

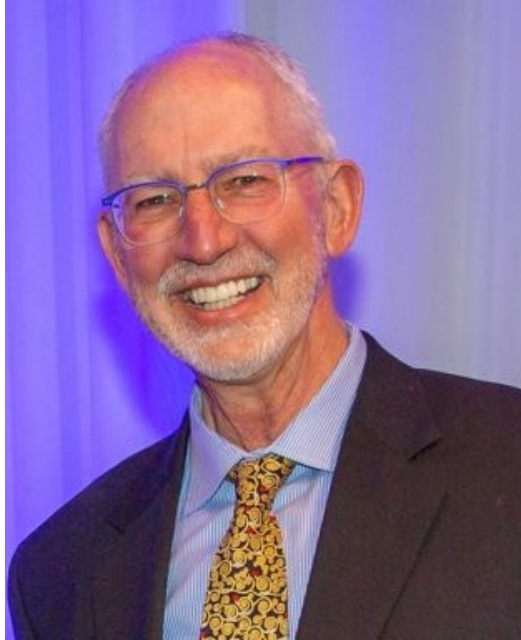


The Real Estate Response to COVID-19

Friday, March 27th, 10 am – 11:15 am



Opening remarks:



Michael Leccese
Executive Director
ULI Colorado

ULI's Response to continued COVID-19 Concerns

- ❑ Health and safety of our members, staff, and national and global networks are of utmost importance. We encourage everyone to follow the social and health protocols outlined by the Centers for Disease Control and Prevention (CDC): <https://www.cdc.gov/>
- ❑ ULI is going virtual. We will continue to do what we do best—convene, share best practices and educate. For upcoming webinars and other opportunities, go to: <https://colorado.uli.org/>.
- ❑ ULI's Toronto Spring Meeting has been cancelled and postponed in Toronto until 2023. Spring meeting 2021 will take place in Denver, CO. Go to uli.org for updates.
- ❑ ULI Colorado office(s) have also gone virtual, though our staff is always available via email or phone.
- ❑ Please be careful, safe and healthy as we all face this situation as a community.

Current Opportunities:

- ❑ **Construction Fundamentals for Development Professionals**
Webinar, Online Course, March 26th – 27th
Register here: <https://americas.uli.org/event/construction-fundamentals-for-development-professionals-3/>
- ❑ **Confronting COVID-19 Healthy Buildings – Optimizing Mental Health**
Free Webinar, March 31st, 1 pm – 2:15 pm ET
Register here: <https://americas.uli.org/event/webinar-confronting-covid-19-healthy-buildings-optimizing-mental-health>
- ❑ **Deal Sourcing and Preliminary Evaluation: A Primer, Real Estate Entrepreneur Webinar**
Webinar, Online Course, April 7th and 9th , 3 pm – 4:30 pm ET
Register here: <https://americas.uli.org/event/deal-sourcing-and-preliminary-evaluation-a-primer/>
- ❑ See upcoming local opportunities on ULI Colorado website here: <https://colorado.uli.org/events/>
- ❑ We've compiled the below list of resources to keep you informed on current impacts we're seeing as they pertain to real estate, the economy, and your business:
 - ❖ [*Confronting COVID-19: Social Distancing, Buildings, and Lessons from Asia*](#), ULI Asia Pacific
 - ❖ [*Checking Commercial Real Estate's Immunity: The Potential Implications of Coronavirus \(COVID-19\)*](#), Trepp Talk
 - ❖ [*COVID-19 Real Estate Impact: What Experts Say*](#)
 - ❖ [*COVID-19: Global Real Estate Implications*](#), JLL
 - ❖ [*Covid-19: Implications for EMEA Real Estate*](#), CBRE

We want to hear from you!

- ▶ ULI Colorado is conducting a survey of members to provide ongoing value virtually over the next few months! Please take a moment to contribute to the survey by **Friday, April 3rd** at this link:
- ▶ <https://uli-colorado.typeform.com/to/MUcqid>

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Summit



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Today's Moderator:



Mike Zoellner
Managing Partner
ZF Capital
Chair
ULI Colorado Executive Committee

Today's Agenda:

- ▶ **10:10 am – 10:15 am:** **Opening remarks and introductions**
Mike Zoellner, Managing Partner, ZF Capital, ULI Chair and moderator
- ▶ **10:15 am - 10:25 am:** **Emerging Trends *today***
Anita Kramer, Senior Vice President, ULI Center for Capital Markets and Real Estate
- ▶ **10:25 am – 11:05 am:** **The Real Estate Response to COVID-19**
Moderated conversation with panelists:
Anita Kramer (ULI Center for Capital Markets)
Bill Mosher (Trammell Crow Company)
Michael Gifford (AGC Colorado)
Paul Washington (JLL)
- ▶ **11:05 am – 11:15 am:** **Questions from participants using the “chat box”**
- ▶ **11:15 am:** **Closing**

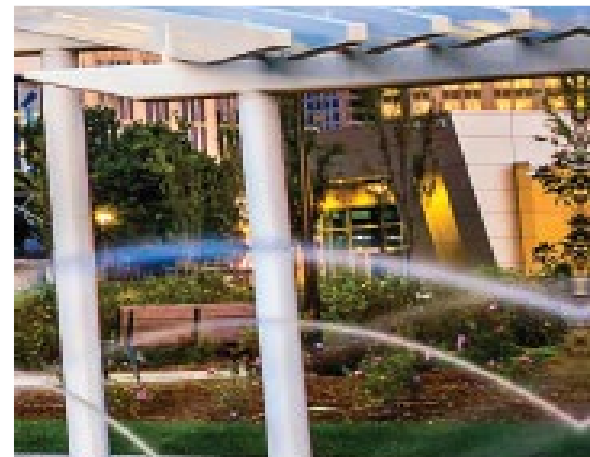
Emerging Trends *Today*



Anita Kramer
Senior Vice President
ULI Center for Capital Markets
and Real Estate

Emerging Trends in Real Estate 2020

October 2019





“Shifting focus
to the
decade ahead”





A Changing Map

Easing on Down the Road

The Siren Call of TINA

A New Menu for Markets

Hipsturbia





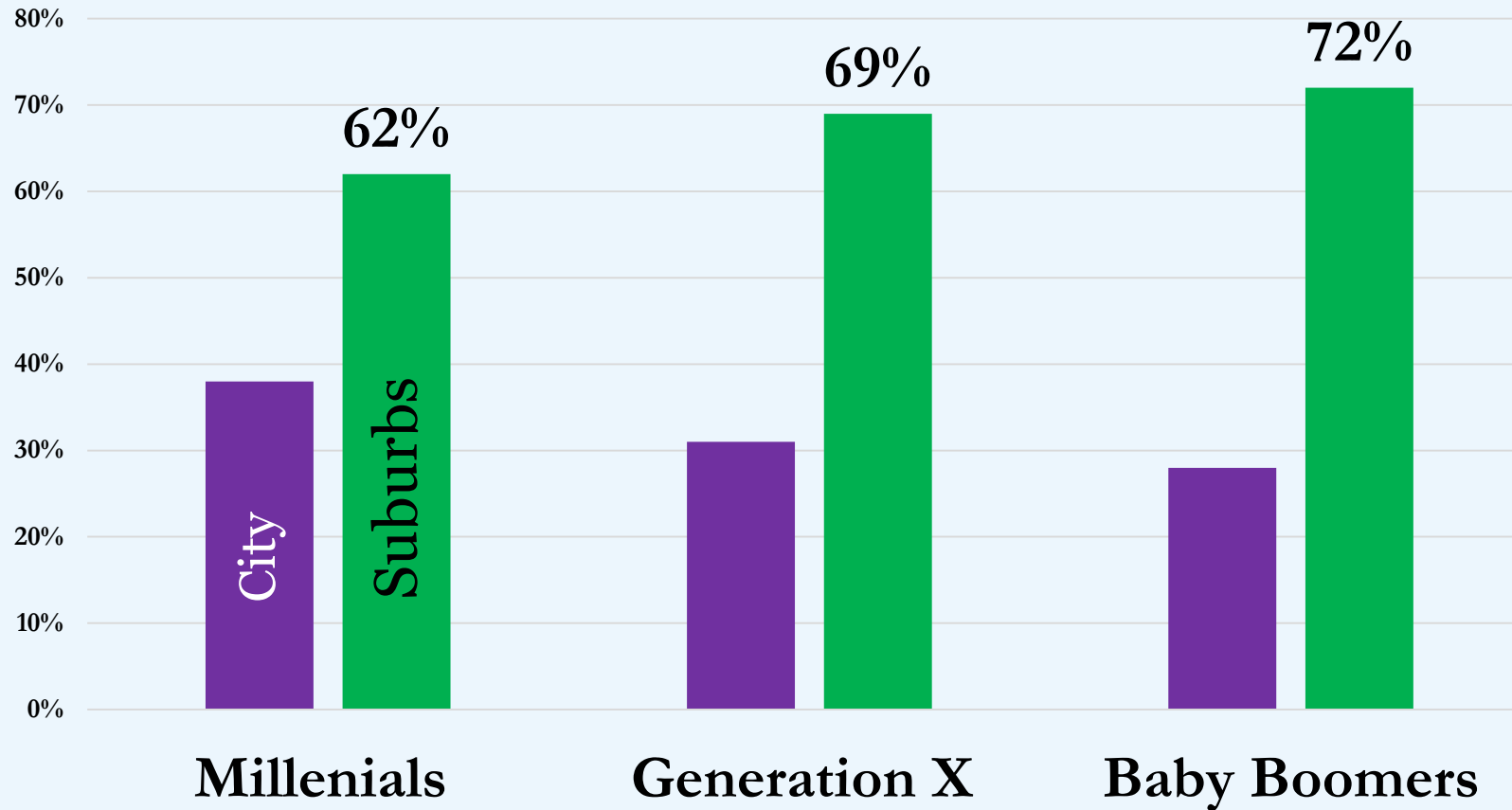
A Changing Map

“You can take the hipster out of the city,
but
you can’t take the microbrewery and bikeshare out of the hipster”

Hipsturbia



Where do People Currently Live (2018)?



Source: U.S. Census Bureau

Metropolitan Mobility, 2017-2018



Metropolitan Mobility By Generation, 2017-2018



Source: U.S. Census Bureau

“ Suburbs are
becoming cool
again

But.....

“You can’t be a
suburb of nowhere”





A Changing Industry

Housing: The Great Unraveling

A Community State of Mind

Boomers and Beyond

ESG: A Sustainable Trend



“Searching
for a feeling
of place”





Dealing with Disruption



March of Technology

Infrastructure



March of Technology

“”Make the whole equal > than the sum of the parts”

- Collaboration

- Facilitation

It's just amazing how quickly we've gone from

‘That’s a question that the **research department has to handle**’ to

‘I’ll choose from a menu of my entire portfolio **on my iphone**’.



The Real Estate Response to COVID-19



Michael Gifford
President & CEO
Associated General
Contractors
(AGC) Colorado



Anita Kramer
Senior Vice President
ULI Center
for Capital Markets
and Real Estate



Bill Mosher
Senior Managing Director
Trammell Crow Company



Paul Washington
Market Director
JLL Denver



Moderated by:
Mike Zoellner
Managing Partner
ZF Capital
Chair
ULI Colorado
Executive Committee

What has surprised you the most in the
past 30 days?

The Real Estate Response to COVID-19



Michael Gifford
President & CEO
Associated General
Contractors
(AGC) Colorado



Anita Kramer
Senior Vice President
ULI Center
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Which segments of our industry will be most impacted by this shutdown/recession?

The Real Estate Response to COVID-19



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President & CEO
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None of us know the timing of when a turnaround will begin, but where will the phase 1 opportunities be most compelling?

The Real Estate Response to COVID-19



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Have a question for the panel?

Please type in your question in the “chat box” feature of Zoom. At 11 am, we will begin selecting questions from the chat box and our panel will address them.

Thank you!

THANK YOU!

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We're here to help!



Michael Leccese
Executive Director



Sarah Franklin
Director



Marianne Eppig
Director



Elise Martinez
Associate