



2017 Construction Outlook Survey Results Tennessee Results

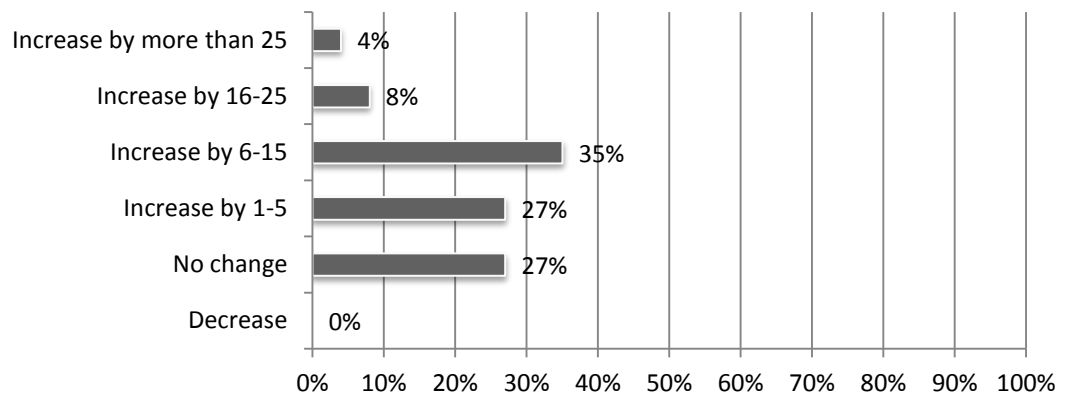
Total Responses: 32. Responses varied for some questions. Percentages are based on responses to each question and may not sum to 100 due to rounding.

1. Compared to 2016, do you expect the available dollar volume of projects you compete for in 2017 to be:

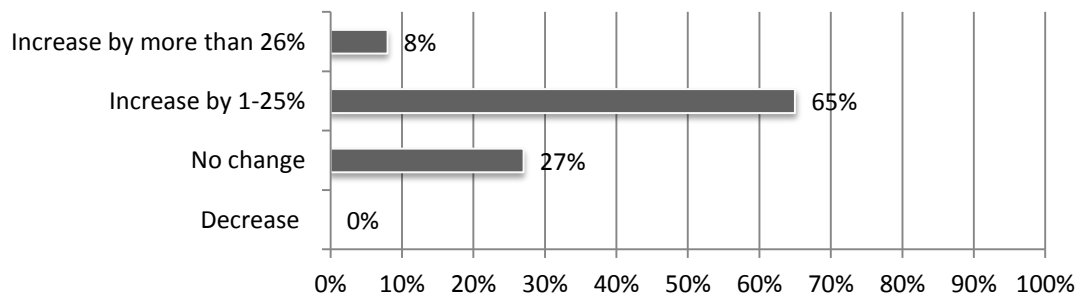
| Market | Higher | Lower | Same | Net* |
|---|--------|-------|------|------|
| All projects | 45% | 5% | 50% | 41% |
| Retail, Warehouse, Lodging | 50% | 10% | 40% | 40% |
| Manufacturing | 40% | 5% | 55% | 35% |
| Power | 42% | 8% | 50% | 33% |
| Hospital | 37% | 5% | 58% | 32% |
| Private Office | 37% | 5% | 58% | 32% |
| Multifamily Residential | 31% | 8% | 62% | 23% |
| K-12 School | 33% | 11% | 56% | 22% |
| Higher Education | 28% | 6% | 67% | 22% |
| Public Building | 32% | 1% | 58% | 21% |
| Other Transportation (e.g., transit, rail, airport) | 25% | 17% | 58% | 8% |
| Highway | 14% | 7% | 79% | 7% |
| Federal (e.g., VA, GSA, USACE, NAVFAC) | 21% | 21% | 58% | 0% |
| Water/Sewer | 15% | 15% | 69% | 0% |

*Net equals difference between number of "Higher" and "Lower" responses as percent of total.

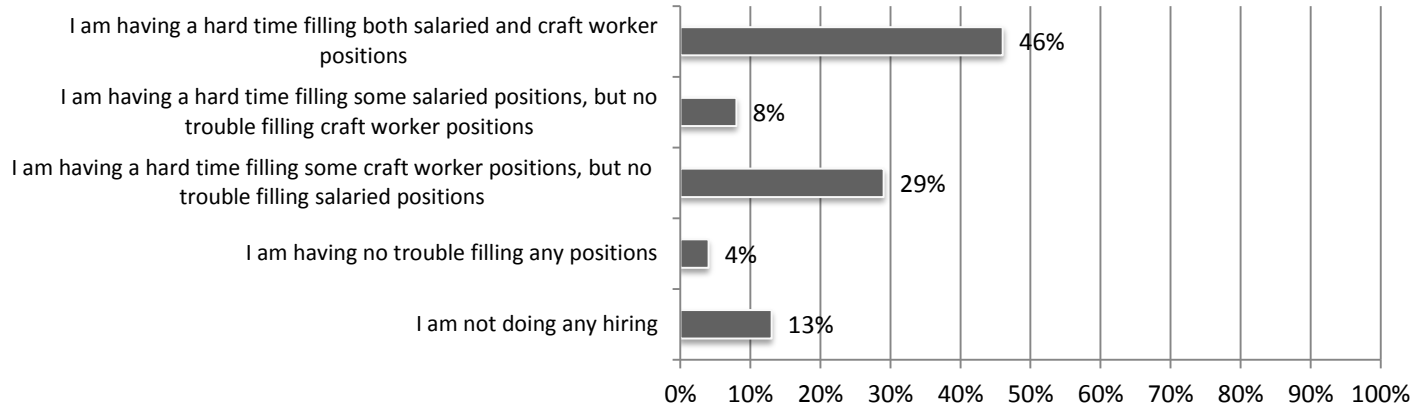
2. What numerical change do you expect in your headcount in 2017?



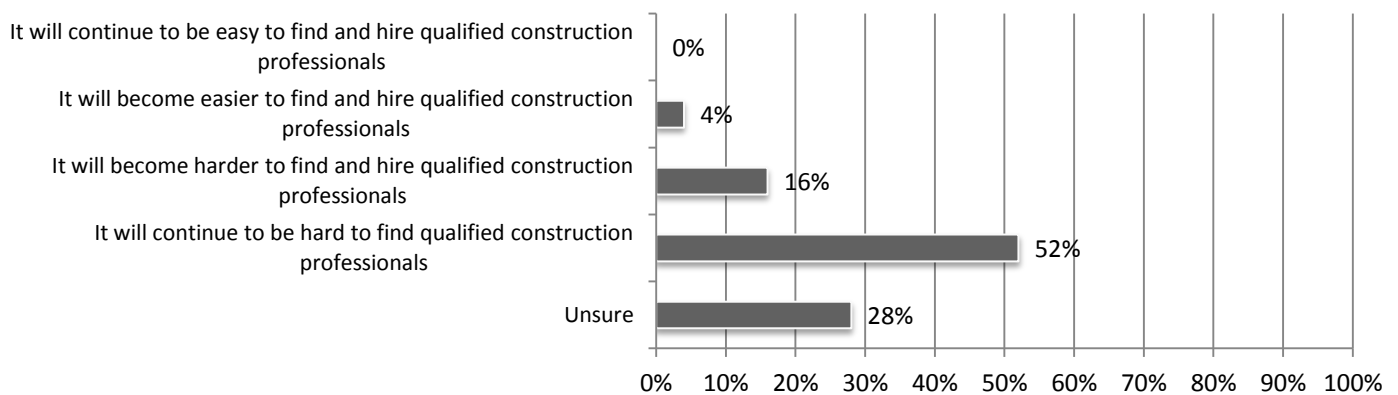
3. What percentage change do you expect in your headcount in 2017?



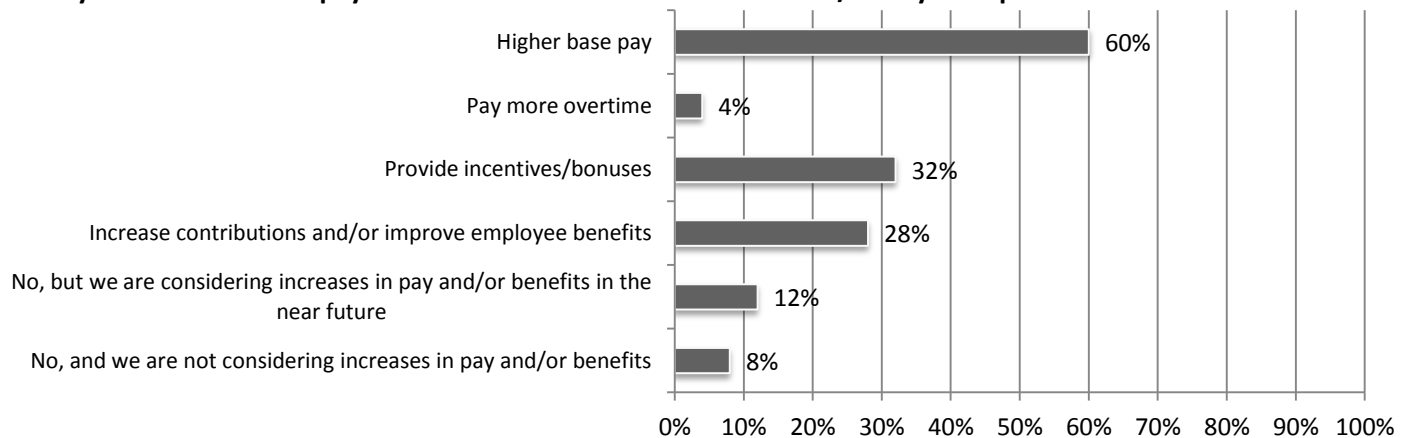
4. How would you describe your current conditions for filling key salaried positions (project manager/supervisor, estimator, etc.) and hourly craft positions (carpenter, laborer, equipment operator, etc.)?



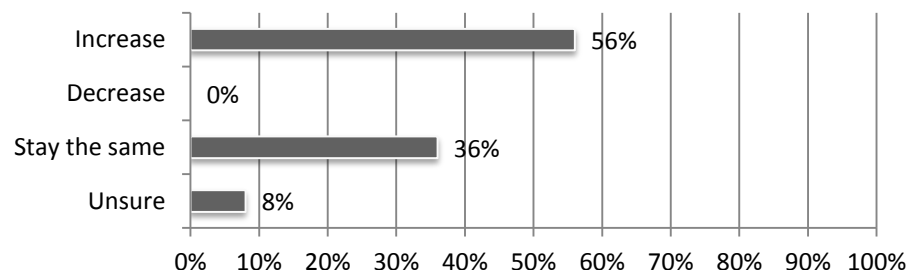
5. Do you expect any changes in the availability of salaried/hourly craft construction professionals over the coming 12 months?



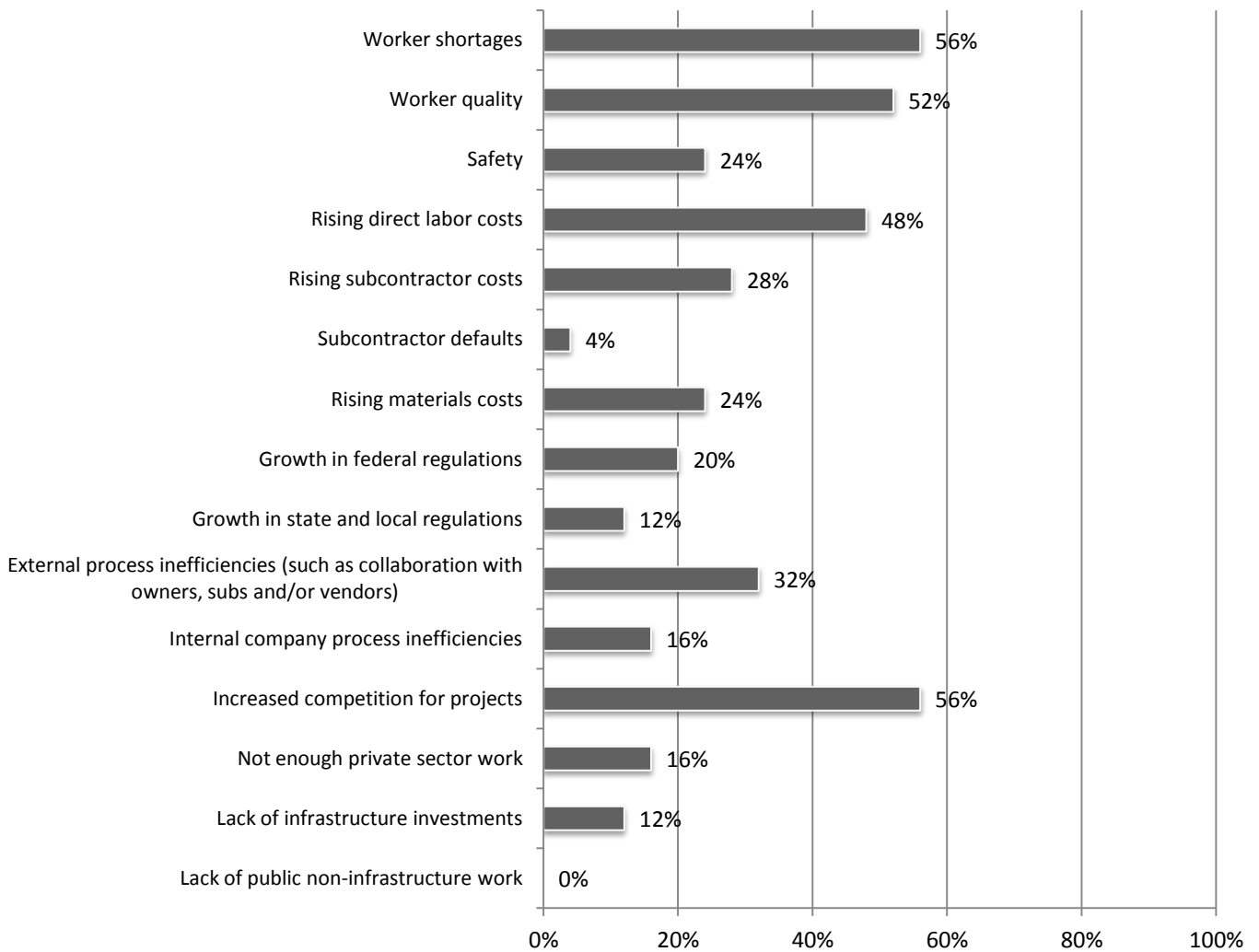
6. Has your firm increased pay or benefits to retain or recruit salaried/hourly craft professionals?



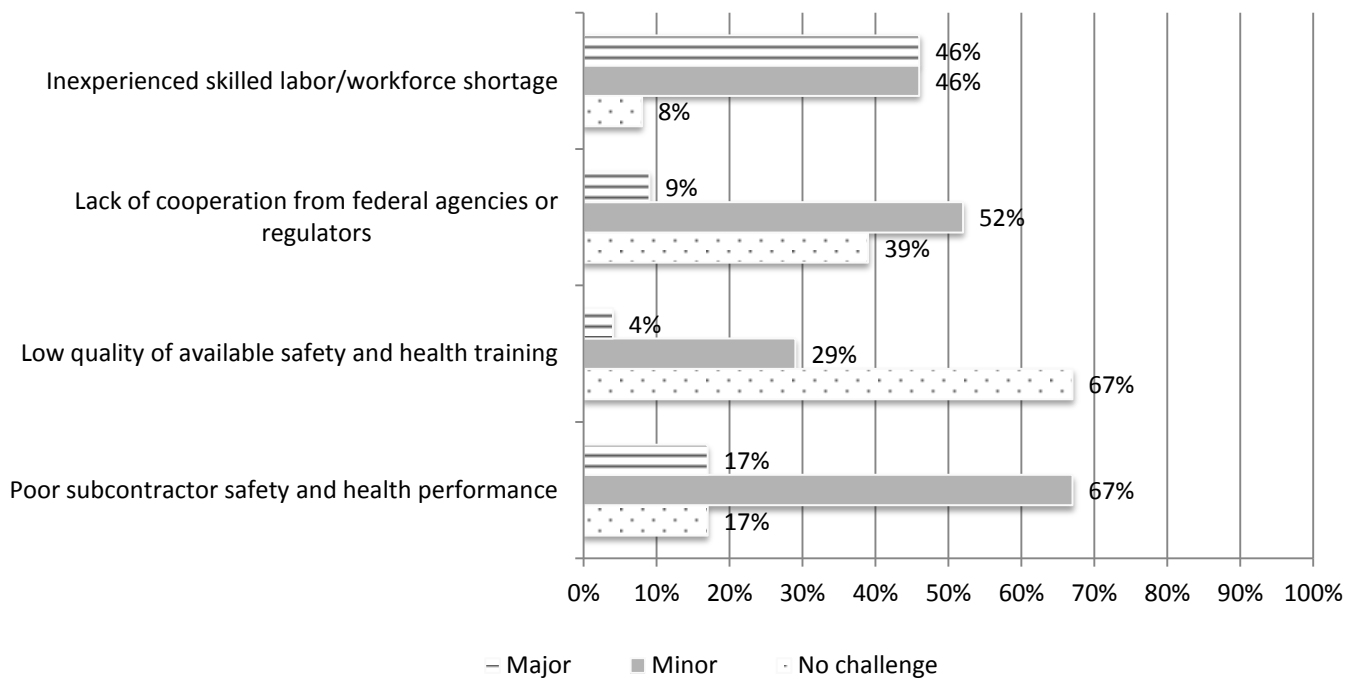
7. Compared to 2016, how will your 2017 investment in training and development change?



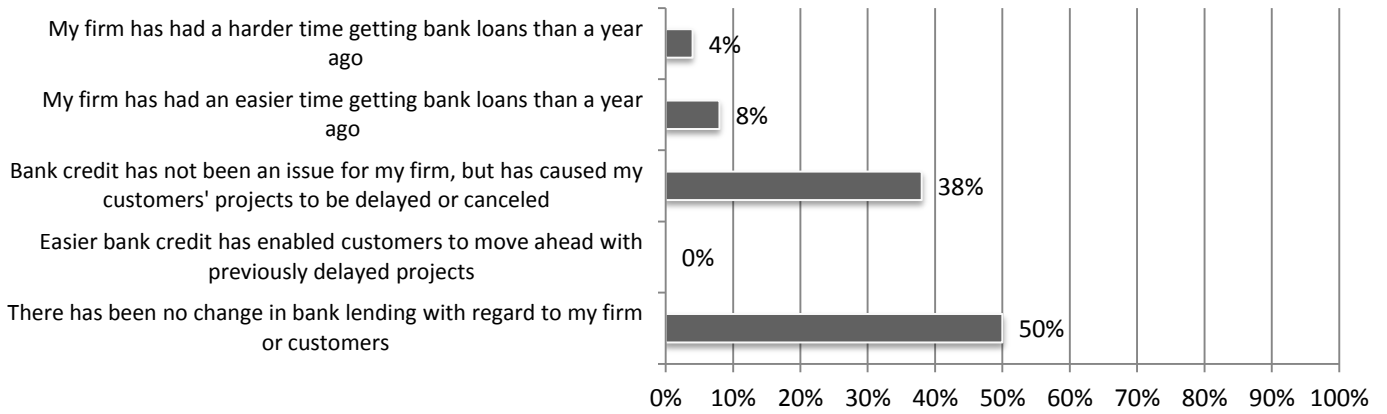
8. Which of the following issues are the biggest concerns to you and your business?



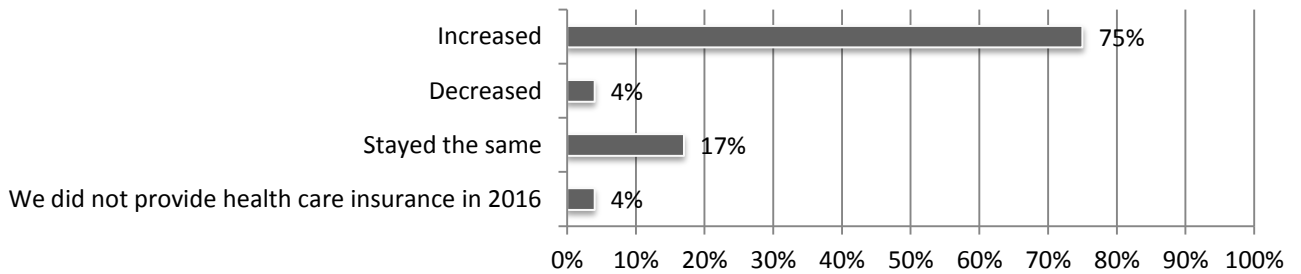
9. What challenges, if any, do you see regarding the safety and health of your workers?



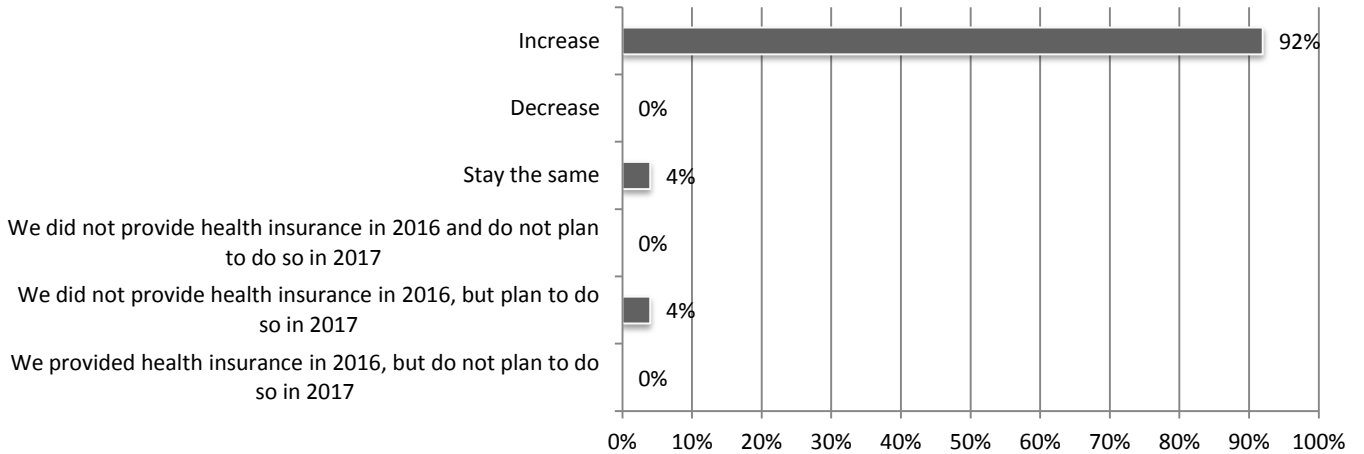
10. How would you describe credit or lending conditions for your company?



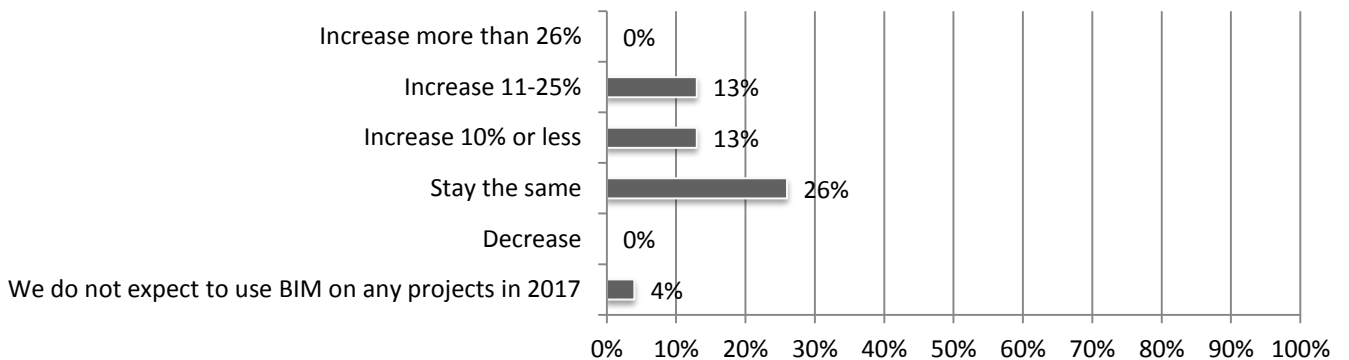
11. Did the cost of providing health care insurance for your employees increase or decrease in 2016?



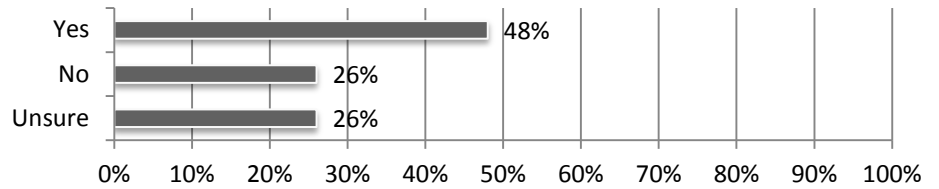
12. Do you expect the cost of providing health care insurance for your employees to increase or decrease in 2017?



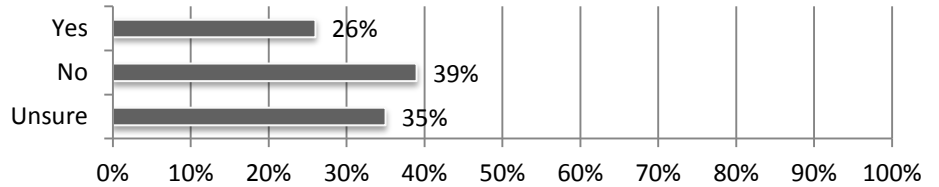
13. Do you expect the amount of projects involving Building Information Modeling (BIM) will increase, decrease or stay the same for you in 2017?



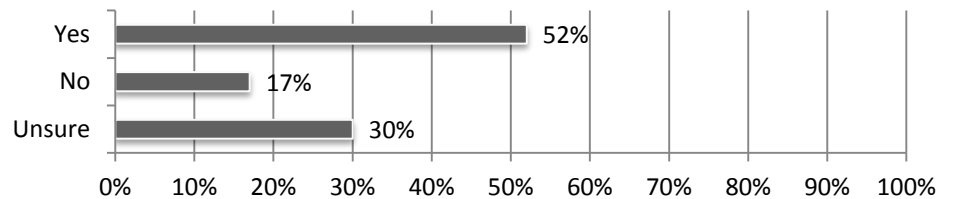
14. Do you believe that your firm utilizes lean construction principles on its projects and/or in its operation?



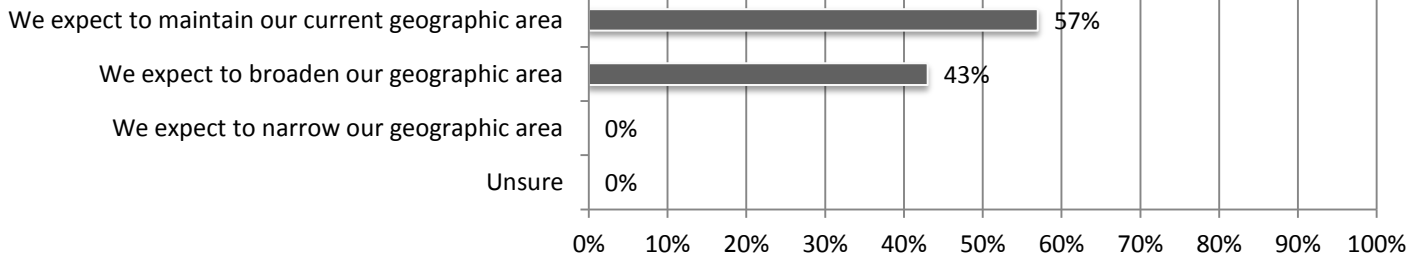
15. Do you expect your firm will work on a project using modular construction and/or off-site construction/prefabrication in 2017?



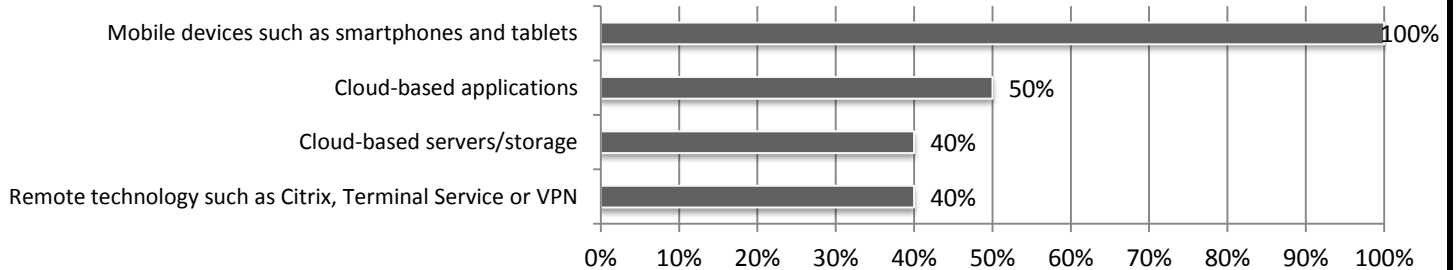
16. Does your company plan to purchase or lease new fleet vehicles this year?



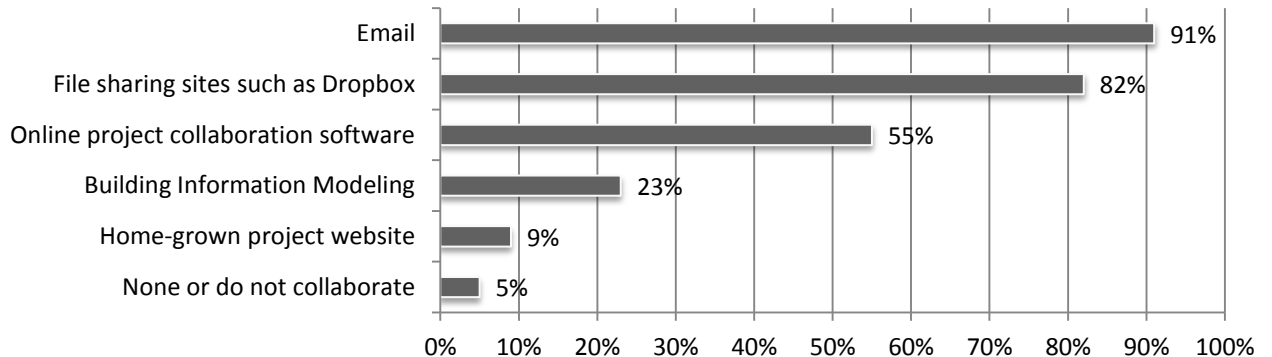
17. How do you expect your geographic market area will change in 2017?



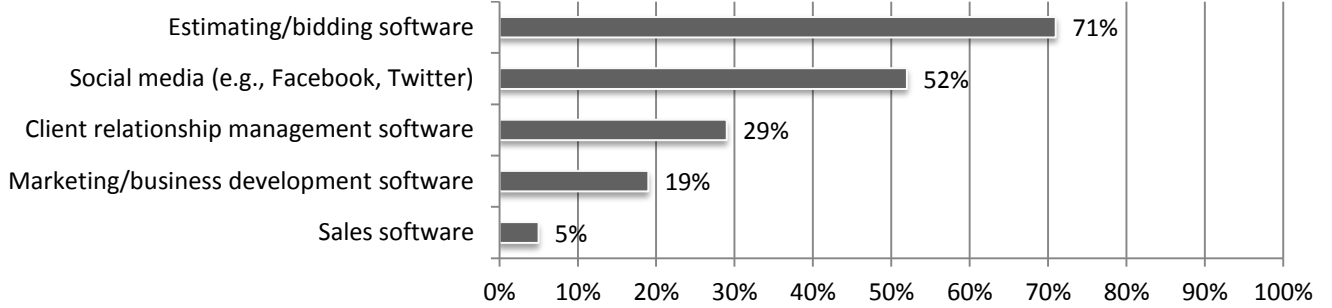
18. What technology do you use or will you implement to see or manage projects outside your traditional market area?



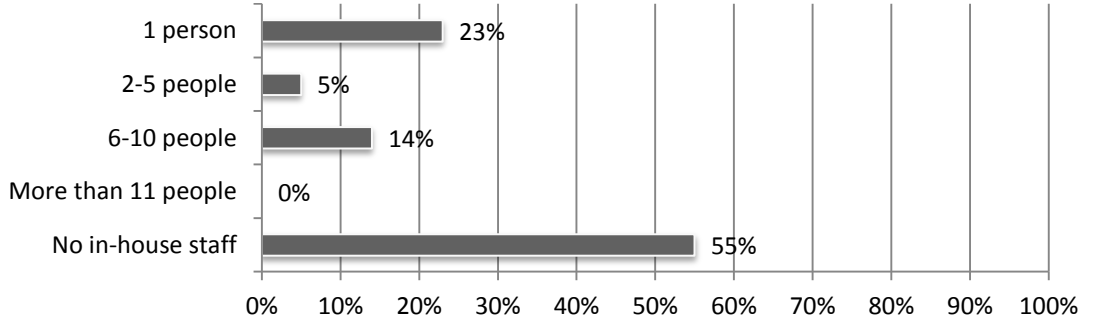
19. Do you use any of the following to collaborate with project partners?



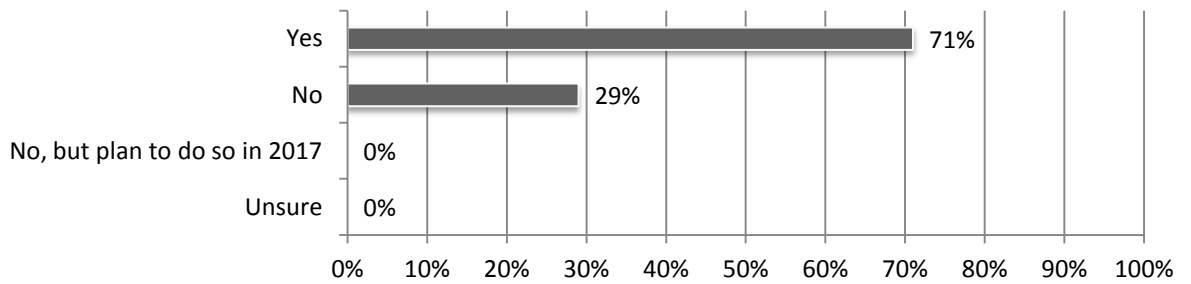
20. What information technology (IT), if any, do you use to obtain work?



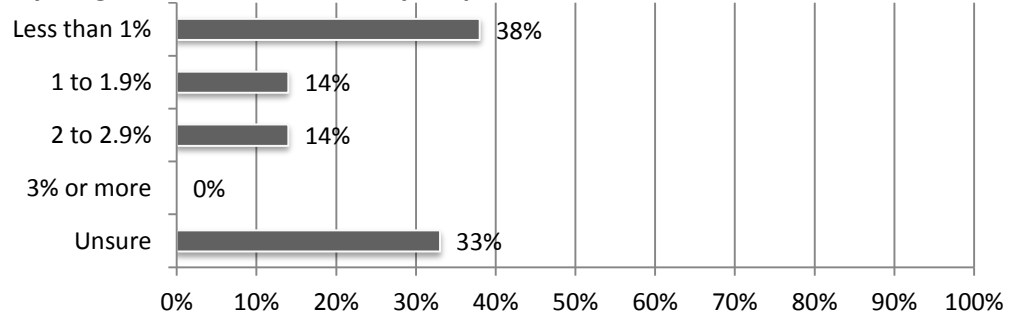
21. What is the size of your in-house IT staff?



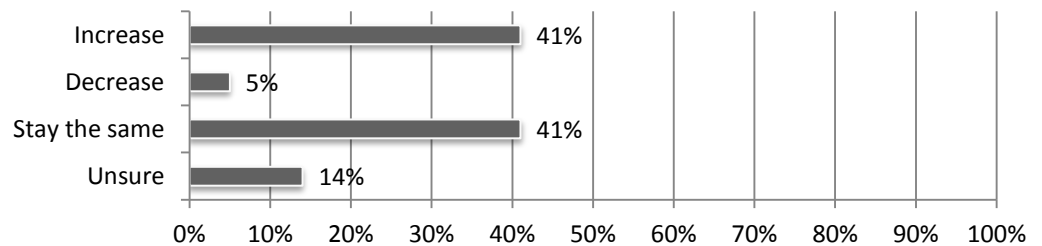
22. Do you use an outsourced service for IT?



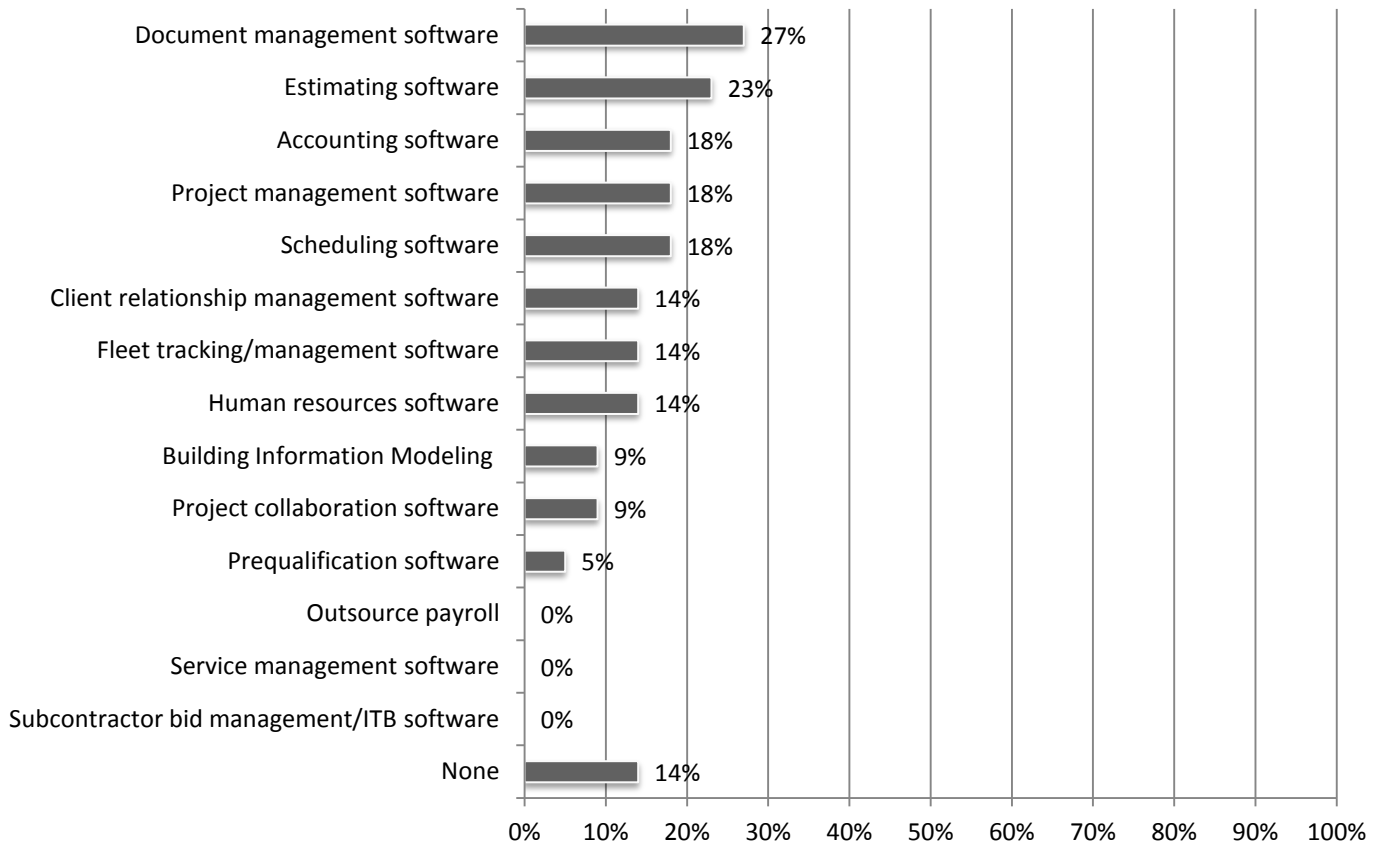
23. Approximately what percent of your gross annual revenue do you spend on IT?



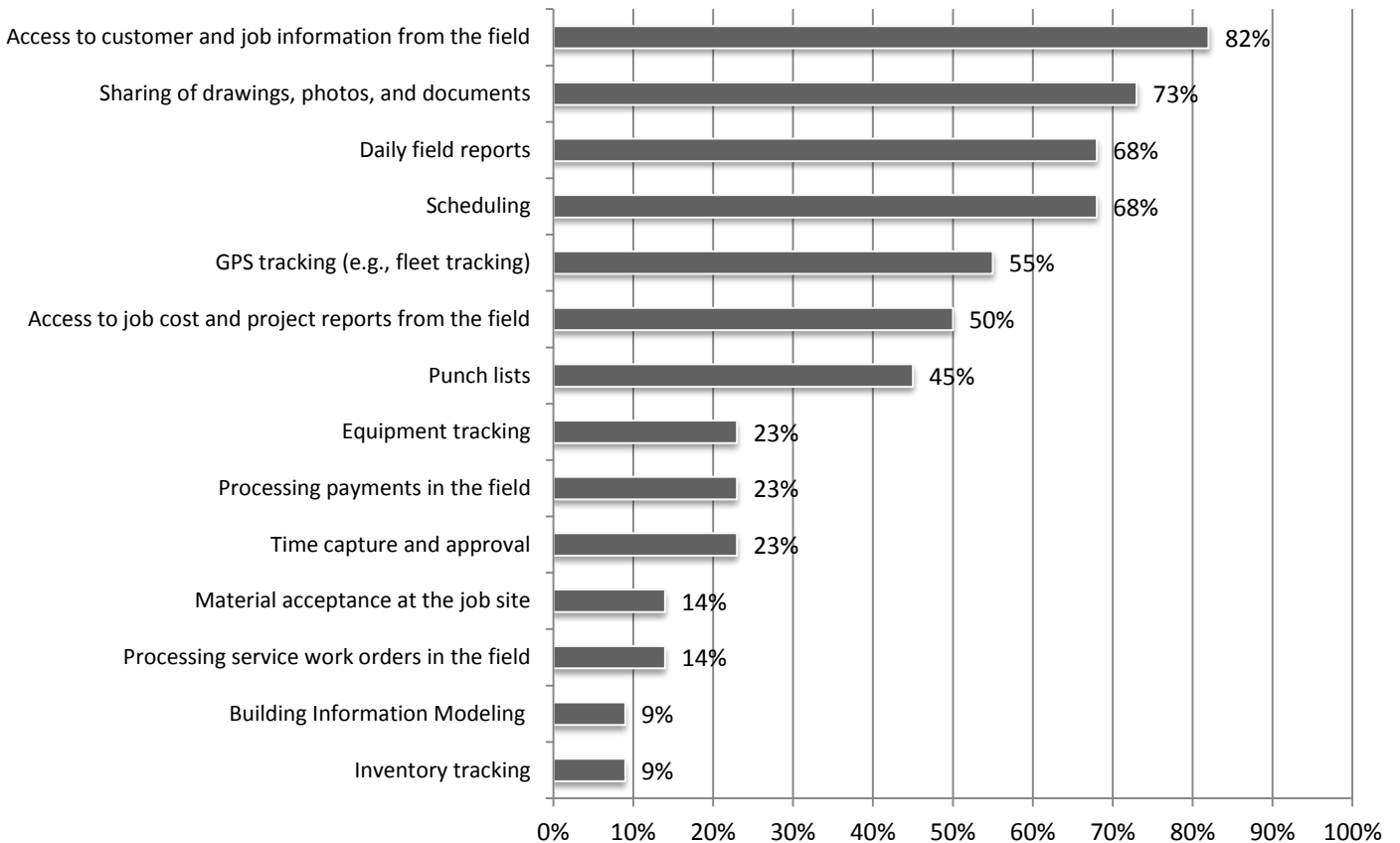
24. Compared to 2016, how will your 2017 investment in IT change?



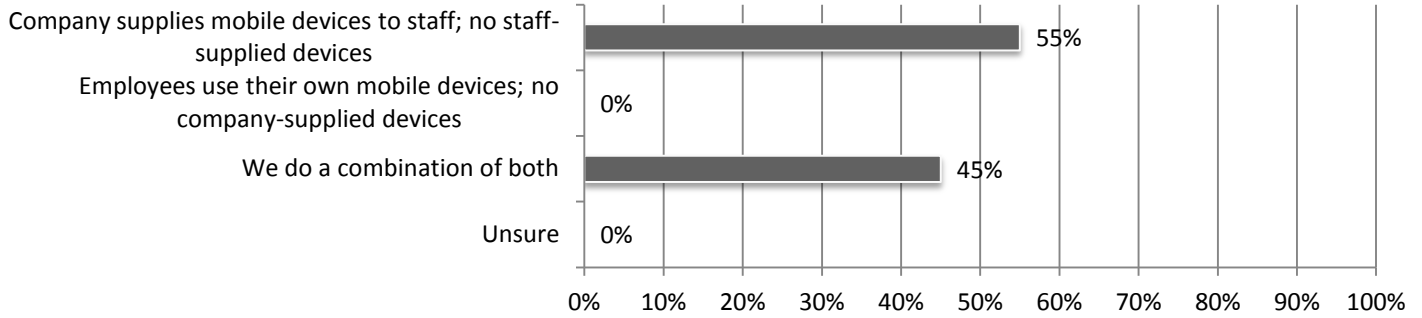
25. What software technology do you plan to invest in during 2017?



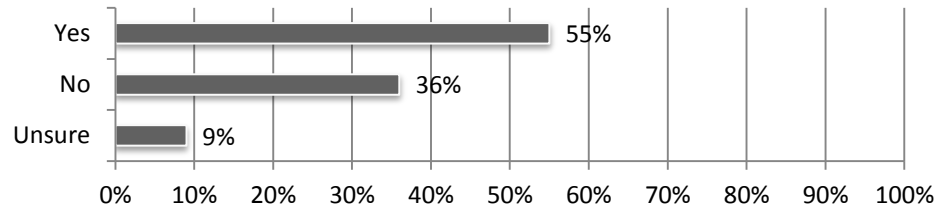
26. How does your company plan to use mobile software technology?



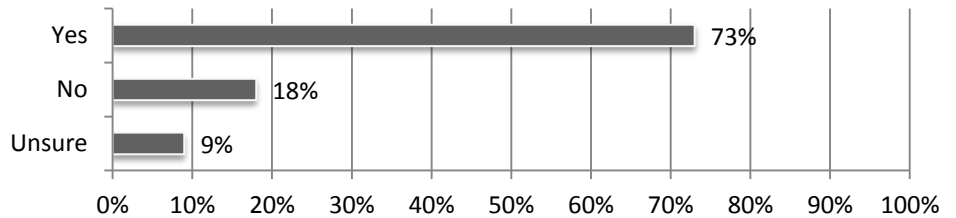
27. How do you handle the use of mobile devices (e.g., tablets, smartphones) in your company?



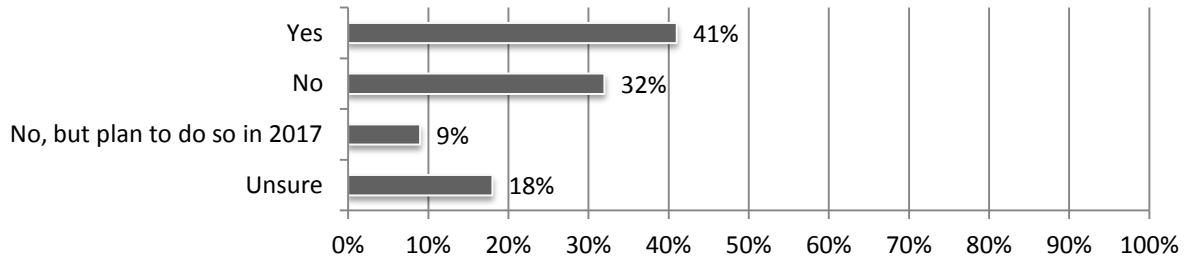
28. Do you currently have a mobile security policy in place?



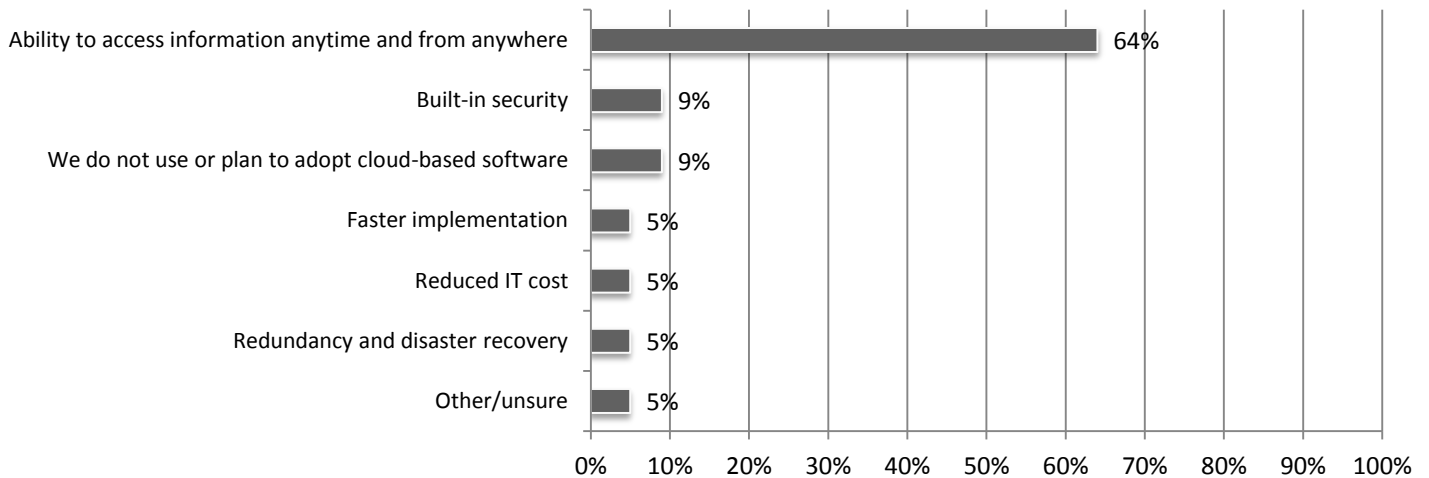
29. Do you currently have an overall IT security plan in place to protect against hacking?



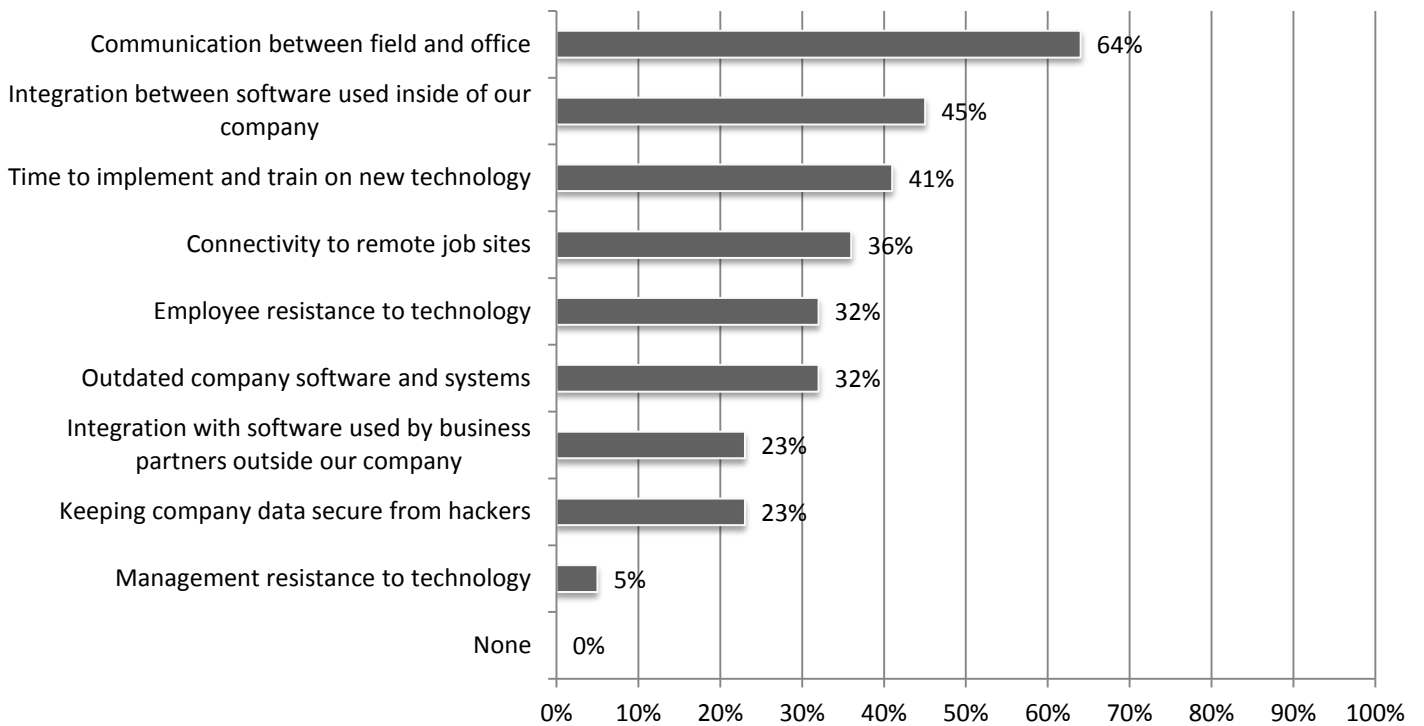
30. Do you have a formal IT plan that supports your business objectives?



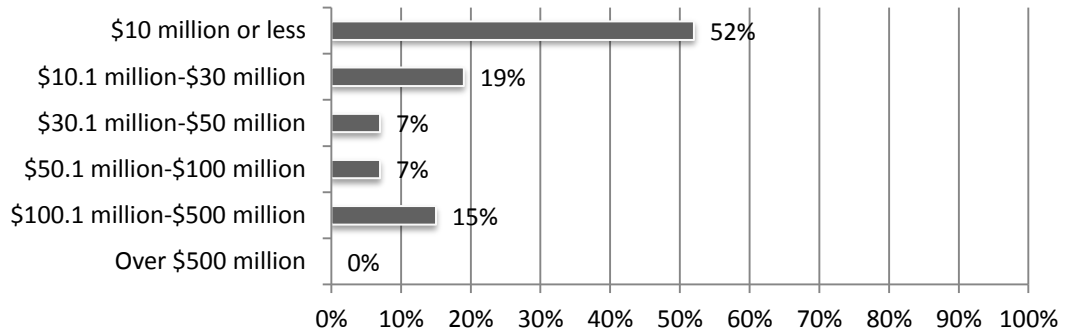
31. What is the main reason you use or plan to adopt cloud-based software?



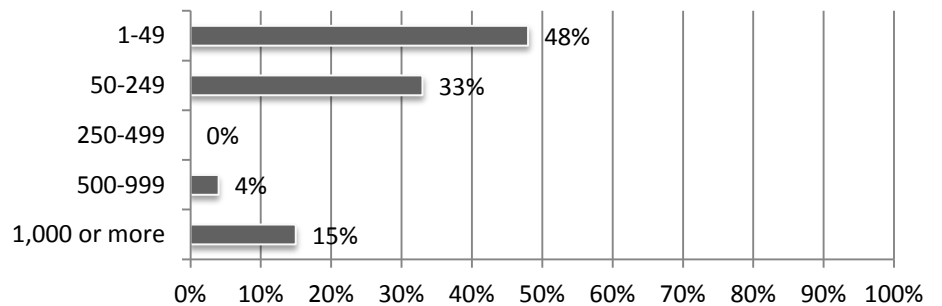
32. What are your biggest IT challenges?



33. Estimate the total dollar amount of work your firm performed in 2016.



34. How many total employees does your organization employ at all of its locations?



35. Do you employ union workers, or is your firm primarily open shop?

