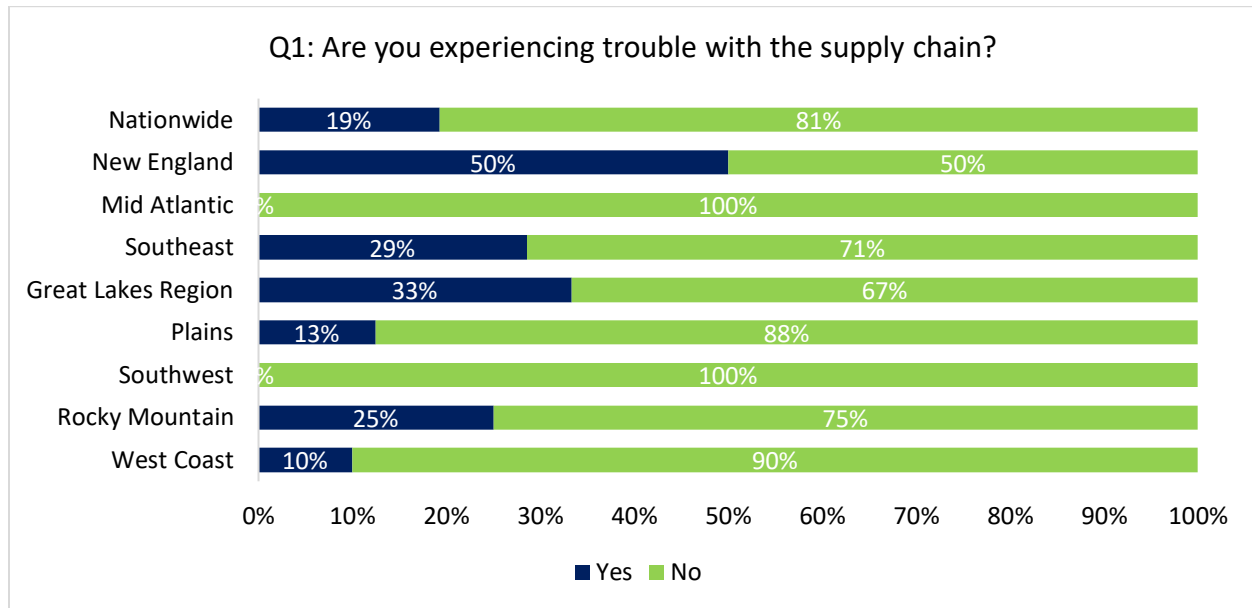


Commercial and Industrial Insulation Contractor Survey 5.22.20
57 Respondents



Selected: Comments:

“Although demand is still low since restrictions are still in place in several surrounding counties.”

“Freight lines are affecting availability of product.”

“Insulation materials seem to be readily available, it is the PPE's that are hard to acquire.”

“some delays from insulation materials manufacturers”

Number of Respondents

West Coast: 10, Yes: 1, No: 9

Rocky Mountain: 4, Yes: 1, No: 3

Southwest: 2, Yes: 0, No: 2

Plains: 8, Yes: 1, No: 7

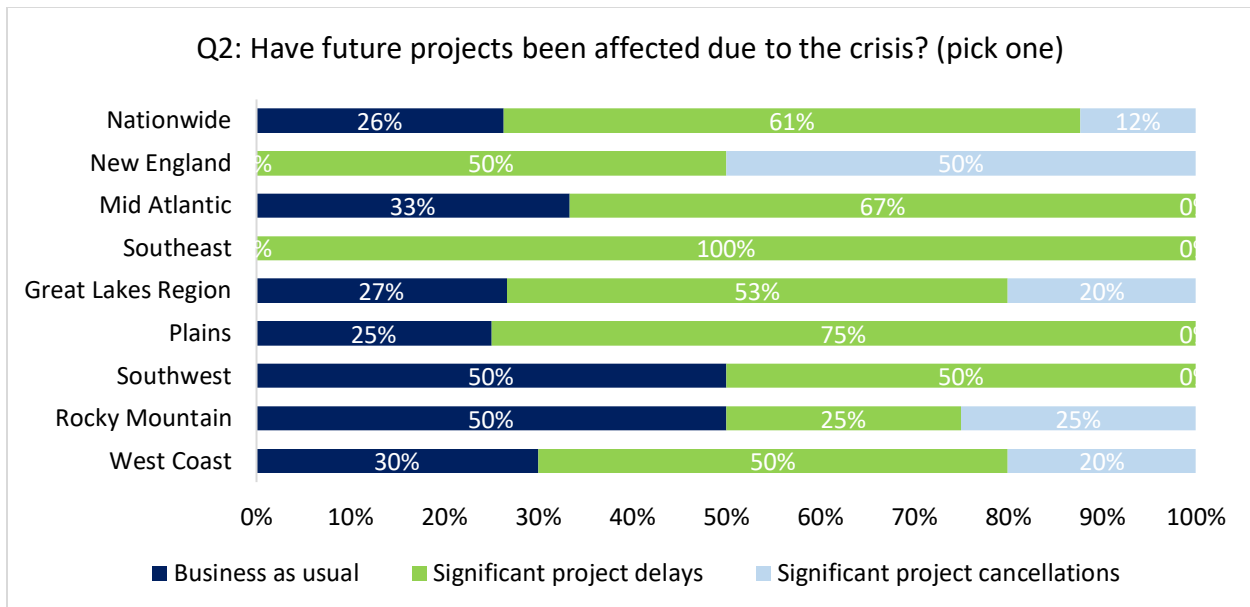
Great Lakes Region: 15, Yes: 5, No: 10

Southeast: 7, Yes: 2, No: 5

Mid Atlantic: 9, Yes: 0, No: 9

New England: 2, Yes: 1, No: 1

Nationwide: 57, Yes: 11, No: 46



Selected Comments:

“So far only a few limited project cancellations. However we see that trend increasing. Remains to be seen.”

“Delays but builders say the projects will go”

“We are hearing of delays to projects but with things just getting started back up it is too early to determine the outcome.”

“2 large jobs have been postponed to next year”

“If someone tests positive for covid, there is a 3-7 day site shutdown to allow for cleaning.”

“We have had large shut downs canceled due to concerns of COVID spread inside of the power plants we are working at. We have had facilities stop all inside work and only allows to get on exterior work, which is limited.”

Number of Respondents

West Coast: 10, Yes - 1 No - 9

Rocky Mountain: 4, Yes - 1 No - 3

Southwest: 2, Yes - 0 No - 2

Plains: 8, Yes - 1 No - 7

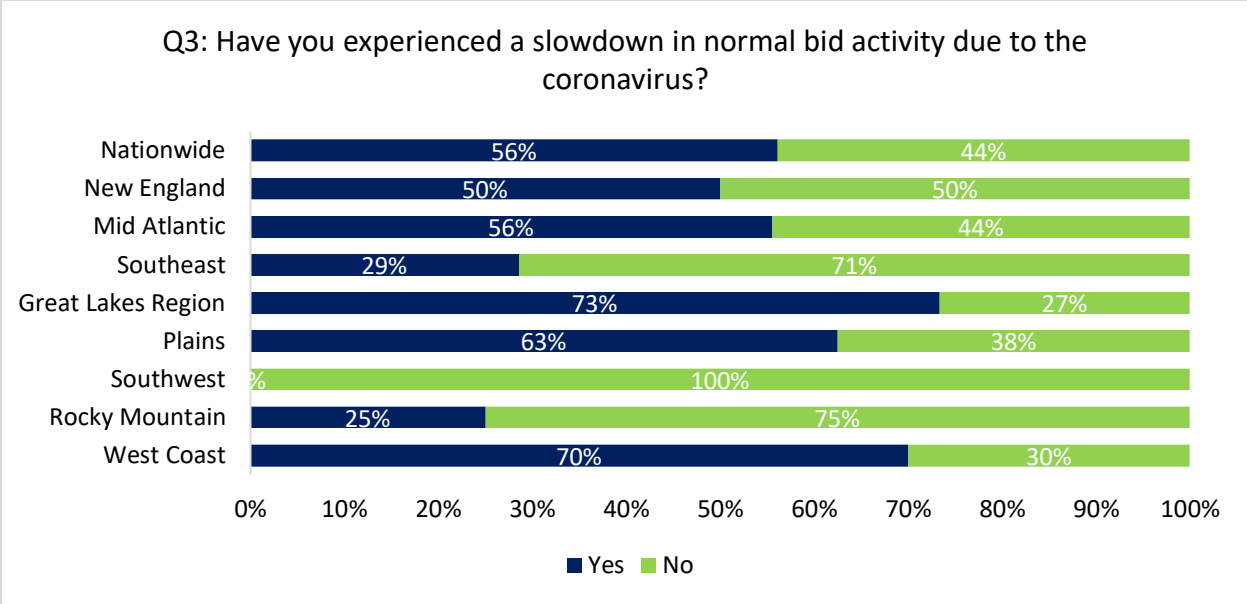
Great Lakes Region: 15, Yes - 5 No - 10

Southeast: 7, Yes - 2 No - 5

Mid Atlantic: 9, Yes - 0 No - 9

New England: 2, Yes - 1 No - 1

Nationwide: 57, Yes - 11 No - 46



Selected Comments:

“Bidding of many projects still on hold.”

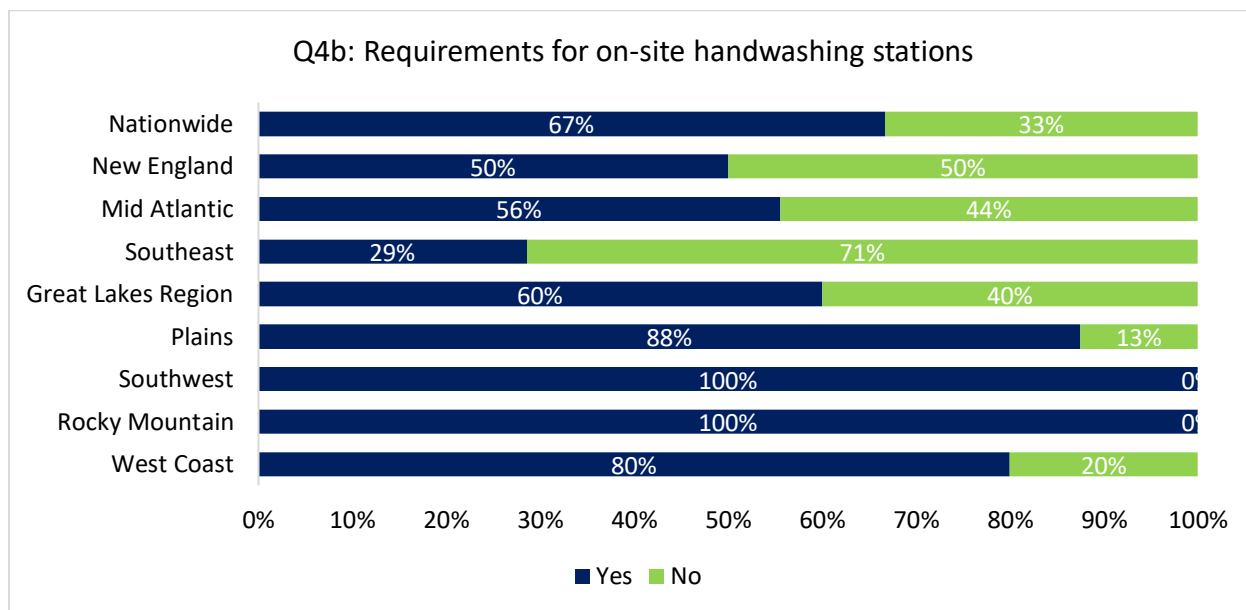
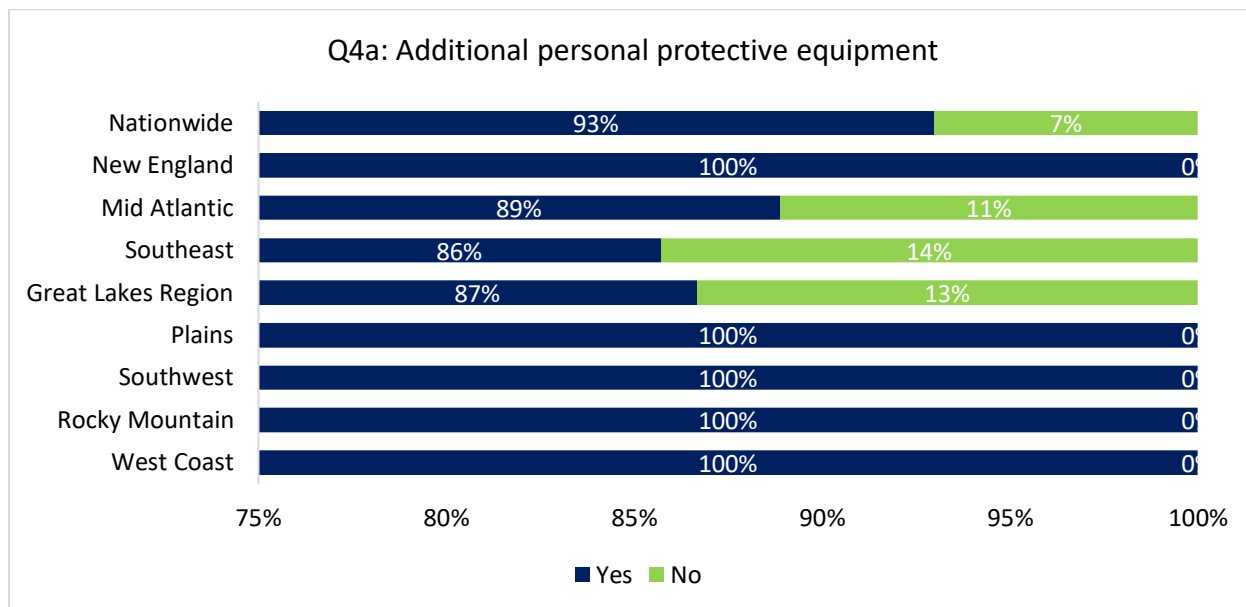
“A significant number of bids have cancelled. Many projects postponed until at least 2021. Also reduction in overall bids, particularly those coming from Colleges and Universities.”

“There are not as many requests coming in”

Number of Respondents

West Coast: 10, Business as usual: 3, Significant project delays: 5, Significant project cancellations: 2
 Rocky Mountain: 4, Business as usual: 2, Significant project delays: 1, Significant project cancellations: 1
 Southwest: 2, Business as usual: 1, Significant project delays: 1, Significant project cancellations: 0
 Plains: 8, Business as usual: 2, Significant project delays: 6, Significant project cancellations: 0
 Great Lakes Region: 15, Business as usual: 4, Significant project delays: 8, Significant project cancellations: 3
 Southeast: 7, Business as usual: 0, Significant project delays: 7, Significant project cancellations: 0
 Mid Atlantic: 9, Business as usual: 3, Significant project delays: 6, Significant project cancellations: 0
 New England: 2, Business as usual: 0, Significant project delays: 1, Significant project cancellations: 1
 Nationwide: 57, Business as usual: 15, Significant project delays: 35, Significant project cancellations: 7

Q4: Has your state or local jurisdiction imposed new workplace safety measures that impact you? (Select all that apply)



Q4a

Number of Respondents

West Coast: 10,
Yes: 10,
No: 0

Rocky Mountain: 4,
Yes: 4,
No: 0

Southwest: 2,
Yes: 2,
No: 0

Plains: 8,
Yes: 8,
No: 0

Great Lakes Region: 15,
Yes: 13,
No: 2

Southeast: 7,
Yes: 6,
No: 1

Mid Atlantic: 9,
Yes: 8,
No: 1

New England: 2,
Yes: 2,
No: 0

Nationwide: 57,
Yes: 53,
No: 4

Q4b

Number of Respondents

West Coast: 10,
Yes: 8,
No: 2

Rocky Mountain: 4,
Yes: 4,
No: 0

Southwest: 2,
Yes: 2,
No: 0

Plains: 8,
Yes: 7,
No: 1

Great Lakes Region: 15,
Yes: 9,
No: 6

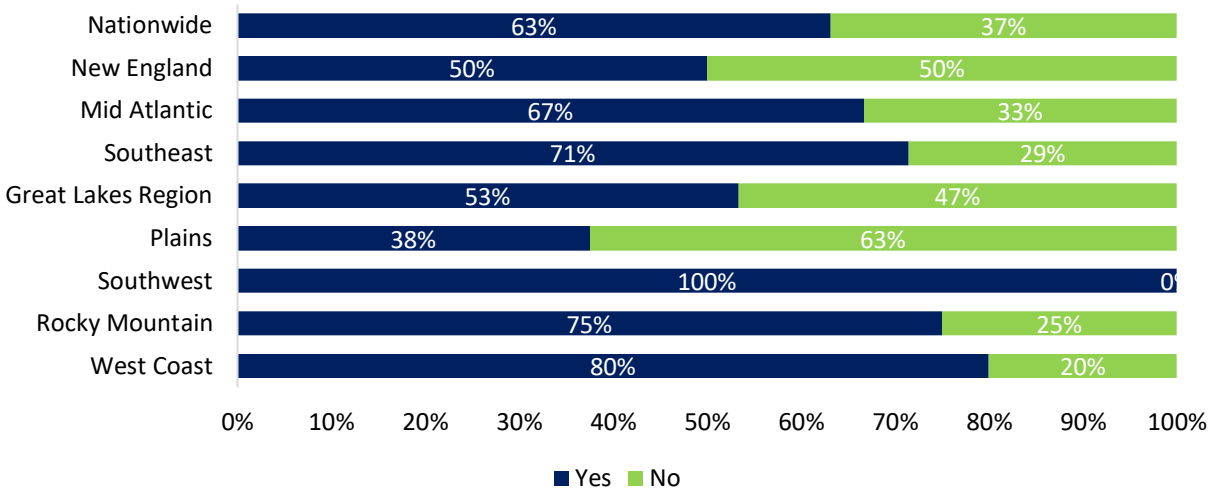
Southeast: 7,
Yes: 2,
No: 5

Mid Atlantic: 9,
Yes: 5,
No: 4

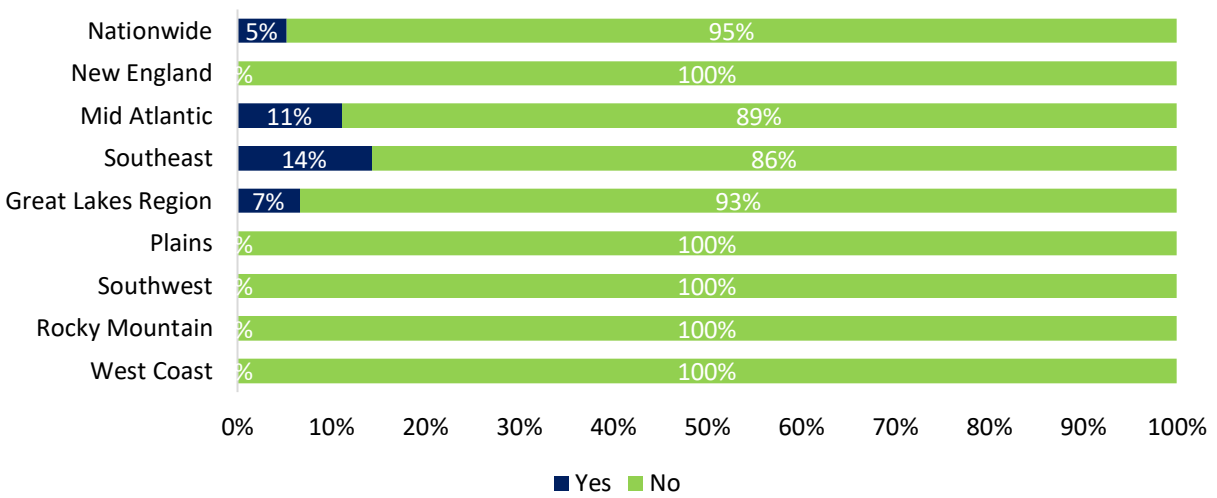
New England: 2,
Yes: 1,
No: 1

Nationwide: 57,
Yes: 38,
No: 19

Q4c: Limitations on numbers of workers at a job site



Q4d: Only allowing one trade at a time on job sites



Q4c

Number of Respondents

West Coast: 10,
Yes: 8,
No: 2

Rocky Mountain: 4,
Yes: 3,
No: 1

Southwest: 2,
Yes: 2,
No: 0

Plains: 8,
Yes: 3,
No: 5

Great Lakes Region: 15,
Yes: 8,
No: 7

Southeast: 7,
Yes: 5,
No: 2

Mid Atlantic: 9,
Yes: 6,
No: 3

New England: 2,
Yes: 1,
No: 1

Nationwide: 57,
Yes: 36,
No: 21

Q4d

Number of Respondents

West Coast: 10,
Yes: 0,
No: 10

Rocky Mountain: 4,
Yes: 0,
No: 4

Southwest: 2,
Yes: 0,
No: 2

Plains: 8,
Yes: 0,
No: 8

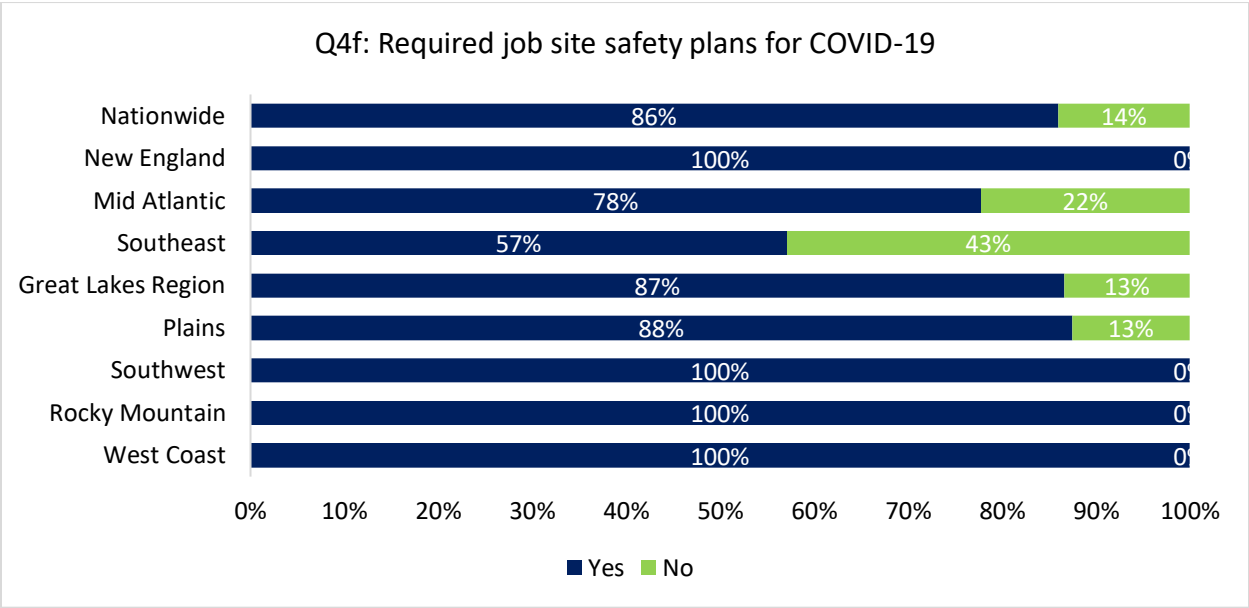
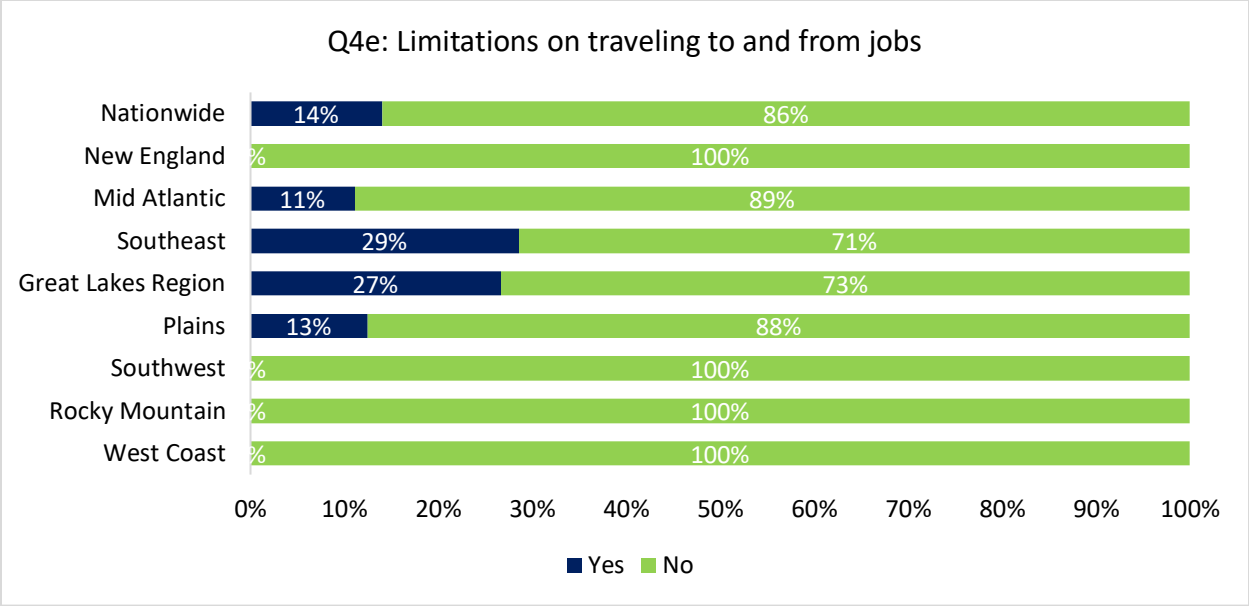
Great Lakes Region: 15,
Yes: 1,
No: 14

Southeast: 7,
Yes: 1,
No: 6

Mid Atlantic: 9,
Yes: 1,
No: 8

New England: 2,
Yes: 0,
No: 2

Nationwide: 57,
Yes: 3,
No: 54



Selected Comments:

“Virtually all large commercial projects in this region require every contractor to establish their own COVID-19 protocol and to conduct safety training for all employees prior to entering a job site.”

“Temperature checks on some jobs”

“Require helping with contact tracing in the event of a positive test. Required to screen every employee every day and document it. Have to provide masks for employees and replace them as often as they become soiled or in need of replacement.”

Q4e

Number of Respondents

West Coast: 10,
Yes: 0,
No: 10

Rocky Mountain: 4,
Yes: 0,
No: 4

Southwest: 2,
Yes: 0,
No: 2

Plains: 8,
Yes: 1,
No: 7

Great Lakes Region: 15,
Yes: 4,
No: 11

Southeast: 7,
Yes: 2,
No: 5

Mid Atlantic: 9,
Yes: 1,
No: 8

New England: 2,
Yes: 0,
No: 2

Nationwide: 57,
Yes: 8,
No: 49

Q4f

Number of Respondents

West Coast: 10,
Yes: 10,
No: 0

Rocky Mountain: 4,
Yes: 4,
No: 0

Southwest: 2,
Yes: 2,
No: 0

Plains: 8,
Yes: 7,
No: 1

Great Lakes Region: 15,
Yes: 13,
No: 2

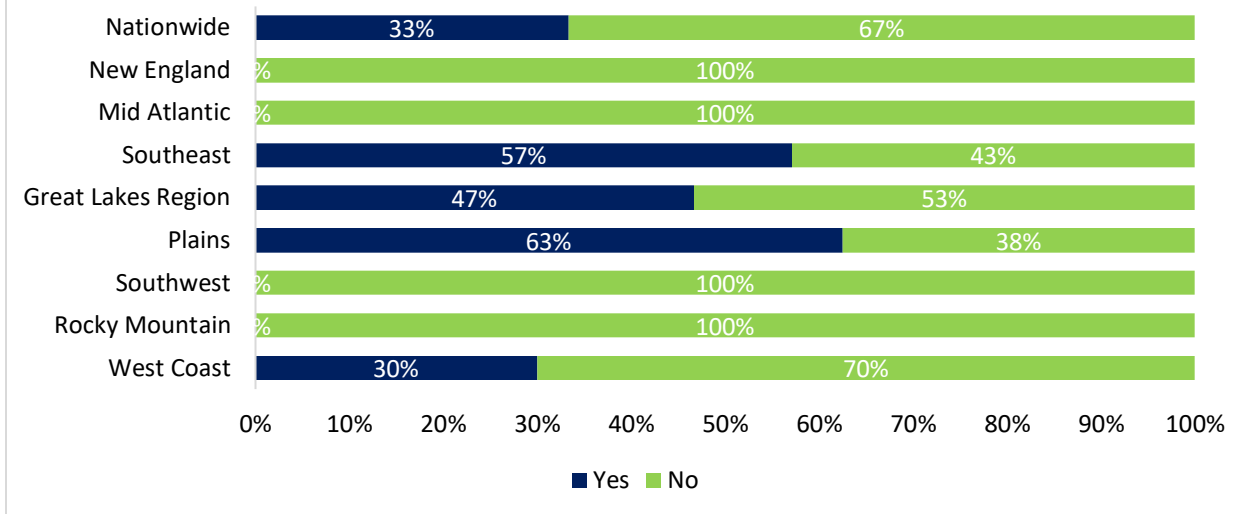
Southeast: 7,
Yes: 4,
No: 3

Mid Atlantic: 9,
Yes: 7,
No: 2

New England: 2,
Yes: 2,
No: 0

Nationwide: 57,
Yes: 49,
No: 8

Q5: Are new worker safety requirements difficult to comply with?



Selected Comments:

“Varies. In some cases requirements are very strict. For example, aside from simple hand washing, daily sign in, and temperature taking, which is very common, there are restrictions of only one person on an elevator at a time and things like separate portable restrooms for each subcontractor. Each restroom must be secured by a padlock so that no other company can have access to a restroom other than their own assigned unit.”

“Timing and coordination issues can be challenging.”

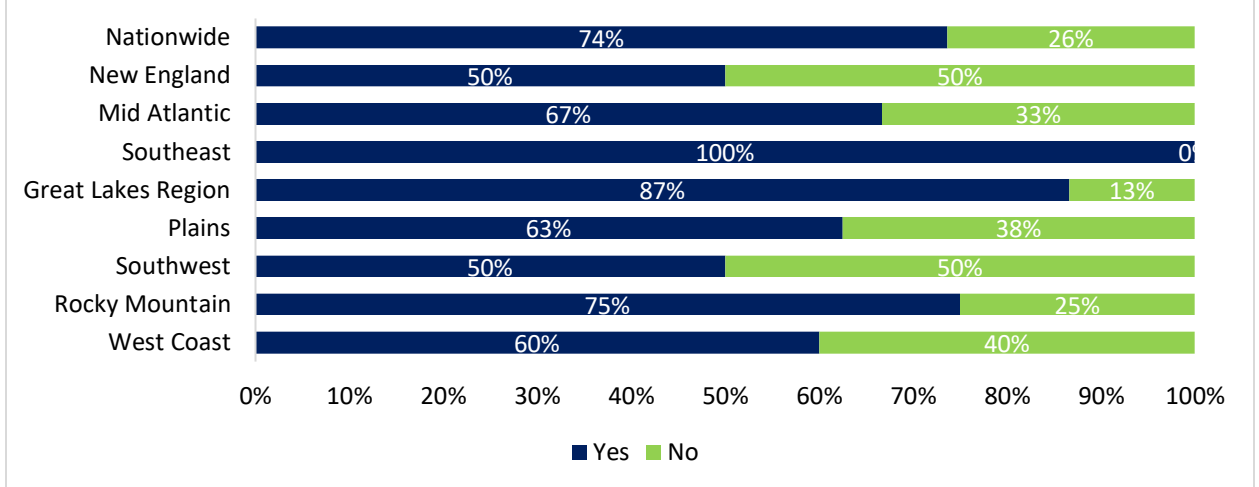
“Availability of required PPE (hand sanitizers, wipes, masks, etc) are hard to get”

“The new rules are not hard to comply with, they do add extra costs in labor and out of town expenses.”

“Mainly because PPE is so hard to get and so expensive to buy right now.”

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Q6: Is your company having difficulty obtaining personal protective equipment (PPE)?



Selected Comments:

“N95 masks and fresh air filters”

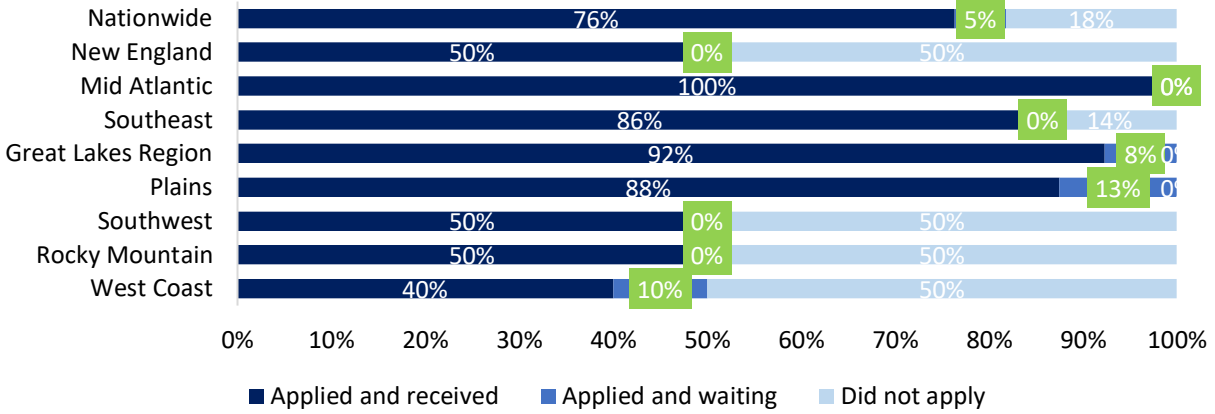
“Masks and fresh air cartridges only”

“We are sitting on approximately 2 months of PPE with no guarantee any more will be available any time soon.”

“We are maintaining our supplies, but are having to spend significant amounts of time ensuring we are receiving the required PPE”

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Q7: Has your company sought financial support from the U.S. Small Business Administration's Paycheck Protection Program (PPP) or Economic Injury Disaster Loan (EIDL) program?

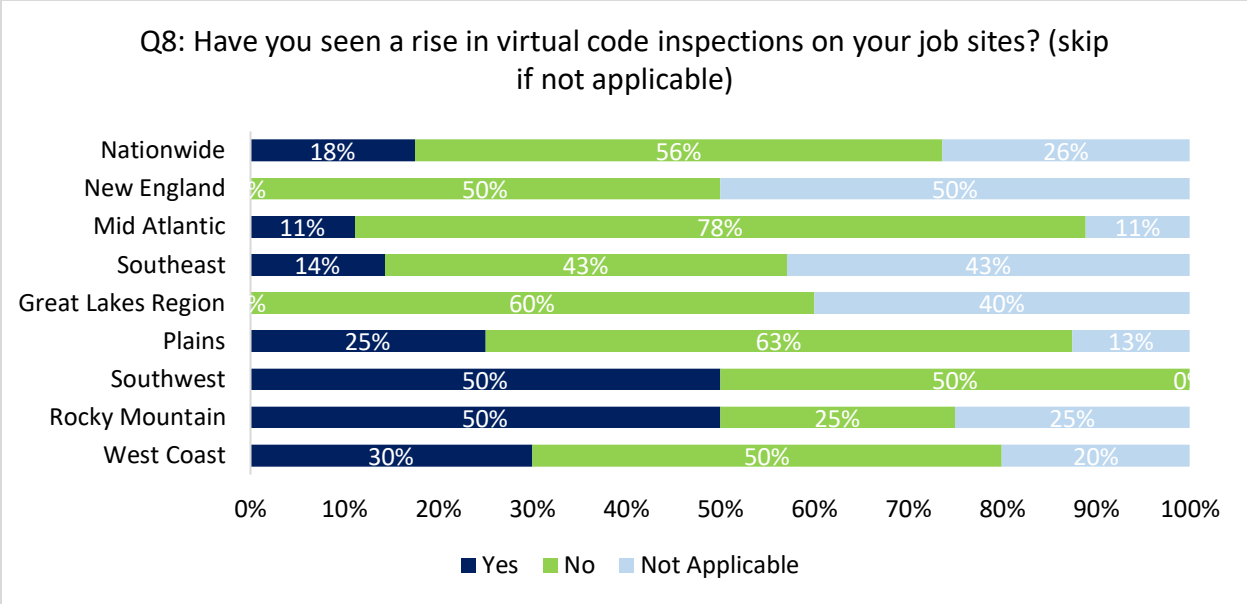


Selected Comments:

“Only PPP”

“Not quite sure if that is a good thing or not.”

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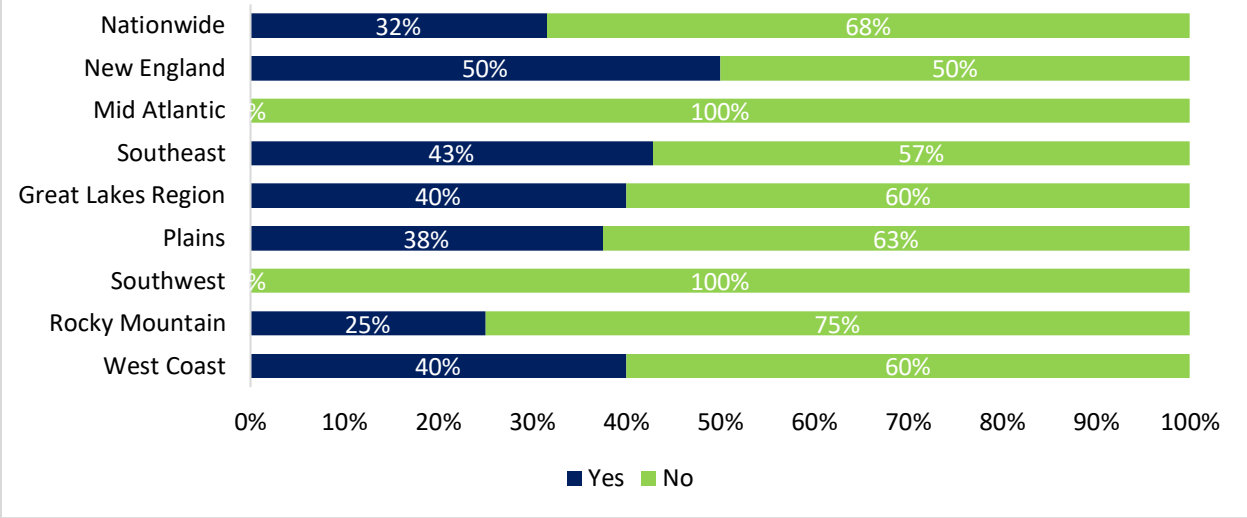
Selected Comments:

“Our county has went 100 percent virtual”

“We've had a hard time getting inspections in some localities.”

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Q9: Have you had to reduce worker headcount due to the crisis?



Selected Comments:

“Initially as job sites shut down but now back to normal levels”

“Large commercial are resuming at a slow pace.”

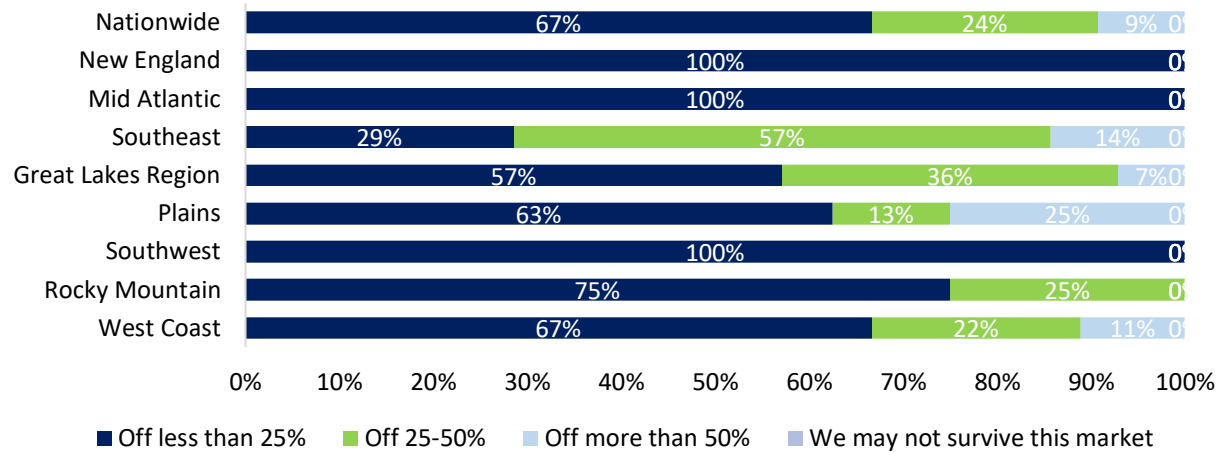
“We had to split the crew between shifts to provide some social distancing.”

“We are actually adding staff”

“We have been able to keep the workforce because our current work hasn't been significantly reduced yet. If things don't improve on the bid side, I'd expect us to have to reduce later this year once our backlog runs dry.”

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Q10: What is the expected financial impact of this crisis on your business in 2020?



Selected Comments:

“Uncertain. Need to wait to see after construction resumes to see if things will return to a normal pace or if the restart will ramp up slowly.”

“As of now, we are still on track to meet budgeted revenue.”

Q10

Number of Respondents

West Coast: 9,
Off less than 25%: 6,
Off 25-50%: 2,
Off more than 50%: 1,
We may not survive this market: 0

Rocky Mountain: 4,
Off less than 25%: 3,
Off 25-50%: 1,
Off more than 50%: 0,
We may not survive this market: 0

Southwest: 2,
Off less than 25%: 2,
Off 25-50%: 0,
Off more than 50%: 0,
We may not survive this market: 0

Plains: 8,
Off less than 25%: 5,
Off 25-50%: 1,
Off more than 50%: 2,
We may not survive this market: 0

Great Lakes Region: 14,
Off less than 25%: 8,
Off 25-50%: 5,
Off more than 50%: 1,
We may not survive this market: 0

Southeast: 7,
Off less than 25%: 2,
Off 25-50%: 4,
Off more than 50%: 1,
We may not survive this market: 0

Mid Atlantic: 9,
Off less than 25%: 9,
Off 25-50%: 0,
Off more than 50%: 0,
We may not survive this market: 0

New England: 1,
Off less than 25%: 1,
Off 25-50%: 0,
Off more than 50%: 0,
We may not survive this market: 0

Nationwide: 54,
Off less than 25%: 36,
Off 25-50%: 13,
Off more than 50%: 5,
We may not survive this market: 0