

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.

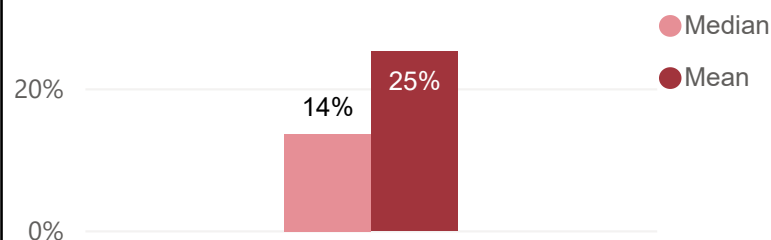
IMPACT ON TRAVEL POLICIES

	%
Business travel is to be conducted on a case-by-case basis	44%
All business travel has been suspended	23%
No impact	17%
Voluntary business travel has been suspended	6%
Other	5%
Business travel is limited to or prohibited from certain locations	5%

IMPACT ON BUDGET

	%
My firm is considering changes to the 2020 budget	57%
No changes have been made to my firm's 2020 budget and none are currently planned	39%
My firm has altered the 2020 budget due to COVID-19	5%

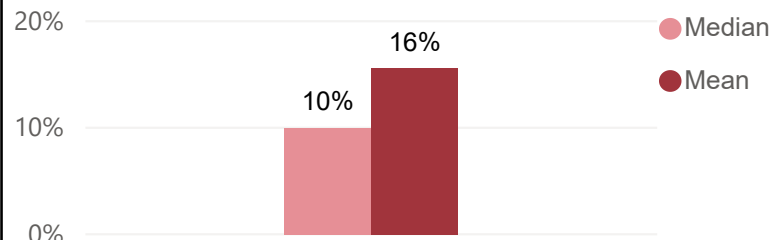
BUDGET DECREASE PERCENTAGE



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	67%
COVID-19 will not likely impact my firm's revenue in any way	33%
COVID-19 will likely cause my firm's revenue to increase	1%

REVENUE DECREASE PERCENTAGE



IMPACT ON EDUCATIONAL EVENTS & TRAINING

	%
Employees at my firm are not allowed to attend business conferences and trainings	30%
My firm supports employees individual decisions to not attend events or trainings but has not issued a change to formal policy	30%
Business conferences and trainings are approved on a case-by-case basis	18%
No changes have occurred to my firm's policy on educational events and trainings	15%
Other	6%

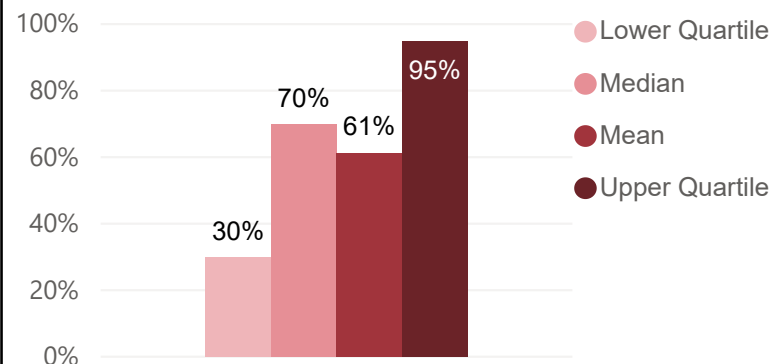
IMPACT ON CLIENT ENTERTAINMENT & NETWORKING

	%
My firm supports the decision of employees to refrain from public networking but has not issued a formal policy	48%
My firm has mandated that employees refrain from entertaining clients in social public settings (restaurants/bars/events)	27%
No change	18%
Other	4%
My firm is considering asking employees to refrain from entertaining clients in social public settings (restaurants/bars/events)	3%

IMPACT ON TELECOMMUTING & WORKING REMOTELY

	%
COVID-19 has changed my firm's policy on telecommuting to allow any employee to telecommute at any time.	36%
COVID-19 has changed my firm's policy on telecommuting to allow only certain employees to telecommute currently.	20%
My firm allows for telecommuting for certain employees and has not changed its policies in response to COVID-19.	18%
My firm allows for any employees to telecommute at any time and has not changed its policies in response to COVID-19.	15%
My firm does not allow for telecommuting and has not changed its policies in response to COVID-19.	11%

WHAT PERCENTAGE OF YOUR FIRM'S WORKFORCE CAN EFFECTIVELY WORK FROM HOME?



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	7%
Other	2%

CANCELLED OR DELAYED PROJECTS

	%
No projects have been cancelled and we do not anticipate cancellations or delays	41%
Clients have cancelled or delayed a project	30%
We have not yet cancelled or delayed a project, but are considering it	23%
Yes, my firm has cancelled or delayed a project	10%

INVESTMENTS IN RESPONSE TO COVID-19

	%
We have not made any significant investments	65%
We have hired additional cleaning services	27%
Other	9%
We have hired outside contingency consultants	2%

IMPACT ON PERSONAL TRAVEL

	%
I've stopped all non-essential personal travel	47%
I'm avoiding travel to certain locations	17%
I'm not planning on traveling outside of the country	15%
No impact	15%
I'm not planning on traveling outside of my immediate town/city	14%
I'm not planning on traveling outside of my state	6%
Other	5%
I'm not planning on leaving my home	4%
My firm has asked me to refrain from personal travel	4%
I've stopped all personal travel but am traveling for business	2%

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

RATING

	RATING
Ability to obtain new work	2.4
Ability to collaborate with subcontractors / consultants on projects	2.3
Ability to train staff	2.1
Ability to collaborate internally on projects	2.1
Collection period / Accounts receivable	2.1
Ability to find qualified staff	2.0
Ability to finish current projects on time	2.0
Ability to finish current projects within budget	1.8
Ability to provide high quality service and response to clients	1.8

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	48%	13%		8%	31%
Business development	44%	4%	5%	17%	30%
Computers & equipment	50%	2%	7%	34%	6%
Discretionary spending	34%	18%		8%	40%
Health care	66%	1%	6%	25%	2%
Marketing / Promotion	55%	5%	6%	17%	17%
Recruitment / Hiring	55%	7%	1%	17%	21%
Software / IT Systems / Online Storage	45%	3%	8%	41%	3%
Travel	19%	27%		5%	50%