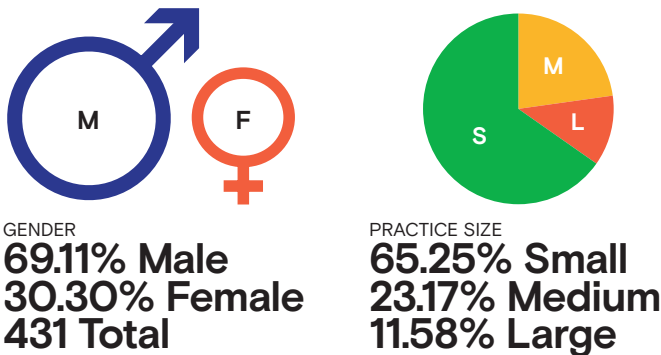


National COVID-19 Member Survey Results

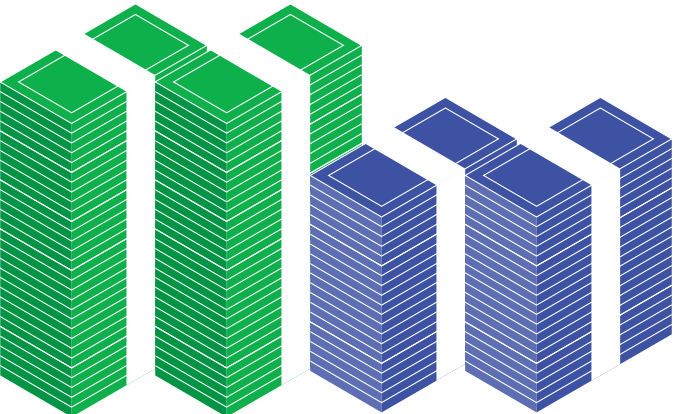
In June 2020 we surveyed 430 of our members to determine the affects of COVID-19 on the architecture profession. A substantial slowdown in projects and measurable shifts in employment were the biggest pandemic-driven changes, revealing the need for greater support for architects and the wider built environment profession.

JULIA CAMBAGE
CEO, AUSTRALIAN INSTITUTE OF ARCHITECTS

RESPONDENTS



GOVERNMENT SUPPORT



Have the government initiatives been helpful?

61.81%

Of respondents reported having accessed jobkeeper for either themselves or by their employer.

JOB KEEPER

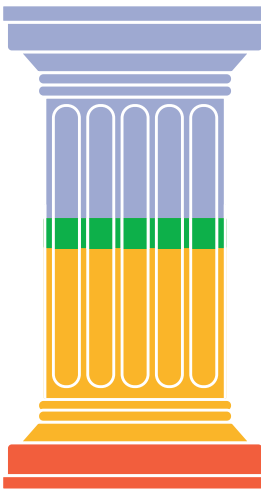
63.11%

Of survey respondents found government relief initiatives have been extremely or somewhat helpful.



GOVERNMENT PROJECTS

Practices which rely on Government funded architecture projects



53.6%

of practices rely on government work

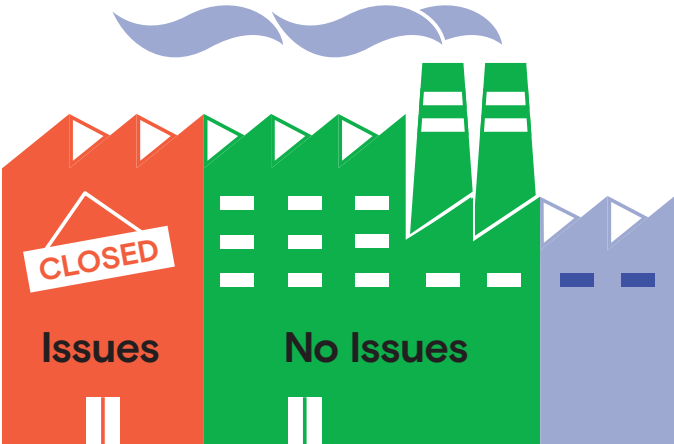
50.0%

of these would be significantly impacted by a slowed pipeline

9.60%

may no longer be viable at all

SUPPLY CHAIN ISSUES



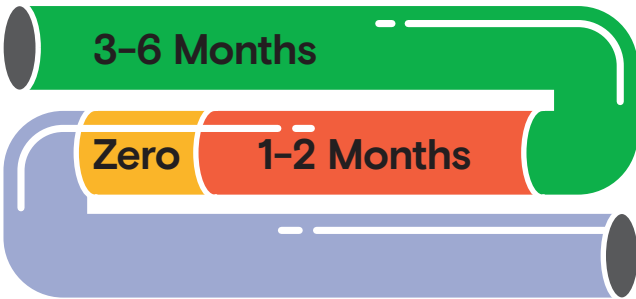
Has Covid-19 caused supply chain issues?

30.39% Having Supply Chain Issues

Caused by - delays from importing building materials from overseas - including, carpet, tiles, Joinery, stone, steel, light fittings, windows, furniture and building facades, computers and equipment. Also, IT issues (4.42%)

54.54% No Supply Chain Issues

MONTHS OF WORK IN PIPELINE



44.28% 3-6 months of work in the pipeline

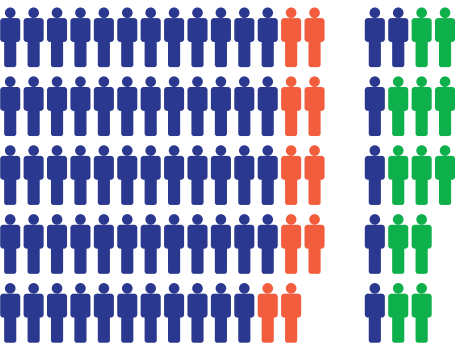
23.54% 1-2 months of work in the pipeline

6.08% 0 months of work in the pipeline

EMPLOYMENT STATUS

Full-Time Employment Decreased
69.09%
↓ 59.72%

Part-Time Employment Increased
5.85%
↑ 13.58%



EMPLOYMENT CHANGE

11.68%
27.27%

Of the respondents indicated a change in their employment status as a result of COVID-19

Of respondents indicated that their practice had been forced to lay off or stand down staff



12.50%
12.50%
12.50%

Interestingly, there were no reported part-time employees prior to COVID-19 for large sized practices, this figure increased to 12.50% as a result of COVID-19

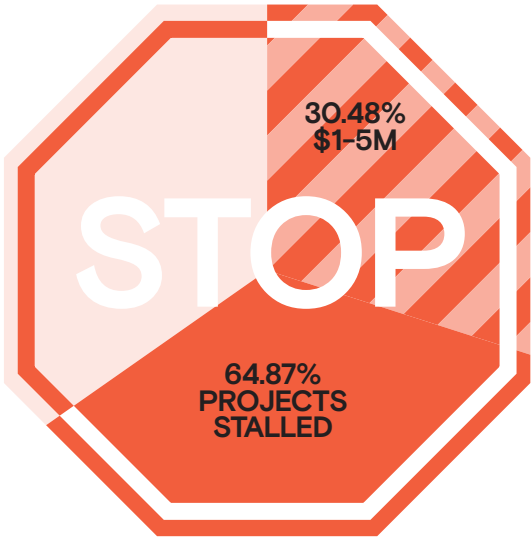
PROJECT STATUS

Have projects stalled?

64.87%
30.48%

of respondents reported they have had projects that have stalled as a result of COVID-19

Of respondents reported stalled projects having a dollar value of between \$1 - 5 Million



PROJECT PROGRESS

Covid-19 links preventing projects from progressing

7.33%
10.34%
23.28%
30.17%

Lack of investor confidence

Slow financing approvals from banks

Client financing issues, too nervous to commit

delays from government approvals.