

COVID-19 COMMERCIAL IMPACT

August - October Nationwide COVID-19 Impact Study
N=3,010 Respondents (Office Space Decision-Makers/Influencers)
Selected Survey Insights

November 12, 2020



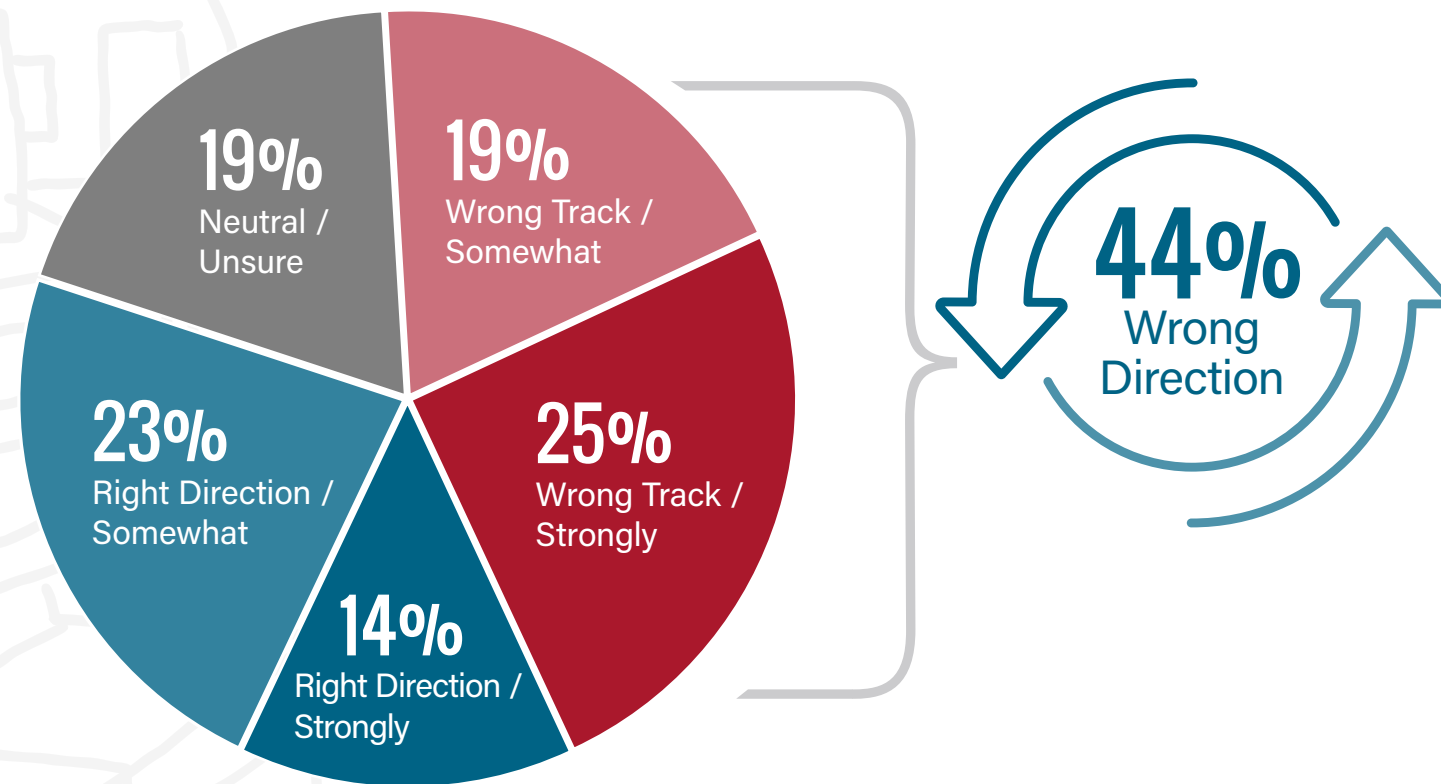
TENANT IMPACTS - ENVIRONMENTAL DYNAMICS



DIRECTION OF CORONAVIRUS RESPONSE AND PAIN POINTS

- Tenant decision-makers are quite polarized on the direction of the country on handling coronavirus, with a slim plurality "wrong track" (44%) vs. "right direction" (37%). There's little regional variance in direction of the country, but the retail industry, health care and real estate tend to be most pessimistic.
- Top challenges for tenant decision-makers include keeping BD pipelines active, workers engaged and supporting company cultures, creating opportunities for commercial office owners-operators to build bridges with tenants on the issues that matter most to them.

Direction of Country on Handling Coronavirus



Top Challenges for Tenants' Experience w/ Coronavirus

Tier 1	Keeping BD Pipelines Active	Keeping Teleworkers Effective / Engaged	Maintaining Culture & Connectivity
Tier 2	Getting "Facts Straight" Around Reopening	Professional Development Despite Separation	Convincing Employees to Return to Safe Offices
Tier 3	Navigating Cybersecurity Challenges	Understanding Options for Gov't Assistance (e.g., PPP)	Keeping Up w/ Bills from Vendors & Suppliers

Q: "Thinking about the coronavirus/COVID-19 public health emergency in general, do you believe as a country things are heading in the right direction, down the wrong track, or do you feel neutral?"