



AGC
THE CONSTRUCTION
ASSOCIATION

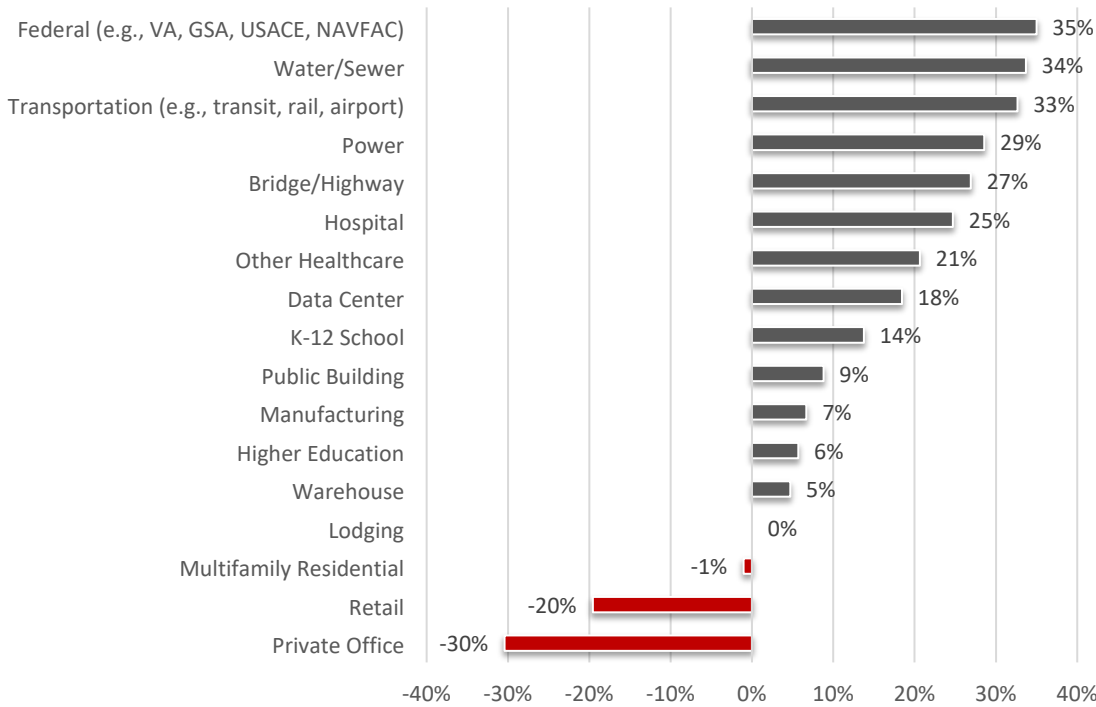
Sage

2024 Construction Outlook West Survey Results

Total Responses: 304. 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 2023, do you expect the available dollar value of projects you compete for in 2024 to be higher/lower/about the same (answer for all market areas in which your business operates)
Responses: 302

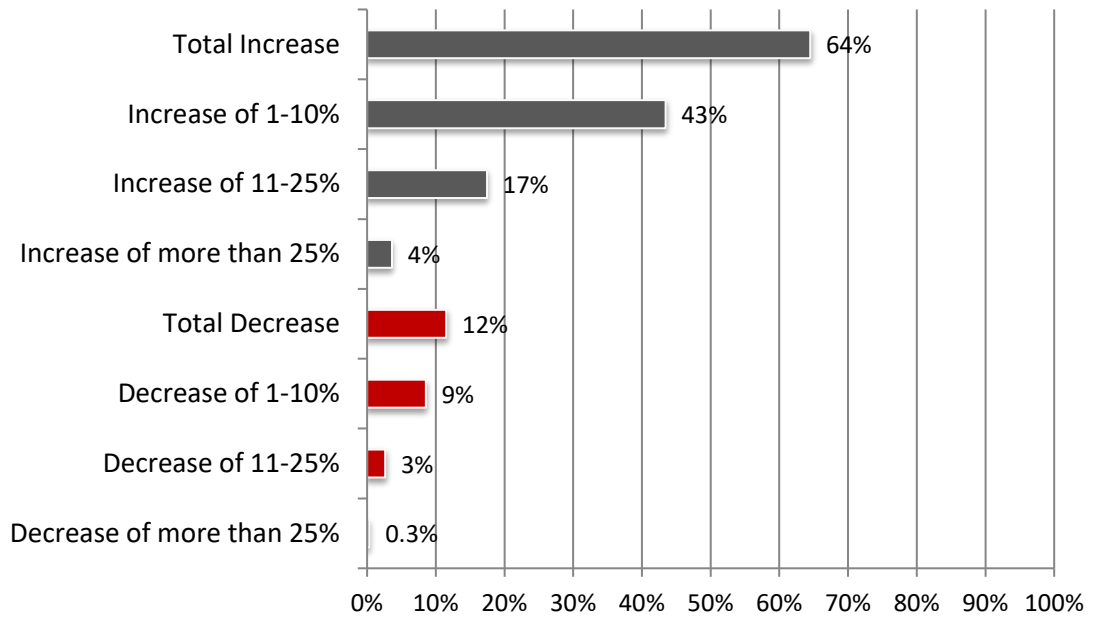
Net % expecting 2024 value of projects to be Higher or Lower than 2023



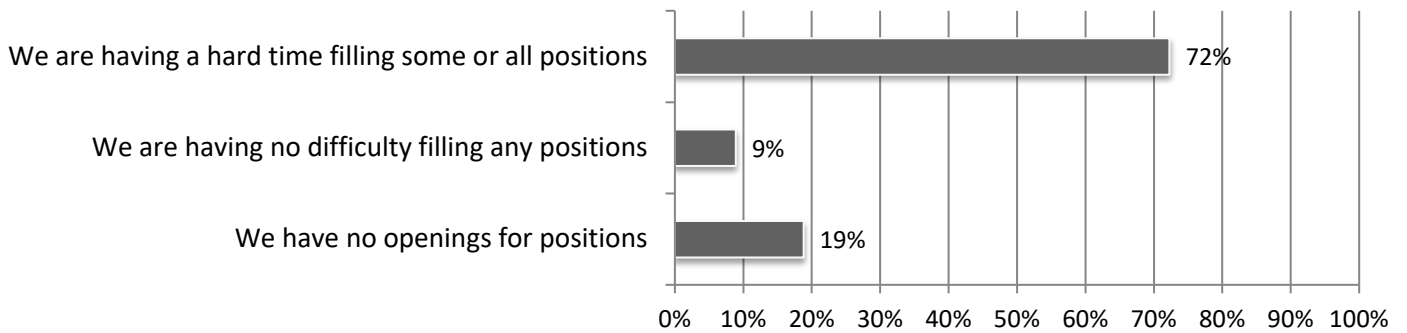
Higher	Lower	Same
46%	11%	42%
45%	11%	44%
49%	16%	35%
40%	12%	48%
44%	17%	39%
38%	14%	48%
36%	15%	49%
35%	17%	48%
30%	16%	54%
31%	22%	48%
31%	25%	44%
27%	21%	52%
32%	28%	40%
26%	26%	48%
31%	32%	36%
22%	41%	37%
16%	47%	37%

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

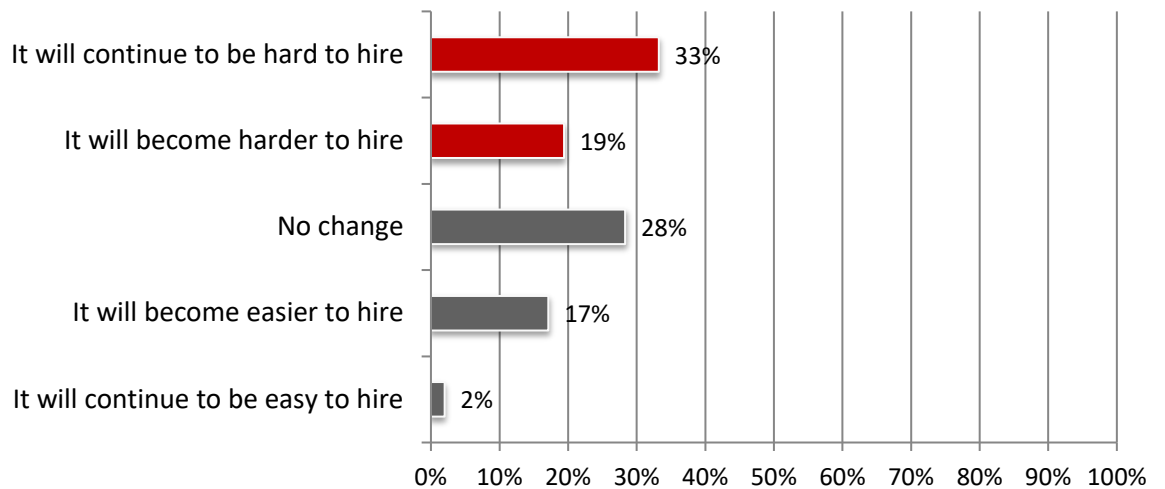
2. What percentage change do you expect in your headcount in 2024? Responses: 304



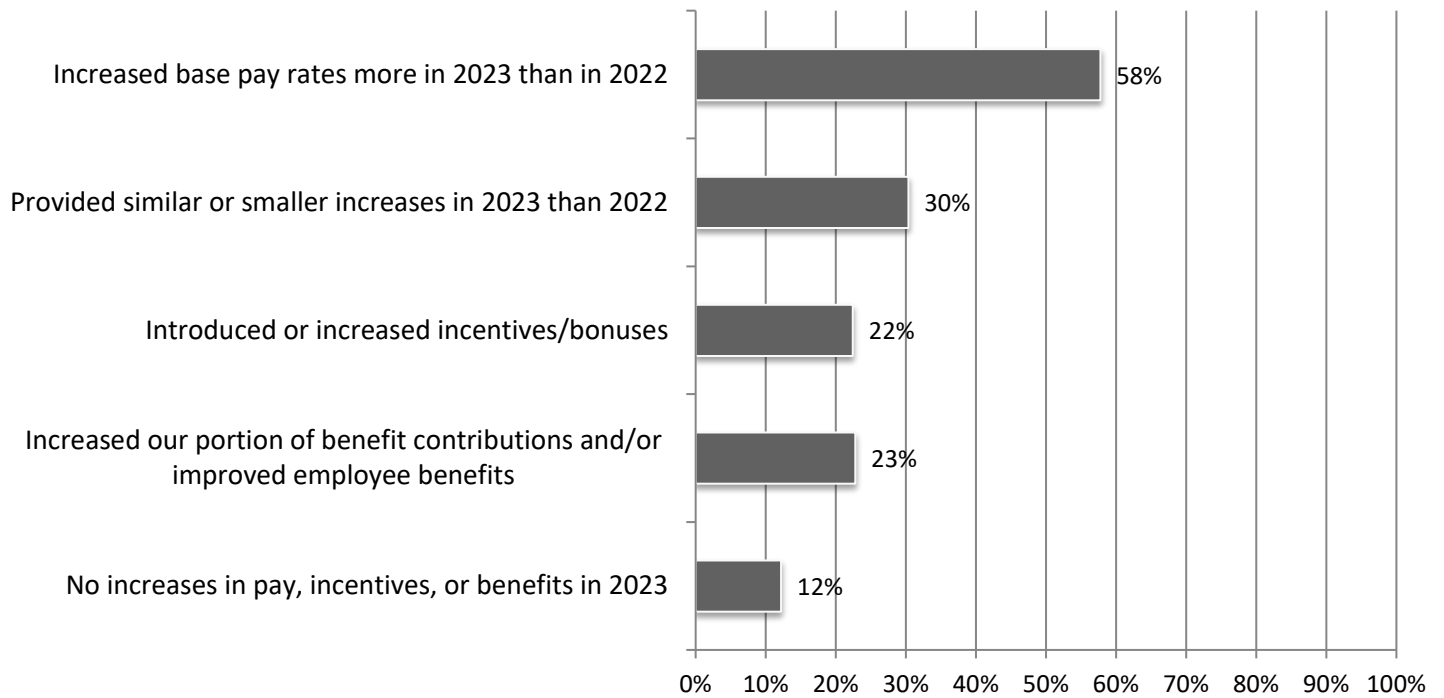
3. How would you describe your current situation in filling salaried and hourly craft positions? Responses: 303



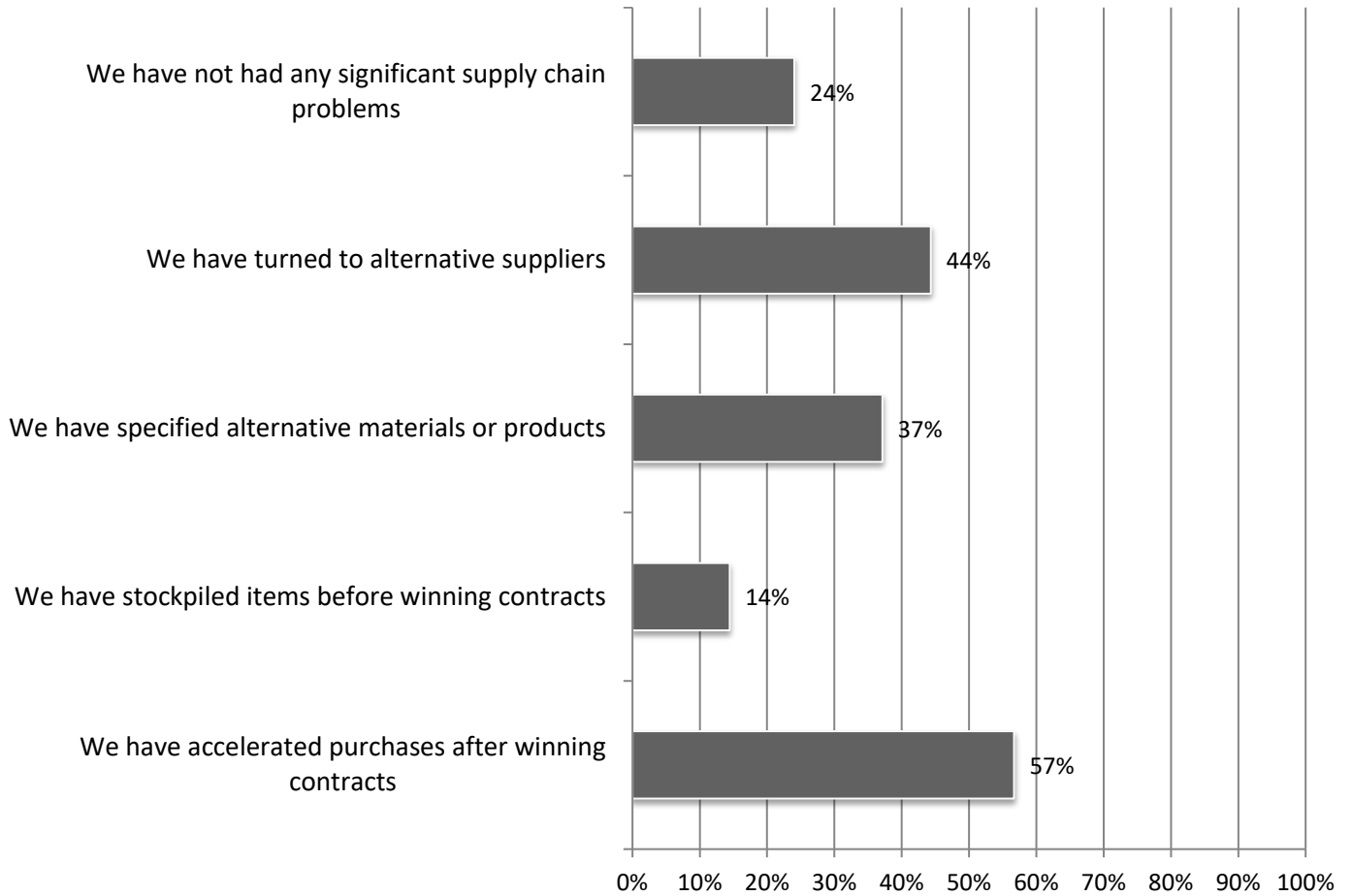
4. Do you expect any changes in the availability of hourly craft or salaried personnel over the coming 12 months? Responses: 304



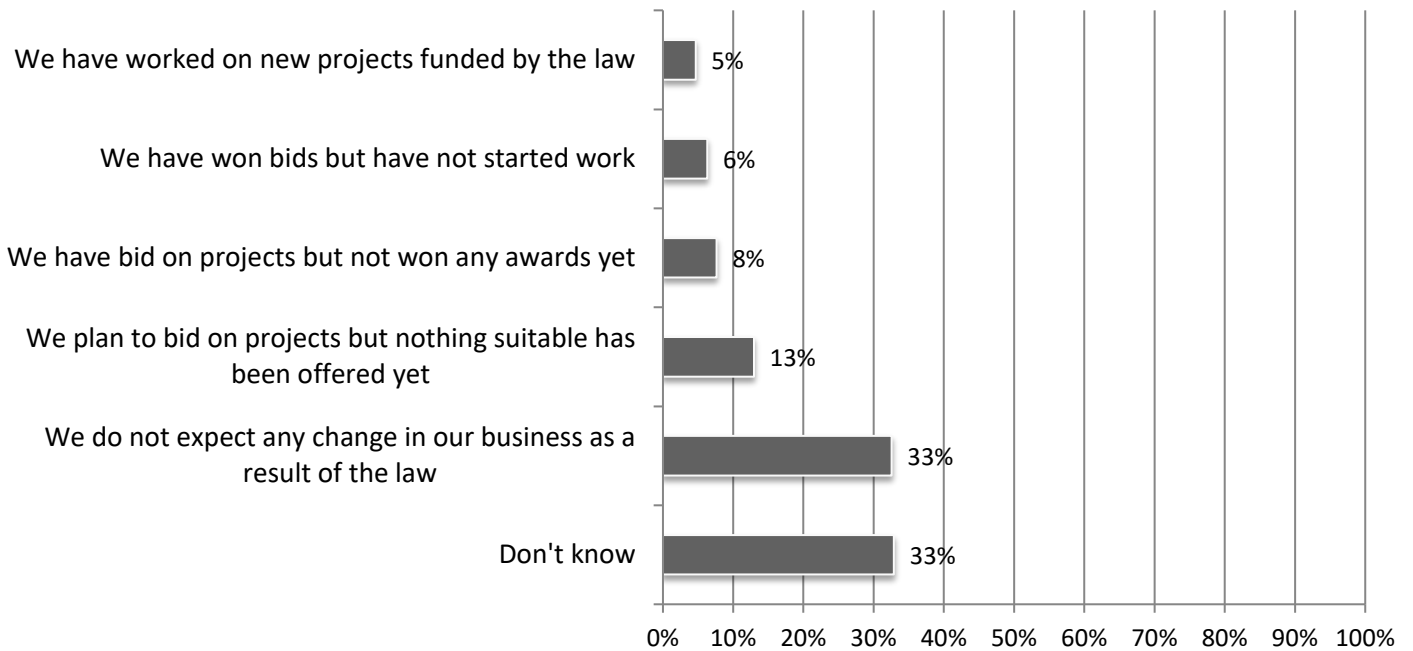
5. What changes did your firm make in pay or benefits in 2023? (mark all that apply) Responses: 303



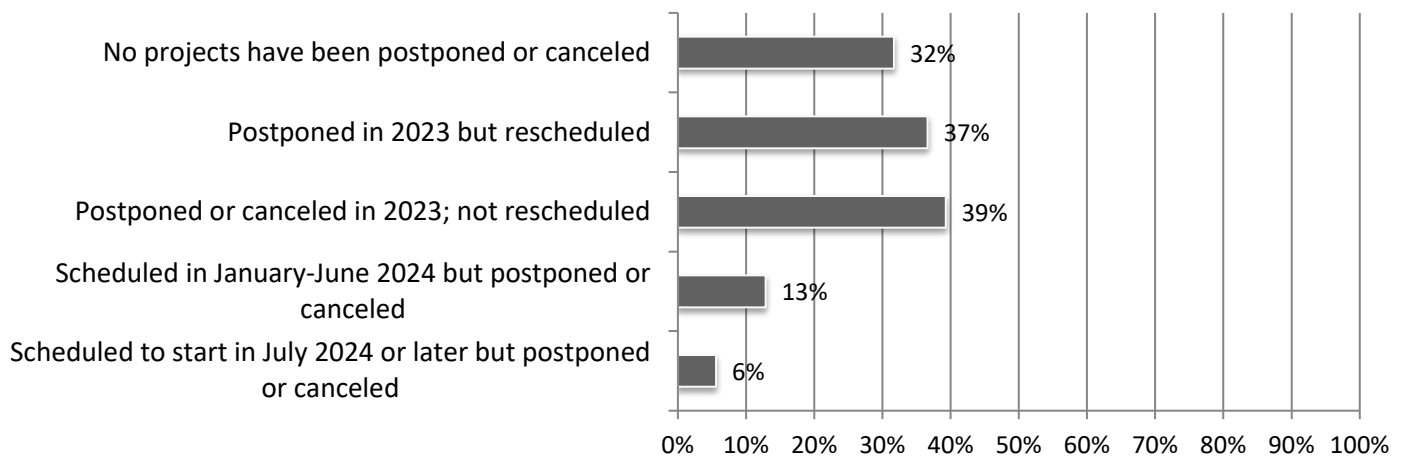
6. How has your firm responded to supply-chain issues, if any? (mark all that apply) Responses: 291



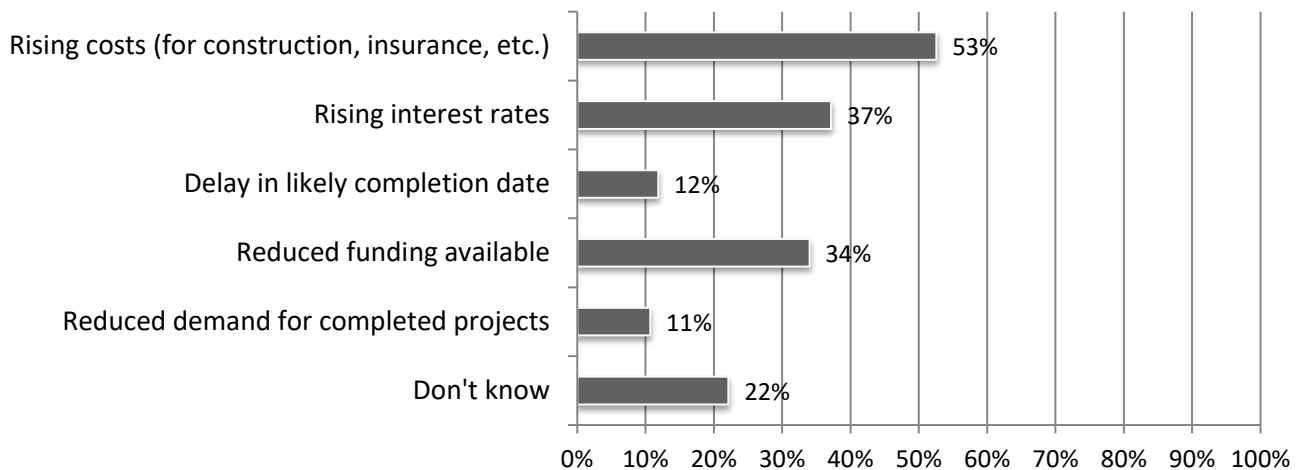
7. What difference, if any, has the Infrastructure Investment and Jobs Act (also known as the Bipartisan Infrastructure Law), made to your business? Responses: 301



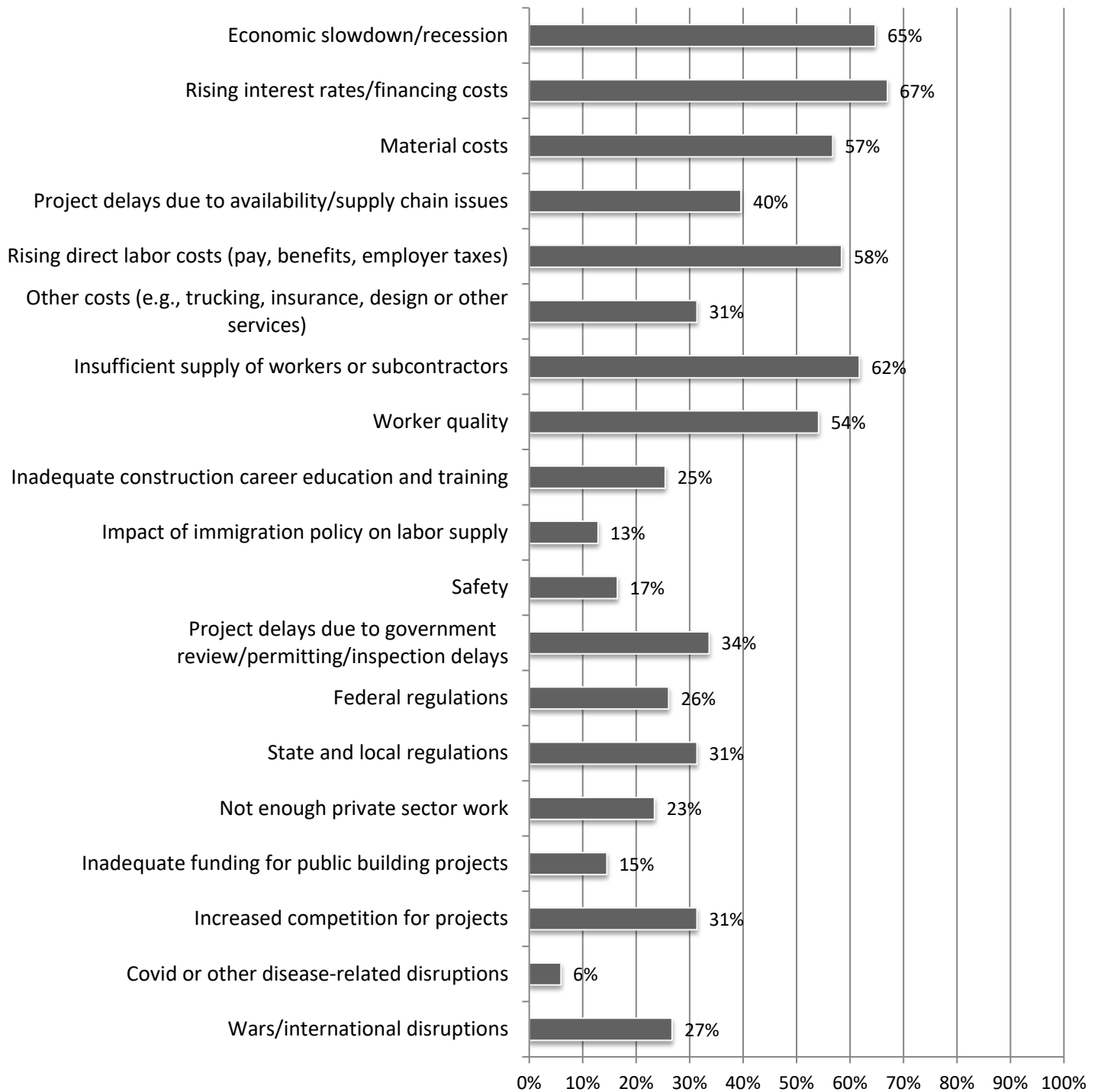
8. Did an owner postpone or cancel any projects that were scheduled to start in 2023 or 2024? (mark all that apply) Responses: 303



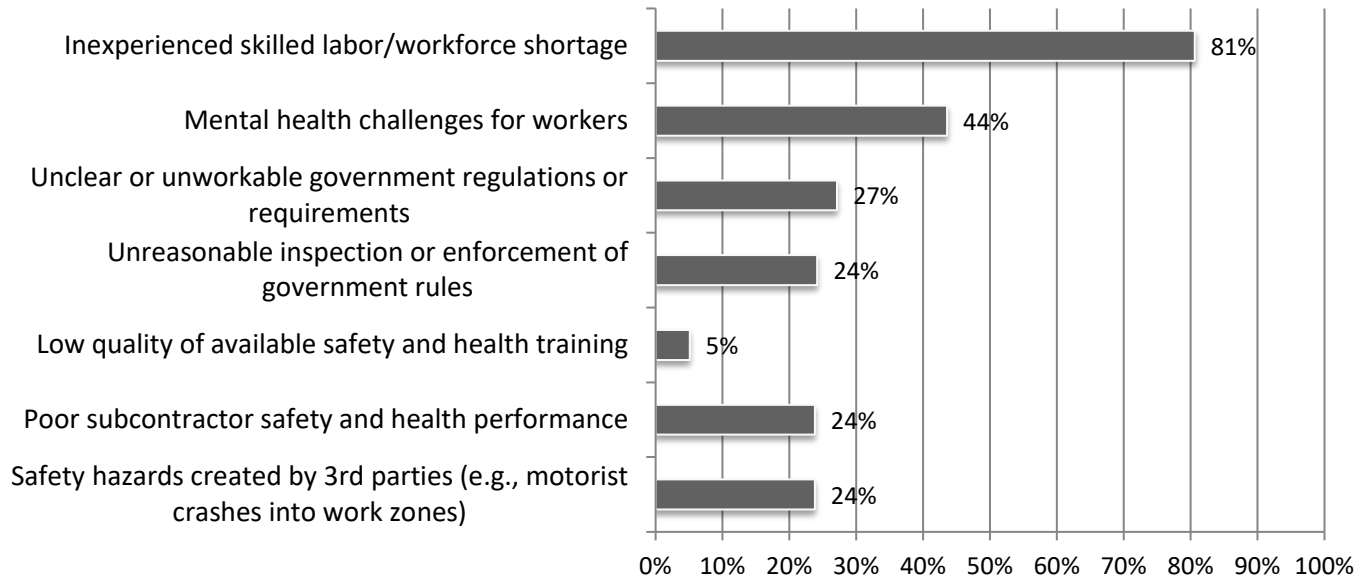
9. If projects were postponed or canceled, what was the main reason? Responses: 253



10. What are your biggest concerns for 2024? (mark all that apply) Responses: 303



11. What challenges, if any, do you see regarding the safety and health of your firm's workers? (mark all that apply) Responses: 273



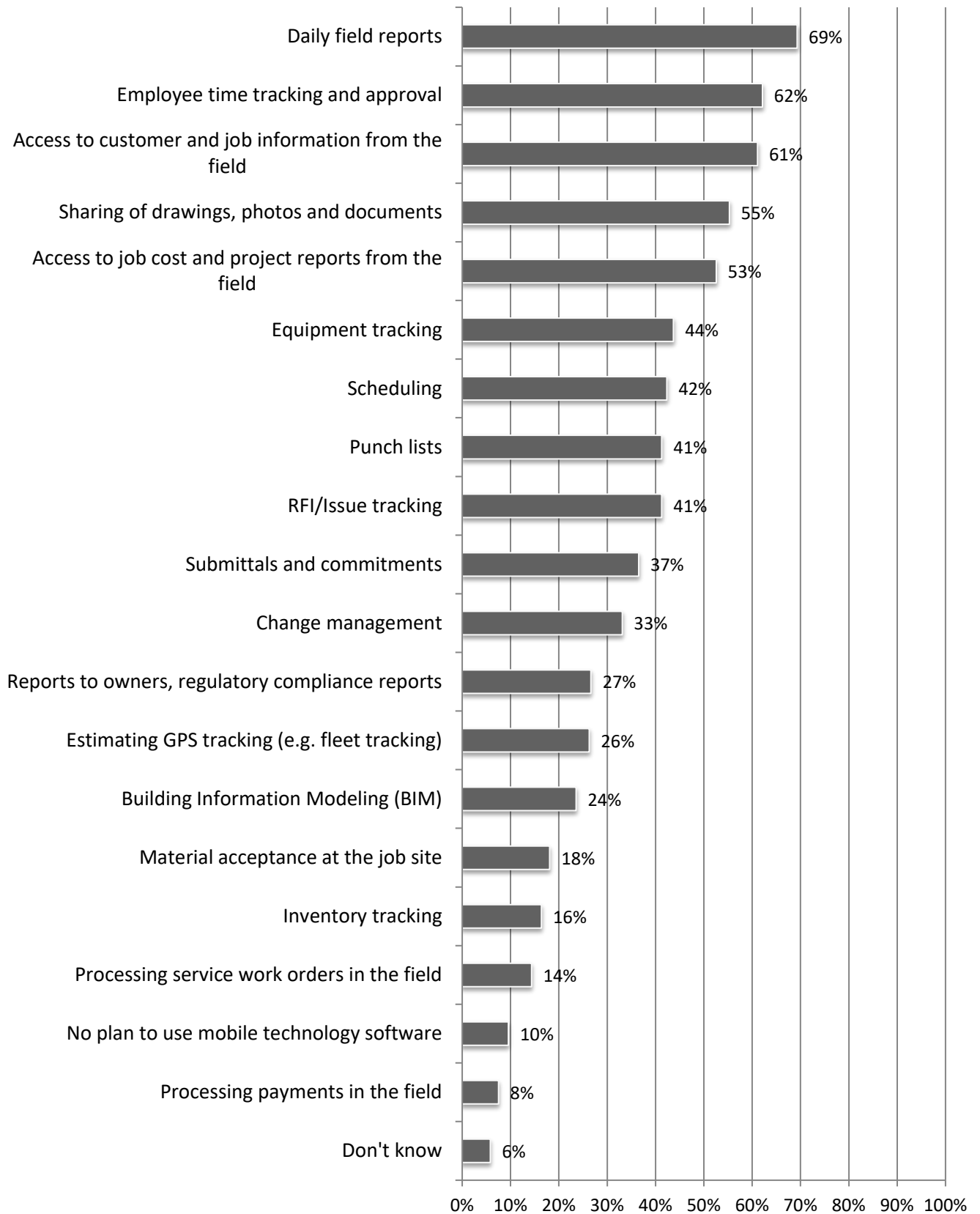
12. Does your company invest in: Responses: 296

	Initial Investment	Increased Investment	Decreased Investment	No Investment
Artificial intelligence	21%	12%	0.4%	67%
Robotics	6%	10%	0%	84%
Drones	15%	24%	2%	58%
Autonomous equipment or vehicles	9%	7%	0%	84%
3-D printing	8%	4%	0.8%	88%
Offsite production	10%	19%	0.4%	71%

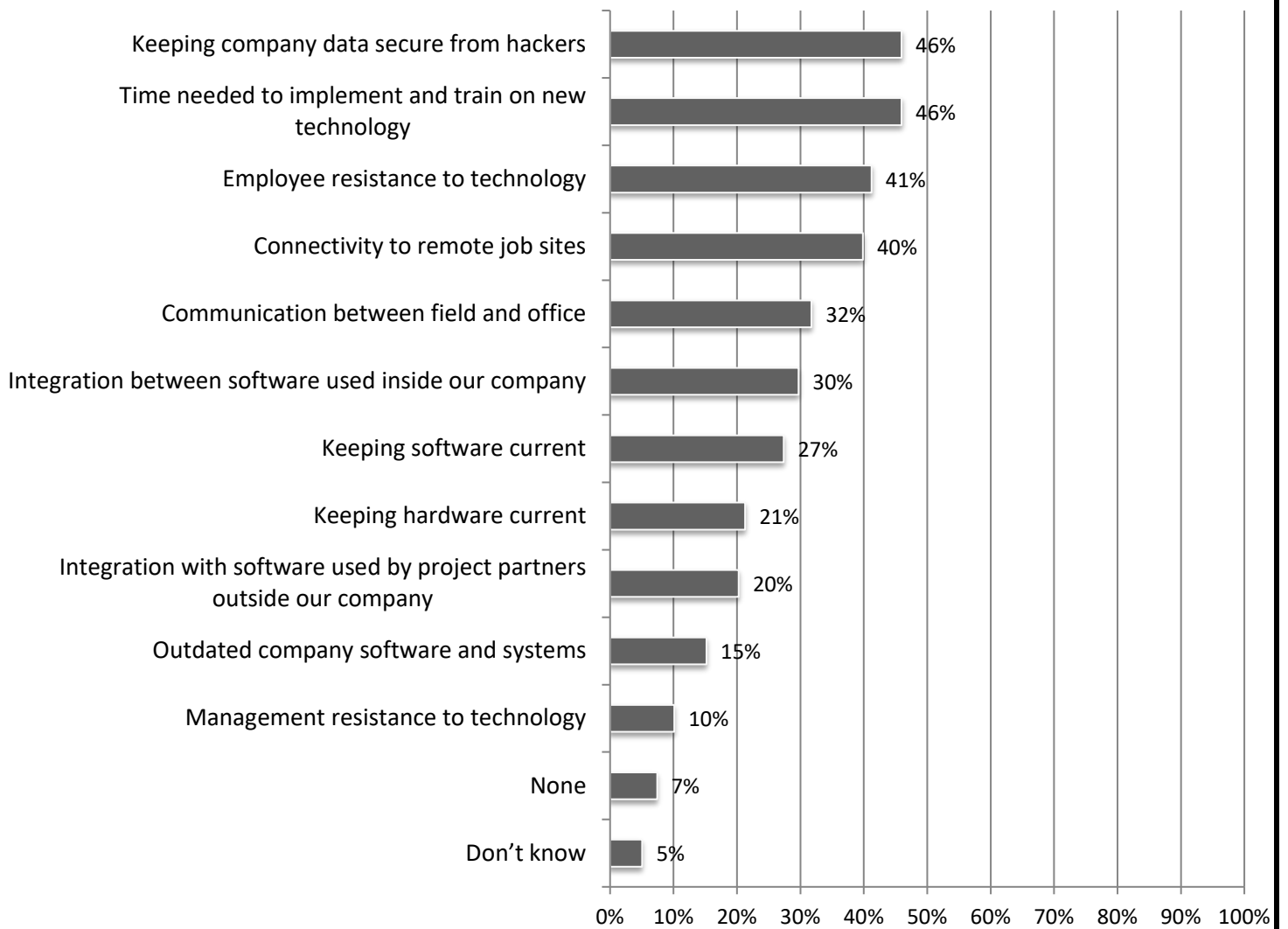
13. Compared to 2024, will your firm's 2023 investment in the following technologies change? (mark all that apply) Responses: 296

	Increase	Decrease	No change
Document management software	37%	1%	62%
Project management software	36%	0.4%	63%
Accounting software	34%	0.3%	65%
Fleet tracking/management software	29%	1%	70%
Tool/asset management/tracking	26%	1%	73%
Estimating software	25%	0.4%	75%
Scheduling software	25%	0.4%	75%
Project collaboration software	24%	1%	75%
Building Information Modeling (BIM)	23%	1%	76%
Human resources (HR) software	22%	2%	76%
Client relationship management (CRM) software	21%	2%	78%
Payroll software	20%	1%	78%
Service management software	11%	1%	89%
Subcontractor bid management/ITB software	11%	1%	89%
Prequalification software	8%	0.4%	92%

14. How does your company plan to use mobile software technology? (mark all that apply) Responses: 293

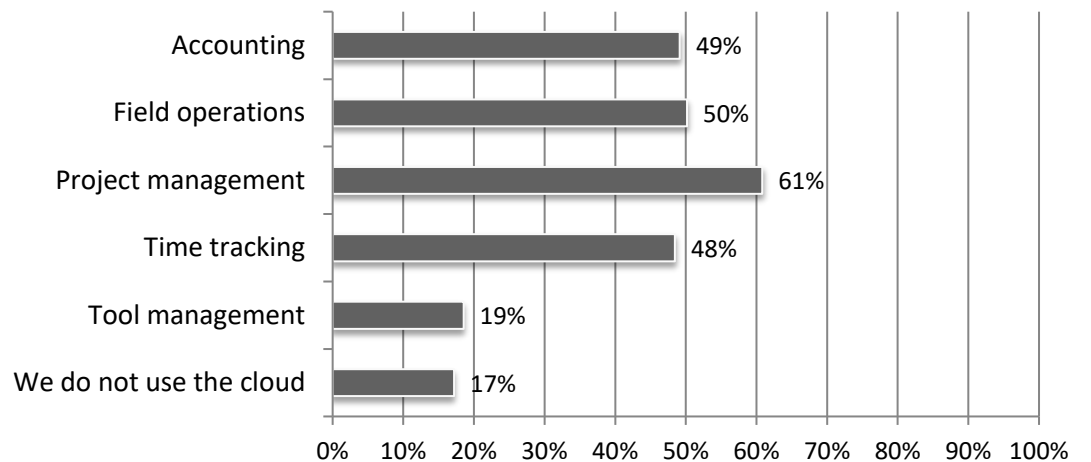


15. What are your biggest IT challenges (mark all that apply)? Responses: 296

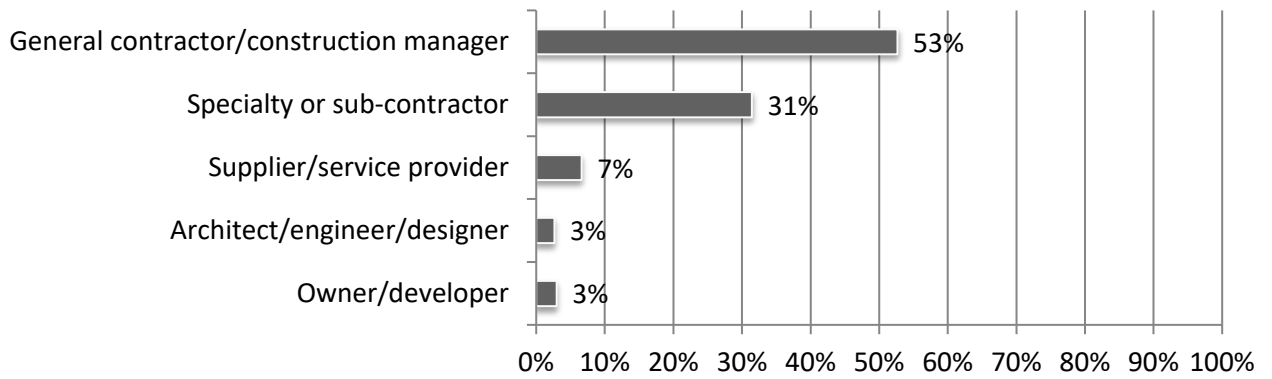


16. Does your firm use cloud-hosted technology in any of the following ways (mark all that apply)?

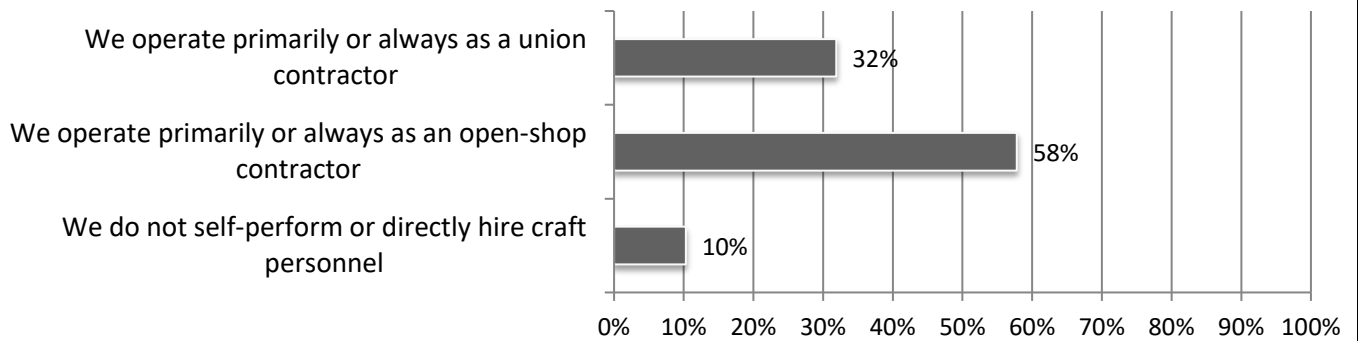
Responses: 291



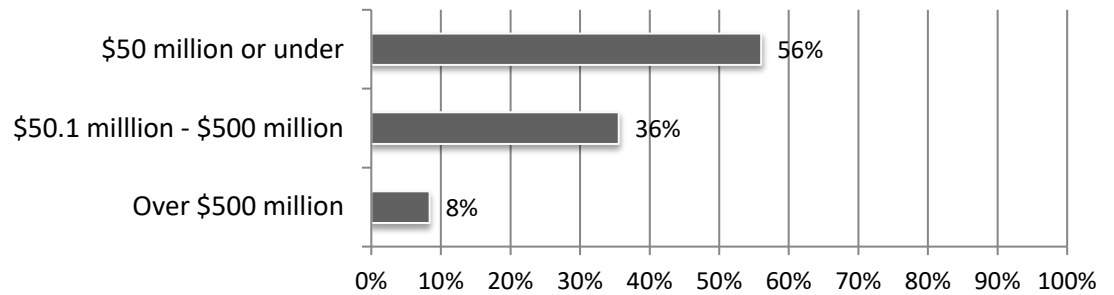
17. What best describes your firm? Responses: 302



18. When you self-perform construction work, do you operate as a union contractor or an open-shop contractor? Responses: 301



19. Estimate the total dollar amount of work your firm performed in 2023. Responses: 298



20. How many total employees does your firm employ at all of its locations? Responses: 299

