COVID-19 WATER SECTOR IMPACT SURVEY (MARCH 10-16, 2020)
Overview: AWWA surveyed utilities and other sector organizations to gauge the initial impacts of COVID-19 and actions being taken to manage risk and plan for contingencies. The results represent a snapshot of time of the survey period below. AWWA is planning to re-survey the week of March 22 to see how the landscape is changing in this rapidly evolving situation.


Response Summary:

- Total Responses: 495
- Utility Responses: 335
- Unique Utilities: 286
- Non-Utility Responses*: 160

Margin of Error: +/- 6% utility responses
+/- 8% non-utility respondents

Confidence Level: 95%

Key Takeaways:

- Eighty-two percent of utilities have business continuity plans (BCPs) in place or are in the process of developing them. 10% have plans to develop BCPs.

- Absenteeism/continuity of operations is the top concern for all respondents.

- Some supply chain concerns are anticipated.

- No adverse affects on budget, revenue, or spending restrictions for a majority of utilities at this time.

- COVID-19 is affecting water professionals’ personal decisions, including more likely to minimize business travel, work from home (if any option), and use sick days if experiencing cold/flu symptoms.

*Non-Utility includes consultants, manufacturer & related, academic/nonprofit, government, and other
PLEASE INDICATE WHICH OF THE BELOW YOUR ORGANIZATION HAS IN PLACE OR IS DEVELOPING TO MANAGE RISK/PLAN FOR CONTINGENCIES DUE TO COVID-19

Status of Business Continuity Plan - Utilities

- Currently in Place: 55%
- Currently in development: 27%
- Planning on developing: 10%
- No plans to put in place/develop: 8%

N=290
PLEASE INDICATE WHICH OF THE BELOW YOUR ORGANIZATION HAS IN PLACE OR IS DEVELOPING TO MANAGE RISK/PLAN FOR CONTINGENCIES DUE TO COVID-19

Planning for Managing Risk and Contingencies (Utilities)

<table>
<thead>
<tr>
<th>Activity</th>
<th>Currently in Place</th>
<th>Currently in development</th>
<th>Planning on developing</th>
<th>No plans to put in place/develop</th>
</tr>
</thead>
<tbody>
<tr>
<td>Business Continuity Plan</td>
<td>55%</td>
<td>27%</td>
<td>10%</td>
<td>8%</td>
</tr>
<tr>
<td>Travel restrictions</td>
<td>23%</td>
<td>16%</td>
<td>13%</td>
<td></td>
</tr>
<tr>
<td>Work from home/telework policy for non-field employees</td>
<td>25%</td>
<td>32%</td>
<td>16%</td>
<td></td>
</tr>
<tr>
<td>Plan to continue operations for field employees or those who can't work from home</td>
<td>27%</td>
<td>16%</td>
<td>13%</td>
<td></td>
</tr>
<tr>
<td>Plan to make sure workplaces are clean and hygienic</td>
<td>72%</td>
<td>17%</td>
<td>7%</td>
<td>4%</td>
</tr>
</tbody>
</table>

N=290
Please indicate which of the below your organization has in place or is developing to manage risk/plan for contingencies due to COVID-19.

Planning for Managing Risk and Contingencies (Consultant, Manufacturer & Related)

- Business Continuity Plan: 42% (Currently in Place), 23% (Currently in Development), 20% (Planning on Developing), 14% (No Plans to Put in Place/Develop)
- Travel restrictions: 51% (Currently in Place), 16% (Currently in Development), 10% (Planning on Developing), 23% (No Plans to Put in Place/Develop)
- Work from home/telework policy for non-field employees: 55% (Currently in Place), 27% (Currently in Development), 9% (Planning on Developing), 10% (No Plans to Put in Place/Develop)
- Plan to continue operations for field employees or those who can't work from home: 43% (Currently in Place), 30% (Currently in Development), 17% (Planning on Developing), 10% (No Plans to Put in Place/Develop)
- Plan to make sure workplaces are clean and hygienic: 76% (Currently in Place), 9% (Currently in Development), 8% (Planning on Developing), 8% (No Plans to Put in Place/Develop)
WHAT CHALLENGES TO SUSTAINING BUSINESS OPERATIONS IS YOUR ORGANIZATION ANTICIPATING DUE TO COVID-19? (SELECT ALL THAT APPLY)

**Anticipated Challenges to Sustaining Business Operations (Utilities)**

- Absenteeism/continuity of operations: 75%
- Impacts on field operations (meter reading, repairs etc): 46%
- Supply chain treatment chemicals: 44%
- Supply chain for Personnel Protective Equipment (PPE): 33%
- Supply chain for product raw materials: 17%
- Other: 7%
- None of the above: 10%

*N=316 – totals will not add to 100% due to multiple select question*

**Anticipated Challenges to Sustaining Business Operations (Consultant, Manufacturer & Related)**

- Absenteeism/continuity of operations: 53%
- Impacts on field operations (meter reading, repairs etc): 15%
- Supply chain treatment chemicals: 3%
- Supply chain for Personnel Protective Equipment (PPE): 22%
- Supply chain for product raw materials: 8%
- Other: 22%
- None of the above: 15%

*N=87 – totals will not add to 100% due to multiple select question*
WHICH OF THE FOLLOWING BEST DESCRIBES YOUR ORGANIZATION'S TRAVEL RESTRICTIONS? (SELECT ALL THAT APPLY)

**Type of Travel Restrictions in Place (Utilities)**

- 37% All non-essential business travel restricted
- 18% All international travel restricted
- 16% Out-of-state travel (domestic) restricted
- 13% International travel to specific countries/regions restricted
- 7% All air travel banned
- 6% Other
- 4% Only top management/executives can travel

**Type of Travel Restrictions in Place (Consultant, Manufacturer & Related)**

- 47% All non-essential business travel restricted
- 15% All international travel restricted
- 8% Out-of-state travel (domestic) restricted
- 15% International travel to specific countries/regions restricted
- 7% All air travel banned
- 5% Other
- 3% Only top management/executives can travel

Non-essential travel includes: Conferences, trainings, meetings that can be done remote, etc.
DO YOU FEEL THERE ARE ENOUGH RESOURCES TO HELP YOUR ORGANIZATION DEVELOP A BUSINESS CONTINUITY PLAN?

A few suggestions added in open end text box for this question:

"Yes, but would be curious to know what other organizations are doing as well"

"Plan yes, but implementing is a question"
IS COVID-19 CURRENTLY OR POTENTIALLY PRESENTING ANY BUDGETARY, REVENUE, OR SPENDING REDUCTIONS?

Anticipated Effects on Budget, Revenue, or Spending Reductions

Utilities
- Yes: 14%
- No: 86%

Consultant, Manufacturer & Related
- Yes: 48%
- No: 52%

N=265
N=63
DESPITE ANY OF YOUR ORGANIZATION'S OFFICIAL POLICIES, IS COVID-19 PERSONALLY IMPACTING THE LIKELIHOOD THAT YOU WILL . . . ?

**Effects on Personal Decision Making (All Respondents)**

*N=488*
QUESTIONS?

Contact Greg Kail, AWWA Director of Communications, gkail@awwa.org