DEMOGRAPHICS
RESPONDENTS’ ORGANIZATIONS ARE HEADQUARTERED IN A VARIETY OF LOCATIONS AROUND THE UNITED STATES.

- Throughout this report meaningful, statistically significant differences by geographic region are noted.

### Census Region

- **New England**: 4%
- **Middle Atlantic**: 8%
- **East North Central**: 13%
- **West North Central**: 7%
- **South Atlantic**: 18%
- **East South Central**: 6%
- **West South Central**: 14%
- **Mountain**: 14%
- **West**: 15%

Q11. In which state is your organization headquartered?
MORE THAN HALF (53%) OF RESPONDENTS INDICATE THERE ARE 25 OR FEWER FULL-TIME EQUIVALENTS AT THEIR ORGANIZATION.

- The largest organization in this survey reported 11,000 FTEs.
- Although the average number of FTEs is 107, the median is 23, indicating that some very large firms are skewing the average size. Therefore, the median is a more helpful metric to use in this analysis.
- The median FTE by geographic region is:
  - New England = 27
  - Middle Atlantic = 50
  - East North Central = 38
  - West North Central = 44
  - South Atlantic = 24
  - East South Central = 12
  - West South Central = 15
  - Mountain = 19
  - West = 20

Q12. How many full-time equivalent employees (FTEs) do you have? If you are not sure, please provide your best estimate.
ALTHOUGH 60% OF ORGANIZATIONS INDICATED THEY DO NOT NORMALLY TRAVEL INTERNATIONALLY, AMONG THOSE THAT DO, NEARLY ALL HAVE RESTRICTED TRAVEL FOR TRAINING / EVENTS / CONFERENCES AND AIR TRAVEL.

- As detailed on the following slide there are some statistically significant differences by region. The most notable are:
  - Organizations in New England are more likely than others to have limited travel for training / events / conferences, air travel and client-related travel.
  - Organizations in the West North Central are more likely than others to have limited air travel.
  - Organizations in the South Atlantic are more likely than others to have limited nearly all types of travel.
  - Organizations in the East South Central are less likely than others to have limited nearly all types of travel.

### International Travel Restrictions Due to COVID-19

<table>
<thead>
<tr>
<th>Travel Category</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Travel for training / events / conferences</td>
<td>35%</td>
</tr>
<tr>
<td>Air travel</td>
<td>34%</td>
</tr>
<tr>
<td>Client-related travel</td>
<td>22%</td>
</tr>
<tr>
<td>Use of mass transit (trains, busses, etc.)</td>
<td>21%</td>
</tr>
<tr>
<td>Car rentals</td>
<td>15%</td>
</tr>
<tr>
<td>Use of ground transportation (Uber, Lyft, taxi, etc.)</td>
<td>14%</td>
</tr>
<tr>
<td>Other</td>
<td>3%</td>
</tr>
<tr>
<td>None of the above / We don’t normally travel internationally</td>
<td>60%</td>
</tr>
</tbody>
</table>

n = 783

Q2. As a result of COVID-19, which of the following, if any, has your company restricted or prohibited regarding international travel? Select All That Apply
## INTERNATIONAL TRAVEL RESTRICTIONS DUE TO COVID-19
### BY GEOGRAPHIC REGION

<table>
<thead>
<tr>
<th>Total</th>
<th>New England</th>
<th>Middle Atlantic</th>
<th>East North Central</th>
<th>West North Central</th>
<th>South Atlantic</th>
<th>East South Central</th>
<th>West South Central</th>
<th>Mountain</th>
<th>West</th>
</tr>
</thead>
<tbody>
<tr>
<td>Travel for training / events / conferences</td>
<td>35%</td>
<td>47%</td>
<td>37%</td>
<td>33%</td>
<td>45%</td>
<td>40%</td>
<td>27%</td>
<td>35%</td>
<td>30%</td>
</tr>
<tr>
<td>Air travel</td>
<td>34%</td>
<td>44%</td>
<td>35%</td>
<td>29%</td>
<td>36%</td>
<td>41%</td>
<td>24%</td>
<td>31%</td>
<td>31%</td>
</tr>
<tr>
<td>Client-related travel</td>
<td>22%</td>
<td>29%</td>
<td>26%</td>
<td>21%</td>
<td>24%</td>
<td>30%</td>
<td>16%</td>
<td>17%</td>
<td>18%</td>
</tr>
<tr>
<td>Use of mass transit (trains, busses, etc.)</td>
<td>21%</td>
<td>24%</td>
<td>23%</td>
<td>14%</td>
<td>18%</td>
<td>28%</td>
<td>16%</td>
<td>22%</td>
<td>18%</td>
</tr>
<tr>
<td>Car rentals</td>
<td>15%</td>
<td>15%</td>
<td>15%</td>
<td>9%</td>
<td>13%</td>
<td>24%</td>
<td>10%</td>
<td>11%</td>
<td>16%</td>
</tr>
<tr>
<td>Use of ground transportation (Uber, Lyft, taxi, etc.)</td>
<td>14%</td>
<td>15%</td>
<td>13%</td>
<td>10%</td>
<td>13%</td>
<td>22%</td>
<td>10%</td>
<td>14%</td>
<td>12%</td>
</tr>
<tr>
<td>Other</td>
<td>3%</td>
<td>3%</td>
<td>2%</td>
<td>1%</td>
<td>4%</td>
<td>4%</td>
<td>0%</td>
<td>3%</td>
<td>5%</td>
</tr>
<tr>
<td>None of the above / We don't normally travel internationally</td>
<td>60%</td>
<td>53%</td>
<td>60%</td>
<td>64%</td>
<td>53%</td>
<td>54%</td>
<td>69%</td>
<td>61%</td>
<td>64%</td>
</tr>
</tbody>
</table>

**Indicates significantly higher percentage**

**Indicates significantly lower percentage**

Q2. As a result of COVID-19, which of the following, if any, has your company restricted or prohibited regarding international travel? Select All That Apply

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Most organizations have implemented some type of domestic travel restrictions (71%), most notably for training / events / conferences (66%) and air travel (52%).

- As detailed on the following slide there are many statistically significant differences by region. Some general take-aways are:
  - Travel restrictions in New England, the Middle Atlantic and the West North Central areas are generally higher than other areas.
  - Travel restrictions in East South Central, West South Central and the Mountain areas are generally lower than other areas.

### Domestic Travel Restrictions Due to COVID-19

- Travel for training / events / conferences: 66%
- Air travel: 52%
- Client-related travel: 31%
- Use of mass transit (trains, busses, etc.): 27%
- Use of ground transportation (Uber, Lyft, taxi, etc.): 15%
- Car rentals: 15%
- Other: 7%
- None of the above: 29%

Q3. As a result of COVID-19, which of the following, if any, has your company restricted or prohibited regarding domestic travel? Select All That Apply.
**Q3. As a result of COVID-19, which of the following, if any, has your company restricted or prohibited regarding domestic travel? Select All That Apply**

<table>
<thead>
<tr>
<th>Travel for training / events / conferences</th>
<th>Total</th>
<th>New England</th>
<th>Middle Atlantic</th>
<th>East North Central</th>
<th>West North Central</th>
<th>South Atlantic</th>
<th>East South Central</th>
<th>West South Central</th>
<th>Mountain</th>
<th>West</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>66%</td>
<td>74%</td>
<td>77%</td>
<td>68%</td>
<td>75%</td>
<td>67%</td>
<td>57%</td>
<td>62%</td>
<td>59%</td>
<td>62%</td>
</tr>
<tr>
<td>Air travel</td>
<td>52%</td>
<td>68%</td>
<td>60%</td>
<td>46%</td>
<td>53%</td>
<td>59%</td>
<td>45%</td>
<td>46%</td>
<td>45%</td>
<td>50%</td>
</tr>
<tr>
<td>Client-related travel</td>
<td>31%</td>
<td>29%</td>
<td>40%</td>
<td>38%</td>
<td>31%</td>
<td>35%</td>
<td>18%</td>
<td>23%</td>
<td>31%</td>
<td>32%</td>
</tr>
<tr>
<td>Use of mass transit (trains, busses, etc.)</td>
<td>27%</td>
<td>35%</td>
<td>37%</td>
<td>20%</td>
<td>27%</td>
<td>32%</td>
<td>22%</td>
<td>26%</td>
<td>21%</td>
<td>26%</td>
</tr>
<tr>
<td>Use of ground transportation (Uber, Lyft, taxi, etc.)</td>
<td>15%</td>
<td>24%</td>
<td>16%</td>
<td>9%</td>
<td>16%</td>
<td>18%</td>
<td>14%</td>
<td>12%</td>
<td>14%</td>
<td>18%</td>
</tr>
<tr>
<td>Car rentals</td>
<td>15%</td>
<td>26%</td>
<td>18%</td>
<td>10%</td>
<td>13%</td>
<td>19%</td>
<td>8%</td>
<td>8%</td>
<td>16%</td>
<td>19%</td>
</tr>
<tr>
<td>Other</td>
<td>7%</td>
<td>6%</td>
<td>10%</td>
<td>9%</td>
<td>7%</td>
<td>9%</td>
<td>0%</td>
<td>4%</td>
<td>5%</td>
<td>9%</td>
</tr>
<tr>
<td>None of the above</td>
<td>29%</td>
<td>21%</td>
<td>19%</td>
<td>28%</td>
<td>20%</td>
<td>25%</td>
<td>41%</td>
<td>33%</td>
<td>36%</td>
<td>29%</td>
</tr>
</tbody>
</table>

Indicates significantly higher percentage

Indicates significantly lower percentage

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WORKSTYLE IMPACTS
FEWER THAN HALF OF ORGANIZATIONS (46%) HAVE CHANGED THEIR LEAVE POLICY. MOST NOTABLE AMONG THESE ARE EMERGENCY PAID LEAVE (23%) OR UNPAID LEAVE (13%) FOR THOSE WHO BECOME SICK, MUST SELF-QUARANTINE OR CARE FOR OTHERS.

- As detailed on the following slide there is one region in particular with statistically significant differences.
- Organizations in New England are the most likely to have implemented changes to their leave policy in the wake of COVID-19.

**Leave Policy Changes**

- Emergency paid leave for sick, self-quarantine, care for others: 23%
- Emergency unpaid leave for sick, self-quarantine, care for others: 13%
- Encouraging employees to donate their paid leave to others who need it: 5%
- Increased the number of paid leave hours to each employee: 6%
- Increased the number of unpaid leave hours to each employee: 4%
- We already have an unrestricted leave policy: 13%
- Other: 12%
- None of the above: 41%

Q5. Which of the following, if any, has your company implemented regarding its leave policy? Select All That Apply

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### LEAVE POLICY CHANGES BY GEOGRAPHIC REGION

<table>
<thead>
<tr>
<th>Change</th>
<th>Total</th>
<th>New England</th>
<th>Middle Atlantic</th>
<th>East North Central</th>
<th>West North Central</th>
<th>South Atlantic</th>
<th>East South Central</th>
<th>West South Central</th>
<th>Mountain</th>
<th>West</th>
</tr>
</thead>
<tbody>
<tr>
<td>Emergency paid leave for sick, self-quarantine, care for others</td>
<td>23%</td>
<td>35%</td>
<td>23%</td>
<td>19%</td>
<td>21%</td>
<td>26%</td>
<td>24%</td>
<td>21%</td>
<td>24%</td>
<td>20%</td>
</tr>
<tr>
<td>Emergency unpaid leave for sick, self-quarantine, care for others</td>
<td>13%</td>
<td>15%</td>
<td>10%</td>
<td>14%</td>
<td>11%</td>
<td>12%</td>
<td>14%</td>
<td>13%</td>
<td>16%</td>
<td>15%</td>
</tr>
<tr>
<td>Encouraging employees to donate their paid leave to others who need it</td>
<td>5%</td>
<td>18%</td>
<td>7%</td>
<td>4%</td>
<td>2%</td>
<td>4%</td>
<td>6%</td>
<td>6%</td>
<td>5%</td>
<td>3%</td>
</tr>
<tr>
<td>Increased the number of paid leave hours to each employee</td>
<td>6%</td>
<td>3%</td>
<td>10%</td>
<td>6%</td>
<td>5%</td>
<td>4%</td>
<td>4%</td>
<td>6%</td>
<td>4%</td>
<td>8%</td>
</tr>
<tr>
<td>Increased the number of unpaid leave hours to each employee</td>
<td>4%</td>
<td>12%</td>
<td>5%</td>
<td>6%</td>
<td>4%</td>
<td>3%</td>
<td>4%</td>
<td>1%</td>
<td>5%</td>
<td>7%</td>
</tr>
<tr>
<td>We already have an unrestricted leave policy</td>
<td>13%</td>
<td>18%</td>
<td>10%</td>
<td>7%</td>
<td>5%</td>
<td>9%</td>
<td>12%</td>
<td>17%</td>
<td>19%</td>
<td>18%</td>
</tr>
<tr>
<td>Other</td>
<td>12%</td>
<td>12%</td>
<td>16%</td>
<td>7%</td>
<td>13%</td>
<td>12%</td>
<td>10%</td>
<td>9%</td>
<td>17%</td>
<td>16%</td>
</tr>
<tr>
<td>None of the above</td>
<td>41%</td>
<td>26%</td>
<td>44%</td>
<td>56%</td>
<td>52%</td>
<td>47%</td>
<td>33%</td>
<td>41%</td>
<td>31%</td>
<td>31%</td>
</tr>
</tbody>
</table>

**Indicates significantly higher percentage**

**Indicates significantly lower percentage**

Q5. Which of the following, if any, has your company implemented regarding its leave policy? Select All That Apply
EIGHT OUT OF TEN ORGANIZATIONS HAVE IMPLEMENTED SOME TYPE OF TELEWORK POLICY. THE MOST COMMON ARE ALLOWING EMPLOYEES TO WORK FROM HOME AS NEEDED (34%) OR ENCOURAGING TELEWORK IF POSSIBLE (30%).

- As detailed on the following slide there are some statistically significant differences by region. The most notable are:
  - Organizations in **New England** and the **Middle Atlantic** are more likely than others to encourage working from home, if possible, or mandating telework.
  - Although a majority of organizations in the **West North Central**, **East South Central** and **West South Central** have made policy changes, they are somewhat less likely to have made them compared to other regions.

### Telework / Work From Home Policy

<table>
<thead>
<tr>
<th>Policy Description</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>We are allowing employees to work from home as needed</td>
<td>34%</td>
</tr>
<tr>
<td>We are encouraging all employees to work from home, if possible, but it's not mandatory</td>
<td>30%</td>
</tr>
<tr>
<td>We are requiring certain employees to work from home due to potential exposure / health reasons</td>
<td>7%</td>
</tr>
<tr>
<td>We have made it mandatory to work from home until otherwise notified</td>
<td>8%</td>
</tr>
<tr>
<td>Other</td>
<td>1%</td>
</tr>
<tr>
<td>We have not changed our policy; it is business as usual</td>
<td>20%</td>
</tr>
</tbody>
</table>

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### Q4. Which one of the following best describes your current telework / work from home policy?

<table>
<thead>
<tr>
<th>Policy Description</th>
<th>Total</th>
<th>New England</th>
<th>Middle Atlantic</th>
<th>East North Central</th>
<th>West North Central</th>
<th>South Atlantic</th>
<th>East South Central</th>
<th>West South Central</th>
<th>Mountain</th>
<th>West</th>
</tr>
</thead>
<tbody>
<tr>
<td>We are allowing employees to work from home as needed</td>
<td>34%</td>
<td>24%</td>
<td>29%</td>
<td>38%</td>
<td>43%</td>
<td>37%</td>
<td>39%</td>
<td>30%</td>
<td>36%</td>
<td>28%</td>
</tr>
<tr>
<td>We are encouraging all employees to work from home, if possible, but it's not mandatory</td>
<td>30%</td>
<td>50%</td>
<td>37%</td>
<td>34%</td>
<td>21%</td>
<td>29%</td>
<td>20%</td>
<td>22%</td>
<td>33%</td>
<td>30%</td>
</tr>
<tr>
<td>We are requiring certain employees to work from home due to potential exposure / health reasons</td>
<td>7%</td>
<td>3%</td>
<td>8%</td>
<td>6%</td>
<td>4%</td>
<td>8%</td>
<td>10%</td>
<td>13%</td>
<td>6%</td>
<td>7%</td>
</tr>
<tr>
<td>We have made it mandatory to work from home until otherwise notified</td>
<td>8%</td>
<td>15%</td>
<td>16%</td>
<td>9%</td>
<td>5%</td>
<td>6%</td>
<td>2%</td>
<td>2%</td>
<td>4%</td>
<td>15%</td>
</tr>
<tr>
<td>Other, please specify</td>
<td>1%</td>
<td>0%</td>
<td>2%</td>
<td>0%</td>
<td>0%</td>
<td>2%</td>
<td>0%</td>
<td>0%</td>
<td>1%</td>
<td>3%</td>
</tr>
<tr>
<td>We have not changed our policy; it is business as usual</td>
<td>20%</td>
<td>9%</td>
<td>8%</td>
<td>14%</td>
<td>27%</td>
<td>18%</td>
<td>29%</td>
<td>34%</td>
<td>20%</td>
<td>17%</td>
</tr>
</tbody>
</table>

**Indicates significantly higher percentage**

**Indicates significantly lower percentage**

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NEARLY ALL ORGANIZATIONS (96%) HAVE IMPLEMENTED CHANGES TO THE WAY THEY ARE CONDUCTING CLIENT WORK. TOP AMONG THESE ARE SOCIAL DISTANCING (77%) AND VIRTUAL WORK (73%).

• As detailed on the following slide there are some statistically significant differences by region. The most notable are:
  • Organizations in the **Northeast** and the **Midwest** regions are more likely than others to have implemented various measures.
  • Organizations in the **South** and **West** regions are somewhat less likely to have made certain changes compared to other regions.

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**METHODS OF WORKING WITH CLIENTS TO ENSURE WORK CONTINUATION BY GEOGRAPHIC REGION**

<table>
<thead>
<tr>
<th>Method</th>
<th>Total</th>
<th>New England</th>
<th>Middle Atlantic</th>
<th>East North Central</th>
<th>West North Central</th>
<th>South Atlantic</th>
<th>East South Central</th>
<th>West South Central</th>
<th>Mountain</th>
<th>West</th>
</tr>
</thead>
<tbody>
<tr>
<td>Ensuring social distancing to reduce risk factors</td>
<td>77%</td>
<td>94%</td>
<td>79%</td>
<td>81%</td>
<td>88%</td>
<td>72%</td>
<td>84%</td>
<td>73%</td>
<td>68%</td>
<td>74%</td>
</tr>
<tr>
<td>Allowing virtual-work opportunities</td>
<td>73%</td>
<td>82%</td>
<td>81%</td>
<td>76%</td>
<td>75%</td>
<td>76%</td>
<td>45%</td>
<td>66%</td>
<td>74%</td>
<td>76%</td>
</tr>
<tr>
<td>Limiting access to offices, project and constructions sites, and group</td>
<td>52%</td>
<td>68%</td>
<td>58%</td>
<td>49%</td>
<td>50%</td>
<td>47%</td>
<td>41%</td>
<td>53%</td>
<td>45%</td>
<td>62%</td>
</tr>
<tr>
<td>Focusing on meeting and project site hygiene</td>
<td>52%</td>
<td>47%</td>
<td>40%</td>
<td>61%</td>
<td>64%</td>
<td>55%</td>
<td>59%</td>
<td>47%</td>
<td>49%</td>
<td>45%</td>
</tr>
<tr>
<td>Continuing onsite engagement (as permitted within travel policies)</td>
<td>46%</td>
<td>53%</td>
<td>53%</td>
<td>46%</td>
<td>46%</td>
<td>47%</td>
<td>51%</td>
<td>45%</td>
<td>45%</td>
<td>40%</td>
</tr>
<tr>
<td>Implementing site restrictions</td>
<td>23%</td>
<td>44%</td>
<td>21%</td>
<td>20%</td>
<td>23%</td>
<td>24%</td>
<td>16%</td>
<td>20%</td>
<td>19%</td>
<td>23%</td>
</tr>
<tr>
<td>Other</td>
<td>4%</td>
<td>3%</td>
<td>5%</td>
<td>2%</td>
<td>2%</td>
<td>3%</td>
<td>6%</td>
<td>4%</td>
<td>4%</td>
<td>4%</td>
</tr>
<tr>
<td>None of the above</td>
<td>4%</td>
<td>3%</td>
<td>5%</td>
<td>2%</td>
<td>0%</td>
<td>4%</td>
<td>2%</td>
<td>6%</td>
<td>7%</td>
<td>2%</td>
</tr>
</tbody>
</table>

*Indicates significantly higher percentage*

*Indicates significantly lower percentage*

Q6. In which of the following ways, if any, are you working with your client counterparts to ensure projects can be executed and work can continue? Select All That Apply
BUSINESS IMPACTS
VERY FEW ORGANIZATIONS (4%) REPORT PROBLEMS WITH PUBLIC CLIENTS DUE TO PROTECTIVE MEASURES CONFLICTING WITH CONTRACT TERMS.

- Although percentages vary by region, there are no statistically significant differences:
  - New England = 6% “Yes”
  - Middle Atlantic = 6%
  - East North Central = 6%
  - West North Central = 4%
  - South Atlantic = 3%
  - East South Central = 2%
  - West South Central = 5%
  - Mountain = 6%
  - West = 2%

Q7. Has your company experienced problems with public clients when protective measures may conflict with contract terms?
ROUGHLY ONE-FOURTH OF ORGANIZATIONS (24%) REPORT DELAYS IN RFPS/RFQS OR AWARDS DUE TO COVID-19.

- Although percentages vary by region, only one region has a statistically significant difference:
  - New England = 18% “Yes”
  - Middle Atlantic = 35%  
  - East North Central = 24%
  - West North Central = 25%
  - South Atlantic = 23%
  - East South Central = 21%
  - West South Central = 28%
  - Mountain = 23%
  - West = 22%

Q9. Is your firm experiencing delays in the issuance of RFPs/RFQs or awards as a result of COVID-19?
NEARLY HALF OF ORGANIZATIONS (44%) REPORT PROJECT DELAYS OR CANCELLATIONS DUE TO COVID-19.

• Although percentages vary by region, only one region has a statistically significant difference:
  • New England = 52% “Yes”
  • Middle Atlantic = 52%
  • East North Central = 40%
  • West North Central = 39%
  • South Atlantic = 43%
  • East South Central = 33%
  • West South Central = 38%
  • Mountain = 47%
  • West = 50%

Q8. Is your firm experiencing project delays or cancellations as a result of COVID-19?
OTHER IMPACTS
WHEN ASKED TO DESCRIBE ANY OTHER BUSINESS ISSUES THAT ORGANIZATIONS ARE EXPERIENCING RELATED TO COVID-19
RESPONDENTS ANSWERS FELL INTO SEVERAL MAIN CATEGORIES:

• Significant interest in what will pass Congress and how it will affect their business - particularly small firms
• Many not experiencing major project delays as of now but expecting that to change
• Worry that work will slow - starting to see it happening
• Worry that clients will pay more slowly (particularly public clients) or not at all - starting to see it happening
• Office going remote resulting in uncertainty of workflow
• General employee distraction due to depth of crisis and rate of change
• Economic uncertainty
RESEARCH CONDUCTED BY

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METHODOLOGY

- The Institute for Association and Nonprofit Research (IFANR) invited individuals from among the database list of member companies provided by the American Council of Engineering Companies (ACEC) to participate in this survey. One invitation was sent per member company.
  - Data collection occurred on March 17 and 18, 2020.
  - A total of 3,456 invitations were emailed, although 294 bounced and 17 opted-out, resulting in a total of 3,145 potential respondents.
  - Individuals who did not respond to the first email were sent one follow-up reminder.
  - In all, 794 individuals responded to the email invitations for an overall response rate of 23%.
- Individuals could respond using a laptop/desktop computer, tablet or smartphone; 12% of respondents completed the survey using a mobile device.
- Throughout this report meaningful, statistically significant differences are noted by geographic region.
Statistically significant differences are evaluated at a 95% confidence interval (for a description of tests used, please see the Appendix).

There is no margin of sampling error as this was a census of all individuals in the ACEC database.

Although every effort was taken to minimize survey bias, there is no way to completely eliminate all sources of potential bias. Sources of potential bias include, but are not limited to, the following:

- Non-response bias
- Confounding bias
- Question wording bias
- Question order bias
- Habituation
- Sponsor bias
- Confirmation bias