



**AGC**  
THE CONSTRUCTION  
ASSOCIATION

**Sage**

## 2023 Construction Outlook South Survey Results

*Total Responses: 337. Responses varied for some questions. Percentages are based on responses to each question and may not sum to 100 due to rounding.*

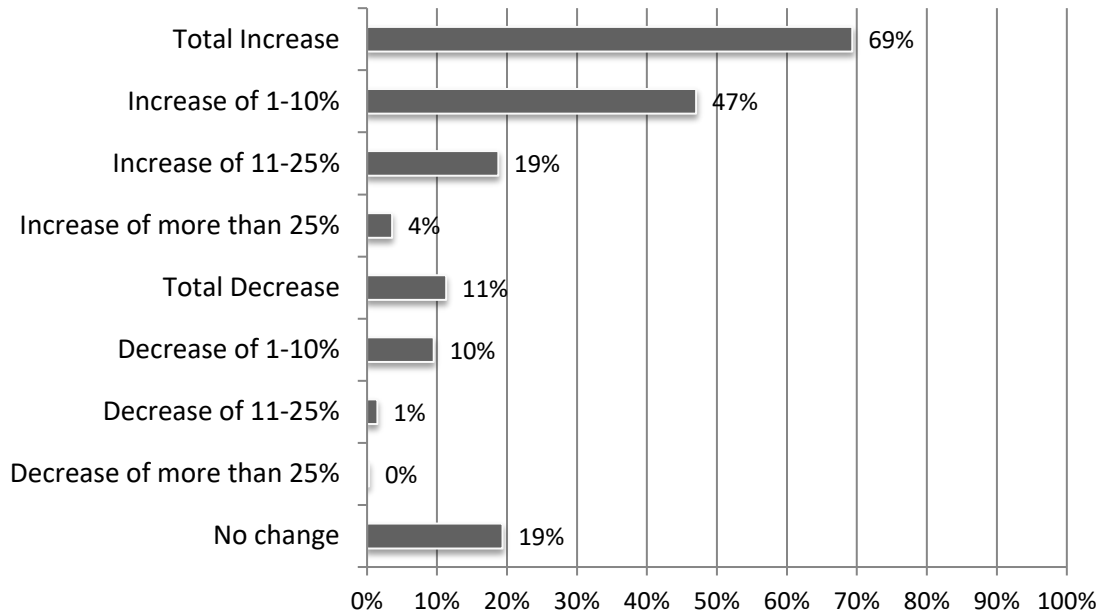
1. Compared to 2022, do you expect the available dollar value of projects you compete for in 2023 to be higher/lower/about the same? (answer for all market areas in which your business operates):

**Responses: 332**

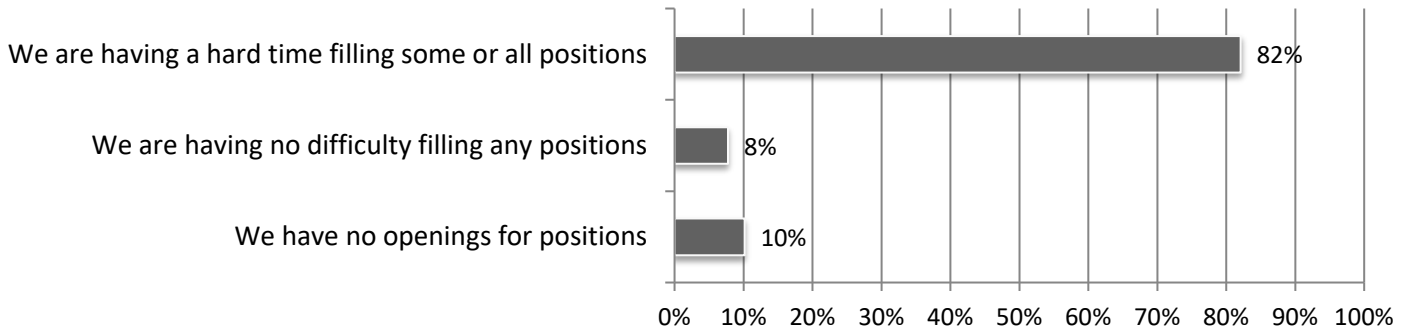
Market	Higher	Lower	Same	Net*	US Net
Water/Sewer	47%	8%	45%	39%	38%
Transportation (e.g., transit, rail, airport)	49%	11%	40%	39%	42%
Bridge/Highway	47%	10%	43%	37%	42%
Other Healthcare	45%	13%	42%	32%	28%
Federal (e.g., VA, GSA, USACE, NAVFAC)	43%	12%	45%	32%	37%
Public Building	42%	14%	45%	28%	23%
Hospital	39%	13%	48%	27%	23%
K-12 School	37%	17%	47%	20%	16%
Warehouse	40%	24%	35%	16%	10%
Higher Education	34%	18%	48%	16%	16%
Power	30%	18%	53%	12%	28%
Manufacturing	38%	27%	35%	11%	14%
Data Center	33%	24%	43%	9%	12%
Other	24%	19%	57%	4%	10%
Multifamily Residential	37%	34%	29%	3%	1%
Lodging	28%	33%	39%	-5%	-4%
Private Office	24%	39%	38%	-15%	-21%
Retail	25%	43%	32%	-18%	-22%

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

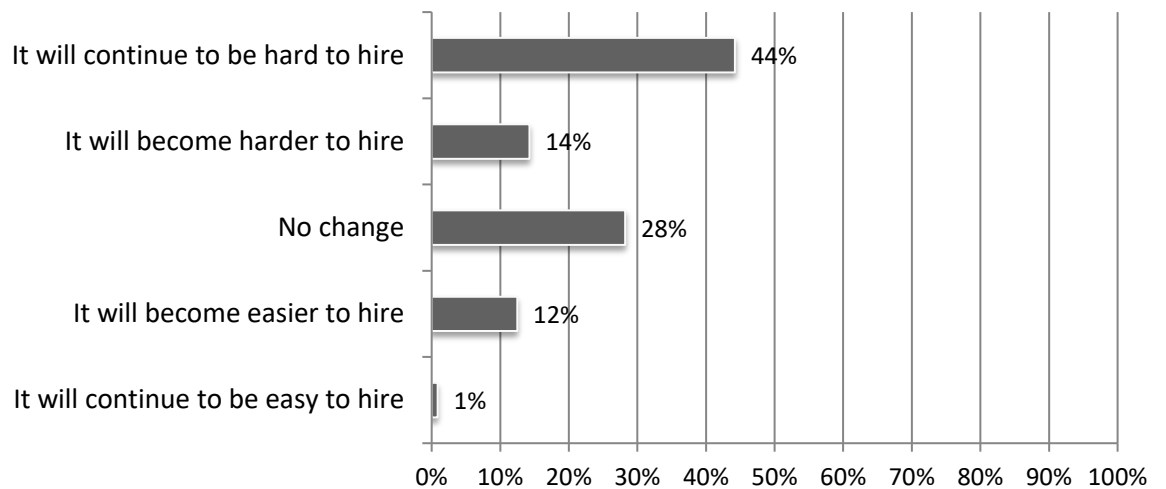
**2. What percent change do you expect in your headcount in 2023? Responses: 336**



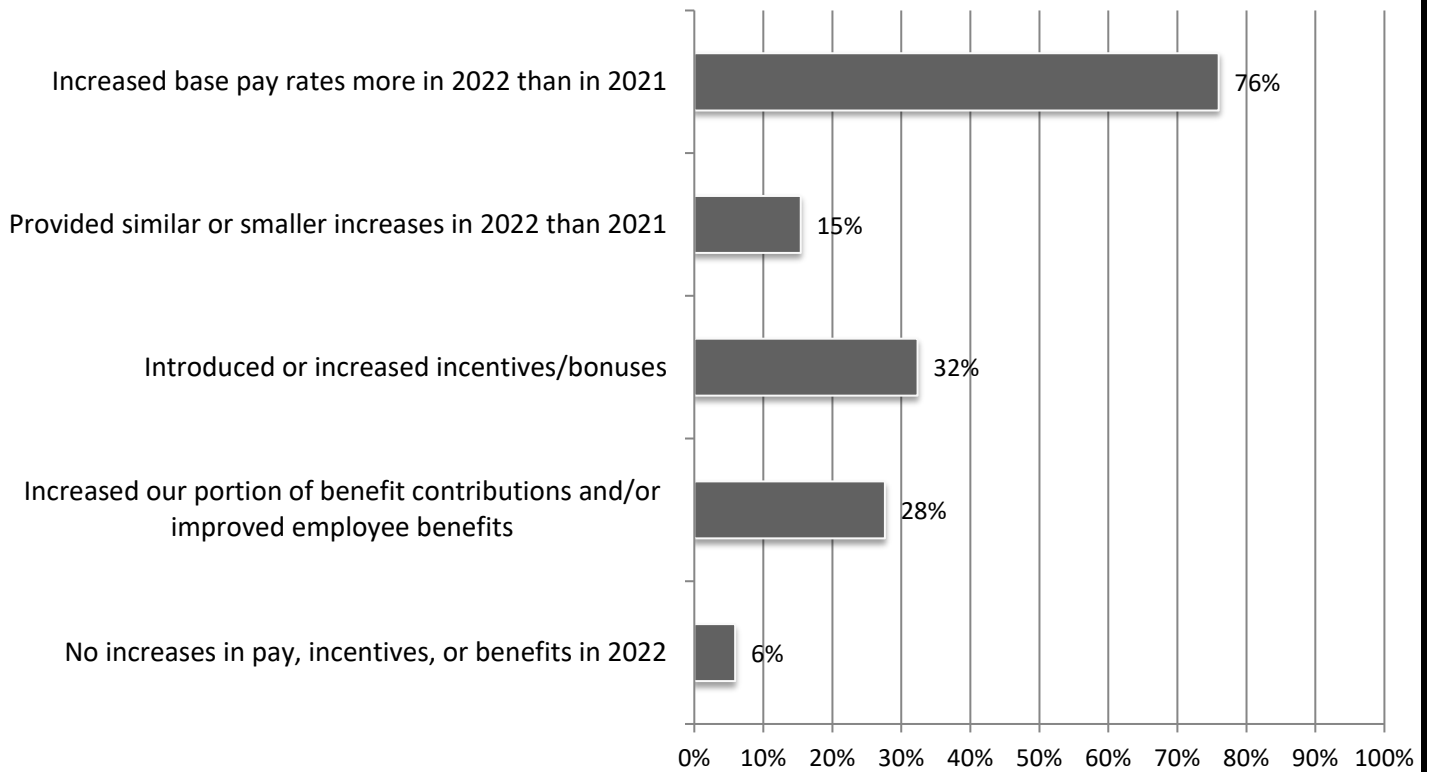
**3. How would you describe your current situation in filling salaried and hourly craft positions? Responses: 335**



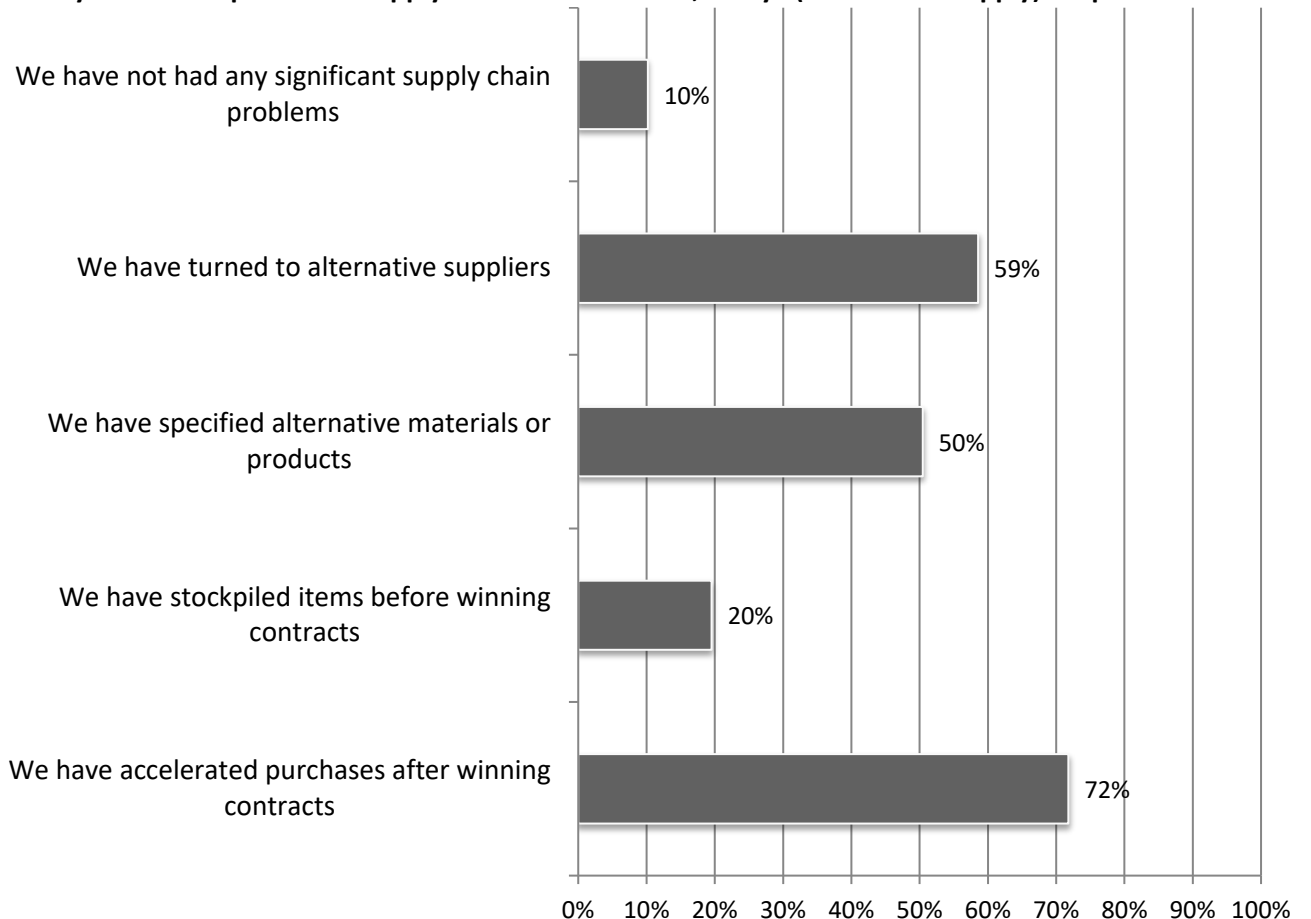
**4. Do you expect any changes in the availability of hourly craft or salaried personnel over the coming 12 months? Responses: 337**



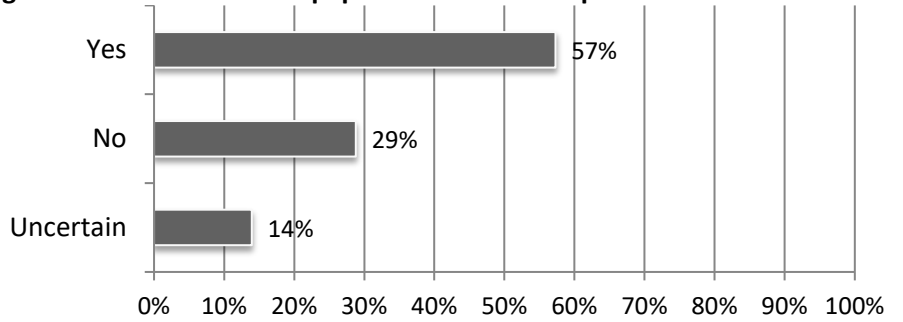
**5. What changes did your firm make in pay or benefits in 2022? (mark all that apply) Responses: 337**



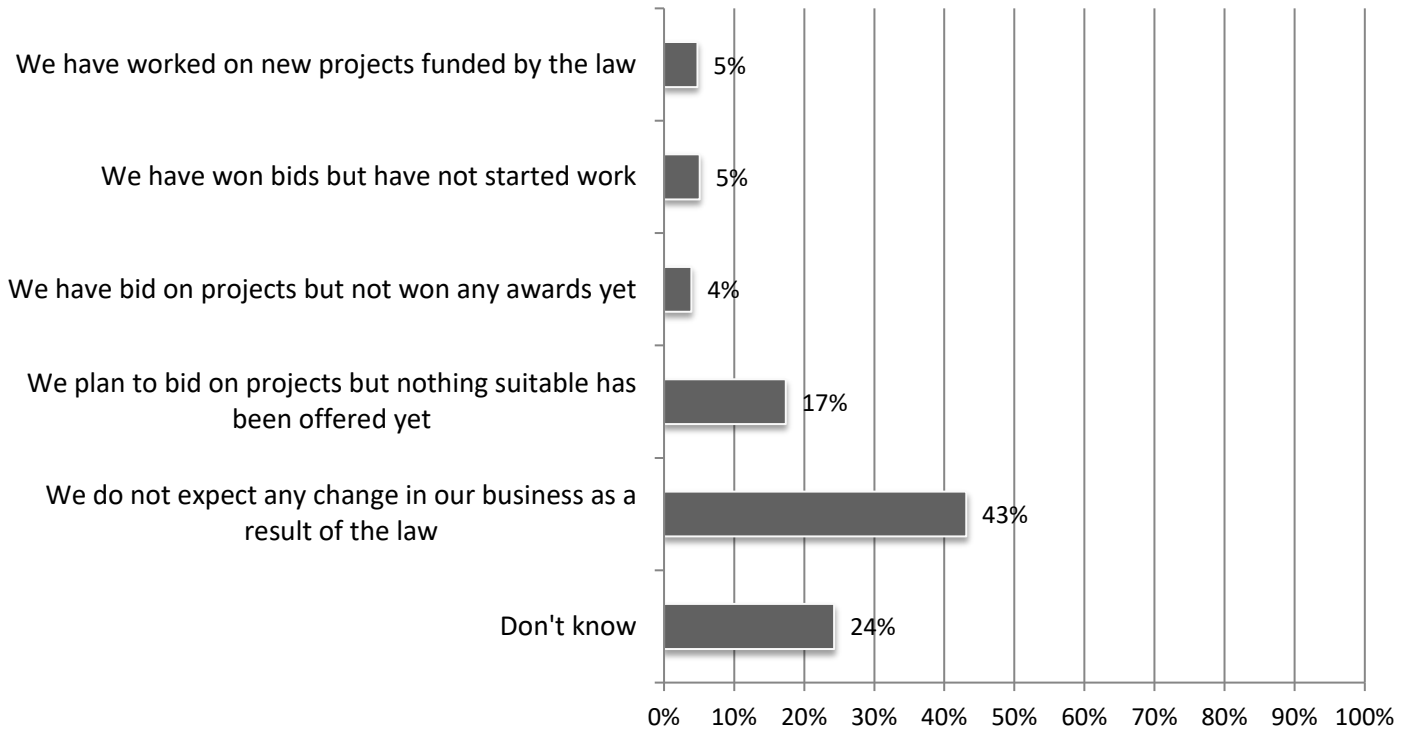
**6. How has your firm responded to supply-chain issues in 2022, if any? (mark all that apply) Responses: 333**



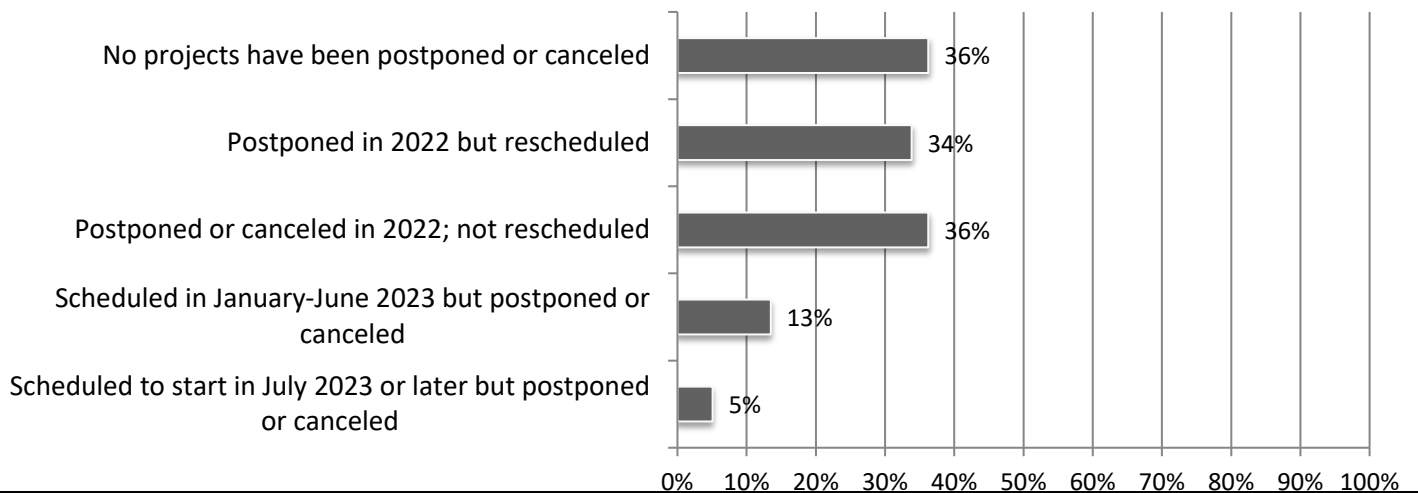
**7. Do you anticipate purchasing/leasing new work vehicles or equipment in 2023? Responses: 337**



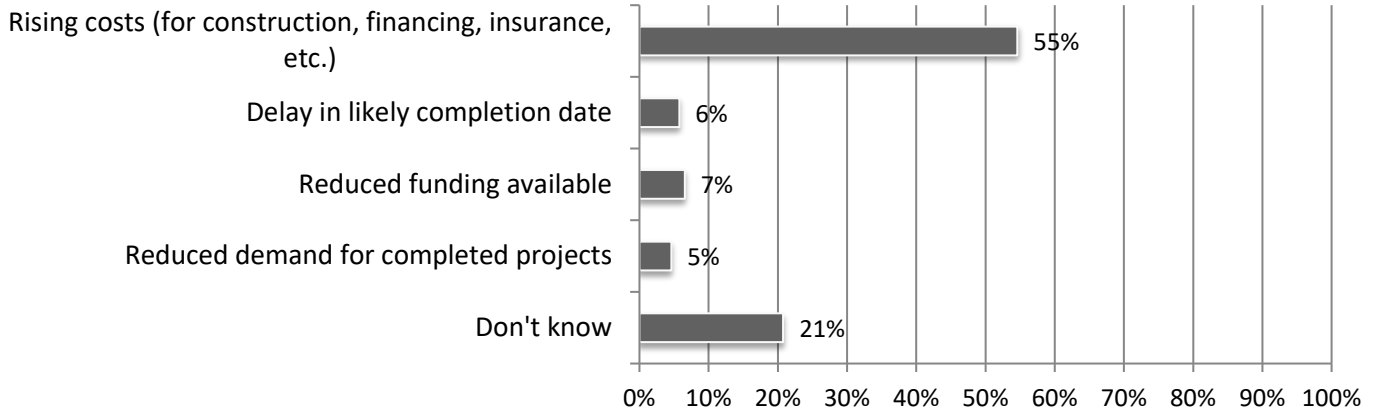
**8. What difference, if any, has the Infrastructure Investment and Jobs Act of 2021 (the "Bipartisan Infrastructure Law") made to your business? Responses: 334**



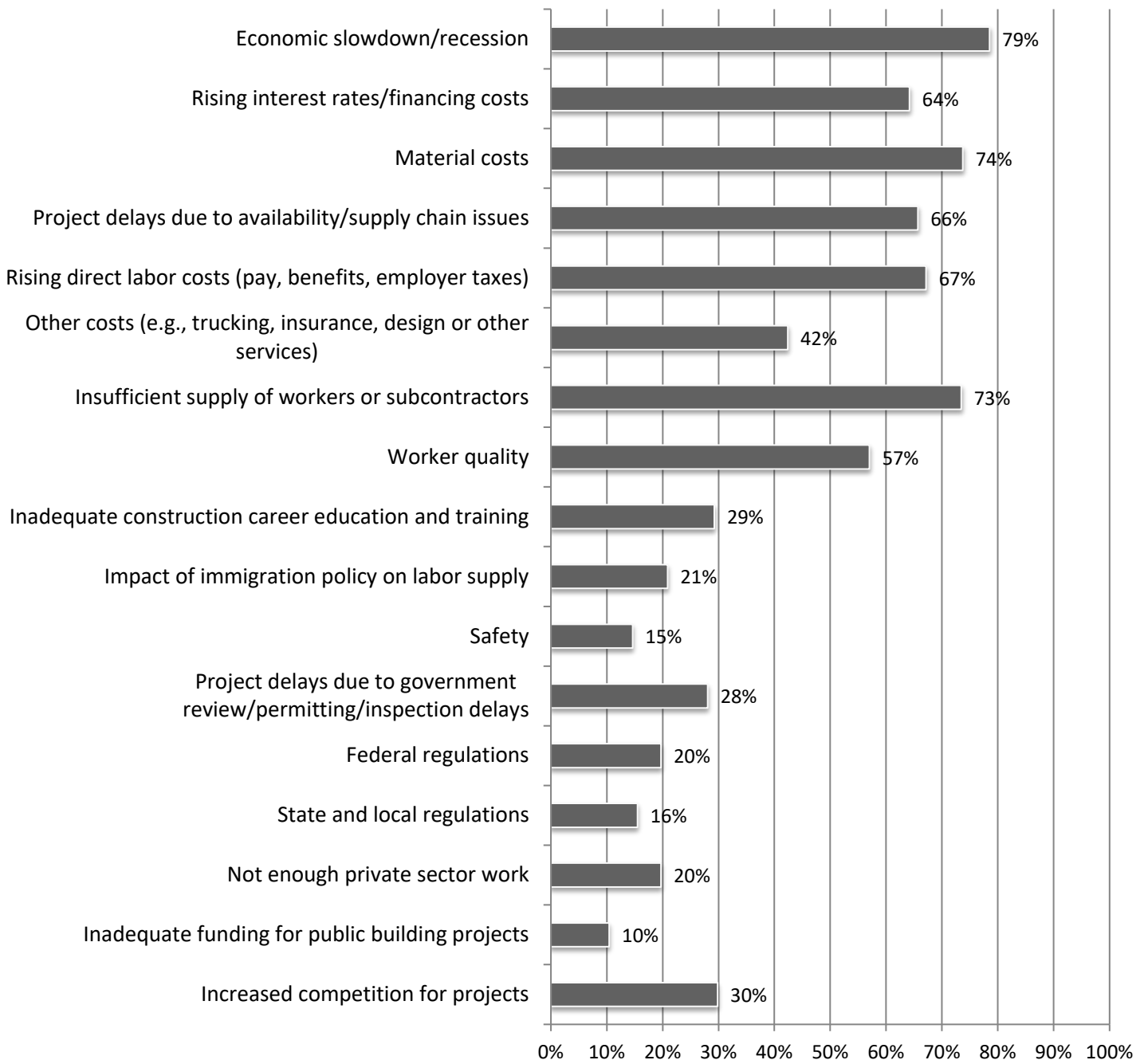
**9. Did an owner postpone or cancel any projects that were scheduled to start in 2022 or 2023? (mark all that apply) Responses: 334**



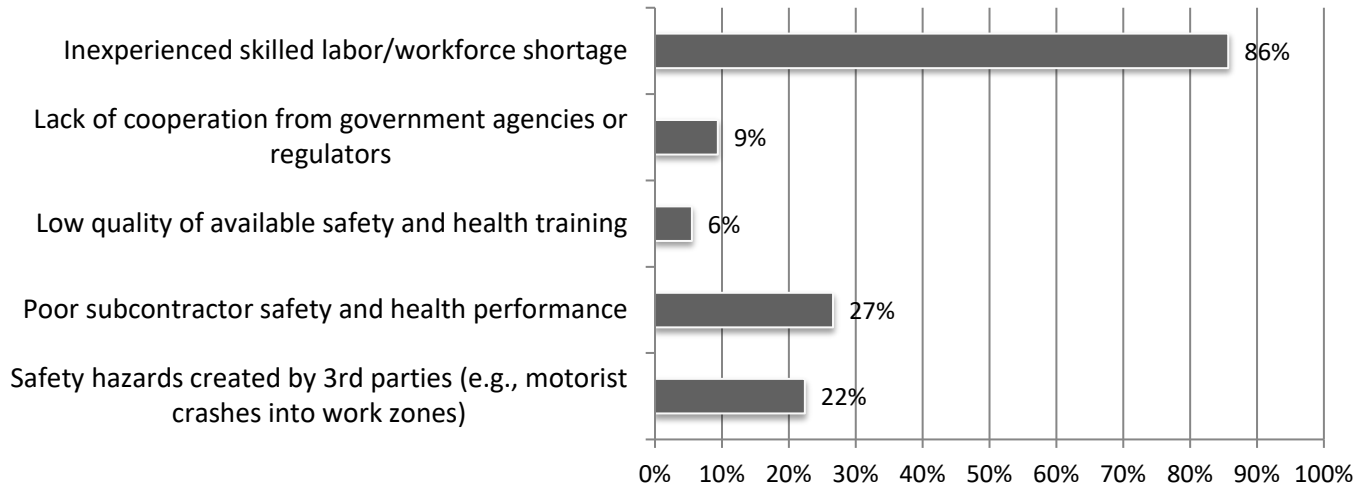
**10. If projects were postponed or canceled, what was the main reason? Responses: 260**



**11. What are your biggest concerns for 2023? (mark all that apply) Responses: 335**



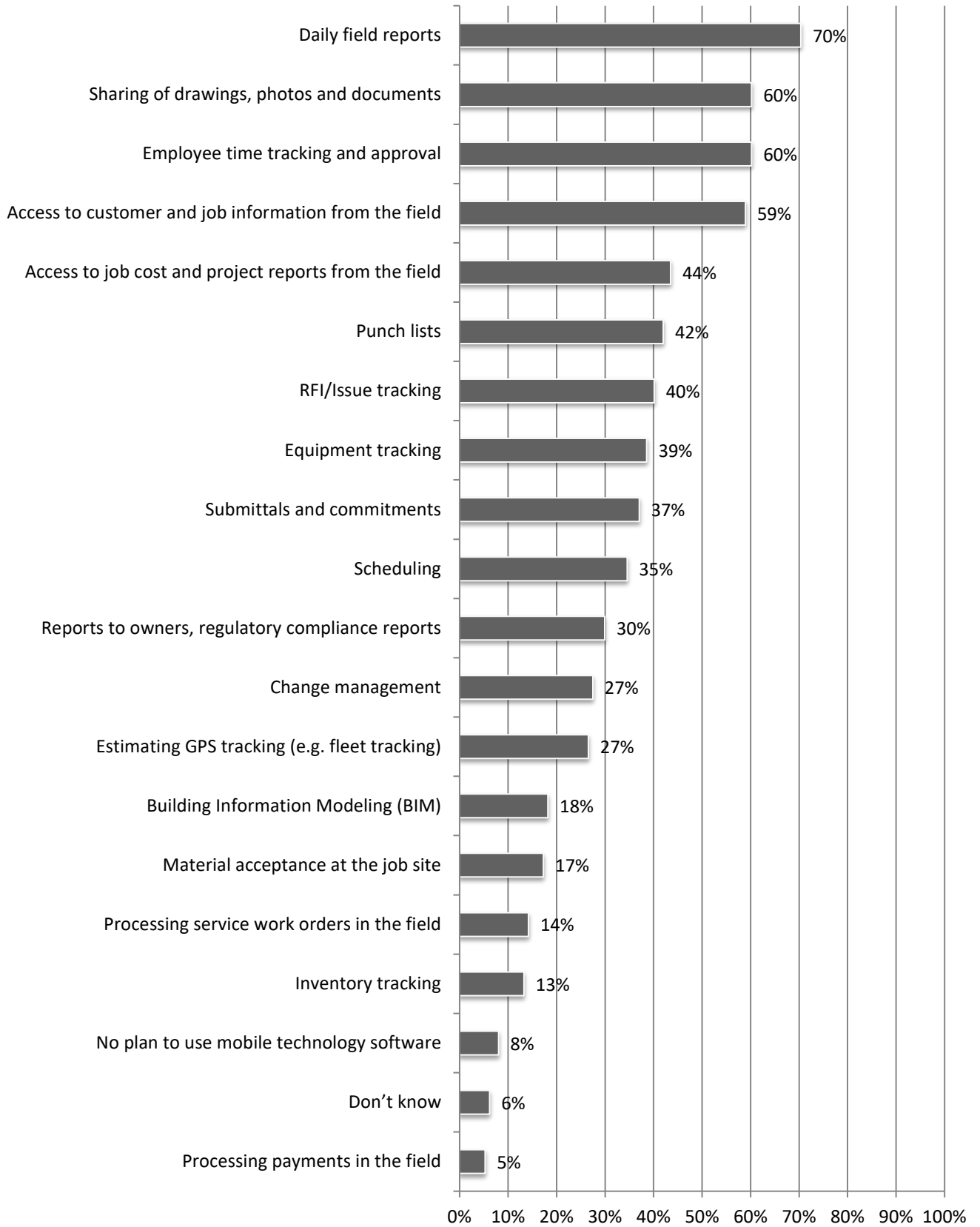
**12. What challenges, if any, do you see regarding the safety and health of your firm's workers? (mark all that apply) Responses: 308**



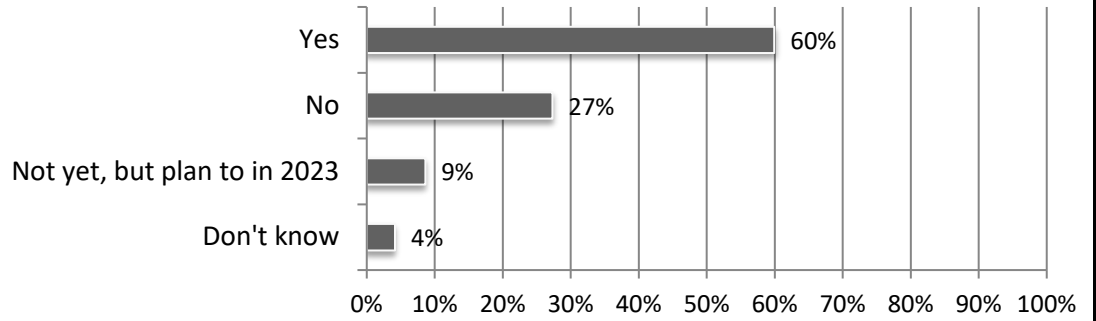
**13. Compared to 2022, will your firm's 2023 investment in the following technologies change? (mark all that apply) Responses: 330**

	Increase	Decrease	No change
Document management software	27%	1%	72%
Accounting software	24%	3%	73%
Estimating software	21%	1%	78%
Project management software	20%	3%	77%
Building Information Modeling (BIM)	20%	1%	79%
Tool/asset management/tracking	19%	1%	80%
Human resources (HR) software	18%	2%	80%
Fleet tracking/management software	17%	2%	81%
Scheduling software	16%	1%	83%
Payroll software	16%	2%	82%
Client relationship management (CRM) software	15%	2%	83%
Project collaboration software	10%	2%	88%
Subcontractor bid management/ITB software	9%	1%	89%
Service management software	7%	2%	92%
Prequalification software	7%	1%	92%

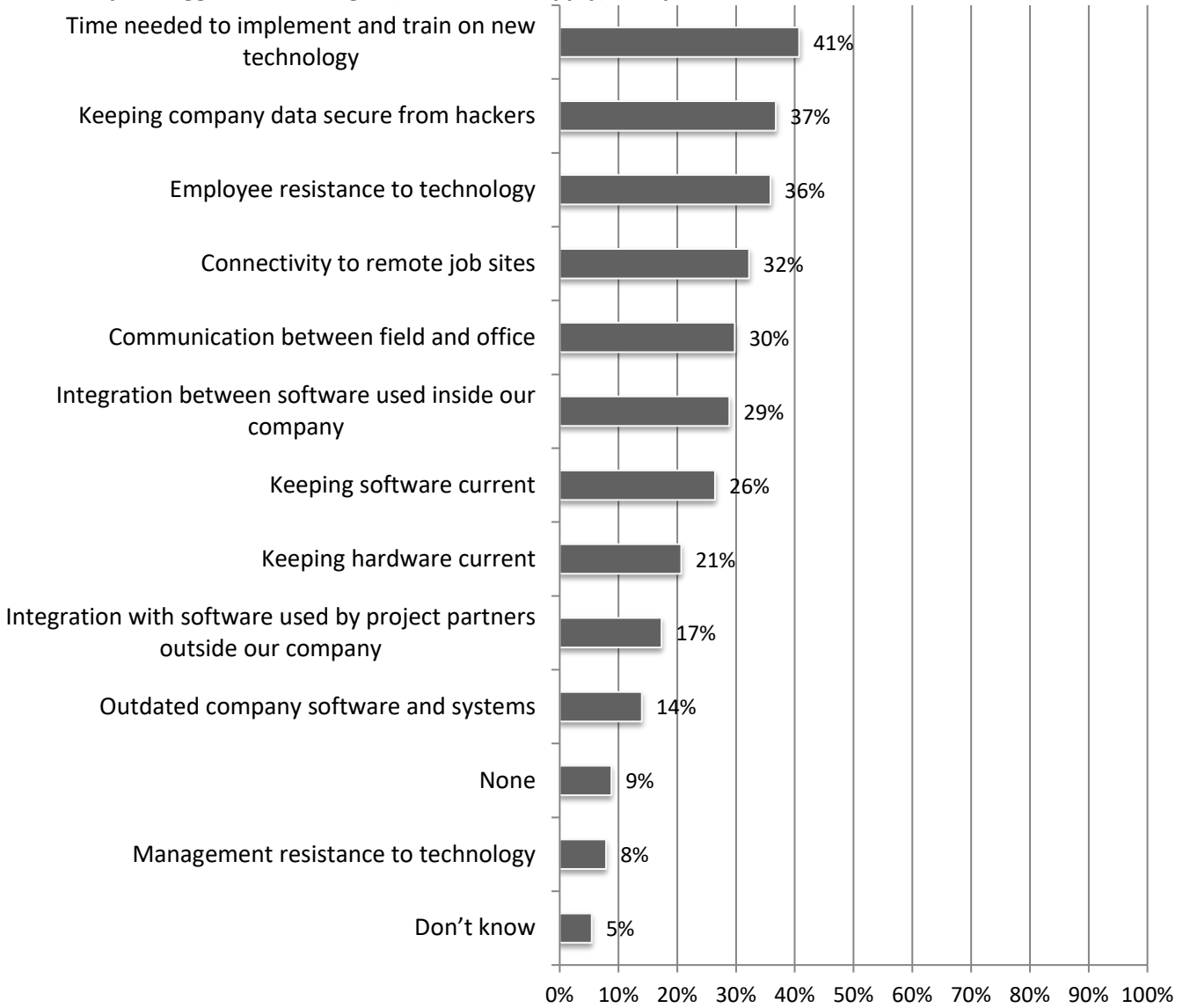
14. How does your company plan to use mobile software technology? (mark all that apply) Responses: 324



**15. Does your firm currently have a formal IT plan to support your business objectives? Responses: 337**



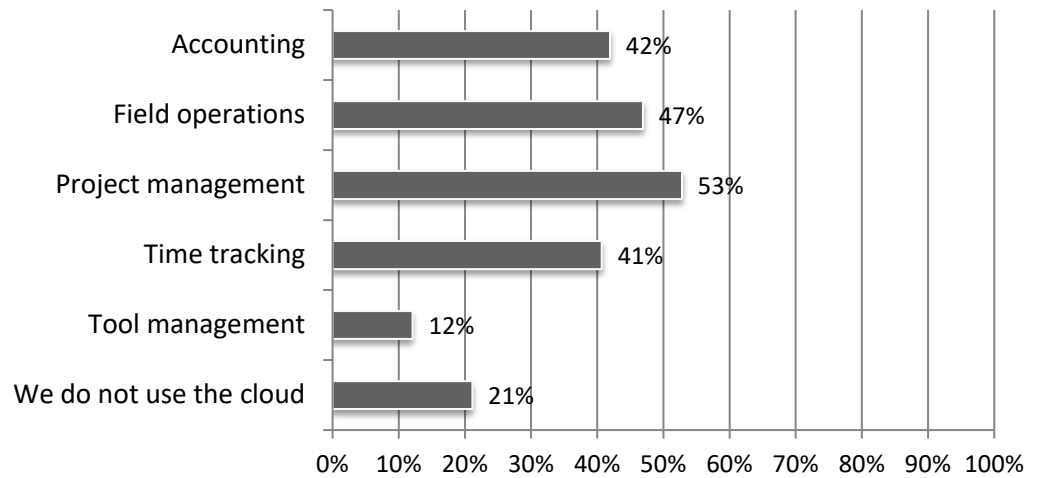
**16. What are your biggest IT challenges (mark all that apply)? Responses: 329**



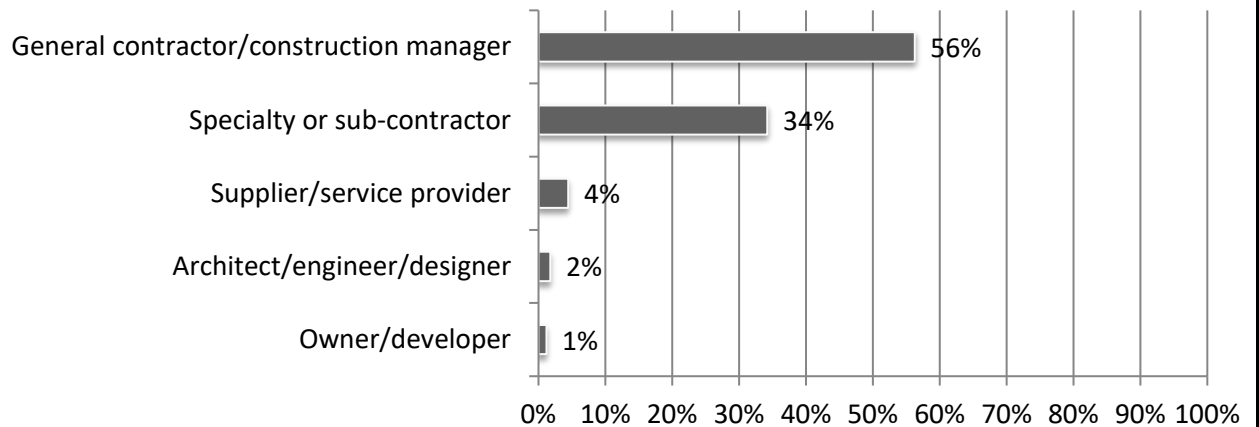


**17. Does your firm use cloud-hosted technology in any of the following ways (mark all that apply)?**

Responses: 322

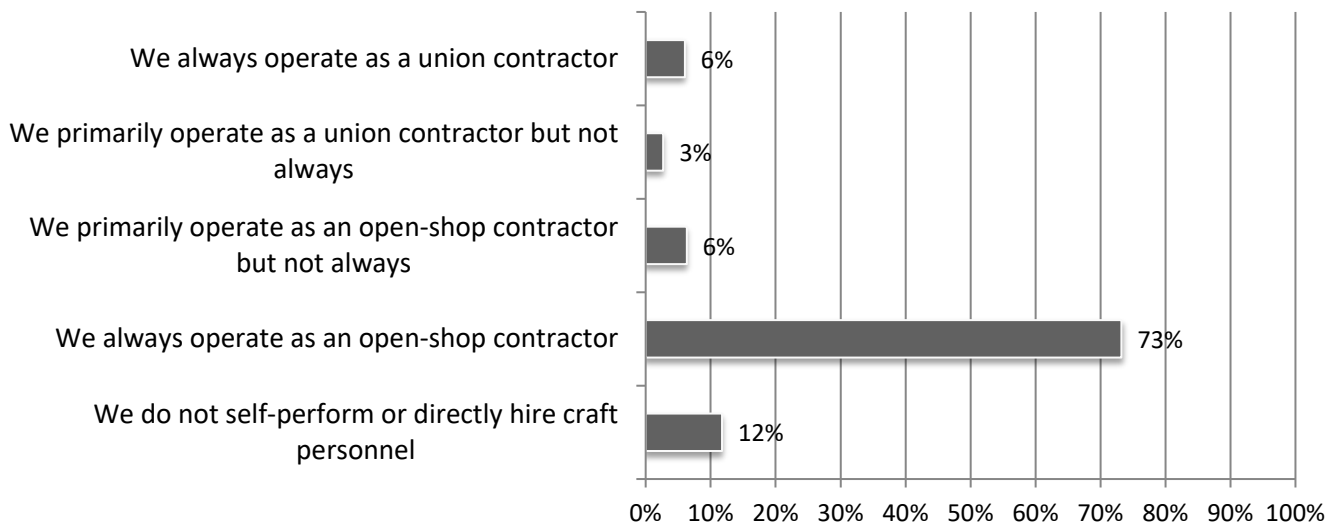


**18. What best describes your firm? Responses: 336**

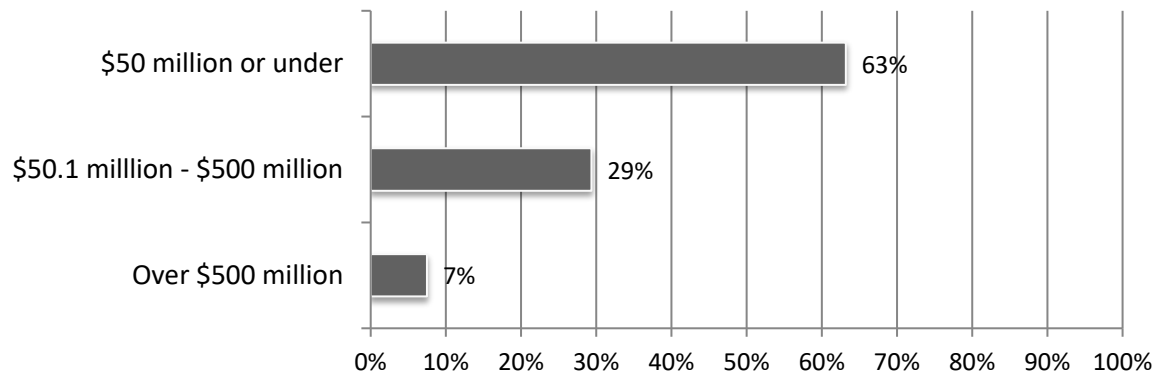


**19. When you self-perform construction work, do you operate as a union contractor or an open-shop contractor?**

Responses: 332



**20. Estimate the total dollar amount of work your firm performed in 2022. Responses: 334**



**21. How many total employees does your firm employ at all of its locations? Responses: 335**

