



AGC
THE CONSTRUCTION
ASSOCIATION

Sage

2023 Construction Outlook National Survey Results

Total Responses: 1,032. Responses varied for some questions. Percentages are based on responses to each question and may not sum to 100 due to rounding.

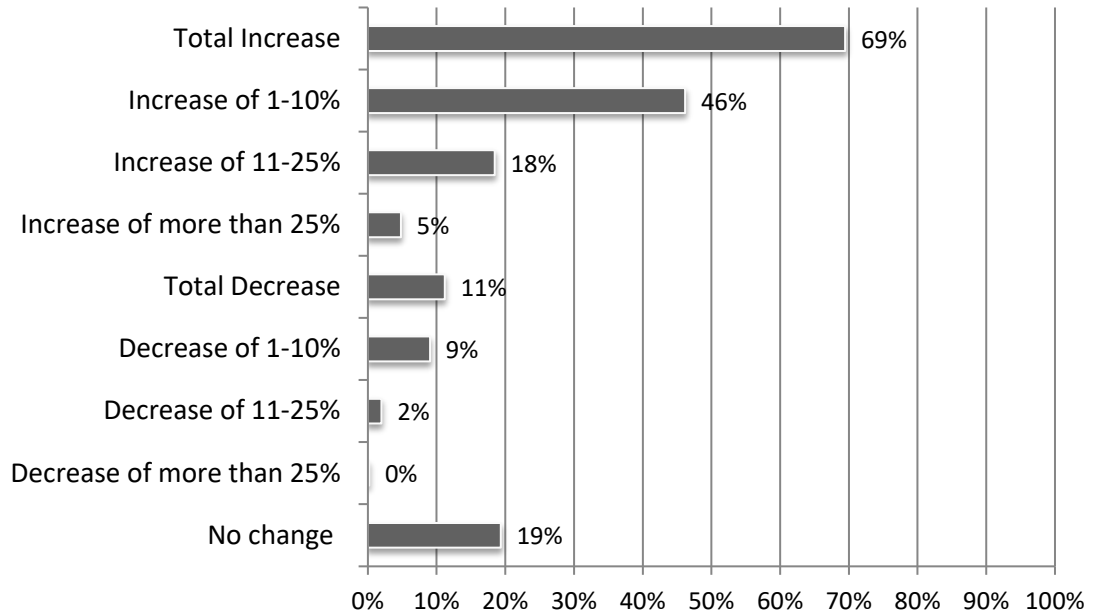
1. Compared to 2022, do you expect the available dollar value of projects you compete for in 2023 to be higher/lower/about the same (answer for all market areas in which your business operates):

Responses: 1,021

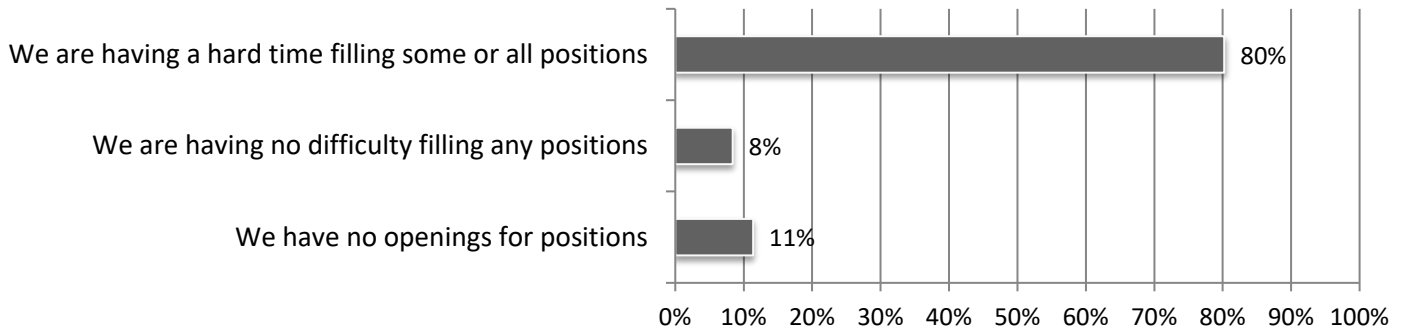
Market	Higher	Lower	Same	Net*	2022 Net
Bridge/Highway	50%	9%	41%	42%	57%
Transportation (e.g., transit, rail, airport)	52%	11%	37%	42%	51%
Water/Sewer	48%	11%	41%	38%	50%
Federal (e.g., VA, GSA, USACE, NAVFAC)	49%	11%	40%	37%	37%
Other Healthcare	42%	14%	43%	28%	41%
Power	41%	14%	45%	28%	35%
Hospital	40%	16%	44%	23%	38%
Public Building	39%	16%	44%	23%	20%
K-12 School	37%	20%	43%	16%	19%
Higher Education	36%	20%	44%	16%	16%
Manufacturing	39%	25%	37%	14%	27%
Data Center	35%	22%	43%	12%	-
Warehouse	36%	26%	38%	10%	41%
Other	26%	16%	59%	10%	-
Multifamily Residential	35%	34%	32%	1%	32%
Lodging	28%	32%	39%	-4%	6%
Private Office	22%	43%	35%	-21%	-8%
Retail	22%	44%	34%	-22%	-8%

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

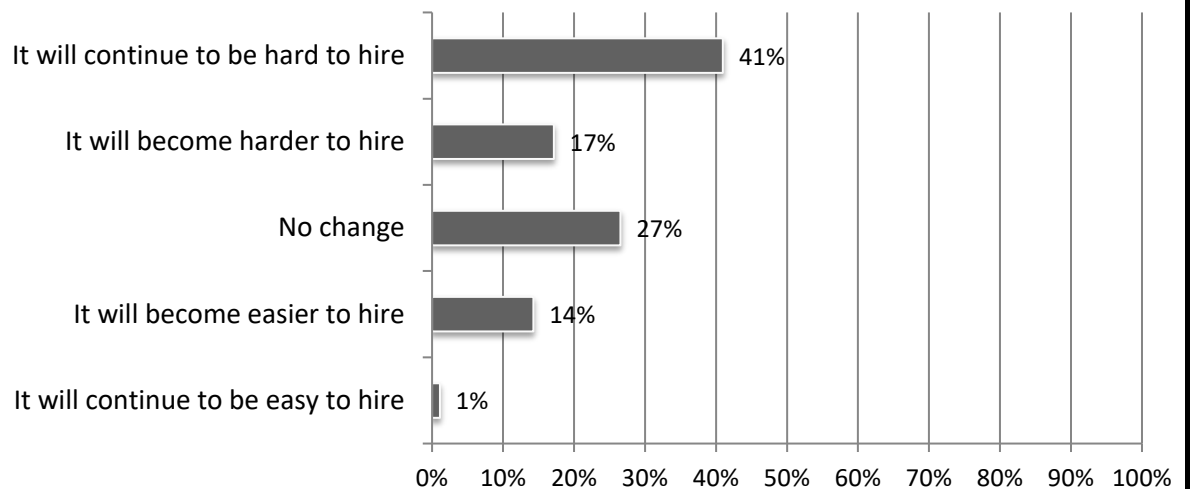
2. What percent change do you expect in your headcount in 2023? Responses: 1,018



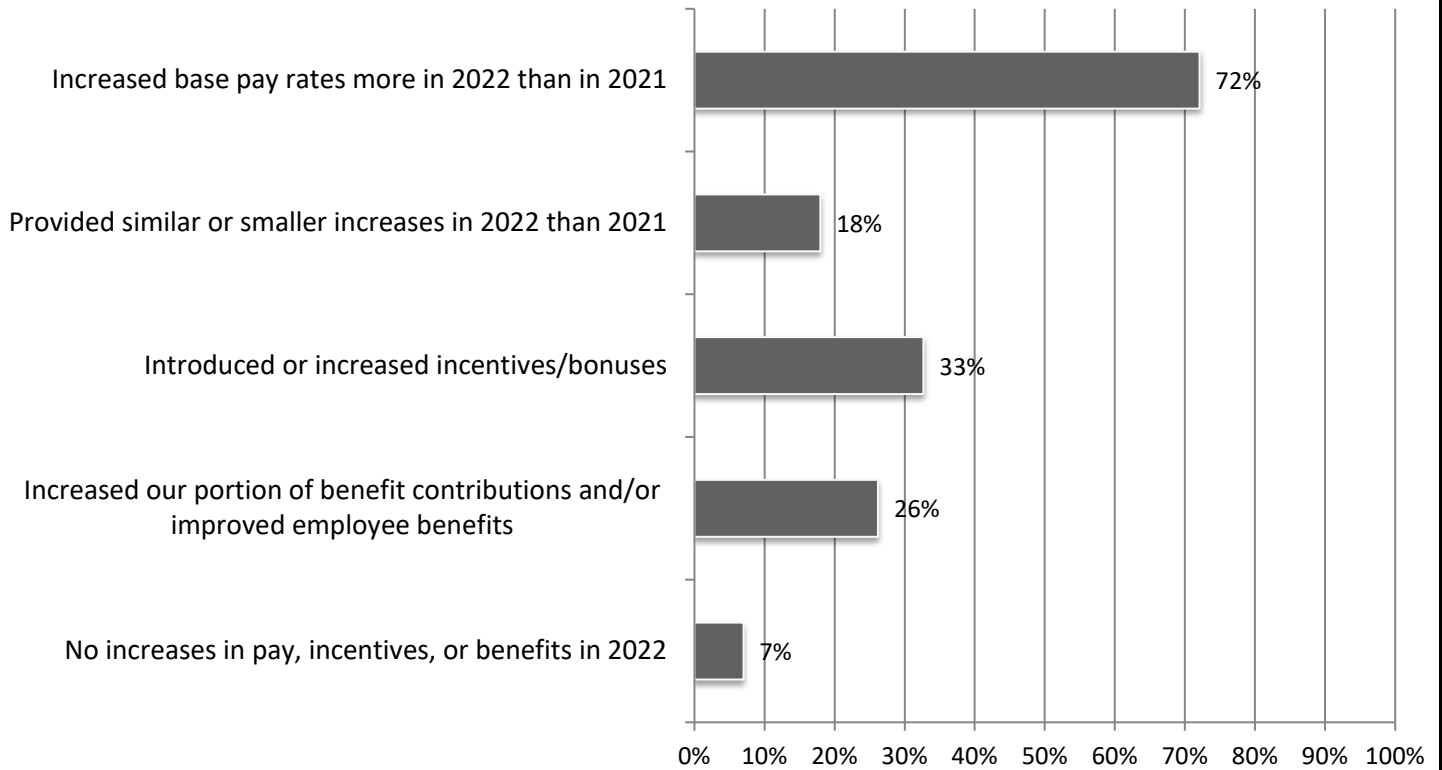
3. How would you describe your current situation in filling salaried and hourly craft positions? Responses: 1,012



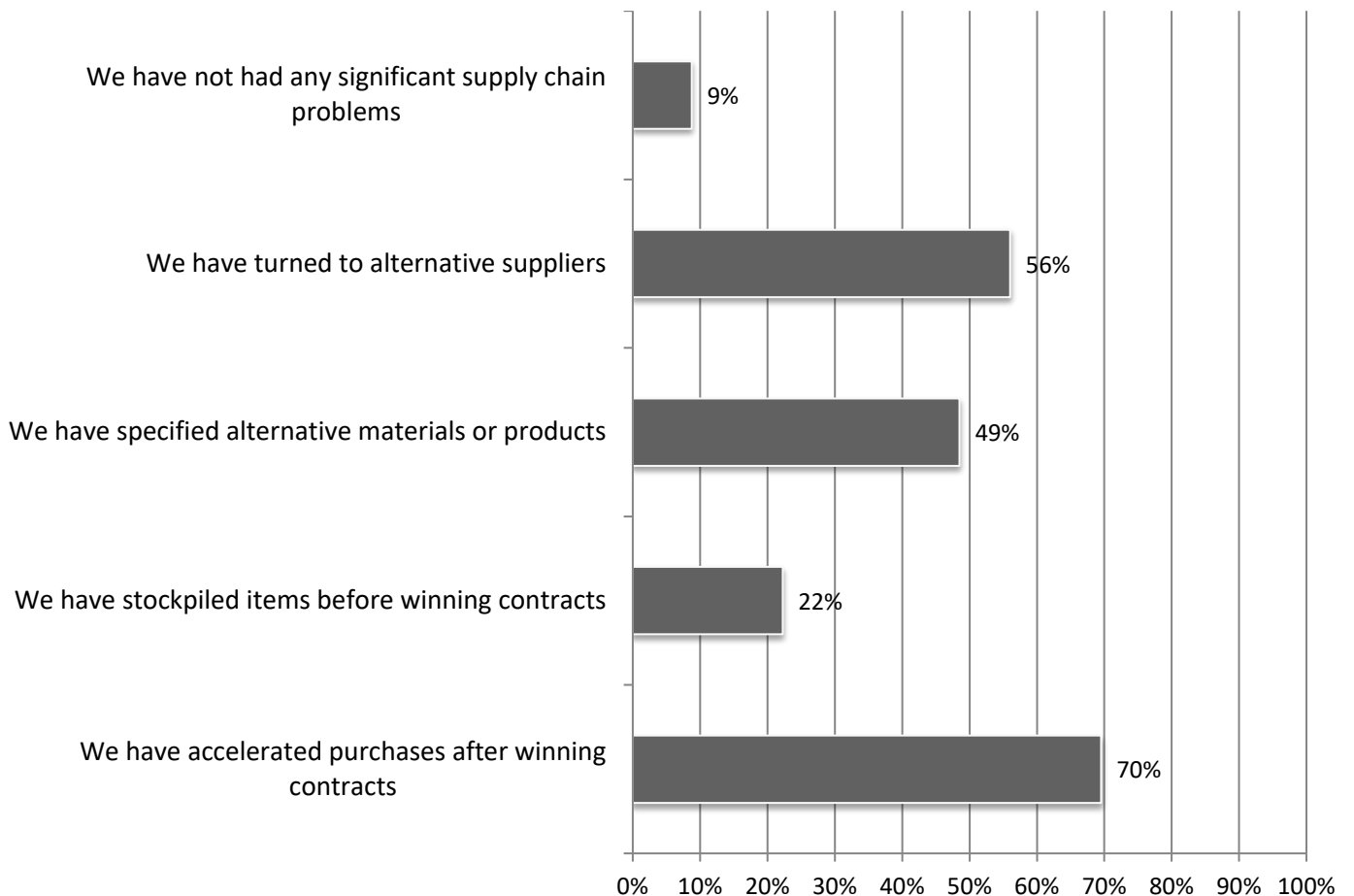
4. Do you expect any changes in the availability of hourly craft or salaried personnel over the coming 12 months? Responses: 1,003



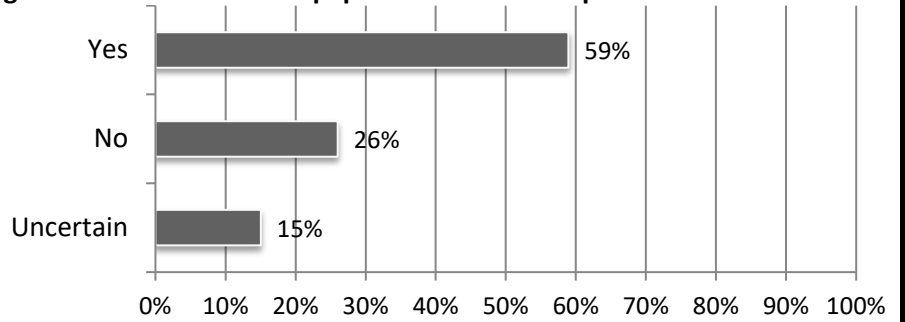
5. What changes did your firm make in pay or benefits in 2022? (mark all that apply) Responses: 985



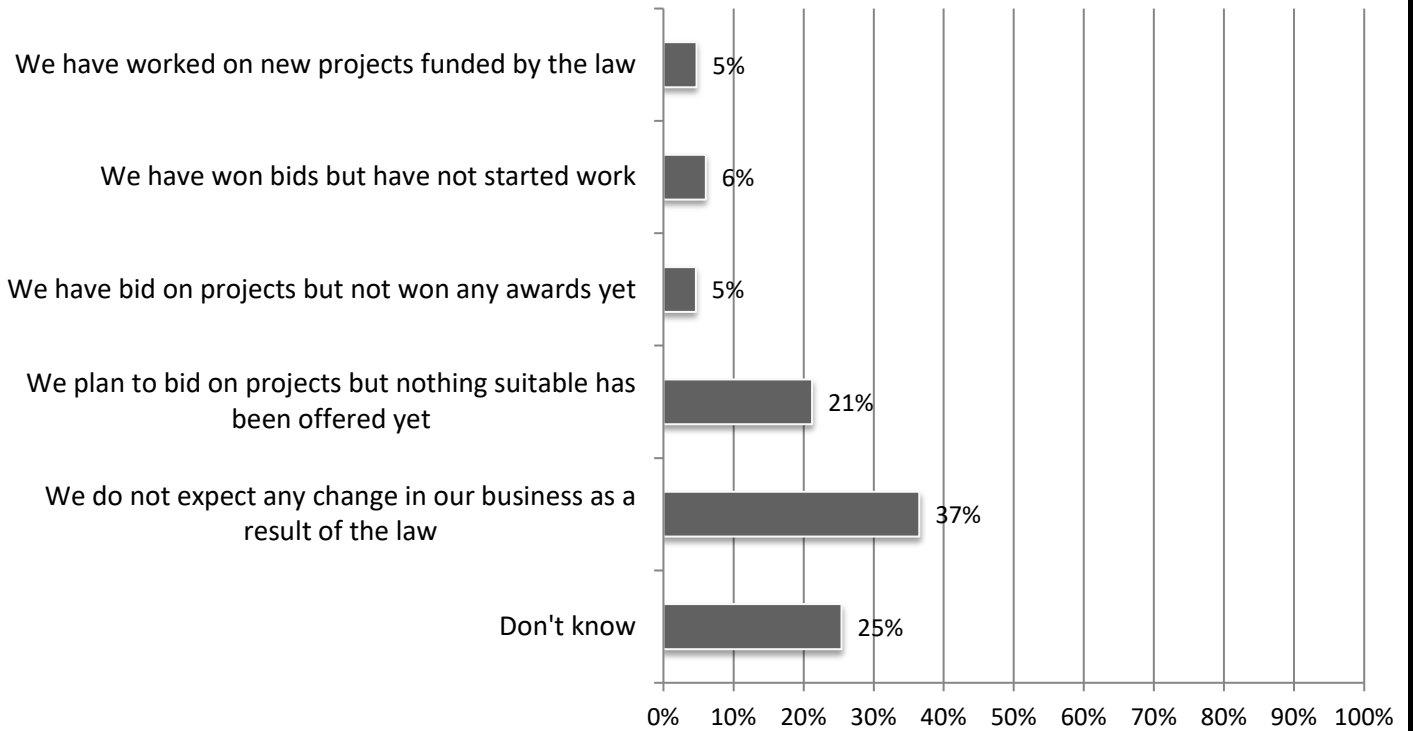
6. How has your firm responded to supply-chain issues in 2022, if any? (mark all that apply) Responses: 971



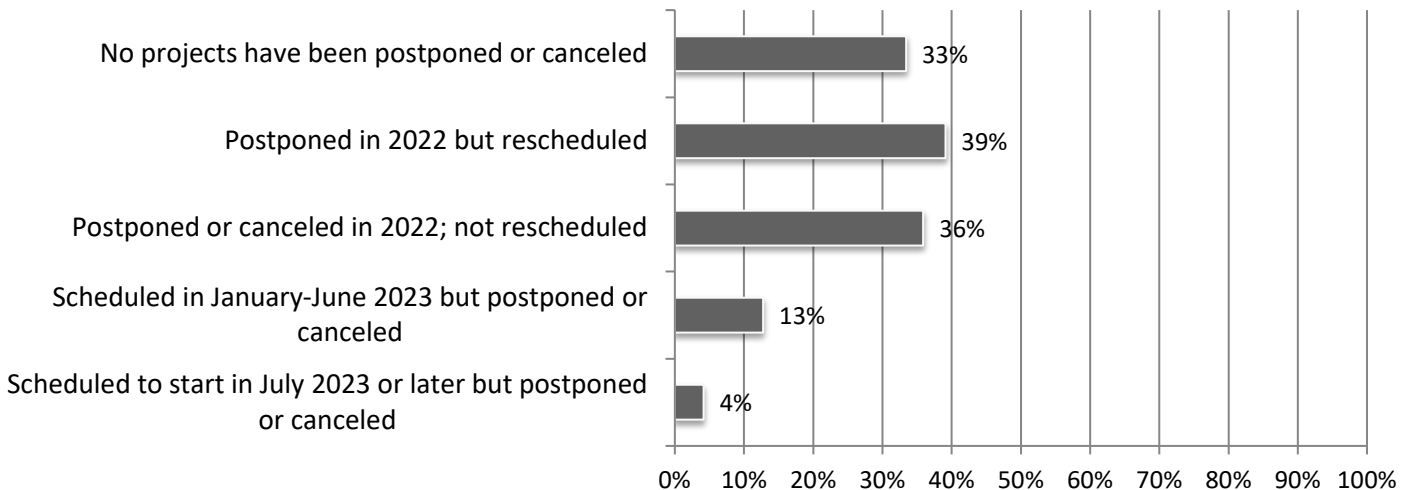
7. Do you anticipate purchasing/leasing new work vehicles or equipment in 2023? Responses: 984



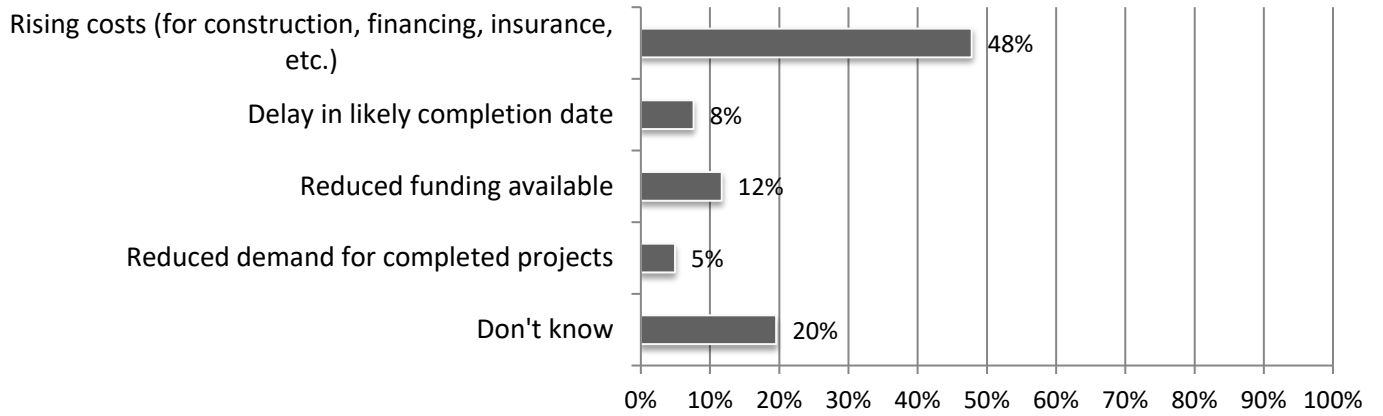
8. What difference, if any, has the Infrastructure Investment and Jobs Act of 2021 (the "Bipartisan Infrastructure Law") made to your business? Responses: 972



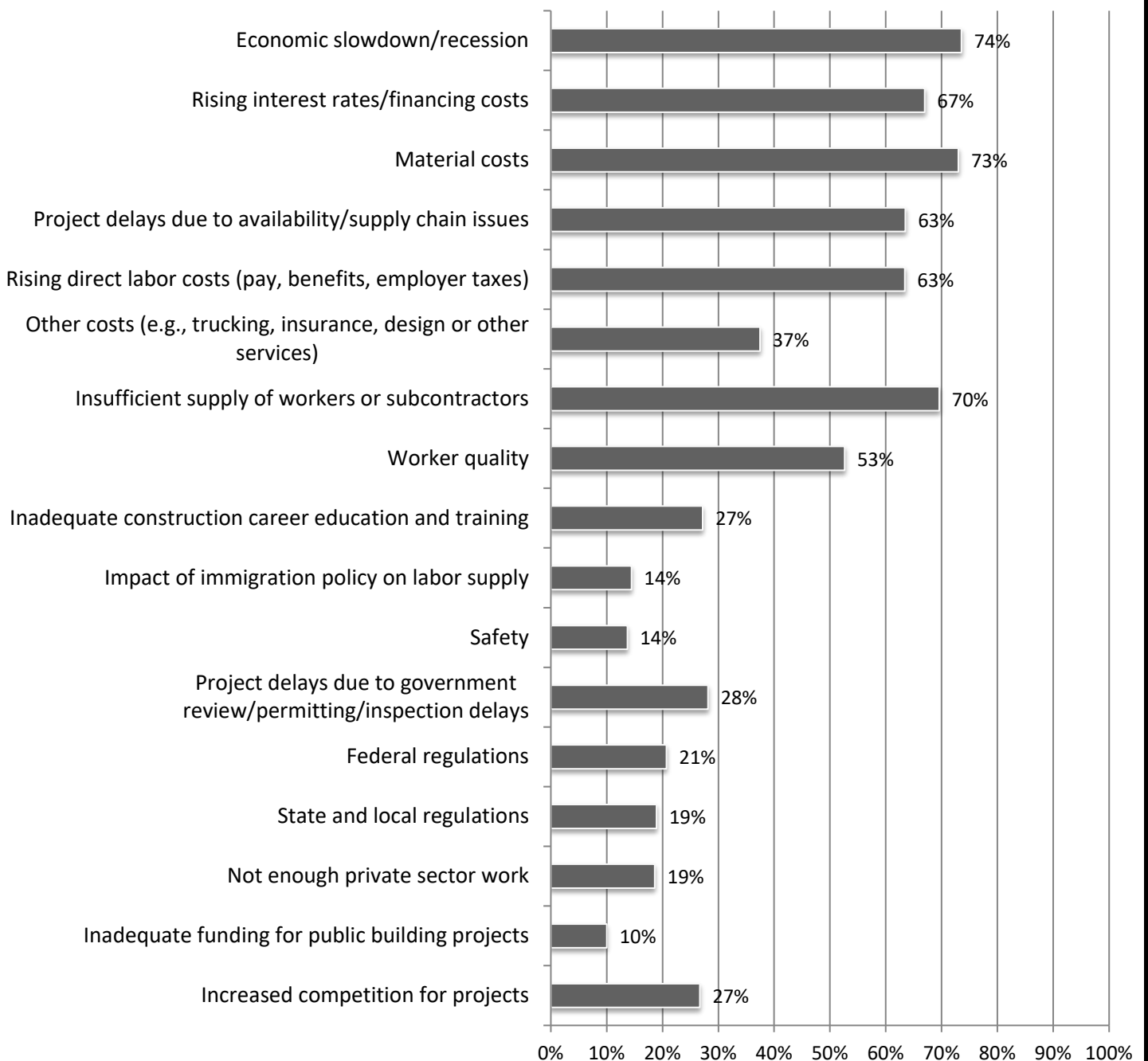
9. Did an owner postpone or cancel any projects that were scheduled to start in 2022 or 2023? (mark all that apply) Responses: 964



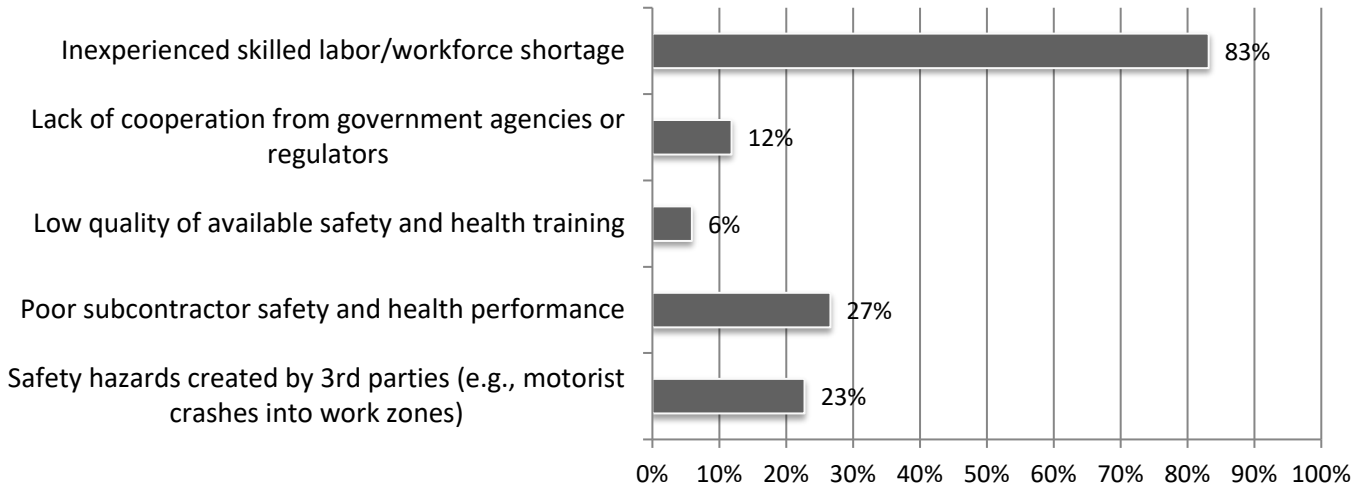
10. If projects were postponed or canceled, what was the main reason? Responses: 787



11. What are your biggest concerns for 2023? (mark all that apply) Responses: 956



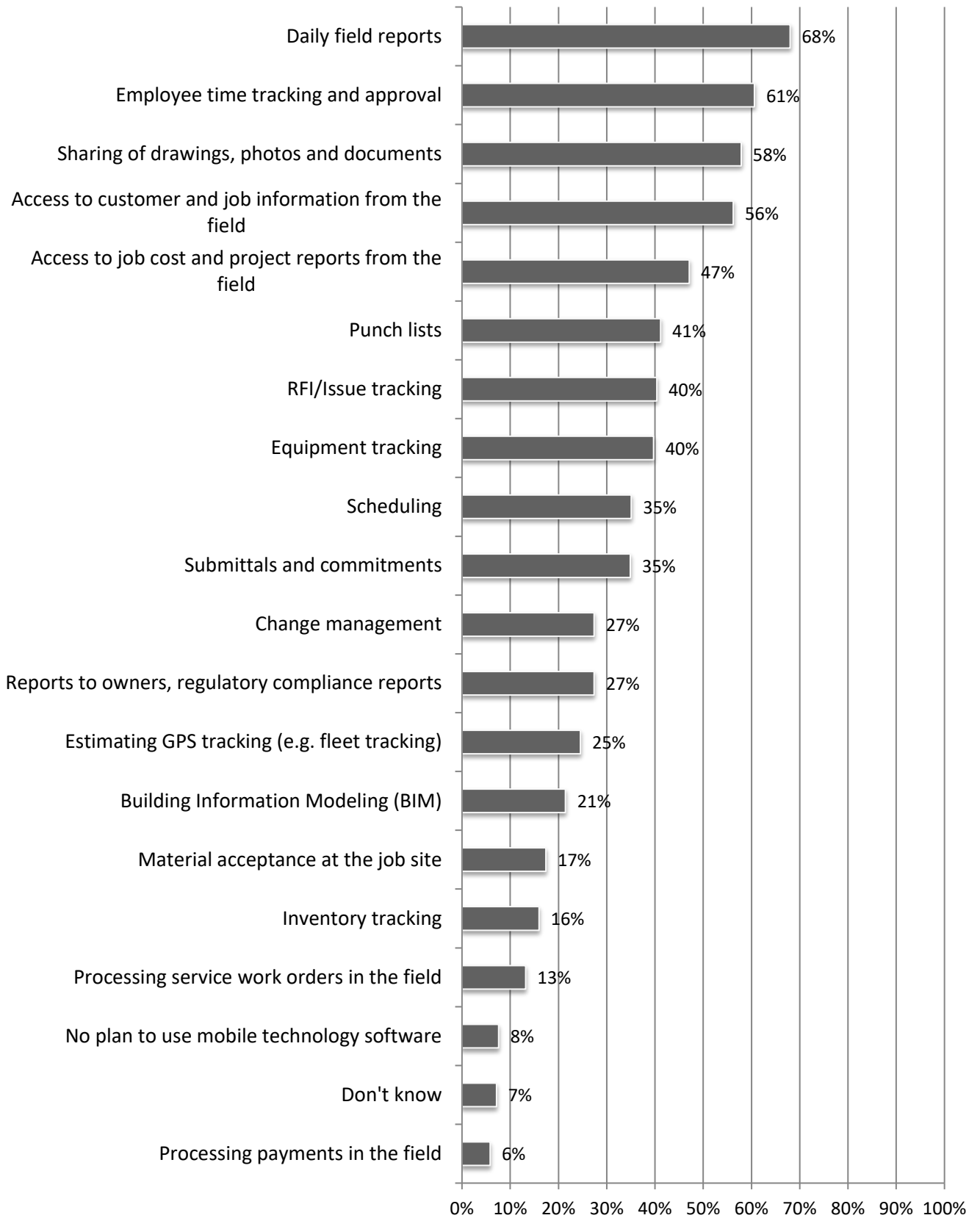
12. What challenges, if any, do you see regarding the safety and health of your firm's workers? (mark all that apply) Responses: 861



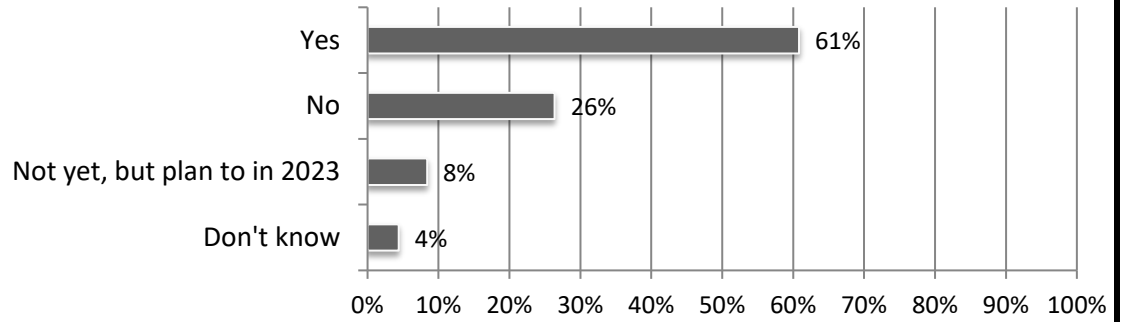
13. Compared to 2022, will your firm's 2023 investment in the following technologies change? (mark all that apply) Responses: 925

	Increase	Decrease	No change
Document management software	31%	1%	68%
Project management software	30%	2%	68%
Accounting software	25%	2%	73%
Estimating software	24%	1%	75%
Tool/asset management/tracking	24%	2%	75%
Human resources (HR) software	24%	1%	75%
Fleet tracking/management software	21%	2%	77%
Building Information Modeling (BIM)	21%	1%	78%
Scheduling software	19%	1%	80%
Client relationship management (CRM) software	19%	2%	80%
Payroll software	18%	2%	80%
Project collaboration software	17%	2%	81%
Subcontractor bid management/ITB software	10%	2%	88%
Prequalification software	9%	1%	90%
Service management software	7%	2%	91%

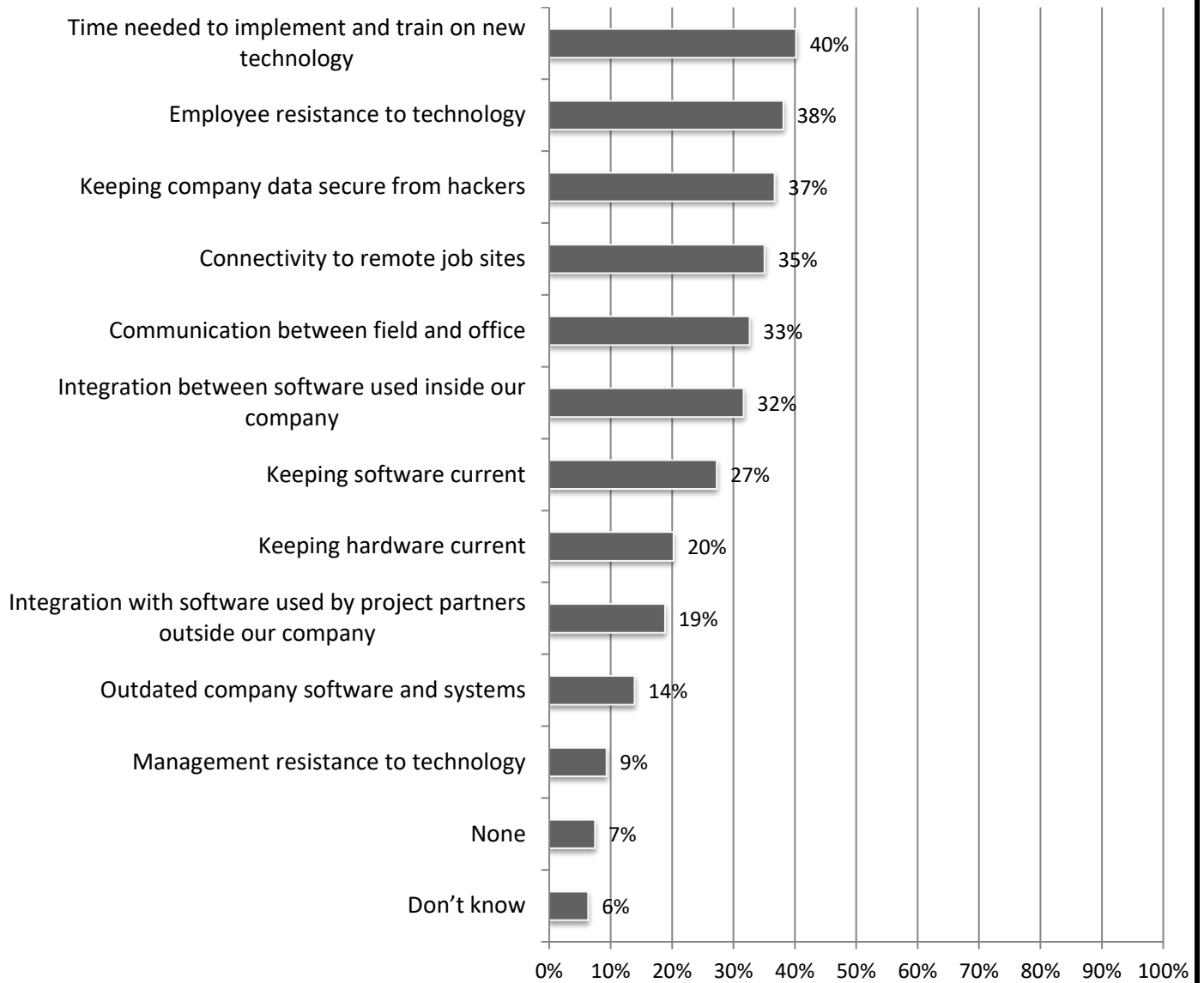
14. How does your company plan to use mobile software technology? (mark all that apply) Responses: 909



15. Does your firm currently have a formal IT plan to support your business objectives? Responses: 929

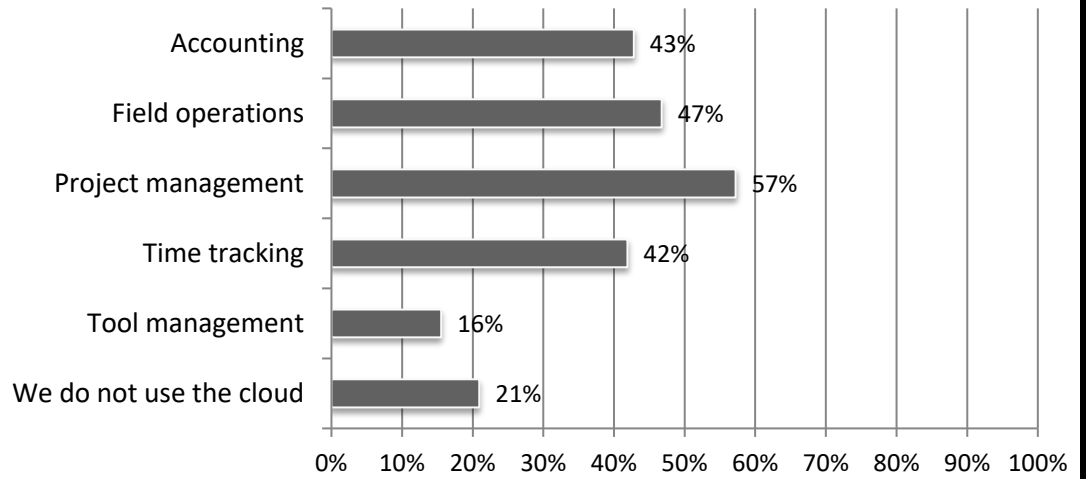


16. What are your biggest IT challenges (mark all that apply)? Responses: 913

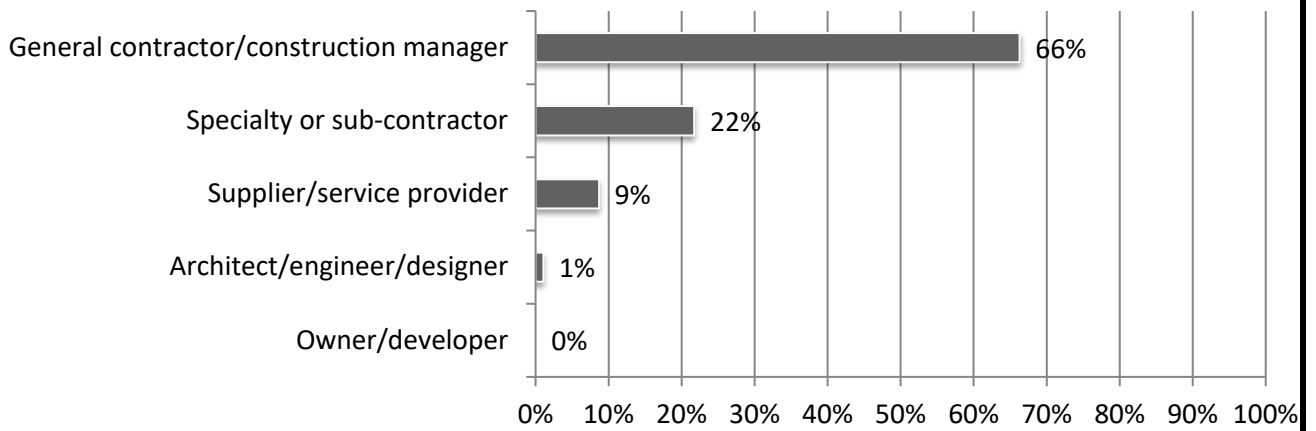


17. Does your firm use cloud-hosted technology in any of the following ways (mark all that apply)?

Responses: 888

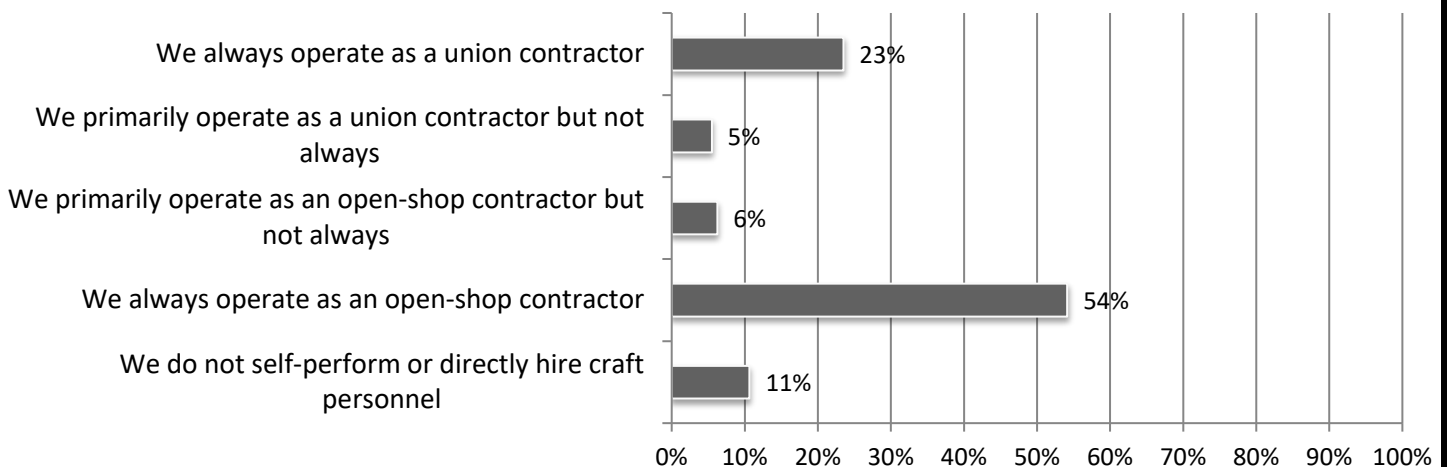


18. What best describes your firm? Responses: 920

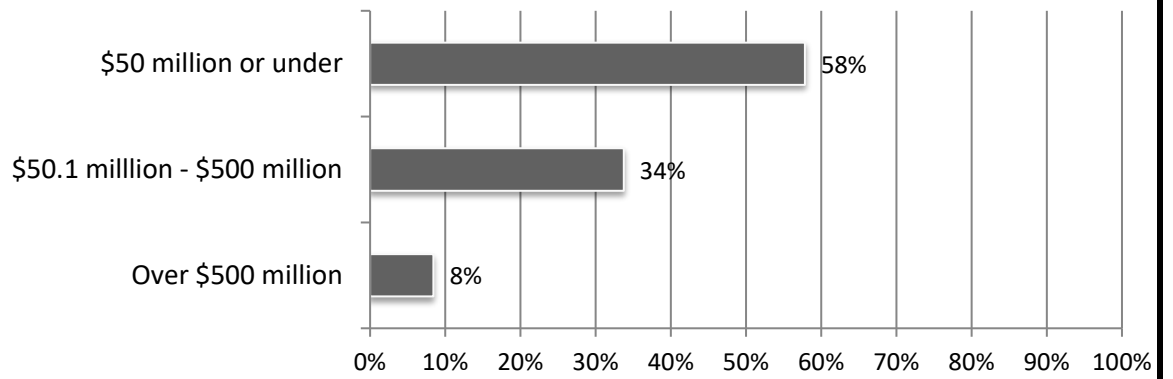


19. When you self-perform construction work, do you operate as a union contractor or an open-shop contractor?

Responses: 911



20. Estimate the total dollar amount of work your firm performed in 2022. Responses: 913



21. How many total employees does your firm employ at all of its locations? Responses: 915

