2020 Construction Outlook Survey Results
Western Region

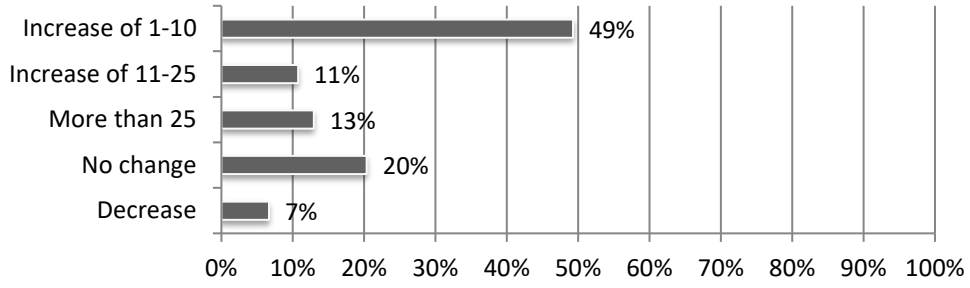
Total Responses: 272 (out of 956). Responses varied for some questions. Percentages are based on responses to each question and may not sum to 100 due to rounding.

1. Compared to 2019, do you expect the available dollar value of projects you compete for in 2020 to be (answer for all market areas in which your business operates):

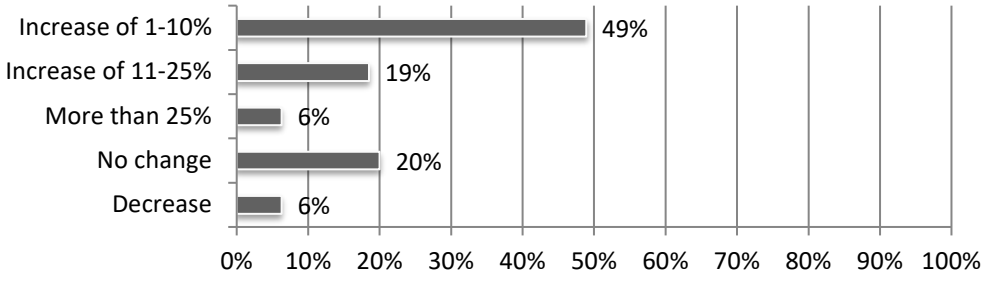
Markets	Higher	Lower	Same	Net*	National Net*
K-12 School	41%	15%	44%	26%	20%
Water/Sewer	34%	12%	54%	22%	25%
Bridge/Highway	33%	15%	52%	19%	20%
Transportation (e.g., transit, rail, airport)	32%	13%	55%	19%	20%
Higher Education	33%	14%	53%	18%	16%
Multifamily Residential	33%	19%	48%	15%	11%
Public Building	29%	15%	56%	14%	10%
Retail, Warehouse, Lodging	28%	14%	57%	14%	10%
Hospital	26%	17%	57%	8%	20%
Federal (e.g., VA, GSA, USACE, NAVFAC)	24%	16%	61%	8%	17%
Power	21%	13%	66%	8%	17%
Manufacturing	22%	15%	64%	7%	11%
Private Office	25%	21%	54%	5%	8%
Other	26%	7%	67%	19%	17%

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

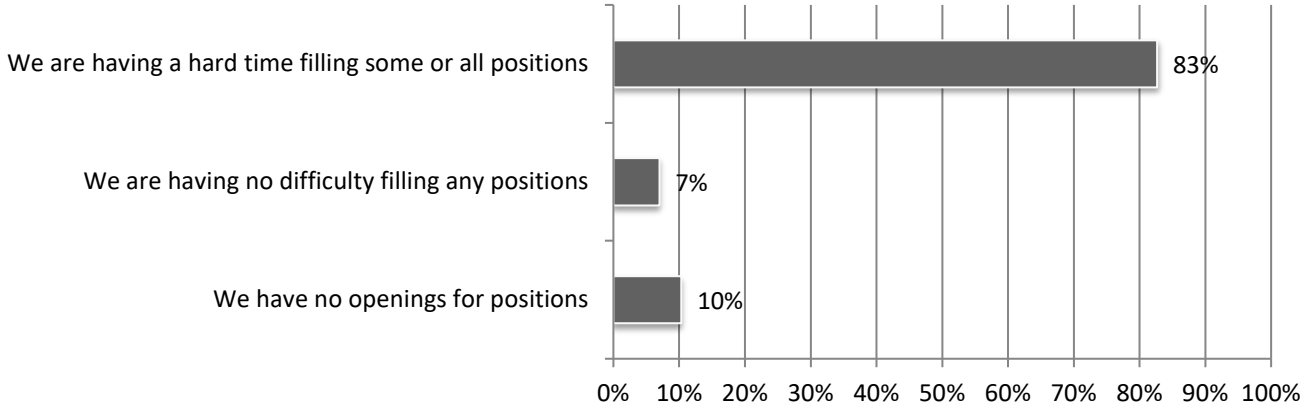
2. What <u>numerical</u> change do you expect in your headcount in 2020?



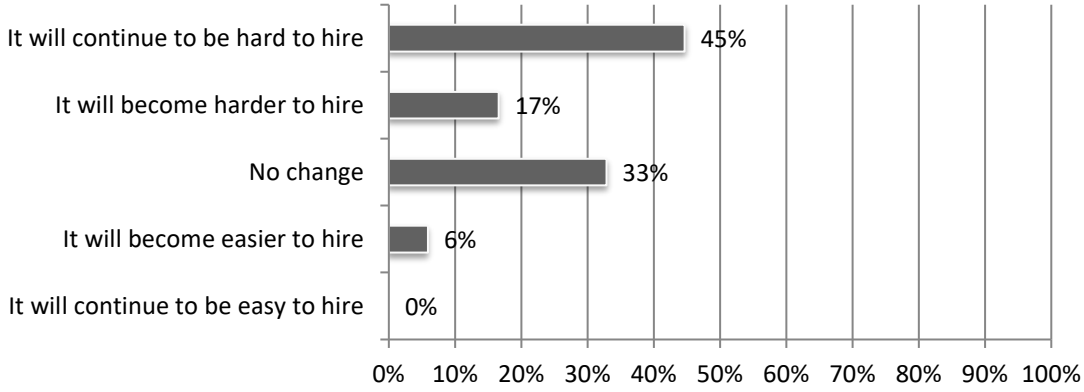
3. What <u>percentage</u> change do you expect in your headcount in 2020?



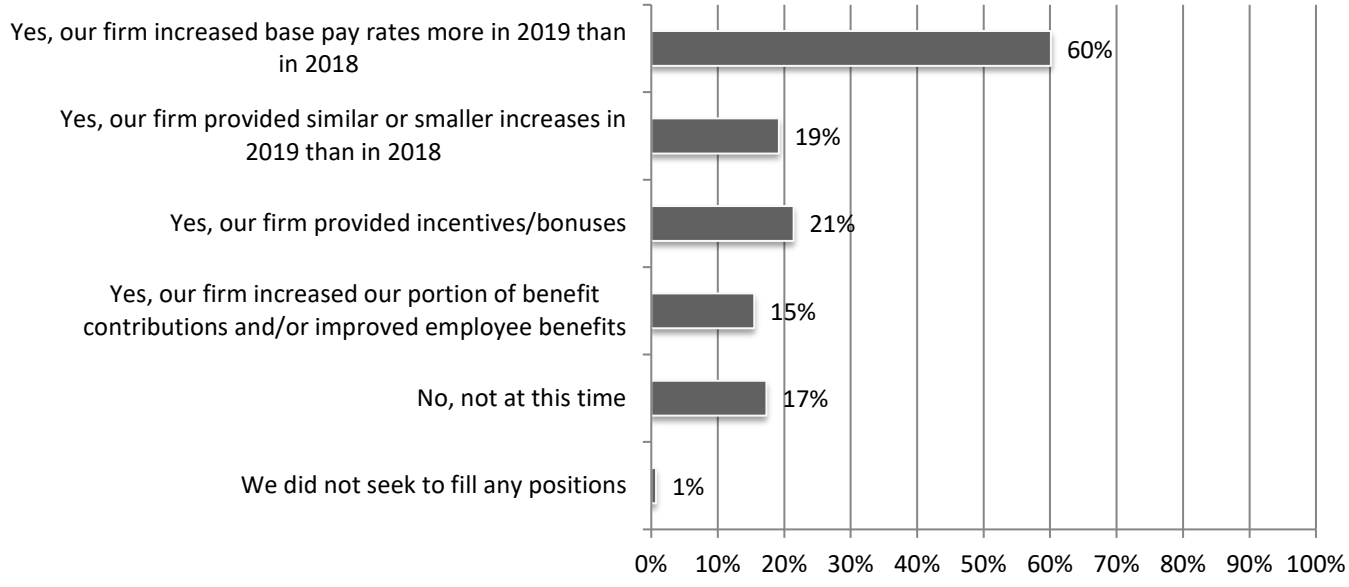
4. How would you describe your current situation in filling salaried and hourly craft positions?



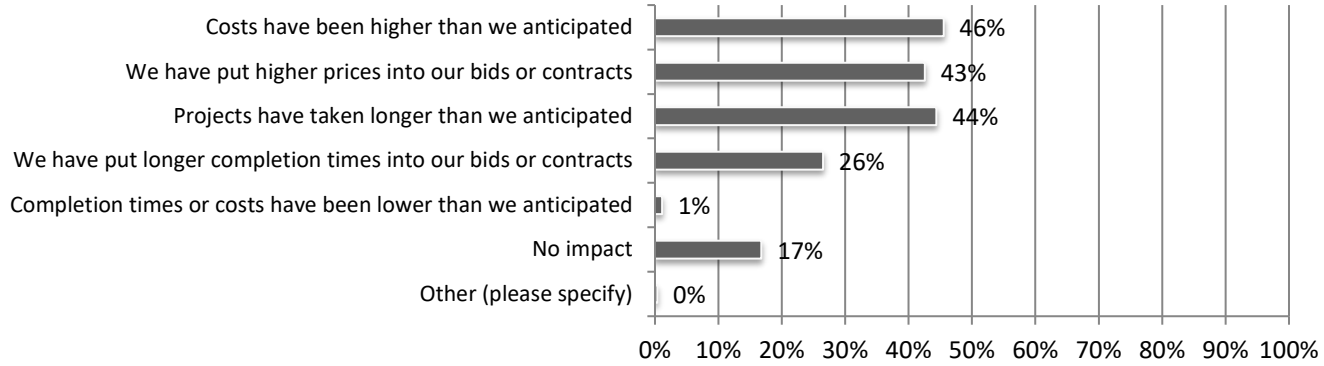
5. Do you expect any changes in the availability of hourly craft or salaried personnel over the coming 12 months?



6. Did your firm increase pay or benefits for salaried or hourly craft personnel in 2019 because of difficulty filling positions? (mark all that apply)

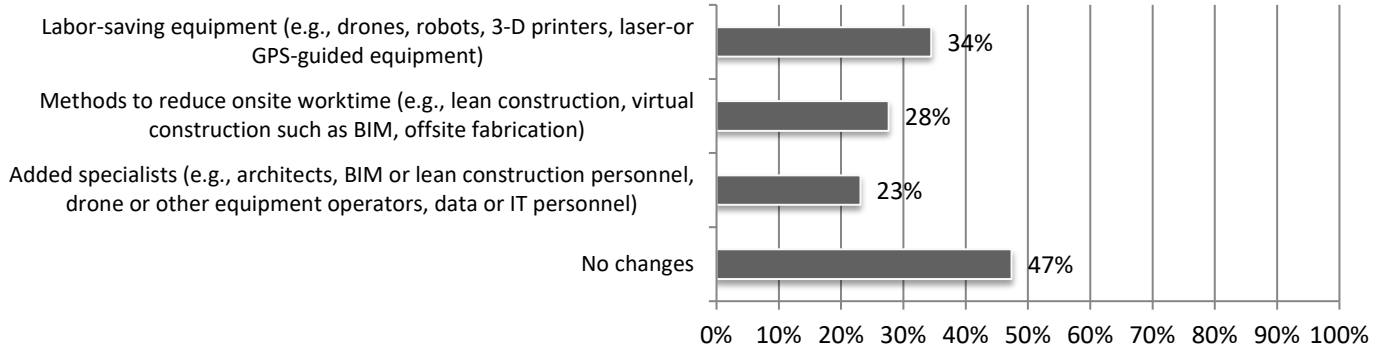


7. If your firm is experiencing staffing challenges, how would you describe the impact on your projects? (mark all that apply)

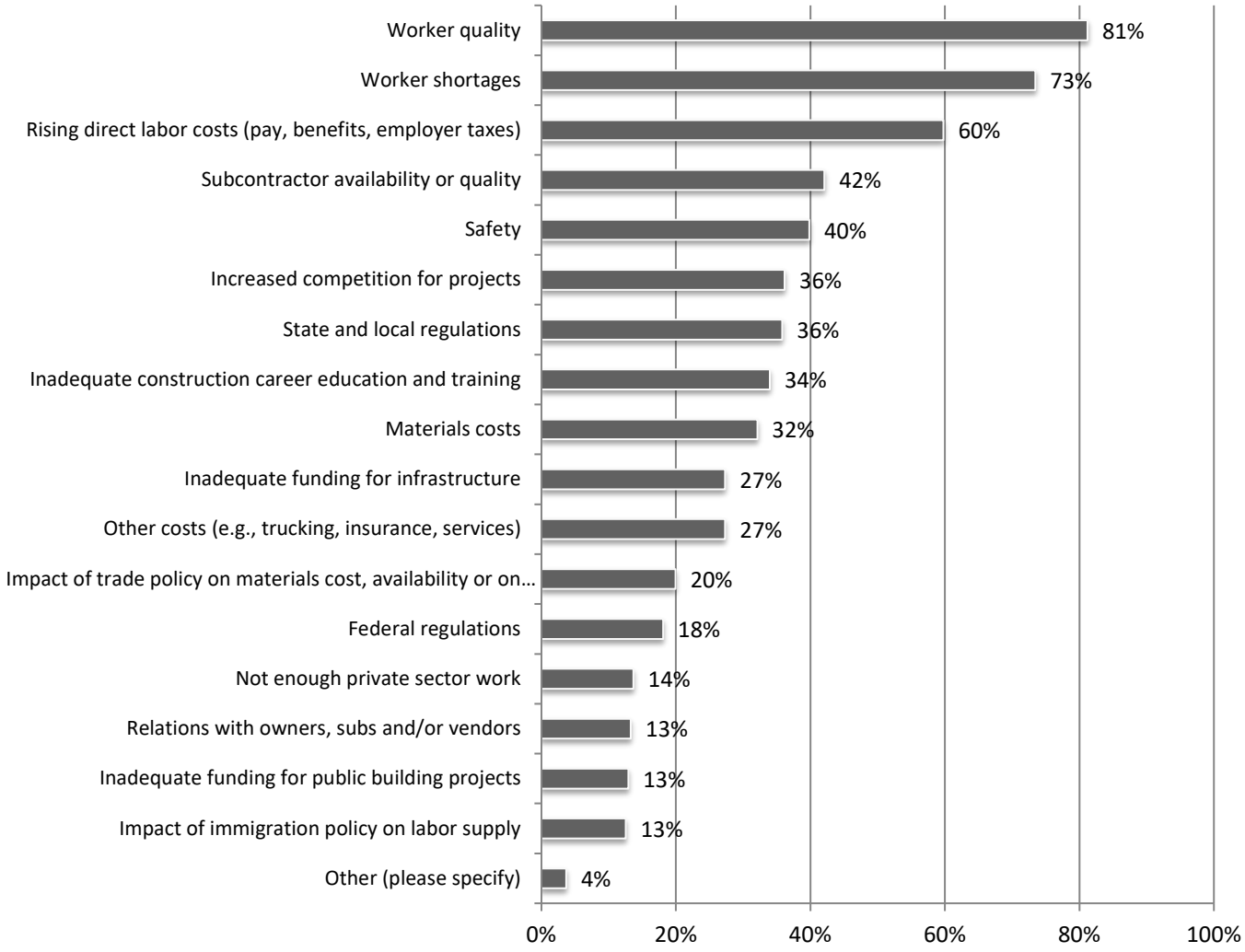


8. In the last year, what has your firm done to invest in the training and development of skilled labor/qualified workers?

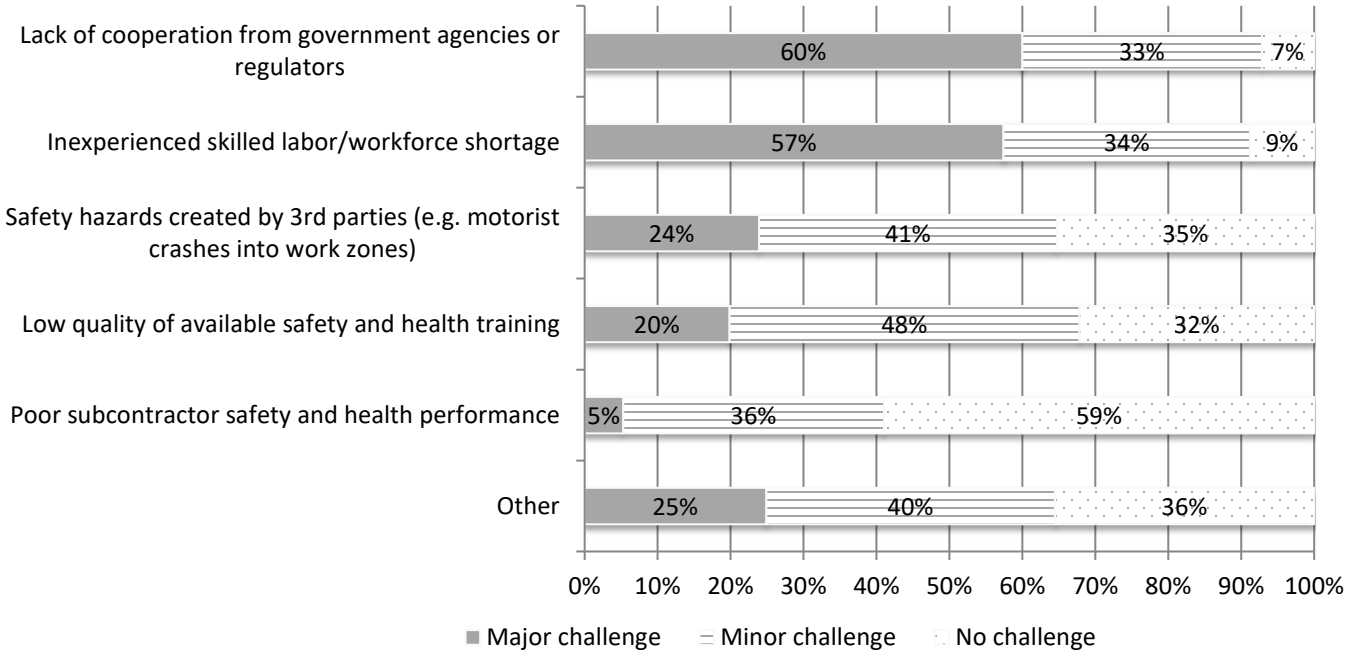
9. Has your firm adopted or increased use of the following to replace workers or skills? (mark all that apply)



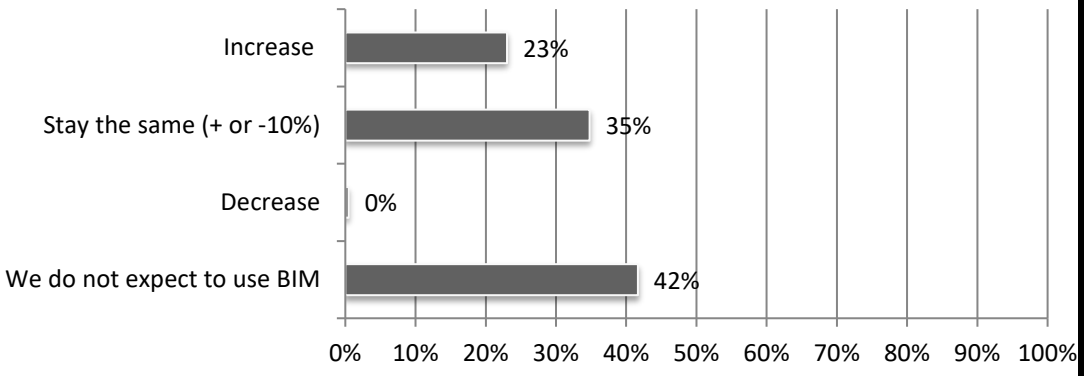
10. What are your biggest concerns for 2020 (mark all that apply)?



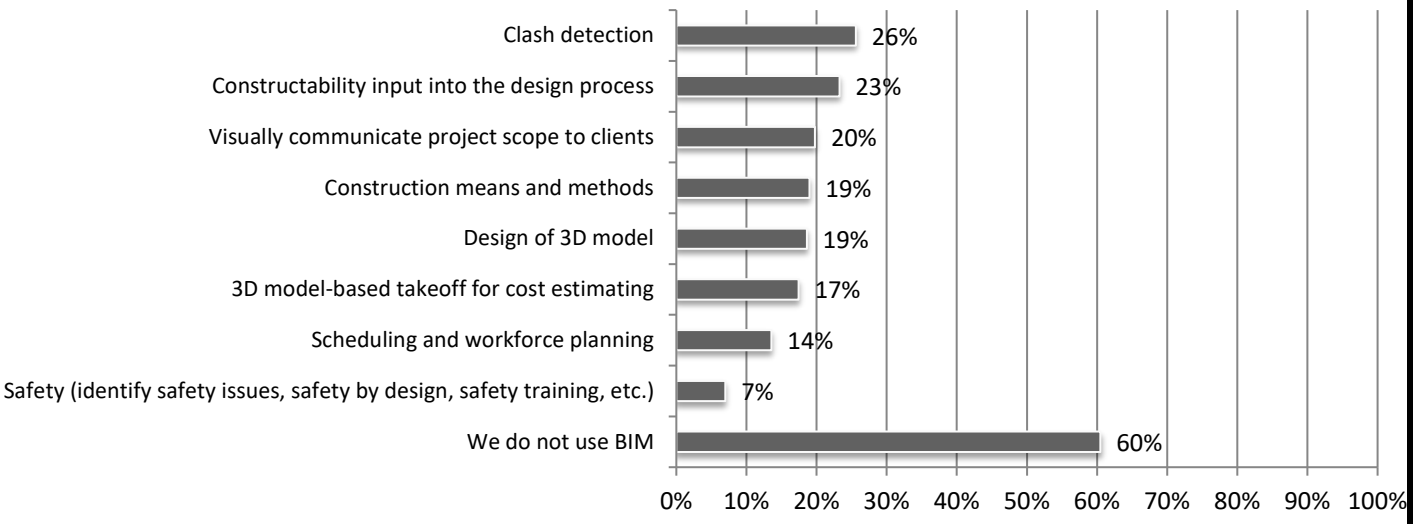
11. What challenges, if any, do you see regarding the safety and health of your firm's workers? (mark all that apply)



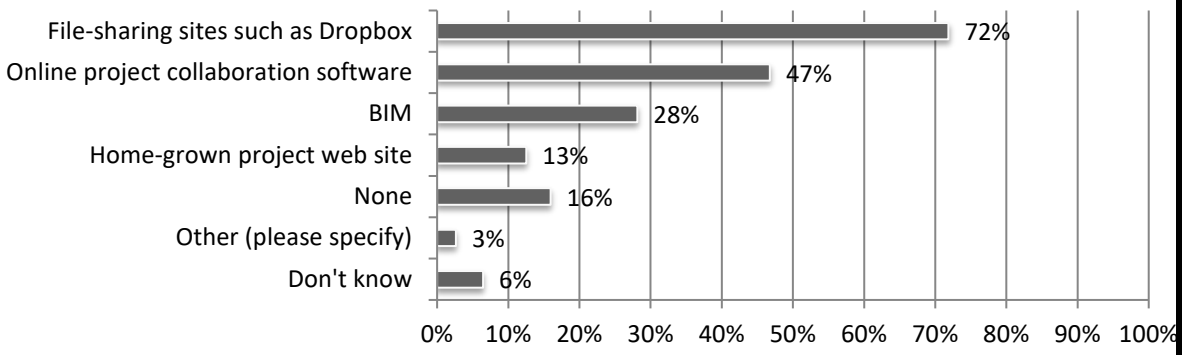
12. What change do you expect in 2020 in the number of your firm's projects that involve Building Information Modeling (BIM)?



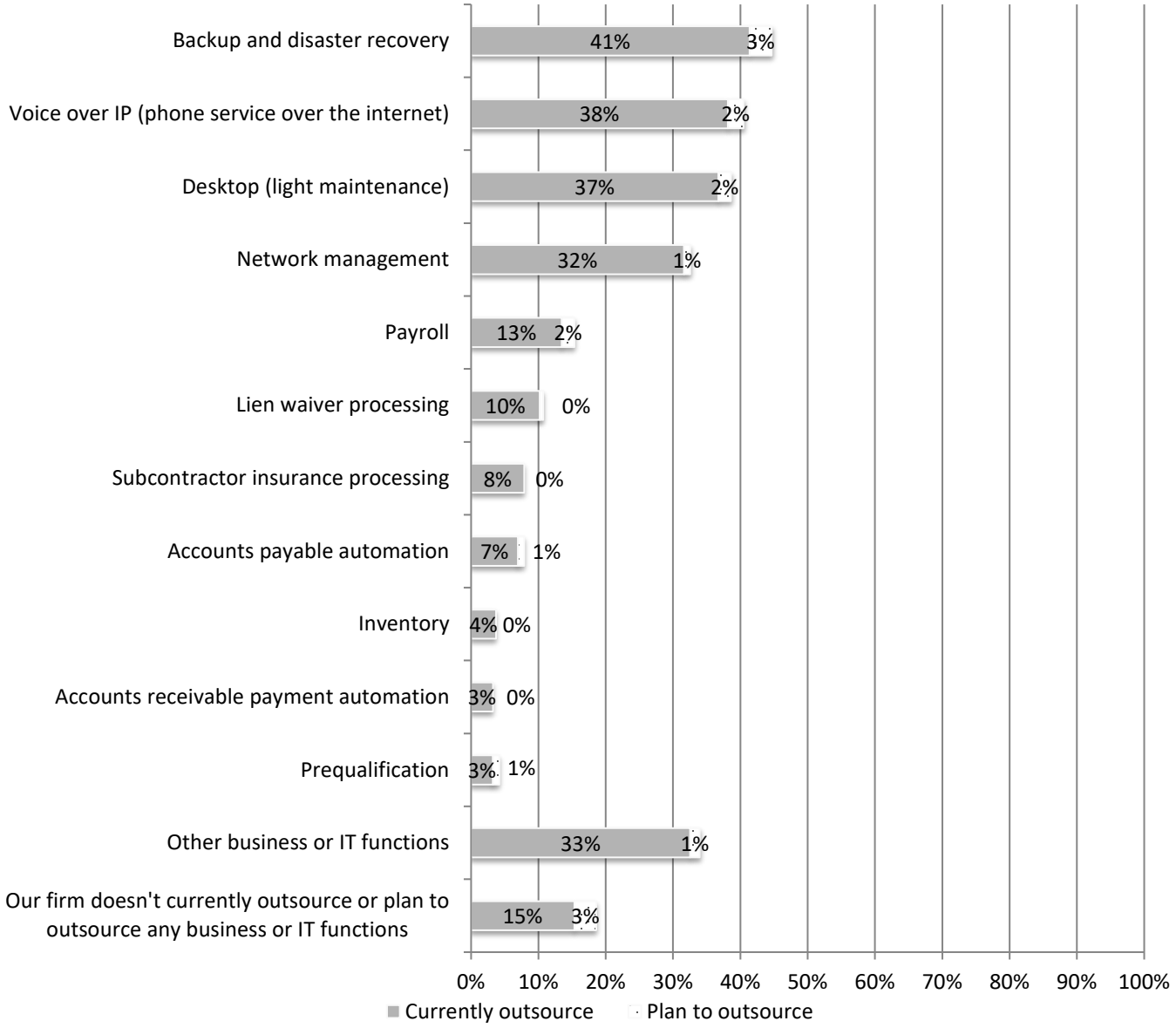
13. What is your firm using BIM for? (mark all that apply)



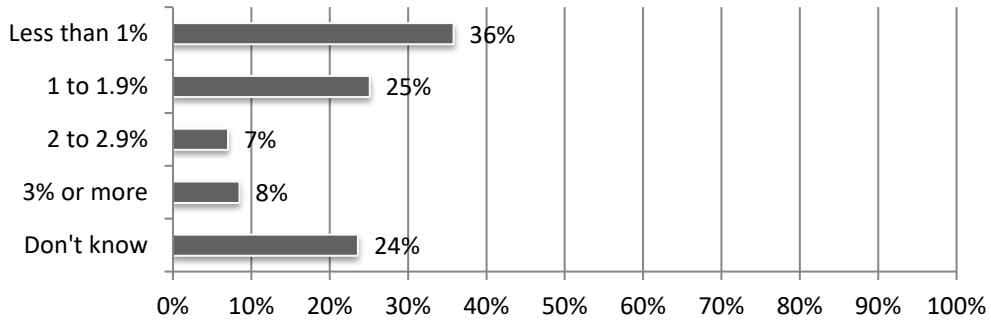
14. Does your firm use any of the following to collaborate with project partners (mark all that apply)?



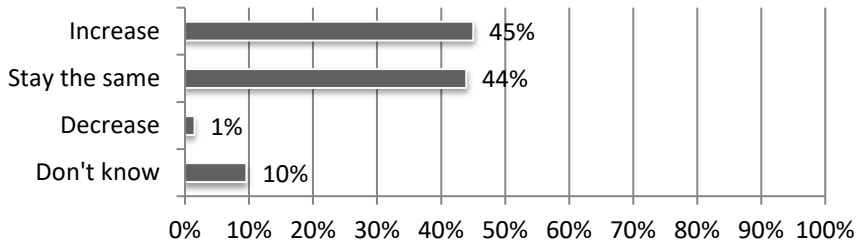
15. What business or IT functions does your firm outsource or plan to outsource to a technology provider? (mark all that apply)



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



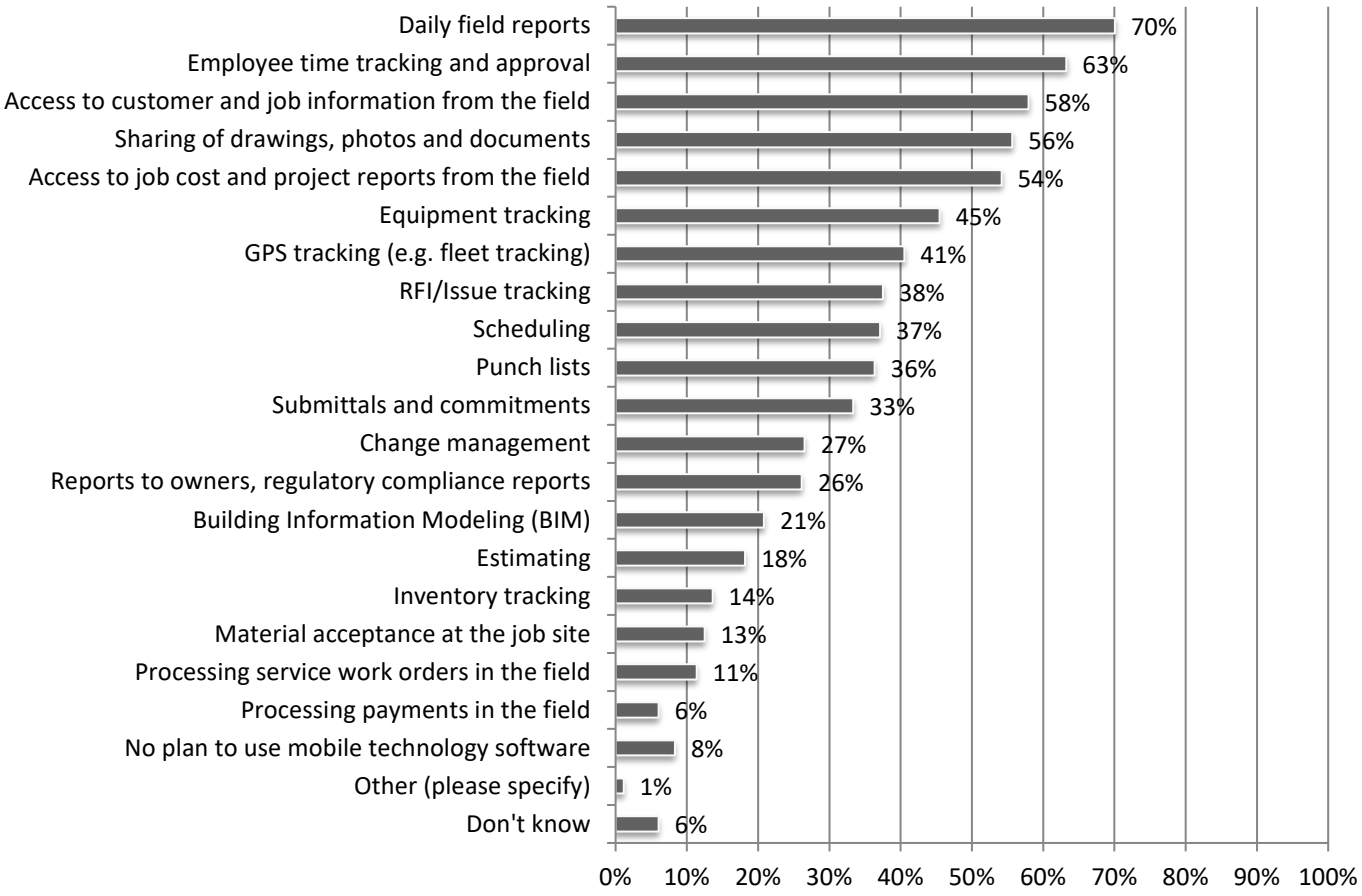
17. Compared to 2019, how will your firm's 2020 investment in IT change?



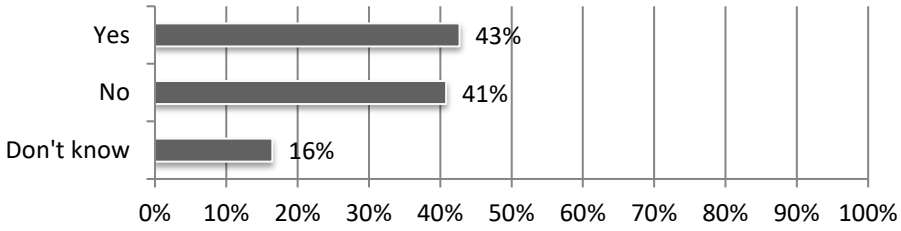
18. Compared to 2019, how will your firm's 2020 investment in the following technologies change? (mark all that apply)

Technologies	Increase	Stay the same	Decrease	Don't know
Project management software	27%	61%	1%	11%
Document management software	24%	68%	0%	8%
Fleet tracking/management software	24%	60%	2%	15%
Tool/asset management/tracking	22%	65%	2%	11%
Human resources (HR) software	22%	64%	0%	14%
Scheduling software	20%	70%	1%	9%
Estimating software	20%	71%	0%	9%
Client relationship management (CRM) software	18%	60%	0%	22%
Project collaboration software	17%	65%	0%	17%
Building Information Modeling (BIM)	17%	50%	0%	33%
Accounting software	16%	79%	0%	5%
Payroll software	13%	80%	0%	7%
Subcontractor bid management/ITB software	8%	74%	0%	17%
Prequalification software	7%	70%	0%	23%
Service management software	6%	67%	0%	26%
Other	16%	53%	0%	32%

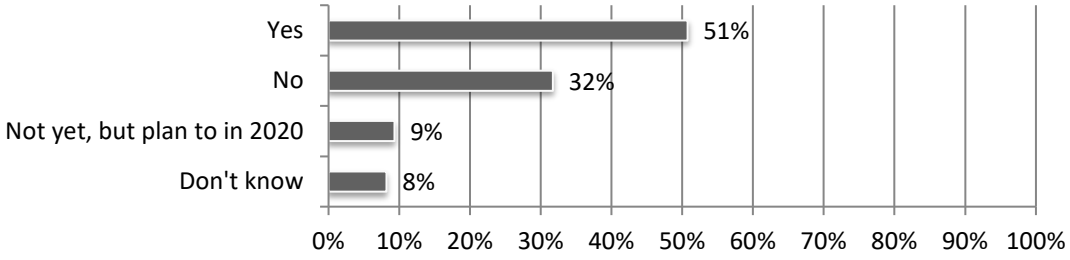
19. How does your company plan to use mobile software technology? (mark all that apply)



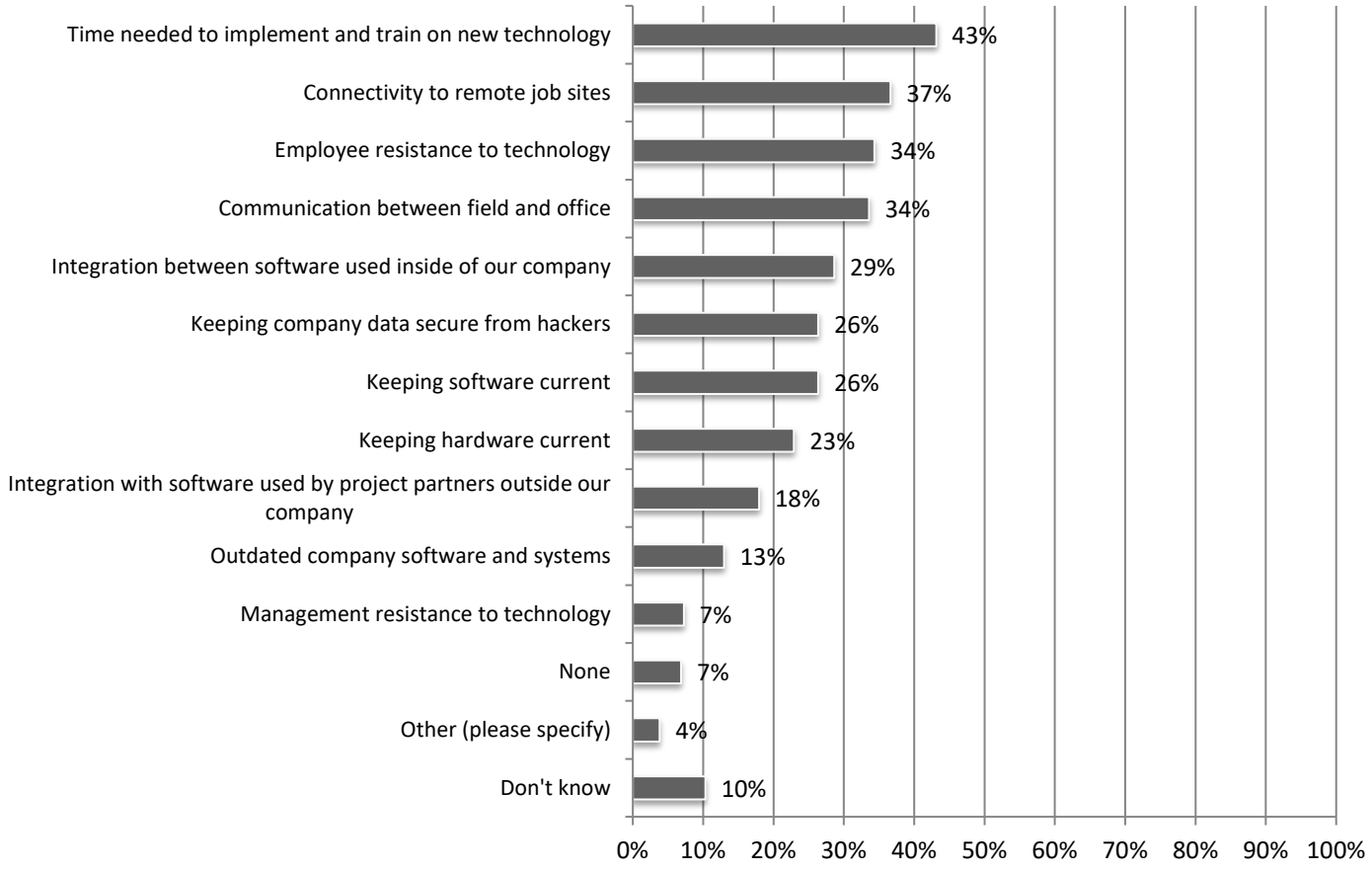
20. Does your firm currently have a mobile security plan in place?



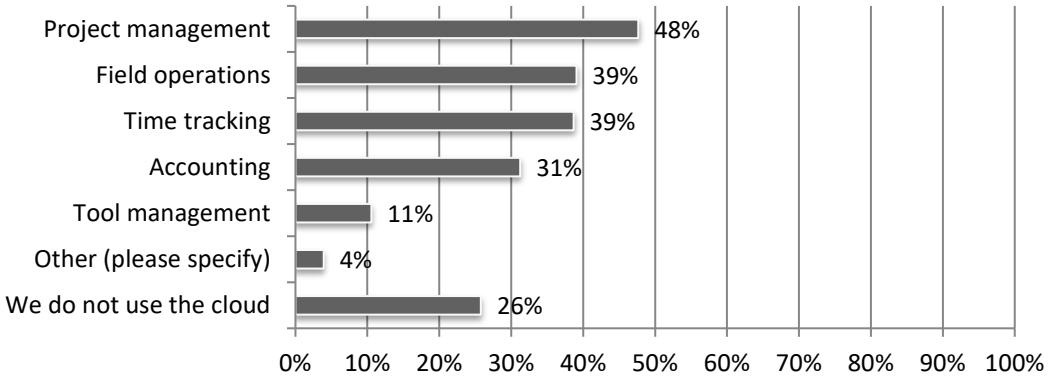
21. Does your firm currently have a formal IT plan to support your business objectives?



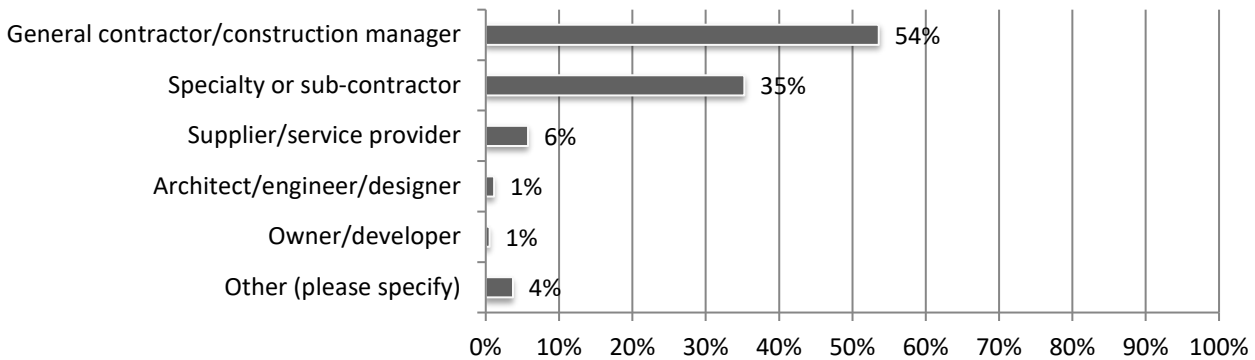
22. What are your biggest IT challenges? (mark all that apply)



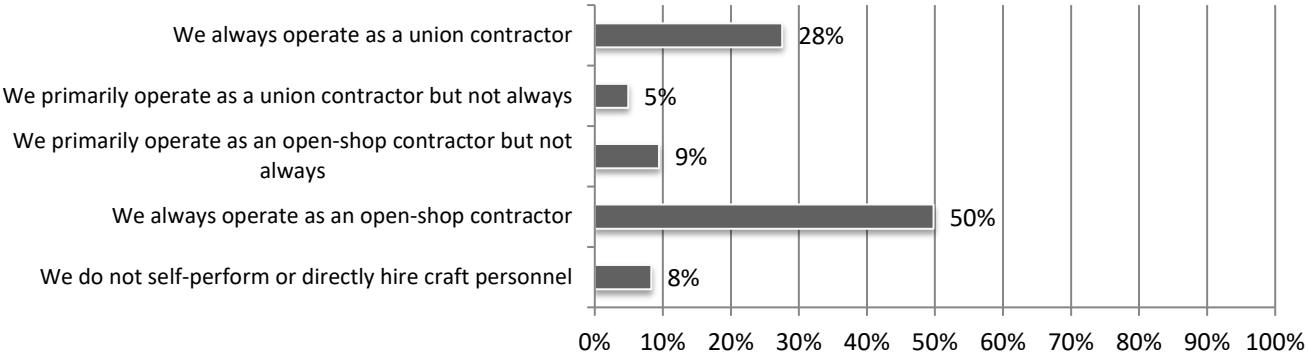
23. Does your firm use cloud-hosted technology in any of the following ways (mark all that apply)?



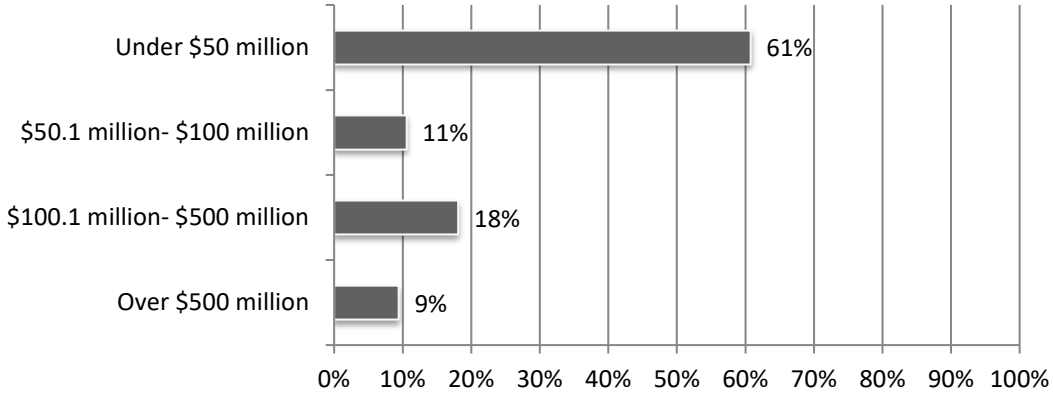
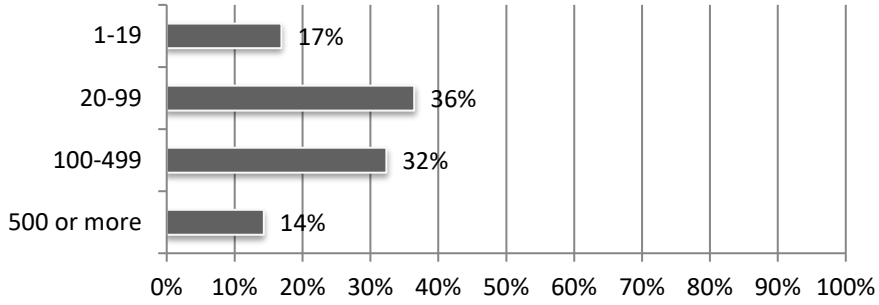
24. What best describes your firm?



25. When you self-perform construction work, do you operate as a union contractor or an open-shop contractor?



26. Estimate the total dollar amount of work your firm performed in 2019:



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