AGC of America
THE ASSOCIATED GENERAL CONTRACTORS OF AMERICA
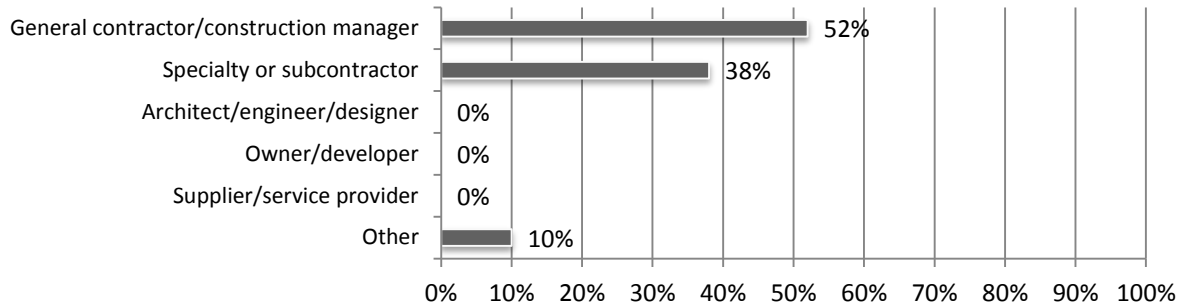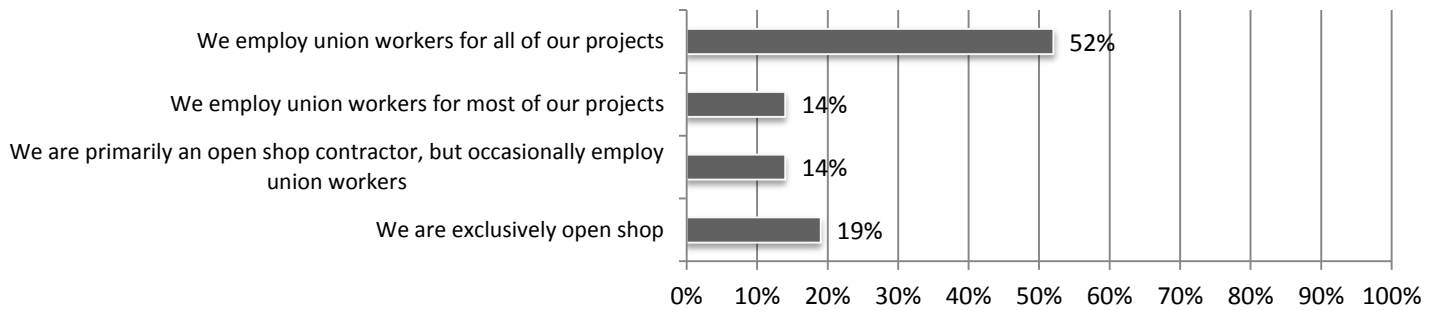Quality People. Quality Projects.

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2018 Construction Outlook Survey Results
Wisconsin Results

Total Responses: 21. Responses varied for some questions. Percentages are based on responses to each question and may not sum to 100 due to rounding.
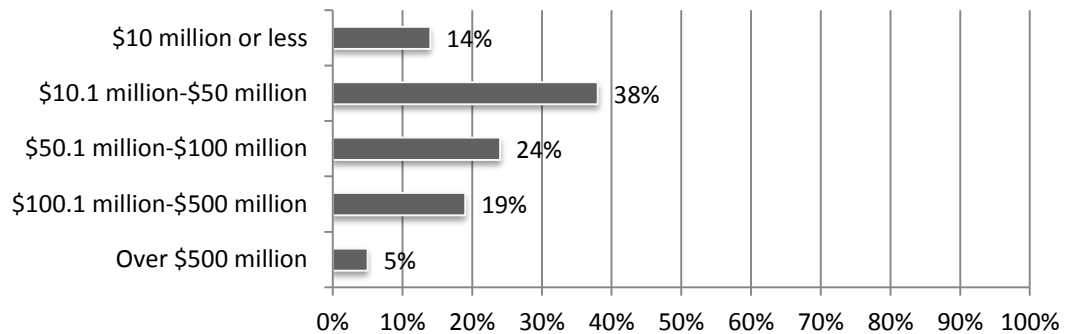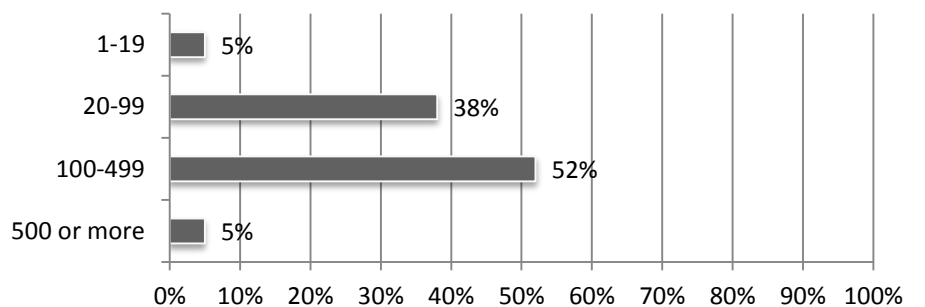
1. What best describes your firm:

General contractor/construction manager	52%
Specialty or subcontractor	38%
Architect/engineer/designer	0%
Owner/developer	0%
Supplier/service provider	0%
Other	10%

2. Does your firm employ union workers, or is your firm primarily open shop?

We employ union workers for all of our projects	52%
We employ union workers for most of our projects	14%
We are primarily an open shop contractor, but occasionally employ union workers	14%
We are exclusively open shop	19%

3. Estimate the total dollar amount of work your firm performed in 2017.

$10 million or less	14%
$10.1 million-$50 million	38%
$50.1 million-$100 million	24%
$100.1 million-$500 million	19%
Over $500 million	5%

4. How many total employees does your firm employ at all of its locations?

|	
1-19	5%
20-99	38%
100-499	52%
500 or more	5%

5. Compared to 2017, do you expect the available dollar volume of projects you compete for in 2018 to be:

Market	Higher	Lower	Same	Net*
Manufacturing	54%	8%	38%	46%
All projects	47%	13%	40%	33%
Public Building	33%	0%	67%	33%
Retail, Warehouse, Lodging	42%	17%	42%	25%
Private Office	23%	0%	77%	23%
Higher Education	20%	0%	80%	20%
Multifamily Residential	27%	9%	64%	18%
K-12 School	33%	17%	50%	17%
Federal (e.g., VA, GSA, USACE, NAVFAC)	20%	10%	70%	10%
Hospital	27%	18%	55%	9%
Highway	0%	0%	100%	0%
Power	33%	33%	33%	0%
Transportation (e.g., transit, rail, airport)	17%	17%	67%	0%
Water/Sewer	14%	14%	71%	0%

Net equals difference between number of "Higher" and "Lower" responses as percent of total.
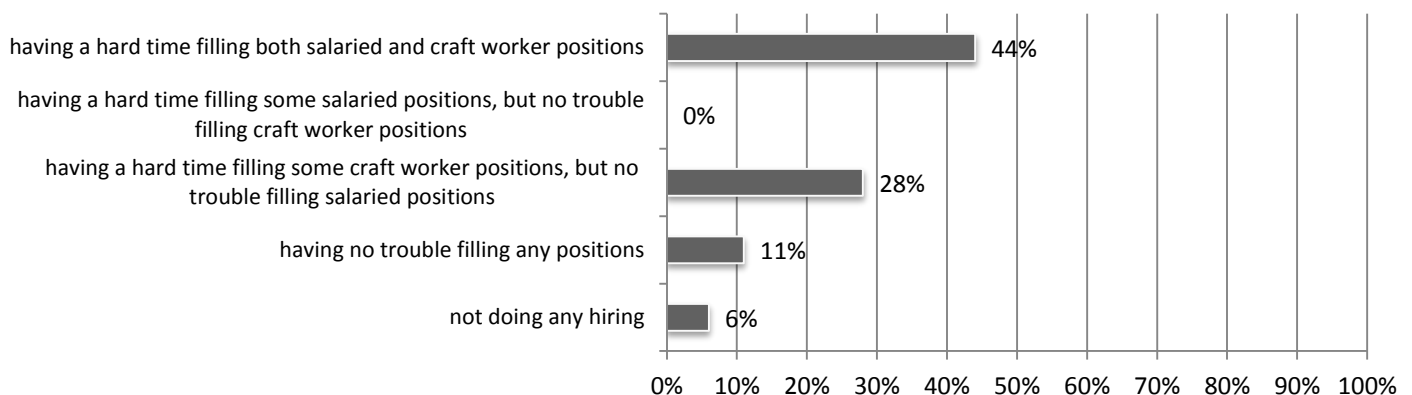
6. What numerical change do you expect in your headcount in 2018?
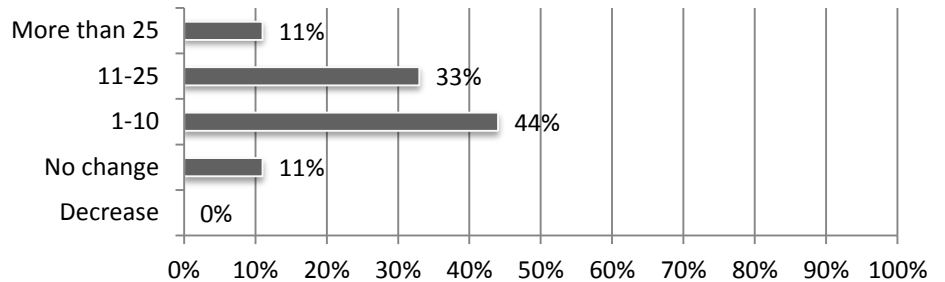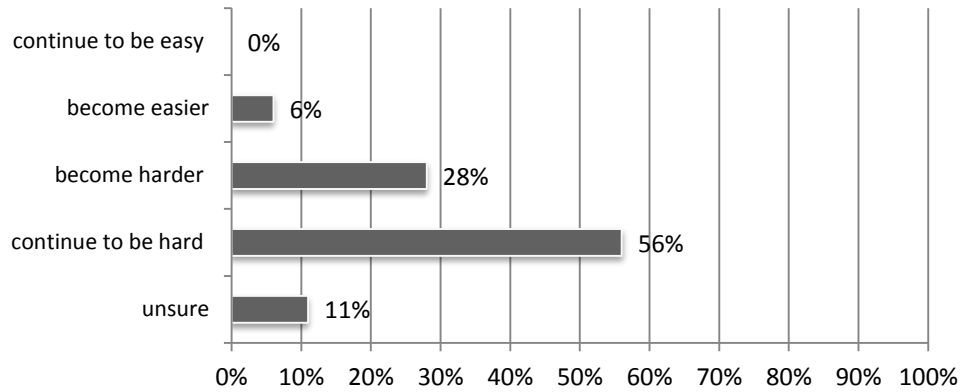

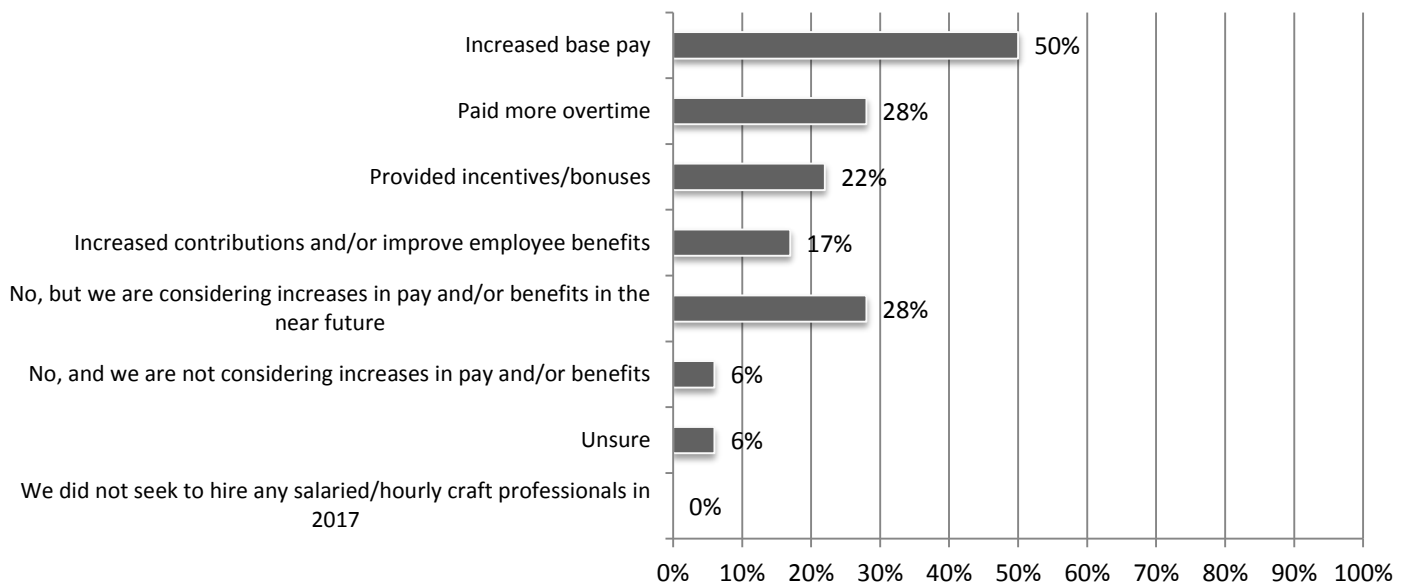**7. What percentage change do you expect in your headcount in 2018?**
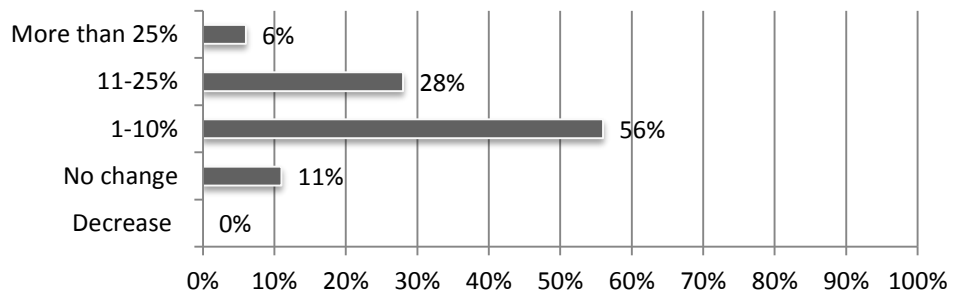
8. How would you describe your firm's current conditions for filling key salaried positions (project manager/supervisor, estimator, etc.) and hourly craft positions (carpenter, laborer, equipment operator, etc.)? My firm is:

9. Do you expect any changes in the availability of salaried/hourly craft construction professionals over the coming 12 months? Finding and hiring qualified construction professionals will:

Response	Percentage
continue to be easy	0%
become easier	6%
become harder	28%
continue to be hard	56%
unsure	11%

10. Did your firm increase pay or benefits in 2017 to retain or recruit salaried/hourly craft professionals?

Response	Percentage
Increased base pay	50%
Paid more overtime	28%
Provided incentives/bonuses	22%
Increased contributions and/or improve employee benefits	17%
No, but we are considering increases in pay and/or benefits in the near future	28%
No, and we are not considering increases in pay and/or benefits	6%
Unsure	6%
We did not seek to hire any salaried/hourly craft professionals in 2017	0%

11. Compared to 2017, how will your firm's 2018 investment in training and development change?

Response	Percentage
Increase	44%
Decrease	0%
Stay the same	56%
Unsure	0%
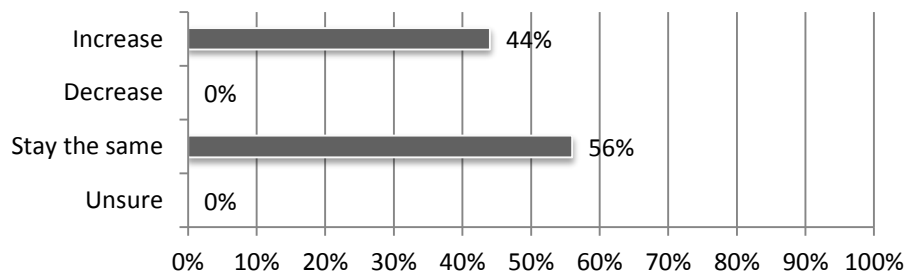
12. Which of the following issues is the biggest concern to your firm out of the following list?

Issue	Percentage
Worker shortages	40%
Growth in federal regulations	33%
Lack of infrastructure investments	33%
Growth in state and local regulations	25%
Rising subcontractor costs	25%
Safety	25%
Increased competition for projects	20%
Worker quality	20%
Rising direct labor costs (pay, benefits, employer taxes)	17%
Internal company process inefficiencies	0%
Lack of public non-infrastructure work	0%
Not enough private sector work	0%
Relations with external process inefficiencies (such as collaboration with owners, subs and/or vendors)	0%
Rising indirect labor costs (recruitment, training)	0%
Rising materials costs	0%
Subcontractor defaults	0%

13. What challenges, if any, do you see regarding the safety and health of your firm's workers?

Challenge	Major	Minor	No challenge
Inexperienced skilled labor/workforce shortage	67%	33%	0%
Lack of cooperation from federal agencies or regulators	36%	29%	36%
Low quality of available safety and health training	13%	40%	47%
Poor subcontractor safety and health performance	7%	60%	33%

= Major   ■ Minor   ∙ No challenge
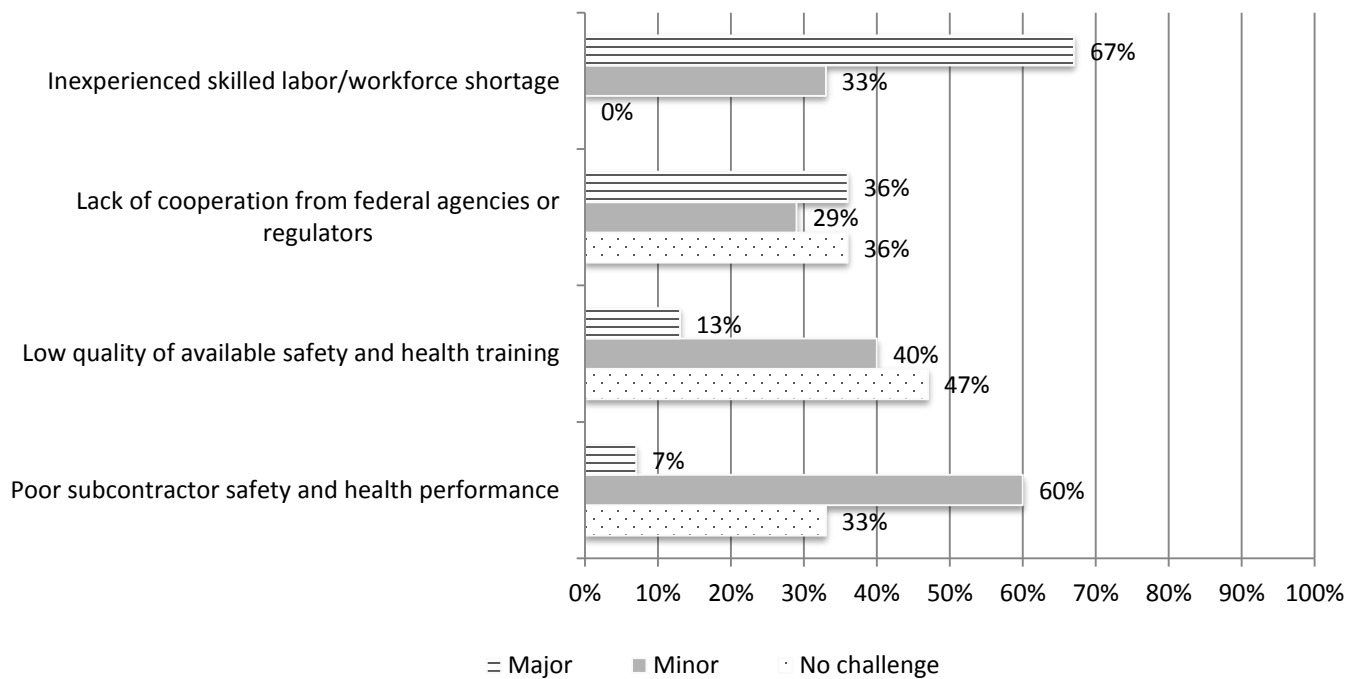
14. What change do you expect in 2018 in the number of your firm's projects that involve Building Information Modeling (BIM)?

Response	Percentage
Increase	31%
Stay the same (+/-10%)	46%
Decrease	0%
We do not expect to use BIM on any projects in 2018	23%
Unsure	0%
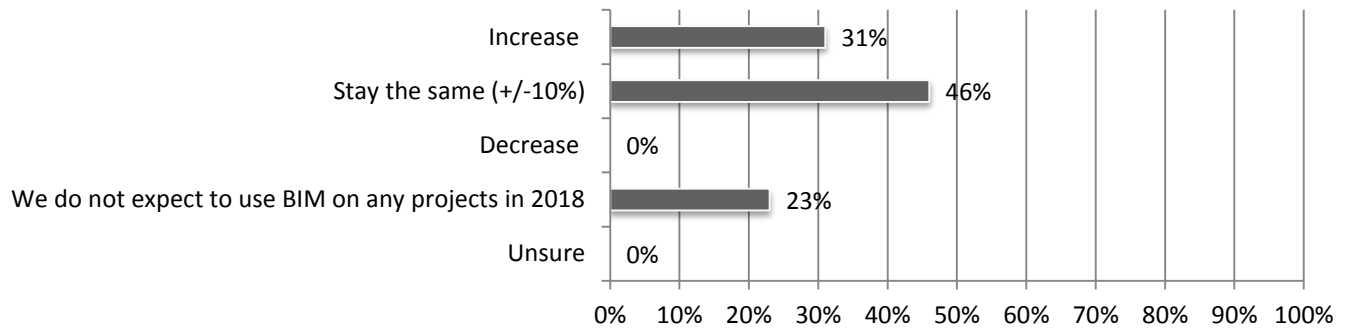
15. What is your firm using BIM for?

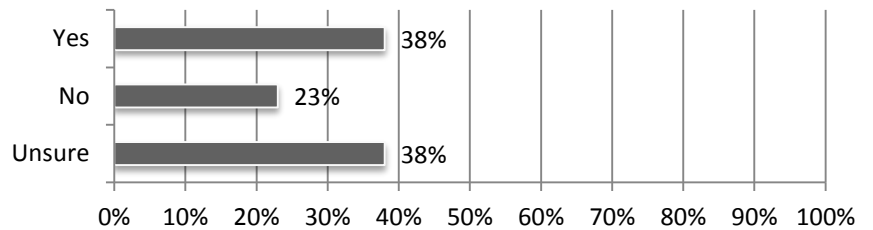| Use	Percentage
Clash detection	67%
Constructability input into the design process	56%
Design of 3D model	56%
Visually communicate project scope to clients	56%
3D model-based takeoff for cost estimating	33%
Scheduling and workforce planning	33%
Safety (identify safety issues, safety by design, safety training, etc.)	22%
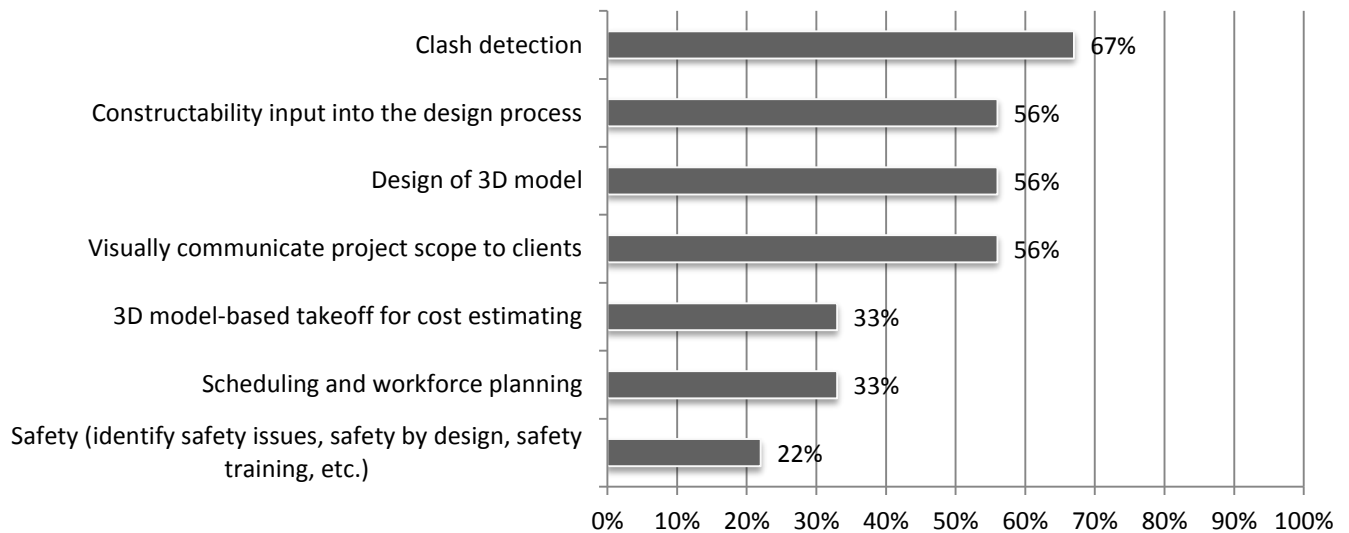
16. Does your firm utilize lean construction principles on its projects and/or in its operation?

Response	Percentage
Yes	38%
No	23%
Unsure	38%

17. Does your firm use any of the following collaborative project delivery methods?

Method	Percentage
Design-build	92%
Design-assist	62%
Public-private partnerships	46%
Integrated project delivery (IPD)	31%
None	0%
Unsure	8%
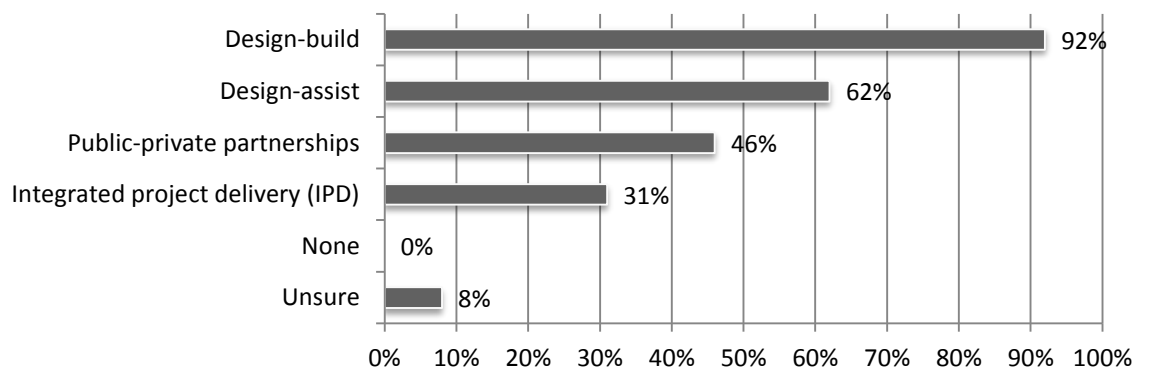
18. Does your firm use any of the following to collaborate with project partners?

Category	Percentage
File-sharing sites such as Dropbox	77%
Online project collaboration software	77%
BIM	54%
Home-grown project website	23%
None	8%
Unsure	0%
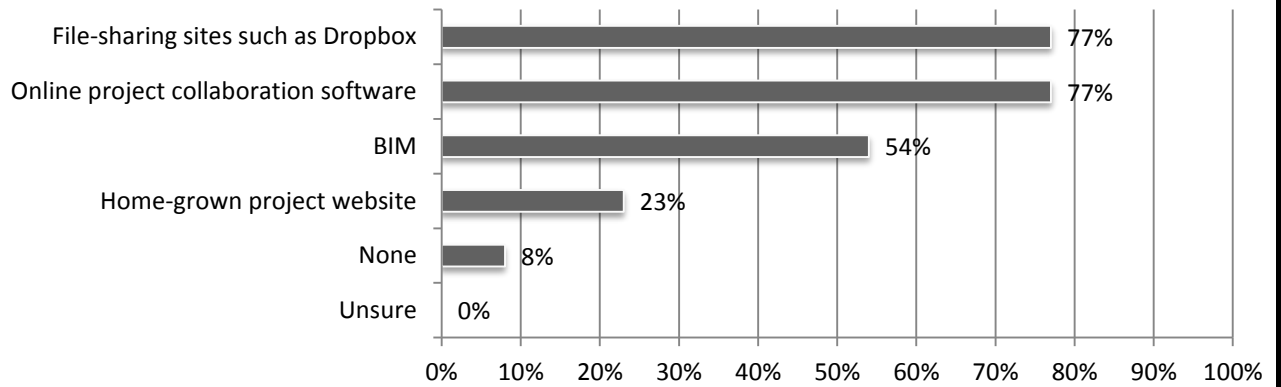
19. What business of IT functions does your firm outsource or plan to outsource to a technology provider?

Category	Currently outsource	Plan to outsource
Accounts payable automation	0%	0%
Accounts receiveable payment automation	0%	0%
Inventory	0%	0%
Lien waiver processing	0%	0%
Payroll	0%	0%
Prequalification	0%	0%
Subcontractor insurance processing	0%	0%
Backup and disaster recovery	36%	0%
Desktop (light maintenance)	45%	0%
Network management	55%	0%
Voice over IP (phone service over the internet)	18%	0%
Our firm doesn't currrently outsource or plan to outsource	9%	9%

▭ Currently outsource   ▪ Plan to outsource

20. Approximately what percent of your firm's gross annual revenue is spent on IT?

Category	Percent
Less than 1%	46%
1 to 1.9%	15%
2 to 2.9%	8%
3% or more	8%
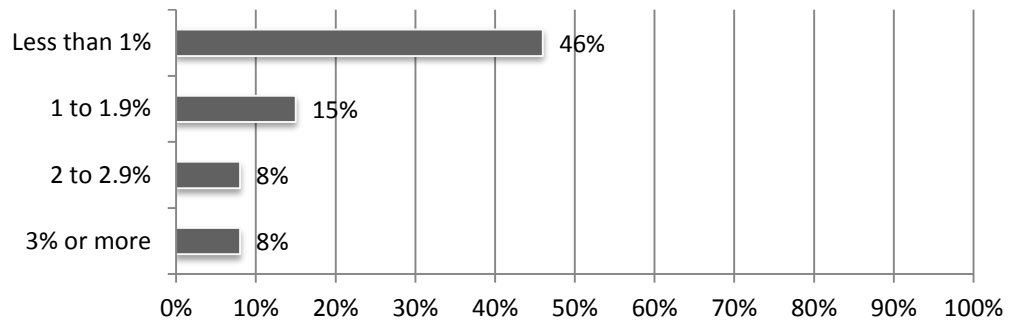
21. Compared to 2017, how will your firm's 2018 investment in IT change?

Category	Percent
Increase	77%
Decrease	0%
Stay the same	23%
Unsure	0%
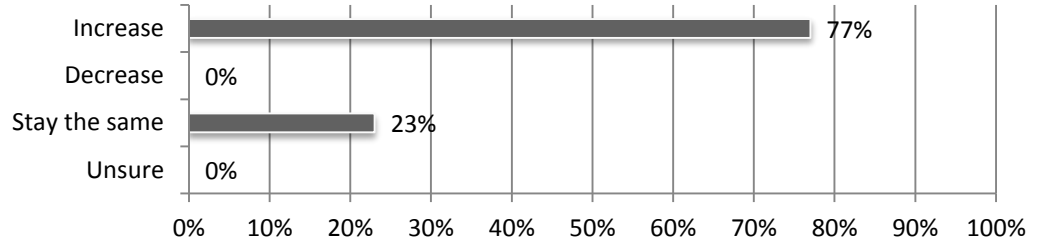
22. Compared to 2017, how will your firm's 2018 investment in the following technologies change?

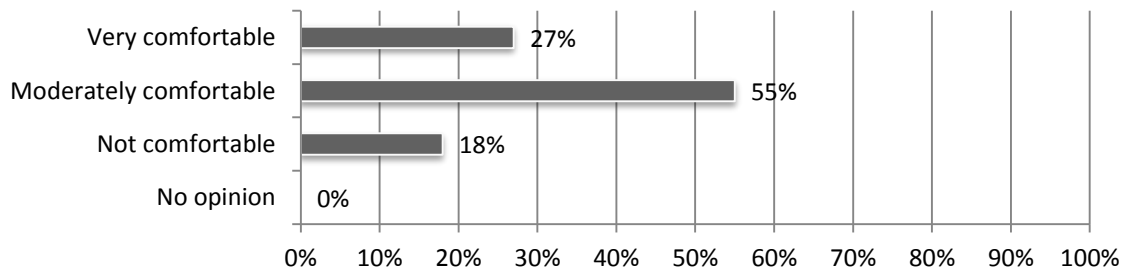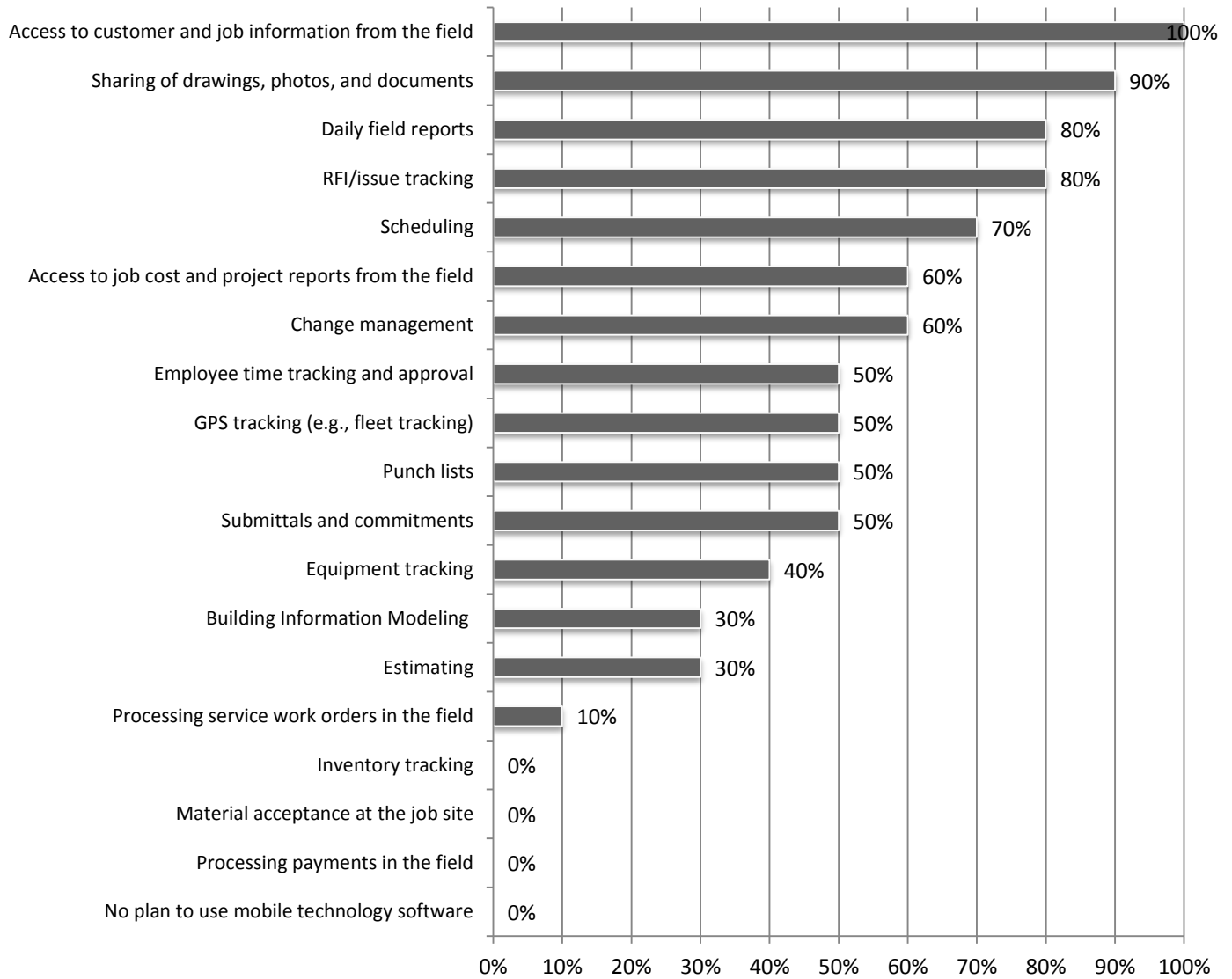| Technologies	Increase	Stay the same	Decrease	Unsure
Accounting software	30%	70%	0%	0%
Building Information Modeling	17%	67%	0%	17%
Client relationship management software	17%	50%	0%	33%
Document management software	50%	42%	0%	8%
Estimating software	42%	58%	0%	0%
Fleet tracking/management software	8%	83%	0%	8%
Human resources software	0%	91%	0%	9%
Payroll software	17%	83%	0%	0%
Prequalification software	0%	82%	0%	8%
Project collaboration software	7%	67%	0%	17%
Project management software	33%	67%	0%	0%
Scheduling software	17%	75%	0%	8%
Service management software	17%	75%	0%	8%
Subcontractor bid management/IT B software	8%	75%	0%	17%

23. How comfortable is your firm with moving its data to the cloud?

Category	Percent
Very comfortable	27%
Moderately comfortable	55%
Not comfortable	18%
No opinion	0%

24. How does your firm plan to use mobile software technology?

Category	Percentage
Access to customer and job information from the field	100%
Sharing of drawings, photos, and documents	90%
Daily field reports	80%
RFI/issue tracking	80%
Scheduling	70%
Access to job cost and project reports from the field	60%
Change management	60%
Employee time tracking and approval	50%
GPS tracking (e.g., fleet tracking)	50%
Punch lists	50%
Submittals and commitments	50%
Equipment tracking	40%
Building Information Modeling	30%
Estimating	30%
Processing service work orders in the field	10%
Inventory tracking	0%
Material acceptance at the job site	0%
Processing payments in the field	0%
No plan to use mobile technology software	0%

25. Which of the following cloud service models does your firm plan to use?

Category	Currently use	Plan to use
Cloud hosting: we outsource our servers and networking components to a cloud service provider's data center	29%	29%
Hybrid cloud: our software and data is on a private network but can be securely accessed with a web browser	43%	29%
SaaS: we use software-as-a-service (SaaS) applications that are fully cloud-based	0%	0%

= Currently use   ■ Plan to use
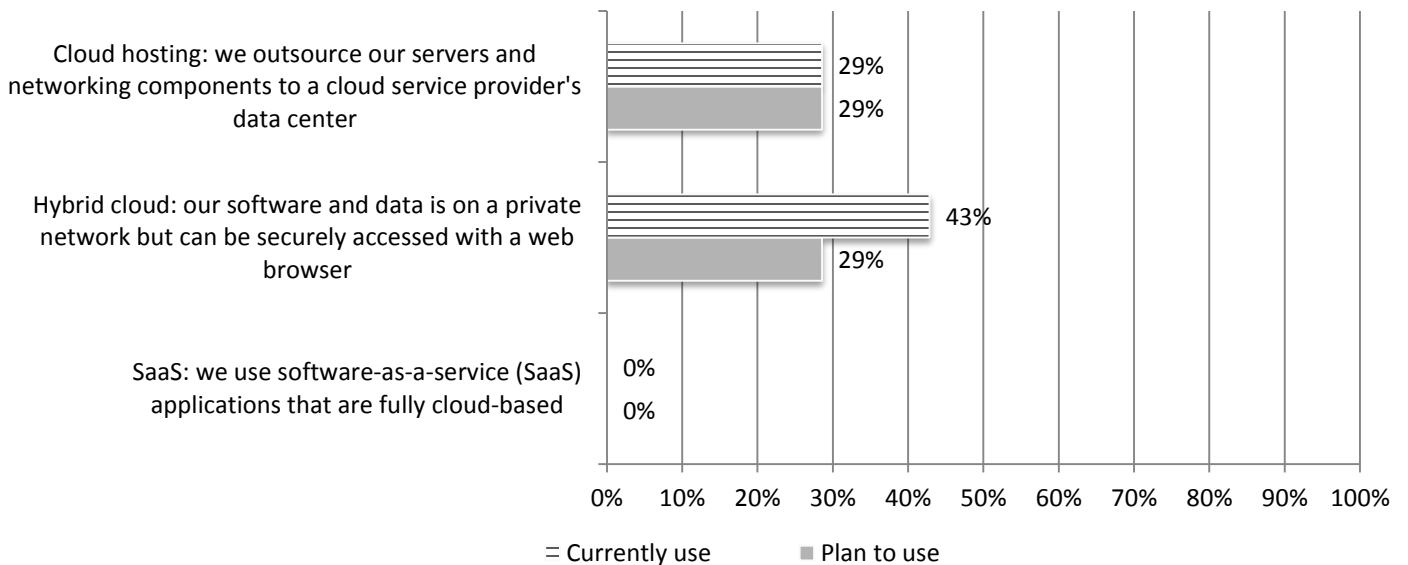
26. Does your firm currently have a mobile security plan in place?

Response	Percentage
Yes	20%
No	20%
Unsure	60%
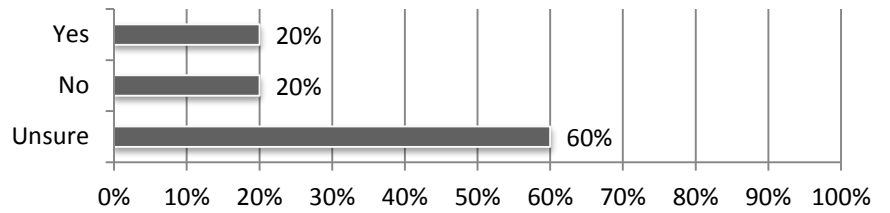
27. Does your firm currently have a formal IT plan that support your business objectives?

Response	Percentage
Yes	40%
No	20%
No, but plan to do so in 2018	30%
Unsure	10%
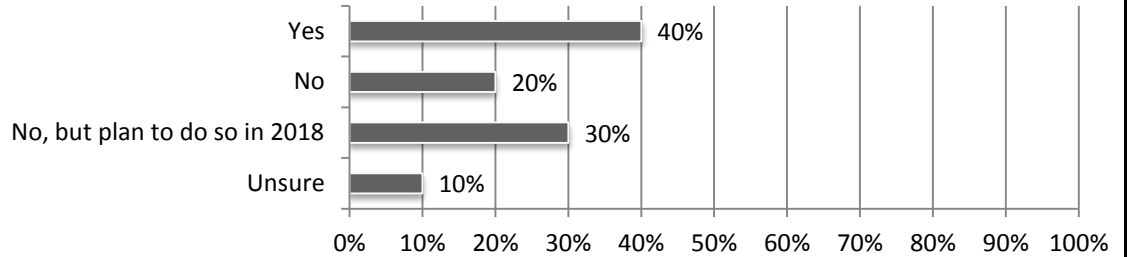
28. What are your firm's biggest IT challenges?

Challenge	Percentage
Time needed to implement and train on new technology	70%
Communication between field and office	60%
Connectivity to remote job sites	60%
Employee resistance to technology	60%
Keeping software current	50%
Keeping company data secure from hackers	40%
Keeping hardware current	40%
Outdated company software and systems	30%
Integration between software used inside of our company	20%
Integration with software used by project partners outside our company	20%
Management resistance to technology	10%
None	0%