



Georgia-Pacific

SMART RESTROOM TECHNOLOGY VALUE DRIVERS

- CONSUMER PUBLIC RESTROOM PERCEPTIONS SURVEY 2020 (PAGE 2)
- CONSUMER PUBLIC RESTROOM FRUSTRATIONS & IMPLICATIONS 2021 (PAGE 14)
- KOLO PREMIUM VALUE PERCEPTIONS 2022 (PAGE 23)



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CONSUMER PUBLIC RESTROOM PERCEPTIONS

- AVOIDANCE AND REASONS
- IMPACTING COMFORT LEVEL

September 14, 2020

PRO-20-4859

BACKGROUND AND METHODOLOGY

Key topics included:

- Public restrooms and the consumer mindset
- Avoiding the public restroom and reasons
- Comfort level with varied locations, behaviors and cleaning processes
- Impacts on confidence in cleaning/conditions
- Regard for cleaners and other frontline workers

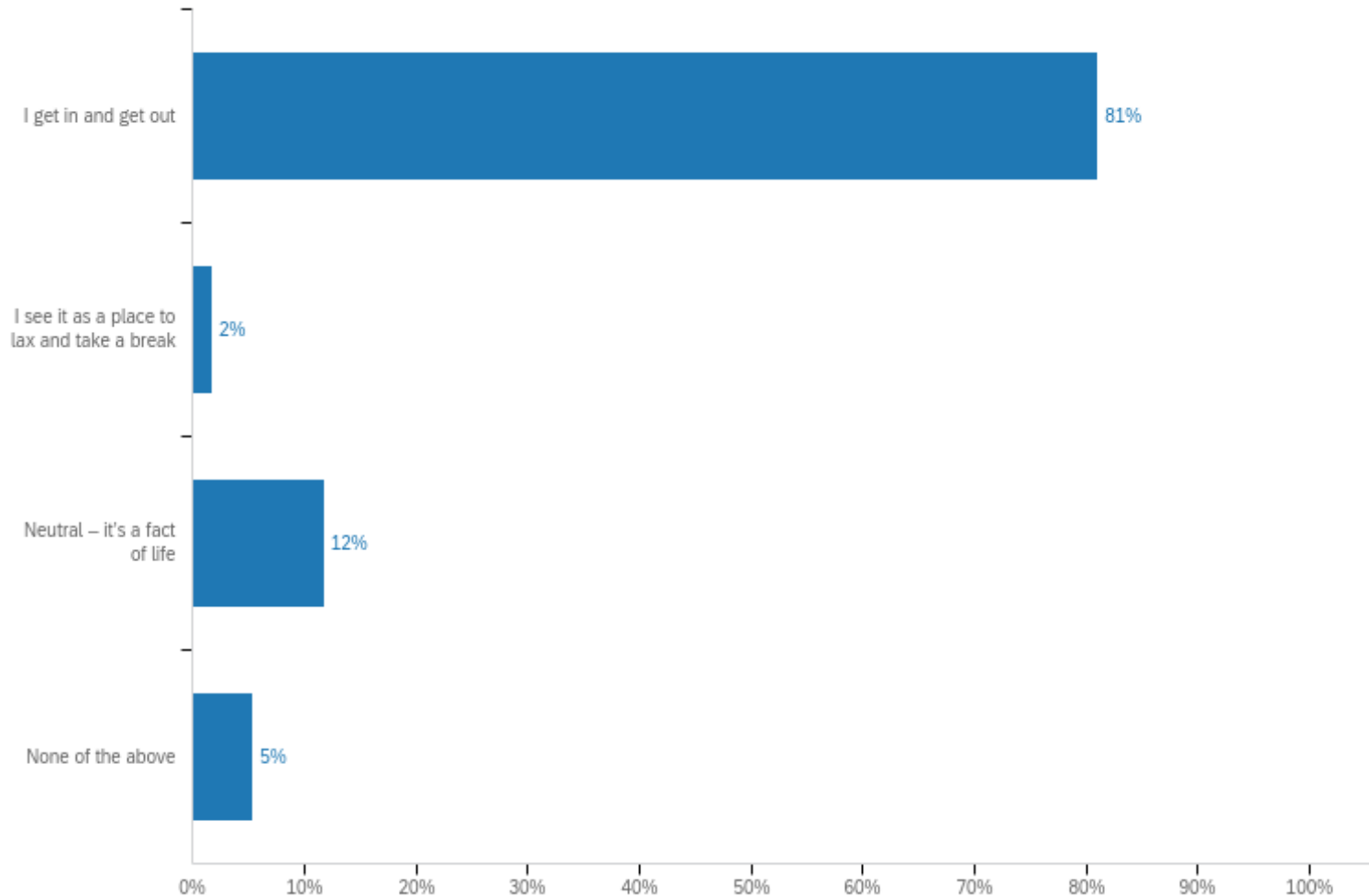
The platform used was Qualtrics and the sample provider was Dynata.

This was a survey posed to a gen pop sample that resulted in 629 completes.

The survey instrument and demographic breakdown is included in the appendix.



Mindset With Which Consumers Approach Using a Public Restroom

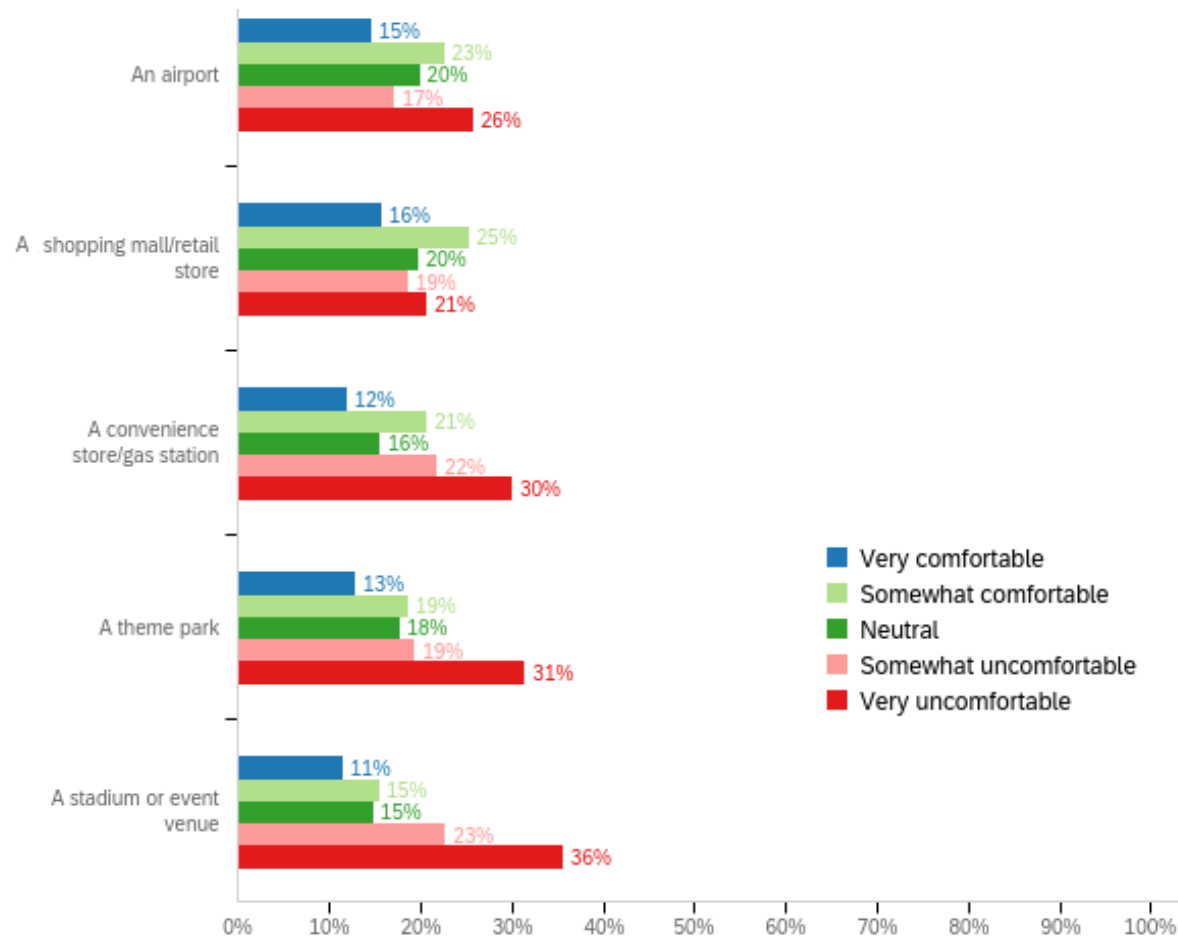
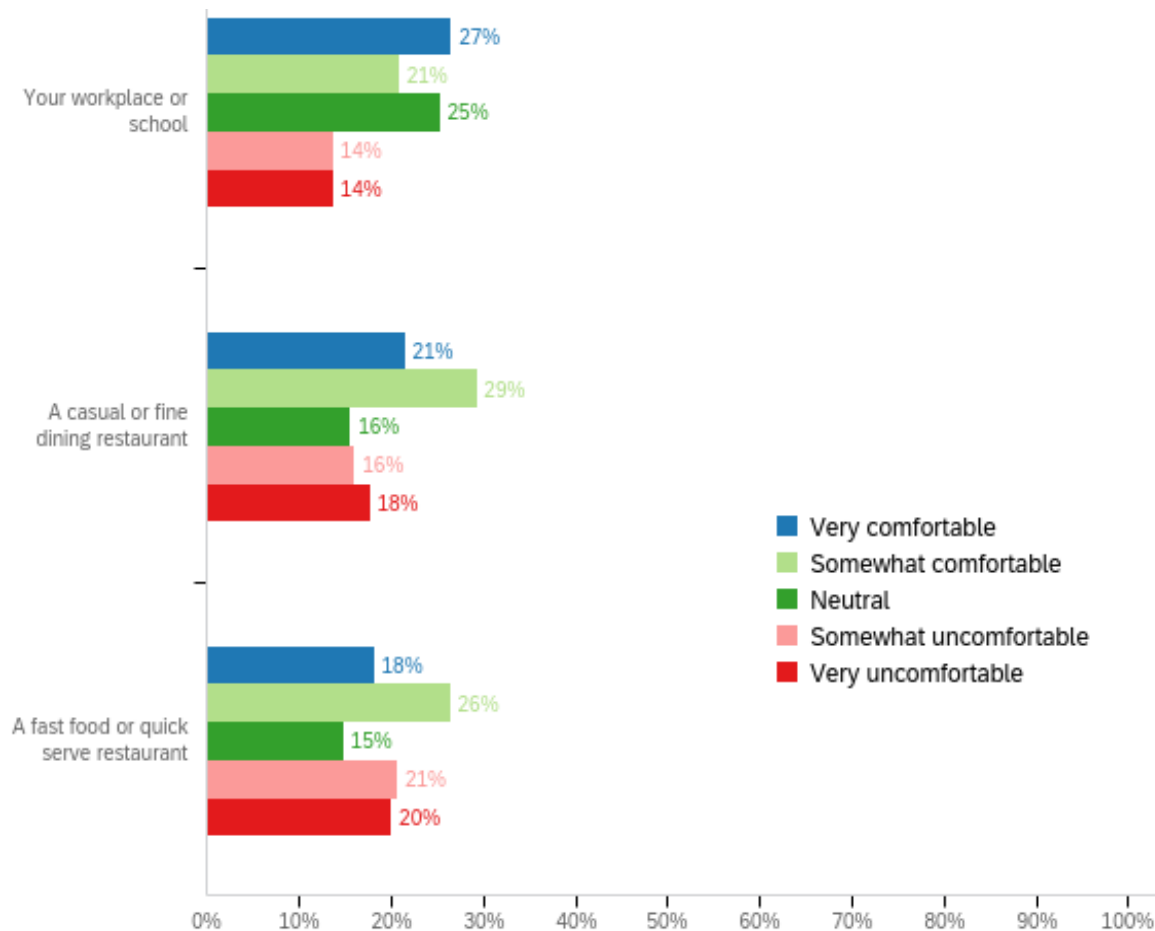


In general, consumer approach to a public restroom is with the mindset to **get in and get out**.

Q3.2 - In general, how do you approach using a public restroom?
n=629

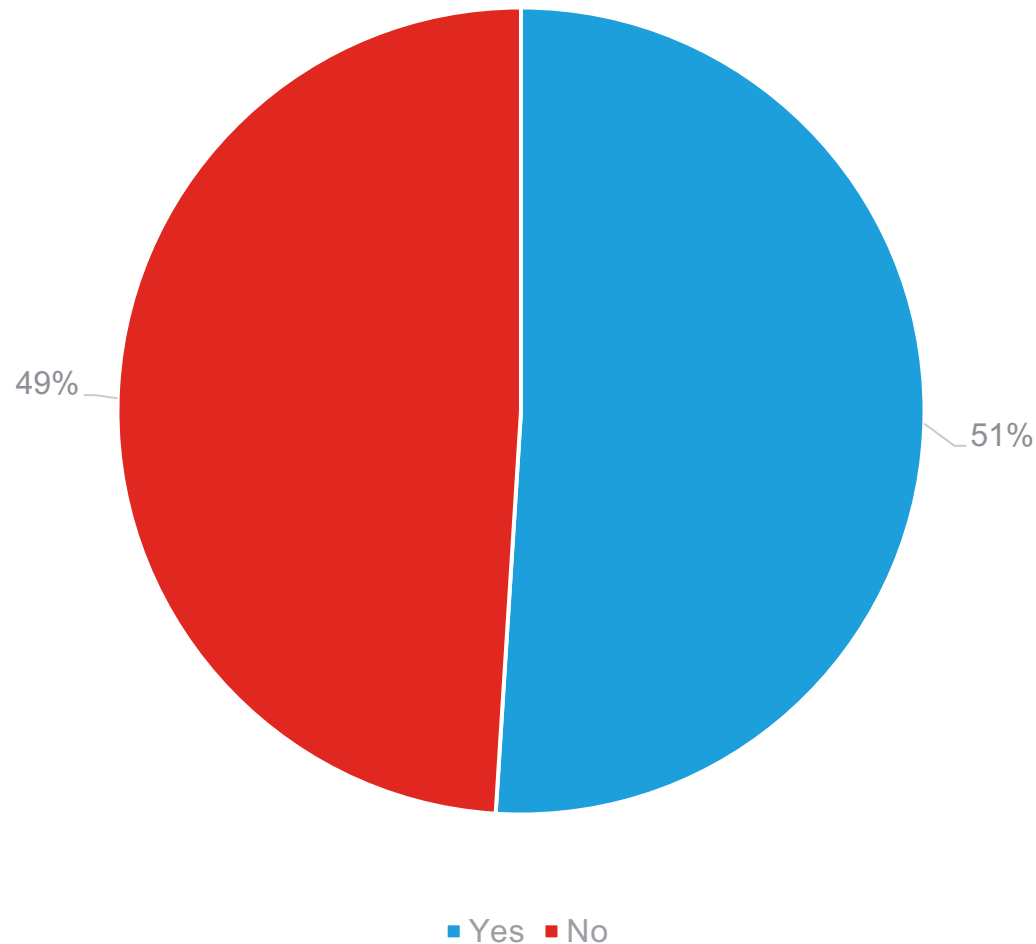


Consumers are most uncomfortable using a public restroom at a stadium or event venue, convenience stores, and theme parks indicating these very transient businesses will need to **work harder to gain consumers' trust**, even outside of COVID-19 times.



Q1.2/2.2 - Outside of COVID-19 times, generally, how comfortable are you using a public restroom in the following types of places:
n=629

Purposely Avoided a Specific Public Restroom?

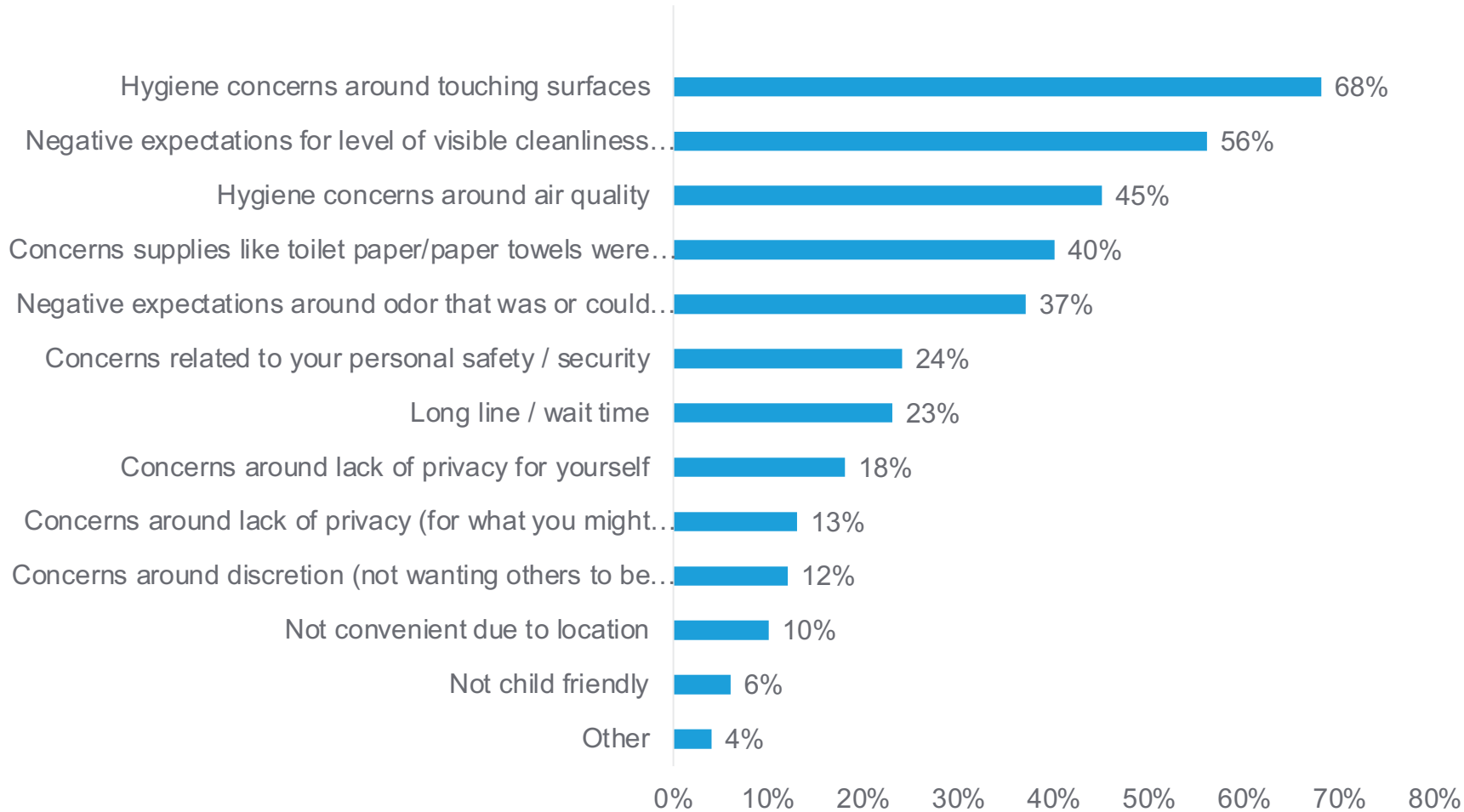


It says a lot about the reputation of the public restroom when, in the past year, **51% of consumers have purposely avoided using a *specific* public restroom.** This likely speaks to the impact of perceptions or the memorable nature of a bad experience.

When consumers avoid making a stop at a business or feel rushed to get in and out because nature is calling, that could mean **lost revenue.**

Q5.2 - In the past year (excluding for COVID-19 concerns), have you purposely avoided using a specific public restroom?
n=629

Reasons to Avoid a Specific Public Restroom

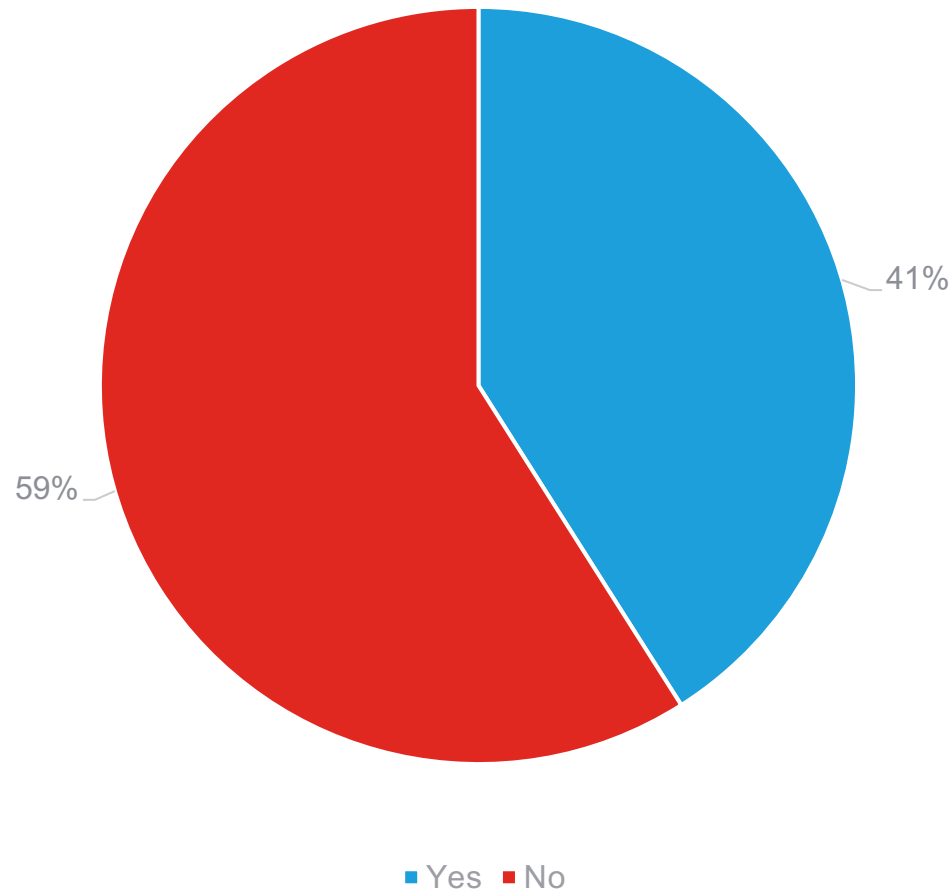


Among those who chose to purposely avoid a specific public restroom, **hygiene concerns related to touching surfaces was the leading reason**, followed by negative expectations related to overall cleanliness.

Q6.2 - If yes (avoided a specific public restroom), for what reason(s)? Select all that apply.
n=629



Altered/Adapted Route or Schedule to Avoid Using Any Public Restroom

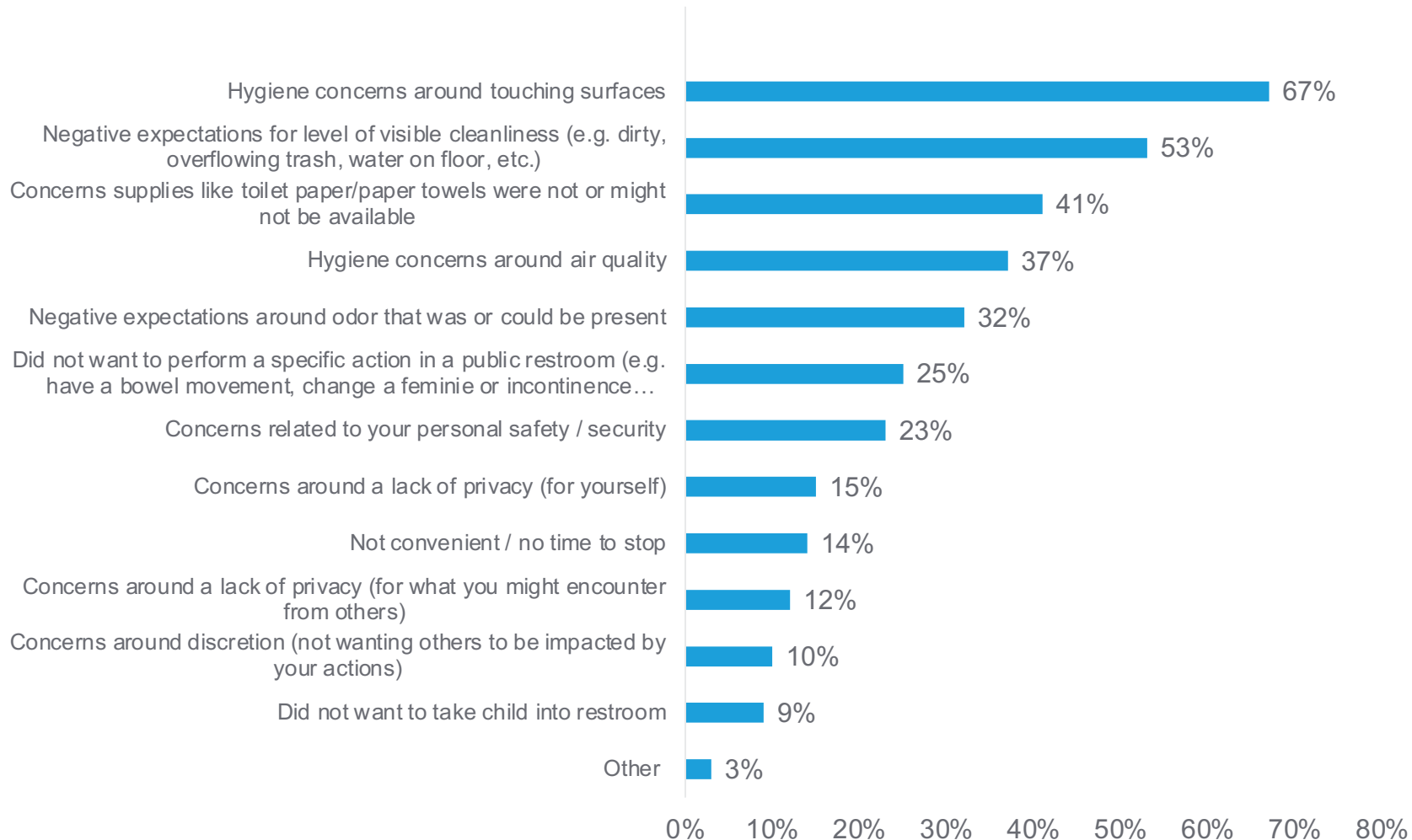


While half of these consumers indicated they have purposefully avoided using a specific public restroom, **41% said they have altered or adapted their route or schedule to avoid using *any* public restroom.**

This practice can feel restrictive for consumers and, as noted previously, potentially result in lost revenue for businesses.

Q7.2 - In the past year (excluding for COVID-19 concerns), have you altered or adapted your route or schedule to avoid using a public restroom in general (i.e., timing your errands to avoid the need to visit any public restroom)?

Reasons to Avoid Any Public Restroom

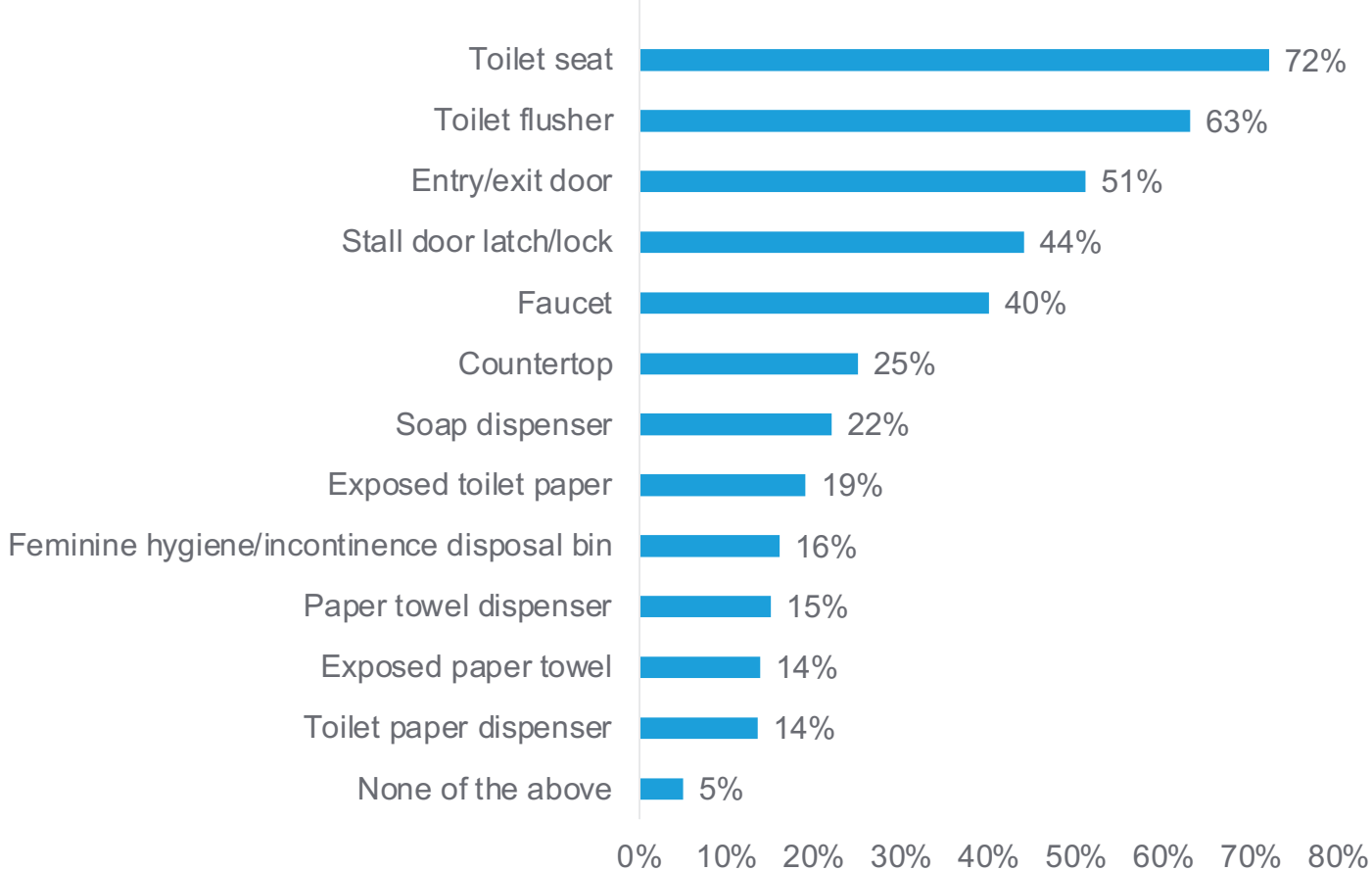


The reasons consumers altered their route or schedule to avoid using any public restroom further **affirms concerns around hygiene related to touching surfaces and negative expectations related to overall cleanliness.**

Q8.2 - If yes (altered route/schedule to avoid using any public restroom), for what reason(s)? Select all that apply.



Public Restroom Surfaces Consumers are Reluctant to Touch



Not surprisingly, the **toilet seat** was selected by nearly two-thirds as a public restroom surface consumers are reluctant to touch due to a concern for germs. Dirty toilet seats* have traditionally been a top restroom frustration.

Surface/item	% of those selecting this surface as a concern who ranked it as the #1 surface they are most reluctant to touch
Toilet seat	58%
Entry/exit door	35%
Toilet flusher	19%

Regarding entry/exit doors, a separate study** asking about NEW behaviors (including but not limited to public restrooms) adopted due to COVID-19 concerns showed that 35% of consumers are now using a towel/tissue to open doors, and 47% are now using a body part other than their hand to open doors (elbow, foot, etc.).

Q12.2 - Of the many public restroom surfaces, which, if any, are you reluctant to touch due to a concern for germs? Select up to 5. n=629

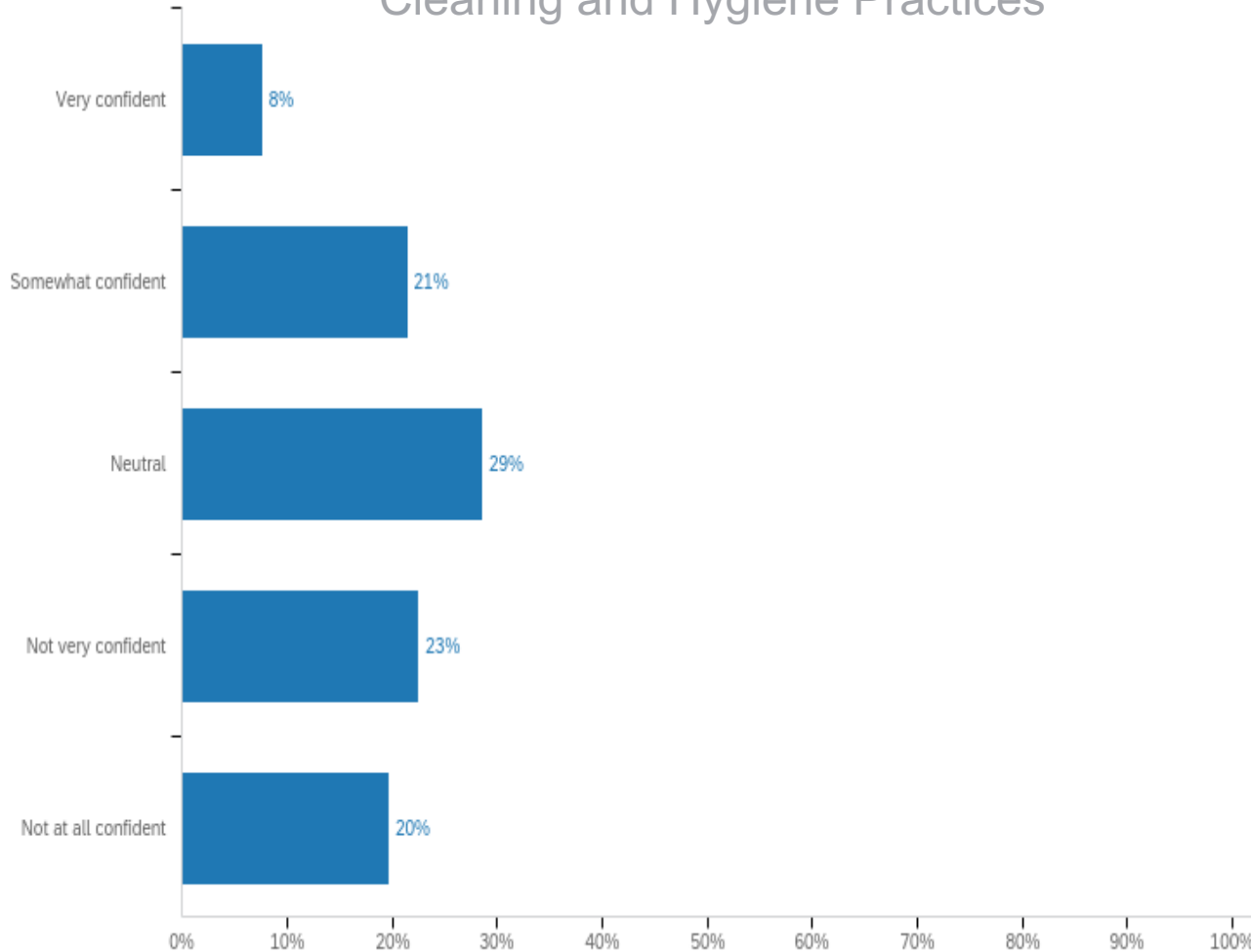
Q13.2 - Of the surfaces you are reluctant to touch due to a concern for germs, please drag and drop to arrange them in a rank order according to your avoidance. The surface you avoid most should be at the top.

*PRO-18-1945 Consumer Survey Washroom Frustrations

**PRO-20-4901 PR+Insights Initiative COVID Consumer Tracker



Level of Confidence in Public Restroom Cleaning and Hygiene Practices



While the public restroom does not necessarily enjoy a glowing reputation outside of the presence of COVID-19, concerns are heightened in the presence of the virus and talk of hygiene is at the forefront of the conversation.

And now, **every public space is suspect.**

Instilling confidence among consumers as to the hygiene/safety efforts and commitment by business operations is key to bringing them back, yet **43% of consumers lack confidence in the cleaning and hygiene practices utilized in public spaces** (including but not limited to public restrooms) and 17% said they have become less confident in the past 30 days (5% more confident, 78% about the same).

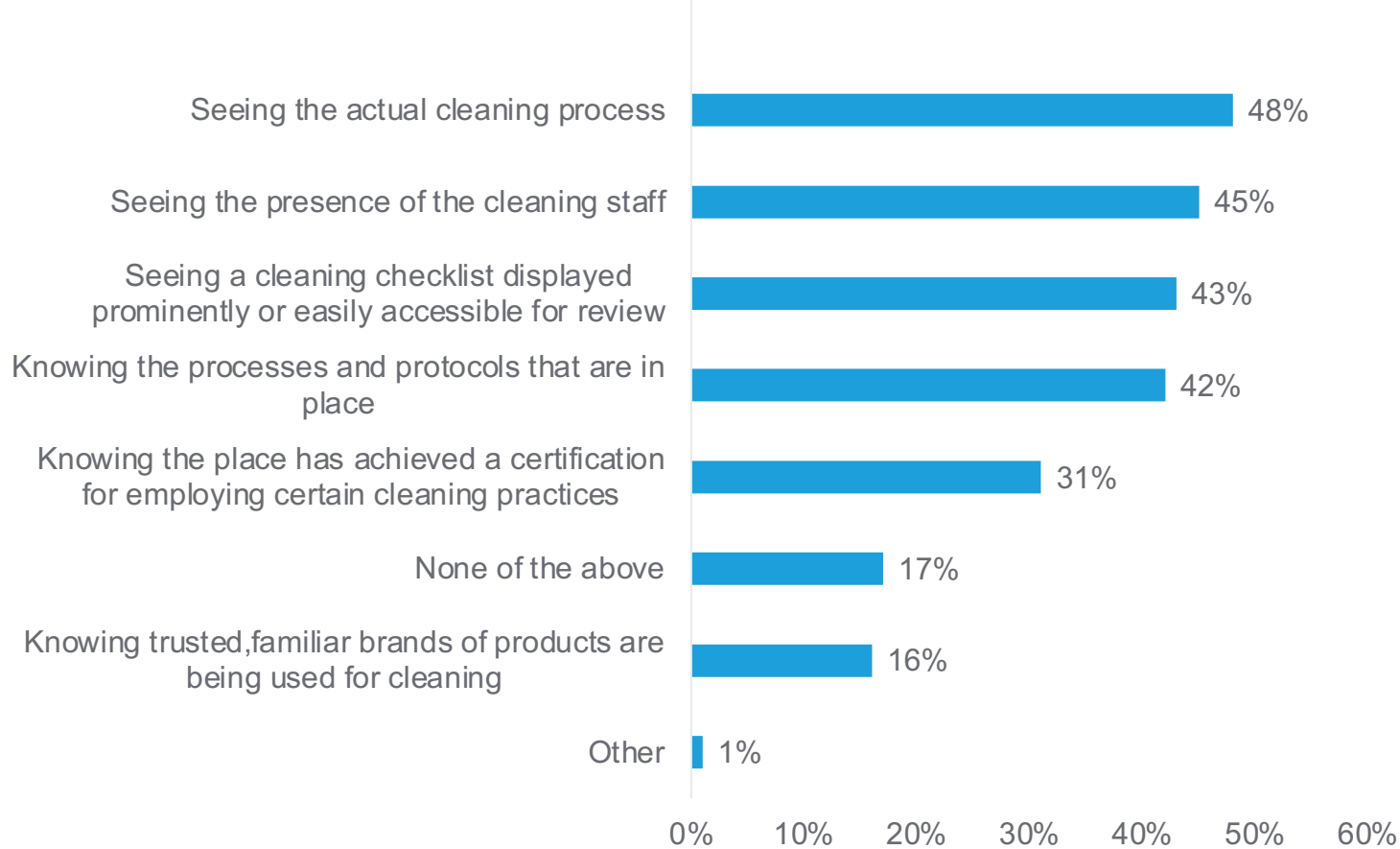
Q1.3 - Now, in the presence of COVID-19, in general, how confident are you in the restroom cleaning and hygiene practices employed in the public spaces you visit (e.g., restaurants, stores, offices)?

Q2.3 - How, if at all, has your confidence shifted over the past 30 days?

n=629



What Increases Consumer Confidence in Restroom Cleaning Practices?



To increase confidence among consumers related to hygiene and cleaning, **transparency and communication** of the practices appear to be key levers to pull.

Q4.3 - In the presence of COVID-19 as it persists in your area today, which of the following, if any, would increase your confidence in the restroom cleaning and hygiene practices employed in the public spaces you visit? Select all that apply.

n=629





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CONSUMER PUBLIC RESTROOM FRUSTRATIONS AND IMPACTS

- PROBLEMS TO SOLVE
- IMPACT ON PERCEPTIONS
- IMPORTANCE RELATIVE TO OTHER ASPECTS OF AN AFH EXPERIENCE

April 2021

CBT-21-5118

BACKGROUND AND METHODOLOGY

GP PRO continually seeks to understand the customer and consumer markets. As part of a broader exploration of washroom frustrations, the Insights team surveyed consumers to learn what issues in the public restroom space they most want solved.

In addition to learning top frustrations, the team also wanted to understand the impact of a clean, well-stocked restroom on perceptions of a company/facility and the importance of such relative to other elements that play into a workplace, restaurant, and live event venue experience.

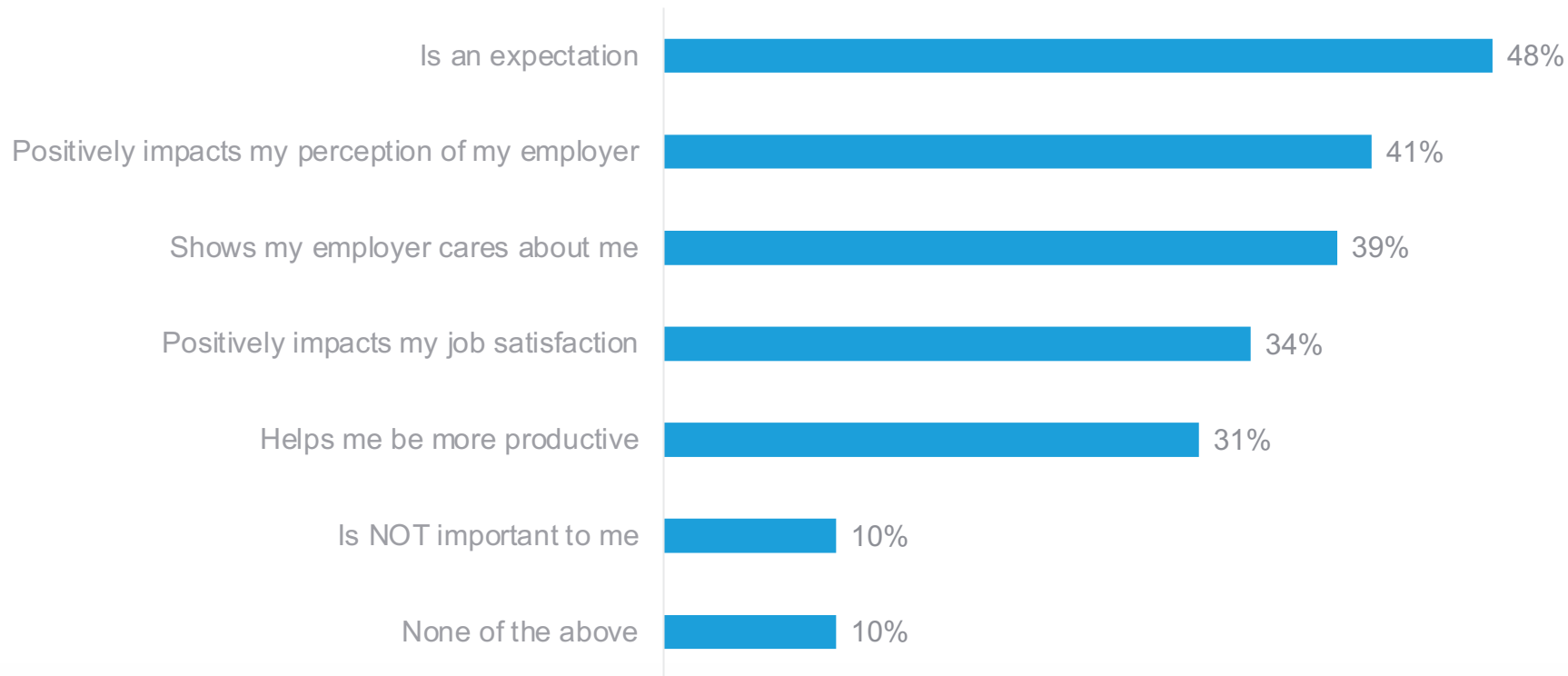
The online platform InstantPop (popresearch.com) was utilized to reach a sample of 500 consumers, mid-March 2021.

Note that some totals might not equal 100% due to rounding.

IMPACT OF RESTROOM CONDITIONS | WORKPLACE

For those who work outside the home, having a clean and well-stocked restroom is an expectation for nearly half of these consumers. It also has a positive impact on the employee's perception of their employer and their job satisfaction for more than one-third – **both elements that can contribute to employee retention.**

Having a clean, well-stocked restroom available...



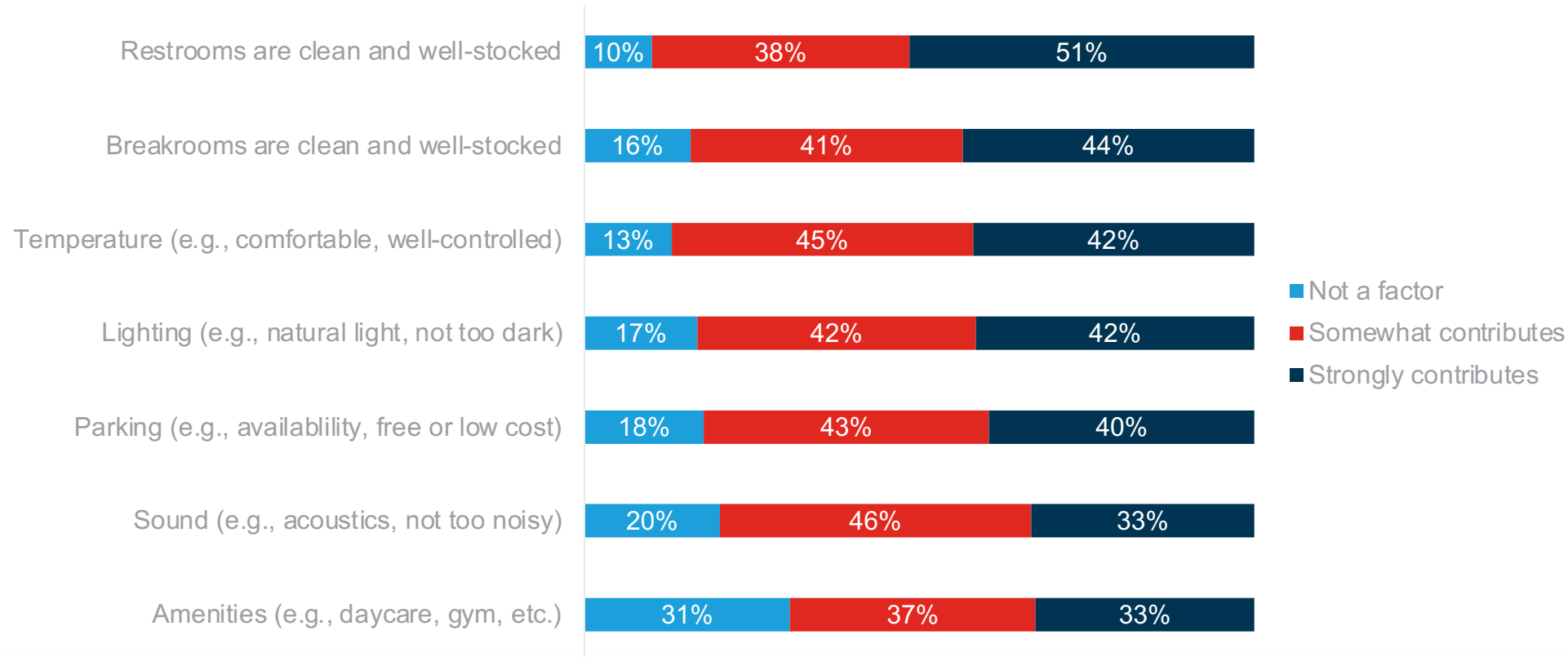
Q3. Which of the following statement(s) are true for you with regard to your place of employment? As an employee, having a clean, well-stocked restroom available... n=355, employed outside the home



IMPORTANCE OF THE RESTROOM | WORKPLACE

For those who work outside the home, **having a clean and well-stocked restroom contributes to the employee's satisfaction with the workplace** for more people than other typical workplace amenities and design considerations.

Elements Contributing to Satisfaction with the Workplace Environment



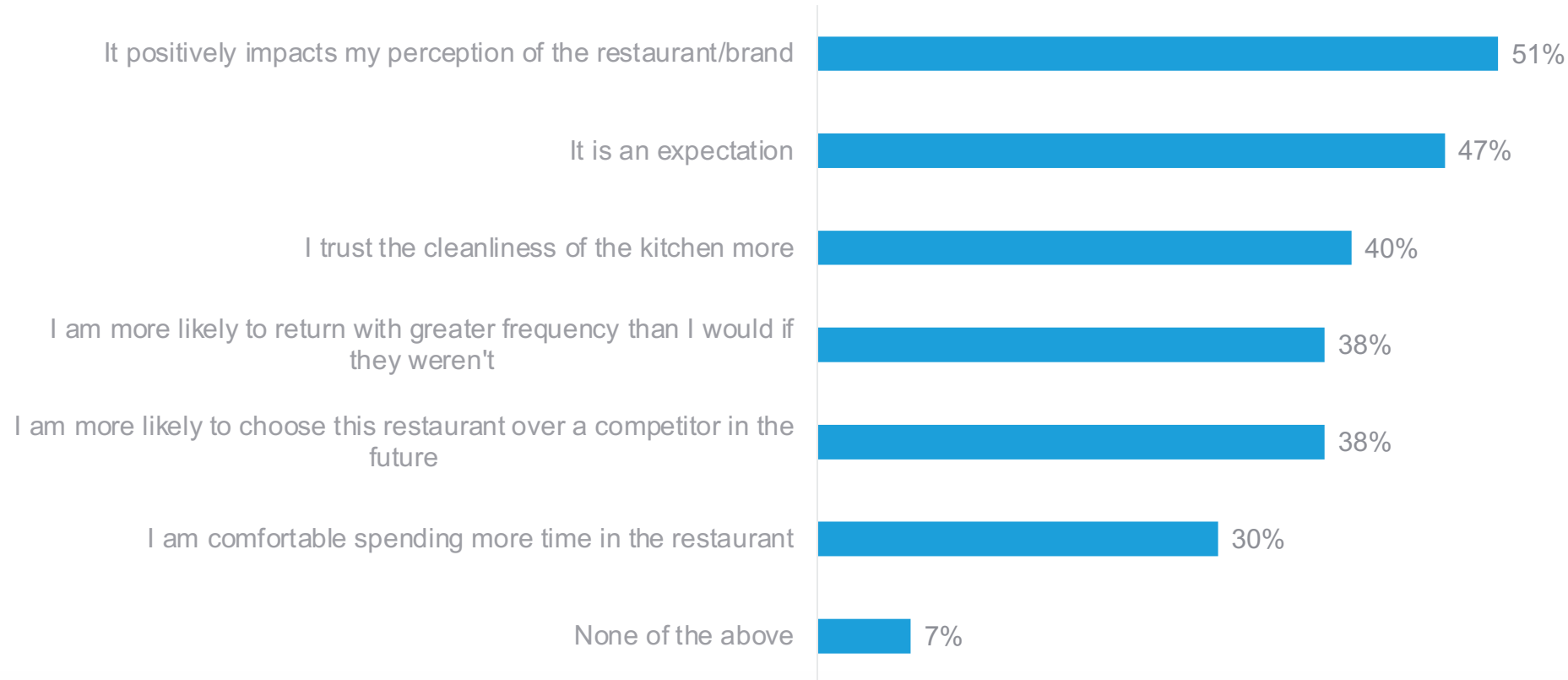
Q4. Outside of COVID times, how strongly does each of the following contribute to your satisfaction with your work environment in general? n=335, employed outside the home



IMPACT OF RESTROOM CONDITIONS | RESTAURANTS

Just over half of consumers note how a **clean restroom positively impact perceptions**. And with restroom conditions impacting restaurant choice and frequency of visits for more than a third, a **clean, well-stocked restroom could positively impact revenue for operators**.

Having a clean, well-stocked restroom available...



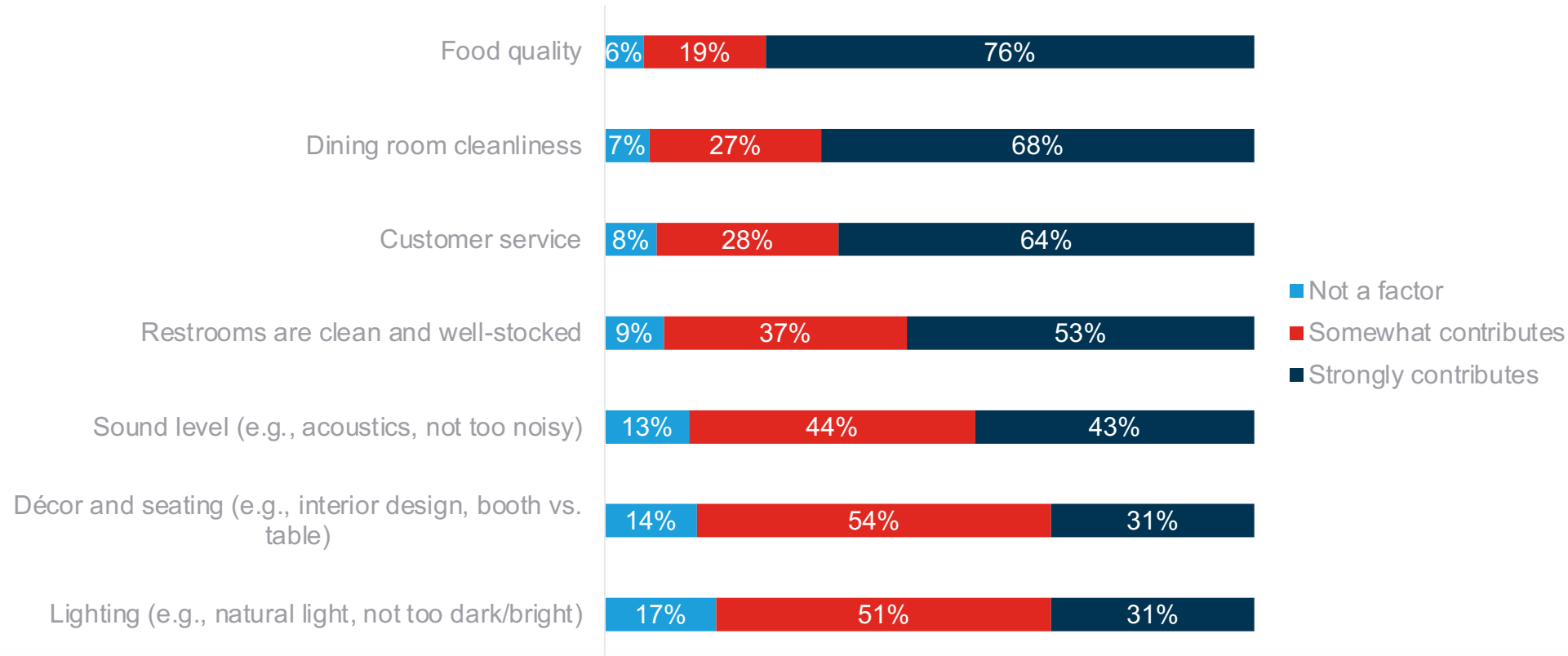
Q5. Thinking about time spent in a restaurant, which of the following statements are true for you? If the restrooms are clean and well-stocked... n=445, restaurant diners



IMPORTANCE OF THE RESTROOM | RESTAURANTS

While food quality, dining room cleanliness and customer service are top contributors to a positive dining experience, **having clean and well-stocked restrooms are seen as more important compared to elements of design** – things into which many brands invest heavily.

Elements Contributing to Satisfaction with a Restaurant Experience

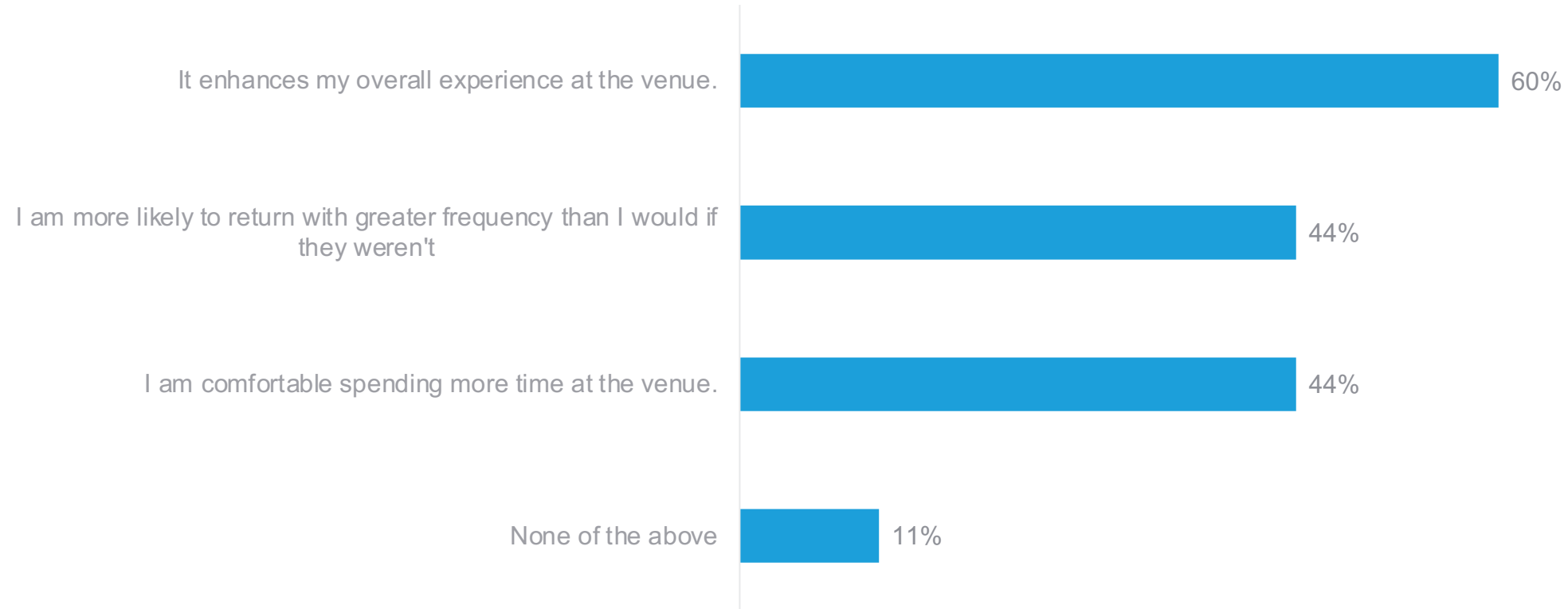


Q6. Outside of COVID times, how strongly does each of the following contribute to your overall satisfaction with a restaurant experience in general? n=450, restaurant diners

IMPACT OF RESTROOM CONDITIONS | EVENT VENUES

For 60% of event goers, good restroom conditions enhance the overall experience. **Bottom line, restrooms matter.** Nearly one-half note how restrooms can impact frequency of visiting and time spent at the venue, potentially resulting in higher revenues.

Having a clean, well-stocked restroom available...



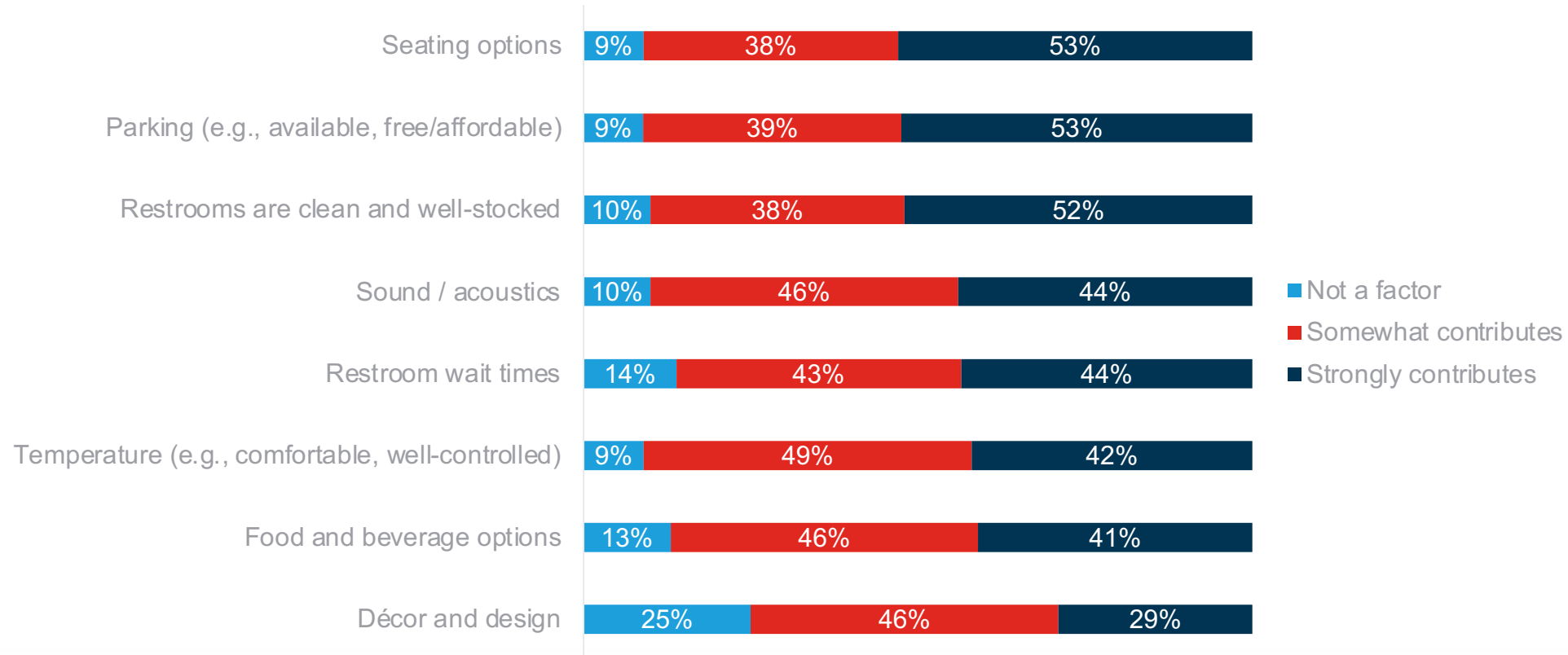
Q7. Thinking about live event venues such as stadiums, arenas, and concert halls, which of the following statements are true for you? If the restrooms are clean and well-stocked... n=375, event goers



IMPORTANCE OF THE RESTROOM | EVENT VENUES

For just over half of these event-goers, having clean and well-stocked restrooms are as impactful on satisfaction as parking and seating options, traditionally two major considerations when purchasing tickets for an event.

Elements Contributing to Satisfaction with a Live Event Venue



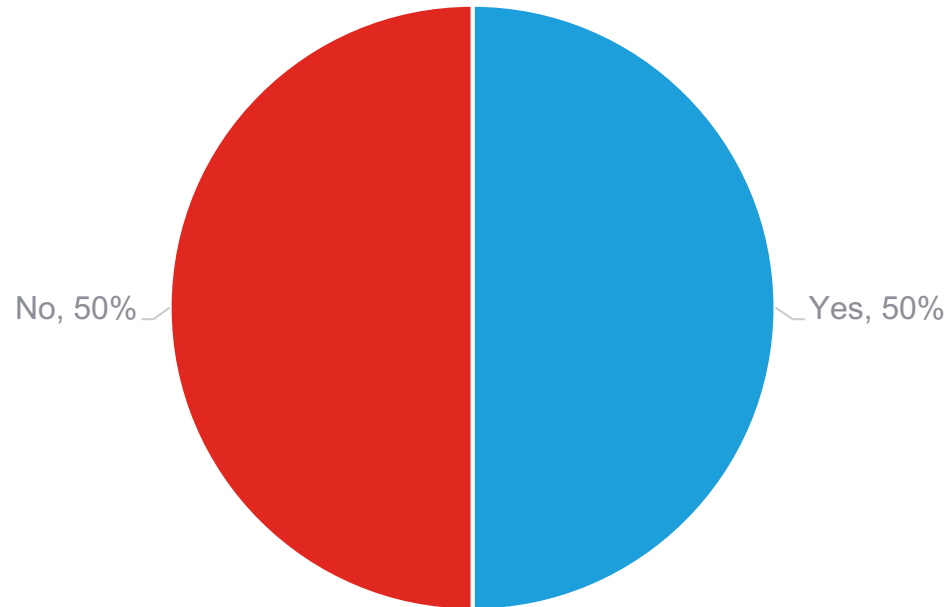
Q8. Outside of COVID times, how strongly does each of the following contribute to your satisfaction with the overall experience at live event venues (e.g. concerts, stadiums, arenas)? n=400



THE RESTROOM AS THE DEAL-BREAKER

Half of consumers reported that they have, at some time, chosen not to return to a business because their restrooms were not clean and well-stocked. When businesses consider the cost of attracting a customer and potential lost revenue from one that does not return, the cost of keeping a restroom in good condition comes across as a great value play.

Have you ever chosen not to return to a business because their restrooms were not clean and well-stocked?



Q10. Have you ever chosen not to return to a business because their restrooms were not clean and well-stocked? n=500





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KOLO PREMIUM VALUE PERCEPTION RESEARCH

- PROPERTY MANAGEMENT PROFESSIONALS
- COMMERCIAL REAL ESTATE BROKERS

September 2022

NCT-22-78452

KEY FINDINGS

After being introduced to KOLO in the context of the survey, **nearly all (99%) of respondents believe a building offering KOLO warrants some premium above base rent**, with almost **2/3 of respondents (63%) indicating a premium of 3-5% is justified.**

- **93% (T2B) of property managers and 98% (T2B) of commercial real estate brokers consider “consistently clean and well-stocked restrooms” important for attracting and retaining tenants.** It generally fell within the top 3-4 amenities in terms of importance, outranking more expensive investments such as onsite cafeterias, gyms and childcare.
- **45% of property managers feel a smart monitoring system that helps ensure consistently clean and well-stocked restrooms could positively impact tenant satisfaction.** 42% noted the same of touchless towel/soap dispensers in the restroom. 50% feel high quality disposables in the breakroom/cafeteria could positively impact tenant satisfaction.
- Asked to consider what premium, if any, above base rent “a smart monitoring system that helps ensure consistently clean and well-stocked restrooms” would be worth, 93% of property management professionals and 92% of commercial real estate brokers feel it warrants some premium over base rent. **Two-thirds (66%) of PMs and 57% of commercial real estate brokers put that premium at or above 3%.**
- After being introduced to the KOLO Smart Monitoring System in the context of the survey (description and dashboard images), **96% agree that KOLO can have an impact on restroom conditions** and half (51%) identify “maintaining a hygienic facility” as one of the most important benefits KOLO could provide.

KEY IMPLICATIONS

These real estate professionals clearly understand the importance of providing clean and well-stocked restrooms to tenants and acknowledge the impact this factor can have on attracting and retaining tenants, even over and above more significant investments such as onsite cafeterias, gyms and childcare.

This sentiment matches insights from consumers regarding the impact of restroom conditions from a previous study.

IMPACT OF RESTROOM CONDITIONS | WORKPLACE

The level of impact on someone's experience with your business or facility might surprise you.

89% of consumers said **having clean and well stocked restrooms contribute to their satisfaction** with the workplace environment.

Comparatively, only 70% said amenities such as daycare or a gym contribute to their satisfaction.

Which is the **better, easier, lower-cost** investment?



In today's labor challenged market, don't you want to **give employees every reason to STAY?**

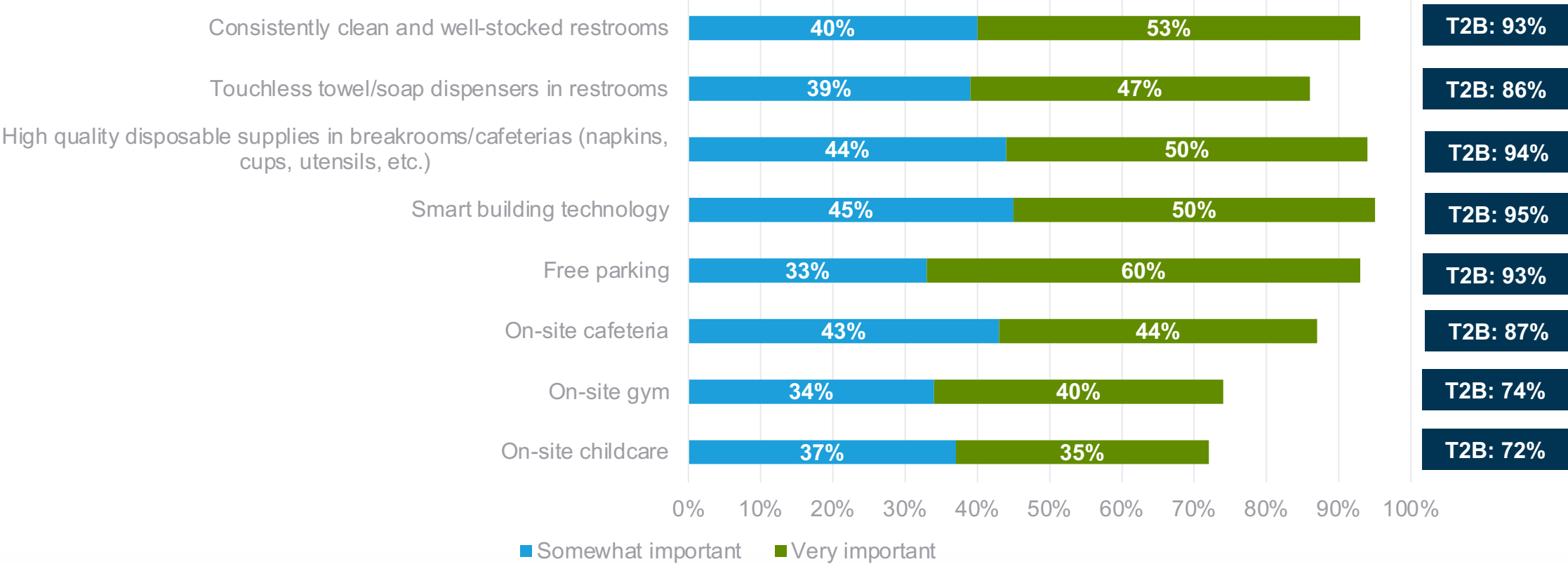
GP PRO Proprietary Research: CBT-21-5118



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The clear majority (93%) of property management professionals consider “consistently clean and well-stocked restrooms” important for attracting and retaining tenants. More than half (53%) consider it “very important.” This is among the top four most important factors (in good company with smart building technology, high quality breakroom disposables and free parking).

Importance of Building Elements / Amenities For Attracting and Retaining Tenants – PROPERTY MANAGERS

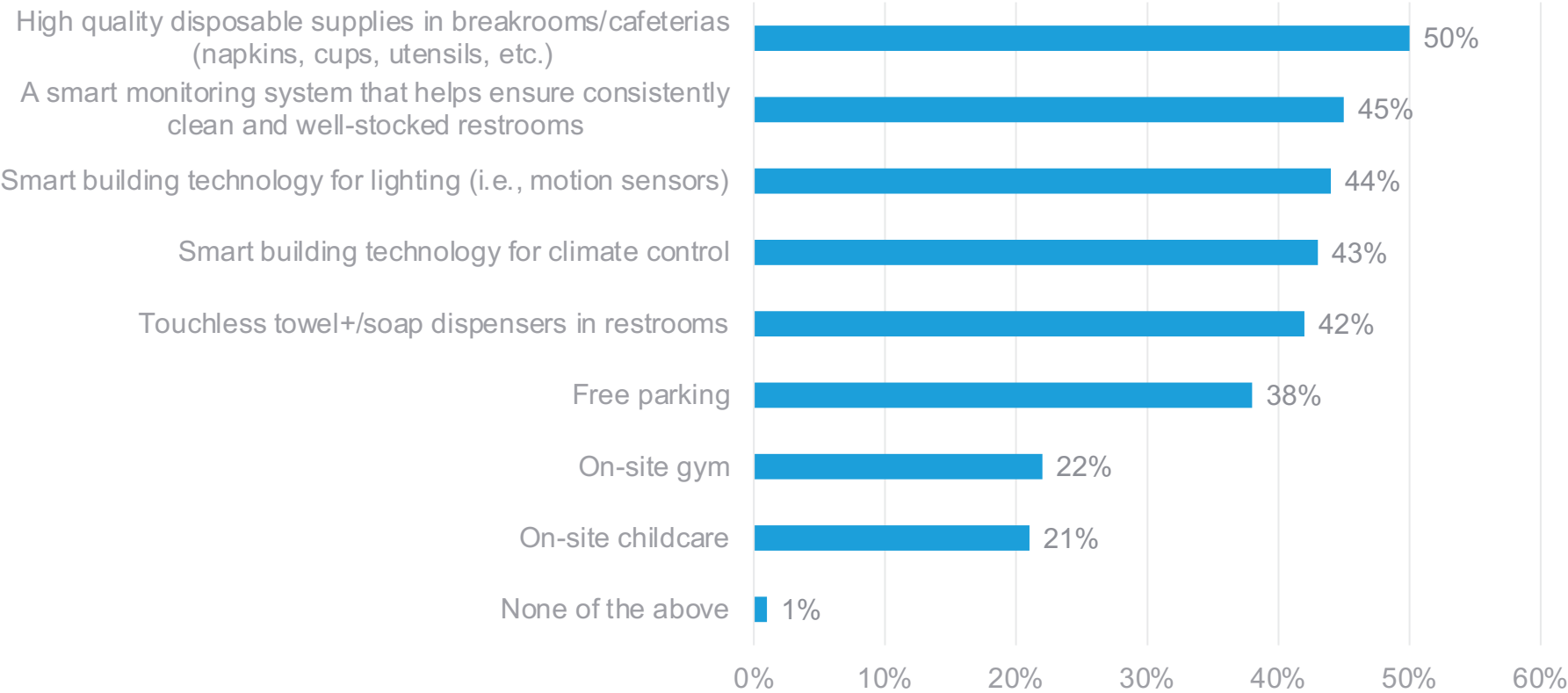


Q12: Thinking of the physical workplace environment and amenities your building could provide for tenants, how important to attracting and retaining tenants are the following?
 Base: Property Management Professionals, n=103



Asked more specifically about “a smart monitoring system to help ensure consistently clean and well-stocked restrooms”, 45% feel such technology could positively impact tenant satisfaction.

Elements / Amenities PMs Feel Improve or Could Improve Tenant Satisfaction

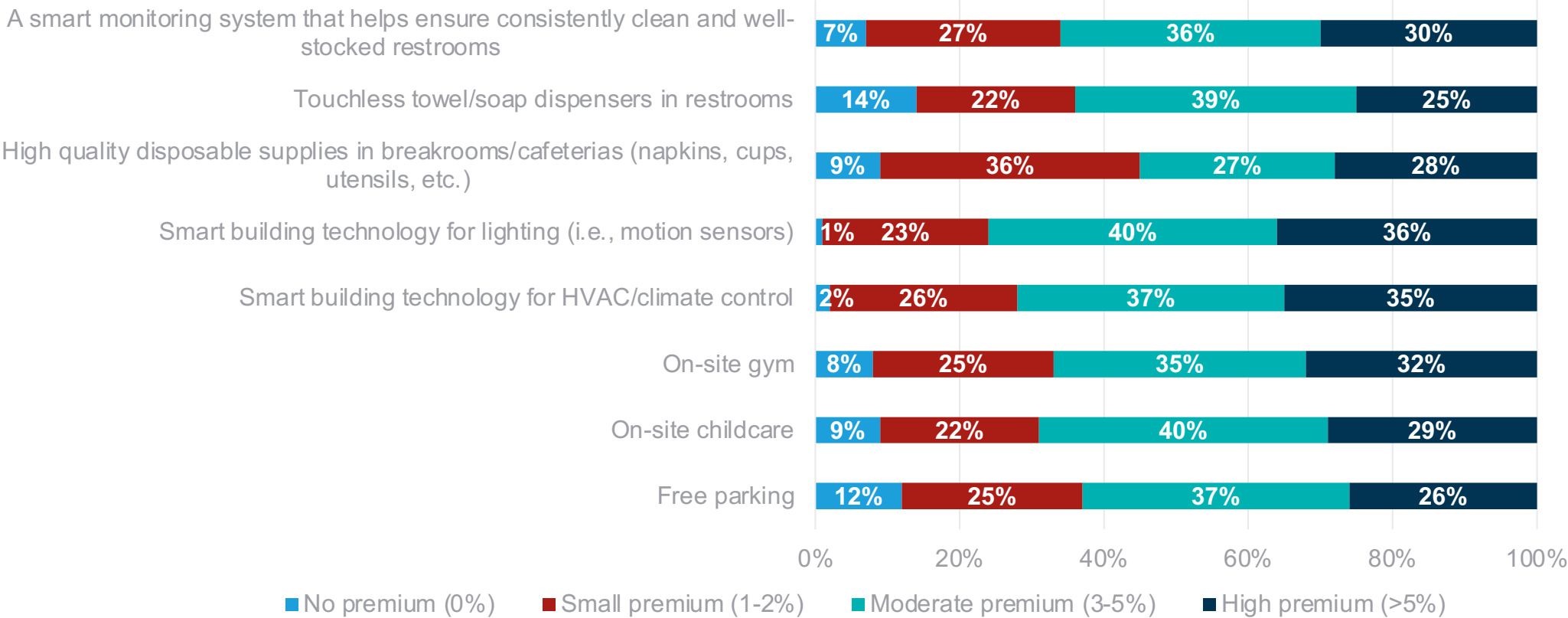


Q14: Which, if any, of the following do you feel improves or could improve tenant satisfaction with their space?
Base: Property Management Professionals, n=103



Consistent with perceived importance, 93% of property management professionals feel “a smart monitoring system that helps ensure consistently clean and well-stocked restrooms” warrants some premium over base rent. **Two-thirds (66%) put that premium at or above 3%.**

Perceived Value of Building Elements/Amenities to Tenants ABOVE Base Rent According to PMs

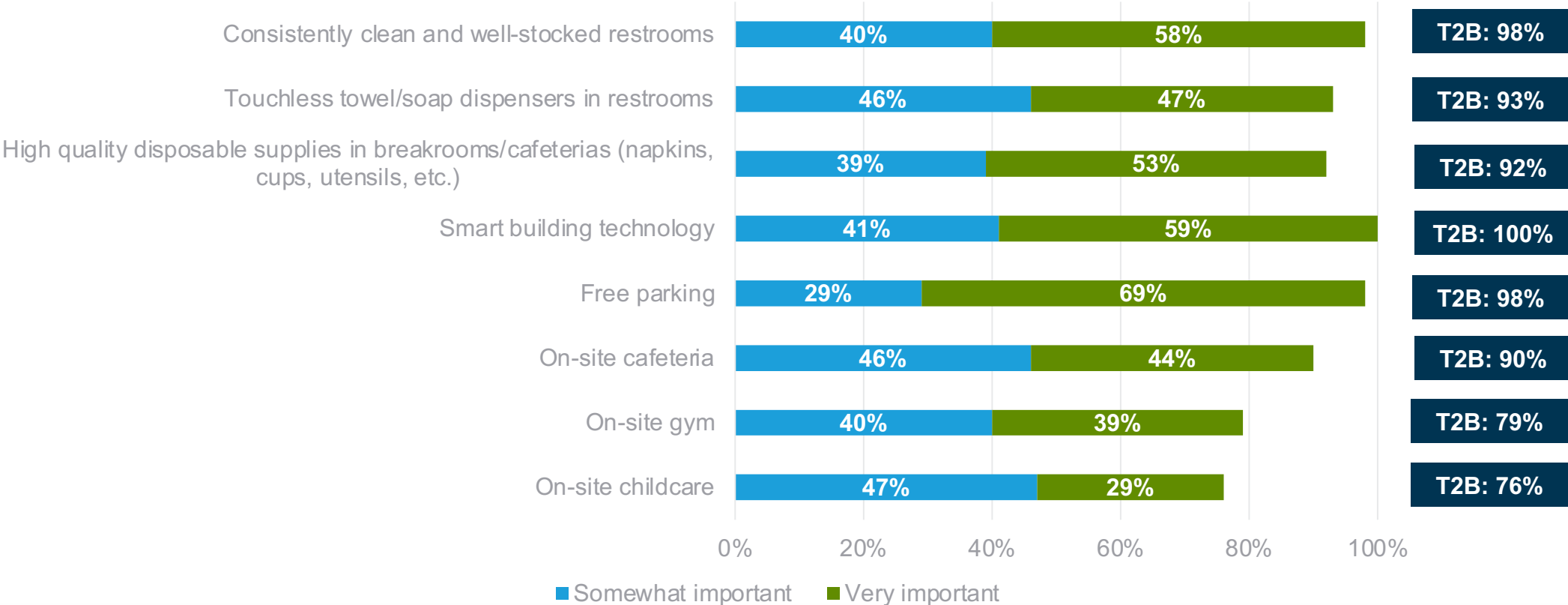


Q15: Thinking about the BASE rent or cost per square foot for space in the types of buildings you manage, how much of a premium, if any, are the following amenities worth to a tenant?
 Base: Property Management Professionals, n=103



Most (98%) of commercial real estate brokers say “clean and well stocked restrooms” is **important to clients** (and **58% say it is “very important”**). This is among the top three most important factors (edged out only by “smart building technology” at 100% T2B and tied with “free parking” at 98% T2B).

Importance of Building Elements / Amenities For Clients Seeking Space to Purchase or Lease – **COMMERCIAL REAL ESTATE BROKERS**

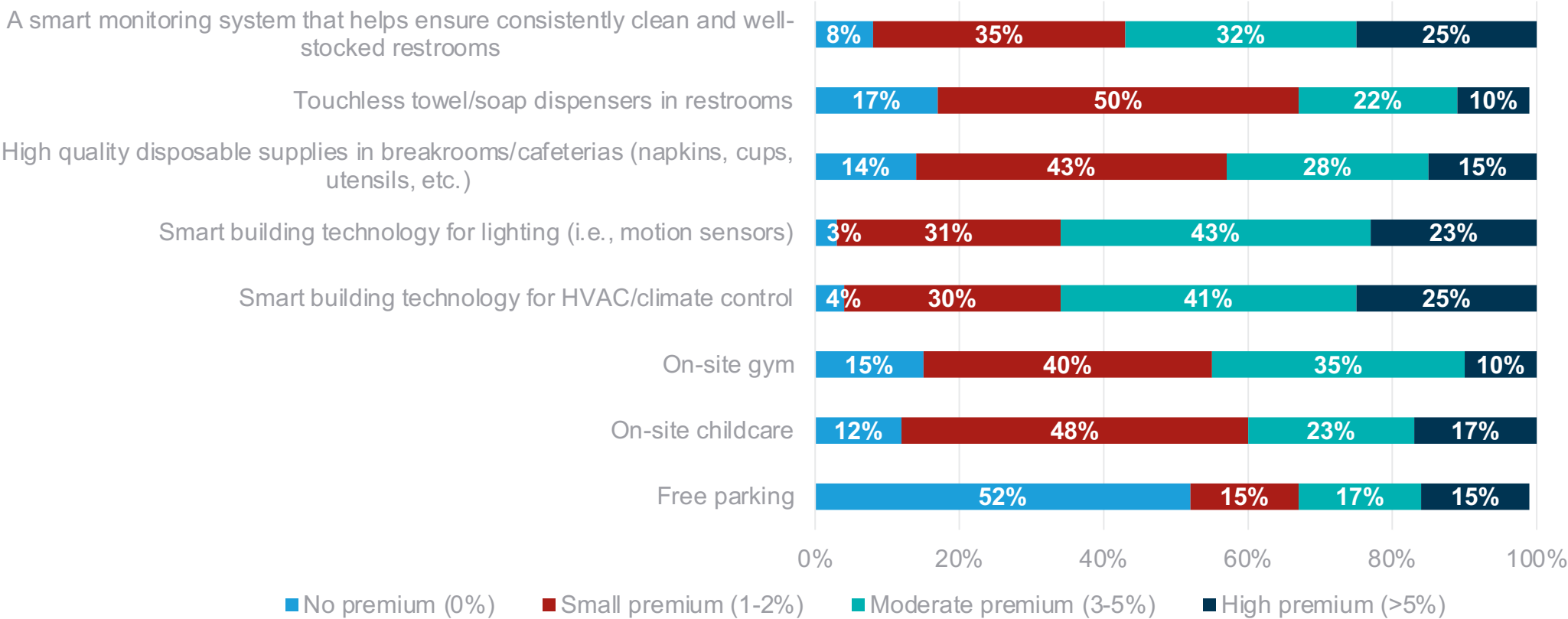


Q16: When working with a commercial client seeking to purchase a building or lease space, typically how important are the following elements and amenities?
 Base: Commercial Real Estate Brokers, n=105



Noting that 93% of commercial real estate brokers say “clean and well stocked restrooms” is important to clients, it is not surprising that **most (92%) believe a smart monitoring system that helps ensure such is worth some premium above base rent**. More than half (57%) believe a premium of 3% or more is justified.

Perceived Value of Building Elements/Amenities to Clients ABOVE Base Rent According to Commercial RE Brokers

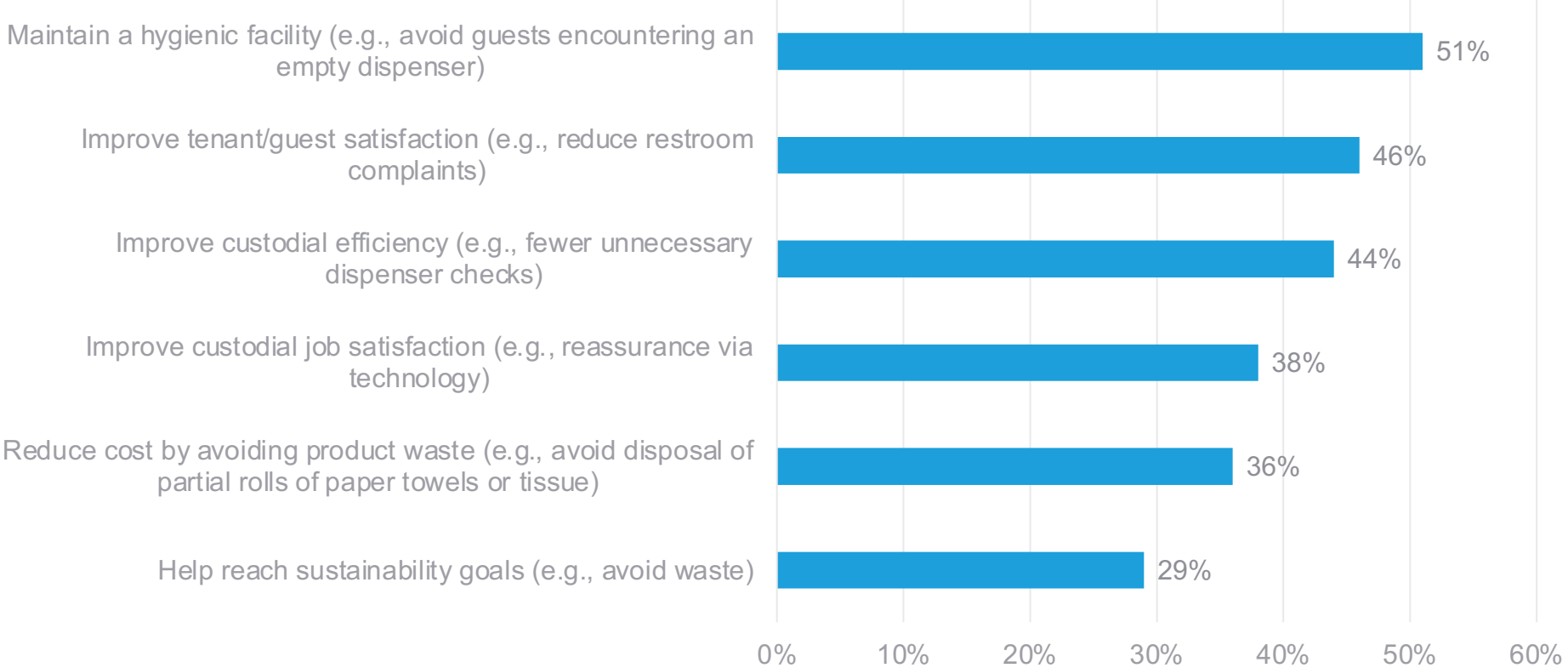


Q17: For a building where you might secure space for a client, how much of a premium, if any, over a typical BASE RENT, are the following amenities worth?
 Base: Commercial Real Estate Brokers, n=105



After being introduced to the KOLO Smart Monitoring System in the context of the survey (description and dashboard images), **half (51%) identify “maintaining a hygienic facility” as one of the most important benefits KOLO could provide.** For 46%, the benefit of “improved guest/tenant satisfaction” resonates.

Most Important Benefits KOLO Could Provide

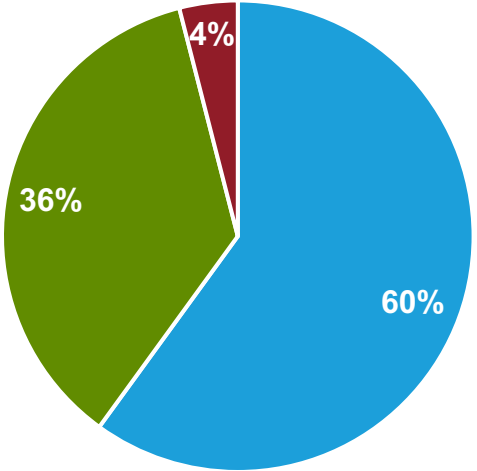


Q22: Which, if any, of the following do you believe are the most important benefits the KOLO Smart Monitoring System could provide?
Base: ALL - Property Management Professionals and Commercial Real Estate Brokers, n=208



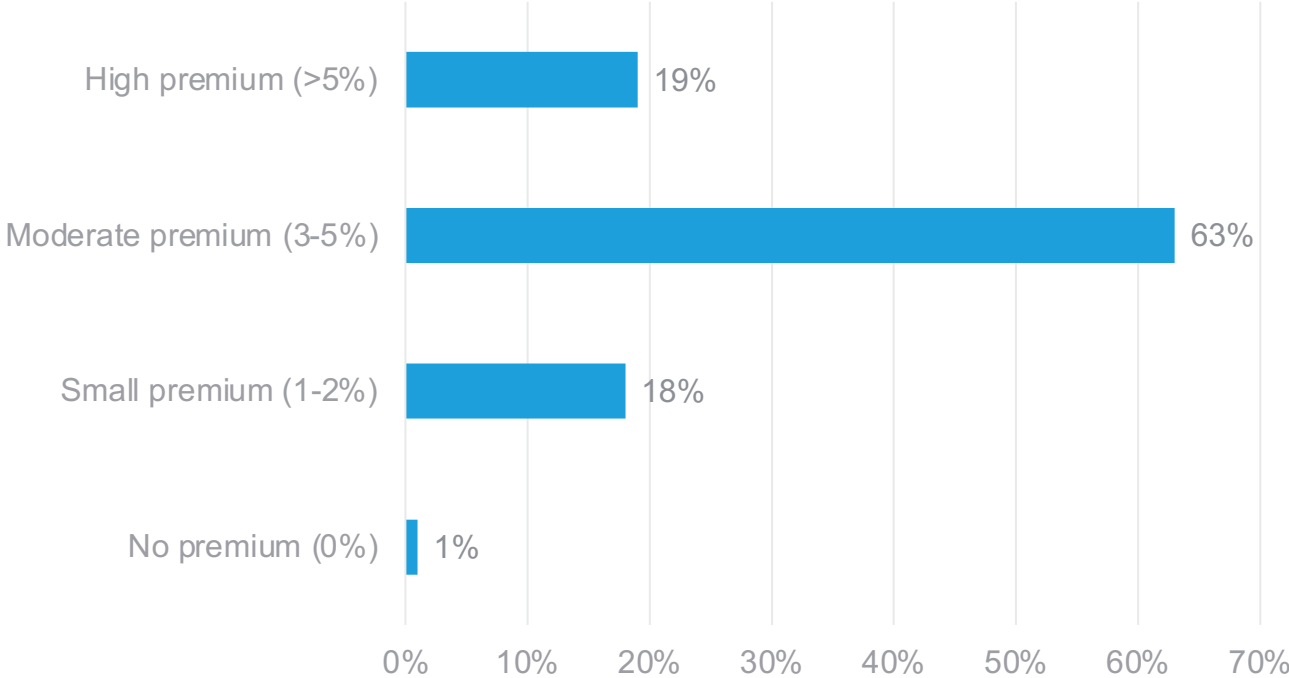
After being introduced to the KOLO Smart Monitoring System in the context of the survey (description and dashboard images), 96% agree that KOLO can have an impact on restroom conditions. **Nearly all (99%) of respondents believe a building offering KOLO warrants some premium above base rent, with almost 2/3 of respondents (63%) indicating a premium of 3-5% is warranted.**

Agreement that KOLO Can Help Ensure Consistently Clean and Well-Stocked Restrooms



■ Strongly agree ■ Somewhat agree ■ Neutral

Perceived Value of the KOLO Smart Monitoring System to a Building ABOVE Base Rent According to PMs and Commercial RE Brokers



Q23: How strongly do you agree or disagree that the KOLO Smart Monitoring System can help ensure consistently clean and well-stocked restrooms?
Q24: Thinking again about BASE rent or cost per square foot for building space, how much of a premium, if any, is this worth if a building utilizes the KOLO Smart Monitoring System for restroom maintenance? Base: ALL - Property Management Professionals and Commercial Real Estate Brokers, n=208