



AGC
THE CONSTRUCTION
ASSOCIATION

Sage

2023 Construction Outlook North Carolina Survey Results

Total Responses: 33. Responses varied for some questions. Percentages are based on responses to each question and may not sum to 100 due to rounding.

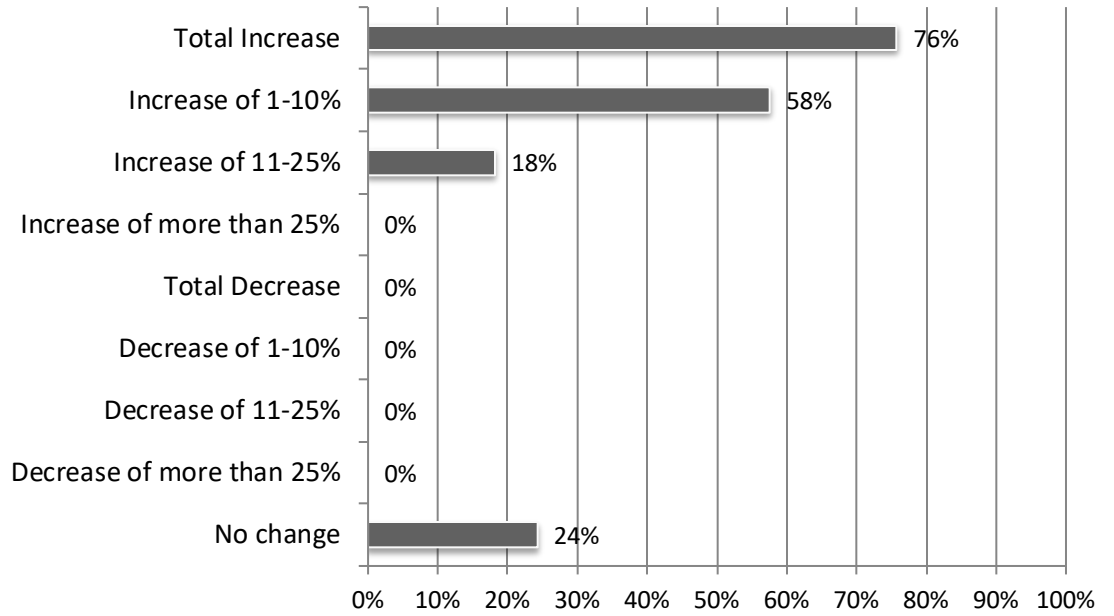
1. Compared to 2022, do you expect the available dollar value of projects you compete for in 2023 to be higher/lower/about the same? (answer for all market areas in which your business operates)

Responses: 32

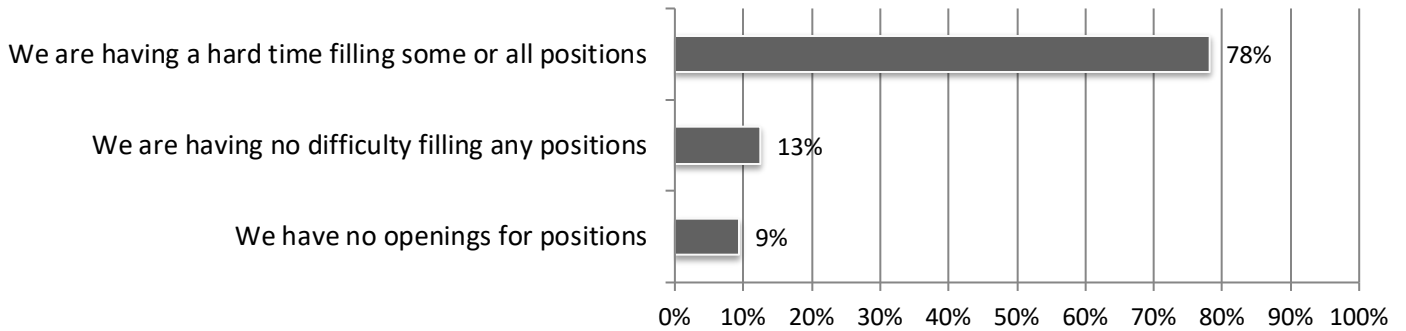
Market	Higher	Lower	Same	Net*	US Net
Transportation (e.g., transit, rail, airport)	56%	0%	44%	56%	42%
Water/Sewer	44%	0%	56%	44%	38%
Bridge/Highway	42%	8%	50%	33%	42%
Other	25%	0%	75%	25%	10%
Manufacturing	33%	11%	56%	22%	14%
K-12 School	37%	16%	47%	21%	16%
Federal (e.g., VA, GSA, USACE, NAVFAC)	32%	11%	58%	21%	37%
Higher Education	32%	16%	53%	16%	16%
Hospital	31%	19%	50%	13%	23%
Public Building	26%	16%	58%	11%	23%
Data Center	15%	8%	77%	8%	12%
Other Healthcare	19%	19%	63%	0%	28%
Multifamily Residential	25%	25%	50%	0%	1%
Power	8%	8%	83%	0%	28%
Lodging	14%	14%	71%	0%	-4%
Warehouse	17%	22%	61%	-6%	10%
Private Office	11%	28%	61%	-17%	-21%
Retail	0%	36%	64%	-36%	-22%

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

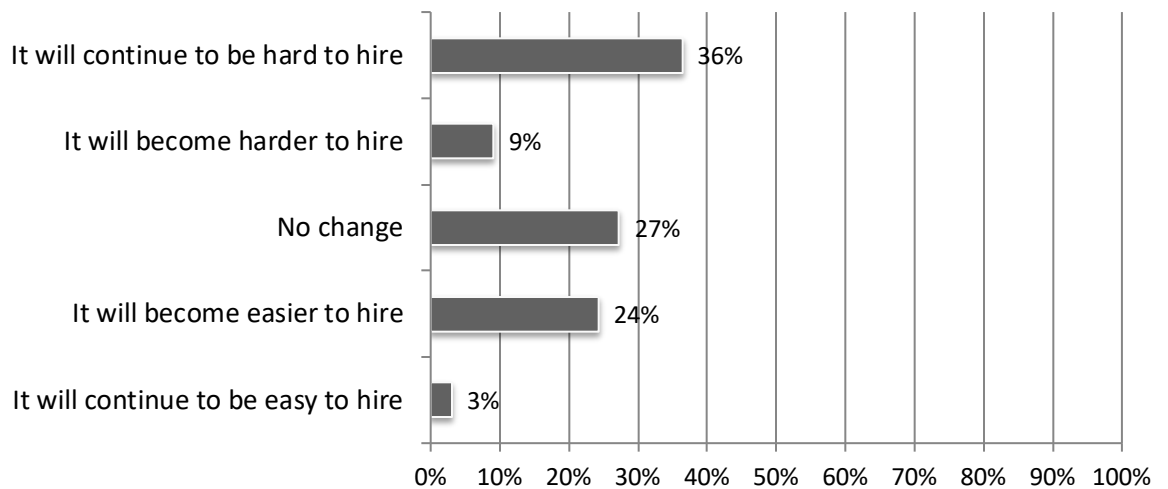
2. What percent change do you expect in your headcount in 2023? Responses: 33



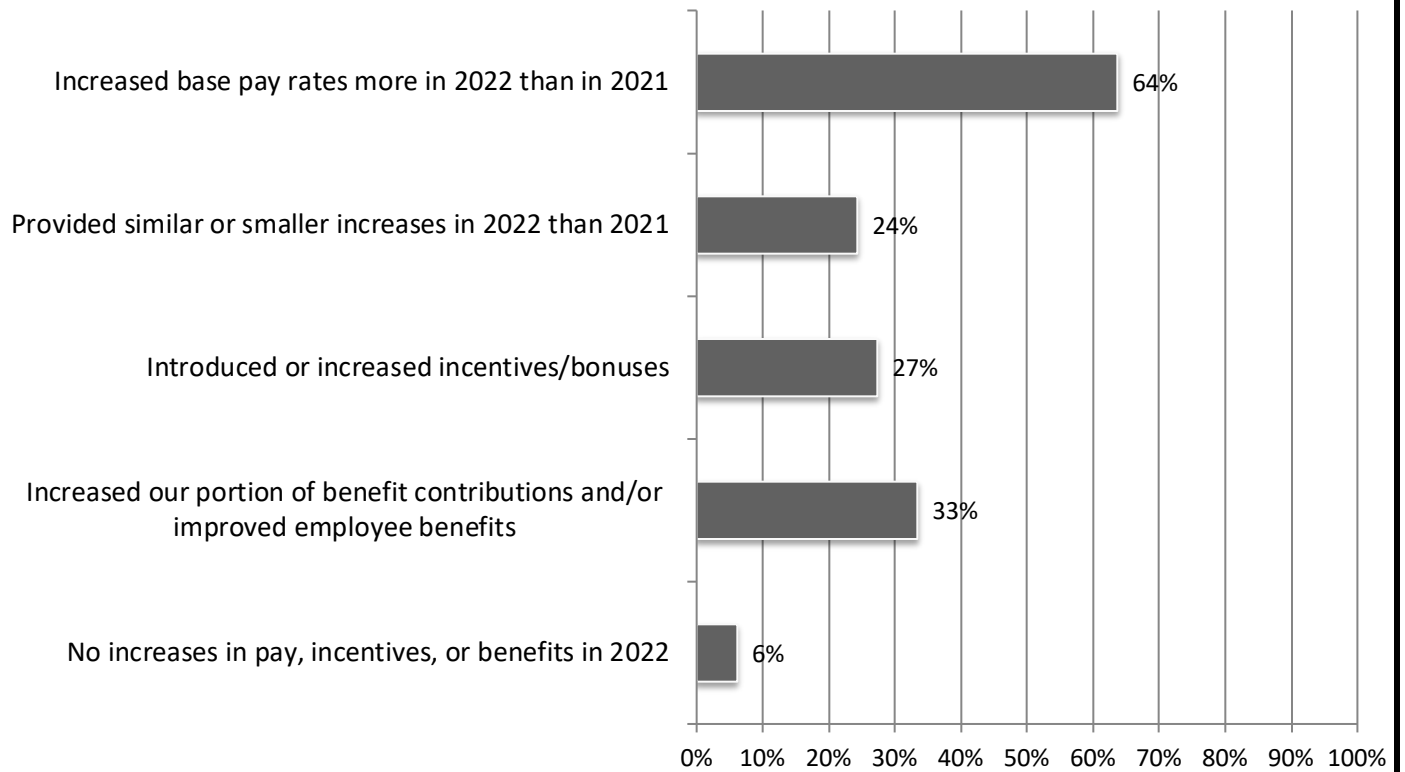
3. How would you describe your current situation in filling salaried and hourly craft positions? Responses: 32



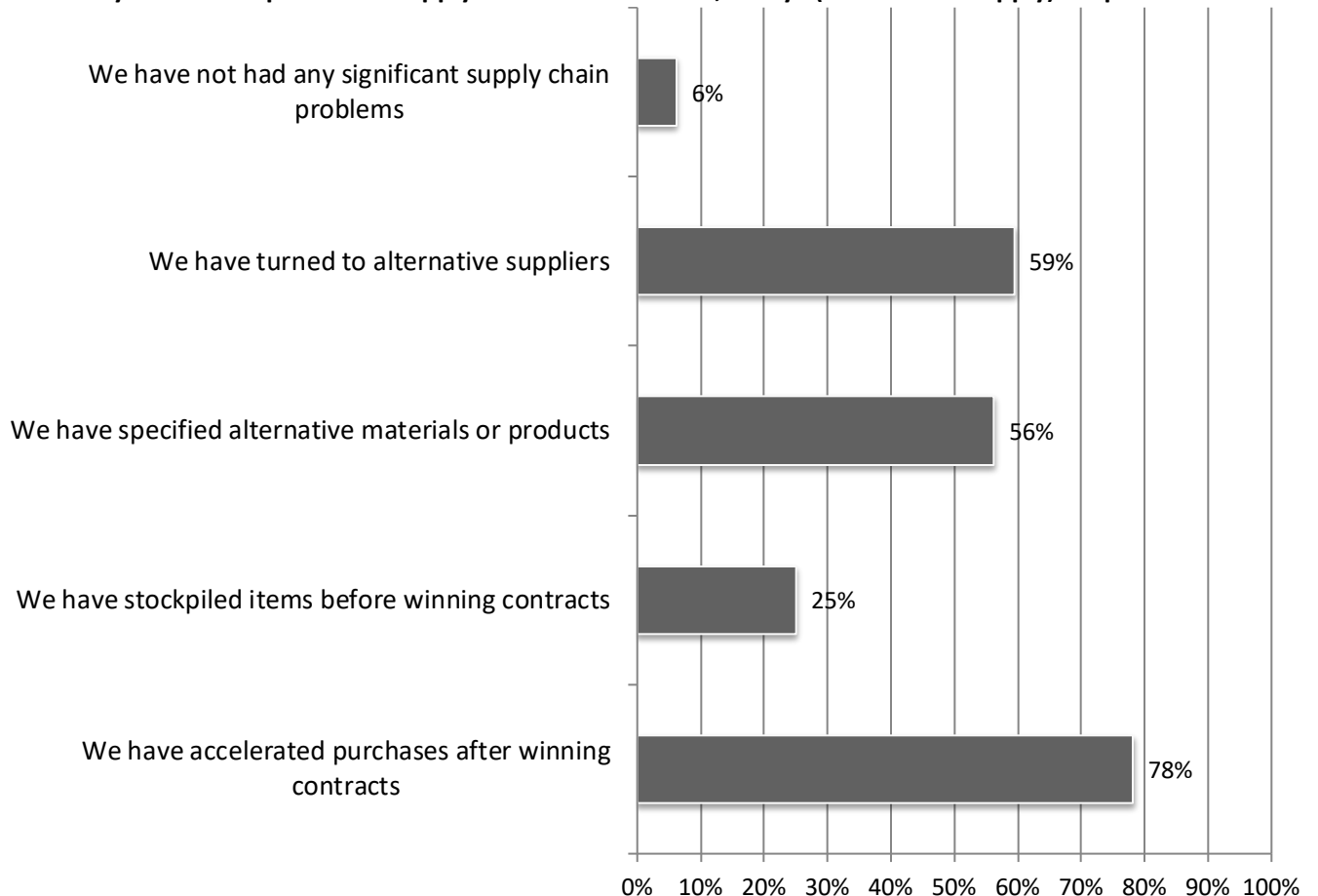
4. Do you expect any changes in the availability of hourly craft or salaried personnel over the coming 12 months? Responses: 33



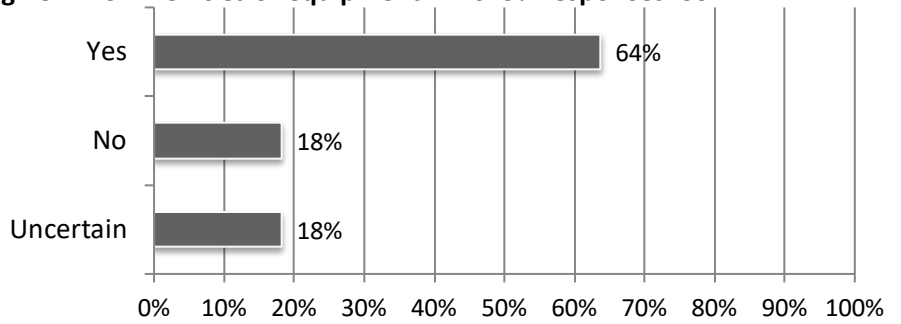
5. What changes did your firm make in pay or benefits in 2022? (mark all that apply) Responses: 33



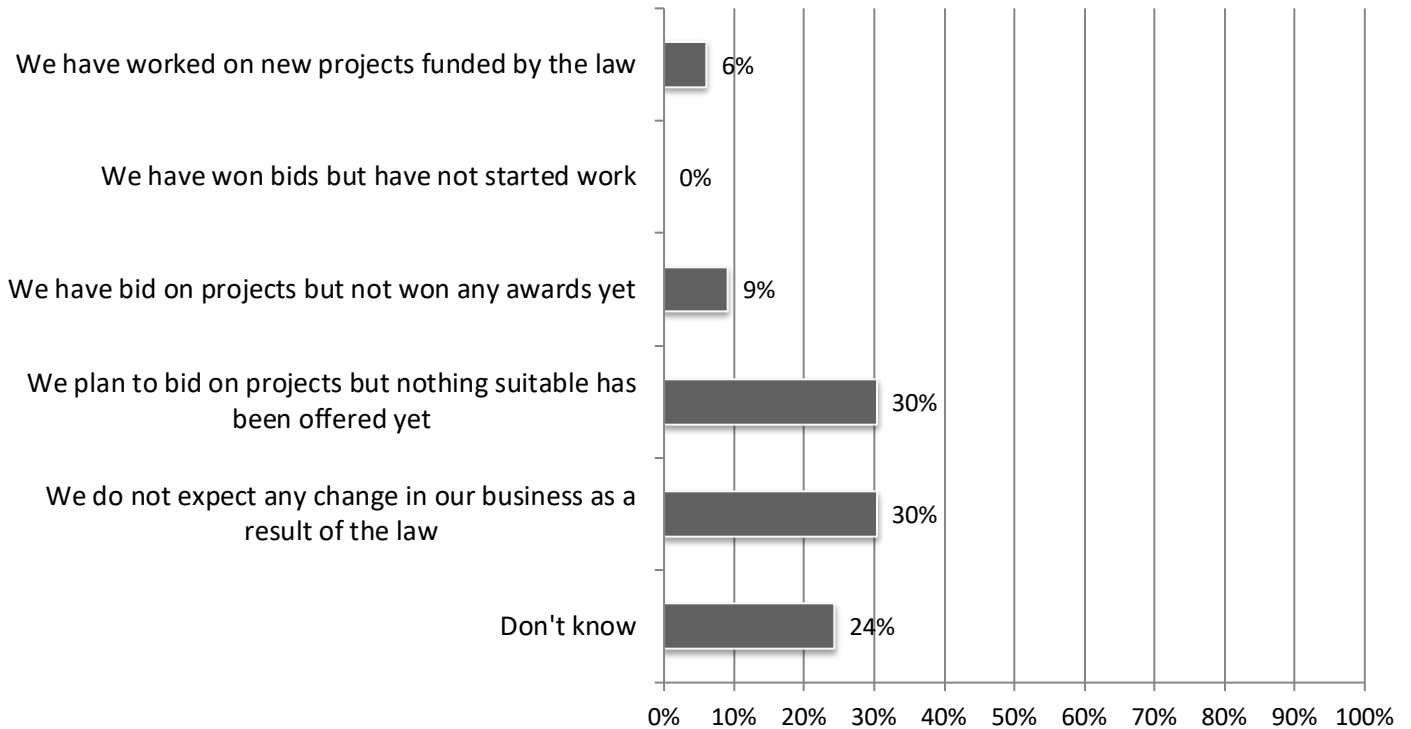
6. How has your firm responded to supply-chain issues in 2022, if any? (mark all that apply) Responses: 32



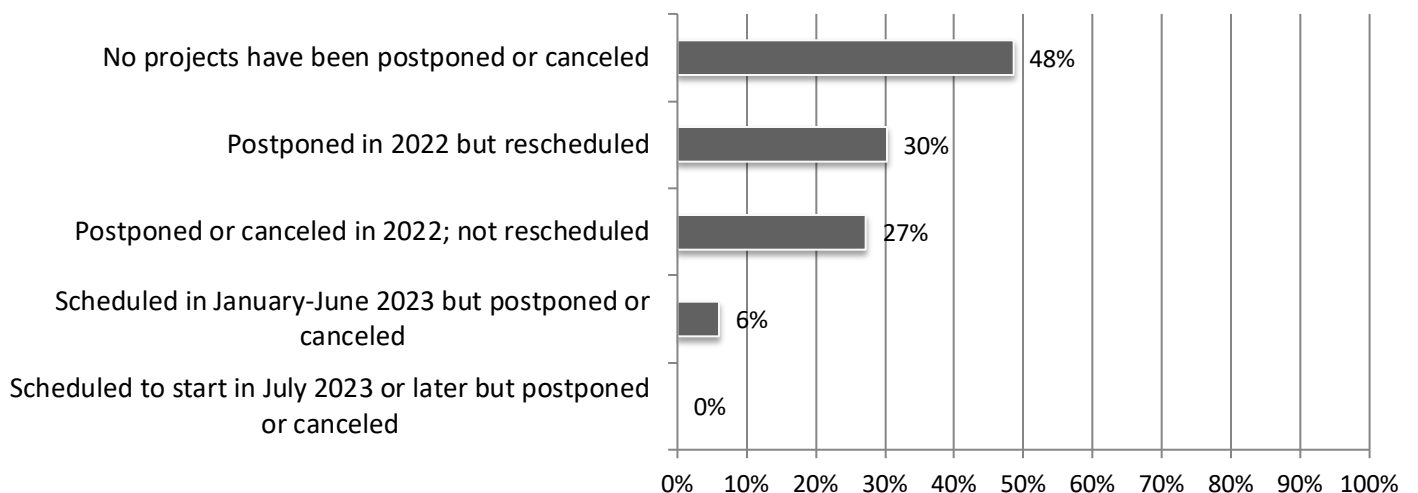
7. Do you anticipate purchasing/leasing new work vehicles or equipment in 2023? Responses: 33



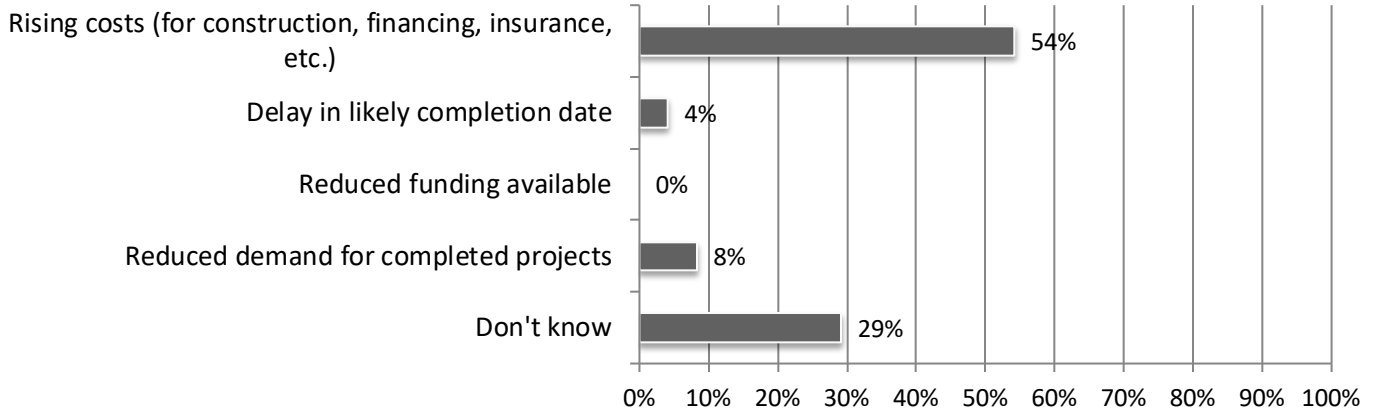
8. What difference, if any, has the Infrastructure Investment and Jobs Act of 2021 (the "Bipartisan Infrastructure Law") made to your business? Responses: 33



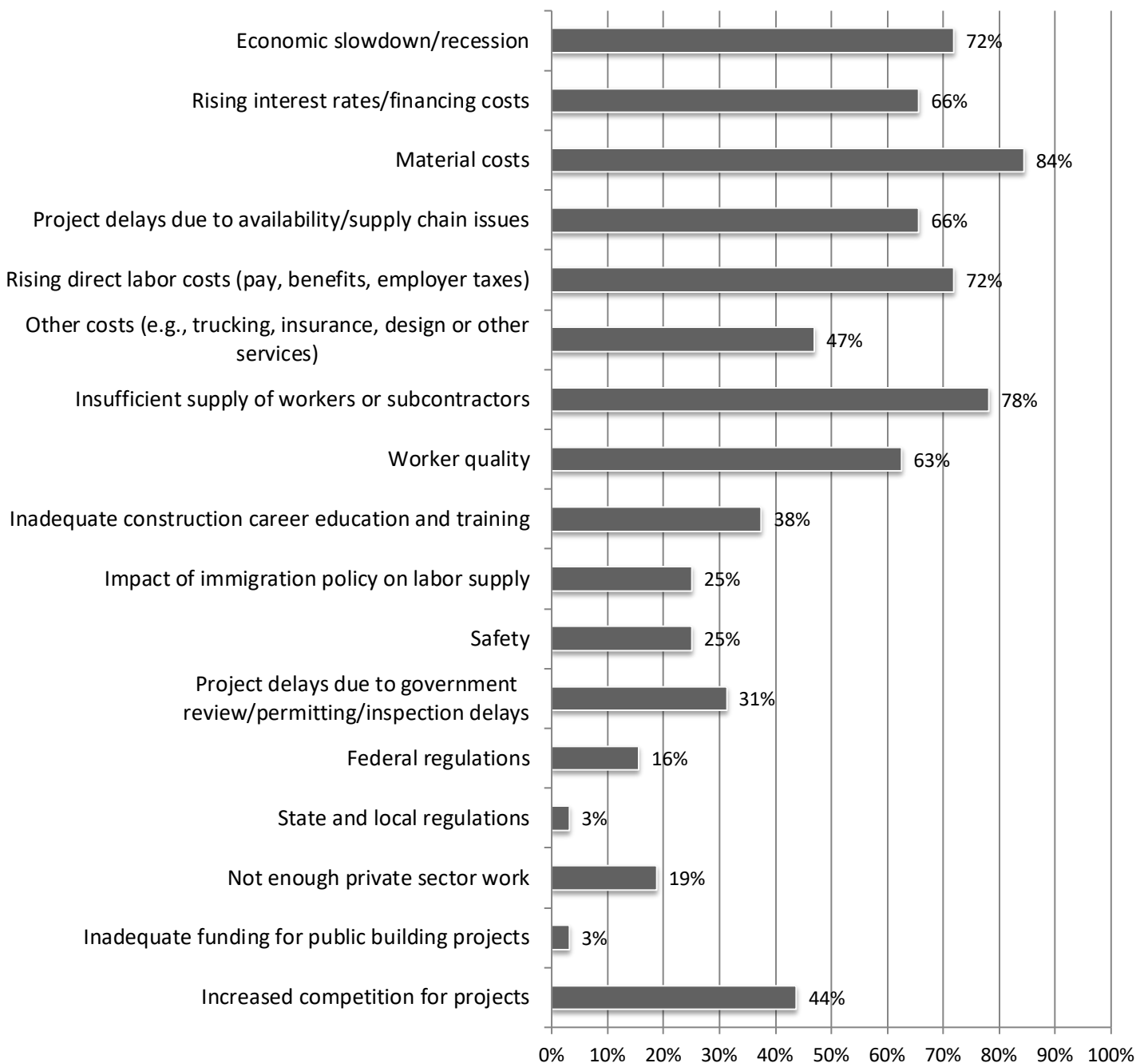
9. Did an owner postpone or cancel any projects that were scheduled to start in 2022 or 2023? (mark all that apply) Responses: 33



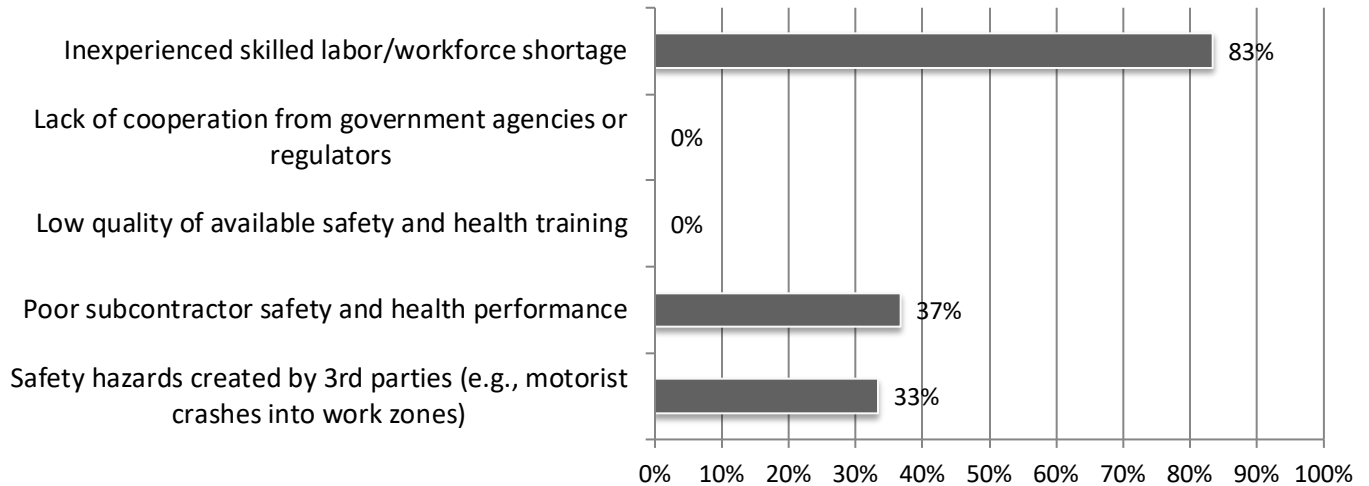
10. If projects were postponed or canceled, what was the main reason? Responses: 24



11. What are your biggest concerns for 2023? (mark all that apply) Responses: 32



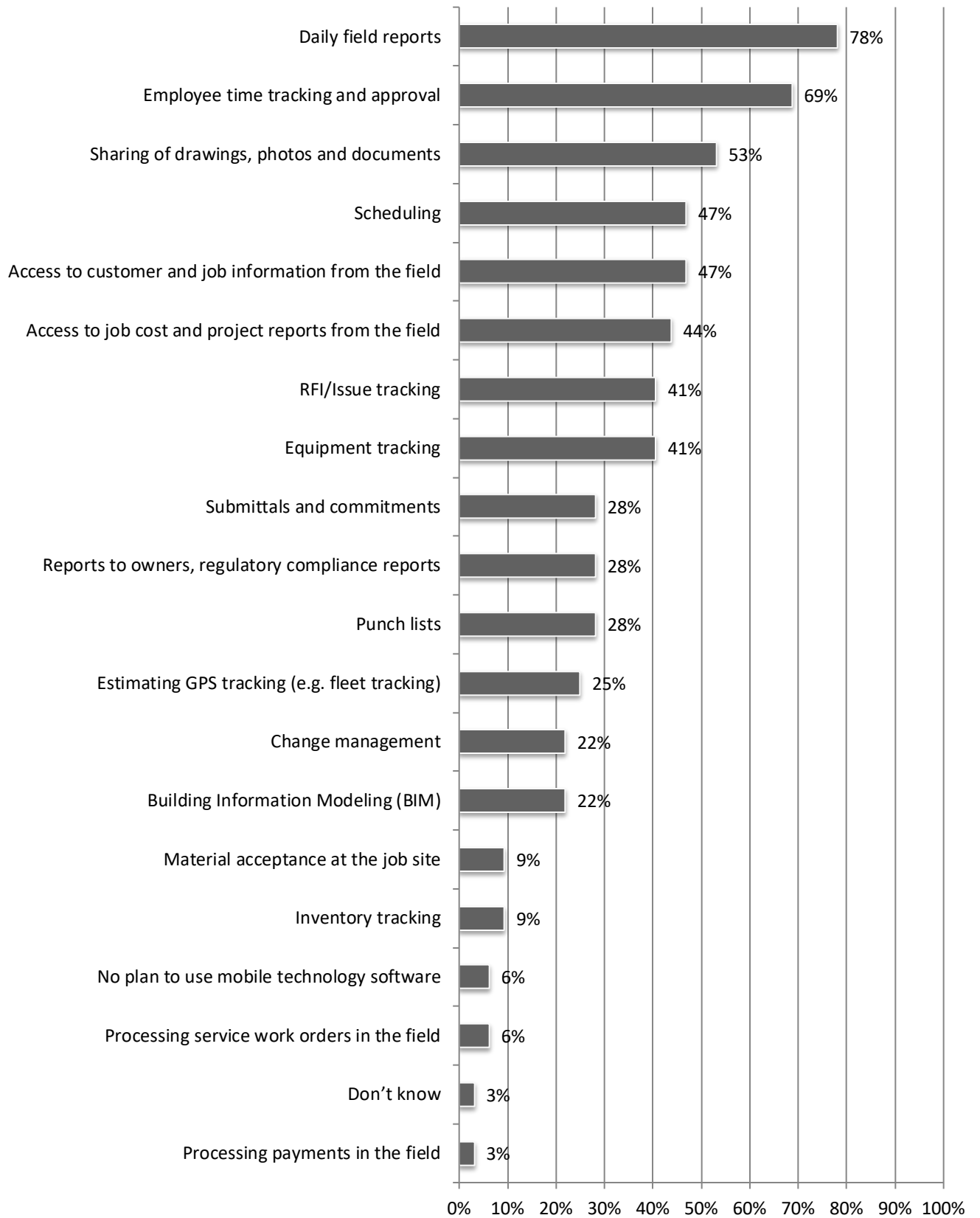
12. What challenges, if any, do you see regarding the safety and health of your firm's workers? (mark all that apply) Responses: 30



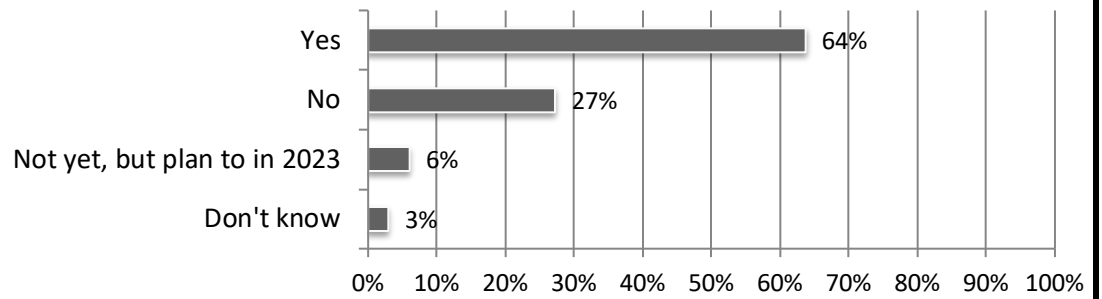
13. Compared to 2022, will your firm's 2023 investment in the following technologies change? (mark all that apply) Responses: 33

	Increase	Decrease	No change
Building Information Modeling (BIM)	36%	0%	64%
Human resources (HR) software	27%	0%	73%
Accounting software	21%	3%	76%
Document management software	20%	3%	77%
Project management software	19%	0%	81%
Estimating software	17%	0%	83%
Client relationship management (CRM) software	11%	0%	89%
Subcontractor bid management/ITB software	10%	0%	90%
Payroll software	10%	0%	90%
Project collaboration software	10%	0%	90%
Scheduling software	10%	0%	90%
Tool/asset management/tracking	10%	0%	90%
Fleet tracking/management software	7%	0%	93%
Prequalification software	7%	0%	93%
Service management software	4%	0%	96%

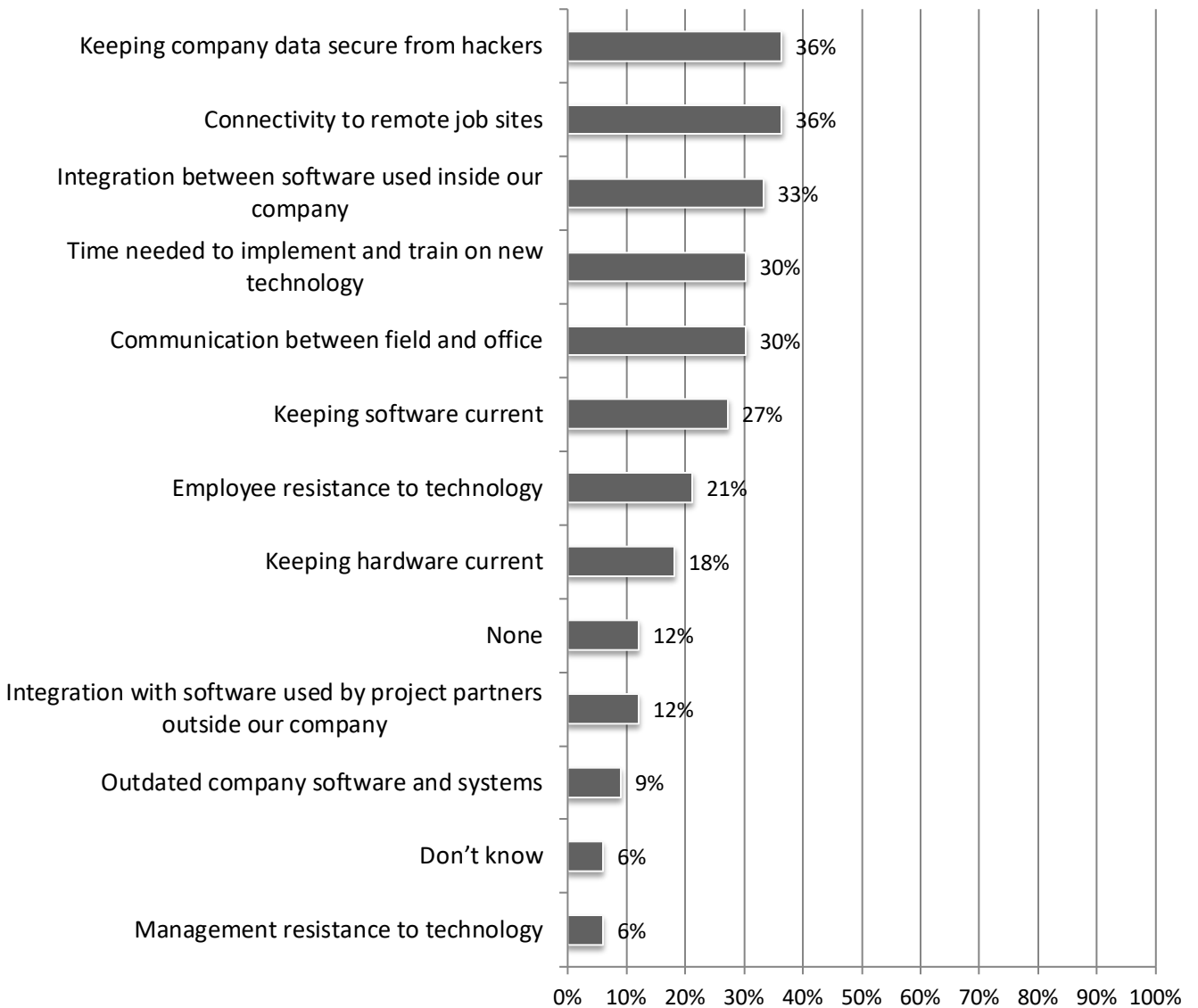
14. How does your company plan to use mobile software technology? (mark all that apply) Responses: 32



15. Does your firm currently have a formal IT plan to support your business objectives? Responses: 33

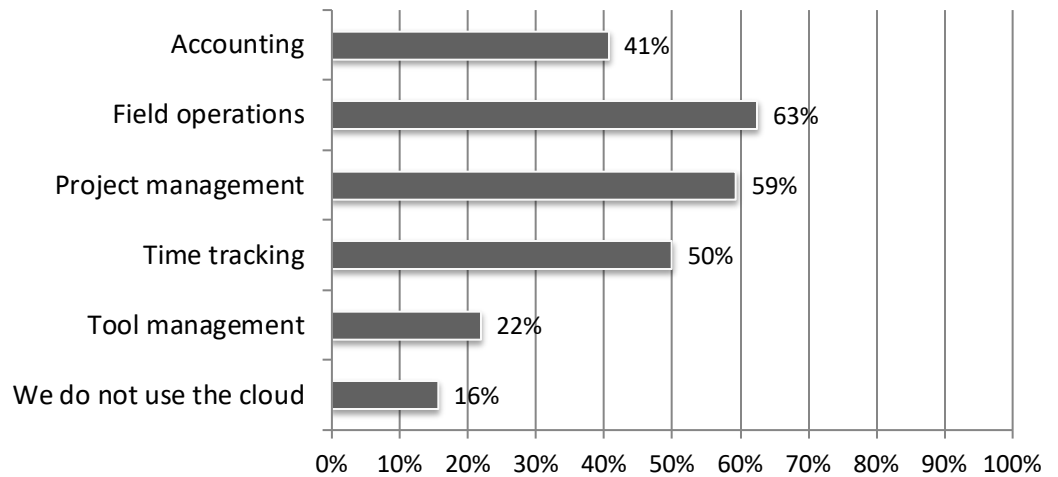


16. What are your biggest IT challenges? (mark all that apply) Responses: 33

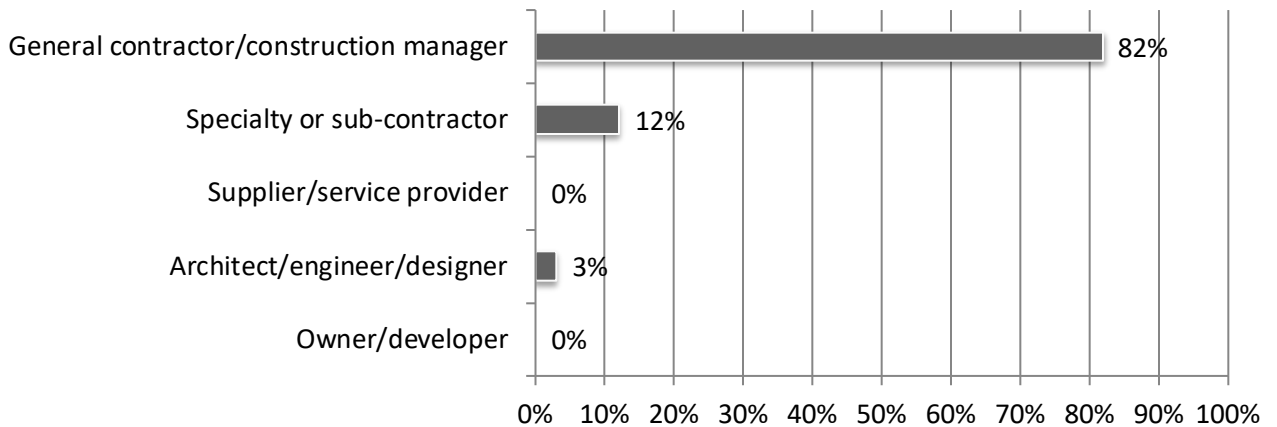


17. Does your firm use cloud-hosted technology in any of the following ways? (mark all that apply)

Responses: 32

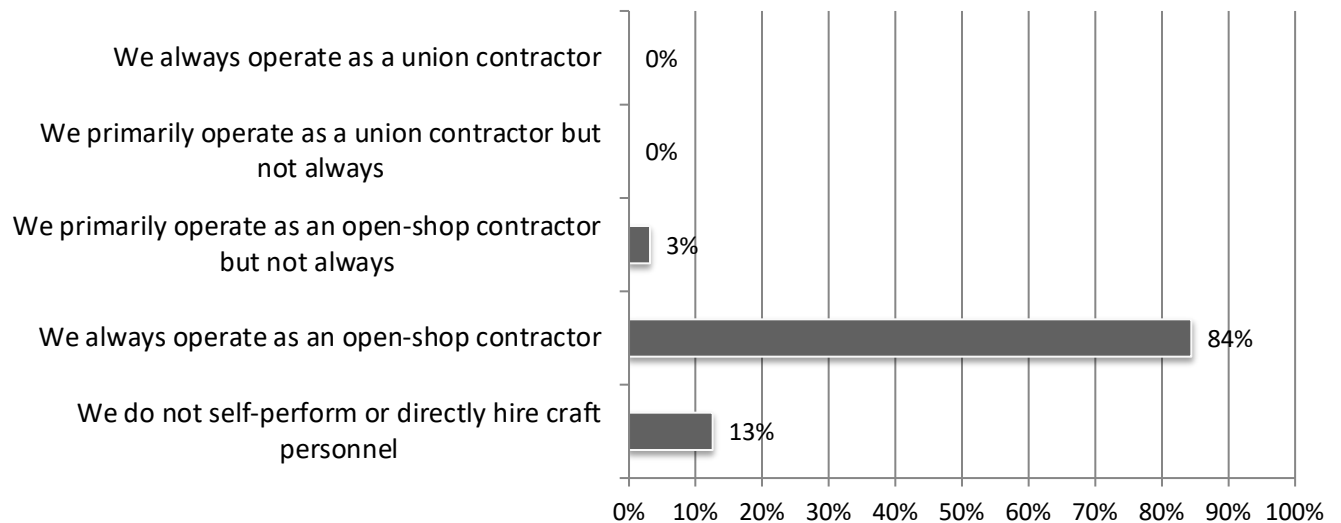


18. What best describes your firm? Responses: 33

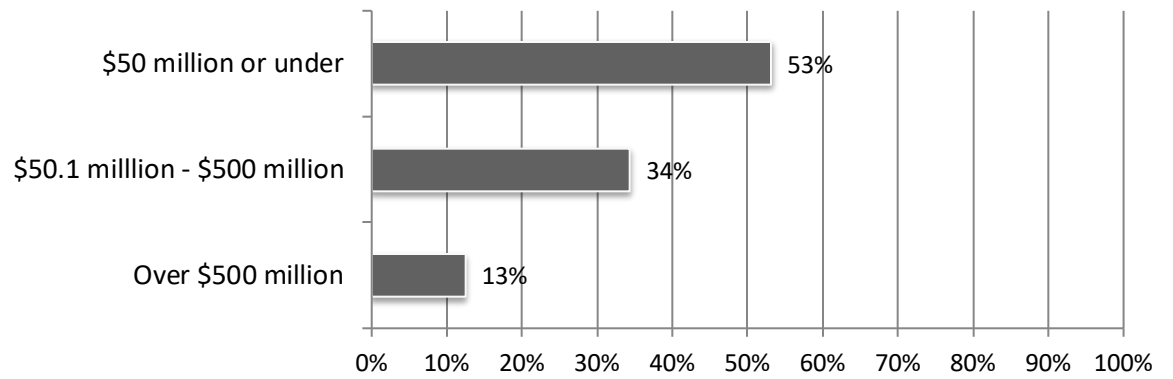


19. When you self-perform construction work, do you operate as a union contractor or an open-shop contractor?

Responses: 32



20. Estimate the total dollar amount of work your firm performed in 2022. Responses: 32



21. How many total employees does your firm employ at all of its locations? Responses: 33

