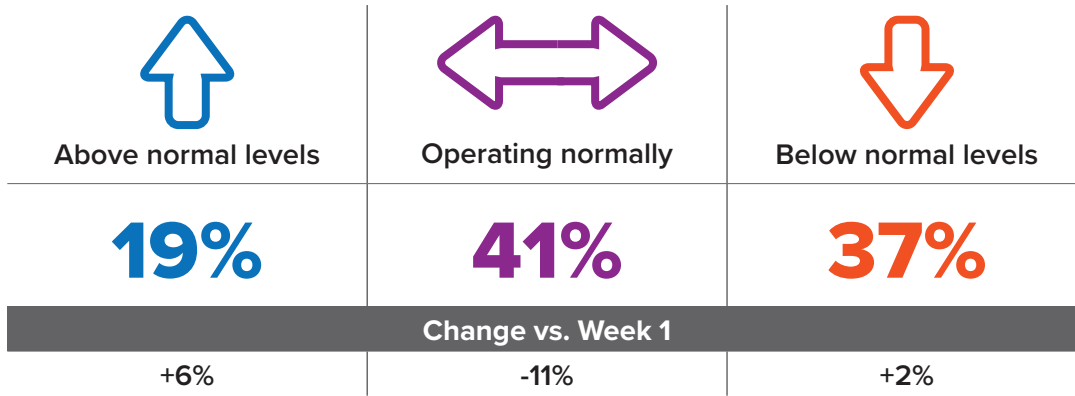


Status of Operations Due to COVID-19



“For IT it’s almost business as usual. Our stores and supply chain—busier than normal.”

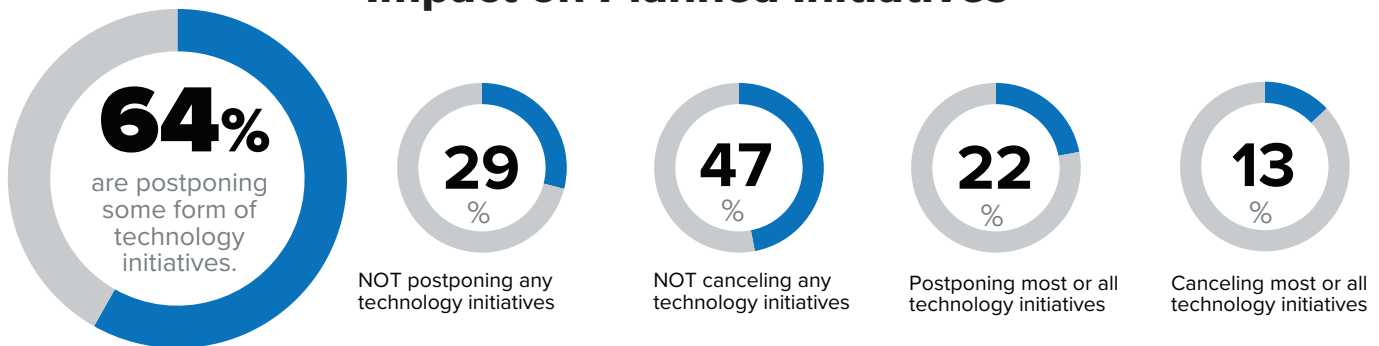
Majority (55%) are experiencing a shift in spending due to COVID-19.

“We have a directive to stop all orders, new contracts, and put some of our projects into a state of “pause” to be postponed to start again in the future. (Or possibly cancel depending how long this goes on.) We are a global company and largely affected by this situation.”

Shifts in Spending

- **Reduce Spending**
Preserve cash
- **Changing Project Status**
Canceling or postponing
- **Reduce Spending**
Preserve cash
- **Travel Suspensions**
For health and cost concerns
- **Enabling Work from Home**
Required to maintain operations

Impact on Planned Initiatives



“We were planning to start a major five-year-plus project to consolidate multiple SAP instances into one HANA instance. We are saying for now that it would start in the September time frame, but it really could end up being canceled. We had developed an entire organization around it with new jobs.”

Based on 190 responses and 149 completes.

Statistically sound with a margin of error = +/- 6% at 95% confidence.