



AGC
THE CONSTRUCTION
ASSOCIATION

Sage

2023 Construction Outlook Over \$500 million Survey Results

Total Responses: 77. Responses varied for some questions. Percentages are based on responses to each question and may not sum to 100 due to rounding.

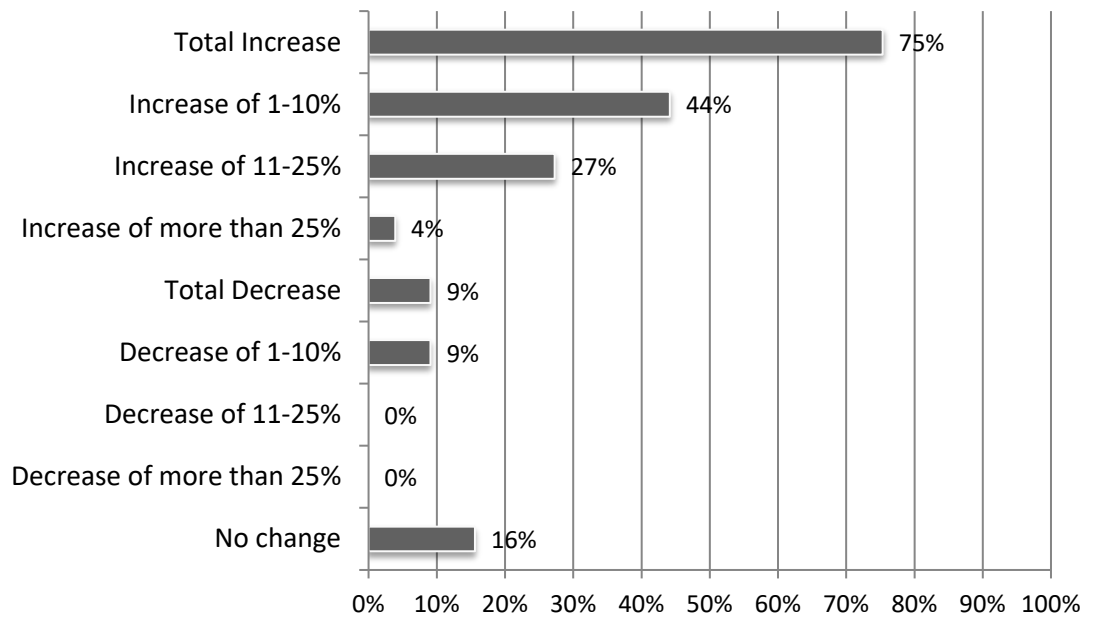
- 1. Compared to 2022, do you expect the available dollar value of projects you compete for in 2023 to be higher/lower/about the same? (answer for all market areas in which your business operates):**

Responses: 76

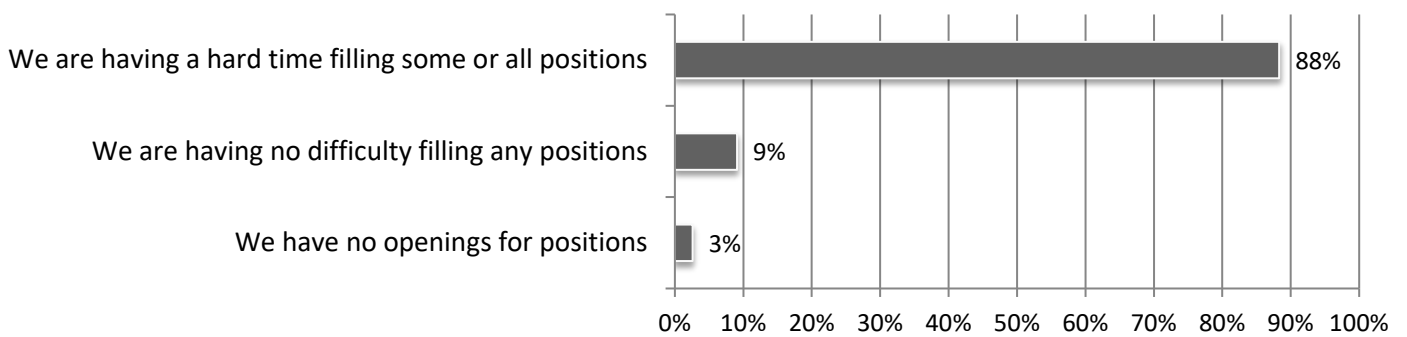
Market	Higher	Lower	Same	Net*	US Net
Federal (e.g., VA, GSA, USACE, NAVFAC)	61%	3%	36%	58%	37%
Water/Sewer	55%	2%	43%	53%	38%
Transportation (e.g., transit, rail, airport)	52%	6%	42%	46%	42%
Bridge/Highway	51%	8%	41%	43%	42%
Other Healthcare	54%	11%	35%	43%	28%
Power	48%	7%	46%	41%	28%
Hospital	46%	13%	41%	33%	23%
Public Building	36%	7%	58%	29%	23%
Other	25%	0%	75%	25%	10%
Higher Education	39%	18%	43%	21%	16%
Manufacturing	50%	30%	20%	20%	14%
Data Center	42%	23%	35%	19%	12%
K-12 School	24%	24%	53%	0%	16%
Warehouse	32%	34%	34%	-2%	10%
Multifamily Residential	32%	37%	32%	-5%	1%
Lodging	18%	27%	55%	-8%	-4%
Retail	11%	39%	50%	-28%	-22%
Private Office	18%	53%	29%	-35%	-21%

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

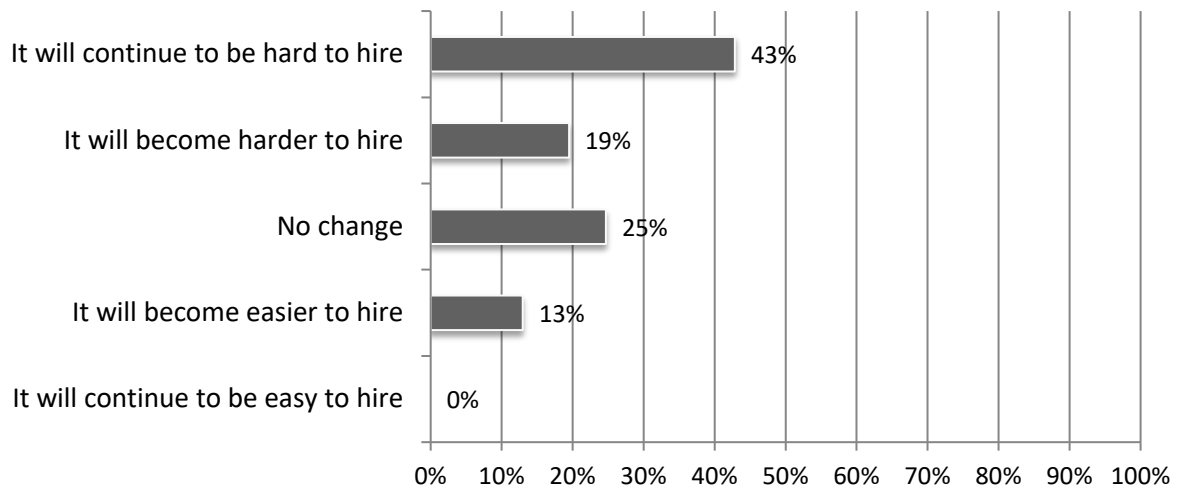
2. What percent change do you expect in your headcount in 2023? Responses: 77



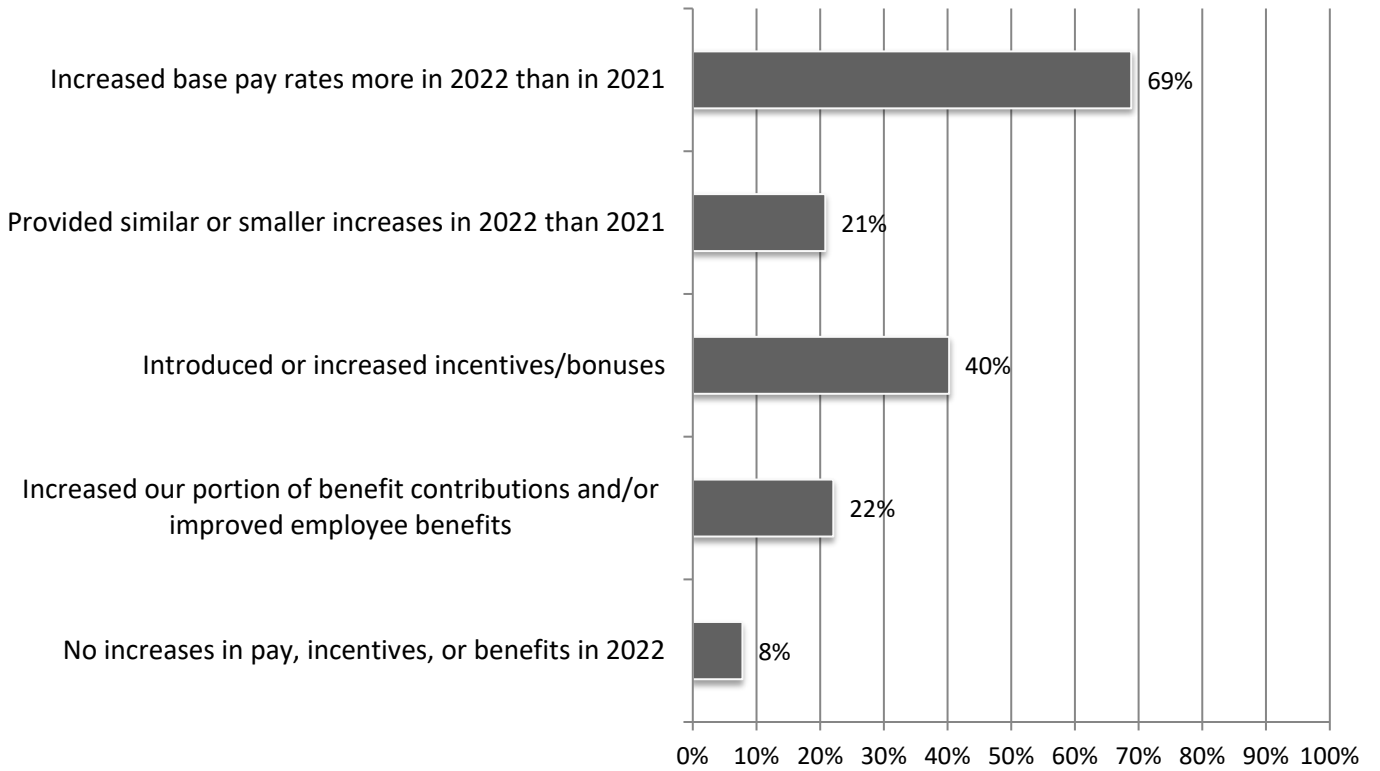
3. How would you describe your current situation in filling salaried and hourly craft positions? Responses: 77



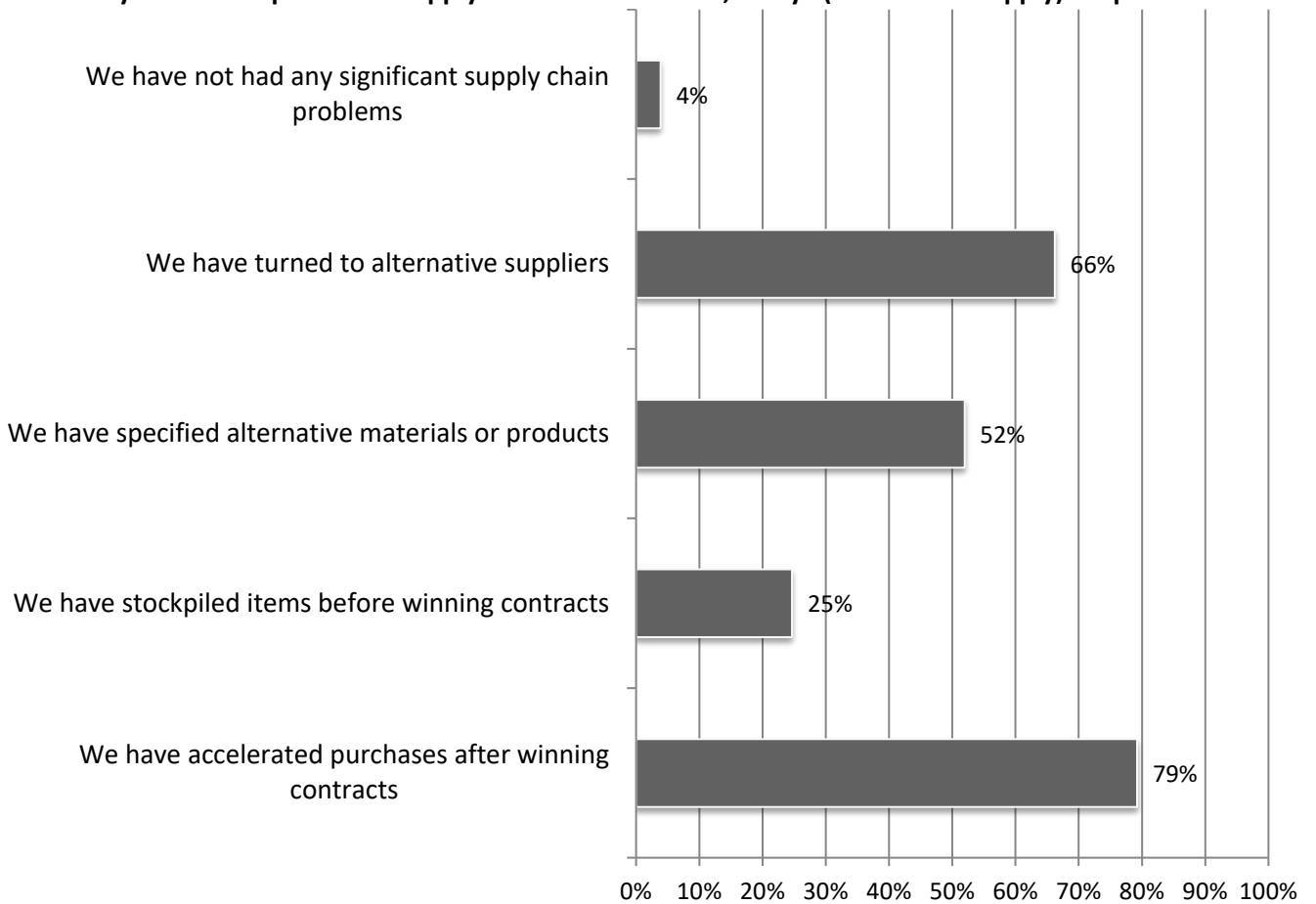
4. Do you expect any changes in the availability of hourly craft or salaried personnel over the coming 12 months? Responses: 77



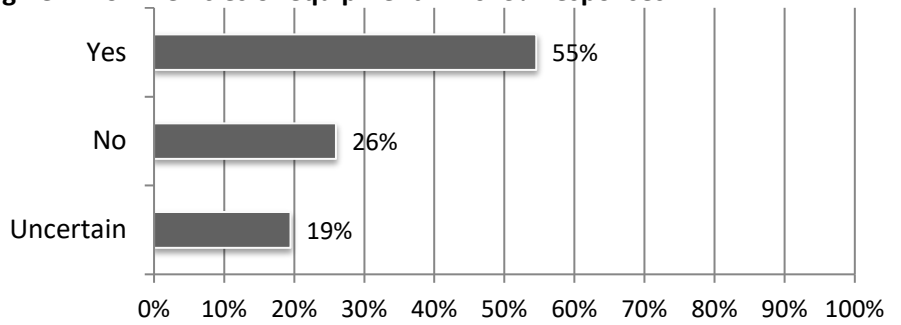
5. What changes did your firm make in pay or benefits in 2022? (mark all that apply) Responses: 77



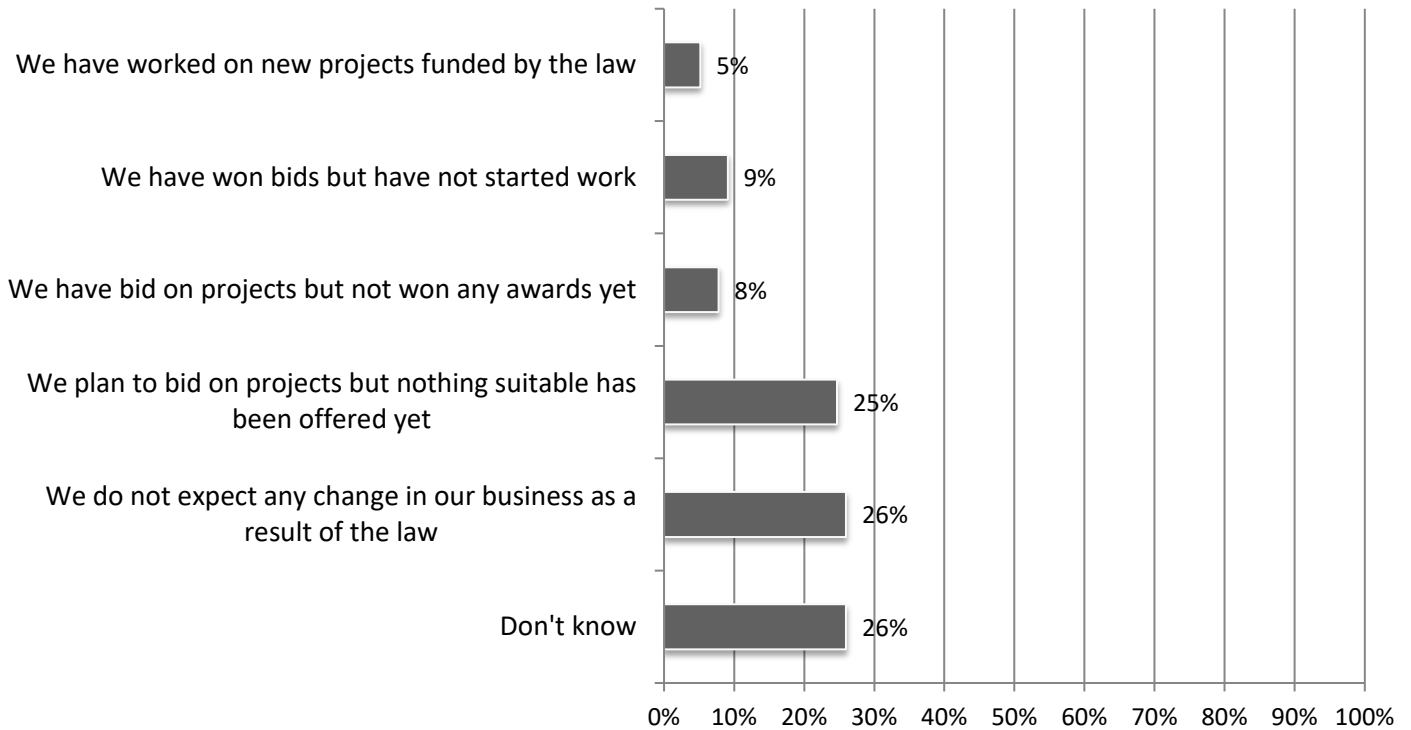
6. How has your firm responded to supply-chain issues in 2022, if any? (mark all that apply) Responses: 77



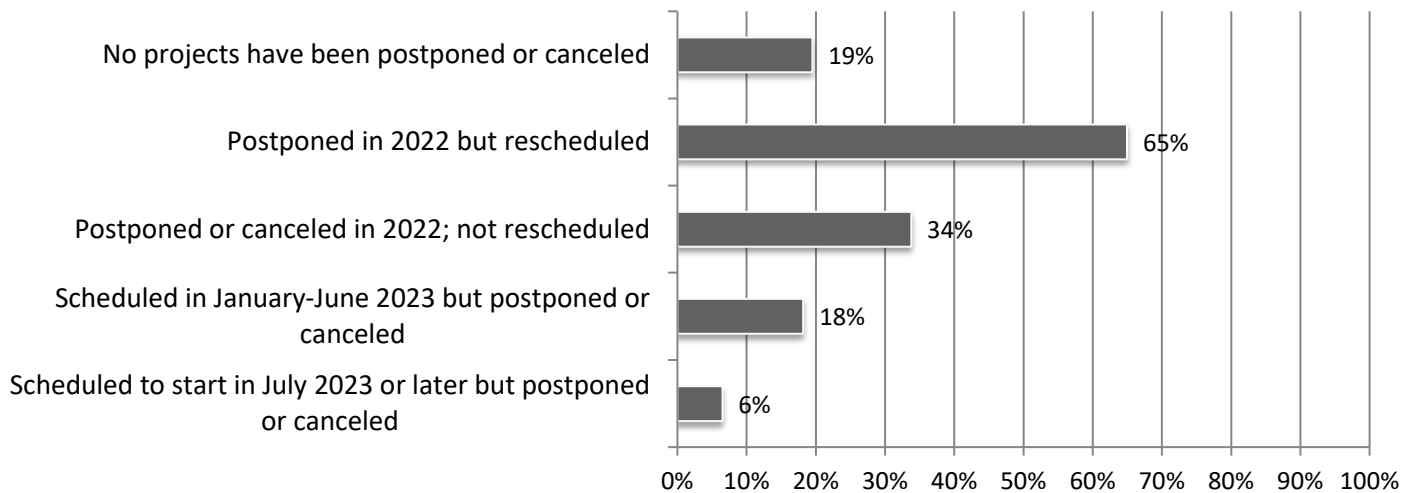
7. Do you anticipate purchasing/leasing new work vehicles or equipment in 2023? Responses: 77



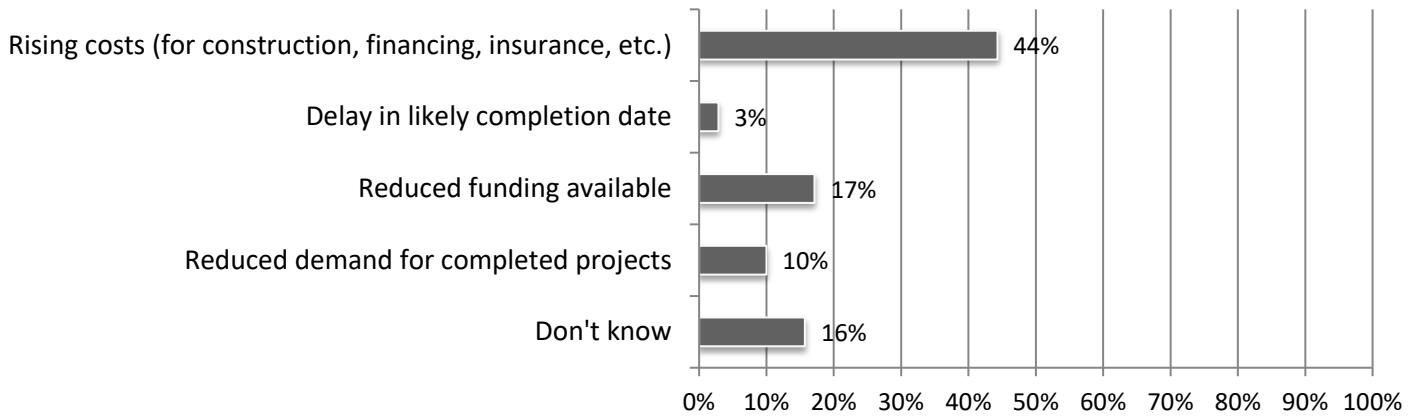
8. What difference, if any, has the Infrastructure Investment and Jobs Act of 2021 (the "Bipartisan Infrastructure Law") made to your business? Responses: 77



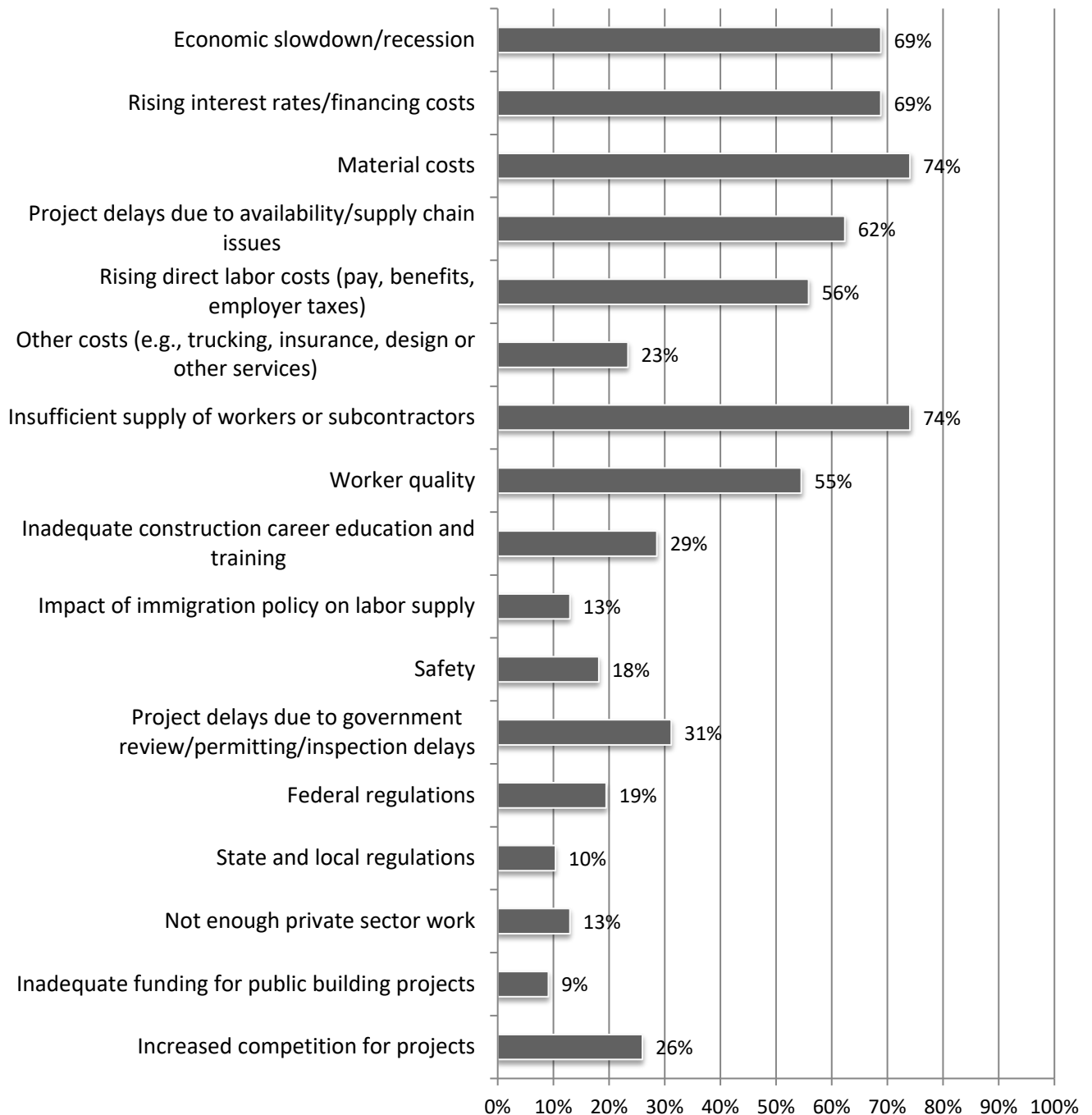
9. Did an owner postpone or cancel any projects that were scheduled to start in 2022 or 2023? (mark all that apply) Responses: 77



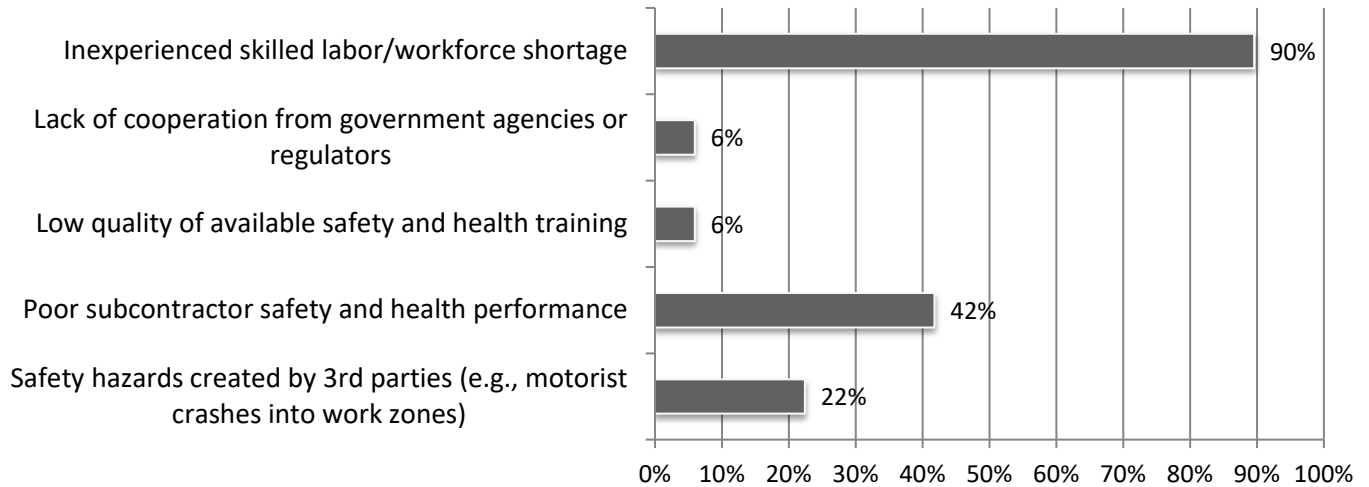
10. If projects were postponed or canceled, what was the main reason? Responses: 70



11. What are your biggest concerns for 2023? (mark all that apply) Responses: 77



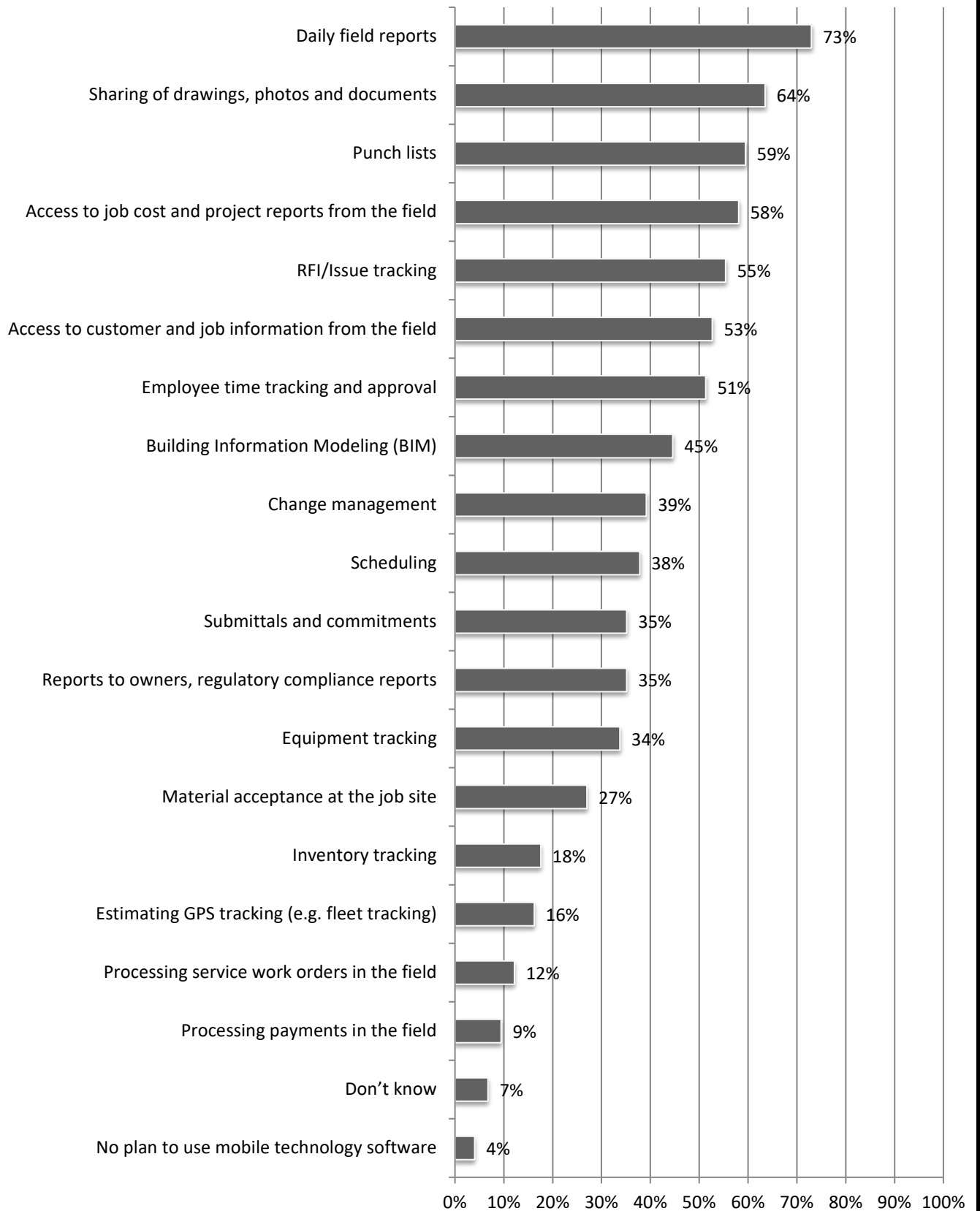
12. What challenges, if any, do you see regarding the safety and health of your firm's workers? (mark all that apply) Responses: 67



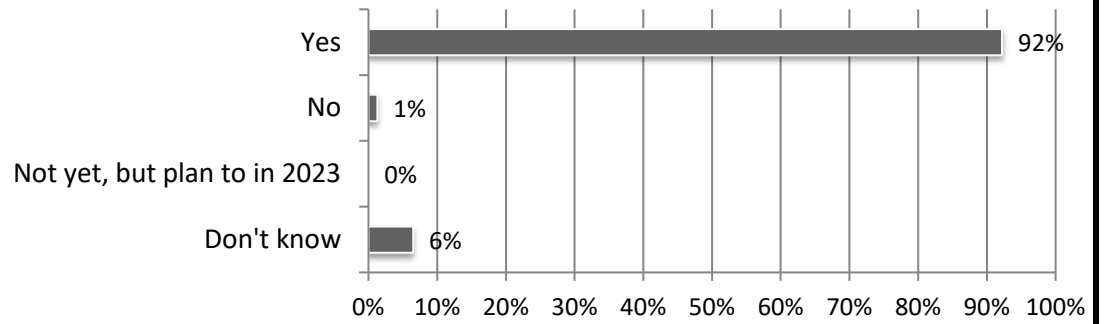
13. Compared to 2022, will your firm's 2023 investment in the following technologies change? (mark all that apply) Responses: 72

	Increase	Decrease	No change
Building Information Modeling (BIM)	43%	0%	57%
Document management software	43%	0%	57%
Human resources (HR) software	37%	0%	63%
Project management software	37%	1%	62%
Project collaboration software	32%	1%	67%
Estimating software	28%	1%	71%
Accounting software	26%	1%	72%
Scheduling software	24%	0%	76%
Fleet tracking/management software	23%	0%	77%
Client relationship management (CRM) software	21%	1%	78%
Tool/asset management/tracking	21%	0%	79%
Prequalification software	20%	2%	78%
Payroll software	18%	0%	82%
Subcontractor bid management/ITB software	16%	2%	83%
Service management software	5%	0%	95%

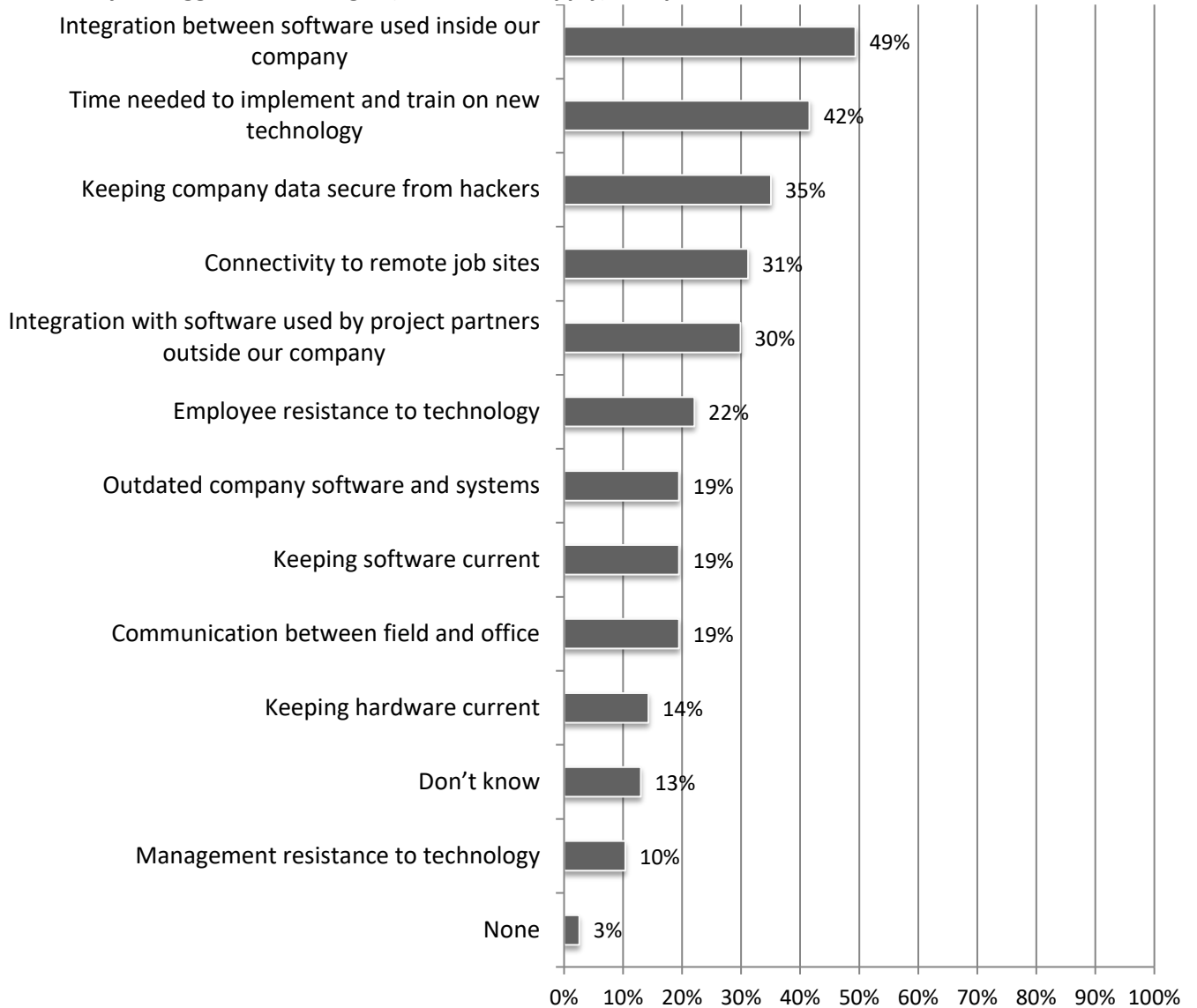
14. How does your company plan to use mobile software technology? (mark all that apply) Responses: 74



15. Does your firm currently have a formal IT plan to support your business objectives? Responses: 77

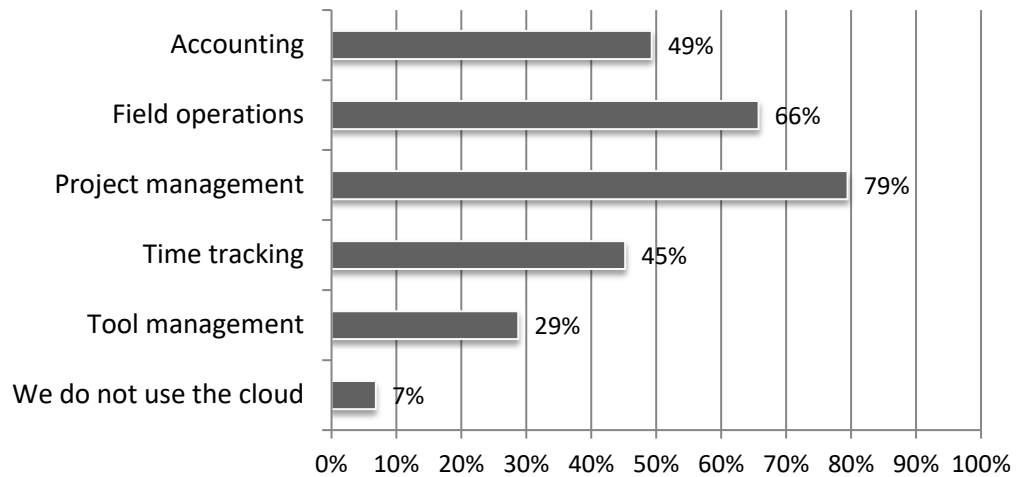


16. What are your biggest IT challenges (mark all that apply)? Responses: 77

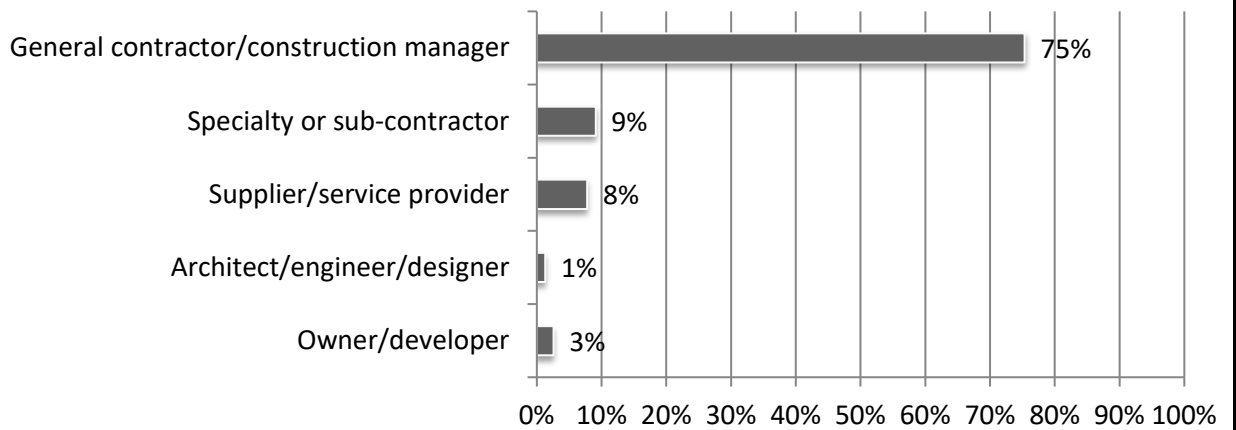


17. Does your firm use cloud-hosted technology in any of the following ways (mark all that apply)?

Responses: 73

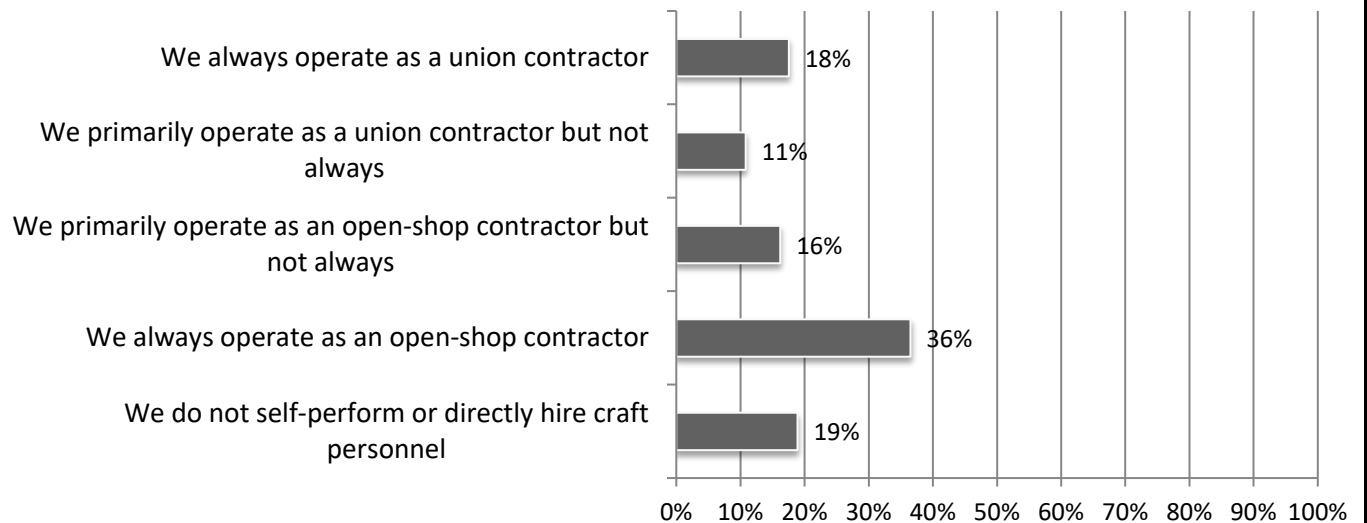


18. What best describes your firm? Responses: 77

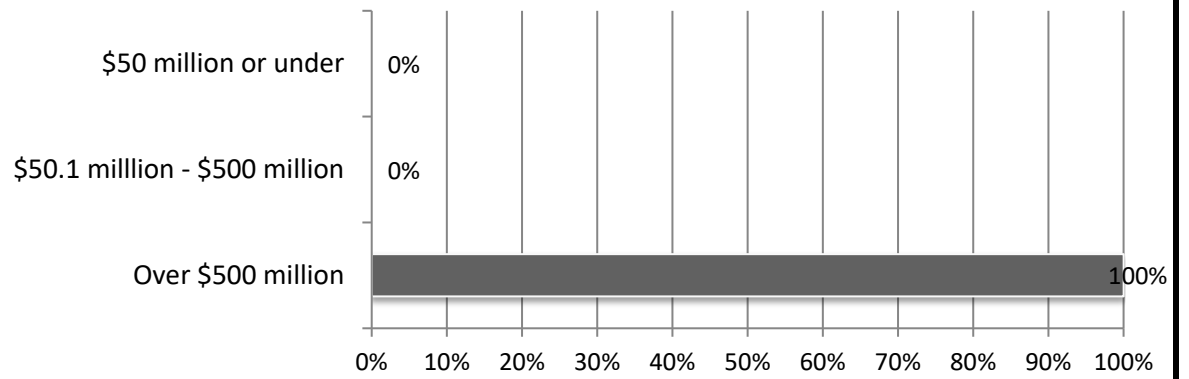


19. When you self-perform construction work, do you operate as a union contractor or an open-shop contractor?

Responses: 74



20. Estimate the total dollar amount of work your firm performed in 2022. Responses: 77



21. How many total employees does your firm employ at all of its locations? Responses: 76

