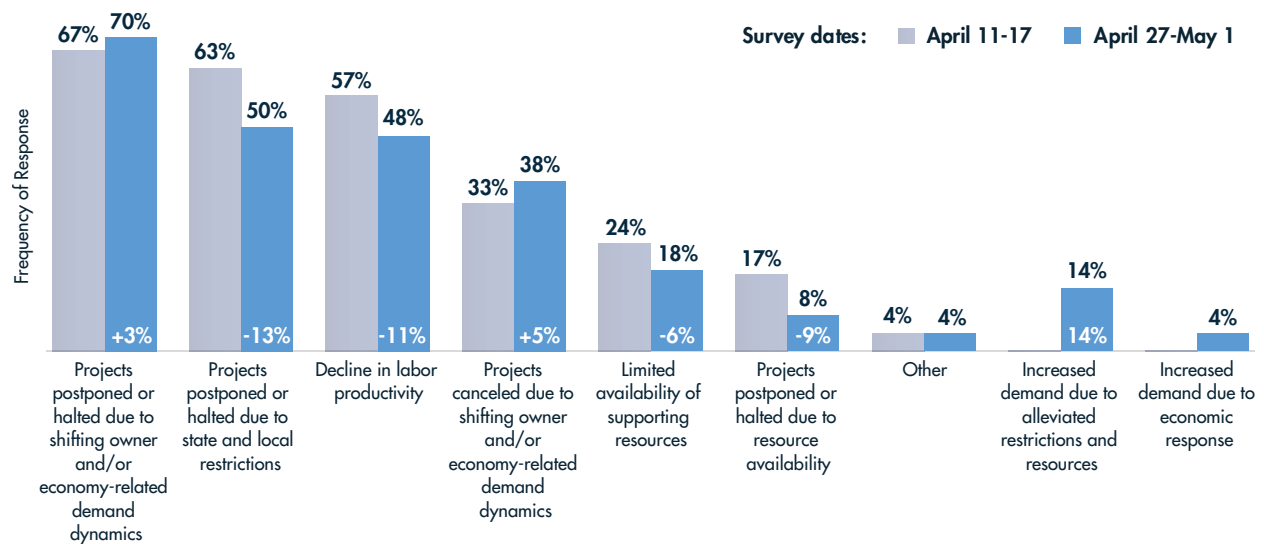


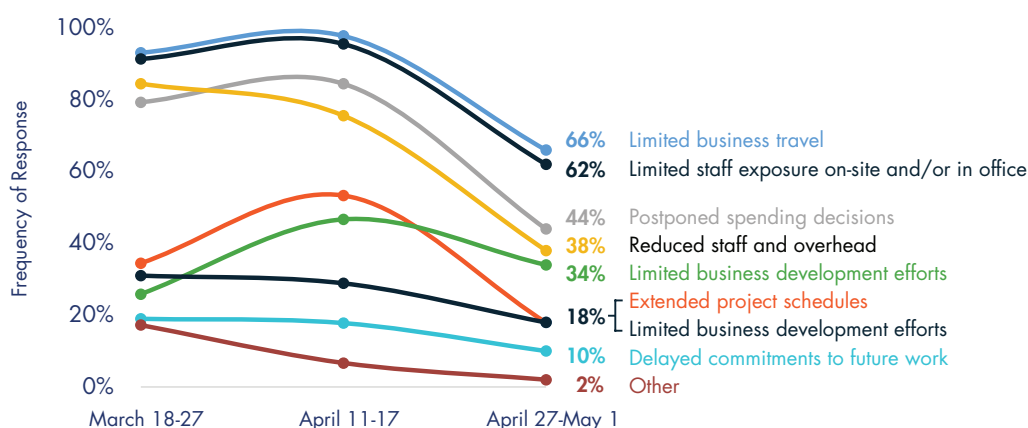
CIRT members were asked, originally in mid-April and again between April 27 and May 1, where they had seen changing demand for design and construction services. The difference in the responses shows that over the past two weeks, economic influence has had a broader impact on postponed or canceled projects. Also, other listed limiting factors (e.g., state/local regulation, productivity, resources availability) have become less influential in changing demand. Several respondents have seen some increase in demand due to alleviated restrictions/resources (14%) and economic response (4%).

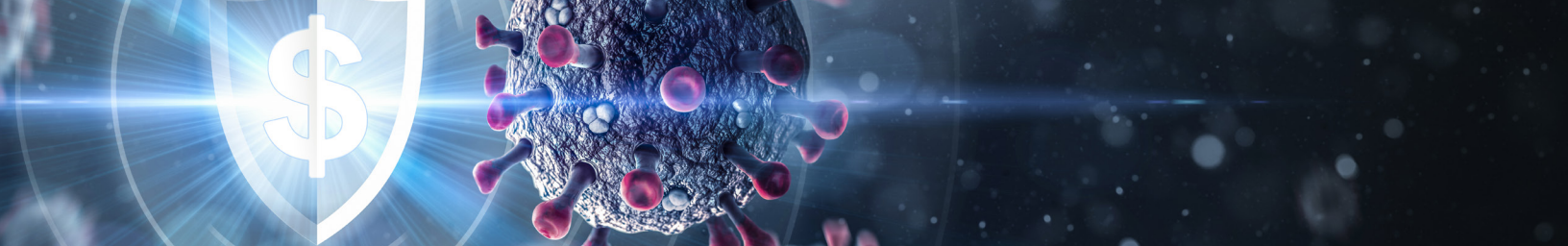
Identify where you have seen **changing demand** for design and construction services. (Select all that apply)



Over the past two weeks, organizational response has moderated, falling between 40% and 70% across most factors. Of those listed, **reduced staff and overhead** is the least changed heading into May, followed by limited business travel and staff exposure on-site and/or in office.

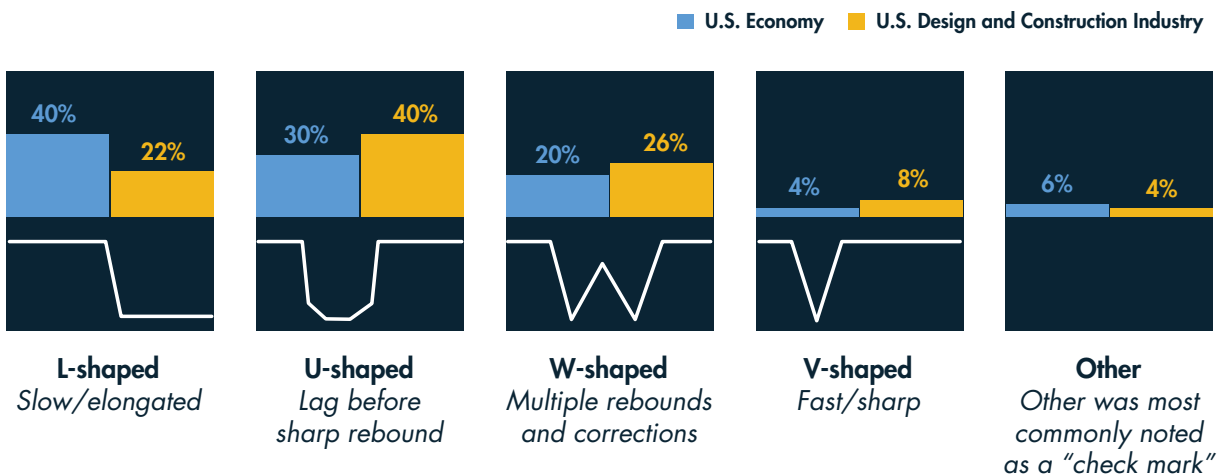
How has your organization responded to the convergence of those economic disruptions (e.g., COVID-19, depressed oil prices and market volatility)? (Select all that apply)





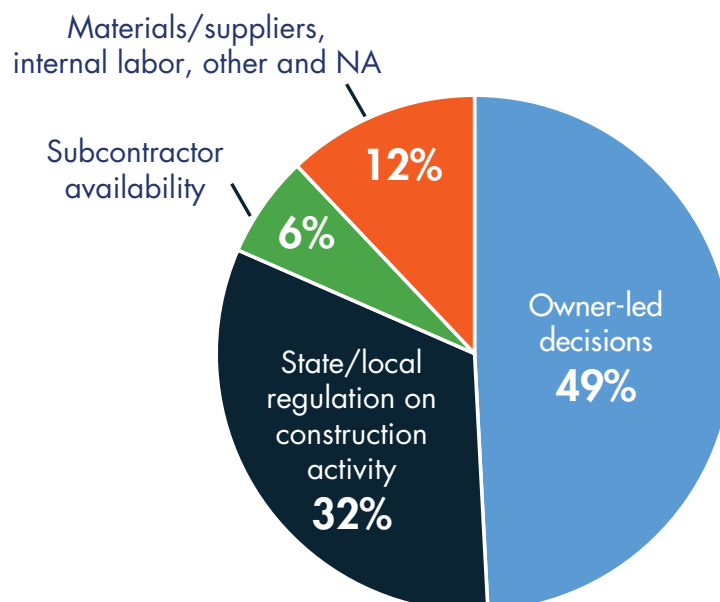
Survey responses suggest that a recovery will look different comparing the U.S. economy and the design and construction industry. Most members expect that a national economic recovery will follow an L-shaped pattern (40%), whereas the design and construction industry will follow a U-shaped pattern (40%). Respondents generally agreed that a V-shaped recovery was the least likely of the options provided.

What do you anticipate a recovery will look like for the ... ?



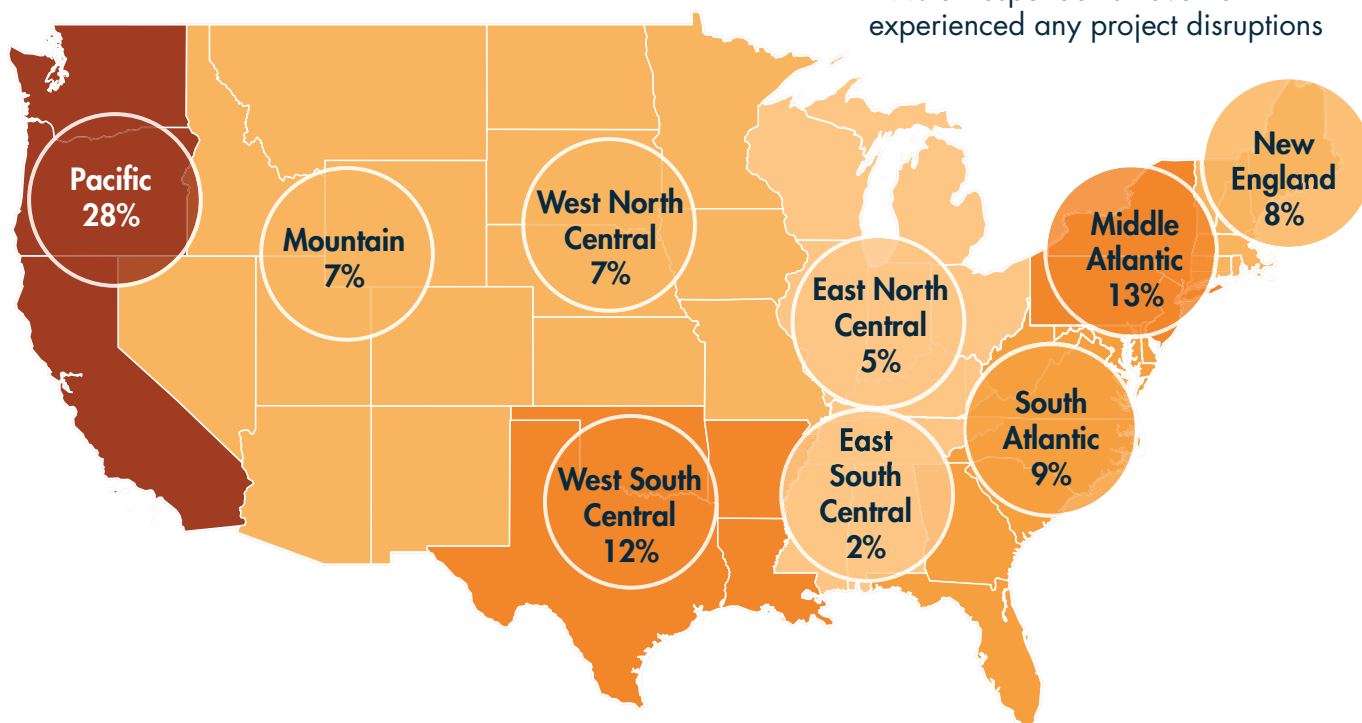
Since March 1, 2020

Considering all of your organization's project disruptions, please allocate share estimates associated with the below:



Again, considering all of your organization's project disruptions, please provide share estimates for project disruptions that your organization has experienced across the different census divisions.

~9% of respondents have not experienced any project disruptions



Most reported U.S. project disruptions have occurred across the PACIFIC census division (28%). High concentrations of disruptions have also occurred in the MIDDLE ATLANTIC (13%) and WEST SOUTH CENTRAL (12%).

Given the growing number of furloughed employees among CIRT companies, how are you handling the following items:

| | YES | NO | Not Decided |
|---|-----|-----|-------------|
| Are you keeping them on company email/email accounts? | 68% | 6% | 26% |
| Do they still have full access to company electronics/IT, etc.? | 59% | 23% | 18% |
| Do you still pay for health care/full cost? | 70% | 14% | 16% |
| What about only the company covered portion of the costs? | 74% | 7% | 19% |
| Are you treating furloughed employees in all respects as a fully employed person? | 55% | 27% | 18% |
| Will that change if the business slowdown goes beyond July 1, 2020? | 46% | 25% | 29% |



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