

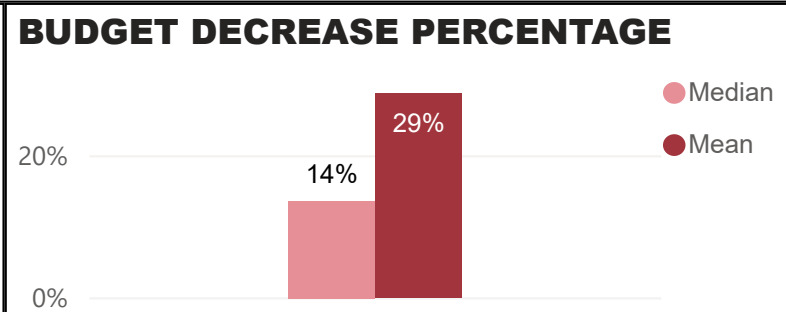
AEC INDUSTRY OUTLOOK & RESPONSE TO COVID-19 PANDEMIC

This document contains data gathered by voluntary respondents to a survey administered by Zweig Group on 3/12/20. Updates to these results will be provided as necessary to account for the fluidity of this situation.

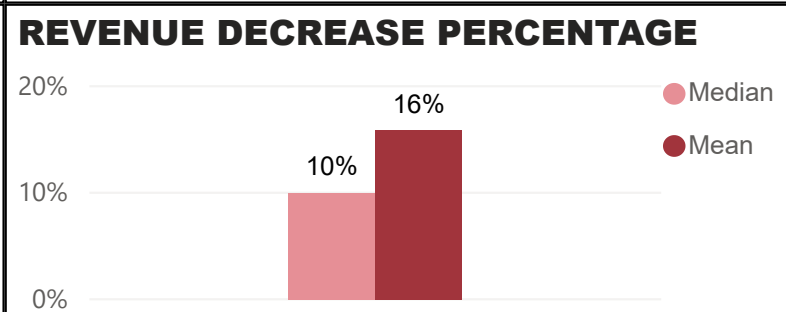
Please contact research@zweiggroup.com for further information.

IMPACT ON TRAVEL POLICIES	%
Business travel is to be conducted on a case-by-case basis	48%
All business travel has been suspended	19%
No impact	17%
Voluntary business travel has been suspended	7%
Other	5%
Business travel is limited to or prohibited from certain locations	4%

IMPACT ON BUDGET	%
My firm is considering changes to the 2020 budget	52%
No changes have been made to my firm's 2020 budget and none are currently planned	45%
My firm has altered the 2020 budget due to COVID-19	3%



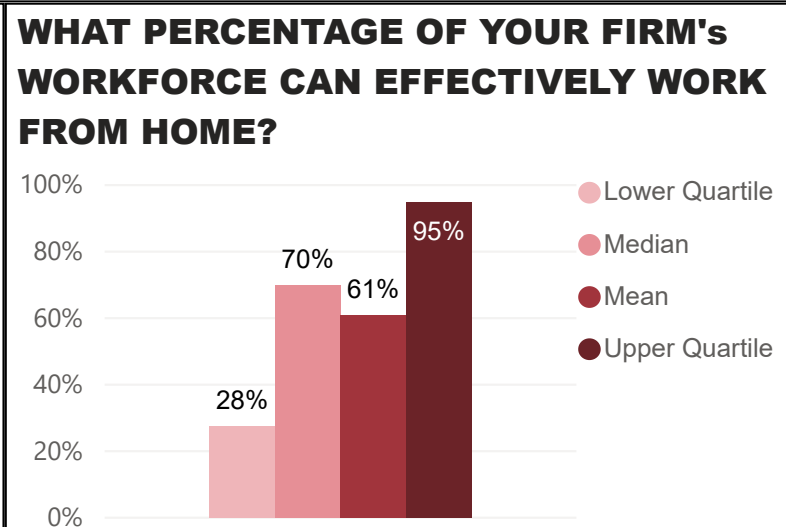
IMPACT ON REVENUE	%
The impacts of COVID-19 will likely cause a decrease in my firm's revenue by this percentage compared to the previous year	63%
COVID-19 will not likely impact my firm's revenue in any way	37%



IMPACT ON EDUCATIONAL EVENTS & TRAINING	%
My firm supports employees individual decisions to not attend events or trainings but has not issued a change to formal policy	35%
Employees at my firm are not allowed to attend business conferences and trainings	26%
Business conferences and trainings are approved on a case-by-case basis	20%
No changes have occurred to my firm's policy on educational events and trainings	16%
Other	4%

IMPACT ON CLIENT ENTERTAINMENT & NETWORKING	%
My firm supports the decision of employees to refrain from public networking but has not issued a formal policy	54%
No change	21%
My firm has mandated that employees refrain from entertaining clients in social public settings (restaurants/bars/events)	20%
My firm is considering asking employees to refrain from entertaining clients in social public settings (restaurants/bars/events)	3%
Other	1%

IMPACT ON TELECOMMUTING & WORKING REMOTELY	%
COVID-19 has changed my firm's policy on telecommuting to allow any employee to telecommute at any time.	29%
My firm allows for telecommuting for certain employees and has not changed its policies in response to COVID-19.	22%
COVID-19 has changed my firm's policy on telecommuting to allow only certain employees to telecommute currently.	18%
My firm allows for any employees to telecommute at any time and has not changed its policies in response to COVID-19.	18%
My firm does not allow for telecommuting and has not changed its policies in response to COVID-19.	12%



IMPACT ON DISCRETIONARY SPENDING**%**

No changes have been made to my firm's 2020 discretionary spending and none are currently planned	47%
My firm is considering devoting discretionary spending to challenges created by COVID-19	33%
My firm has suspended all discretionary spending	11%
My firm has devoted discretionary spending to challenges created by COVID-19	8%
Other	2%

CANCELLED OR DELAYED PROJECTS**%**

No projects have been cancelled and we do not anticipate cancellations or delays	46%
We have not yet cancelled or delayed a project, but are considering it	26%
Clients have cancelled or delayed a project	25%
Yes, my firm has cancelled or delayed a project	8%

INVESTMENTS IN RESPONSE TO COVID-19**%**

We have not made any significant investments	67%
We have hired additional cleaning services	27%
Other	9%
We have hired outside contingency consultants	3%

IMPACT ON PERSONAL TRAVEL**%**

I've stopped all non-essential personal travel	46%
I'm avoiding travel to certain locations	21%
No impact	17%
I'm not planning on traveling outside of the country	17%
I'm not planning on traveling outside of my immediate town/city	8%
Other	7%
I'm not planning on traveling outside of my state	5%
I'm not planning on leaving my home	3%
I've stopped all personal travel but am traveling for business	3%
My firm has asked me to refrain from personal travel	3%

RATE THE FOLLOWING IN TERMS OF IMPACT ON A 1 TO 5 SCALE WITH 5 BEING A HIGHLY NEGATIVE IMPACT**RATING**

Ability to obtain new work	2.2
Ability to collaborate with subcontractors / consultants on projects	2.1
Ability to find qualified staff	1.9
Collection period / Accounts receivable	1.9
Ability to train staff	1.9
Ability to collaborate internally on projects	1.9
Ability to finish current projects on time	1.8
Ability to finish current projects within budget	1.7
Ability to provide high quality service and response to clients	1.7

HOW DO YOU ANTICIPATE SPENDING WILL BE IMPACTED BY THE THREAT OF COVID-19?

Category	No change	Significant decrease over 2019	Significant increase over 2019	Slight increase over 2019	Slight decrease over 2019
Bonuses	50%	12%		10%	28%
Business development	45%	4%	6%	18%	27%
Computers & equipment	53%	2%	8%	31%	6%
Discretionary spending	35%	15%		10%	40%
Health care	67%	1%	5%	26%	1%
Marketing / Promotion	55%	5%	7%	17%	17%
Recruitment / Hiring	56%	5%		19%	21%
Software / IT Systems / Online Storage	48%	3%	7%	39%	3%
Travel	19%	24%		6%	52%