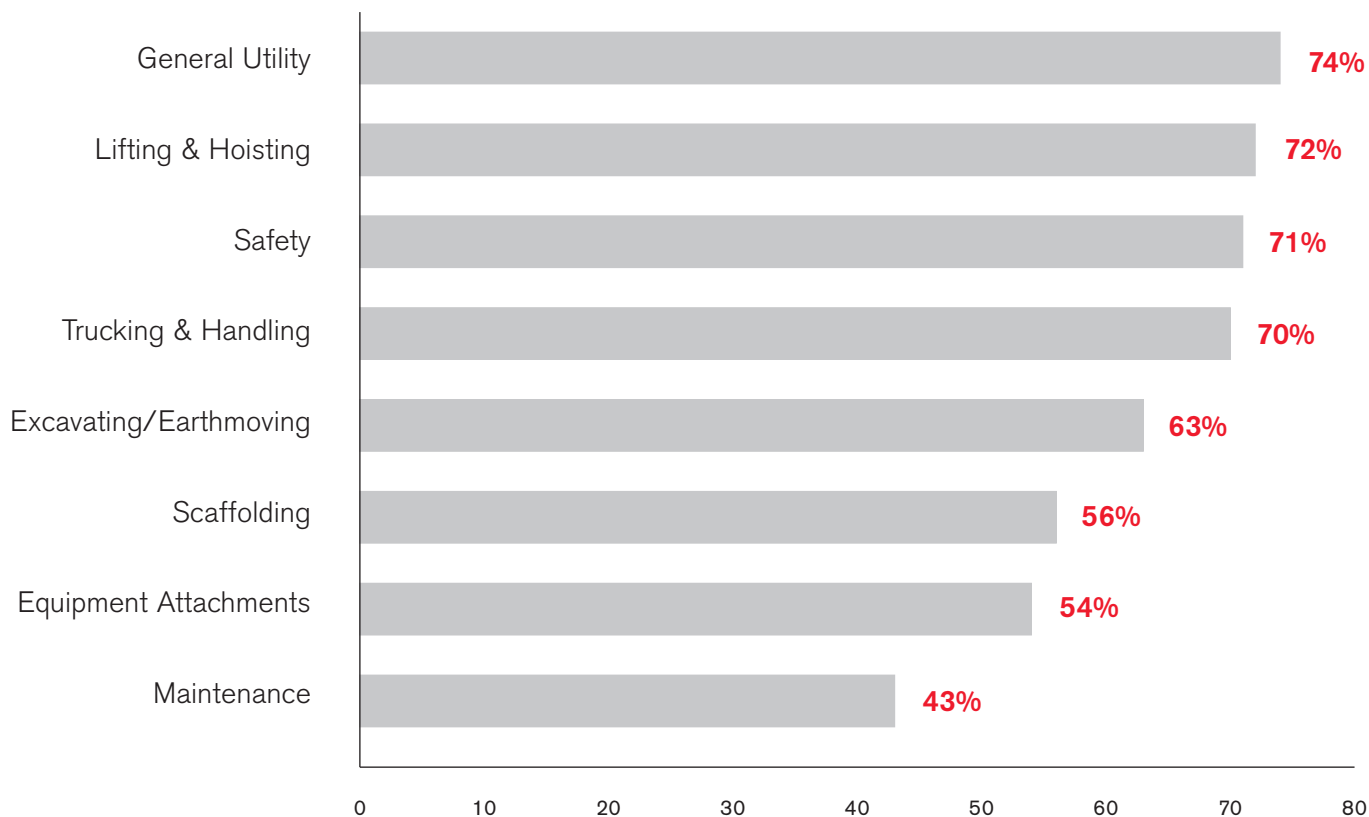




ENR Delivers the Market... 86% of ENR Contractors' Firms Purchase, Rent or Lease Construction Equipment

ENR Contractors Involvement



Of those contractors whose firms purchase, rent or lease heavy equipment, 68% are involved in the purchasing decision.

Source: Summit Research Group, 2002 ENR Equipment Study



ENR Reaches the Right Audience for Manufacturers of **Building Products and Materials**

- **78%** of contractors are involved in **building construction**
- **63%** are involved in the purchasing decision of **building products and materials**
- **43%** are **senior level** management
- **83%** rated “buildings” editorial good or excellent – highest of all editorial features

Source: Taylor Nelson Sofres Intersearch, 2002 *ENR* Subscriber Study



ENR Delivers the Market ...

87% of *ENR* subscribers are personally involved in purchasing decisions for **construction services**

	Owners	Contractors	Engineers	Total
Total Services	80%	87%	89%	87%
Construction services	57	68	48	62
Construction management	54	61	49	57
Design services	55	52	58	54

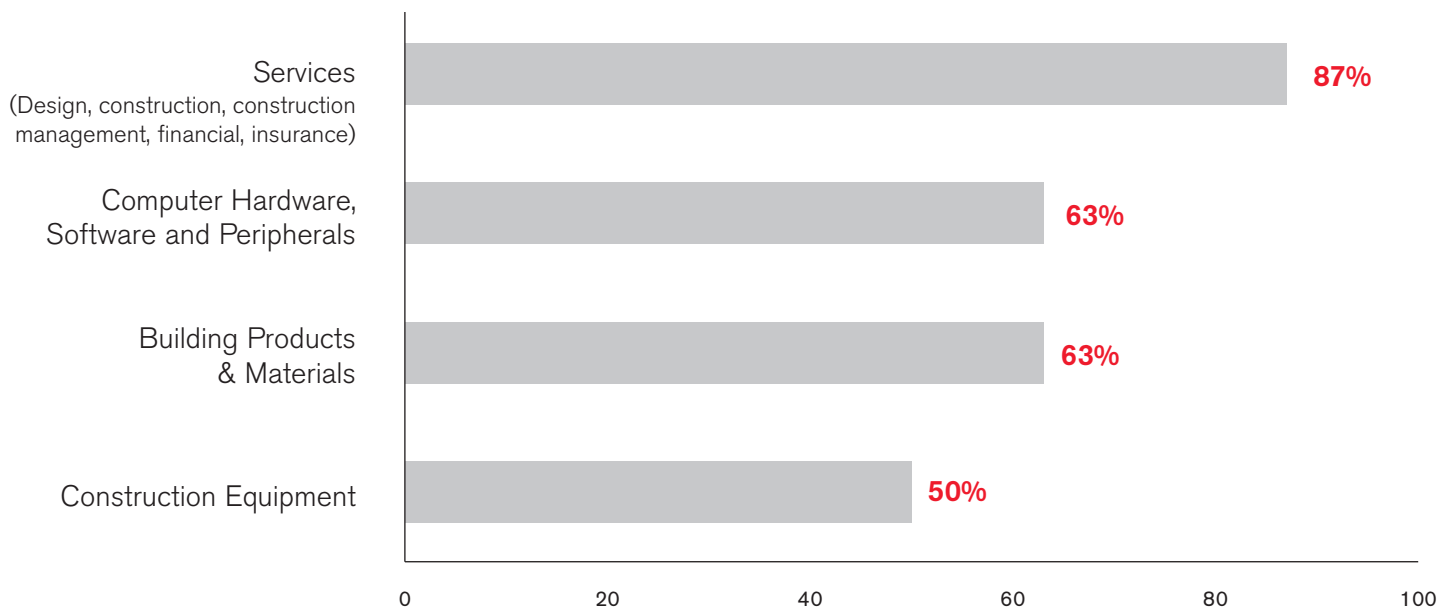
Source: Taylor Nelson Sofres Intersearch, 2002 *ENR* Subscriber Study

41% of *ENR* subscribers are personally involved in purchasing decisions for **insurance and financial services**



ENR Delivers the Market...

91% of *ENR* subscribers are personally involved in the purchasing decision for **products and services**



ENR is an unrivaled resource for selling products and services to the construction industry, because it reaches the entire industry.

Source: Taylor Nelson Sofres Intersearch, 2002 *ENR* Subscriber Study

The Construction Industry is Collaborative



In today's construction industry three teams – **owners, contractors and engineers** – are involved in making purchase decisions.

Owners: The people who need the projects built (i.e., Intel, General Motors, PG&E)

- Private firms and government agencies that need to construct, renovate and manage facilities
- Construction managers who work at owner firms

Contractors: The people who build the projects (i.e., Fluor Daniel, J.A. Jones Construction, EMCOR Group)

- General contractors, construction managers, and subcontractors take the project from design to reality
- Where much of the actual buying and selling occurs:
 - buy material or implement methods to reduce costs or speed the job
 - oversee equipment requirements
 - write contracts with general and specialty contractors
 - issue orders to purchase materials

Engineers/Design Firms: The people who design the projects (i.e., Bechtel, Parsons Brinckerhoff, Foster Wheeler)

- Engineers design the projects to meet owner's needs. For infrastructure and civil, the lead designer is an engineering firm.
- Responsible for major elements of buildings, including structural and mechanical/electrical systems
- The most critical members for the selection and specification of products and materials for projects.

Spending for Construction Continues...

For 2002, it was estimated that the value of new construction would stay within 1% of the amount reported in 2001.

Underlying the high level stability has been a varied performance by major sector. Public works is showing greater strength than previously forecast aided by enhanced funding passed by the federal government. Institutional building continues to be strong, buoyed by school construction staying close to last year's record pace, plus a strengthening trend for healthcare facilities.*

Build Your Share of the Construction Market!

2002 U.S. Construction	Forecast Highlights (\$ in millions)	% change 2002/2001
Total Public Works	\$ 88,050	+5
Sewers and Water Supply	\$ 19,600	+12
Highways and Bridges	\$ 45,850	+6
Total Nonbuilding	\$101,750	-5
Electrical Utilities	\$ 13,700	-42
Total Institutional	\$ 94,700	+4
Educational Buildings	\$ 46,175	+4
Healthcare Facilities	\$ 16,175	+16
Other Institutional Buildings	\$ 32,350	+4
Total Commercial and Manufacturing	\$ 67,850	-13
Stores and Shopping Centers	\$ 17,700	-7
Office Buildings	\$ 21,125	-20
Hotels and Motels	\$ 4,525	-22
Other commercial buildings	\$ 17,550	-7
Manufacturing buildings	\$ 6,850	-16
Total Residential	\$229,825	+5
Single Family Housing	\$ 197,225	+6
Multifamily Housing	\$322,600	+2
Total 2002 Construction	\$494,125	—

*Source: McGraw-Hill Construction Outlook 2002 Midyear Update, Sept. 2002