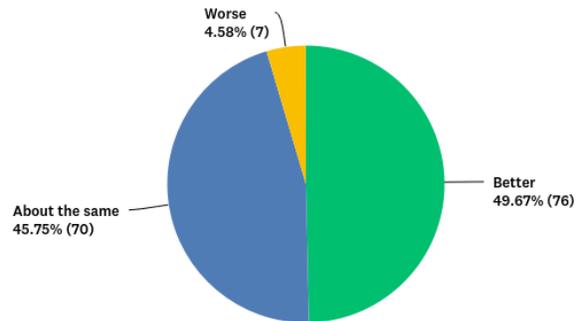


HIGHLIGHTS OF THE 6TH ANNUAL 495/METROWEST EMPLOYER SURVEY & FORECAST

2018 Results Indicate Stable Optimism/Expect Increases in Hiring & Revenues

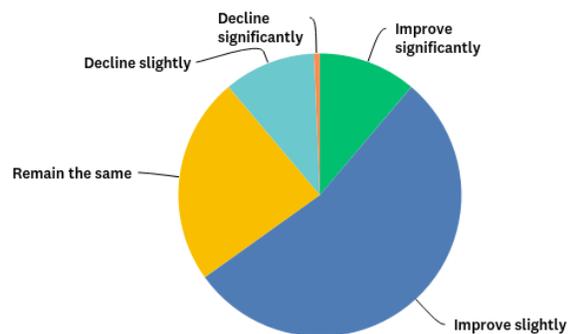
Business conditions in the 495/MetroWest region - better or worse than they were a year ago?

- 49.7% say Better (54% in 2017)
- 46% say About the Same as last year
- 4.6% say Worse than last year



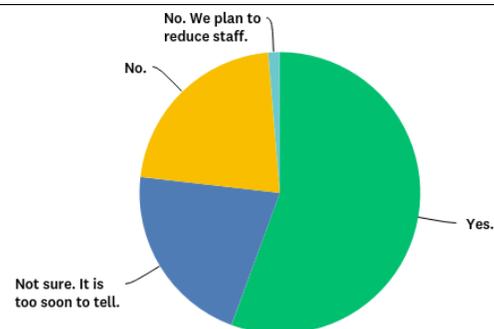
Over the course of the coming year how will the economy in the 495/MetroWest region do?

- 11% say Improve significantly
- 54% say Improve slightly
- 11% say Decline slightly
- .66% (1response) Decline significantly



Over the course of the coming year do you expect to hire additional staff in the 495/MetroWest region?

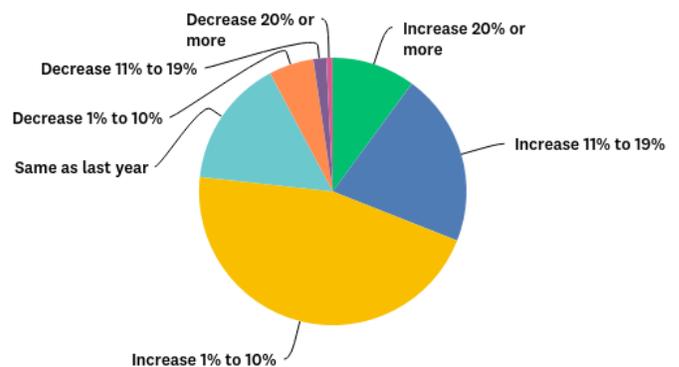
- Yes- 56%
- Up from 48% in 2017
- Up from 41% in 2016
- Up from 32% in 2014
- Up from 29% in 2013



Compared to the previous year what are your expectations for your organization's revenue performance this year?

Slightly higher expectations compared to 2017 building from increases in 2016

- 77% expect revenue increases
- 10% expect increases of 20% or more
- 21% expect increases of 11%-19%
- 46% expect increases of 1%-10%
- 8% expect revenues to decrease (similar to 2017)



HIGHLIGHTS OF THE 6TH ANNUAL 495/METROWEST EMPLOYER SURVEY & FORECAST (cont.)

<p>How have global tariff changes enacted in 2017 impacted your organization? <i>New question in 2018</i></p> <ul style="list-style-type: none"> • 55% say No impact • 14% say Slight negative impact • 9% say Moderate negative impact • 12% say Don't know • 7% combined say positive impact 	
<p>How important is each of following for attracting employees for your 495/MetroWest office(s)? <i>New Question in 2017: Top 3 same in 2018 w/Community Service #3</i></p>	<p>Highlighting the organization's:</p> <ul style="list-style-type: none"> • Benefits package (55%) • Community Service (30%) • Socially responsible programs (30%) <i>(Very important)</i>
<p>What best describes the reason for locating your business in the 495/MetroWest region? <i>Top 3 same as 2017 w/Labor Quality #2</i></p>	<ul style="list-style-type: none"> • Proximity to clients • Affordability of real estate • Labor quality
<p>Thinking specifically of Commuter Rail, what are your biggest concerns? <i>New question for 2018</i></p>	<ul style="list-style-type: none"> • Reliability/On-time performance • Frequency of trains to Boston • Parking / First-last mile connections (tied for 3rd)
<h3>Challenges facing the Region</h3>	
<p>What is the single most important challenge in the 495/MetroWest region facing your business today? <i>HC & Labor quality stay in the top 3; Labor costs new entry at the top</i></p>	<ul style="list-style-type: none"> • Labor quality (skills gap of applicants) • Healthcare costs • Labor costs
<p>Rank the following 495/MetroWest area transportation needs in order of importance <i>Results similar to 2016 & 2017</i></p>	<ul style="list-style-type: none"> • Access to highway infrastructure • Relieving Highway congestion • Access to Commuter Rail
<p>In order for your organization to expand in the 495/MetroWest Region you need: <i>New Question in 2017</i></p>	