



## 2023 Construction Outlook Tennessee Survey Results

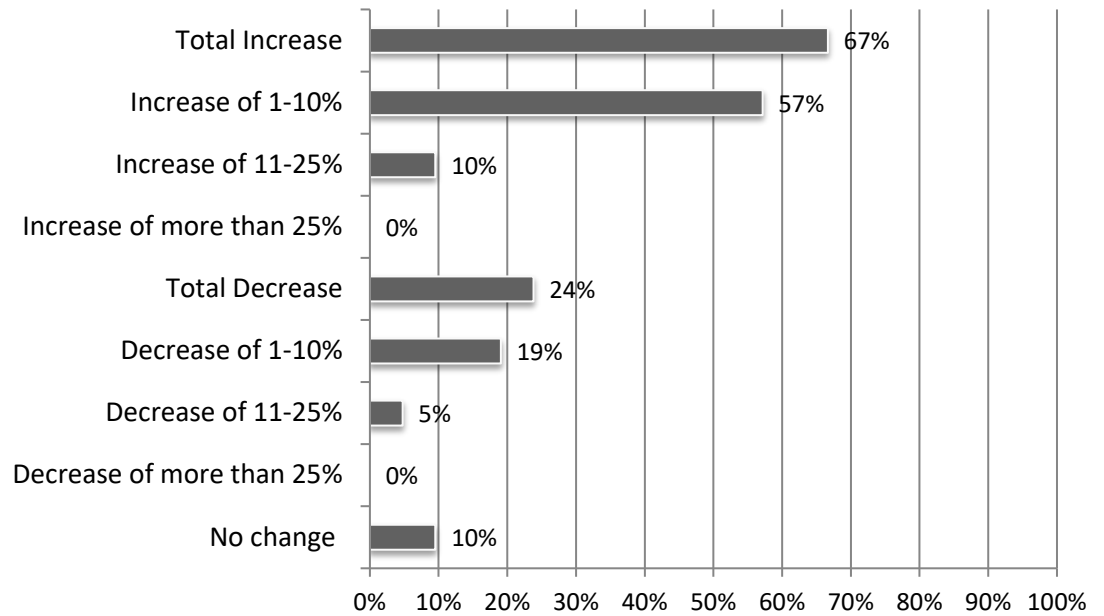
*Total Responses: 21. Responses varied for some questions. Percentages are based on responses to each question and may not sum to 100 due to rounding.*

- 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: 21**

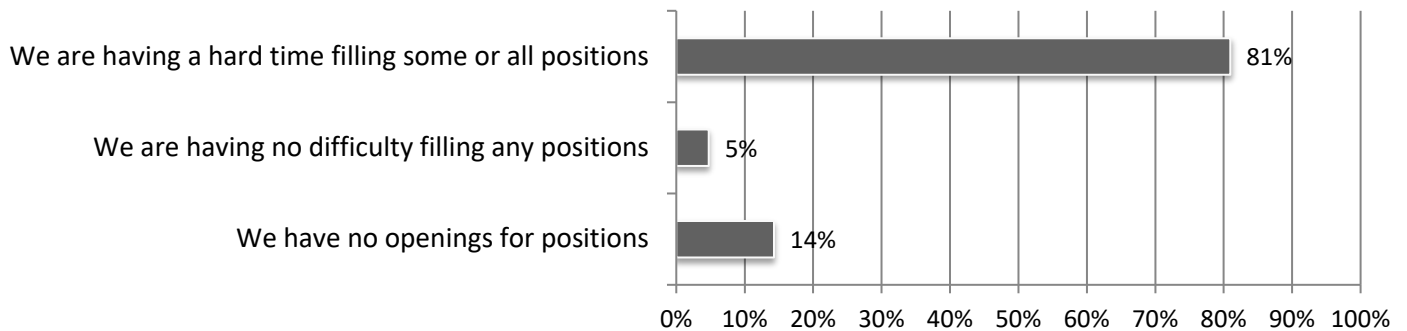
Market	Higher	Lower	Same	Net*	US Net
Water/Sewer	44%	13%	44%	31%	38%
Bridge/Highway	40%	27%	33%	13%	42%
Transportation (e.g., transit, rail, airport)	31%	25%	44%	6%	42%
Federal (e.g., VA, GSA, USACE, NAVFAC)	29%	24%	47%	6%	37%
Other Healthcare	29%	24%	47%	6%	28%
Public Building	29%	24%	47%	6%	23%
Warehouse	37%	32%	32%	5%	10%
K-12 School	20%	20%	60%	0%	16%
Manufacturing	33%	33%	33%	0%	14%
Multifamily Residential	26%	26%	47%	0%	1%
Hospital	25%	31%	44%	-6%	23%
Lodging	27%	33%	40%	-7%	-4%
Private Office	26%	37%	37%	-11%	-21%
Higher Education	24%	35%	41%	-12%	16%
Power	21%	36%	43%	-14%	28%
Retail	21%	37%	42%	-16%	-22%
Data Center	31%	50%	19%	-19%	12%
Other	0%	67%	33%	-67%	10%

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

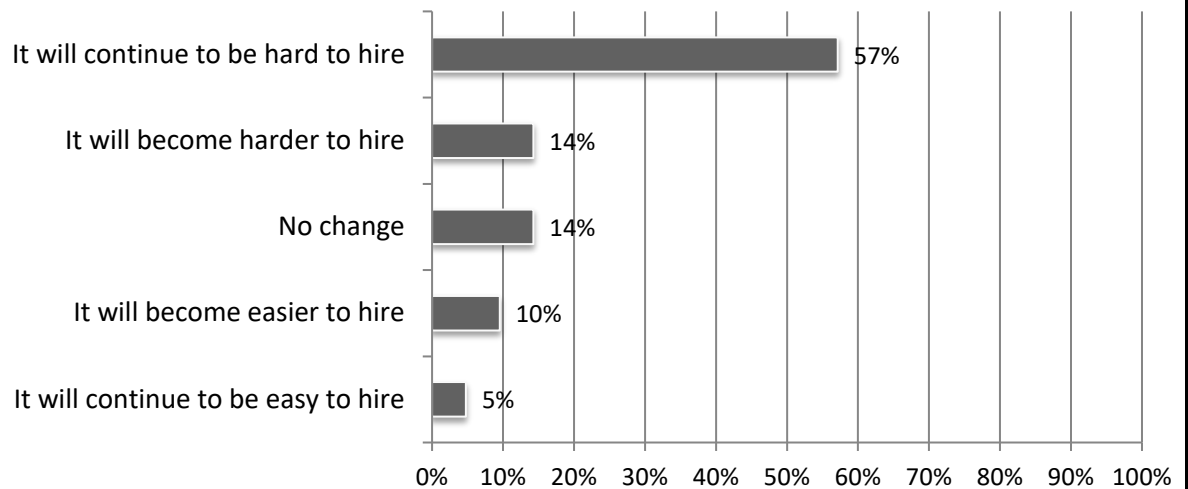
**2. What percent change do you expect in your headcount in 2023? Responses: 21**



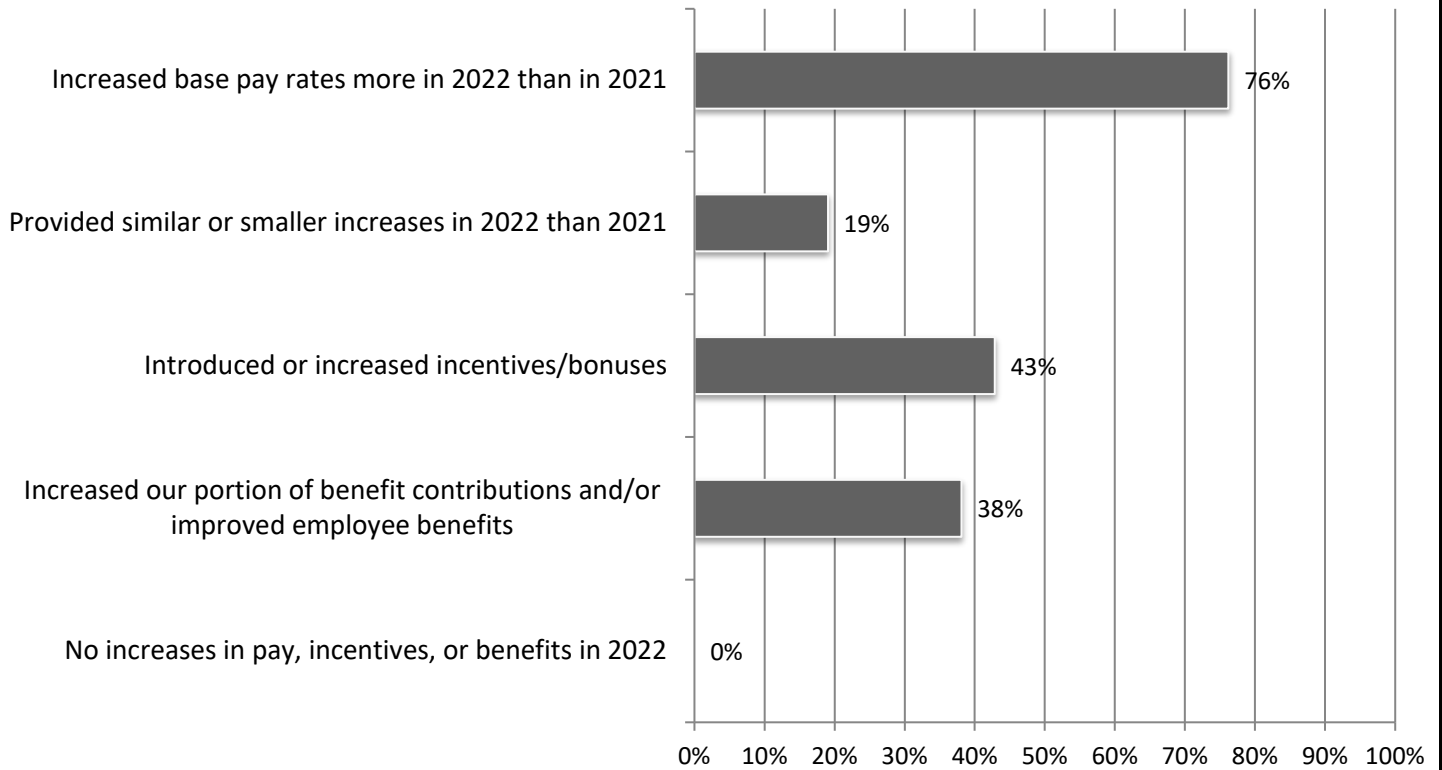
**3. How would you describe your current situation in filling salaried and hourly craft positions? Responses: 21**



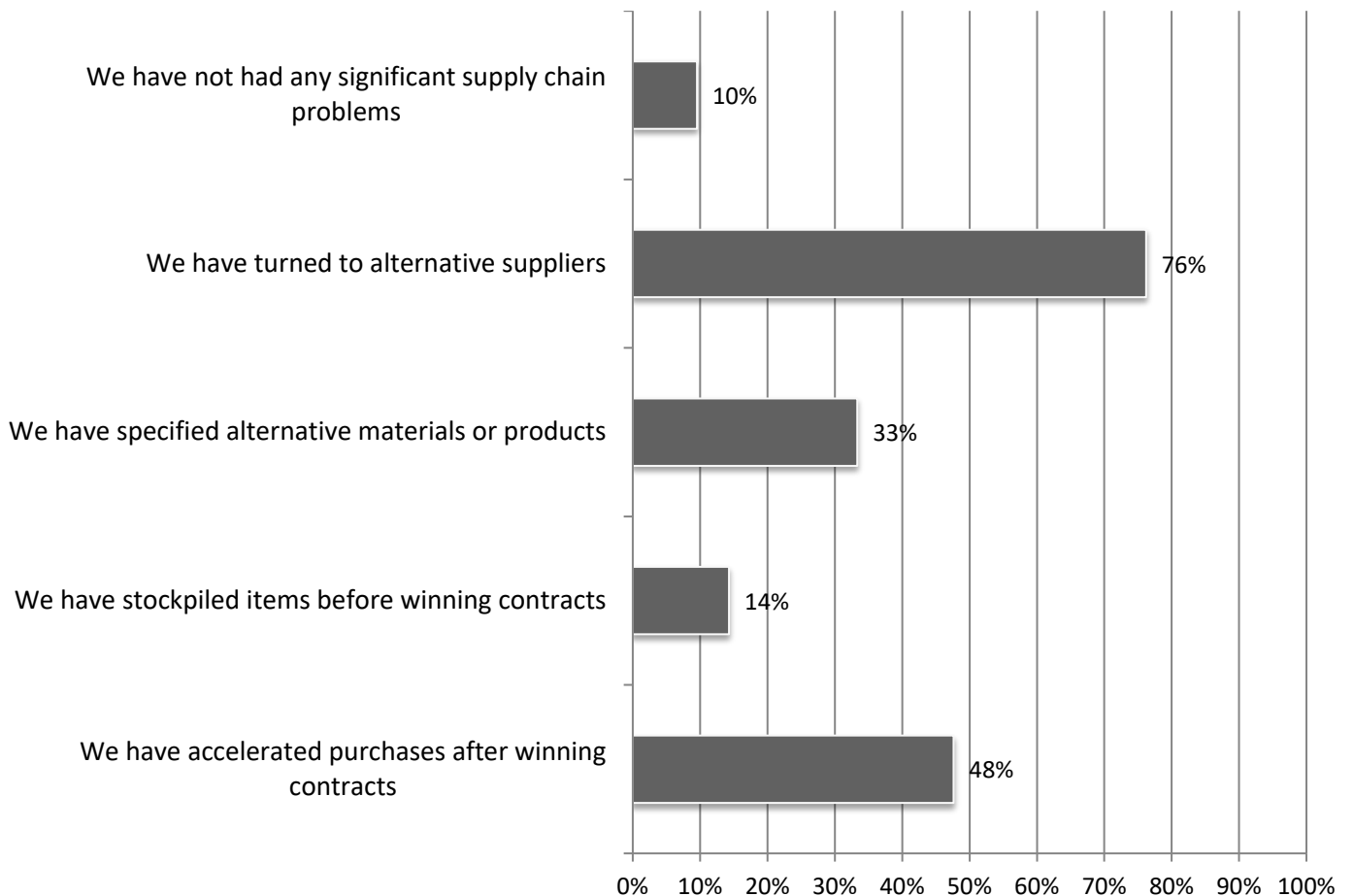
**4. Do you expect any changes in the availability of hourly craft or salaried personnel over the coming 12 months? Responses: 21**



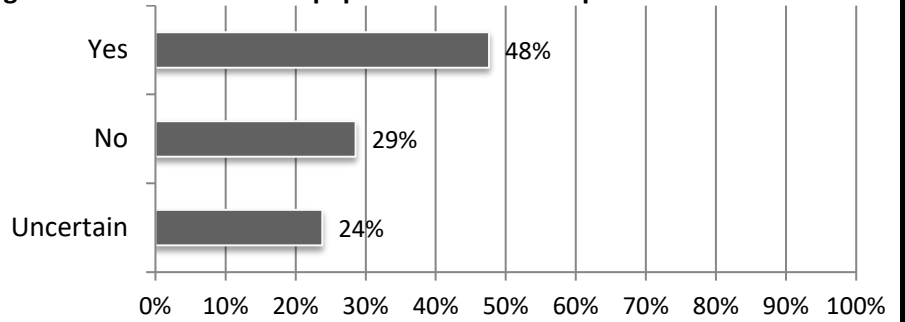
**5. What changes did your firm make in pay or benefits in 2022? (mark all that apply) Responses: 21**



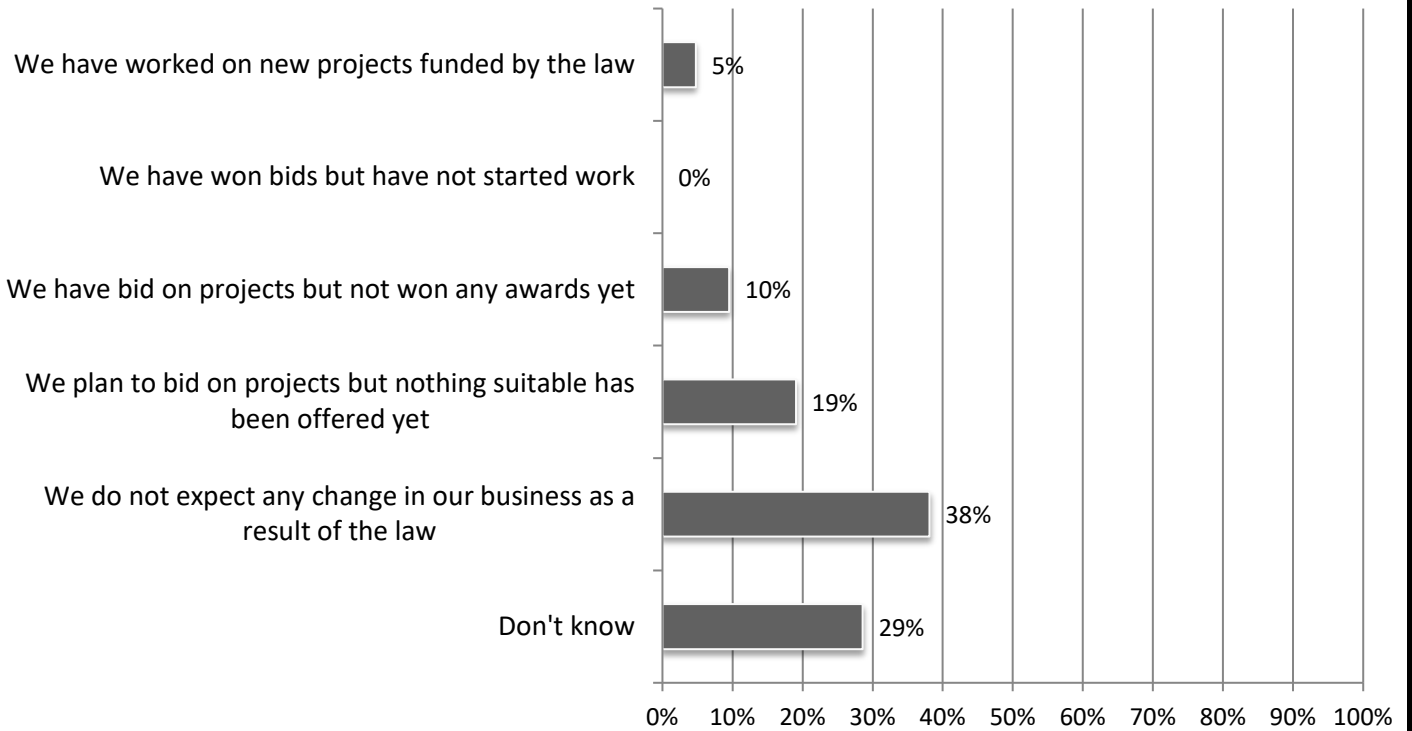
**6. How has your firm responded to supply-chain issues in 2022, if any? (mark all that apply) Responses: 21**



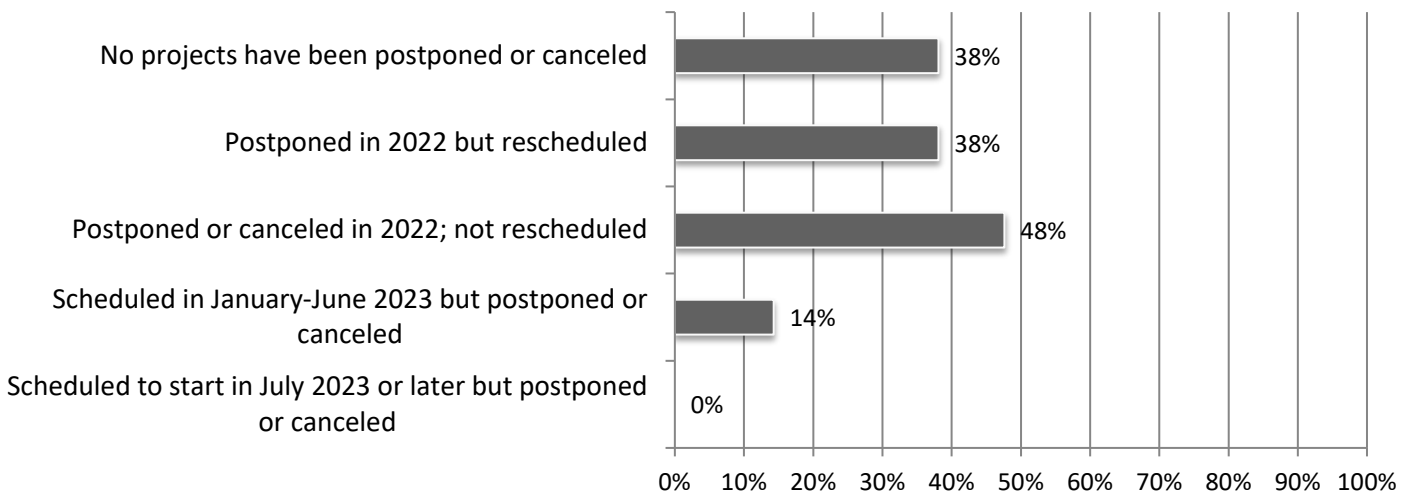
**7. Do you anticipate purchasing/leasing new work vehicles or equipment in 2023? Responses: 21**



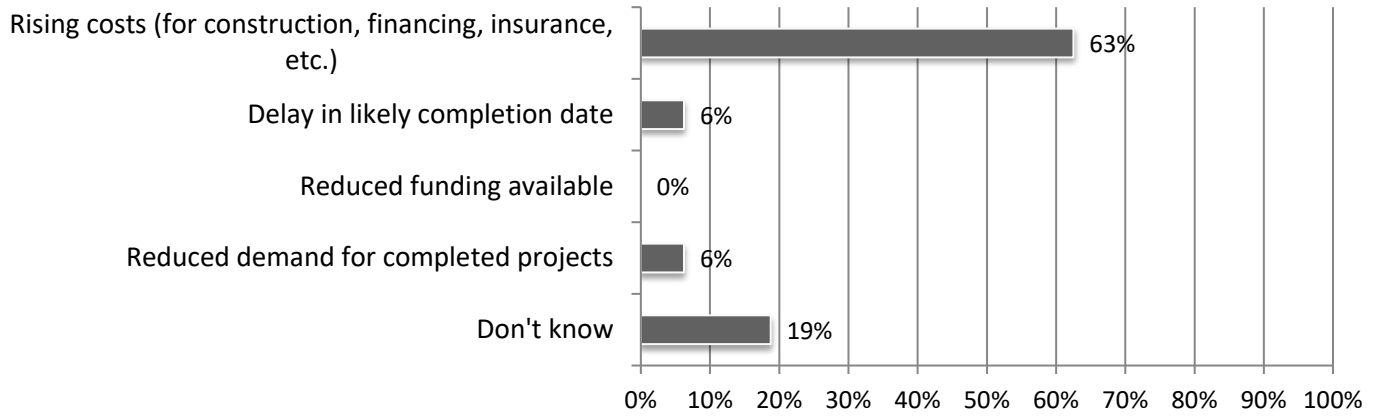
**8. What difference, if any, has the Infrastructure Investment and Jobs Act of 2021 (the "Bipartisan Infrastructure Law") made to your business? Responses: 21**



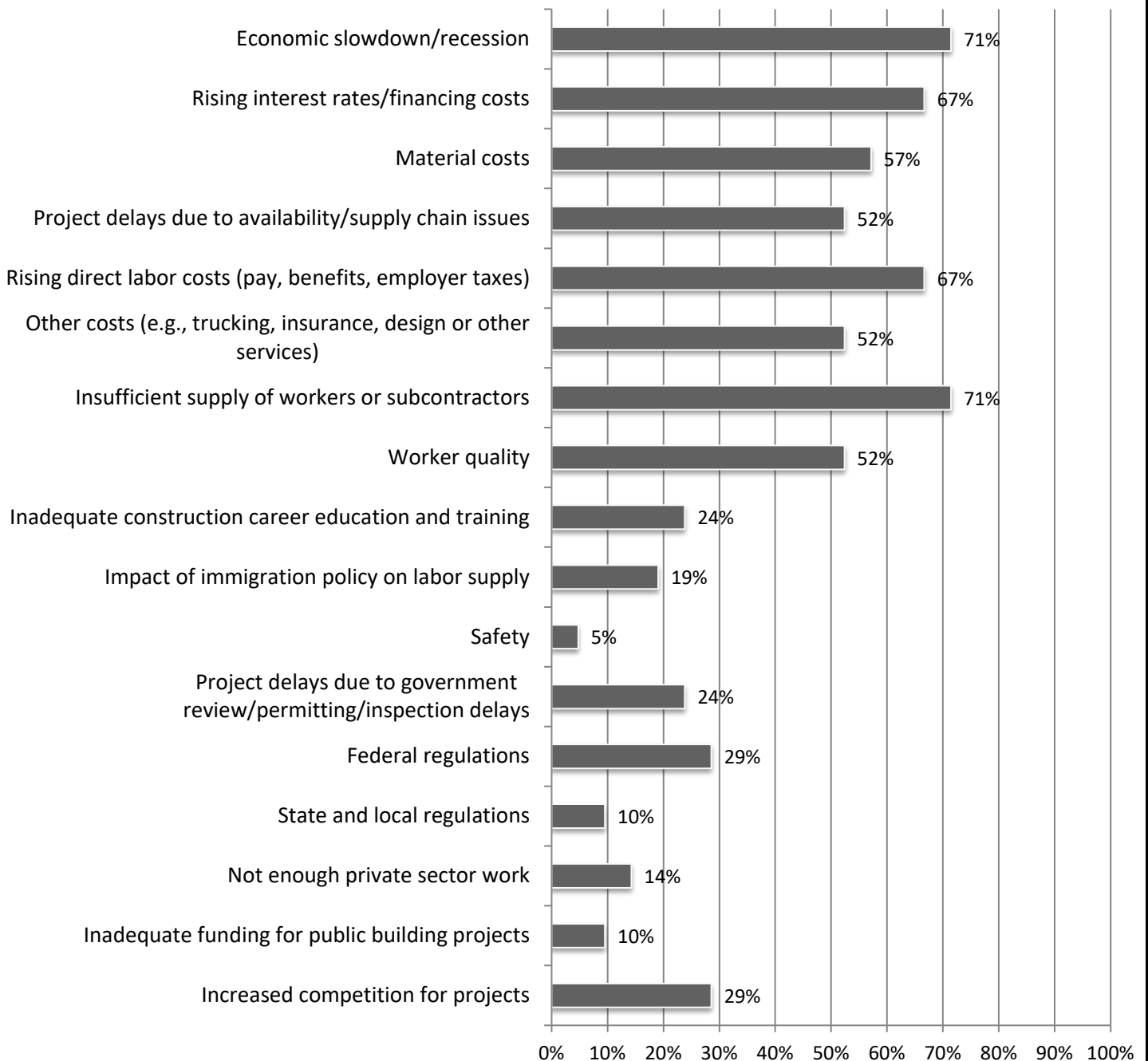
**9. Did an owner postpone or cancel any projects that were scheduled to start in 2022 or 2023? (mark all that apply) Responses: 21**



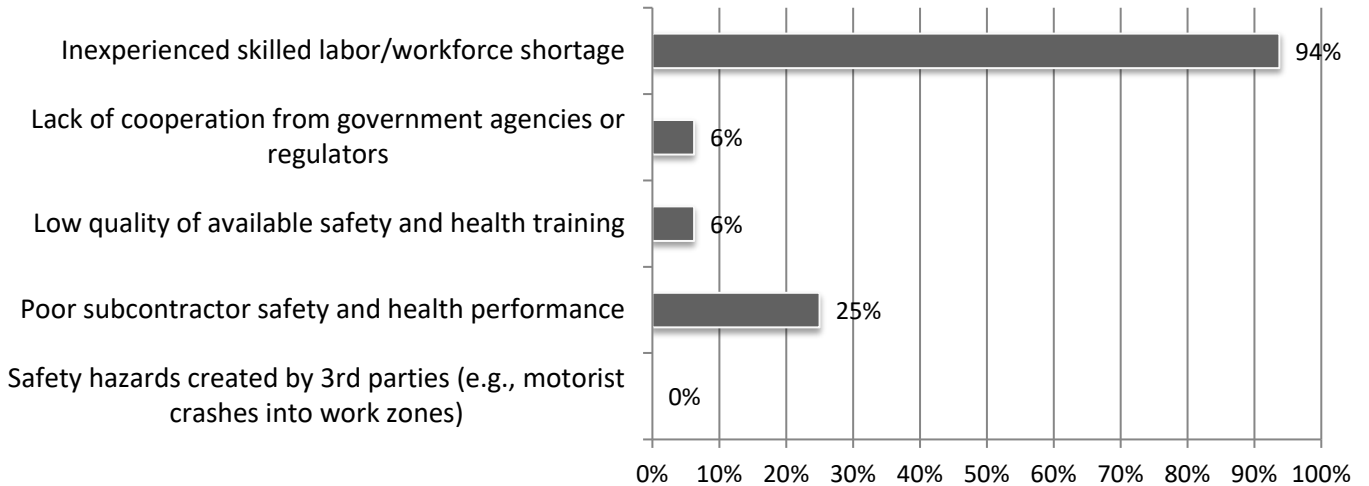
**10. If projects were postponed or canceled, what was the main reason? Responses: 16**



**11. What are your biggest concerns for 2023? (mark all that apply) Responses: 21**



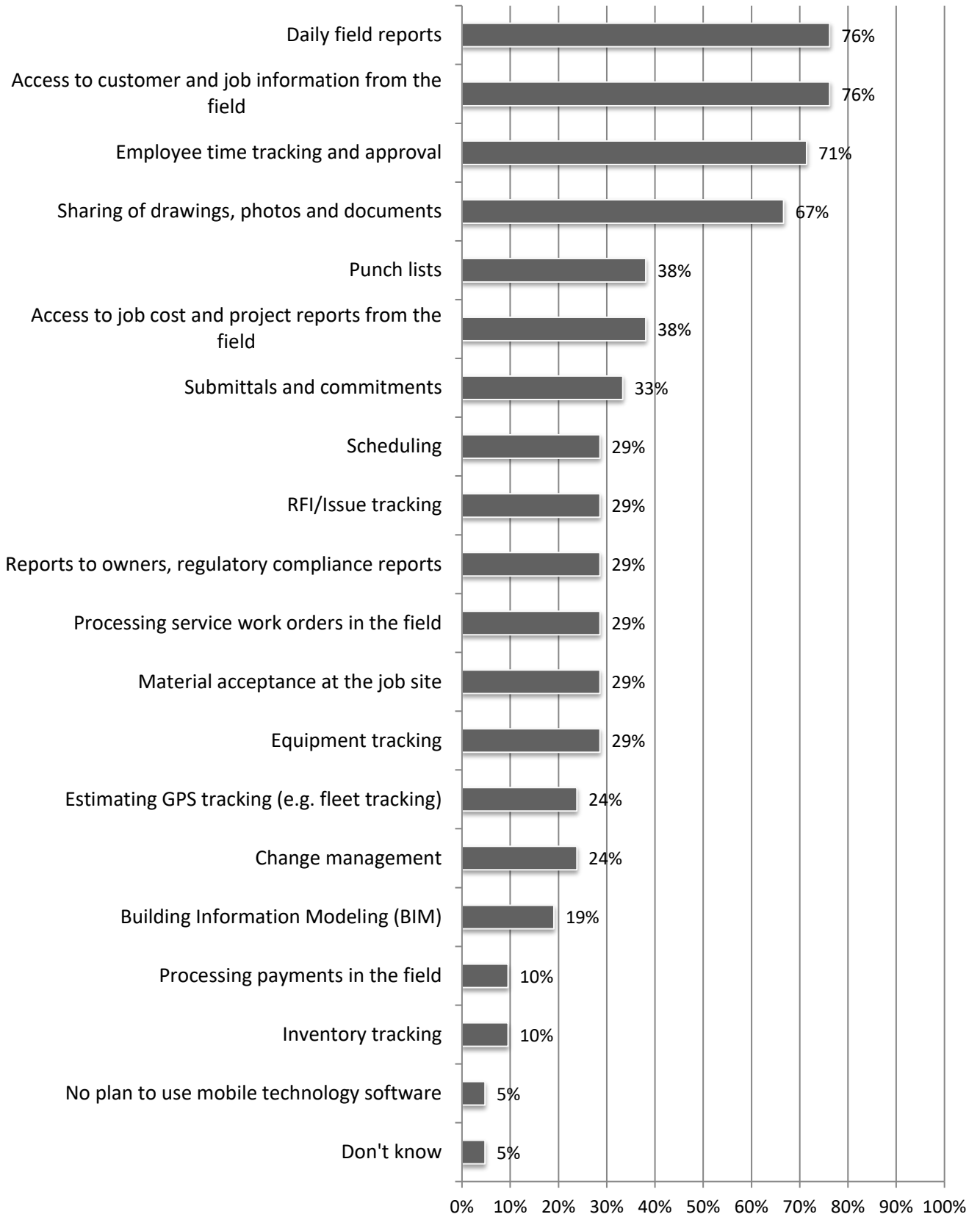
**12. What challenges, if any, do you see regarding the safety and health of your firm's workers? (mark all that apply) Responses: 16**



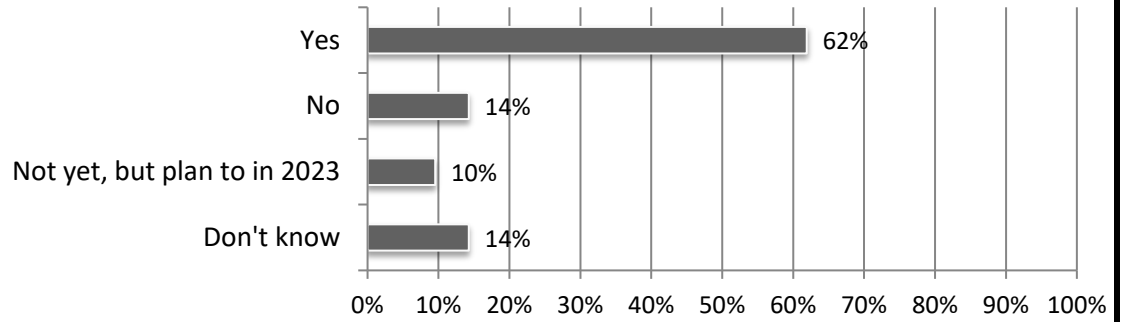
**13. Compared to 2022, will your firm's 2023 investment in the following technologies change? (mark all that apply) Responses: 21**

	Increase	Decrease	No change
Document management software	37%	5%	58%
Estimating software	26%	0%	74%
Tool/asset management/tracking	24%	0%	76%
Project management software	22%	6%	72%
Scheduling software	22%	0%	78%
Fleet tracking/management software	20%	10%	70%
Service management software	18%	0%	82%
Subcontractor bid management/ITB software	18%	0%	82%
Payroll software	14%	5%	81%
Building Information Modeling (BIM)	11%	0%	89%
Client relationship management (CRM) software	11%	16%	74%
Human resources (HR) software	10%	0%	90%
Accounting software	10%	10%	81%
Project collaboration software	6%	6%	89%
Prequalification software	5%	5%	89%

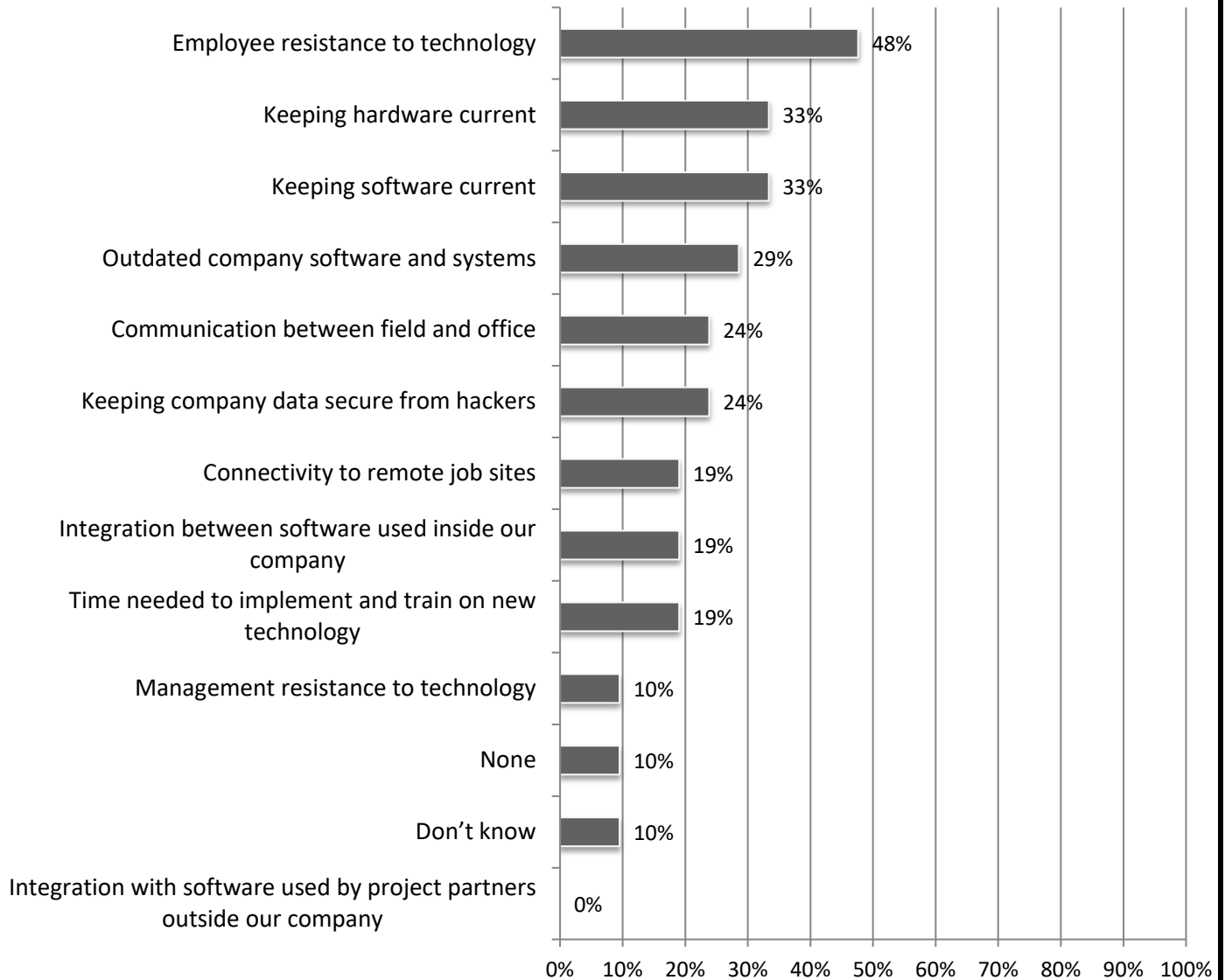
14. How does your company plan to use mobile software technology? (mark all that apply) Responses: 21



**15. Does your firm currently have a formal IT plan to support your business objectives? Responses: 21**



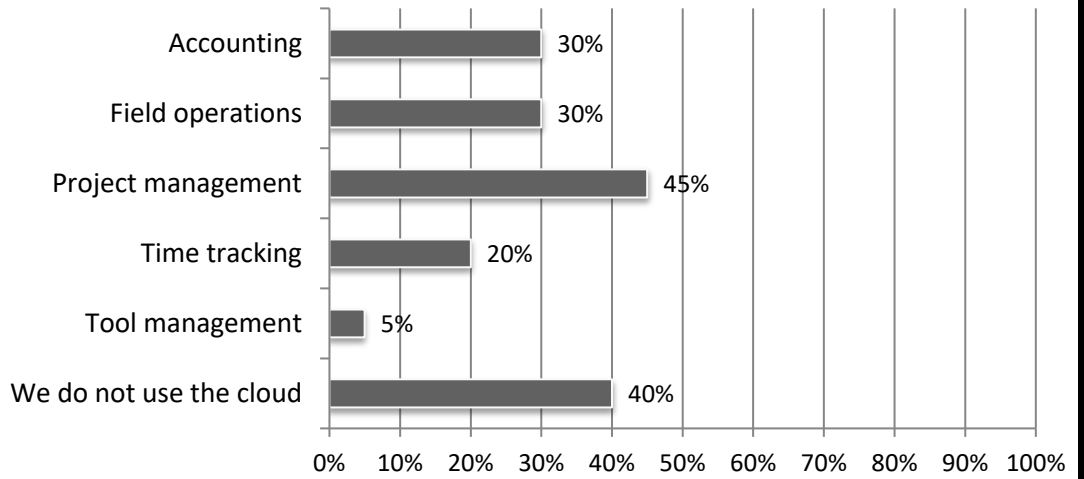
**16. What are your biggest IT challenges (mark all that apply)? Responses: 21**



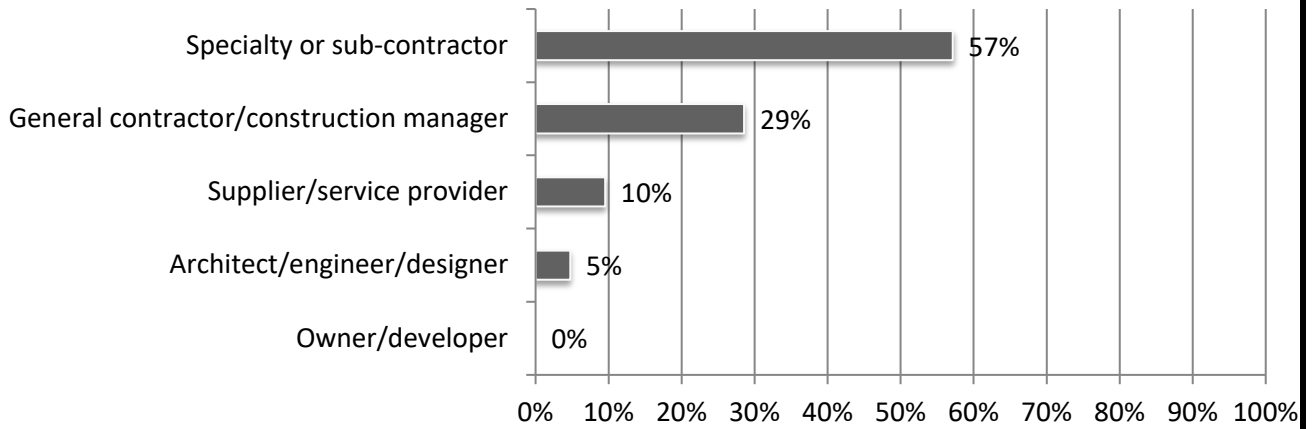


**17. Does your firm use cloud-hosted technology in any of the following ways (mark all that apply)?**

**Responses: 20**

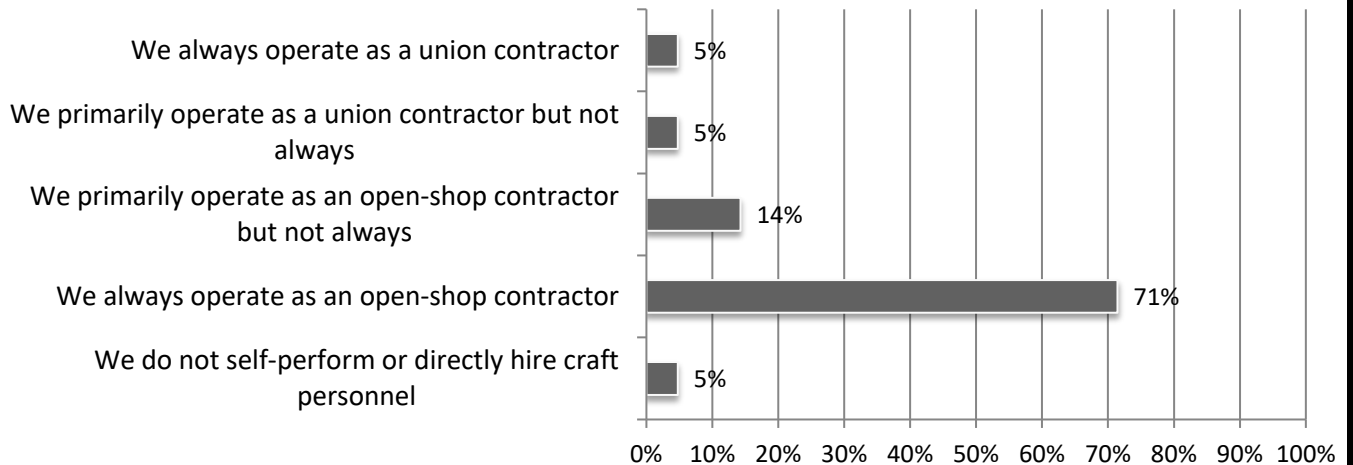


**18. What best describes your firm? Responses: 21**

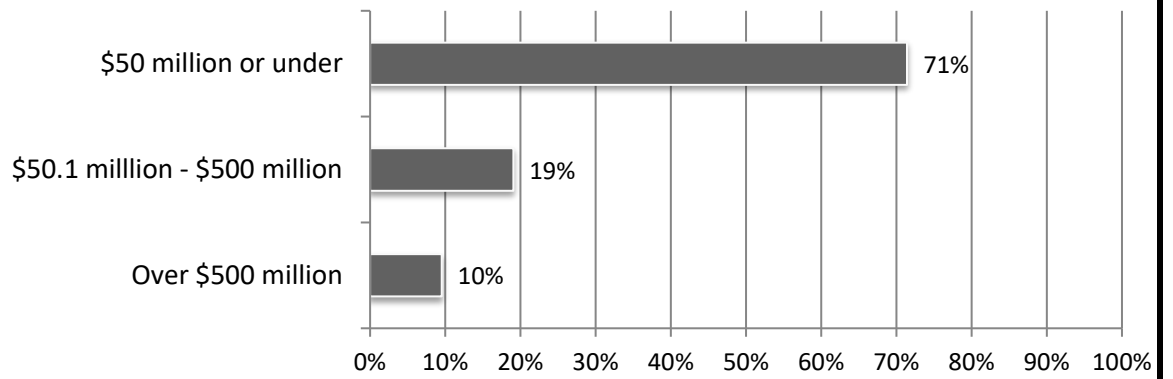


**19. When you self-perform construction work, do you operate as a union contractor or an open-shop contractor?**

**Responses: 21**



**20. Estimate the total dollar amount of work your firm performed in 2022. Responses: 21**



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

