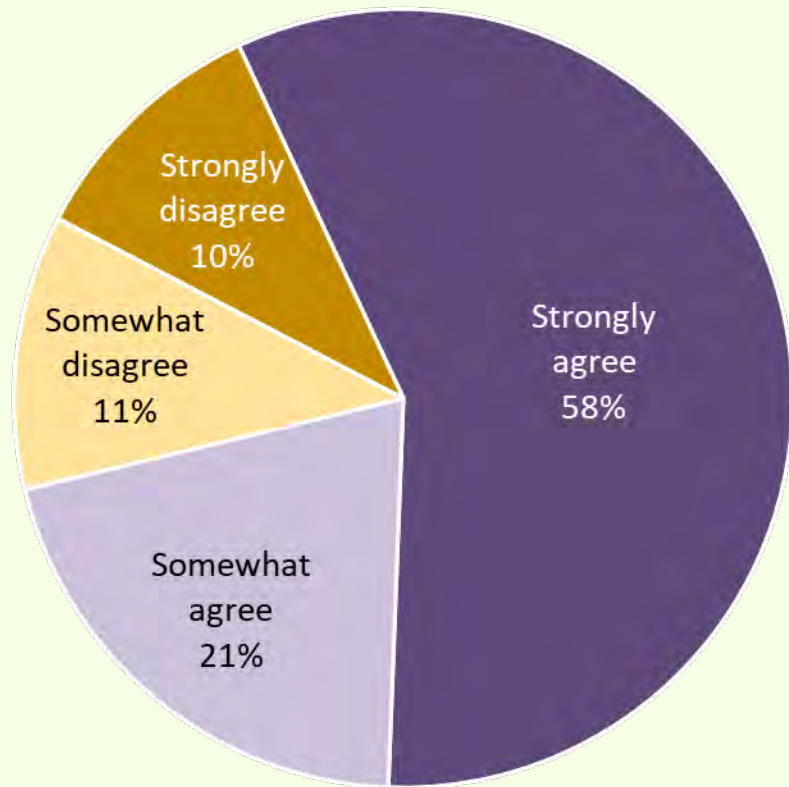
COVID-Light States



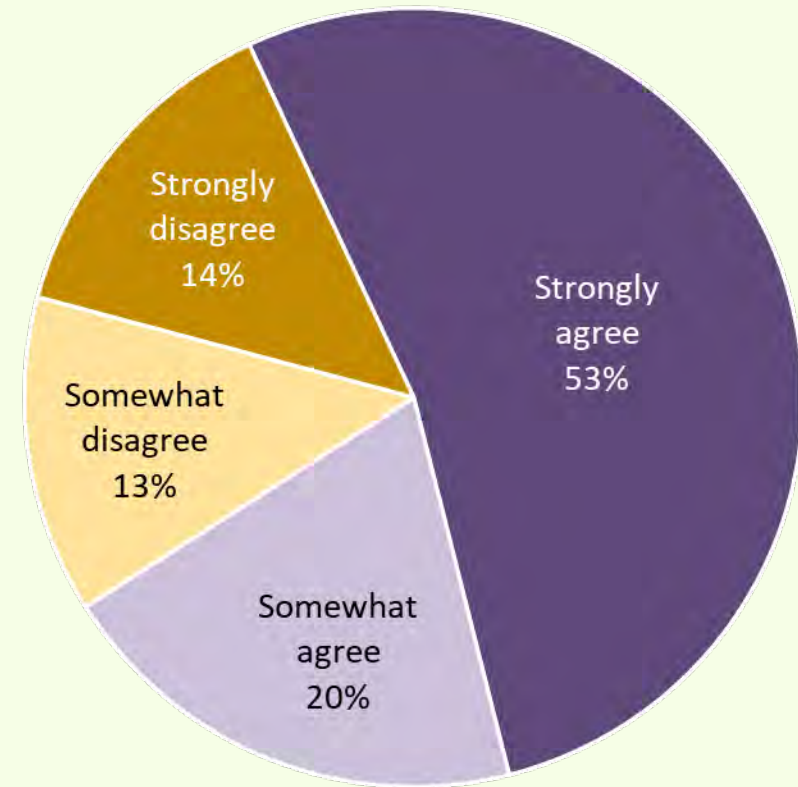
AND THEY'RE WORRIED THEY'RE NOT GETTING CLEAR GUIDANCE

When it comes to avoiding COVID-19, I feel like I'm getting mixed messages from people in the...

Government



Media



AMIDST WORRY, YOU NEED TO HAVE THEIR BACKS

- Wisdom, certainty, and trust are in short supply
- Americans don't believe others are being as diligent in their adherence to safety protocols as they are
- In the absence of clear guidance, one's confidence to re-engage is tied to an ability to control the health risk of a given experience
- Your challenge: Can **you** enhance the semblance of personal control?
Can **you** provide the certainty people crave?
 - Message: "You don't have to worry about others' behavior; we've got you covered."

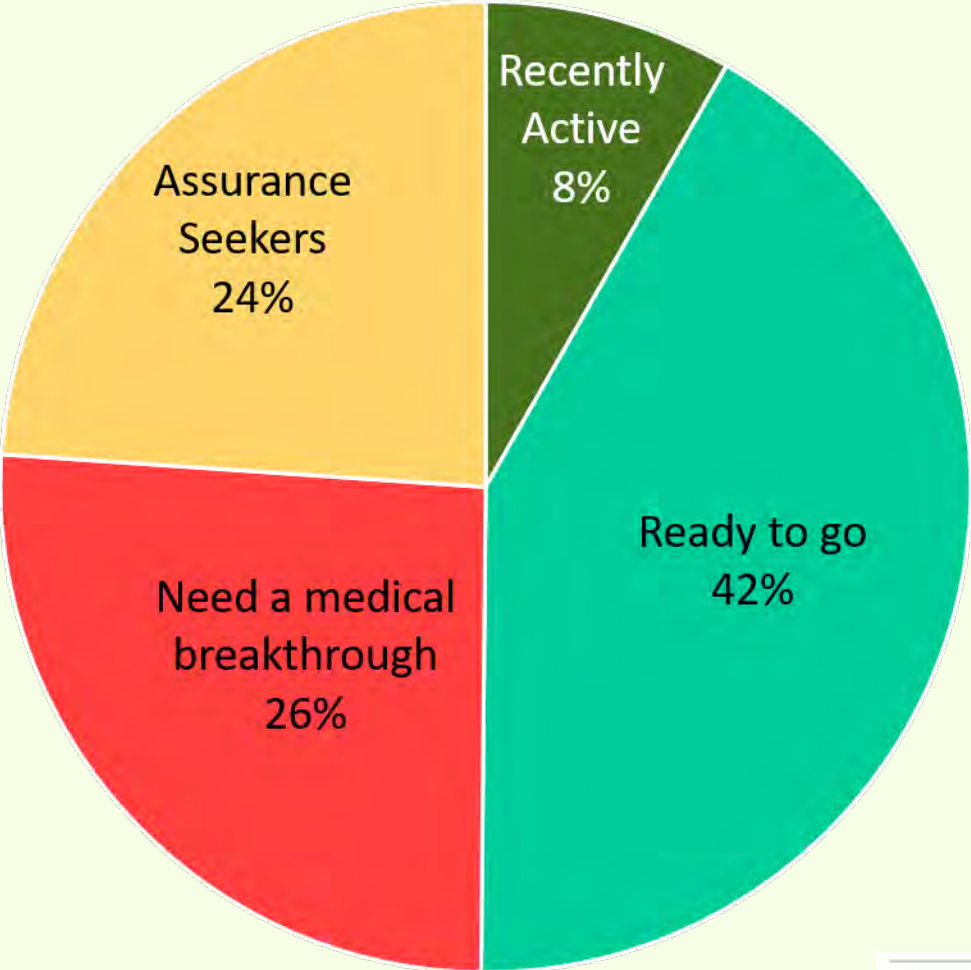
EXAMPLE OF GIVING CERTAINTY & GETTING IT RIGHT

“At the hotel, they did the extra guidelines and took the effort to have extra cleaning, make sure [there was] spacing. The staff and everyone was wearing masks. It had a pool [at] the place that we stayed, and they had it set up that you would schedule your time there. That way people weren’t interacting too much. It’s kind of what I was expecting that they would do in a case like that. [Their attitude was,] ‘We’re going to try and stay open, but we’re going to follow the guidelines how we’re supposed to.’ It was a great experience overall.” – Nick (Male, age 36, California)

Residential real estate sector

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

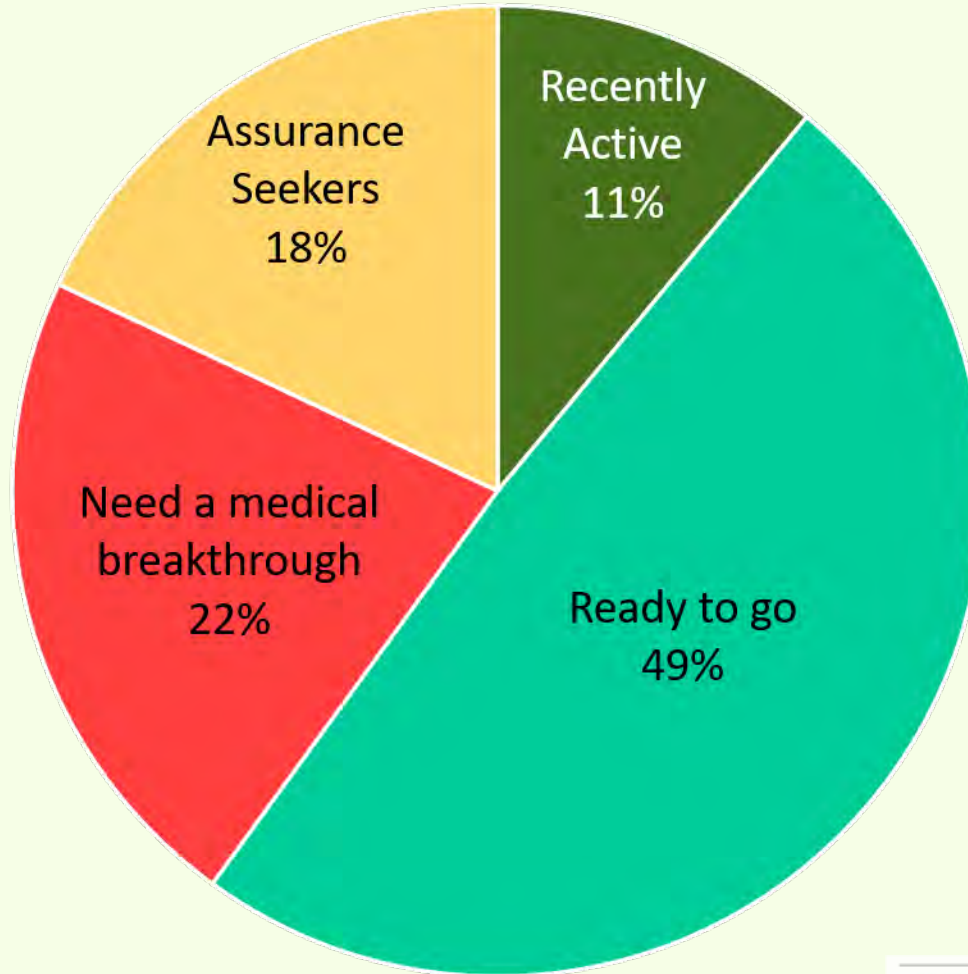
Which of the following conditions is closest to your current point of view... Attend an open house for a home listed for sale



- 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)

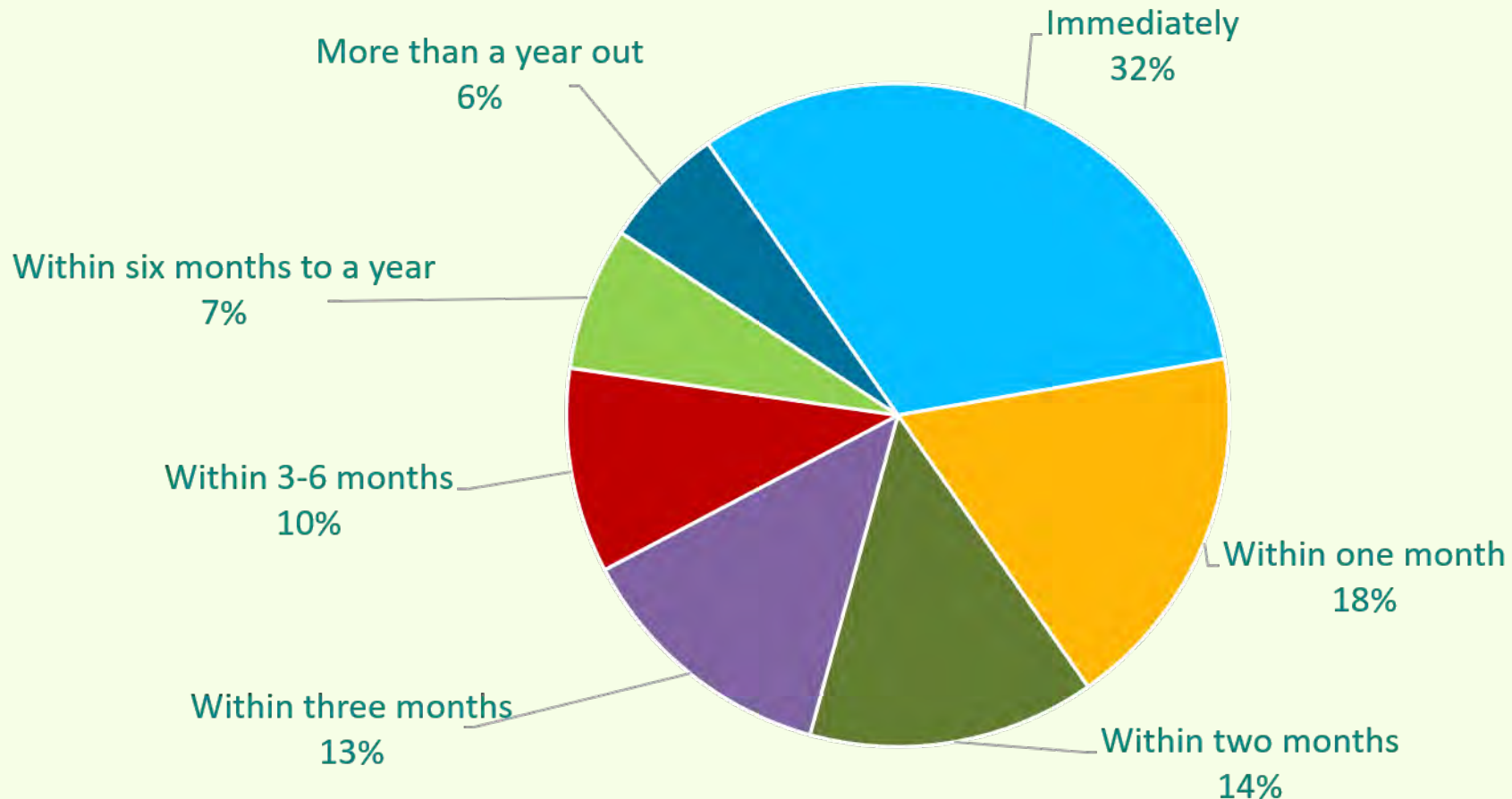
Which of the following conditions is closest to your current point of view... Tour a home listed for sale (outside of an open house)



- 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.

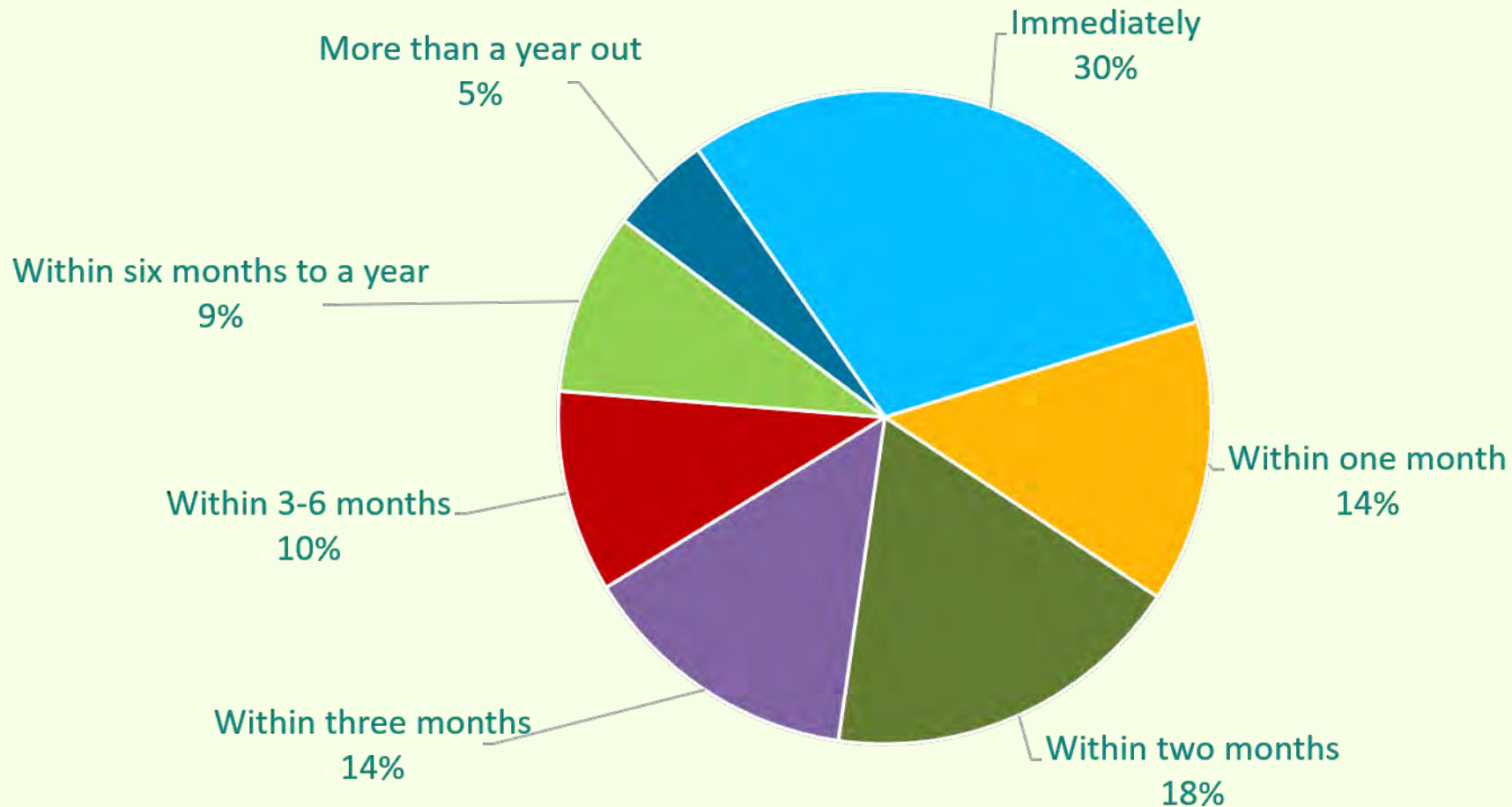
WITH ASSURANCES, 77% RETURN IN 3 MONTHS

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



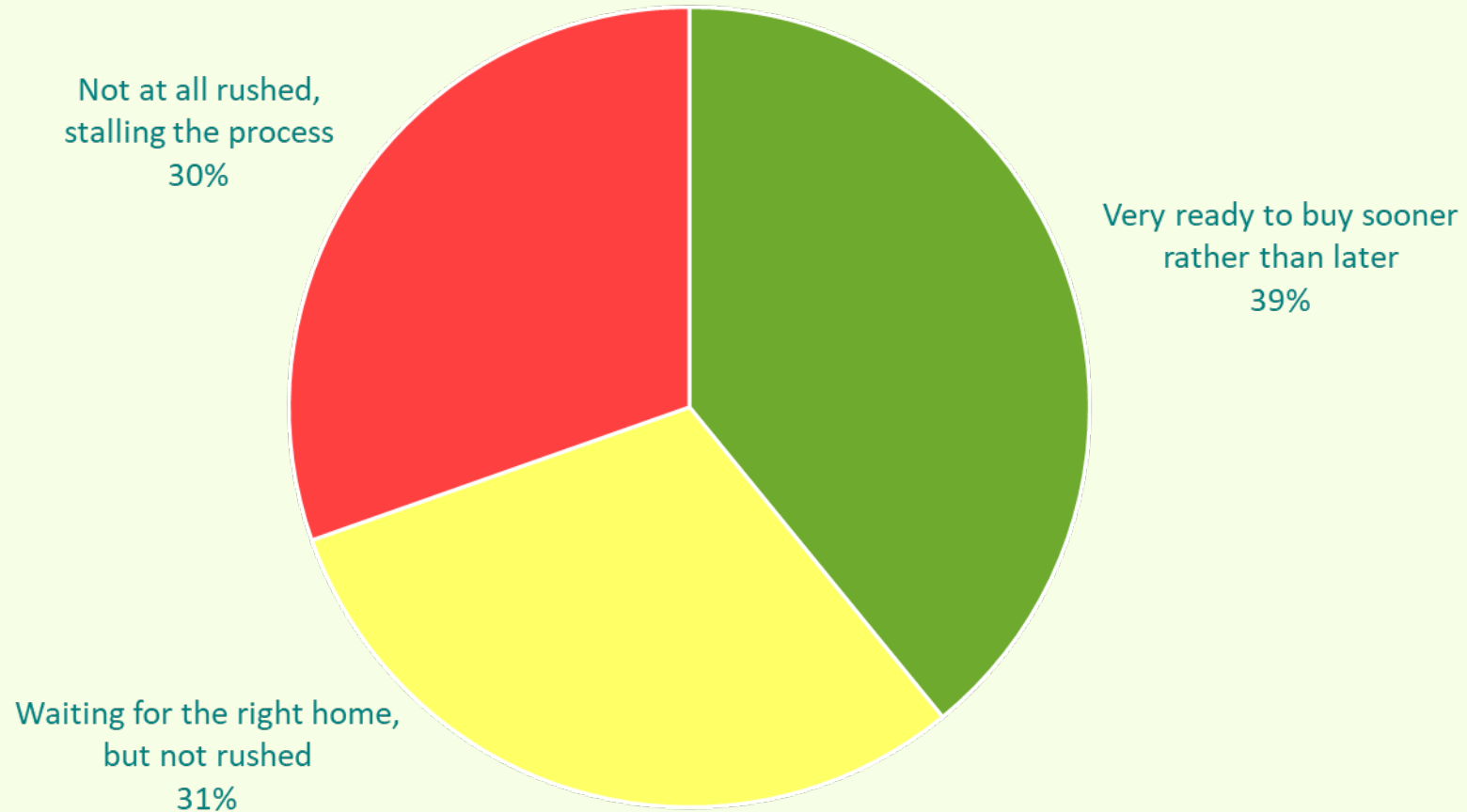
WITH ASSURANCES, 76% RETURN IN 3 MONTHS

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)?



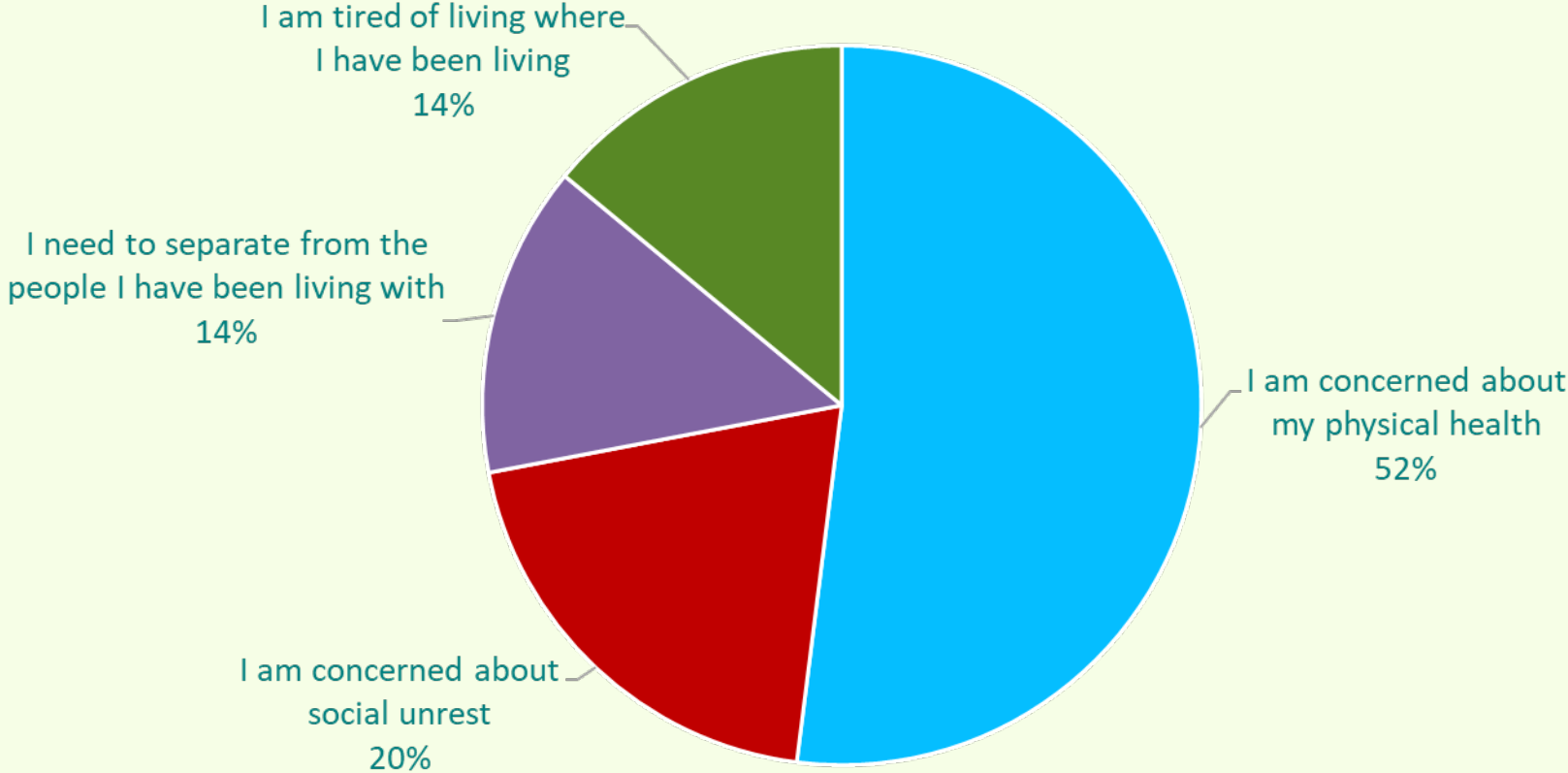
PLURALITY WANT TO MOVE SOONER THAN LATER

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



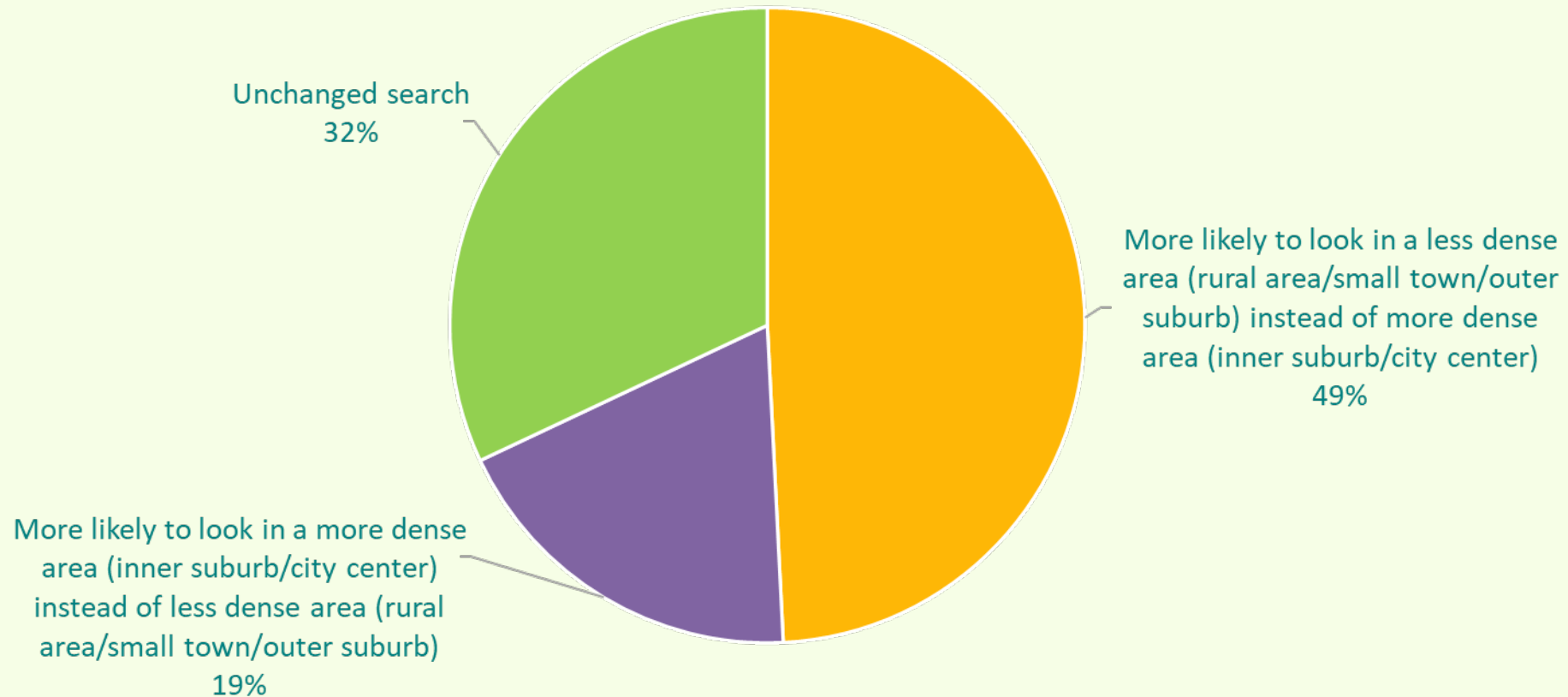
HEALTH CONCERNS ANIMATE MAJORITY OF SOON-MOVERS

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



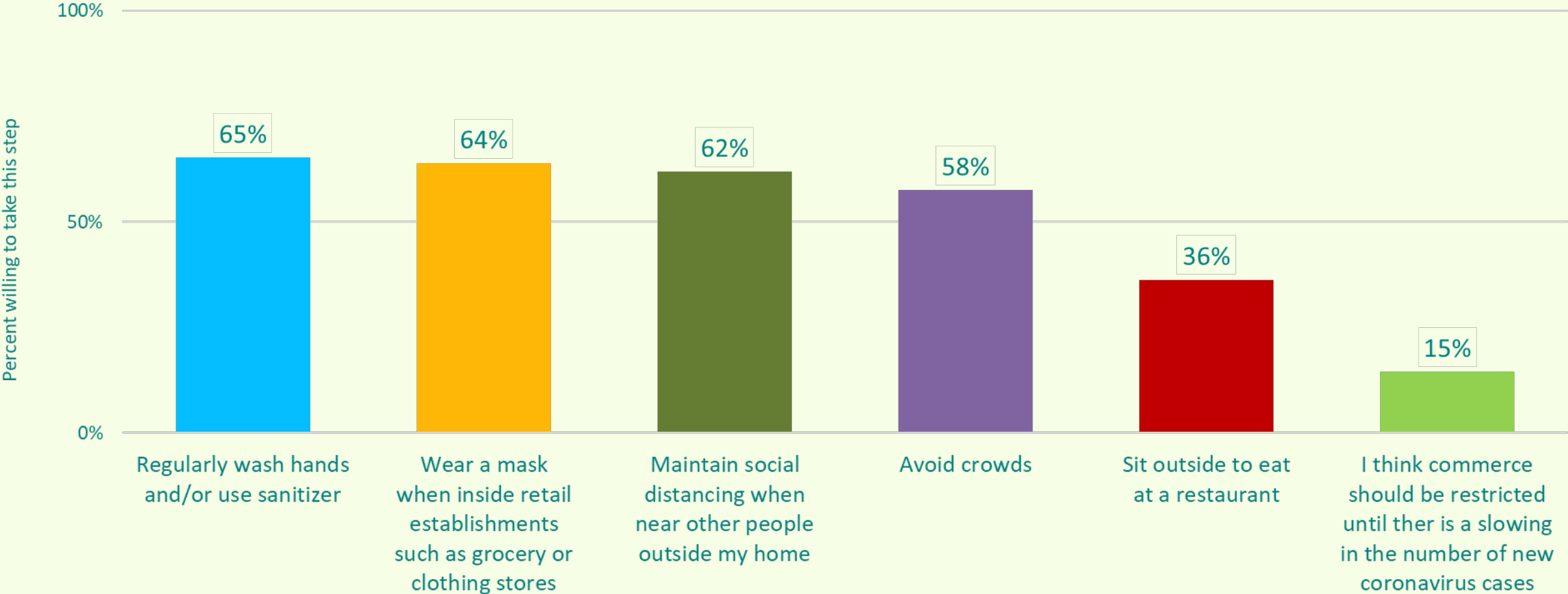
HALF LOOKING TO MOVE TO A LESS-DENSE AREA

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



MAJORITY WOULD DO THE BASICS TO KEEP ECONOMY GOING

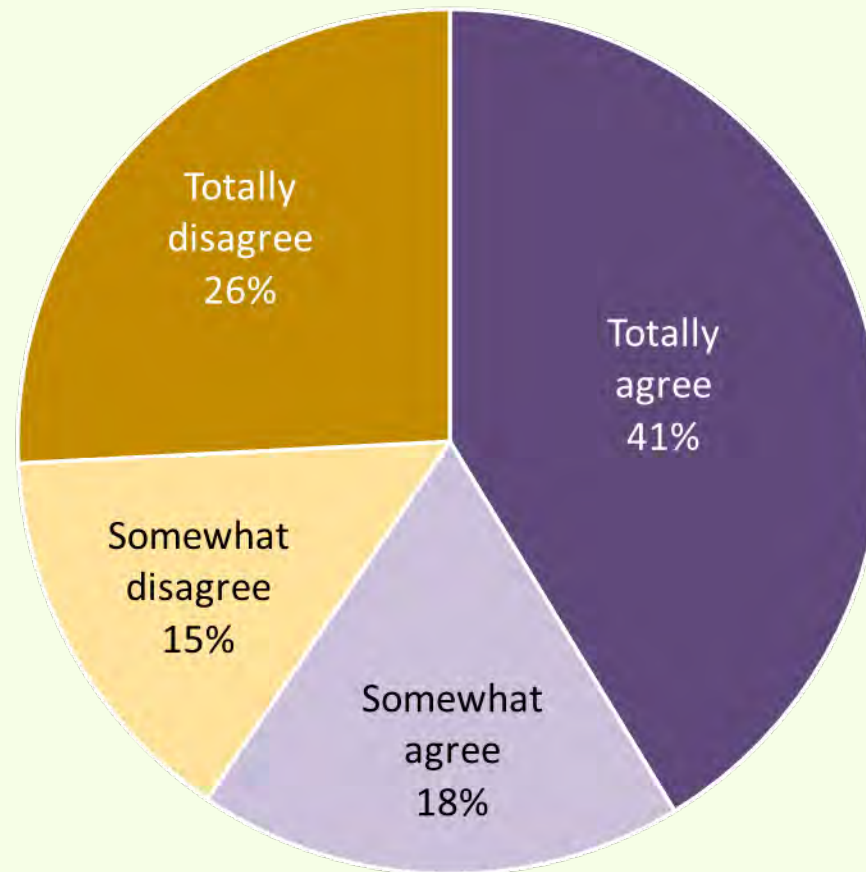
Some say that as the number of COVID-19 cases remains high, it's important to keep the economy as open as possible. Which of the following steps are you willing to take personally to ensure commerce continues? (Check all that apply)



Some insights on home service workers

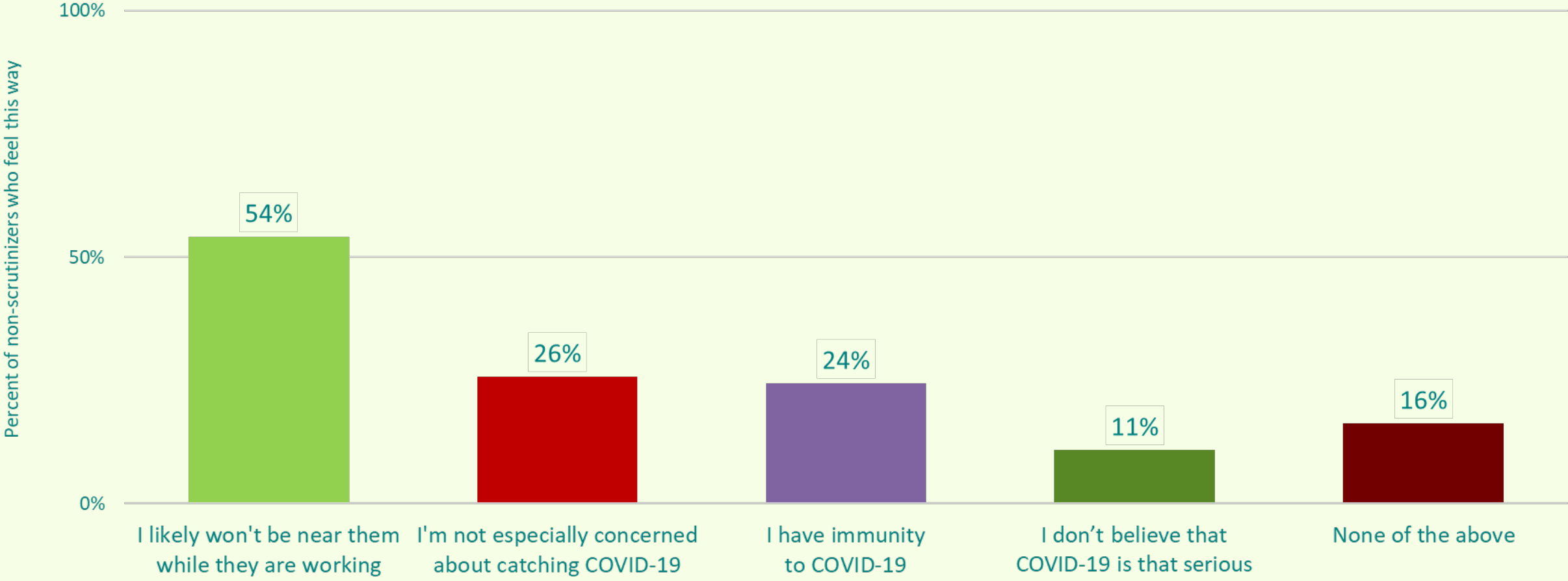
1/4 WOULD SCRUTINIZE SERVICE WORKERS' PROTECTIVE WEAR

I'm not likely to scrutinize the amount of protective wear that a service worker wears in my home.



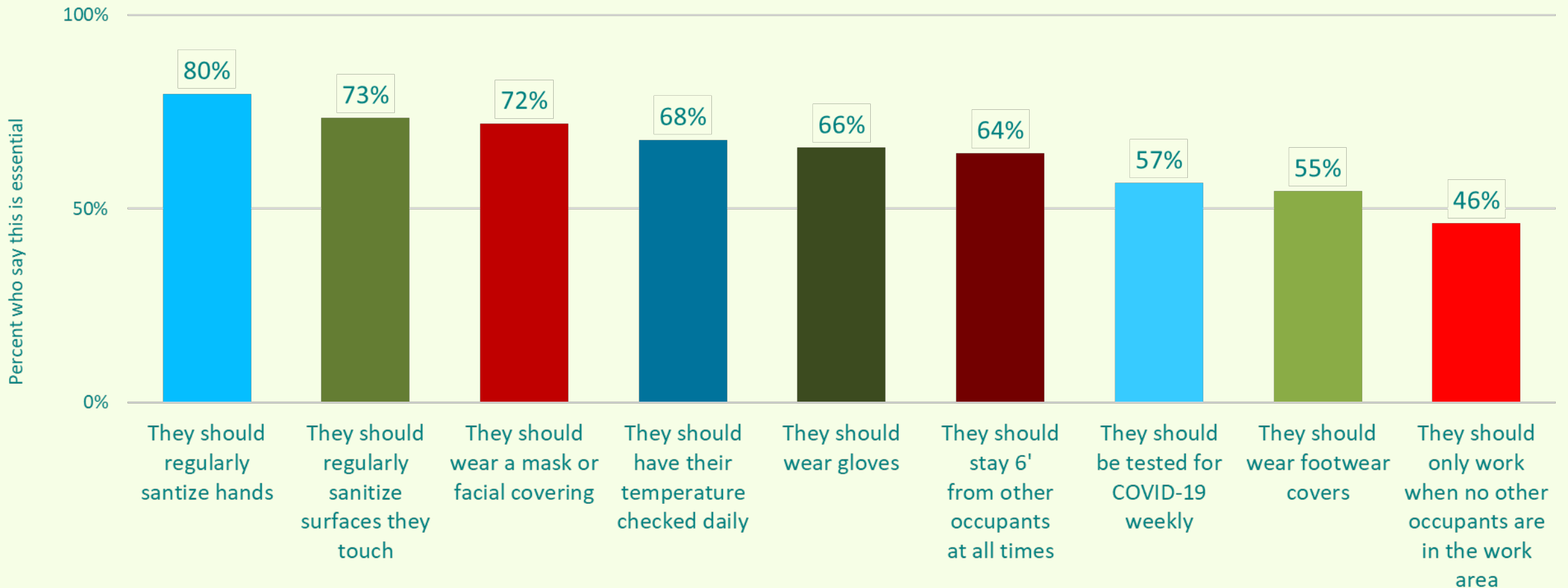
FOR THOSE WHO *DON'T* SCRUTINIZE, IT'S ABOUT DISTANCE

You indicated that you weren't likely to scrutinize what protective wear a service worker would wear in your home. Which, if any, of the following are reasons why you feel this way?



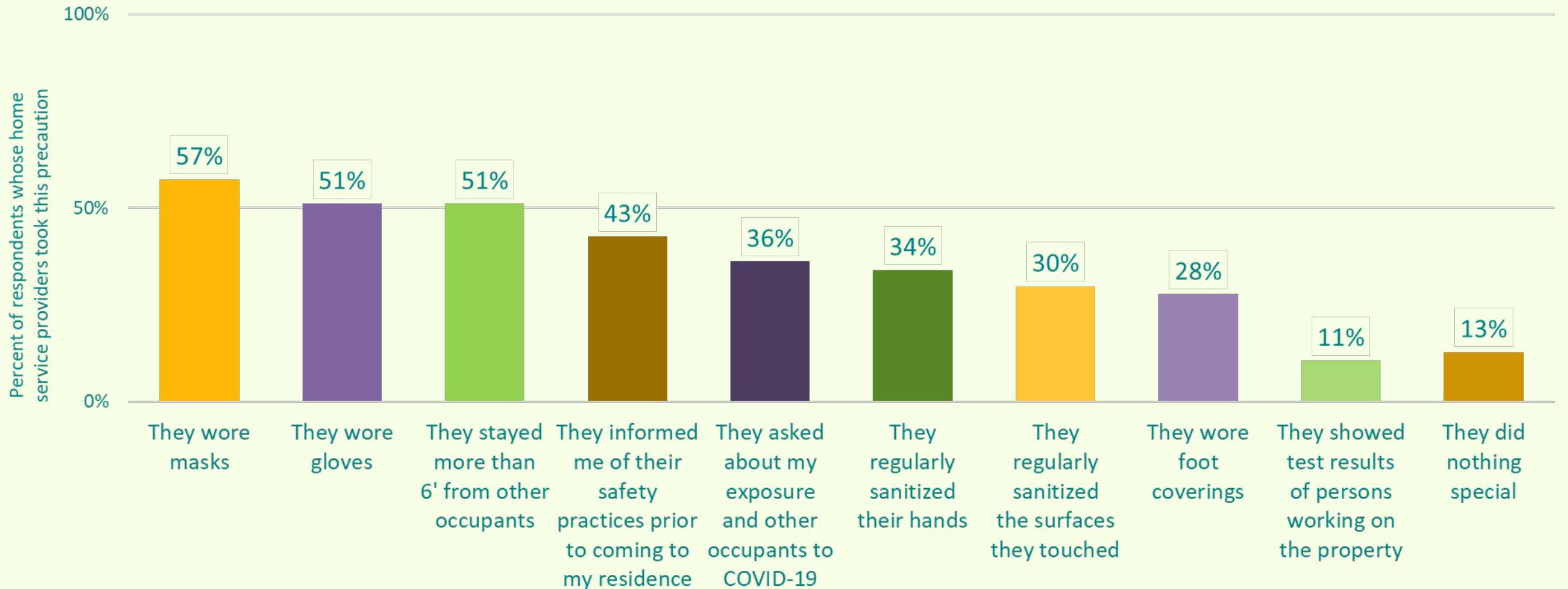
THESE ARE THE PRECAUTIONS CUSTOMERS SAY THEY WANT

Thinking about service providers that perform activities such as utility services, repairs, or renovations inside your home, please indicate how important it would be for each of the following protocols to take place surrounding their visit.



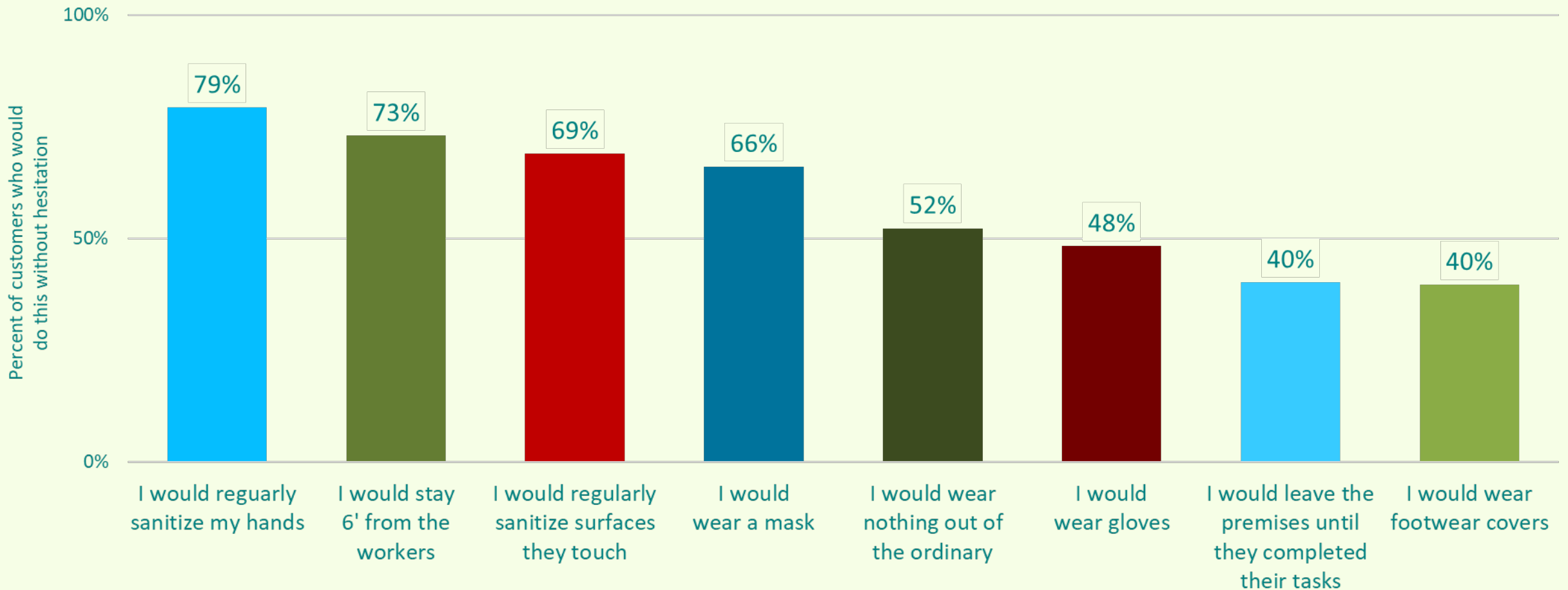
THESE ARE THE PRECAUTIONS CUSTOMERS ACTUALLY GOT

You indicated that you recently had services performed where you live. Which, if any of the following safety precautions or protocols did the services providers put in place when working in or around your home?



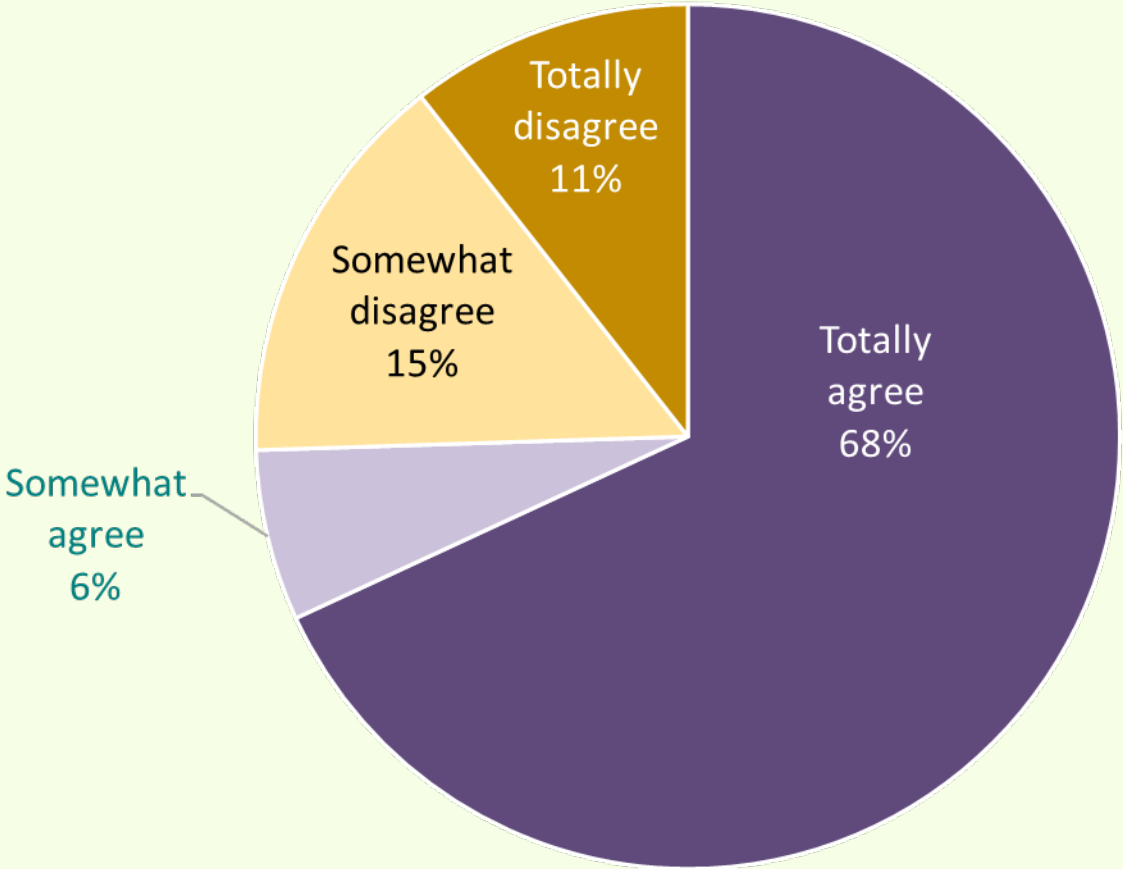
THESE ARE THE PRECAUTIONS CUSTOMERS TOOK THEMSELVES

Please indicate which of the following applies best to your own personal behaviors if/when a service worker was in your home.



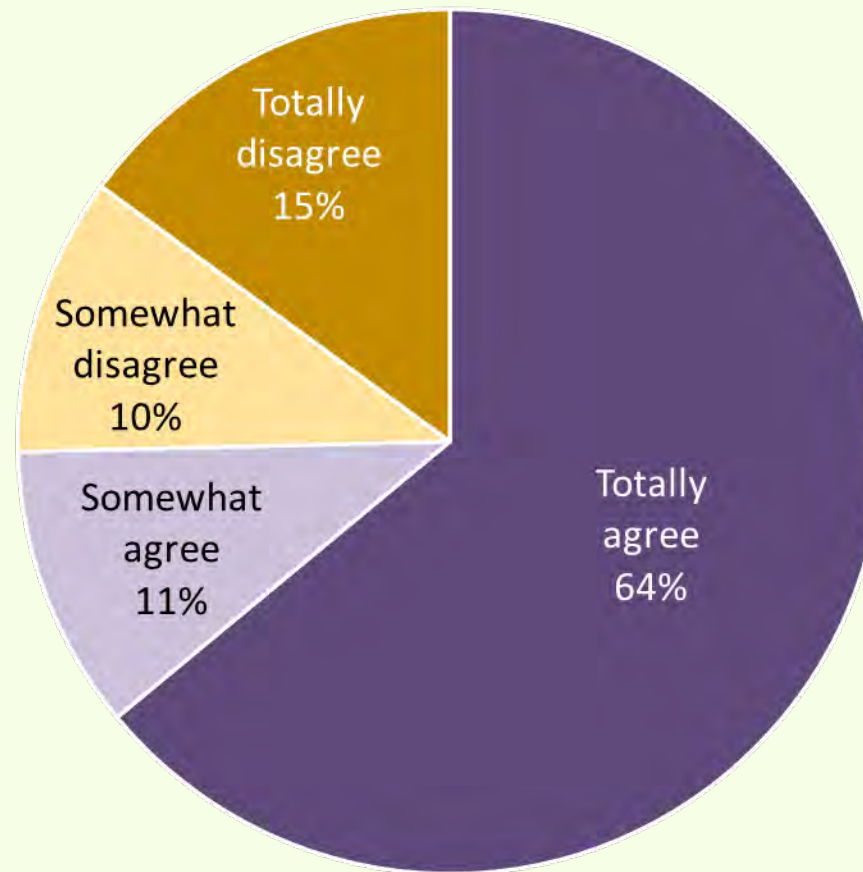
MOST WERE SATISFIED THAT SAFETY PROMISES WERE KEPT

The service workers who recently came to my residence lived up to the safety promises that they made prior to beginning their work.



3/4 FELT COMFORTABLE HAVING WORKERS IN THEIR HOMES

Considering current circumstances, I felt comfortable while the service workers were in my home.



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Matt Steffee, matt.steffee@engagious.com