

# PANDEMIC TO POSSIBILITY



# RETHINKING AND RECONFIGURING HEALTHCARE, OFFICE, AND RETAIL SPACE AMID THE PANDEMIC

NOVEMBER 19TH, 2020

# SPEAKERS

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# HEALTHCARE

WHERE WE'VE BEEN AND WHAT WE'RE SEEING NOW

# HEALTHCARE / WHERE WE'VE BEEN

- HEAVILY REGULATED
- FOCUSED ON PATIENT EXPERIENCE
- MINIMAL BARRIER BETWEEN PATIENT AND STAFF
- OPEN BUILDING ACCESS, MINIMAL BARRIER TO ENTRY
- MINIMAL ROOM SIGNAGE
- UNREGULATED/UNSPECIFIED CLEANING SPECS
- NO PATIENT SCREENING AREA AT BUILDING/SUITE ENTRY
- INADEQUATE STAFF AREA
- LARGE WAITING ROOMS

FIG 04-1: CMS



FIG 04-2: OIG



FIG 04-3: HEALTHCARE SNAPSHOTS



FIG 04-5: ISHN



# HEALTHCARE /

## WHAT WE'RE SEEING NOW

- RELAXED STATE AND FEDERAL REGULATIONS
- ALL ABOUT PATIENT AND STAFF SAFETY
- PAPER SIGNS WITH TAPE
- TEMPORARY PLEXIGLASS BARRIERS INSTALLED
- TEMPORARY TENTS SET UP OUTSIDE AS SCREENING AREAS
- TEMPORARY DESK SETUP IN HALLWAY AS SCREENING STATIONS
- CDC CLEANING SPECS ESTABLISHED
- BUILDING ACCESS CONTROLS IN PLACE
- PRE-CHECK-IN AT OFFICE, WAIT IN CAR UNTIL CALLED

FIG 05-1: ASRS



FIG 05-2: USA TODAY



FIG 05-3: NASP



FIG 05-4: TIME MAGAZINE

# OFFICE

WHERE WE'VE BEEN AND WHAT WE'RE SEEING NOW



# OFFICE /

WHERE WE'VE BEEN AND WHAT WE'RE SEEING NOW

THE PANDEMIC HAS BEEN A DISRUPTIVE FORCE IN THE OFFICE MARKET, IMPACTING BOTH OFFICE USERS AND LANDLORDS.

- ONE LAW FIRM'S PANDEMIC EXPERIENCE
- OFFICE REAL ESTATE INVESTMENT TRUST (REIT) INVESTMENT PERFORMANCE
- IMPACT ON OFFICE RELATIVE TO OTHER COMMERCIAL REAL ESTATE (CRE) SECTORS
- UNCERTAINTY ABOUT LONG TERM IMPACT





# RETAIL

WHERE WE'VE BEEN AND WHAT WE'RE SEEING NOW

# RETAIL /

## WHERE WE'VE BEEN

- STRUGGLING TO ADAPT = DECLINE OF MALLS
- OVER RETAILED
- LEVERAGED BUYOUT = MASSIVE DEBT
- CONSUMER EXPERIENCE



FIG 09-1: DAILY MAIL



FIG 10-1: RIS NEWS

# RETAIL / WHAT WE'RE SEEING NOW

- COVID-19 RESISTANT CATEGORIES



GROCERY



GENERAL  
MERCHANDISE



HOME  
IMPROVEMENT



PET SUPPLIES

- STRUGGLING CATEGORIES



RESTAURANTS



CLOTHING &  
ACCESSORIES



FURNITURE &  
FURNISHINGS

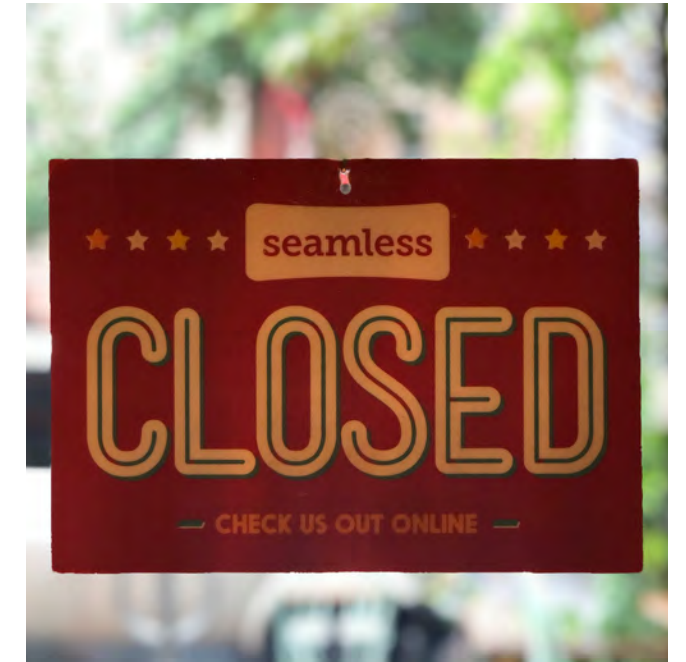


FIG 10-3: WALMART

# HEALTHCARE

POSSIBLE OUTCOMES



# HEALTHCARE /

## POSSIBLE OUTCOMES

- FEDERAL AND STATE GUIDELINES TO FIRM BACK TO PRE-COVID LEVELS OVER TIME
- BALANCE BETWEEN PATIENT / STAFF SAFETY AND PATIENT SATISFACTION / EXPERIENCE
- BUILDINGS WITH ACCESS BARRIERS FOR TEMPERATURE CHECKS AND WELLNESS SCREENING
- WIDER HALLWAYS FOR SCREENING ALCOVES
- ENHANCED EXAM ROOM & DOOR SIGNAGE
- ESTABLISHED CLEANING SPECIFICATIONS AND STANDARDS INDUSTRY WIDE
- STAFF AND PATIENT SCREENING STATIONS/ALCOVES AT CLINIC CHECK-IN IS HERE TO STAY
- AUTOMATED CHECK-IN

FIG 12-1: KCBA ARCHITECTS



FIG 12-2: FORMATION



FIG 12-3: THE EVERETT CLINIC

# OFFICE

POSSIBLE OUTCOMES



# OFFICE / POSSIBLE OUTCOMES

IMPACT ON THE CONFIGURATION AND DEMAND FOR OFFICE SPACE.

- LONG TERM DEMAND AND TRENDS
- SHORT TERM IMPACT OF PANDEMIC
- HR IMPLICATIONS OF WFH
- EXPERIENTIAL OFFICE SPACE, AMENITIES AND ATTRACTING WORKERS BACK TO THE OFFICE
- NEED FOR GREATER FLEXIBILITY
- SUBURBAN VS. URBAN MARKETS

FIG 14-1: WEWORK



FIG 14-2: MAT OFFICE

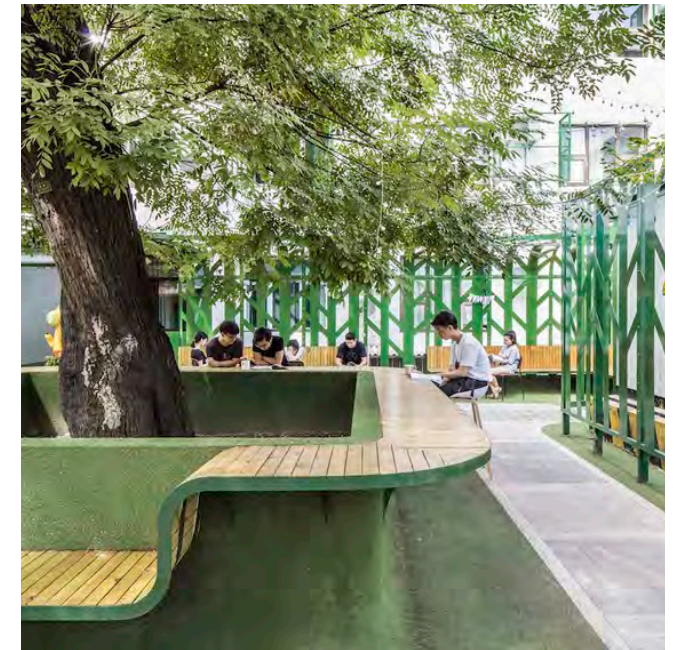


FIG 14-3: WEWORK



FIG 14-4: COWORKING RESOURCES



# OFFICE / POSSIBLE OUTCOMES

WHAT WILL BE THE NET/NET IMPACT ON TOTAL DEMAND FOR OFFICE SPACE.

- DOWNWARD PRESSURE
- UPWARD PRESSURE
- NET EFFECT

FIG 15-1: MAZEN STUDIO



FIG 15-2: SCHRIMMER DESIGN GROUP

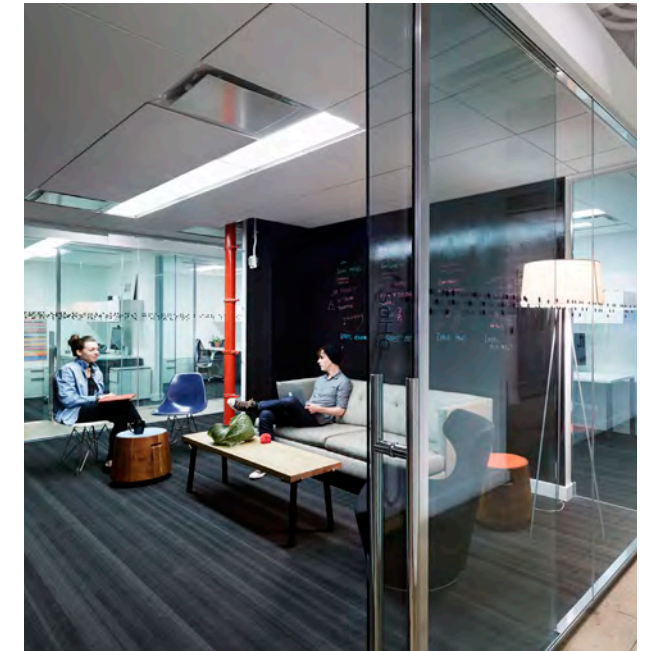


FIG 15-3: WEWORK



# RETAIL

POSSIBLE OUTCOMES

# RETAIL /

## POSSIBLE OUTCOMES

- CASUALIZATION OF CLOTHING
- FEWER OCCASIONS
- OUTDOOR SPACE = HEALTHY
- DRIVE-THRUS MORE IMPORTANT & VALUABLE THAN EVER
- CURBSIDE PICK-UP CHANGING THE LANDSCAPE OF PARKING LOTS WITHIN SHOPPING CENTERS
- ECONOMICS OF SPREADING OUT DINING AREAS

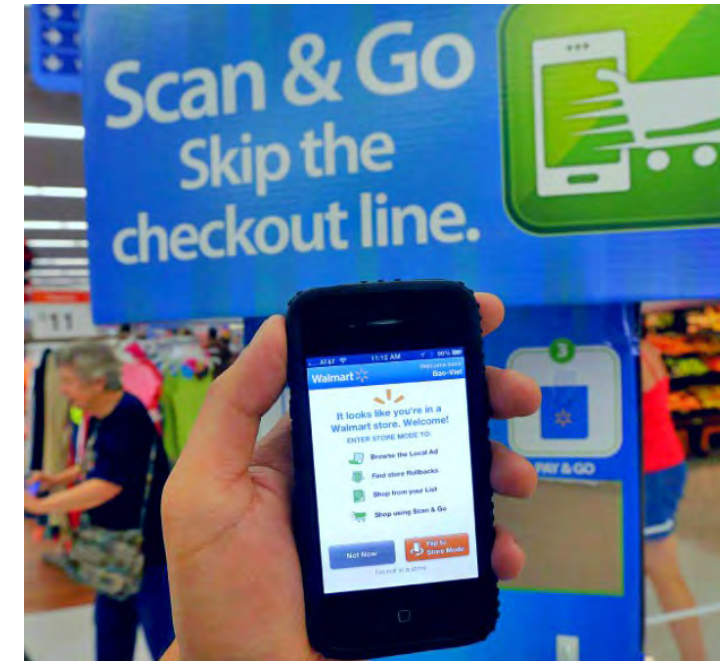


FIG 17-2: QSR

# QUESTIONS?

**PANDEMIC TO  
POSSIBILITY**



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