



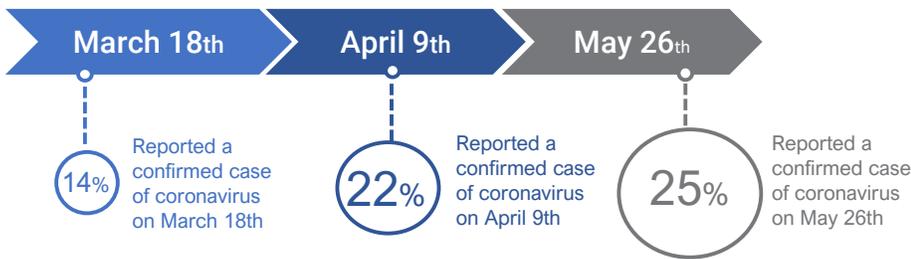
COVID-19

IMPACT AND IMPLEMENTATION SURVEY

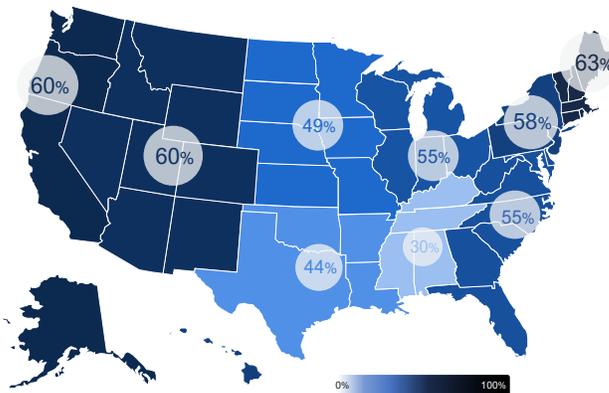
EXECUTIVE SUMMARY

IMPACT

Organizations Having an Employee with a Confirmed Case of Coronavirus

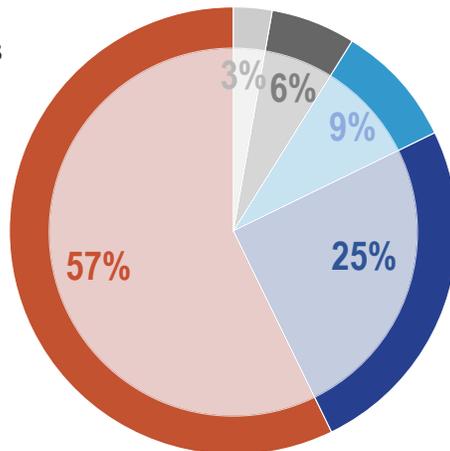


Percent of Organizations that Perceive Stay at Home and Social Distancing Measures are "Very Necessary"



What is your organization's current operations status?

- 90% to 100%
- 75% to 89%
- 50% to 74%
- 1% to 49%
- 0%/Temporarily Closed



About the COVID-19 Impact & Implementation Survey:

Results for the 3rd survey in the series are based on surveys collected between Tuesday, May 26th, and Thursday, May 28th. More than 830 ASCE members participated in the survey. Industry Insights is fielding these surveys to help its clients assess and track their members' perceptions, impact, and action plans related to COVID-19. Links to an online questionnaire were distributed to members. A total of 836 respondents participated in the survey. Confidence intervals can change, depending on the aggregate's sample size and the response variance, though the overall survey portion of this research has a standard error of +/- 3.0% at a 95% level of confidence.

The survey sample includes manufacturers, and professional services organizations and university and academic institutions representing a diverse set of industries.

The *COVID-19 Impact & Implementation Survey* was compiled, tabulated and analyzed by Industry Insights, Inc. (www.industryinsights.com), an independent research firm based in Columbus, OH.

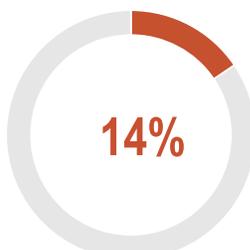
Survey Contact: Shawn Six, ssix@industryinsights.com

IMPACT

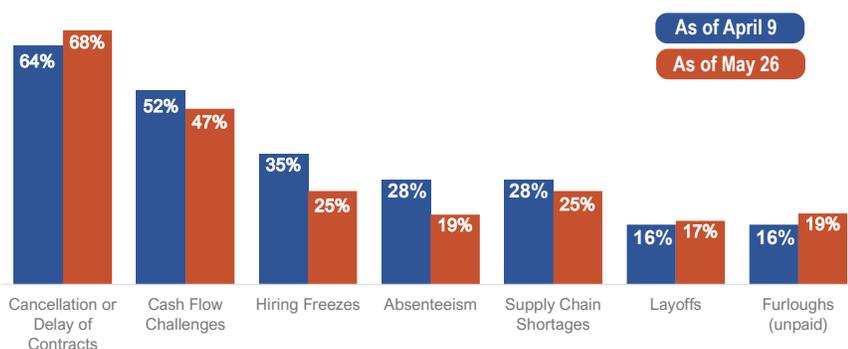
Organizations that have Recinded Offers to Entry Level Employees or Interns



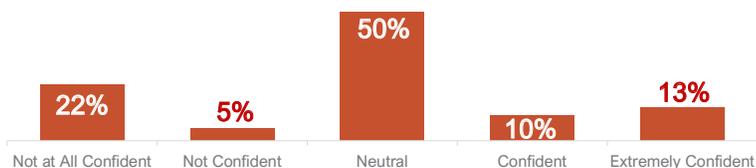
Companies Facing Potential Contract Penalties Due to Project Delays



Percentage of Organizations Experiencing the Following Negative Impacts



Level of Confidence Your Organization will Receive Benefits from the Federal Government Relief Packages Related to COVID-19



Most Important Goal for Infrastructure Funding Included in a Stimulus Package

Put largest number of people back to work	32%
Invest in modernized infrastructure	21%
Address the backlog of projects	14%
Release more opportunities for small business engineering firms	12%
Replace lost revenue	9%
Improve resilience	9%

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IMPACT AND IMPLEMENTATION SURVEY EXECUTIVE SUMMARY

Impact:

The coronavirus is continuing to reach employees. Whereas 14% of organizations had an employee with COVID-19 as of March 18, the rate climbed to 22% as of April 9 and then ticked up slightly to 25% as of May 26. While nearly half of organizations' leaders agree that the "stay at home" and social distancing mandates are necessary actions, this percentage has declined significantly since April 9 when 75% agreed with these actions. Not surprisingly due to the level of Covid-19 cases and deaths, respondents in the Northeast expressed the most concern.

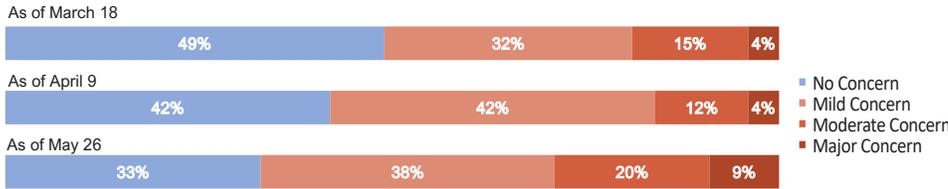
The vast majority (82%) of organizations engaged in civil engineering are currently operating at a 75% or higher capacity. Only 6% of the organizations are operating at a capacity of less than 50%. Twenty percent have rescinded offers to entry level employees or interns (up from 15% on April 9). Two-thirds of the responding organizations have experienced cancellation or delay of contracts. One out of seven organizations are facing potential contract penalties due to project delays. Nearly half are reporting cash flow challenges. About 25% of the respondents expressed confidence their organization will receive benefits from federal government relief packages related to Covid-19.

IMPACT

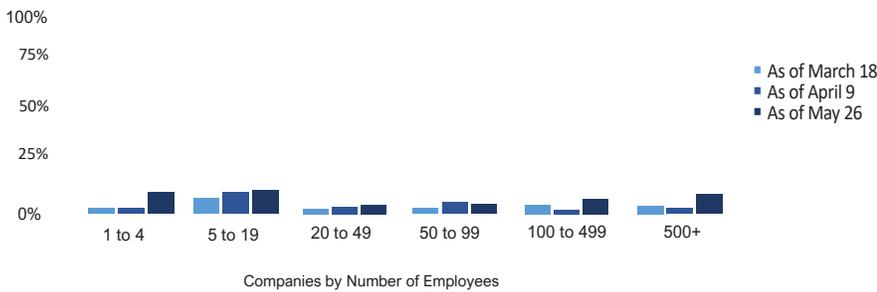
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IMPACT AND IMPLEMENTATION SURVEY EXECUTIVE SUMMARY

Extent of Long-Term Viability Concerns Due to the Coronavirus (Average)



Percentage Reporting Major Concerns on Long-Term



Organizations that Experienced Coronavirus Related Delays in Receiving Materials/Products from Suppliers



50% of organizations experienced coronavirus related supply chain delays as of May 26.

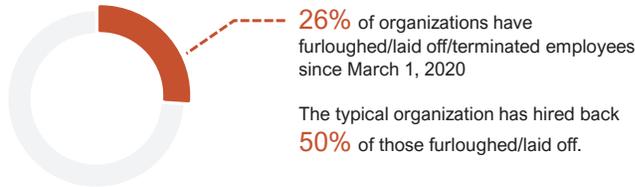
Impact:

Despite the gradual reopening of the national economy since April 9, organizations expressing moderate to major concerns over their long-term viability has jumped from 16% to 29%. The smallest (less than 20 employees) and the largest (500+ employees) expressed the most concern over their long term viability.

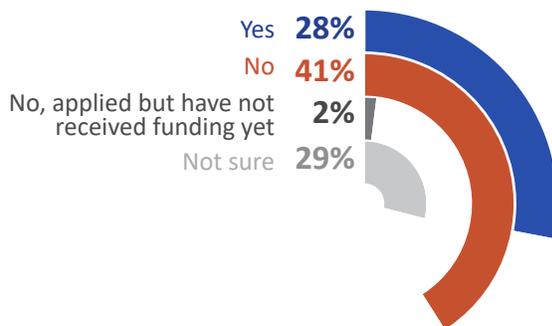
As of May 26, half of the responding organizations have experienced coronavirus related delays in receiving materials/products from suppliers. The results from the April 9 survey showed a similar percentage. One-quarter of the organizations have furloughed/laid off/terminated employees since March 1, 2020. The typical organization has hired back 50% of those furloughed/laid off.

ACTION STEPS

Workforce Reductions



Did Your Organization Receive Funds Through the Paycheck Protection Program?



As "Stay-at-home" Orders Have Started to Lift for Much of the Nation, What Are Your Top Challenges Due to the Covid-19 Pandemic?

Top 10 Overall

- 1 Economic uncertainty
- 2 Employee safety
- 3 Managing overall safety requirements/regulations
- 4 Work from home challenges
- 5 Managing remote workforce
- 6 Work/life balance
- 7 Employee morale
- 8 Communications—external (customers/suppliers, etc.)
- 9 Customers going out of business
- 10 Communications—internal (employees/staff)

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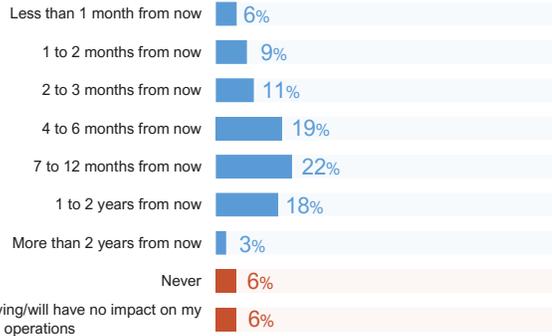
Action Steps:

Nearly 1/3 of organizations have received funds through Paycheck Protection Program of the CARES Act. A large percentage (41%) of the organizations did not apply for funds through the Paycheck Protection Program. This large percentage is likely due to the size of the companies responding to the survey as 35% of them reported 500+ employees thus making them ineligible. Only 2% of the respondents reported applying to the program but not receiving funds.

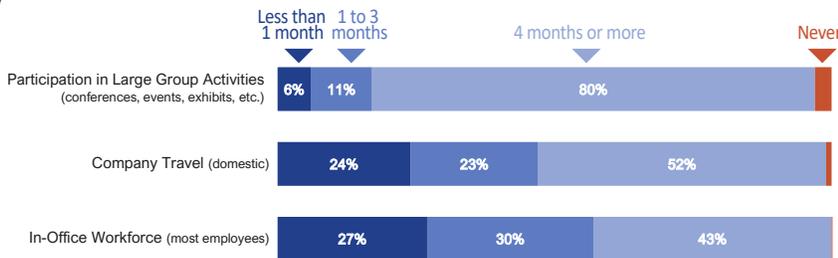
The top challenges faced by civil engineering firms now that stay-at-home orders are starting to lift around the country are economic uncertainty, employee safety and managing overall safety requirements/regulations. Many organizations also expressed having challenges with working from home and managing a remote workforce.

THE FUTURE

Expectations for a Return to Pre-COVID-19 Day-to-Day Operations Status



Expectations of When Organizations will Return to Pre-COVID-19 Operations Status Now That "Stay-at-Home" Orders/Directives are Largely Lifted



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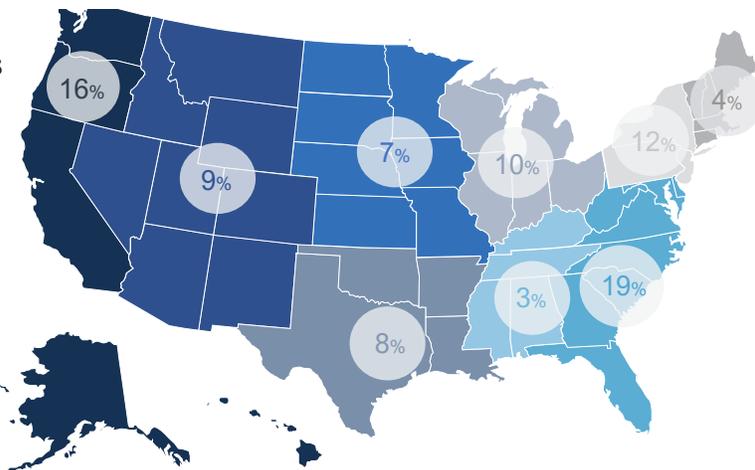
The Future:

The timeline has been pushed for when organizations expect their daily operations will return to a pre-COVID-19 status. For the March 18 survey, respondents noted a general plan that things should return to normal by May 15. On April 9, survey respondents predicted operations to return to normal by July 10. In the most recent survey, organizations are realizing their operations will likely not return to normal until December.

Expectations for participation in large group activities, organizational travel and a return to in-office work has also been pushed back significantly. In the April 9 survey, 75% felt they would return to in-office work once stay-at-home orders were lifted. In this most current survey, only 27% indicated they would be returning within one month and only about 57% felt they would be back in the office within 3 months. While over 80% expected a return to organizational travel within 3 months once stay-at-home orders were lifted on April 9, this figure dropped to 47% as of May 26.

PROFILE

Respondents by Region

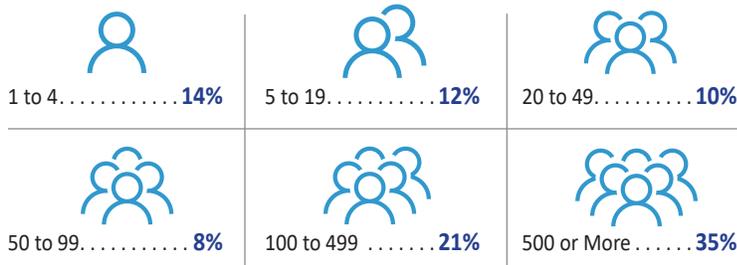


PROFILE

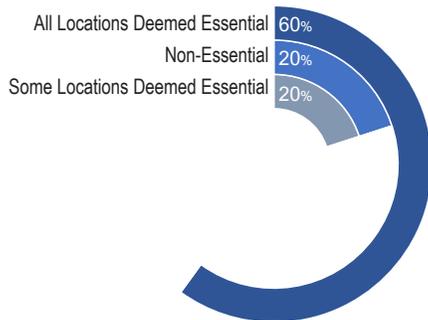
Respondents by Organization Type

	Manufacturer	3%
	Construction Contractor	10%
	Service Provider to Organizations	45%
	Service Provider to Individuals	15%
	University/Academic	8%
	Other	39%

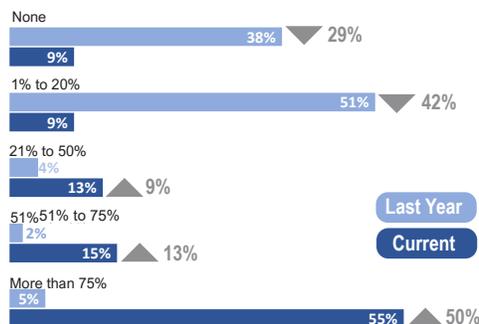
Number of Employees



Respondents by Jurisdiction Classification



Portion of Employees Working Remotely



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About Industry Insights, Inc:

Industry Insights is a research and data analytics firm that has been serving the research needs of trade and professional associations, dealer organizations and other affiliated groups since 1980. The firm specializes in providing high-quality research services that assist such organizations in better fulfilling the informational and educational needs of their members.

As a group of CPAs, Statisticians, and IT professionals with decades of experience in providing survey research solutions for trade and professional associations, Industry Insights excels in defining methods and tools that provide relevant and user-friendly information for each client. Industry Insights serves as an objective third party and ensures the confidentiality of respondents' data. Industry Insights welcomes questions about this survey. We may also be able to put you in touch with client contacts who could more specifically provide details and context regarding their members' strategies.

Survey Contact:

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