Understanding the Effects of COVID-19

WEEK 7

Fielded May 1, 2020  Fields Weekly on Friday

Status of Operations Due to COVID-19

<table>
<thead>
<tr>
<th></th>
<th>Above normal levels</th>
<th>Operating normally</th>
<th>Below normal levels</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>10%</td>
<td>51%</td>
<td>38%</td>
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Change vs. Week 6

|                                      | -8%                 | +6%               | -3%                 |

“We are being far more cautious with spending. While demand has sharply increased for our products, we understand there could be a drop coming. We also are putting more emphasis on team-member protection and development during these troubled times.”

61% of organizations are postponing some technology initiatives, including these examples.

Projects deemed unnecessary to the core business

SAP-related projects

Software/infrastructure upgrades

Planning the Return to Workplaces

More than 3 in 5 respondents say their organizations have discussed guidelines about returning to work and what it may look like.

Has your organization discussed any guidelines about returning to work and what that might look like?

- Yes 40%
- No 38%
- N/A 30%

Enforcing social distancing

Requiring face masks and personal protective equipment

Planning still underway

Splitting employee shifts

“All social distancing rules will apply. Face coverings will be required when outside of a personal office.”

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Based on a total of 885 responses and 700 completes Statistically sound with a margin of error = +/- 4% at 95% confidence.