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2022 Construction Outlook South Survey Results

Total Responses: 328. Responses varied for some questions. Percentages are based on responses to each question and may not sum to 100 due to rounding.

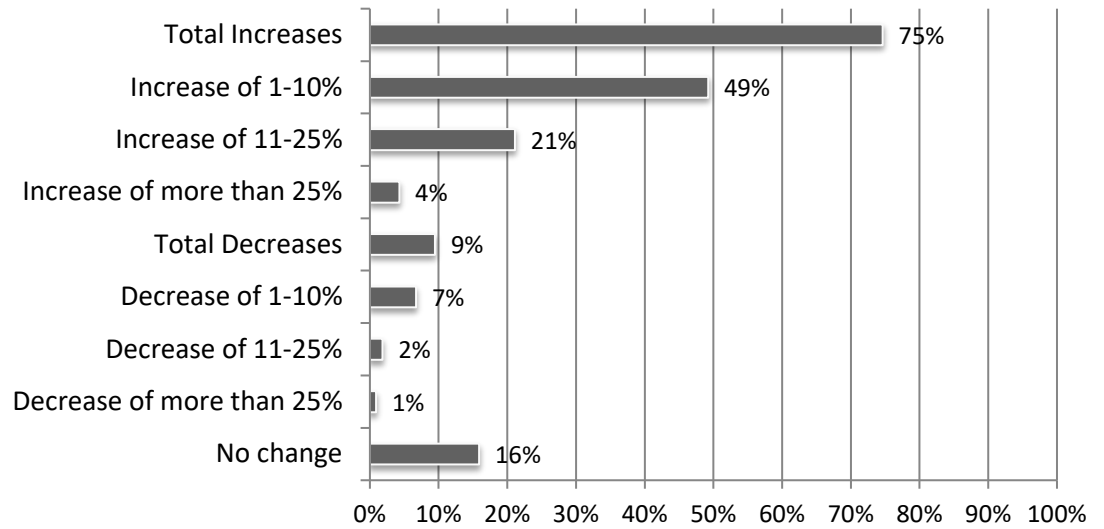
- 1. Compared to 2021, do you expect the available dollar value of projects you compete for in 2022 to be higher/lower/about the same (answer for all market areas in which your business operates):**

Responses: 326

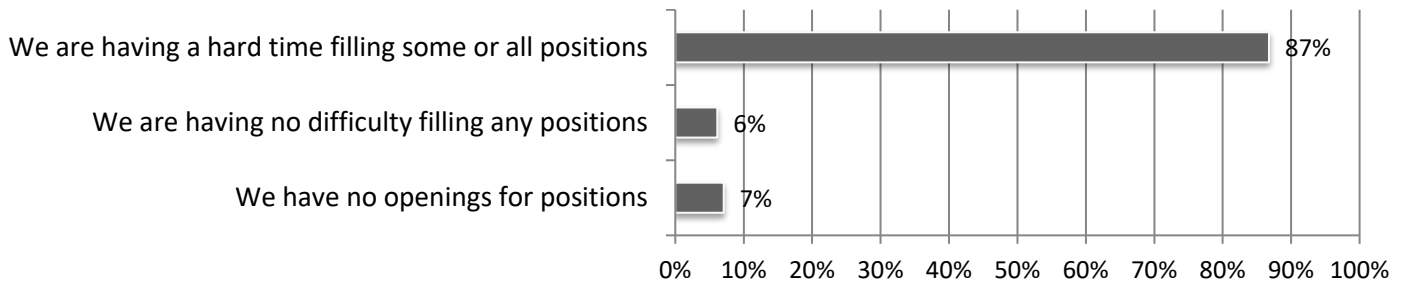
| Market | Higher | Lower | Same | Net* | US Net |
|---|--------|-------|------|------|--------|
| Bridge/Highway | 66% | 4% | 29% | 62% | 57% |
| Transportation | 60% | 6% | 35% | 54% | 51% |
| Hospital | 59% | 6% | 35% | 53% | 38% |
| Water/Sewer | 57% | 2% | 40% | 55% | 50% |
| Other Healthcare (e.g., clinic, testing or screening facility, medical lab) | 56% | 5% | 40% | 51% | 41% |
| Multifamily Residential | 55% | 16% | 29% | 38% | 32% |
| Warehouse | 52% | 10% | 38% | 42% | 41% |
| Manufacturing | 50% | 15% | 34% | 35% | 27% |
| Federal (e.g., VA, GSA, USACE, NAVFAC) | 49% | 9% | 42% | 39% | 37% |
| Data Center | 48% | 11% | 41% | 36% | 31% |
| K-12 School | 42% | 16% | 42% | 26% | 19% |
| Power | 41% | 8% | 50% | 33% | 35% |
| Public Building | 41% | 15% | 45% | 26% | 20% |
| Higher Education | 37% | 18% | 44% | 19% | 16% |
| Retail | 36% | 31% | 32% | 5% | -8% |
| Lodging | 36% | 23% | 42% | 13% | 6% |
| Private Office | 33% | 30% | 37% | 2% | -8% |

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

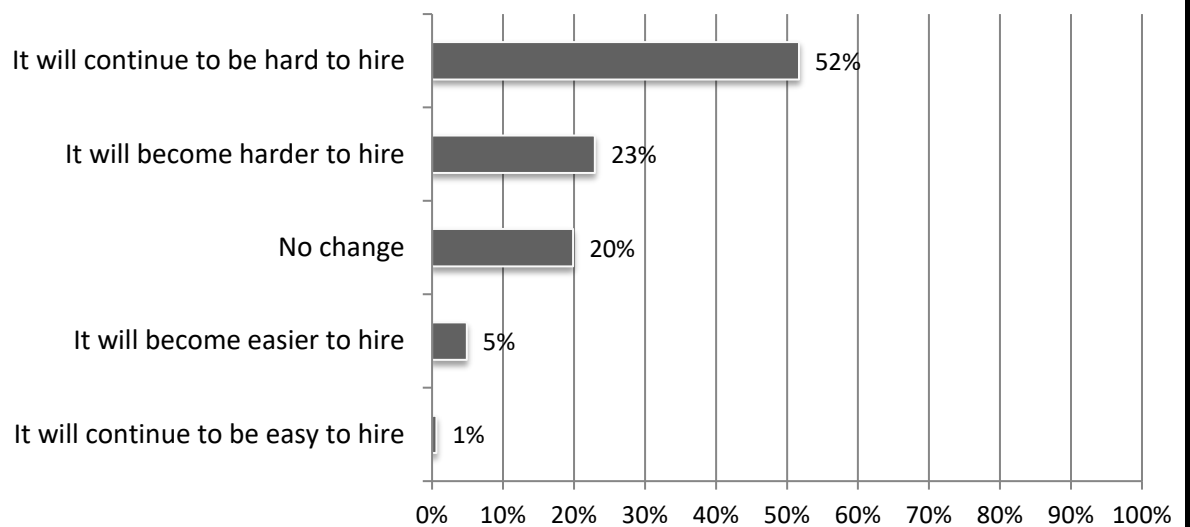
2. What percent change do you expect in your headcount in 2022? Responses: 327



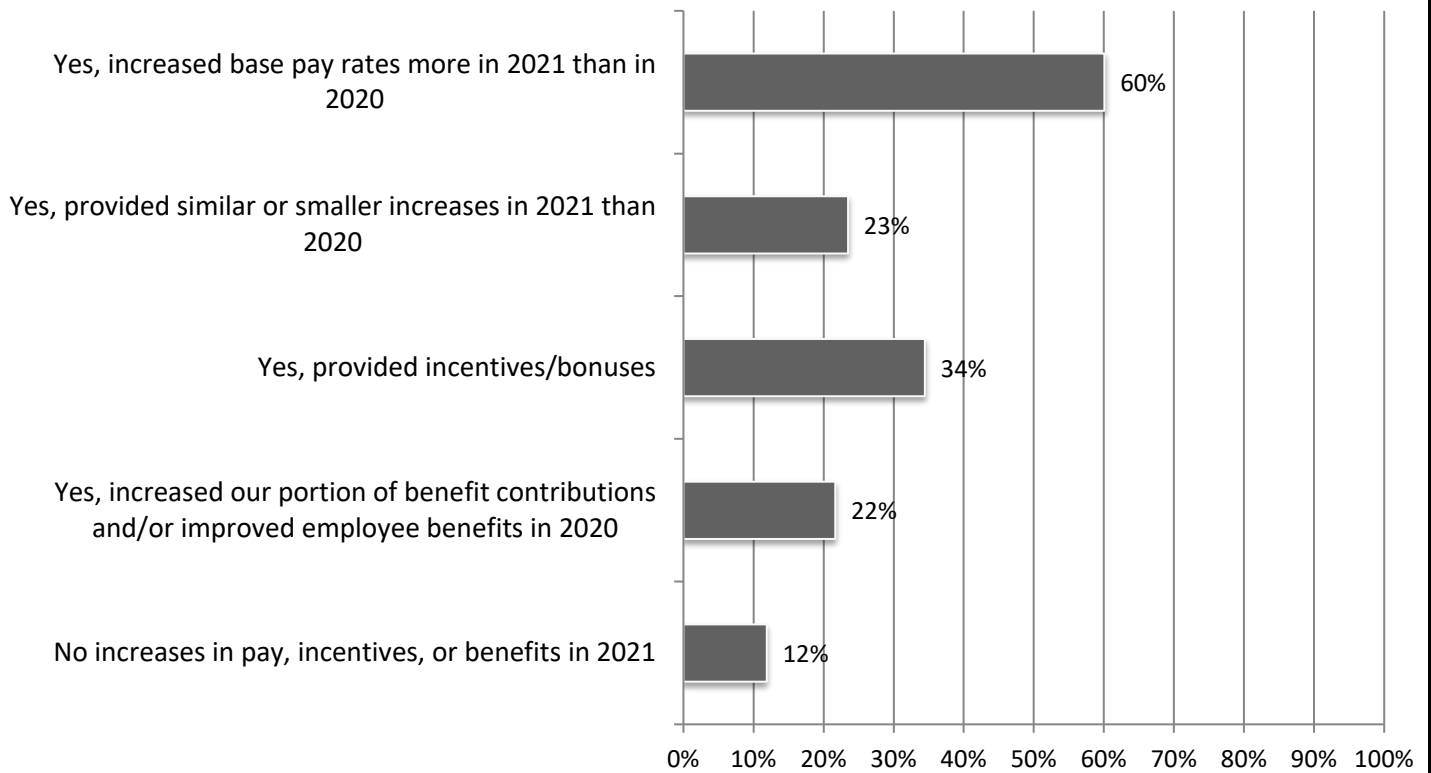
3. How would you describe your current situation in filling salaried and hourly craft positions? Responses: 325



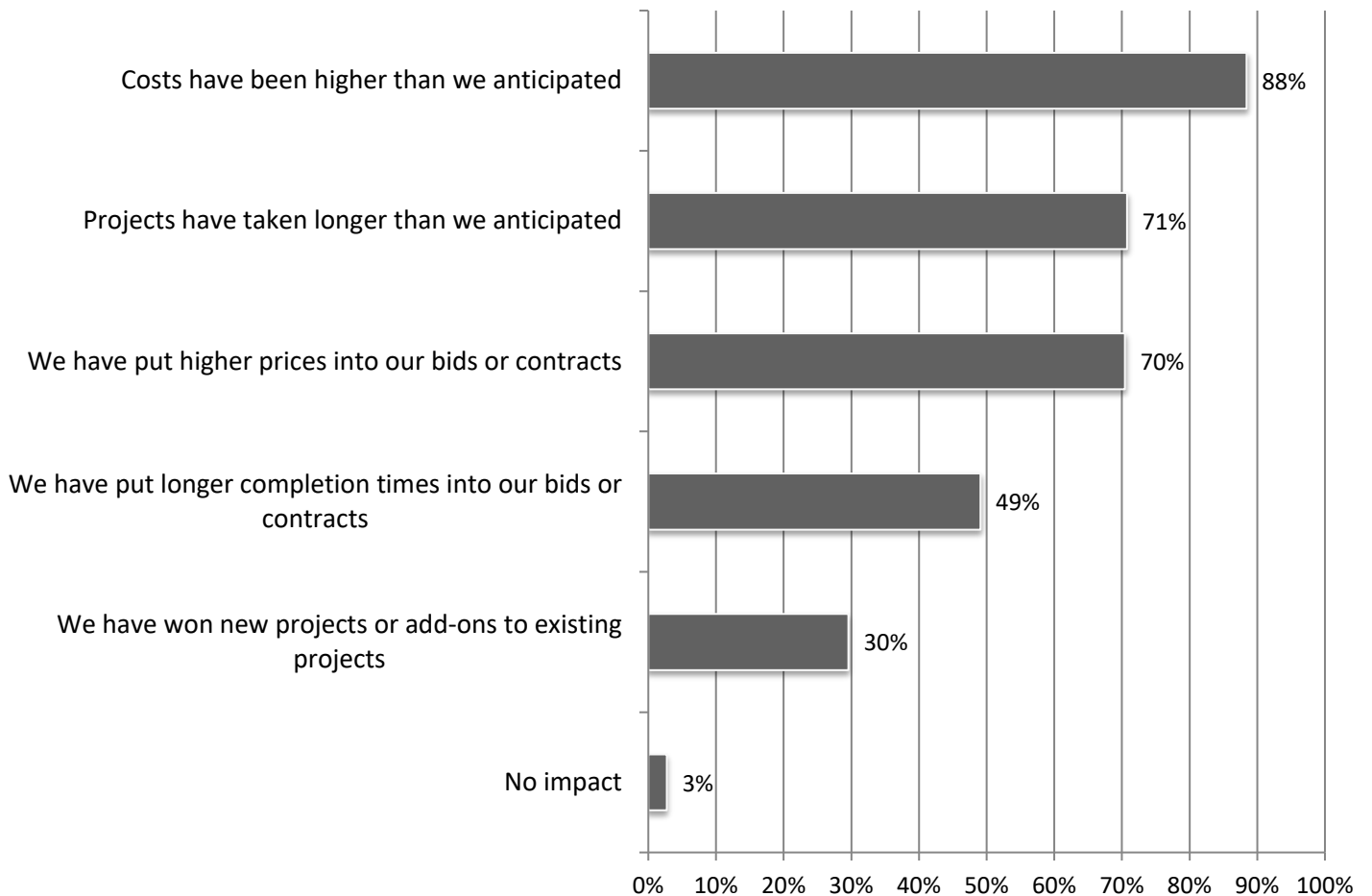
4. Do you expect any changes in the availability of hourly craft or salaried personnel over the coming 12 months? Responses: 327



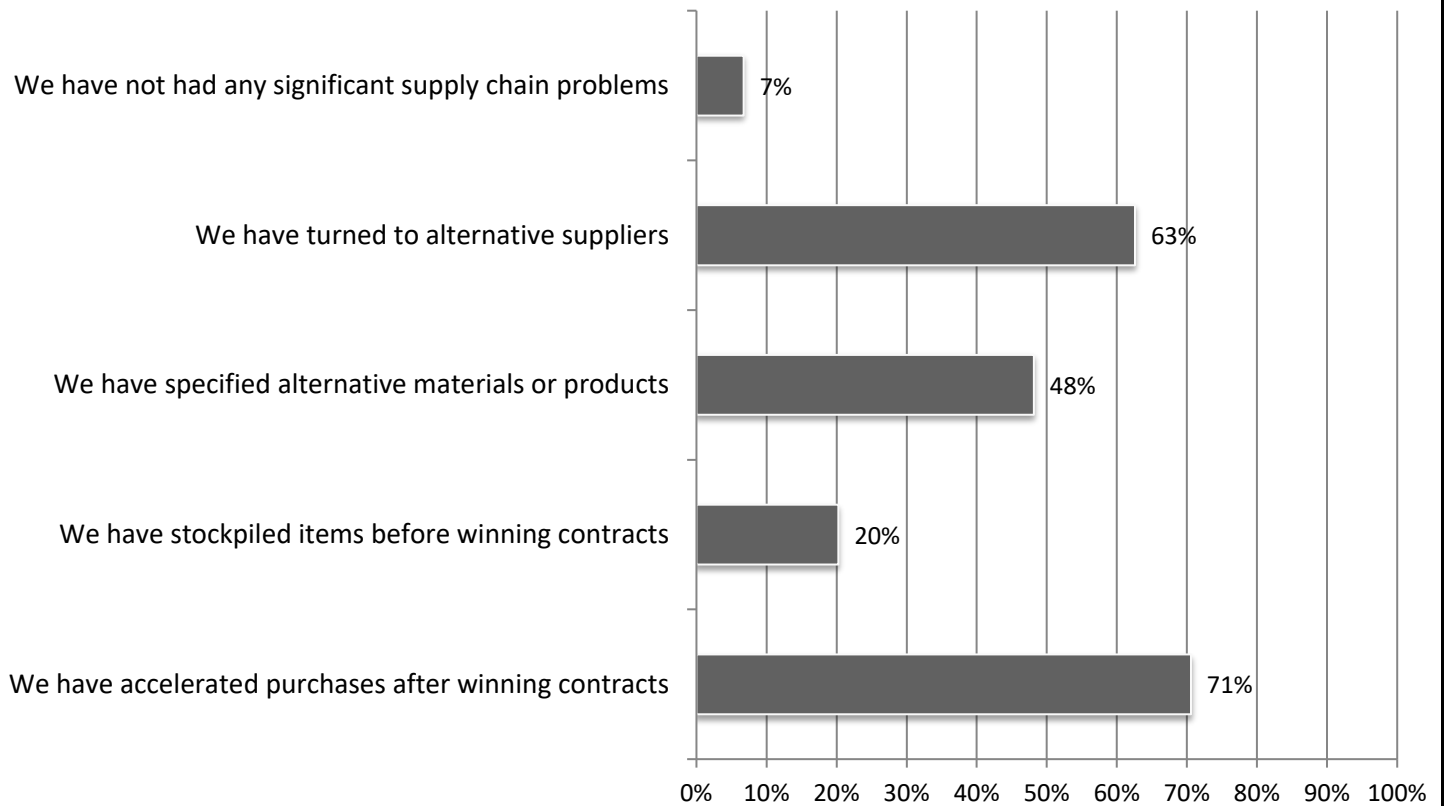
5. Did your firm increase or decrease pay or benefits in 2021? (mark all that apply) Responses: 328



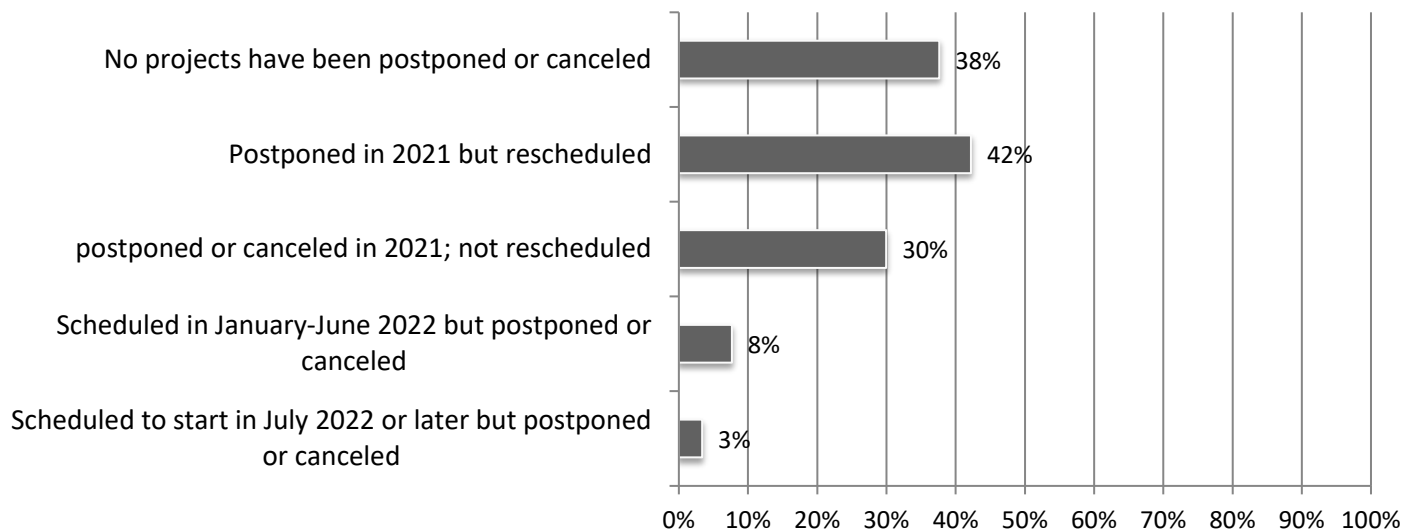
6. What impact, if any, has the pandemic had on your projects this year? (mark all that apply) Responses: 328



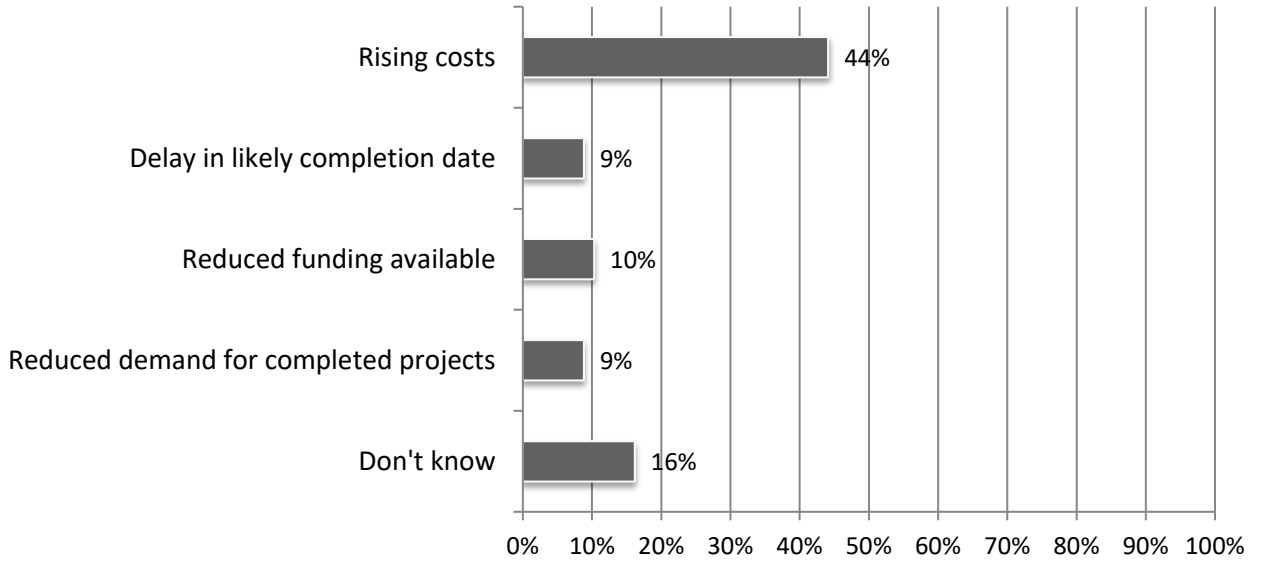
7. How has your firm responded to supply-chain issues, if any? (mark all that apply) Responses: 326



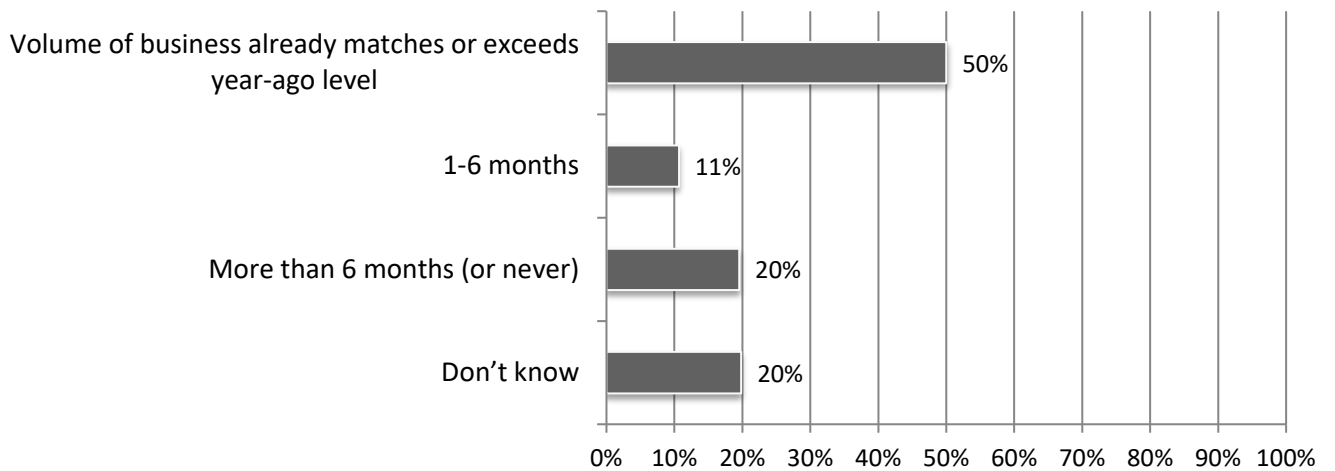
8. Did an owner postpone or cancel any projects that were scheduled to start in 2021 or 2022? (mark all that apply) Responses: 327



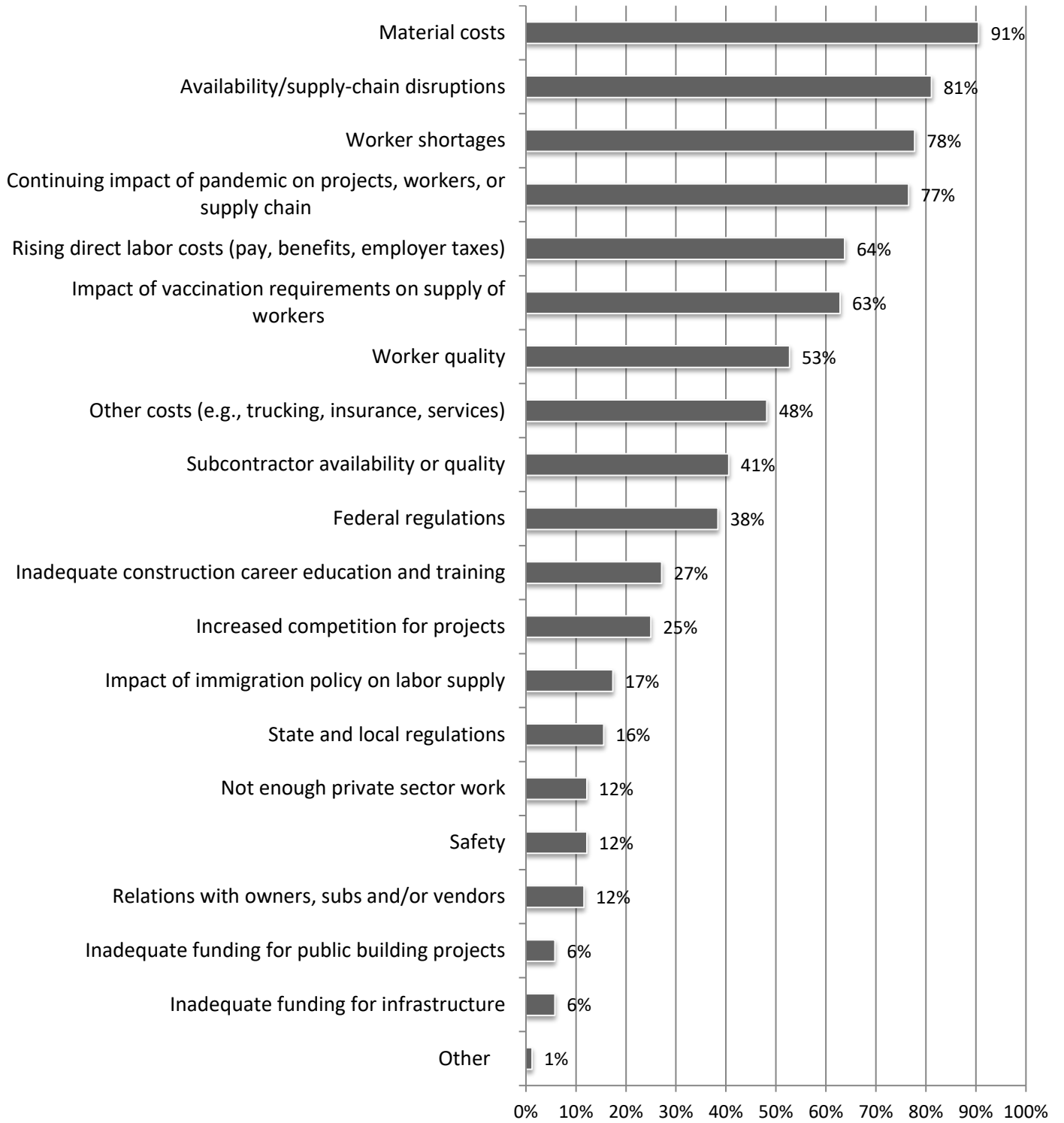
9. If projects were postponed or canceled, what was the main reason? Responses: 204



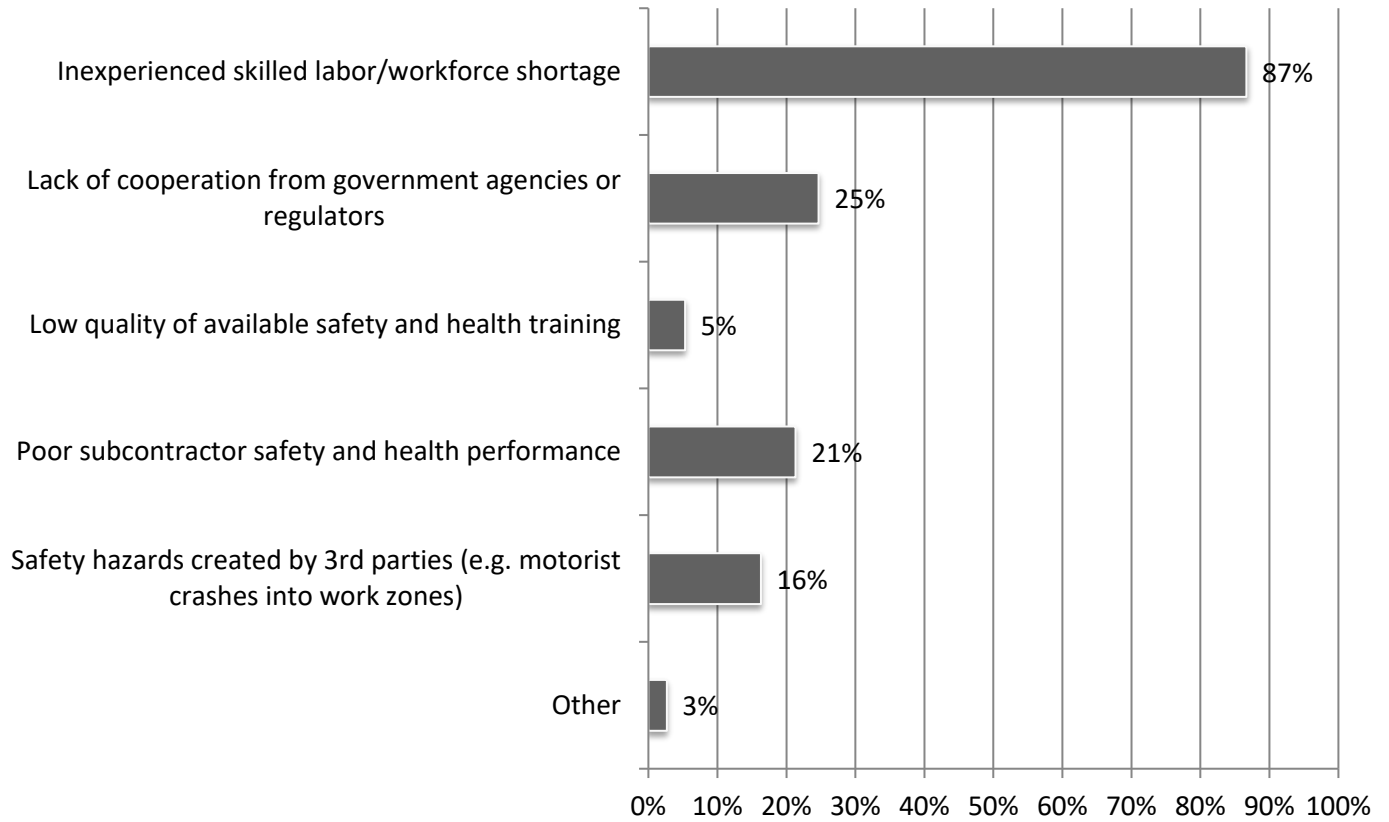
10. When do you expect your firm's volume of business will return to its normal level relative to one year earlier? Responses: 328



11. What are your biggest concerns for 2022? (mark all that apply) Responses: 328



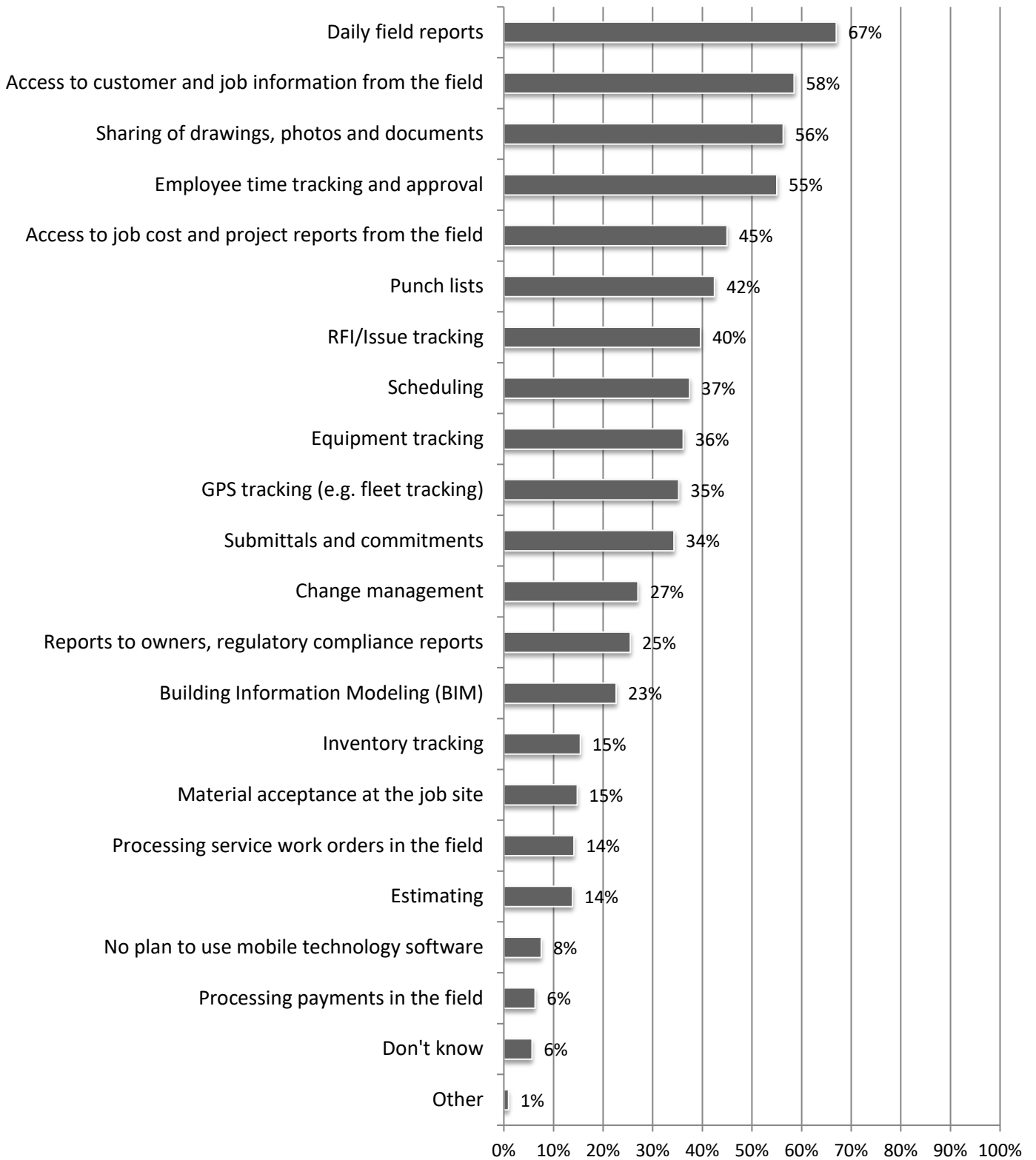
12. What challenges, if any, do you see regarding the safety and health of your firm's workers (mark all that apply)? Responses: 300



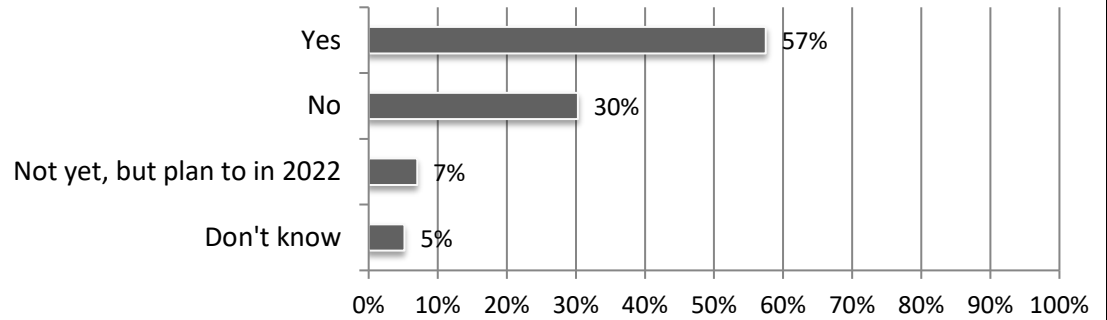
13. Compared to 2021, will your firm's 2022 investment in the following technologies change? (mark all that apply) Responses: 318

| | Increase | Decrease | No change |
|---|----------|----------|-----------|
| Estimating software | 32% | 1% | 68% |
| Document management software | 31% | 1% | 67% |
| Project management software | 31% | 2% | 67% |
| Accounting software | 27% | 1% | 72% |
| Human resources (HR) software | 25% | 1% | 73% |
| Scheduling software | 23% | 1% | 76% |
| Fleet tracking/management software | 22% | 1% | 76% |
| Tool/asset management/tracking | 22% | 2% | 76% |
| Building Information Modeling (BIM) | 21% | 1% | 78% |
| Client relationship management (CRM) software | 21% | 2% | 77% |
| Project collaboration software | 19% | 1% | 80% |
| Payroll software | 18% | 0% | 82% |
| Service management software | 14% | 1% | 85% |
| Subcontractor bid management/ITB software | 13% | 2% | 85% |
| Prequalification software | 12% | 2% | 87% |

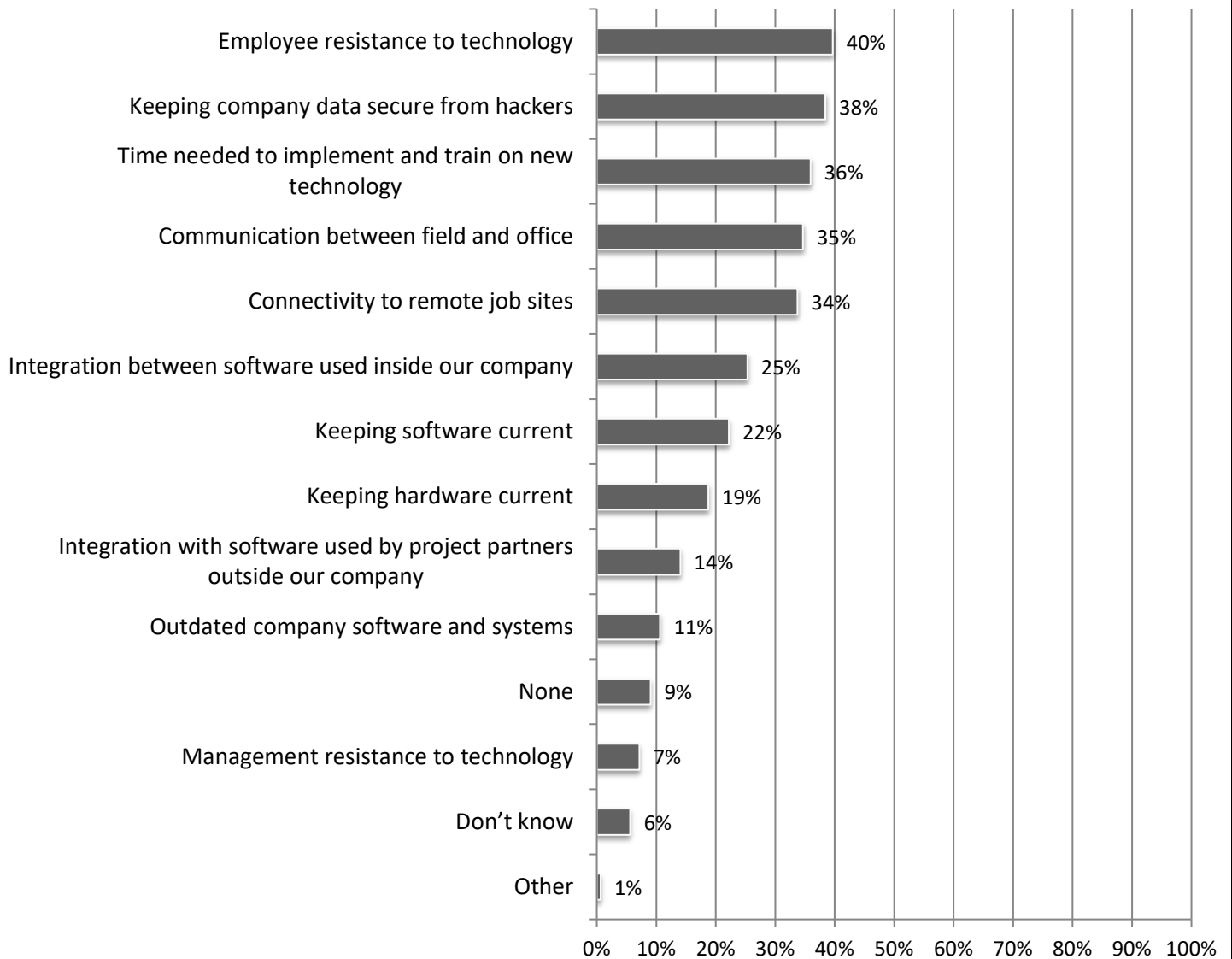
14. How does your company plan to use mobile software technology? (Mark all that apply) Responses: 318



15. Does your firm currently have a formal IT plan to support your business objectives? Responses: 327

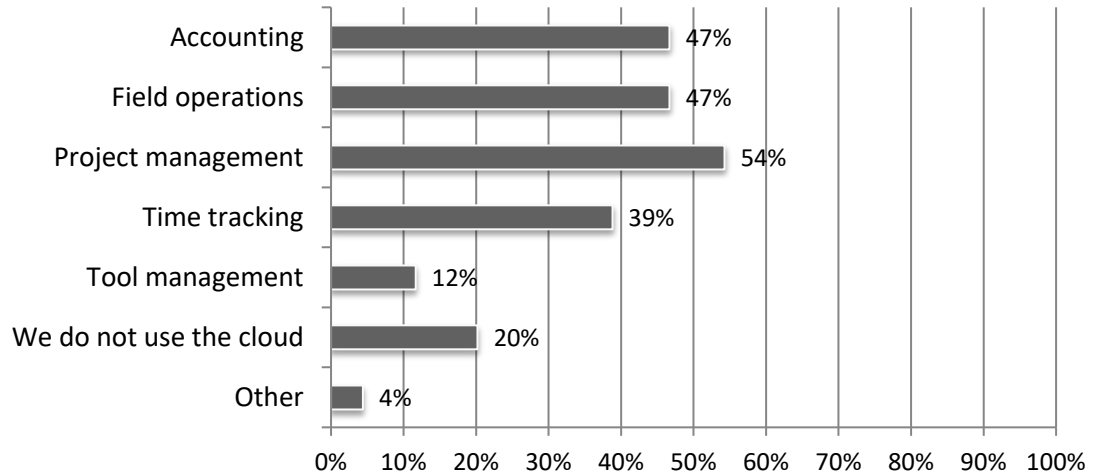


16. What are your biggest IT challenges (mark all that apply)? Responses: 320

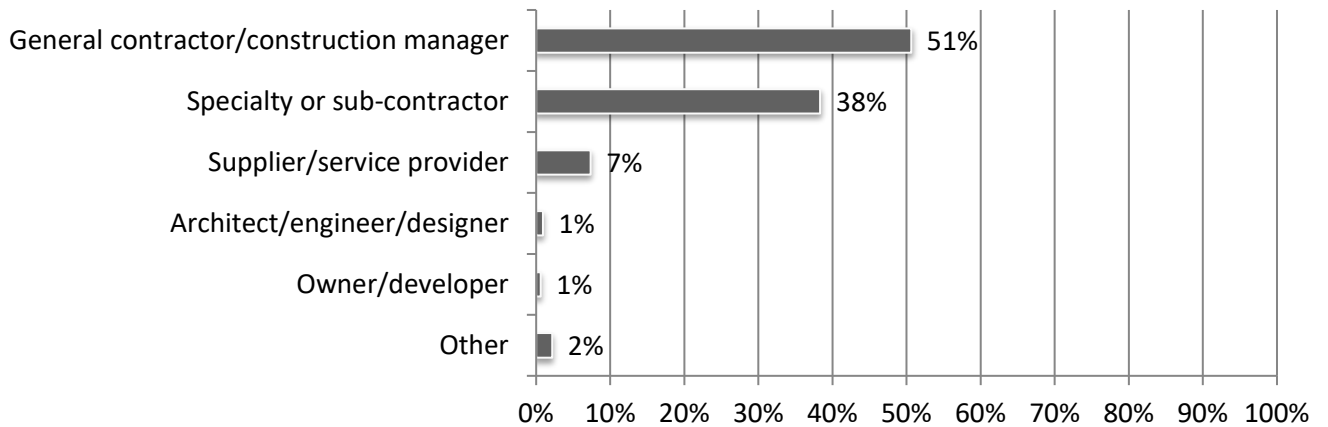


17. Does your firm use cloud-hosted technology in any of the following ways (mark all that apply)?

Responses: 317

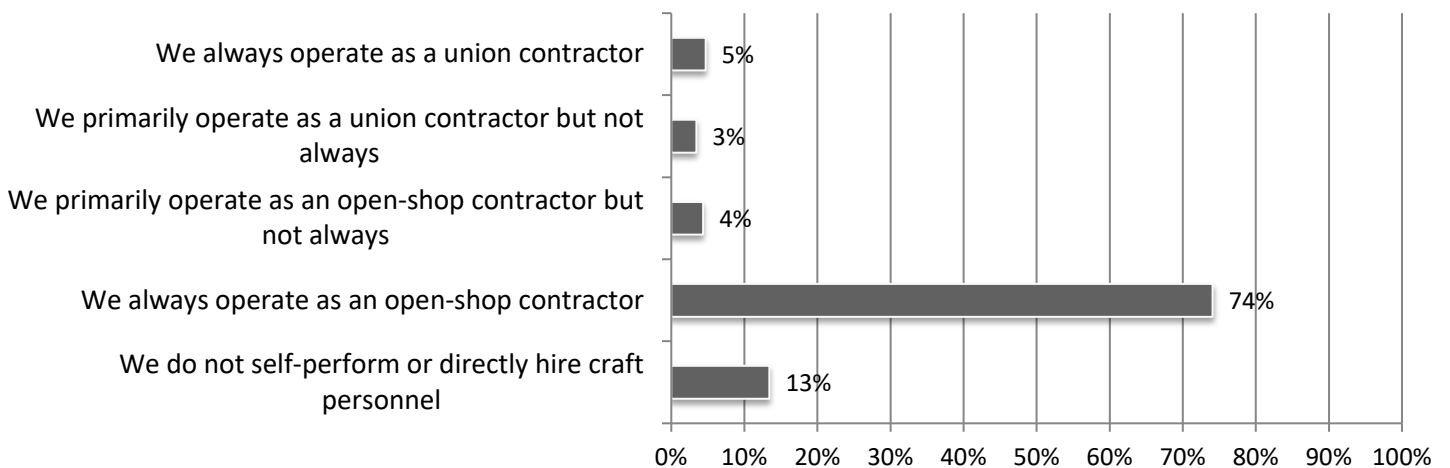


18. What best describes your firm? Responses: 326

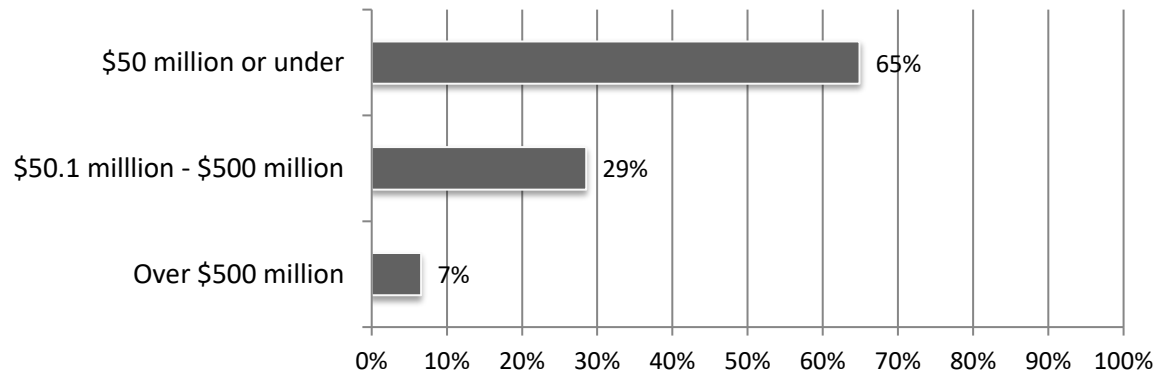


19. When you self-perform construction work, do you operate as a union contractor or an open-shop contractor?

Responses: 320



20. Estimate the total dollar amount of work your firm performed in 2021. Responses: 319



21. How many total employees does your firm employ at all of its locations? Responses: 321

