



**AGC**  
THE CONSTRUCTION  
ASSOCIATION

**Sage**

## 2023 Construction Outlook West Survey Results

Total Responses: 305. Responses varied for some questions. Percentages are based on responses to each question and may not sum to 100 due to rounding.

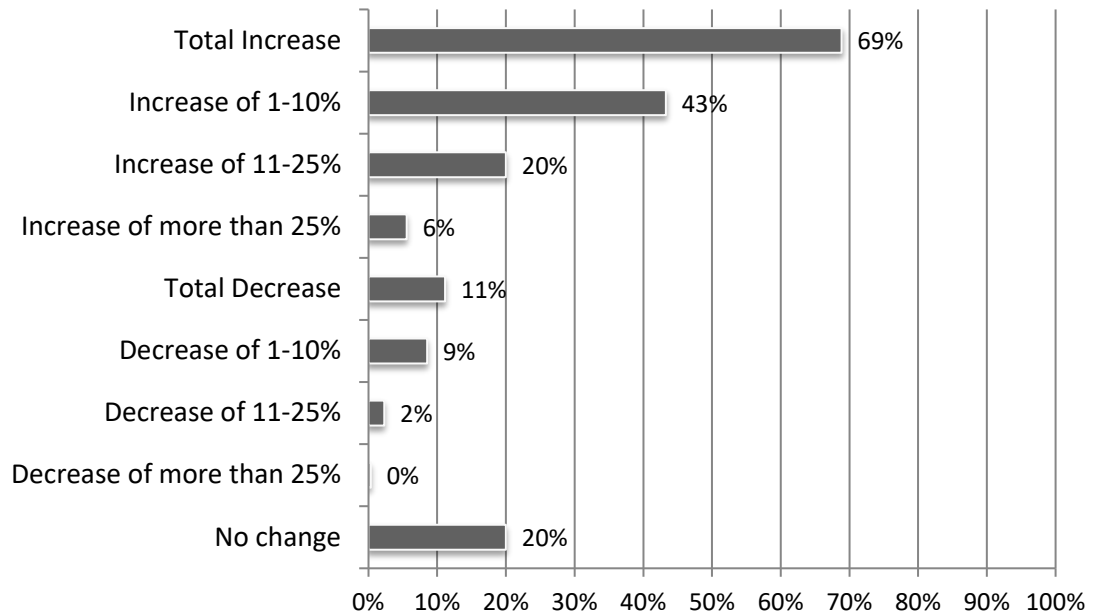
1. Compared to 2022, do you expect the available dollar value of projects you compete for in 2023 to be higher/lower/about the same? (answer for all market areas in which your business operates):

Responses: 303

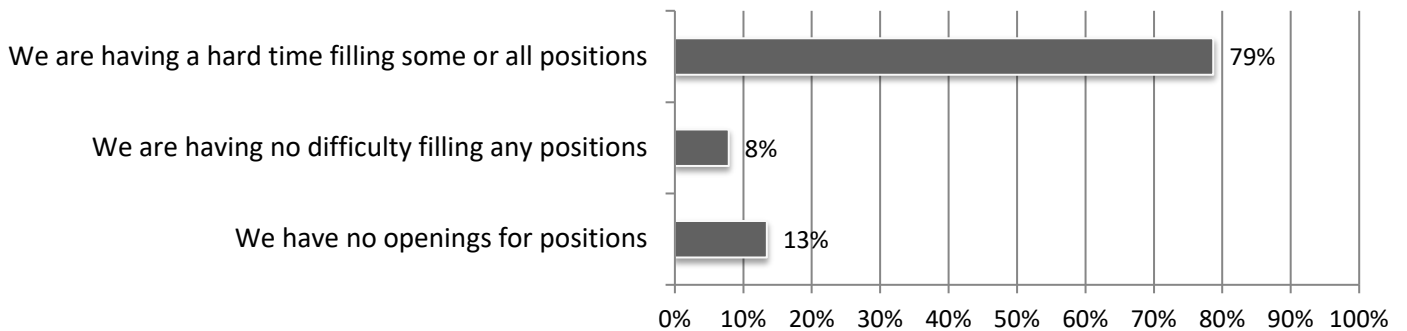
Market	Higher	Lower	Same	Net*	US Net
Transportation (e.g., transit, rail, airport)	53%	8%	38%	45%	42%
Bridge/Highway	46%	7%	48%	39%	42%
Power	48%	10%	42%	38%	28%
Federal (e.g., VA, GSA, USACE, NAVFAC)	49%	11%	40%	38%	37%
Water/Sewer	44%	10%	46%	33%	38%
Other Healthcare	44%	13%	43%	30%	28%
Hospital	37%	19%	44%	18%	23%
Public Building	35%	20%	45%	15%	23%
Higher Education	36%	22%	42%	14%	16%
K-12 School	36%	24%	40%	12%	16%
Other	25%	14%	60%	11%	10%
Data Center	33%	22%	45%	11%	12%
Manufacturing	33%	24%	42%	9%	14%
Multifamily Residential	35%	30%	35%	5%	1%
Warehouse	31%	26%	42%	5%	10%
Lodging	29%	30%	41%	-1%	-4%
Private Office	20%	43%	36%	-23%	-21%
Retail	15%	46%	39%	-31%	-22%

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

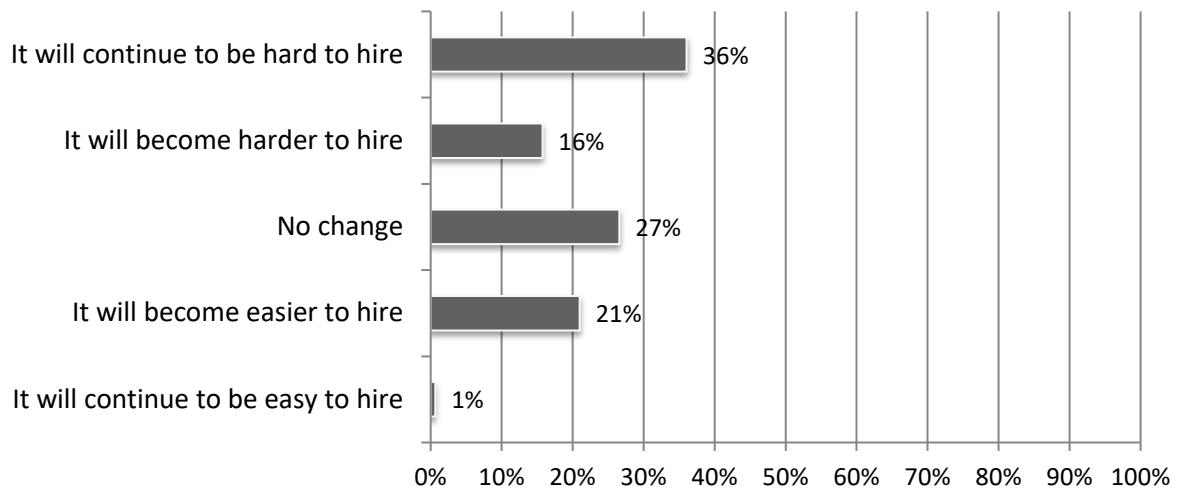
**2. What percent change do you expect in your headcount in 2023? Responses: 305**



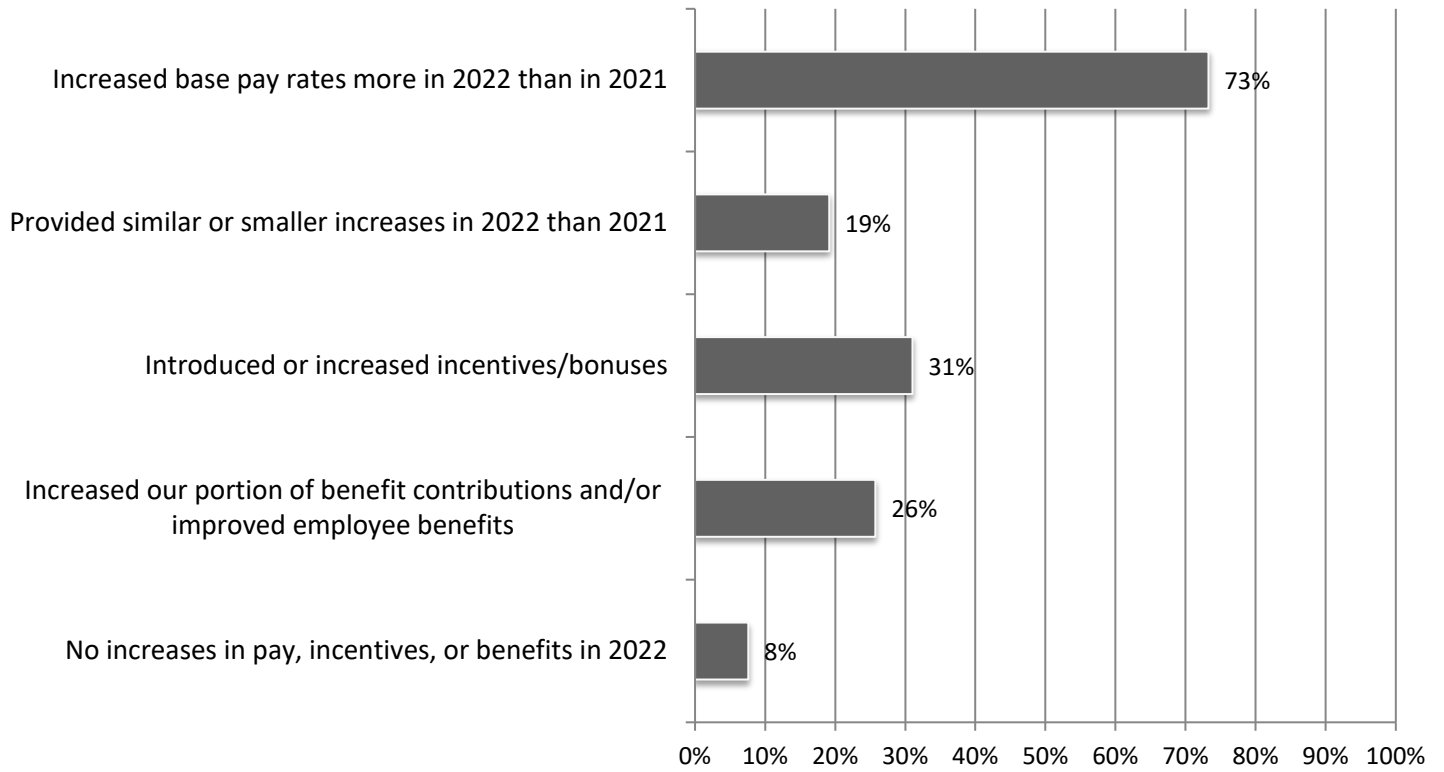
**3. How would you describe your current situation in filling salaried and hourly craft positions? Responses: 305**



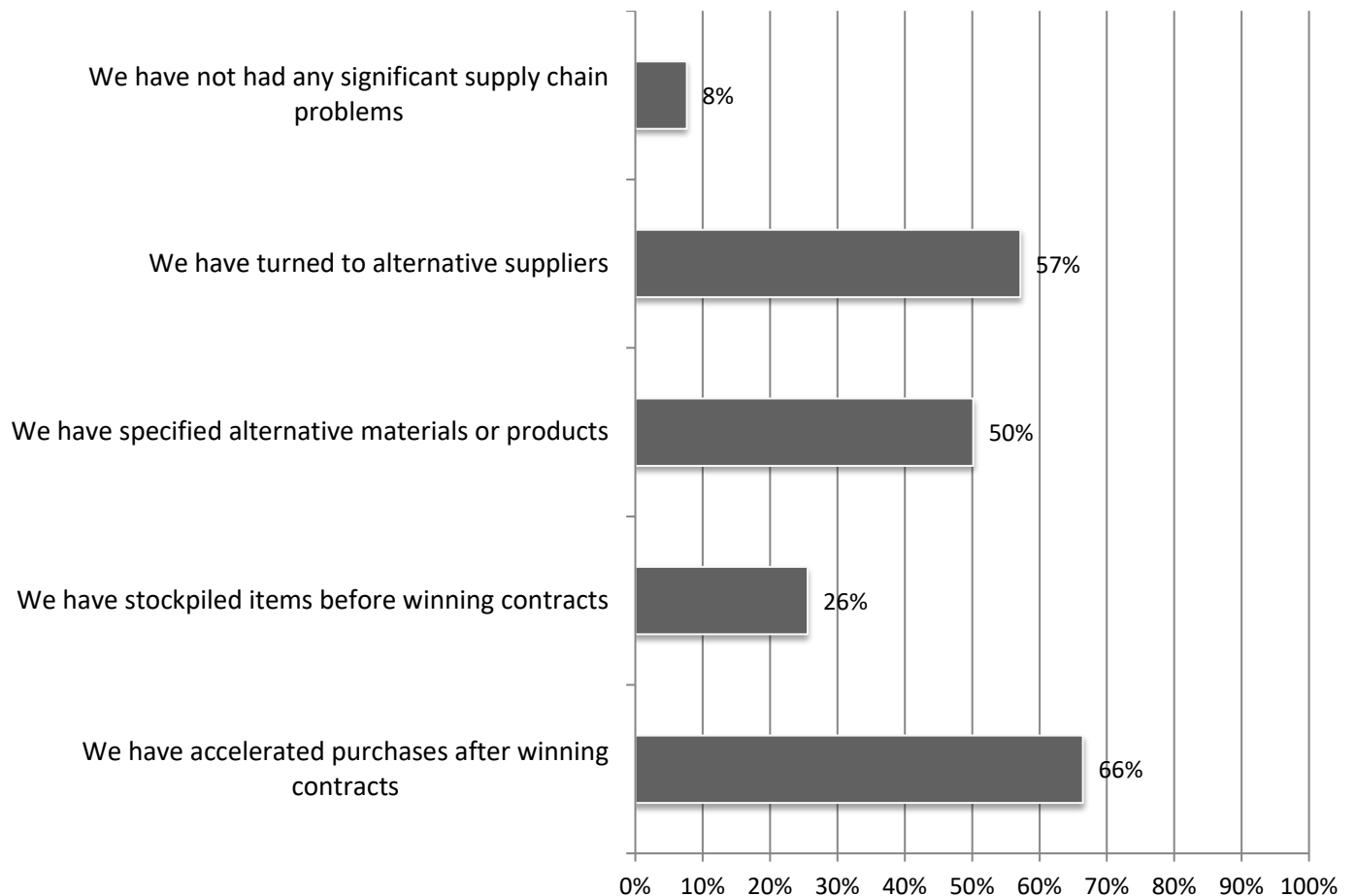
**4. Do you expect any changes in the availability of hourly craft or salaried personnel over the coming 12 months? Responses: 305**



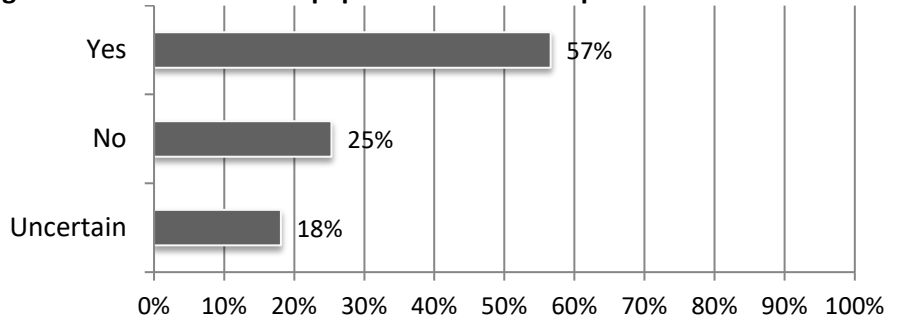
**5. What changes did your firm make in pay or benefits in 2022? (mark all that apply) Responses: 303**



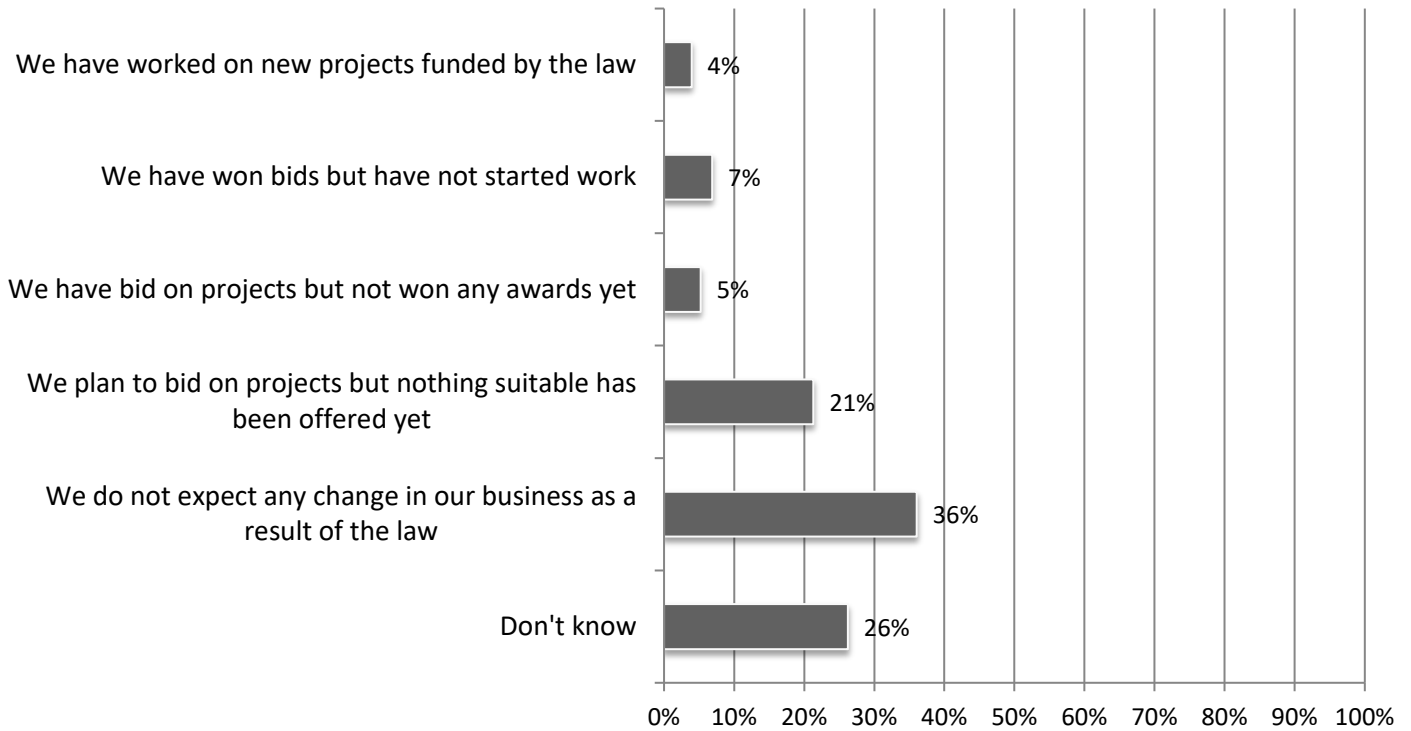
**6. How has your firm responded to supply-chain issues in 2022, if any? (mark all that apply) Responses: 301**



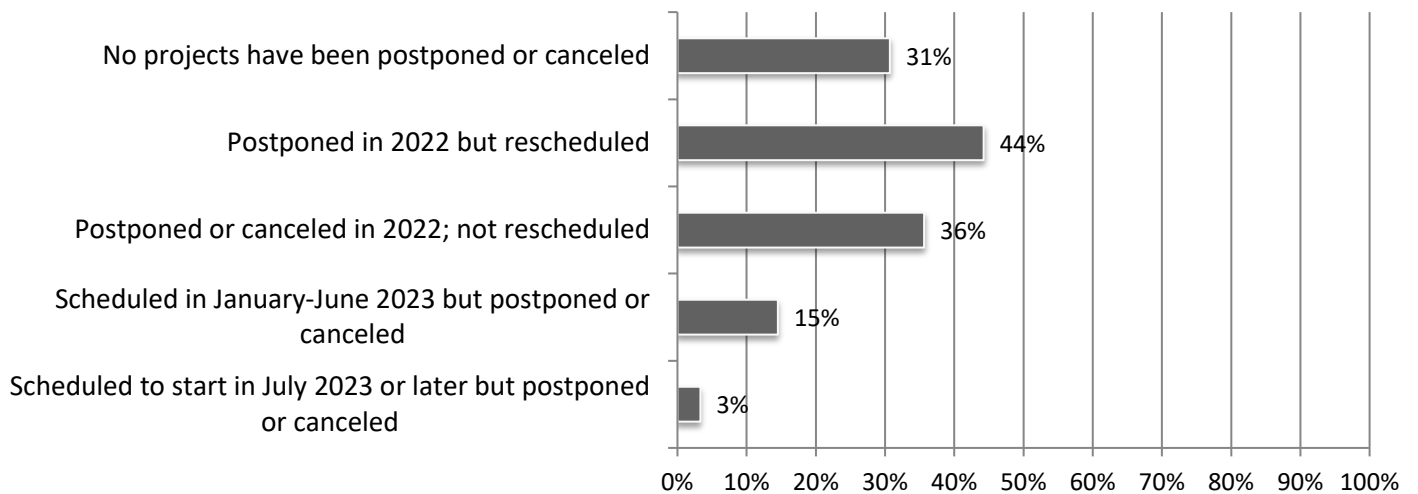
**7. Do you anticipate purchasing/leasing new work vehicles or equipment in 2023? Responses: 304**



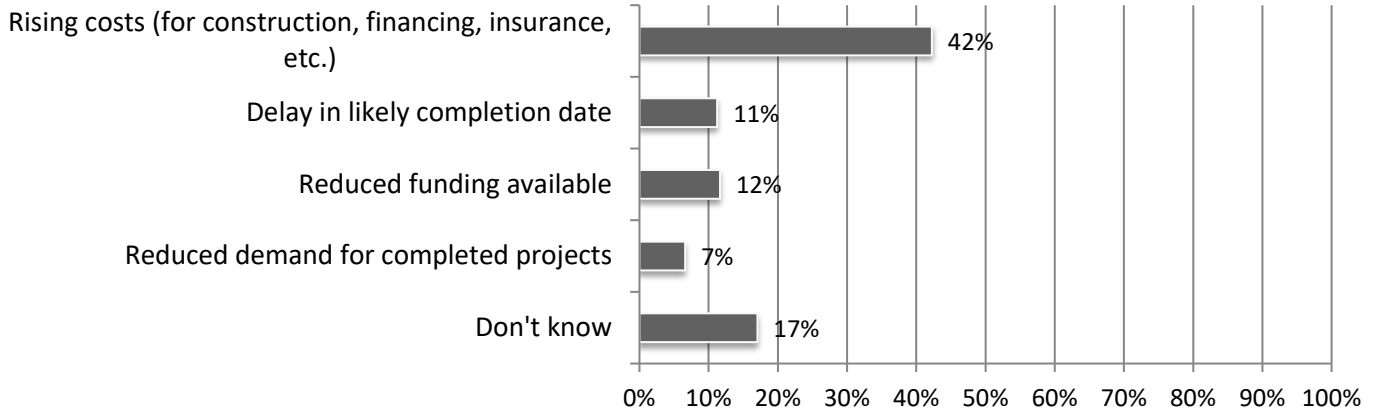
**8. What difference, if any, has the Infrastructure Investment and Jobs Act of 2021 (the "Bipartisan Infrastructure Law") made to your business? Responses: 305**



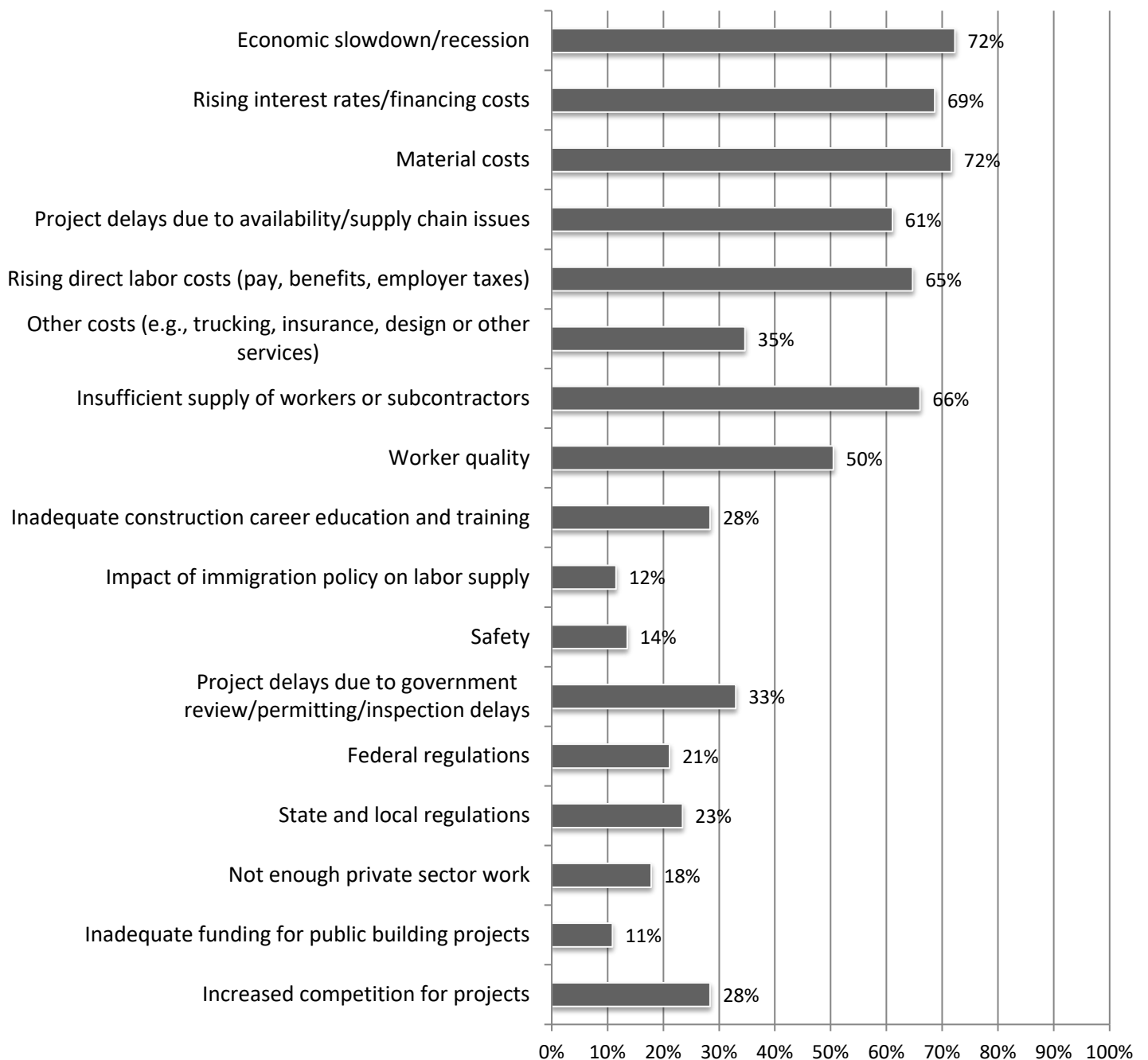
**9. Did an owner postpone or cancel any projects that were scheduled to start in 2022 or 2023? (mark all that apply) Responses: 303**



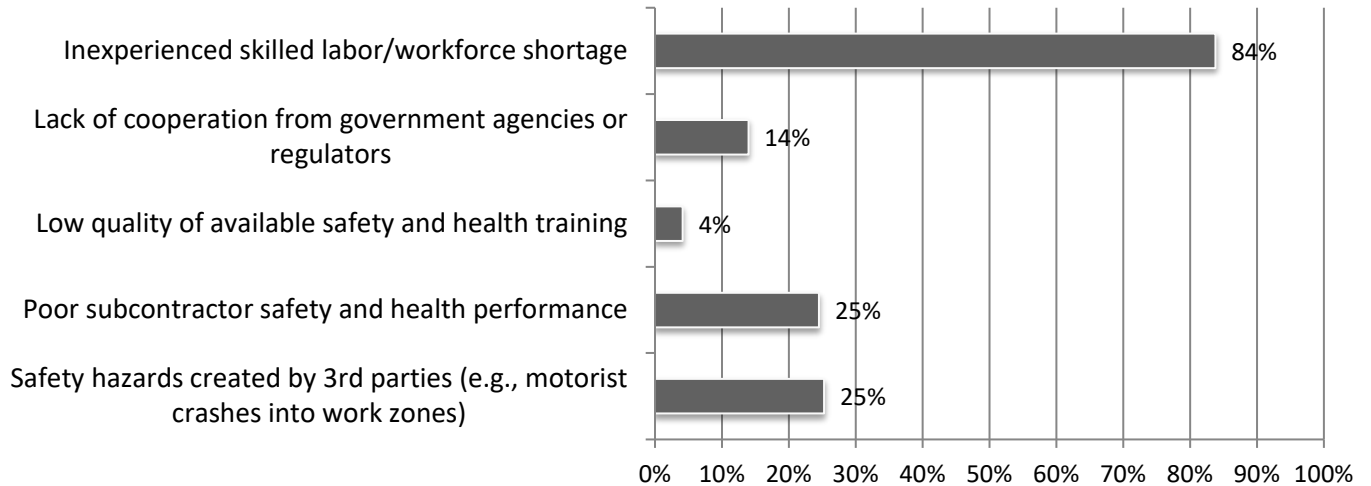
**10. If projects were postponed or canceled, what was the main reason? Responses: 258**



**11. What are your biggest concerns for 2023? (mark all that apply) Responses: 303**



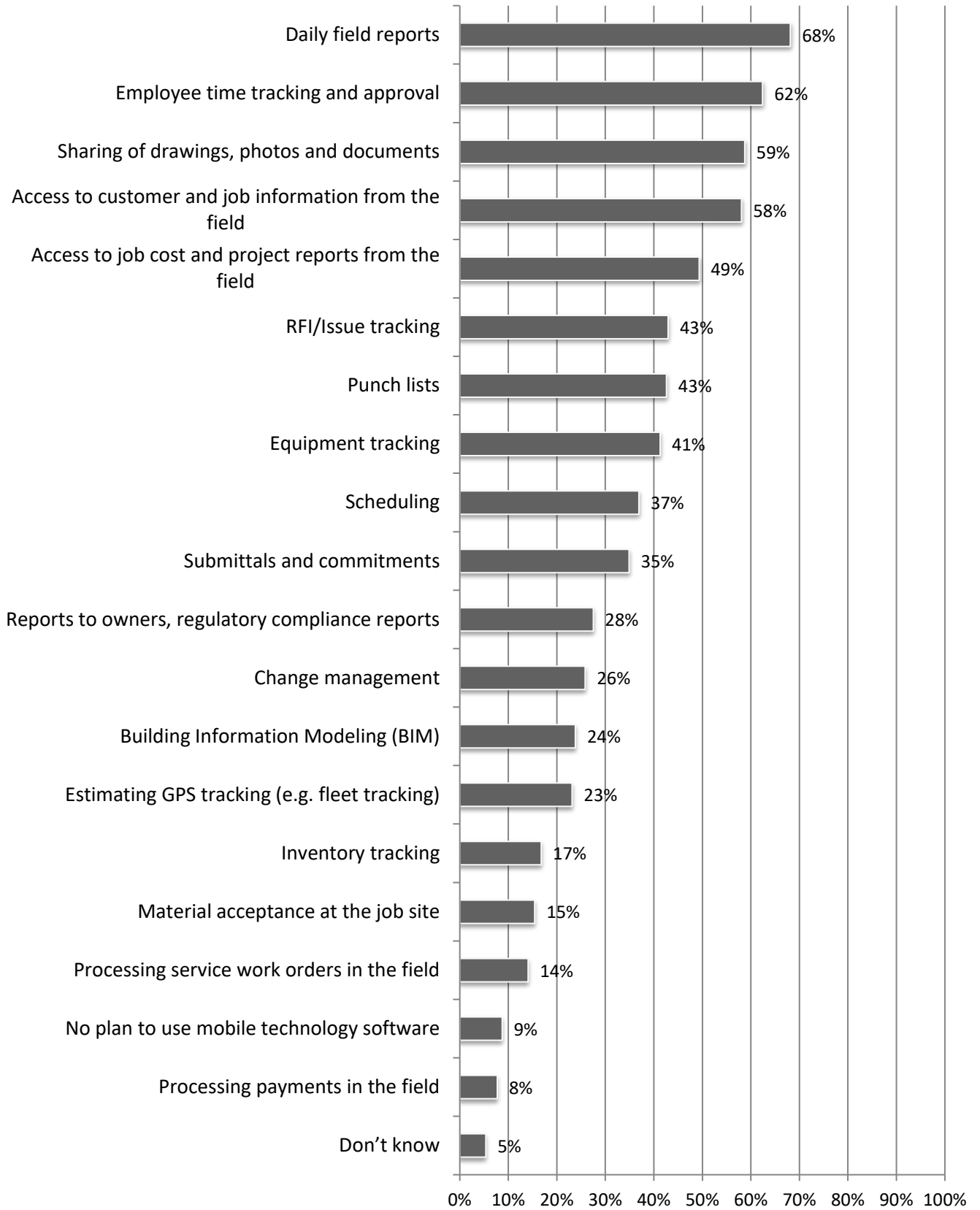
**12. What challenges, if any, do you see regarding the safety and health of your firm's workers? (mark all that apply) Responses: 265**



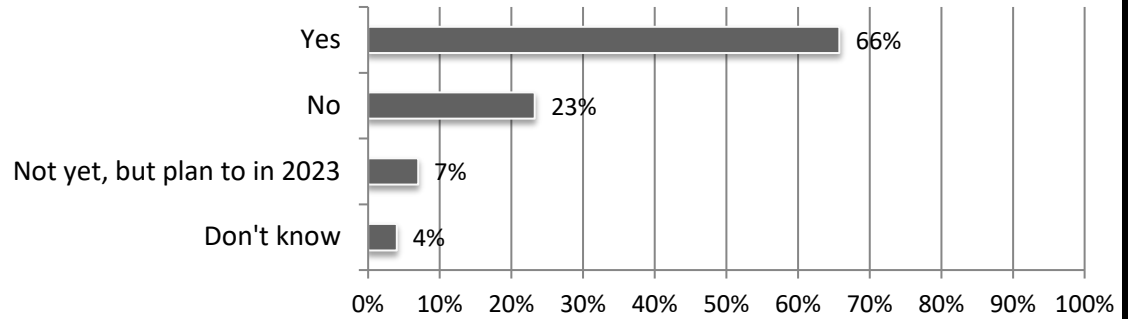
**13. Compared to 2022, will your firm's 2023 investment in the following technologies change? (mark all that apply) Responses: 298**

	Increase	Decrease	No change
Project management software	33%	1%	65%
Document management software	28%	1%	71%
Human resources (HR) software	25%	2%	73%
Estimating software	24%	0%	75%
Tool/asset management/tracking	24%	2%	74%
Accounting software	23%	2%	75%
Fleet tracking/management software	21%	2%	77%
Building Information Modeling (BIM)	20%	1%	79%
Scheduling software	20%	1%	79%
Client relationship management (CRM) software	19%	2%	78%
Project collaboration software	19%	1%	80%
Payroll software	15%	2%	83%
Subcontractor bid management/ITB software	9%	1%	90%
Service management software	7%	1%	92%
Prequalification software	6%	0%	93%

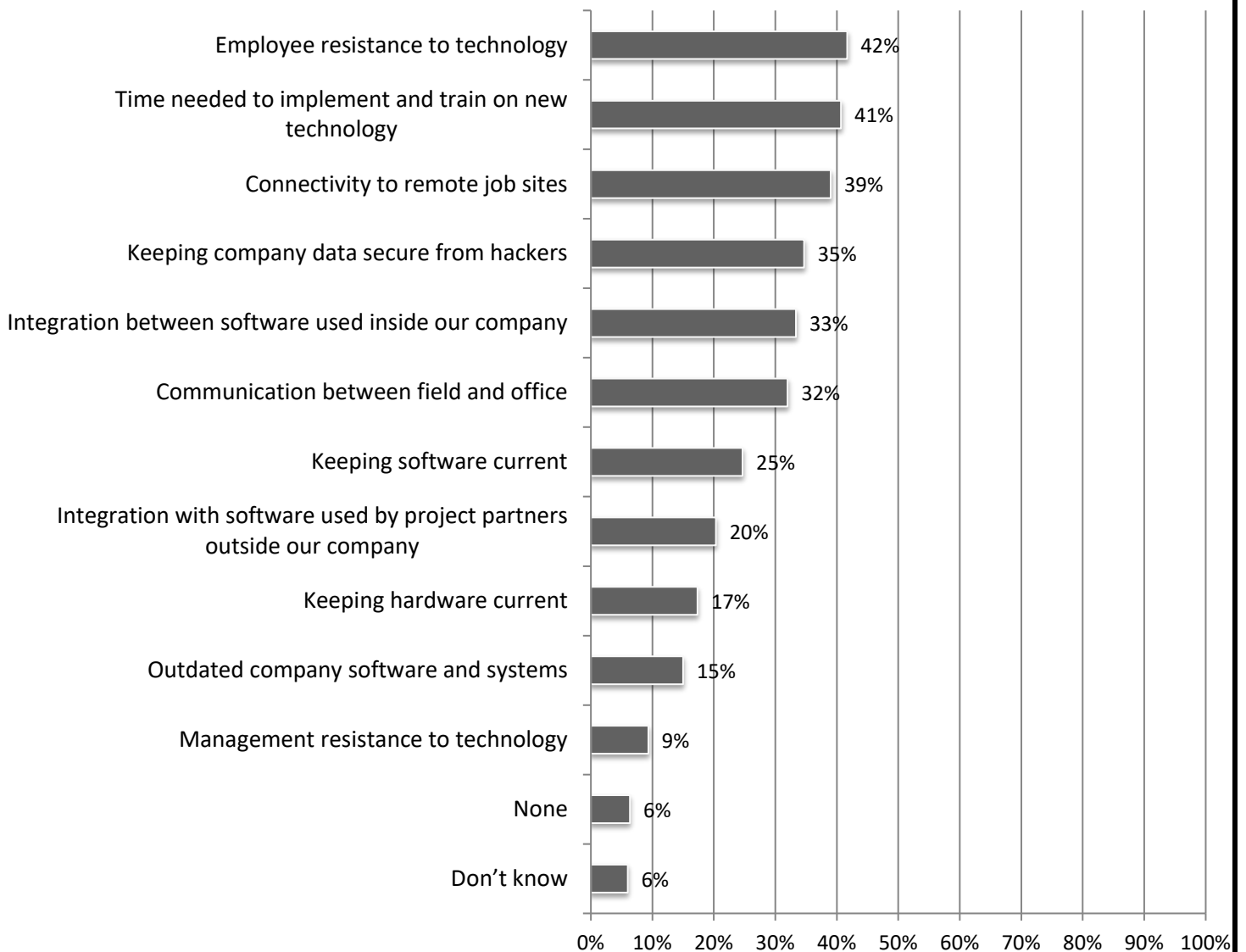
14. How does your company plan to use mobile software technology? (mark all that apply) Responses: 298



**15. Does your firm currently have a formal IT plan to support your business objectives? Responses: 301**



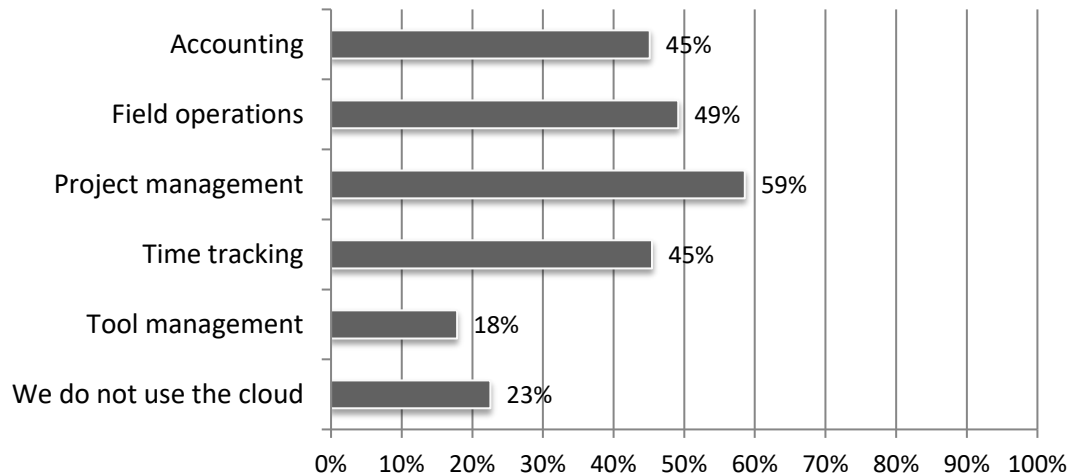
**16. What are your biggest IT challenges (mark all that apply)? Responses: 300**



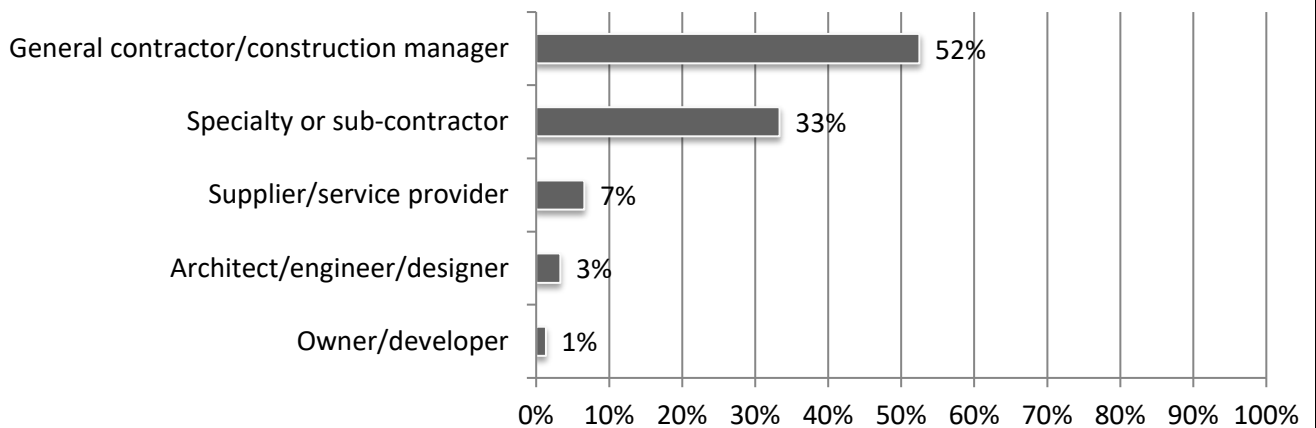


**17. Does your firm use cloud-hosted technology in any of the following ways (mark all that apply)?**

**Responses: 297**

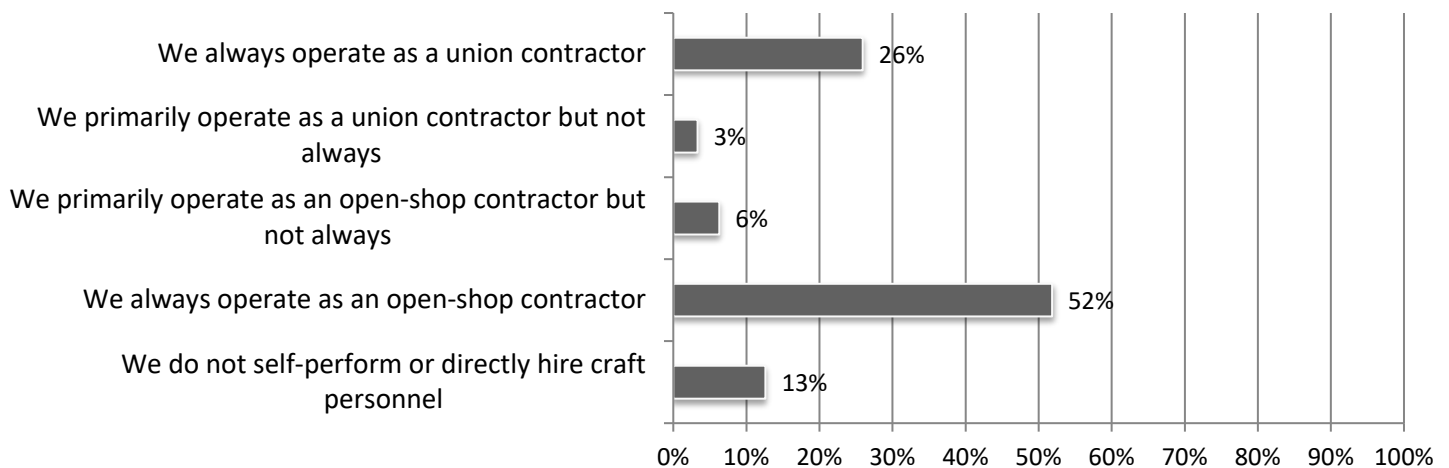


**18. What best describes your firm? Responses: 303**

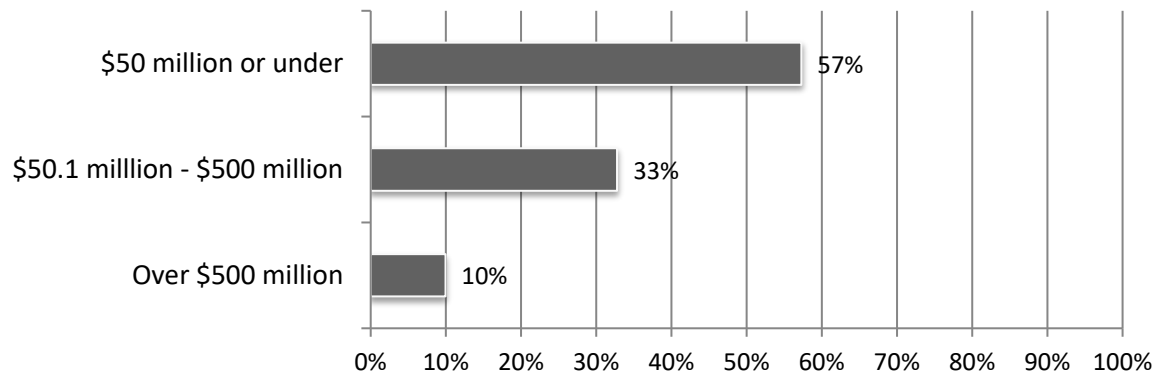


**19. When you self-perform construction work, do you operate as a union contractor or an open-shop contractor?**

**Responses: 301**



**20. Estimate the total dollar amount of work your firm performed in 2022. Responses: 302**



**21. How many total employees does your firm employ at all of its locations? Responses: 301**

