



AGC
THE CONSTRUCTION
ASSOCIATION

Sage

2023 Construction Outlook Open Shop Survey Results

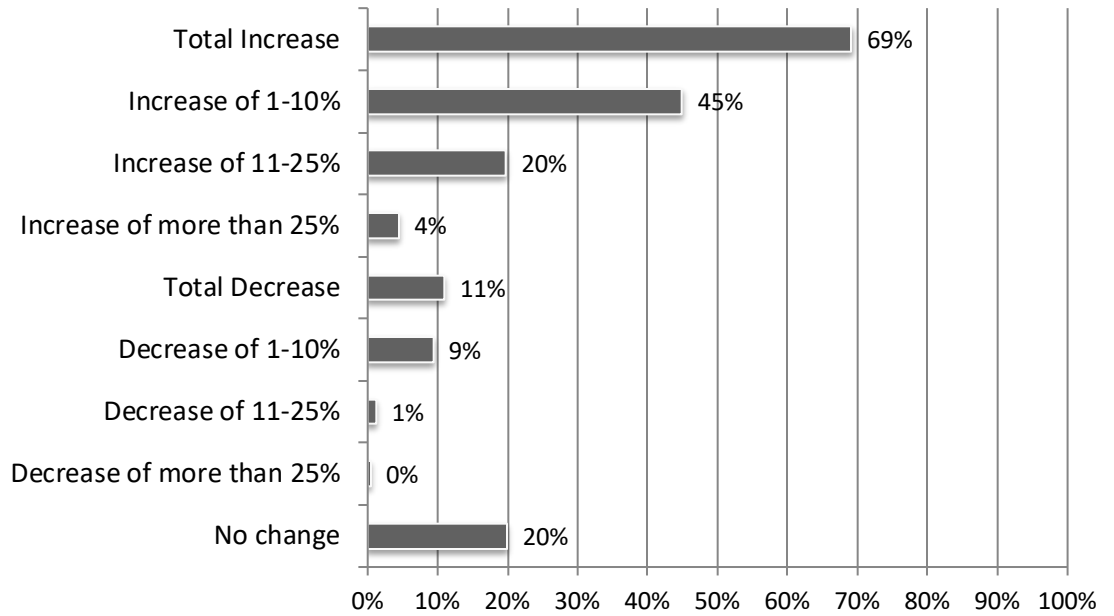
Total Responses: 493. Responses varied for some questions. Percentages are based on responses to each question and may not sum to 100 due to rounding.

- 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: 489

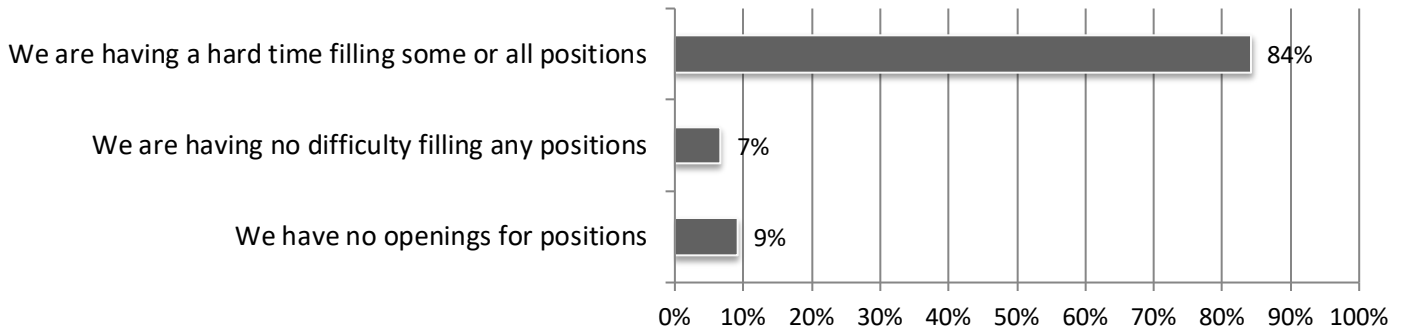
Market	Higher	Lower	Same	Net*	US Net
Bridge/Highway	48%	8%	45%	40%	42%
Transportation (e.g., transit, rail, airport)	49%	11%	40%	39%	42%
Water/Sewer	48%	10%	43%	38%	38%
Federal (e.g., VA, GSA, USACE, NAVFAC)	47%	12%	41%	34%	37%
Public Building	42%	14%	44%	28%	23%
Power	37%	14%	49%	24%	28%
Other Healthcare	37%	15%	48%	23%	28%
Hospital	35%	15%	50%	20%	23%
K-12 School	36%	20%	44%	16%	16%
Higher Education	32%	21%	47%	12%	16%
Warehouse	35%	24%	41%	12%	10%
Data Center	32%	23%	45%	9%	12%
Manufacturing	35%	26%	39%	8%	14%
Other	23%	18%	58%	5%	10%
Multifamily Residential	36%	32%	32%	4%	1%
Lodging	27%	35%	38%	-8%	-4%
Private Office	23%	42%	35%	-19%	-21%
Retail	23%	44%	33%	-22%	-22%

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

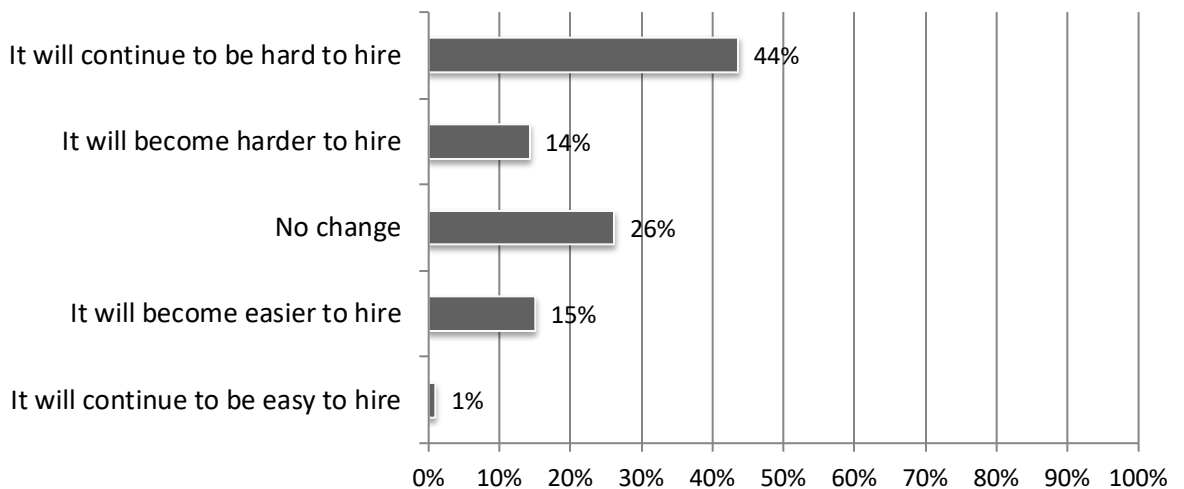
2. What percent change do you expect in your headcount in 2023? Responses: 492



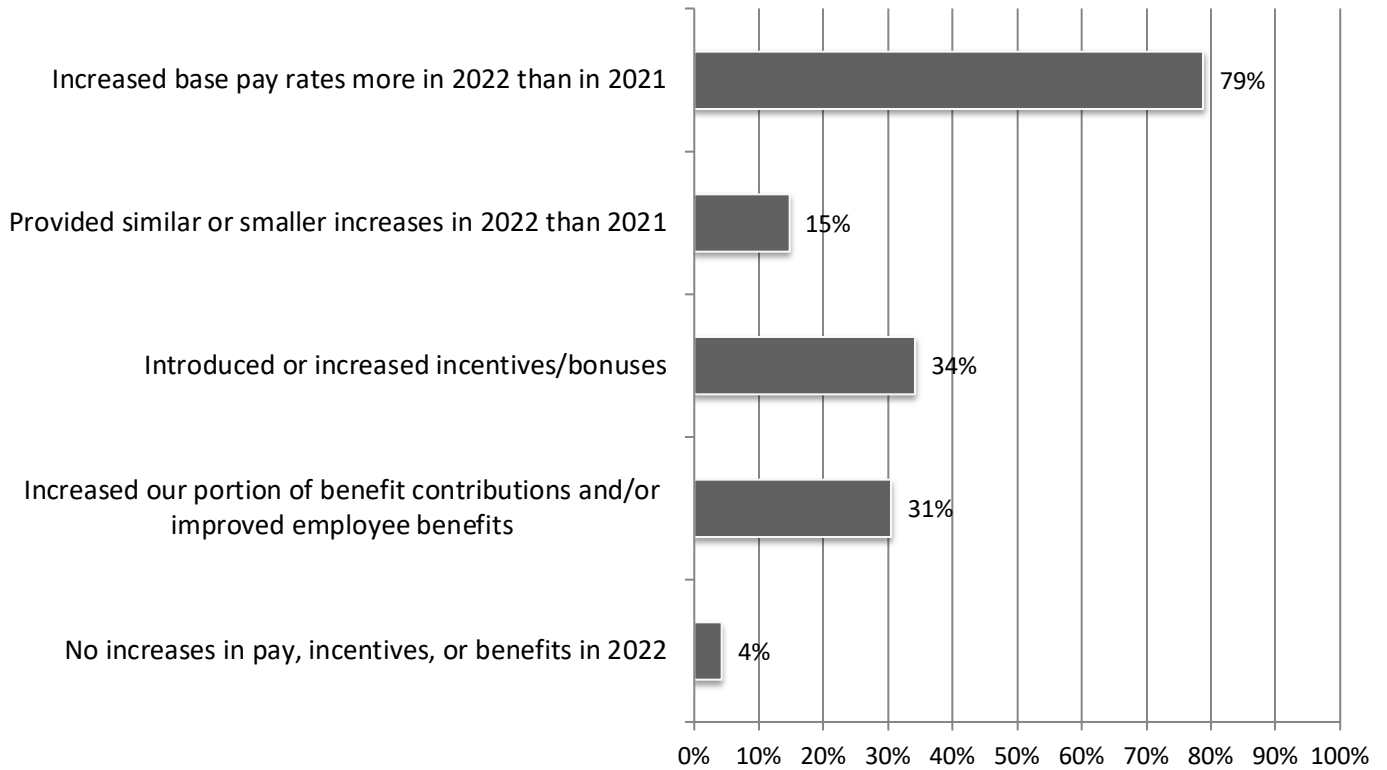
3. How would you describe your current situation in filling salaried and hourly craft positions? Responses: 492



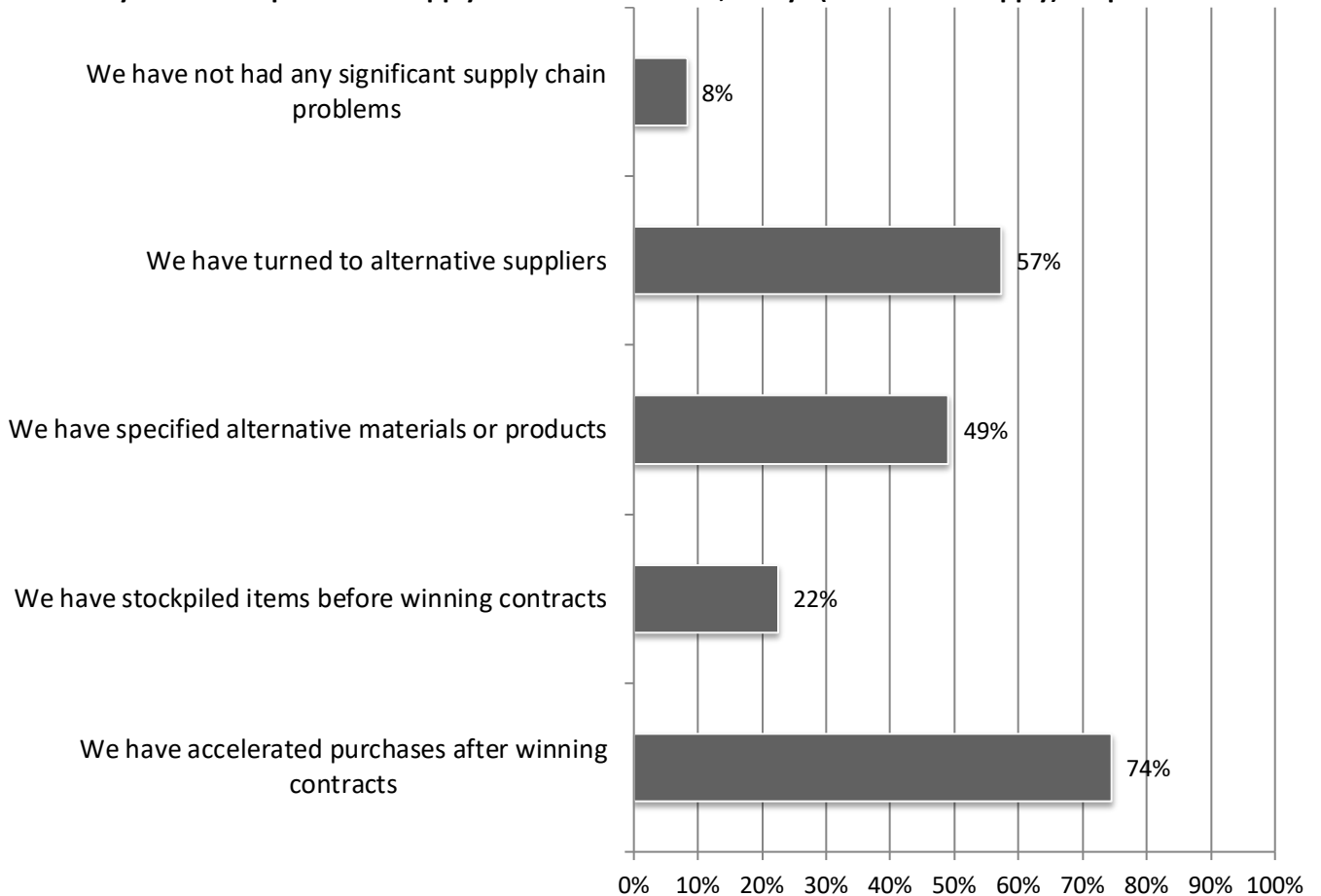
4. Do you expect any changes in the availability of hourly craft or salaried personnel over the coming 12 months? Responses: 493



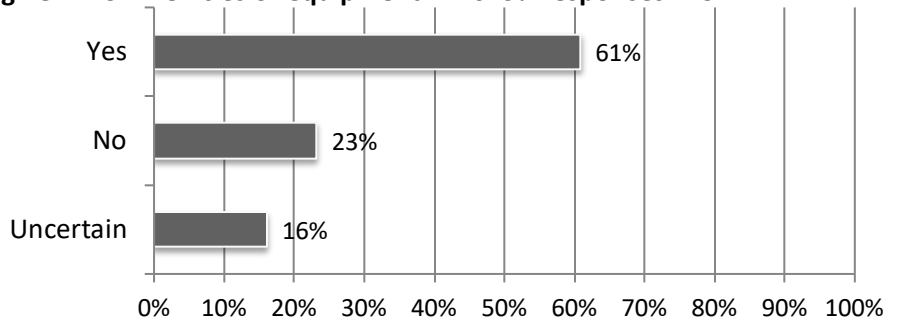
5. What changes did your firm make in pay or benefits in 2022? (mark all that apply) Responses: 491



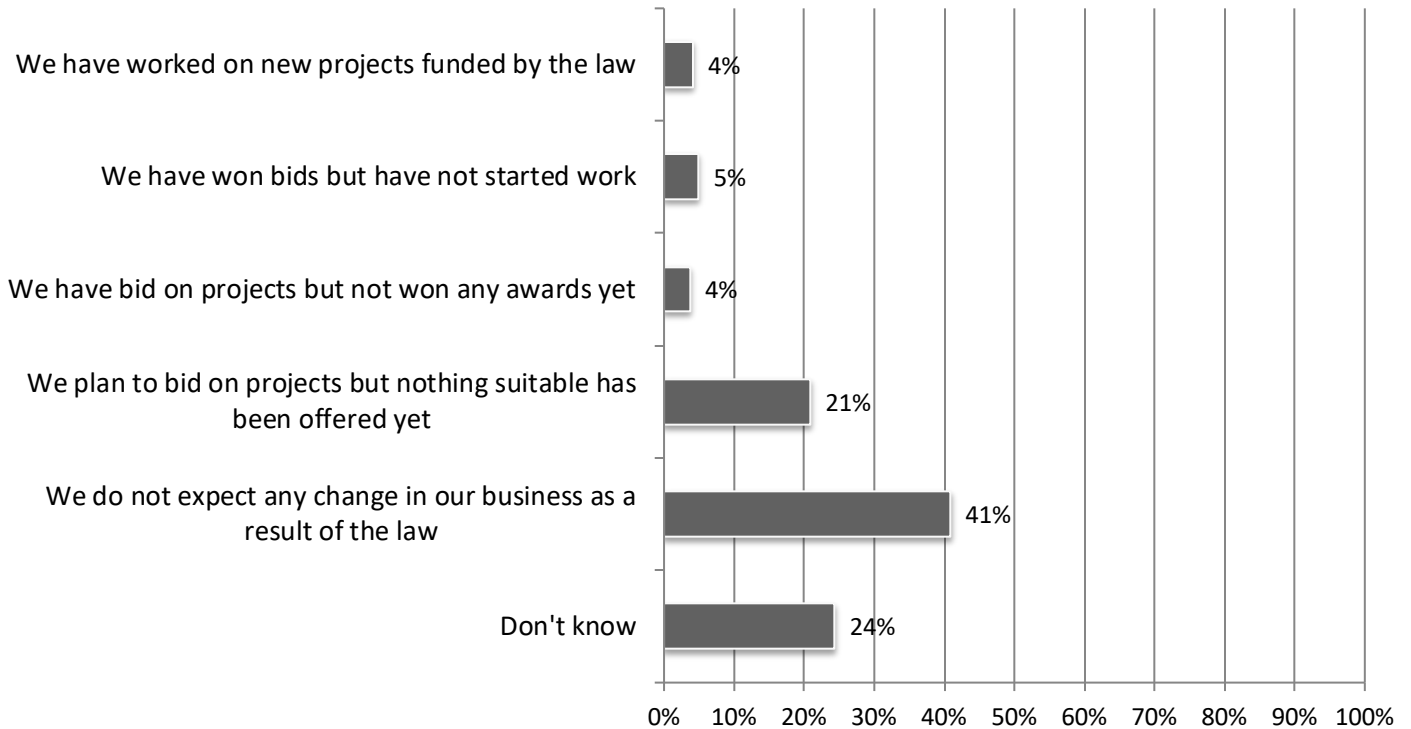
6. How has your firm responded to supply-chain issues in 2022, if any? (mark all that apply) Responses: 485



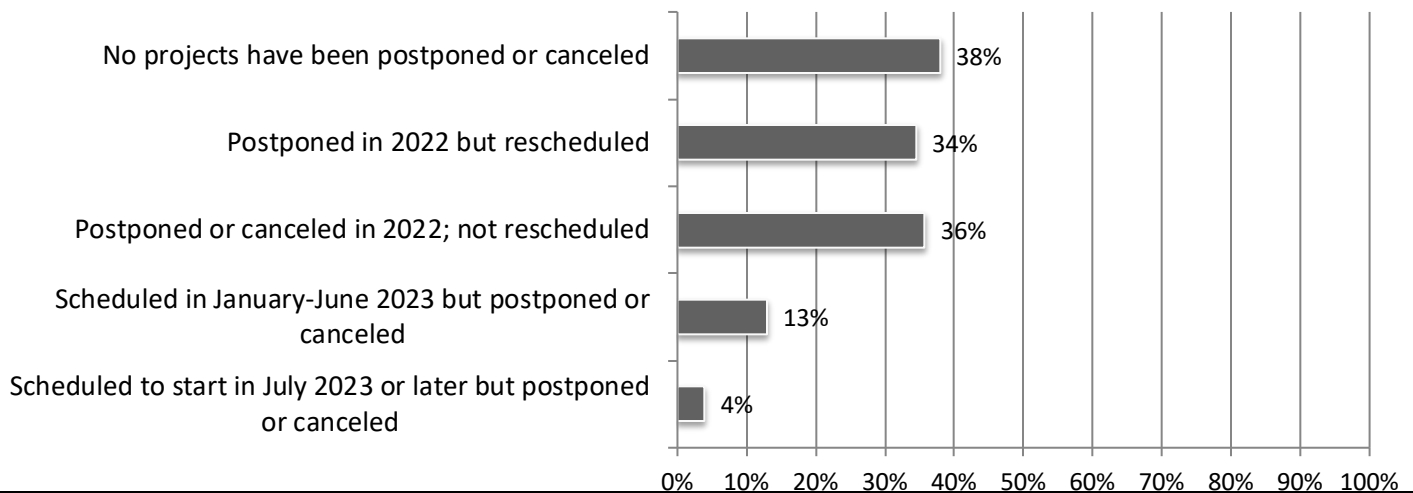
7. Do you anticipate purchasing/leasing new work vehicles or equipment in 2023? Responses: 492



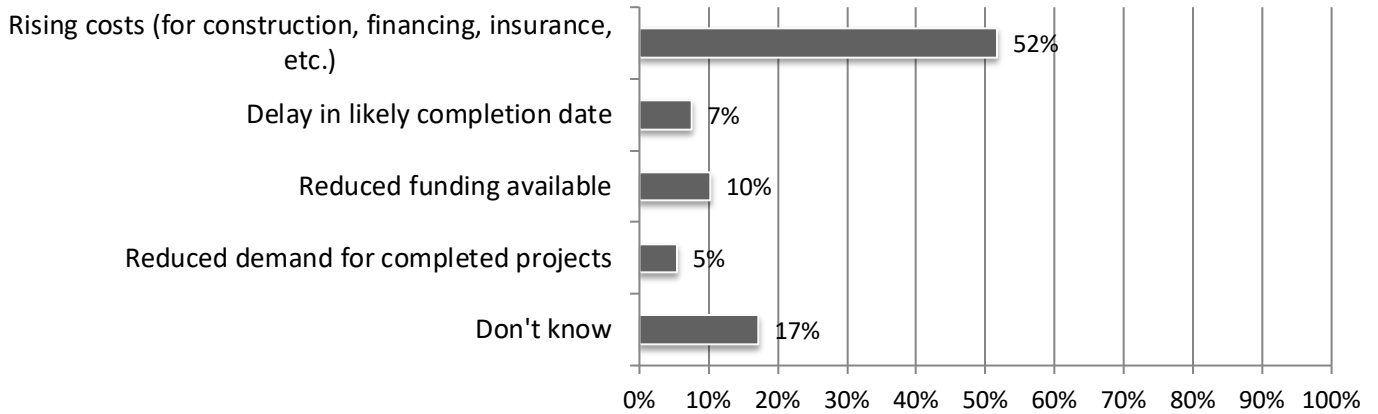
8. What difference, if any, has the Infrastructure Investment and Jobs Act of 2021 (the "Bipartisan Infrastructure Law") made to your business? Responses: 490



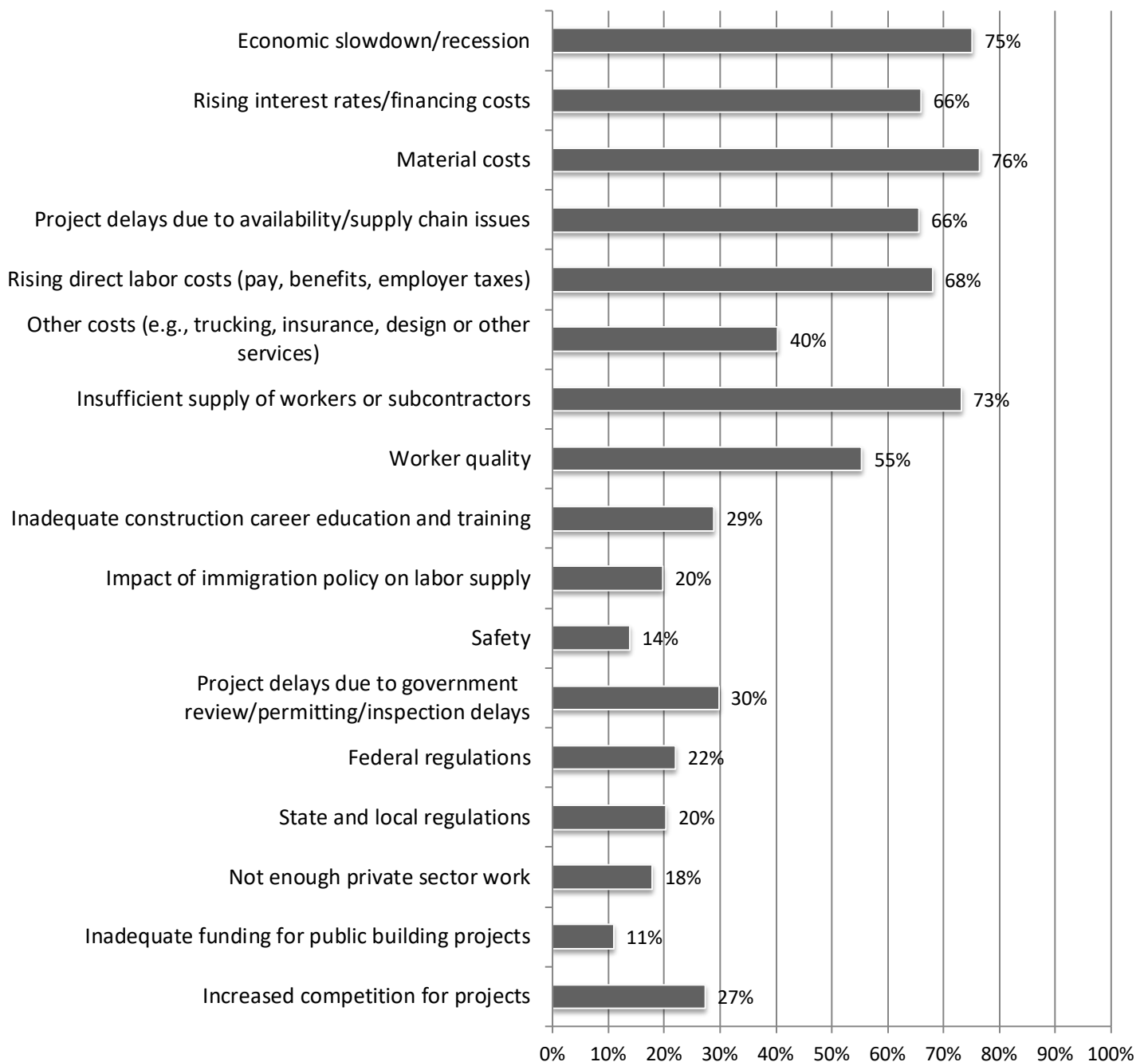
9. Did an owner postpone or cancel any projects that were scheduled to start in 2022 or 2023? (mark all that apply) Responses: 488



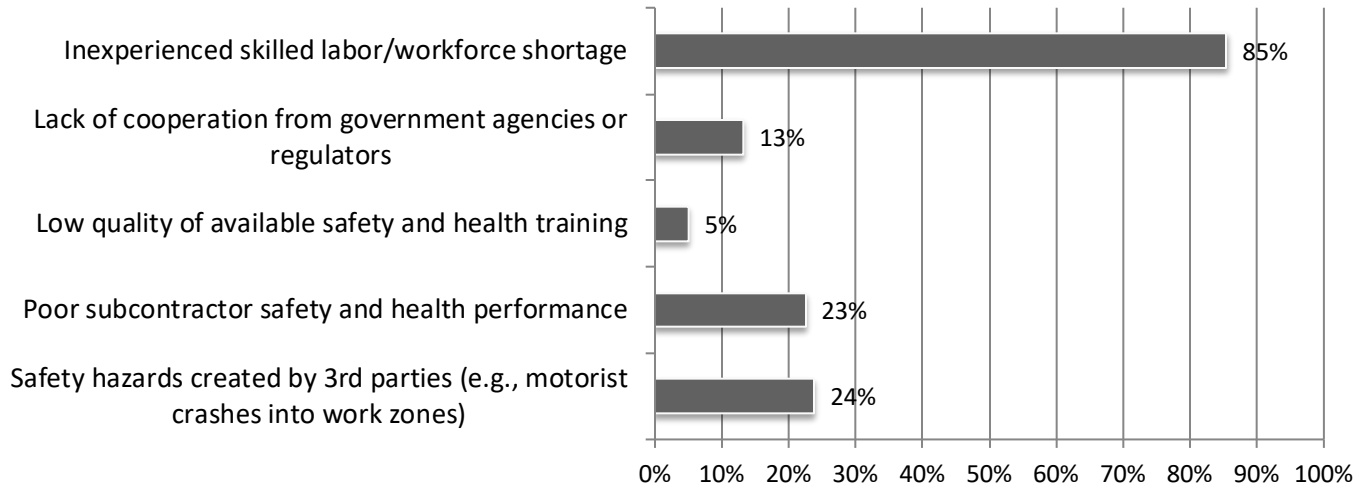
10. If projects were postponed or canceled, what was the main reason? Responses: 374



11. What are your biggest concerns for 2023? (mark all that apply) Responses: 491



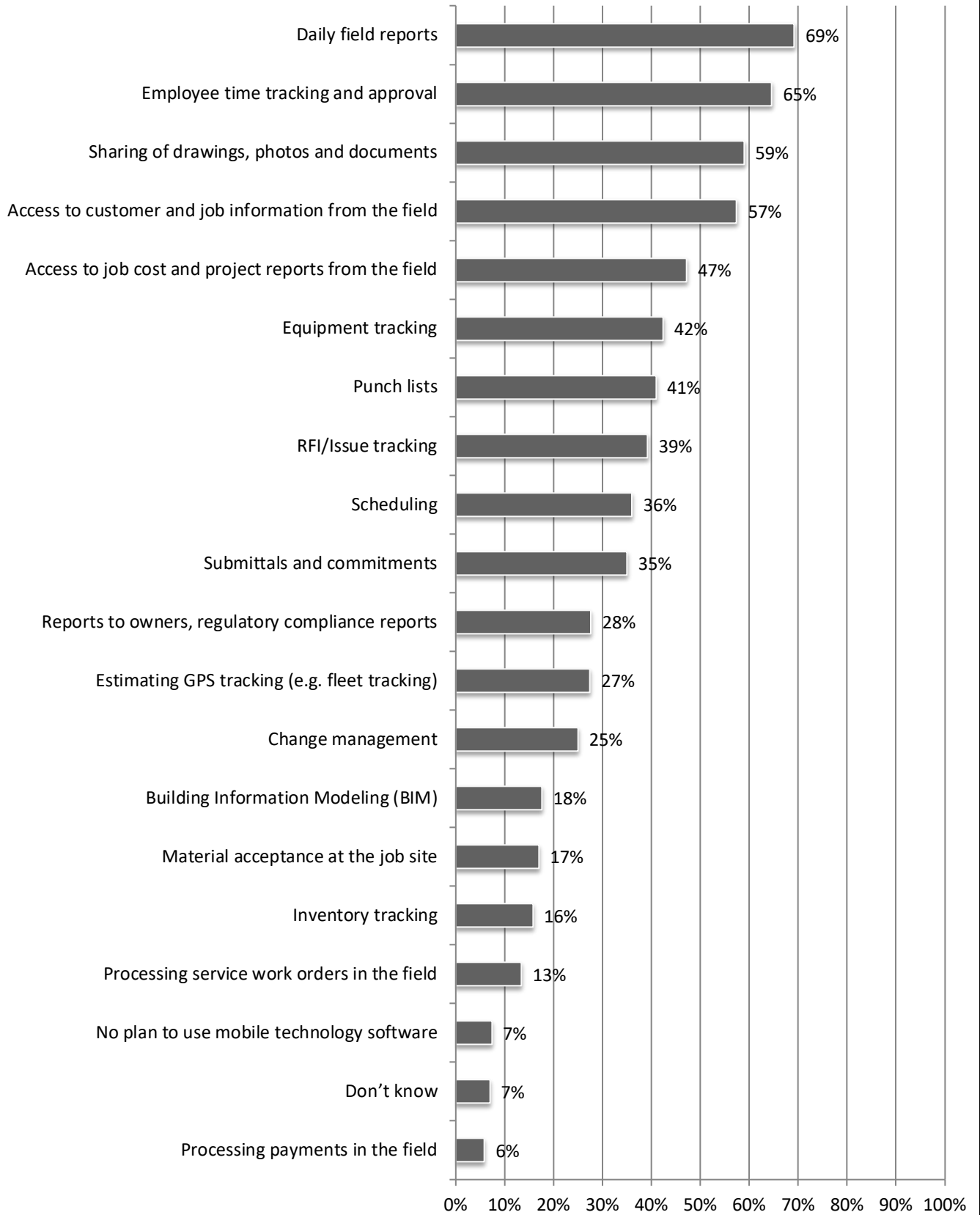
12. What challenges, if any, do you see regarding the safety and health of your firm's workers? (mark all that apply) Responses: 453



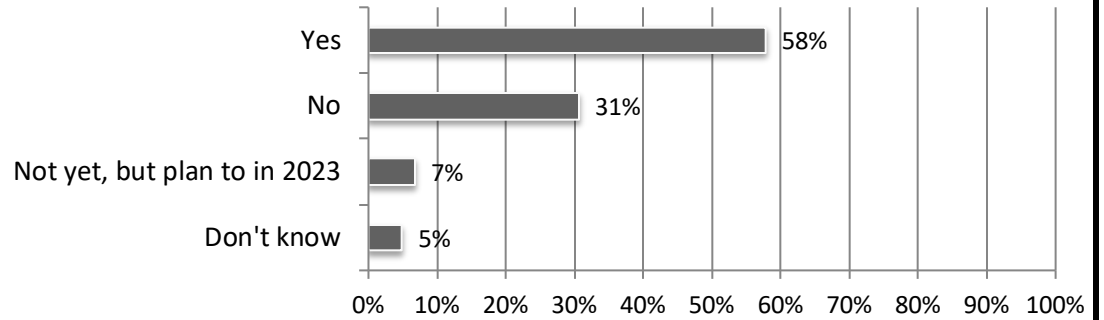
13. Compared to 2022, will your firm's 2023 investment in the following technologies change? (mark all that apply) Responses: 482

	Increase	Decrease	No change
Document management software	27%	1%	72%
Project management software	27%	2%	72%
Tool/asset management/tracking	24%	1%	75%
Accounting software	22%	2%	76%
Estimating software	22%	1%	77%
Fleet tracking/management software	21%	1%	78%
Building Information Modeling (BIM)	20%	1%	80%
Human resources (HR) software	19%	2%	79%
Scheduling software	17%	1%	82%
Client relationship management (CRM) software	16%	1%	83%
Payroll software	14%	1%	84%
Project collaboration software	14%	1%	86%
Subcontractor bid management/ITB software	9%	1%	91%
Service management software	7%	1%	92%
Prequalification software	5%	1%	94%

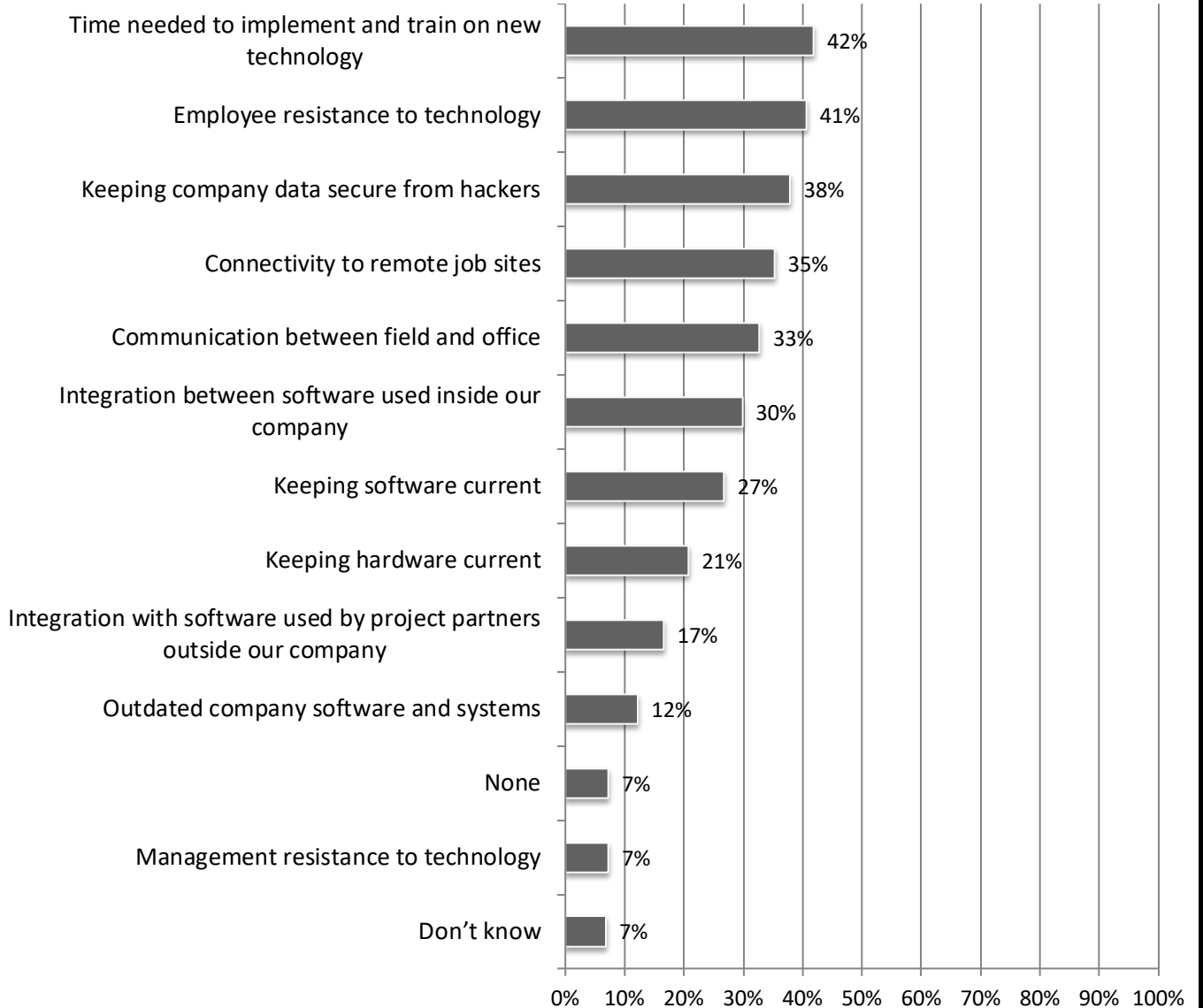
14. How does your company plan to use mobile software technology? (mark all that apply) Responses: 477



15. Does your firm currently have a formal IT plan to support your business objectives? Responses: 490

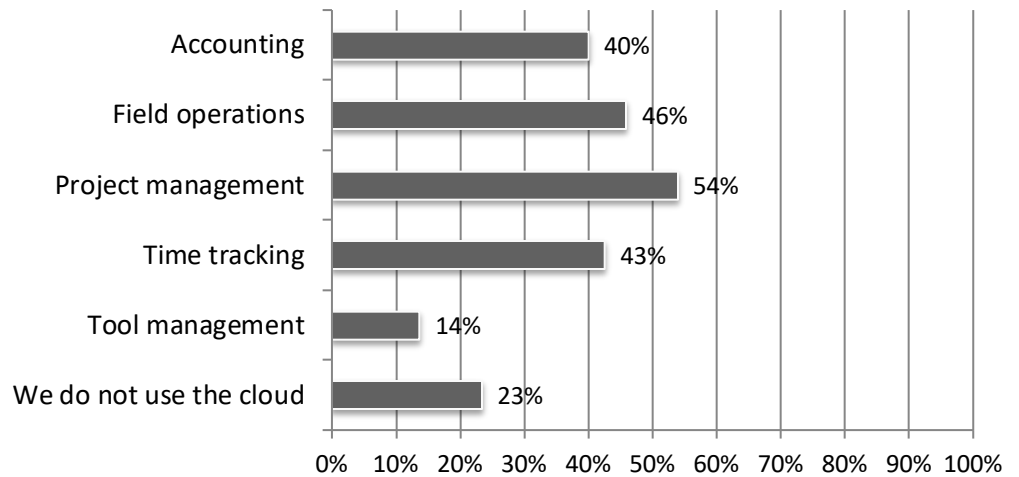


16. What are your biggest IT challenges (mark all that apply)? Responses: 483

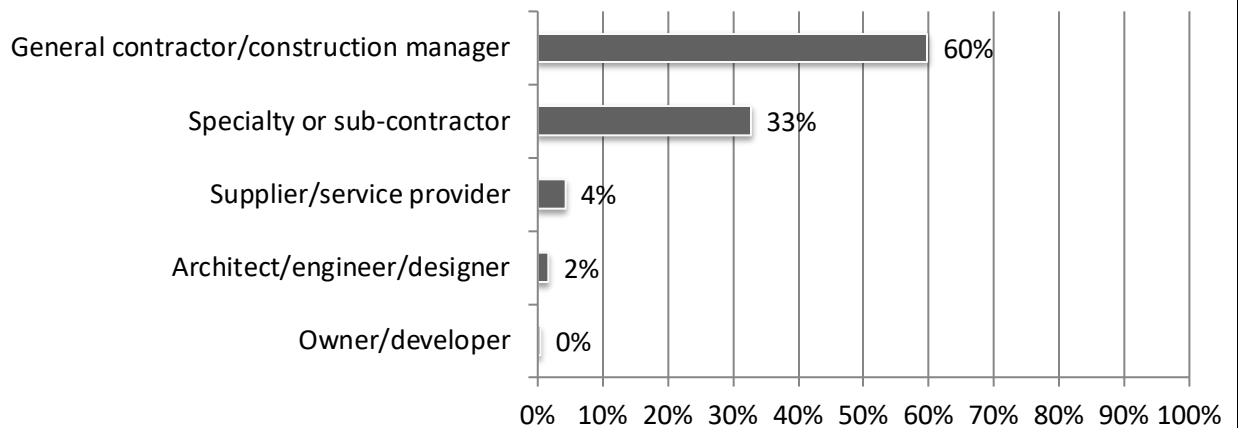


17. Does your firm use cloud-hosted technology in any of the following ways (mark all that apply)?

Responses: 475

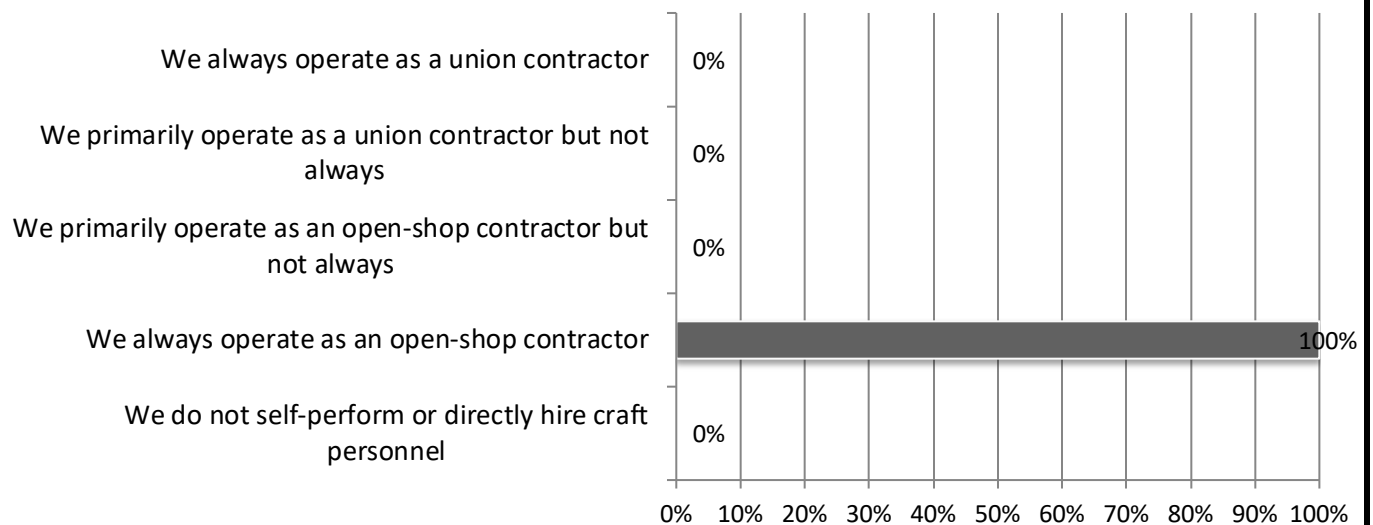


18. What best describes your firm? Responses: 490

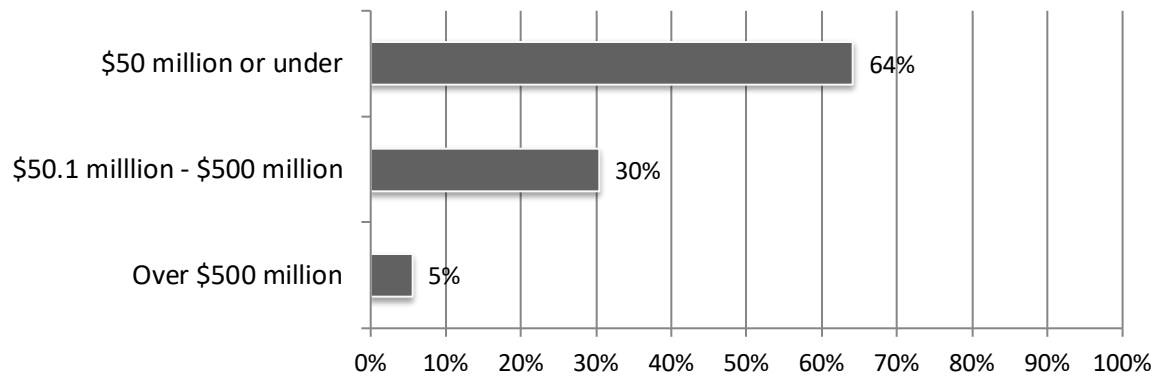


19. When you self-perform construction work, do you operate as a union contractor or an open-shop contractor?

Responses: 493



20. Estimate the total dollar amount of work your firm performed in 2022. Responses: 491



21. How many total employees does your firm employ at all of its locations? Responses: 488

