



>> Kingsley Associates

Q2 2011 Industry Trends - Office

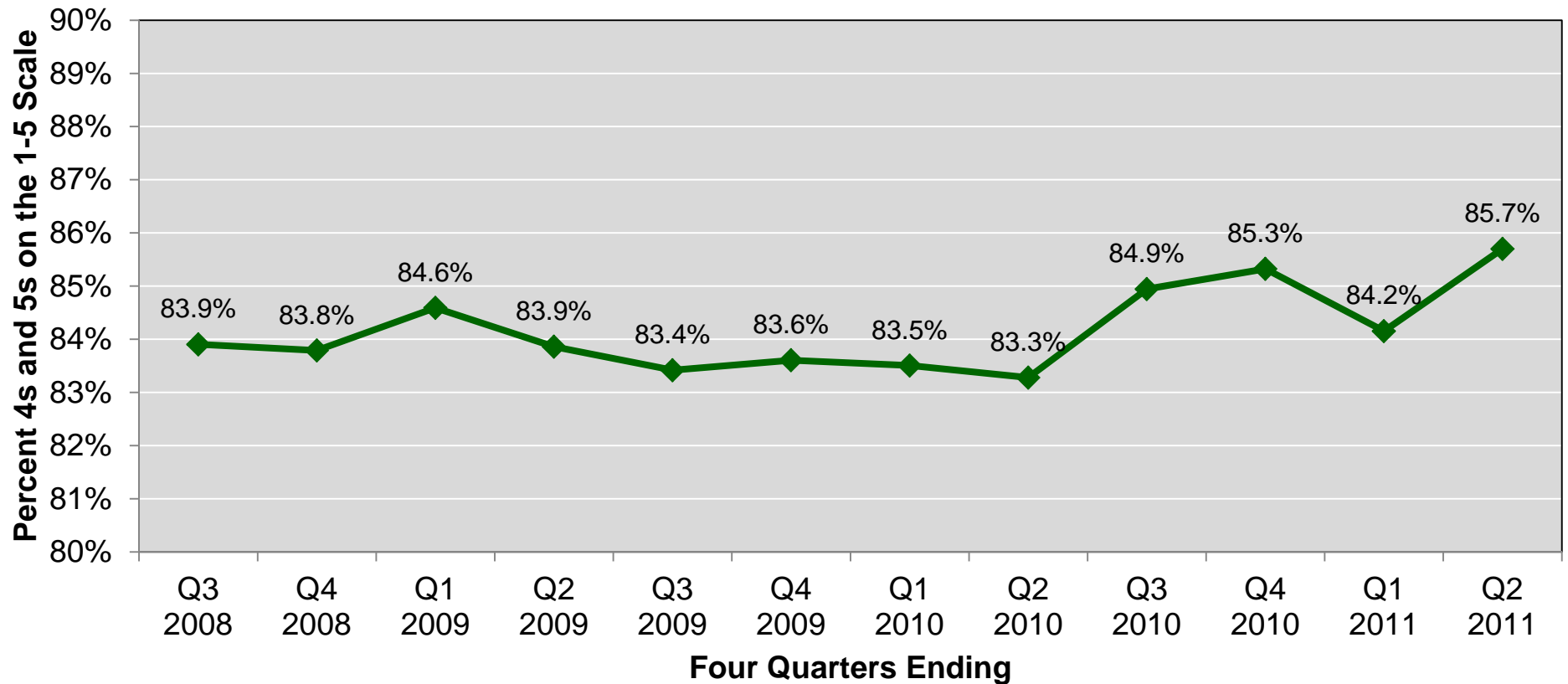
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Peggy Robinson, Vice President of Marketing
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>> Overall Tenant Satisfaction



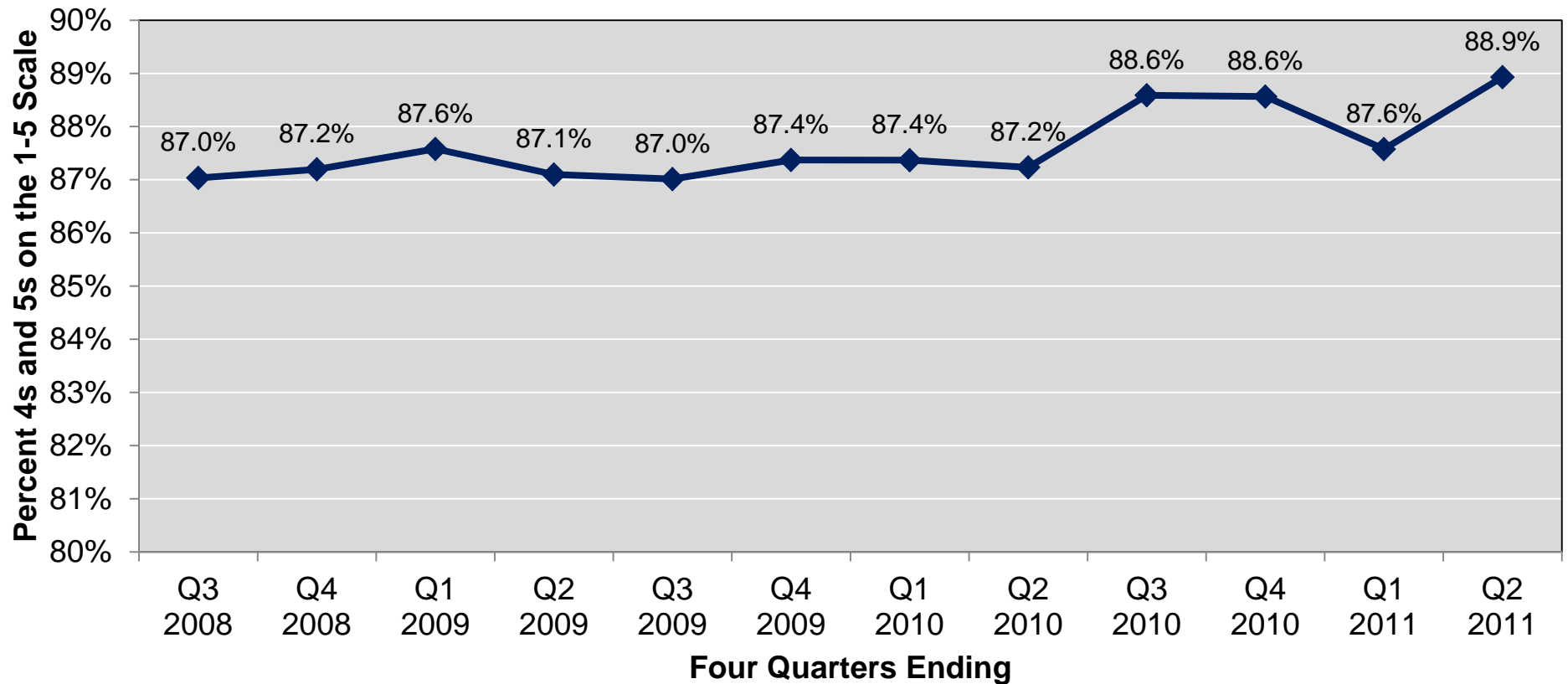
Source: Kingsley IndexSM, office properties nationally

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>> Satisfaction with Property Management



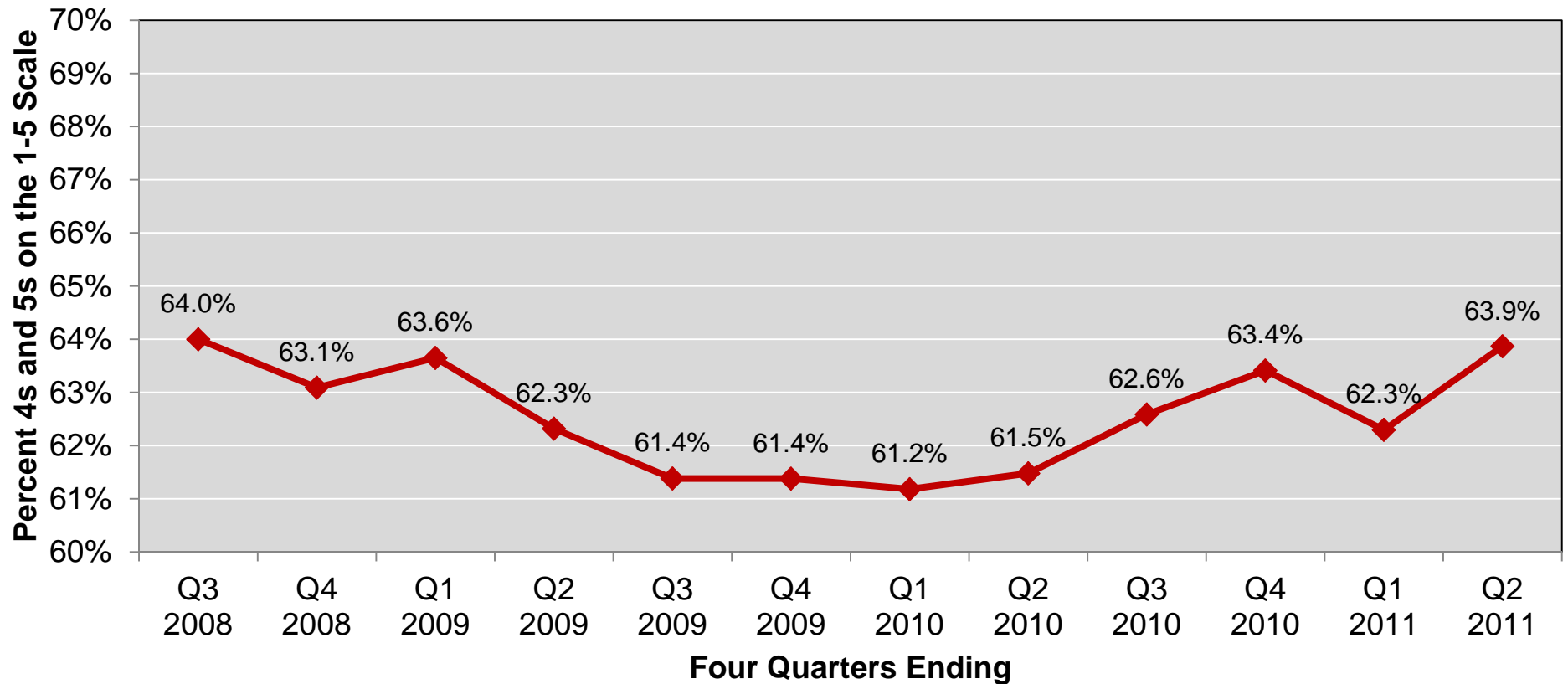
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>> Value for Amount Paid



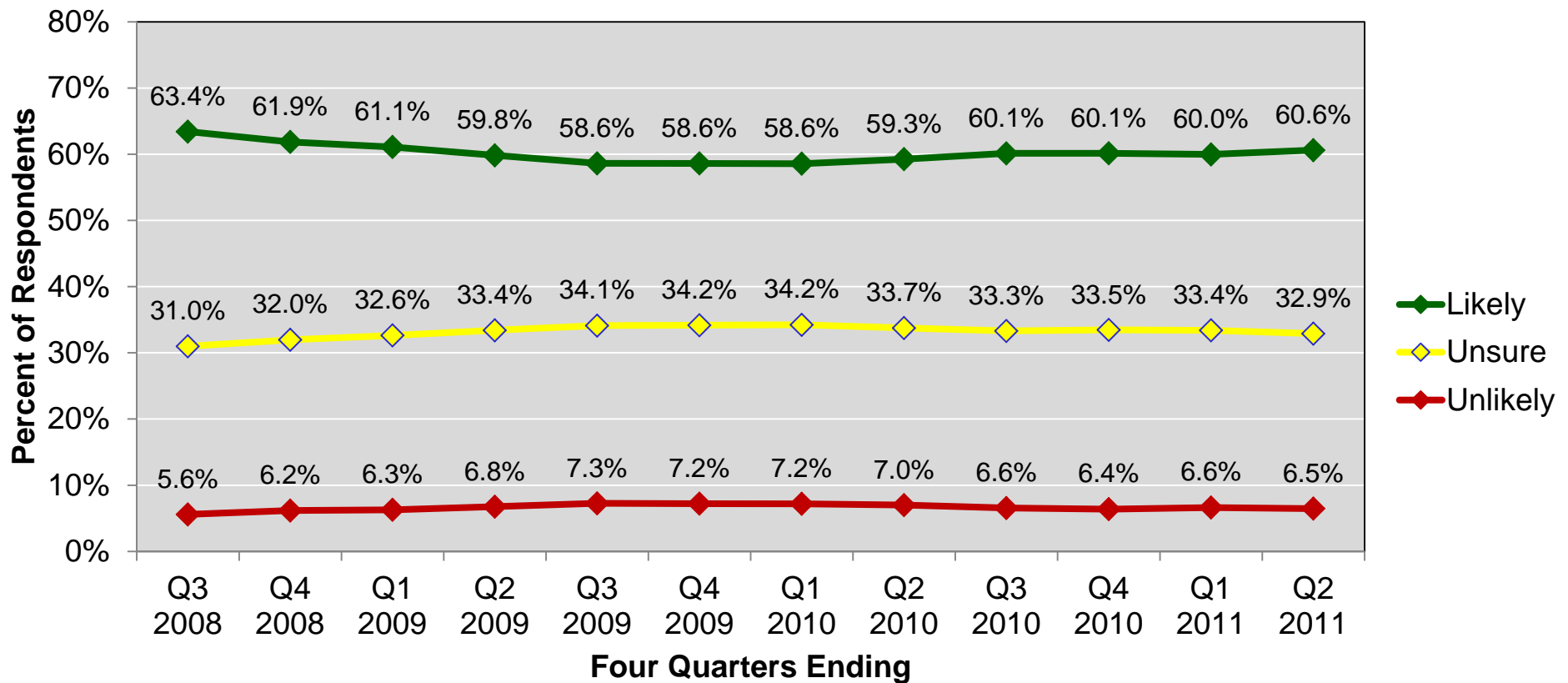
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>> Renewal Intent



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>> Renewal Decision Factors

Decision Factor	Percent of Tenants UNLIKELY to Renew
Price	45.1%
Space requirements	30.2%
Corporate decision	26.3%
Business circumstances	23.3%

Decision Factor	Percent of Tenants UNSURE of Renewal
Price	48.7%
Corporate decision	37.5%
Space requirements	26.8%
Business circumstances	21.7%

Decision Factor	Percent of Tenants LIKELY to Renew
Location	82.0%
Quality of building	48.9%
Space requirements	42.4%
Property management	40.7%

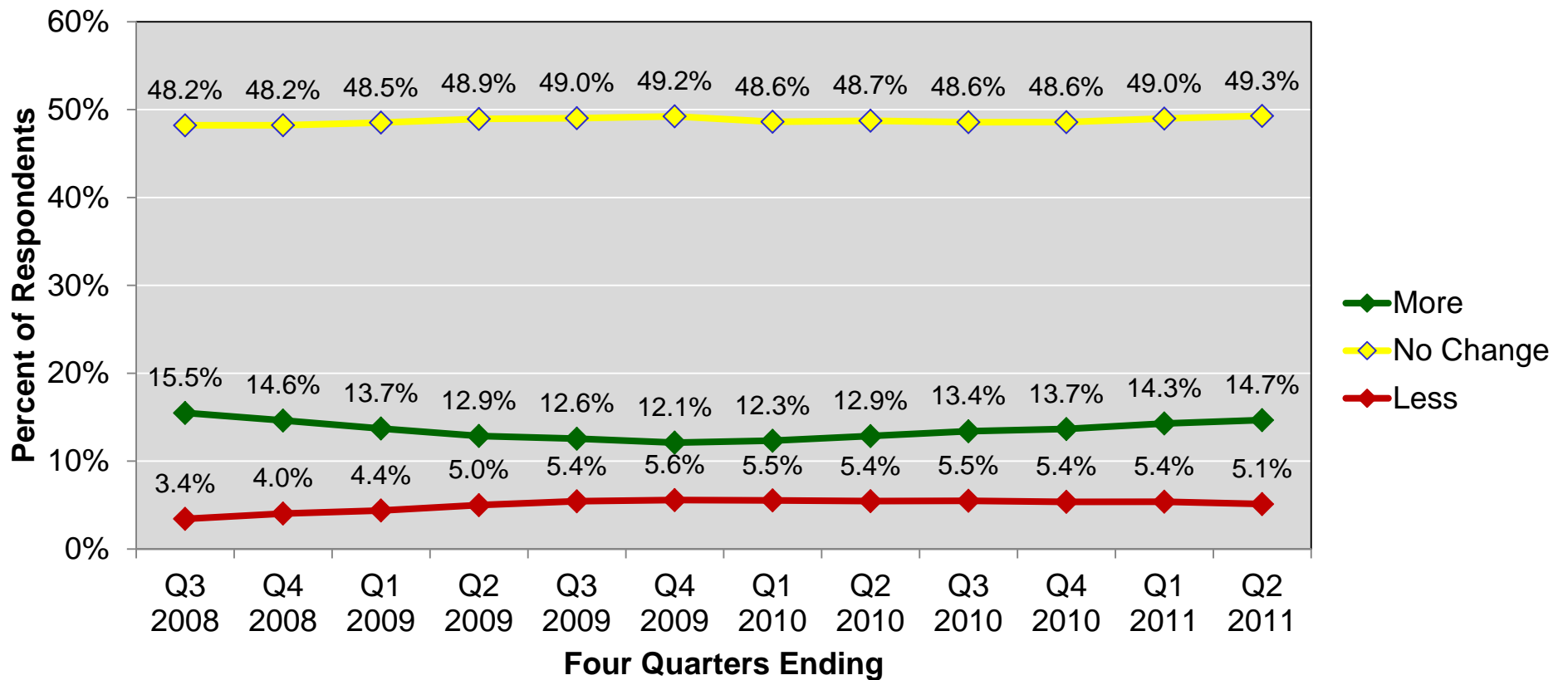
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>> Future Space Needs



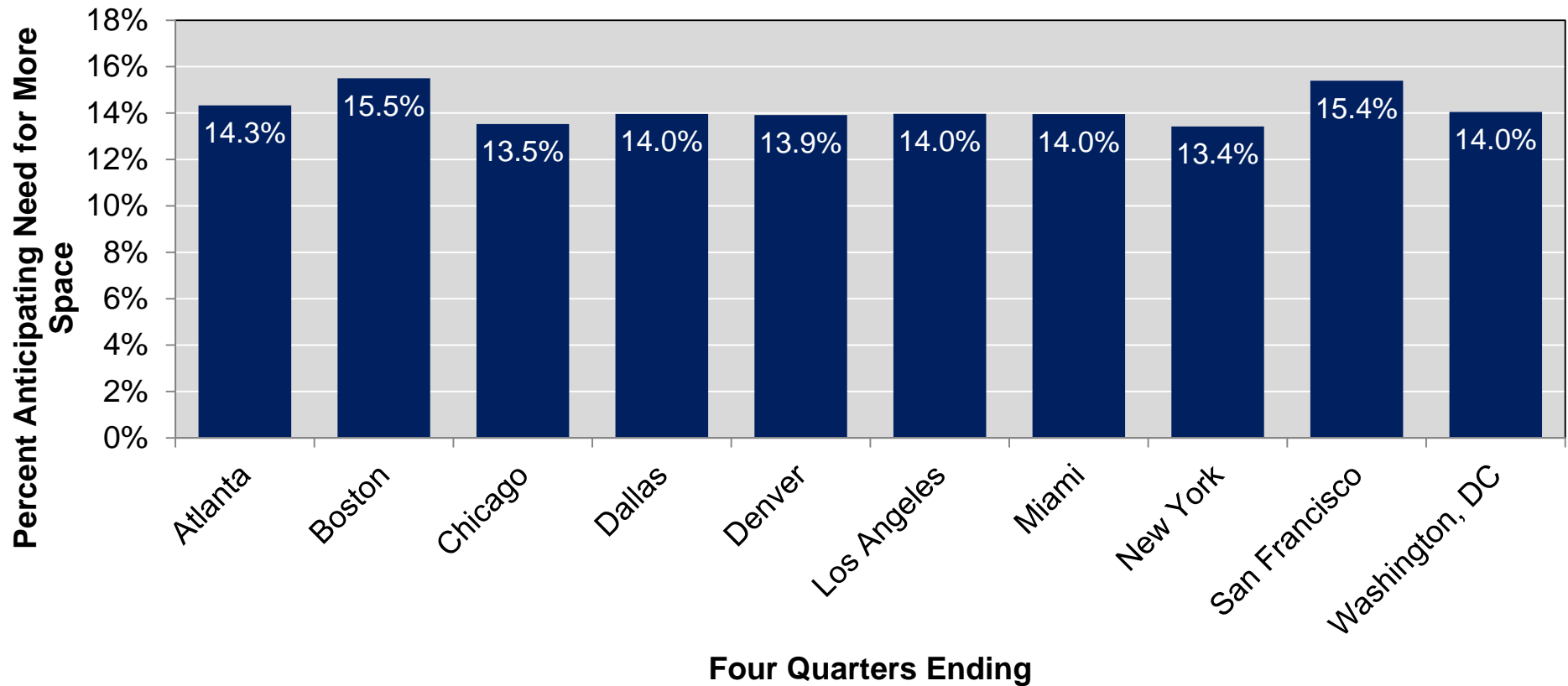
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>> Future Space Needs by Market



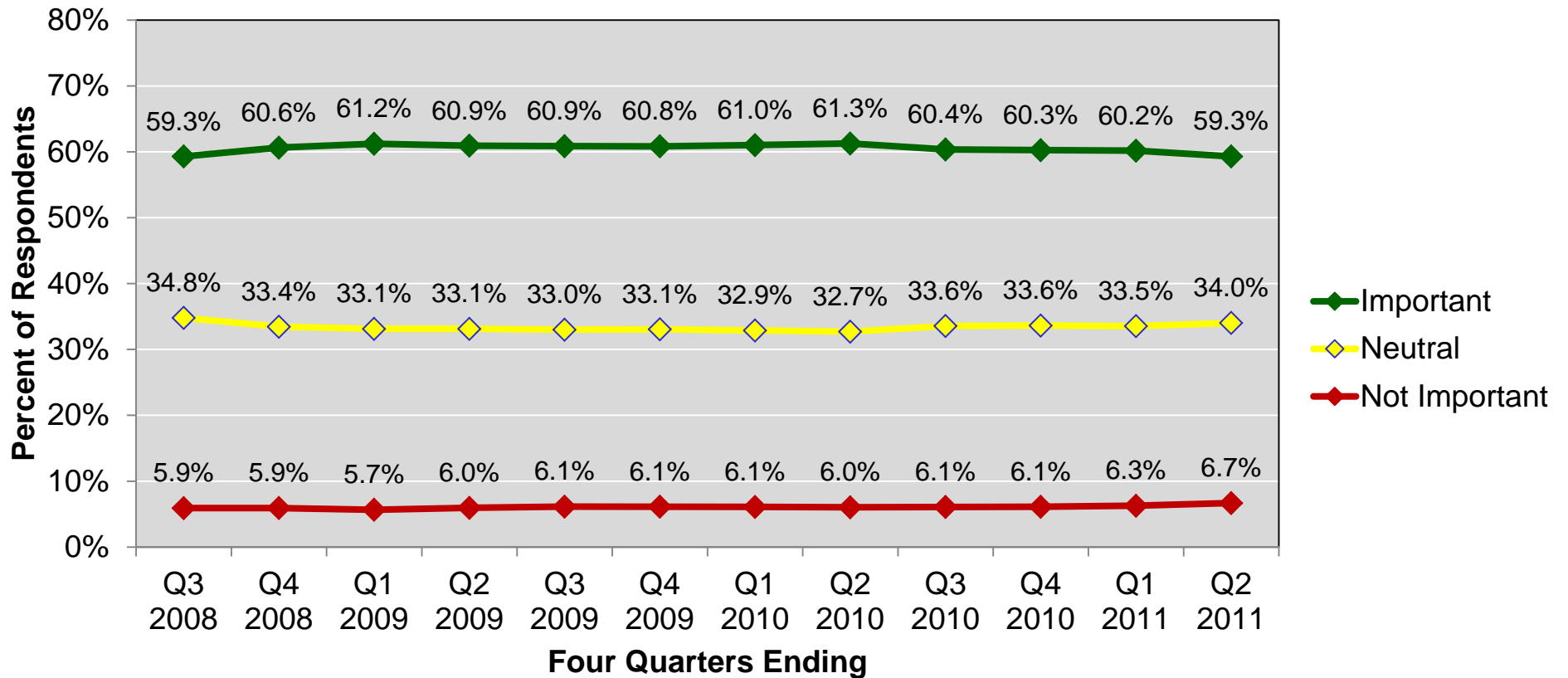
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>> Importance of Green Building Practices



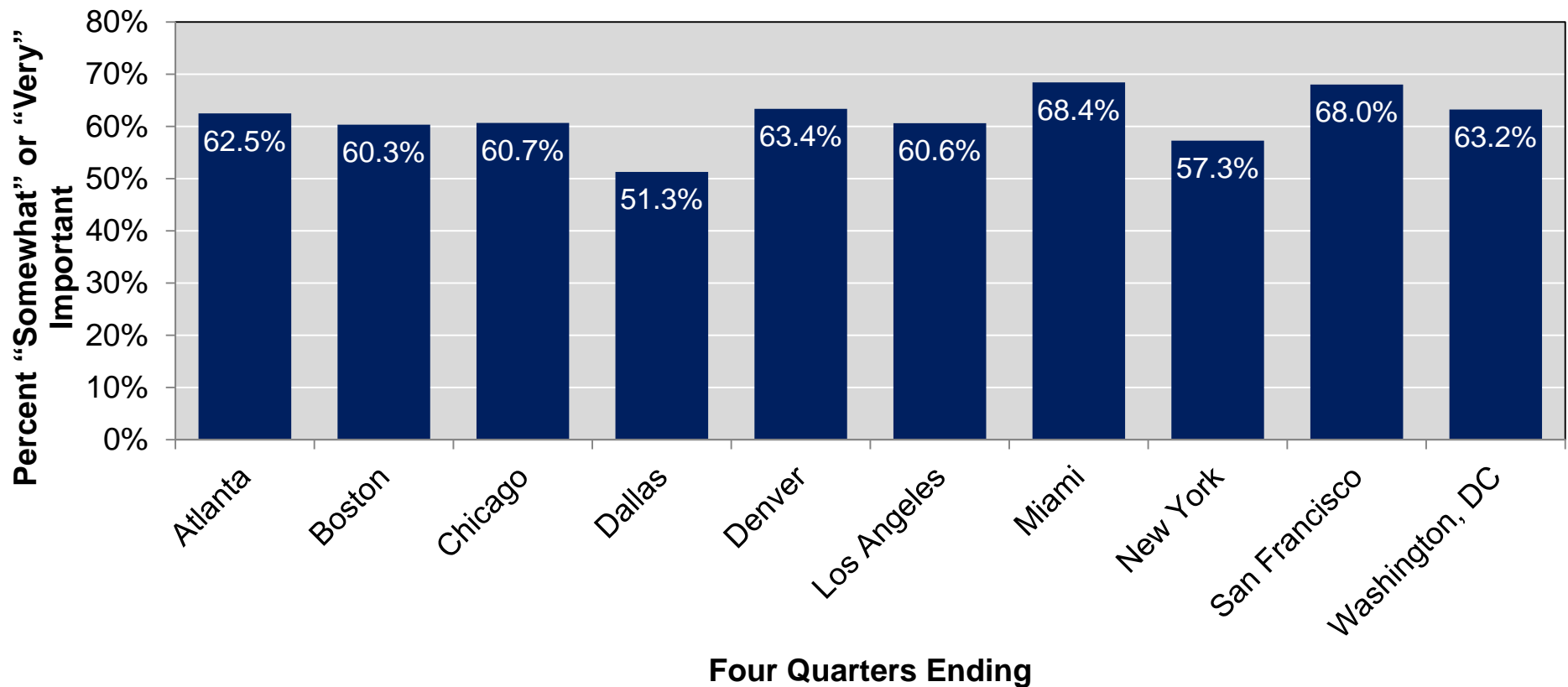
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>> Importance of Green by Market



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- Fund structuring and fee benchmarking
- Portfolio performance scorecards
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