## 2022 Construction Outlook
### National Survey Results

*Total Responses: 1,031. 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 2021, do you expect the available dollar value of projects you compete for in 2022 to be higher/lower/about the same (answer for all market areas in which your business operates):
   Responses: 1,019

<table>
<thead>
<tr>
<th>Market</th>
<th>Higher</th>
<th>Lower</th>
<th>Same</th>
<th>Net*</th>
<th>2021 Net</th>
</tr>
</thead>
<tbody>
<tr>
<td>Bridge/Highway</td>
<td>63%</td>
<td>5%</td>
<td>32%</td>
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*Net equals difference between number of “Higher” and “Lower” responses as percent of total.
**Not asked in 2021 survey
2. What percent change do you expect in your headcount in 2022? Responses: 1,015

- Total Increase: 74%
- Increase of 1-10%: 47%
- Increase of 11-25%: 22%
- Increase of more than 25%: 5%
- Total Decrease: 9%
- Decrease of 1-10%: 6%
- Decrease of 11-25%: 3%
- Decrease of more than 25%: 0%
- No change: 16%

3. How would you describe your current situation in filling salaried and hourly craft positions? Responses: 1,006

- We are having a hard time filling some or all positions: 83%
- We are having no difficulty filling any positions: 8%
- We have no openings for positions: 9%

4. Do you expect any changes in the availability of hourly craft or salaried personnel over the coming 12 months? Responses: 1,006

- It will continue to be hard to hire: 49%
- It will become harder to hire: 26%
- No change: 19%
- It will become easier to hire: 6%
- It will continue to be easy to hire: 1%
5. Did your firm increase or decrease pay or benefits in 2021? (mark all that apply) Responses: 994

- Yes, increased base pay rates more in 2021 than in 2020: 62%
- Yes, provided similar or smaller increases in 2021 than 2020: 23%
- Yes, provided incentives/bonuses: 33%
- Yes, increased our portion of benefit contributions and/or improved employee benefits in 2020: 21%
- No increases in pay, incentives, or benefits in 2021: 12%

6. What impact, if any, has the pandemic had on your projects this year? (mark all that apply) Responses: 983

- Costs have been higher than we anticipated: 84%
- Projects have taken longer than we anticipated: 72%
- We have put higher prices into our bids or contracts: 69%
- We have put longer completion times into our bids or contracts: 44%
- We have won new projects or add-ons to existing projects: 29%
- No impact: 3%
7. How has your firm responded to supply-chain issues, if any? (mark all that apply) Responses: 970

- We have not had any significant supply chain problems: 10%
- We have turned to alternative suppliers: 61%
- We have specified alternative materials or products: 48%
- We have stockpiled items before winning contracts: 23%
- We have accelerated purchases after winning contracts: 67%

8. Did an owner postpone or cancel any projects that were scheduled to start in 2021 or 2022? (mark all that apply) Responses: 974

- No projects have been postponed or canceled: 35%
- Postponed in 2021 but rescheduled: 46%
- Postponed or canceled in 2021; not rescheduled: 32%
- Scheduled in January-June 2022 but postponed or canceled: 9%
- Scheduled to start in July 2022 or later but postponed or canceled: 5%
9. If projects were postponed or canceled, what was the main reason? Responses: 552

- Rising costs: 48%
- Delay in likely completion date: 11%
- Reduced funding available: 16%
- Reduced demand for completed project: 9%
- Don't know: 16%

10. When do you expect your firm’s volume of business will return to its normal level relative to one year earlier? Responses: 972

- Volume of business already matches or exceeds year-ago level: 52%
- 1-6 months: 11%
- More than 6 months (or never): 19%
- Don’t know: 17%
11. What are your biggest concerns for 2022? (mark all that apply) Responses: 973

- Material costs: 86%
- Availability/supply-chain disruptions: 79%
- Continuing impact of pandemic on projects, workers, or supply chain: 79%
- Worker shortages: 73%
- Impact of vaccination requirements on supply of workers: 66%
- Rising direct labor costs (pay, benefits, employer taxes): 58%
- Worker quality: 52%
- Other costs (e.g., trucking, insurance, services): 46%
- Federal regulations: 41%
- Subcontractor availability or quality: 39%
- State and local regulations: 28%
- Inadequate construction career education and training: 26%
- Increased competition for projects: 26%
- Impact of immigration policy on labor supply: 15%
- Safety: 14%
- Not enough private sector work: 13%
- Relations with owners, subs and/or vendors: 12%
- Inadequate funding for infrastructure: 8%
- Inadequate funding for public building projects: 8%
- Other: 2%
**12. What challenges, if any, do you see regarding the safety and health of your firm's workers (mark all that apply)? Responses: 884**

- Inexperienced skilled labor/workforce shortage: 83%
- Lack of cooperation from government agencies or regulators: 29%
- Low quality of available safety and health training: 6%
- Poor subcontractor safety and health performance: 23%
- Safety hazards created by 3rd parties (e.g. motorist crashes into work zones): 18%
- Other: 4%

**13. Compared to 2021, will your firm’s 2022 investment in the following technologies change? (mark all that apply) Responses: 933**

<table>
<thead>
<tr>
<th>Technology</th>
<th>Increase</th>
<th>Decrease</th>
<th>No change</th>
</tr>
</thead>
<tbody>
<tr>
<td>Document management software</td>
<td>33%</td>
<td>1%</td>
<td>66%</td>
</tr>
<tr>
<td>Project management software</td>
<td>31%</td>
<td>2%</td>
<td>67%</td>
</tr>
<tr>
<td>Estimating software</td>
<td>27%</td>
<td>1%</td>
<td>72%</td>
</tr>
<tr>
<td>Tool/asset management/tracking</td>
<td>25%</td>
<td>1%</td>
<td>73%</td>
</tr>
<tr>
<td>Accounting software</td>
<td>25%</td>
<td>2%</td>
<td>74%</td>
</tr>
<tr>
<td>Human resources (HR) software</td>
<td>24%</td>
<td>1%</td>
<td>75%</td>
</tr>
<tr>
<td>Fleet tracking/management software</td>
<td>23%</td>
<td>2%</td>
<td>75%</td>
</tr>
<tr>
<td>Scheduling software</td>
<td>22%</td>
<td>2%</td>
<td>76%</td>
</tr>
<tr>
<td>Client relationship management (CRM) software</td>
<td>22%</td>
<td>2%</td>
<td>77%</td>
</tr>
<tr>
<td>Building Information Modeling (BIM)</td>
<td>20%</td>
<td>1%</td>
<td>79%</td>
</tr>
<tr>
<td>Project collaboration software</td>
<td>19%</td>
<td>1%</td>
<td>80%</td>
</tr>
<tr>
<td>Payroll software</td>
<td>18%</td>
<td>2%</td>
<td>81%</td>
</tr>
<tr>
<td>Subcontractor bid management/ITB software</td>
<td>12%</td>
<td>1%</td>
<td>87%</td>
</tr>
<tr>
<td>Service management software</td>
<td>10%</td>
<td>1%</td>
<td>89%</td>
</tr>
<tr>
<td>Prequalification software</td>
<td>10%</td>
<td>1%</td>
<td>89%</td>
</tr>
</tbody>
</table>
14. How does your company plan to use mobile software technology? (Mark all that apply) Responses: 910

- Daily field reports: 68%
- Employee time tracking and approval: 60%
- Access to customer and job information from the field: 57%
- Sharing of drawings, photos and documents: 55%
- Access to job cost and project reports from the field: 47%
- Punch lists: 42%
- Equipment tracking: 40%
- RFI/Issue tracking: 38%
- Scheduling: 35%
- GPS tracking (e.g. fleet tracking): 33%
- Submittals and commitments: 33%
- Change management: 28%
- Reports to owners, regulatory compliance reports: 27%
- Building Information Modeling (BIM): 21%
- Estimating: 16%
- Inventory tracking: 16%
- Material acceptance at the job site: 15%
- Processing service work orders in the field: 14%
- No plan to use mobile technology software: 7%
- Processing payments in the field: 7%
- Don’t know: 5%
- Other: 1%
15. Does your firm currently have a formal IT plan to support your business objectives? Responses: 932

- Yes: 61%
- No: 29%
- Not yet, but plan to in 2022: 7%
- Don't know: 4%

16. What are your biggest IT challenges (mark all that apply)? Responses: 908

- Time needed to implement and train on new technology: 41%
- Keeping company data secure from hackers: 39%
- Employee resistance to technology: 37%
- Connectivity to remote job sites: 35%
- Communication between field and office: 34%
- Integration between software used inside our company: 27%
- Keeping software current: 22%
- Keeping hardware current: 18%
- Integration with software used by project partners outside our company: 17%
- Outdated company software and systems: 13%
- Management resistance to technology: 9%
- None: 8%
- Don’t know: 5%
- Other: 2%
17. Does your firm use cloud-hosted technology in any of the following ways (mark all that apply)?
Responses: 882

- Accounting: 45%
- Field operations: 47%
- Project management: 56%
- Time tracking: 41%
- Tool management: 15%
- We do not use the cloud: 22%
- Other: 4%


- General contractor/construction manager: 54%
- Specialty or sub-contractor: 34%
- Supplier/service provider: 6%
- Architect/engineer/designer: 2%
- Owner/developer: 1%
- Other: 3%

19. When you self-perform construction work, do you operate as a union contractor or an open-shop contractor? Responses: 903

- We always operate as a union contractor: 25%
- We primarily operate as a union contractor but not always: 6%
- We primarily operate as an open-shop contractor but not always: 7%
- We always operate as an open-shop contractor: 52%
- We do not self-perform or directly hire craft personnel: 10%
20. Estimate the total dollar amount of work your firm performed in 2021. Responses: 905

- $50 million or under: 62%
- $50.1 million - $500 million: 31%
- Over $500 million: 7%

21. How many total employees does your firm employ at all of its locations? Responses: 909

- 1-19: 16%
- 20-99: 42%
- 100-499: 33%
- 500 or more: 10%