



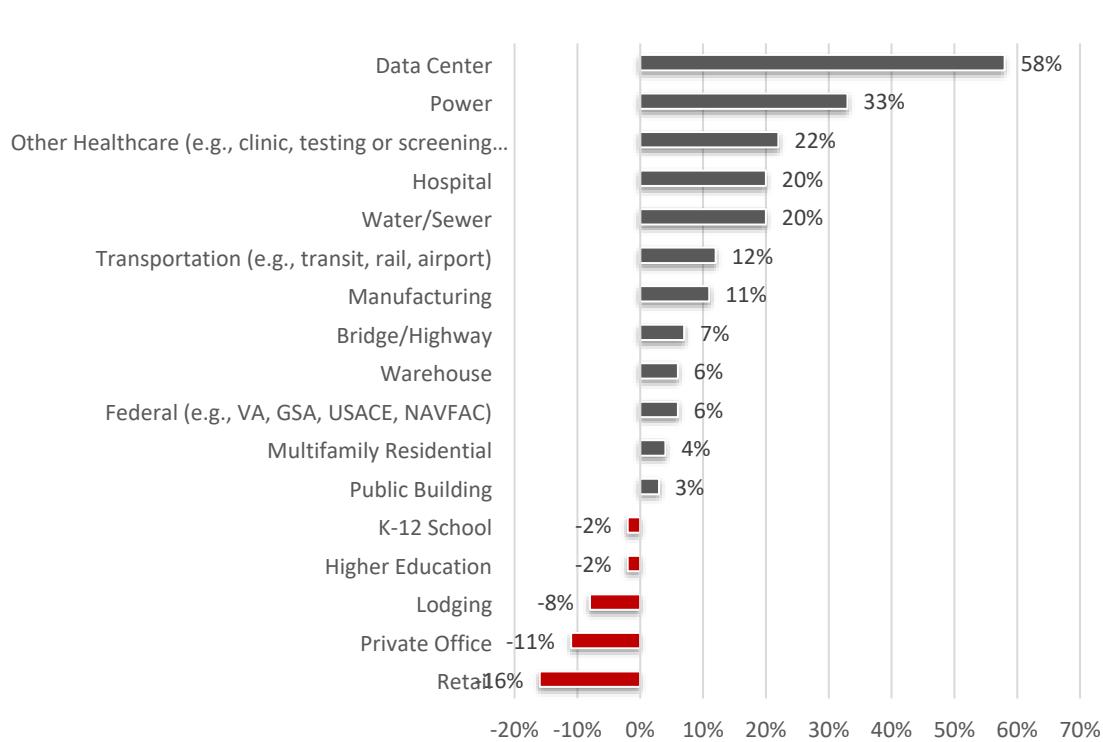
## 2026 Construction Outlook Open-shop Survey Results

*Total Responses: 505. 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 2025, do you expect the available dollar value of projects you compete for in 2026 to be higher/lower/about the same (answer for all market areas in which your business operates)

**Responses: 503**

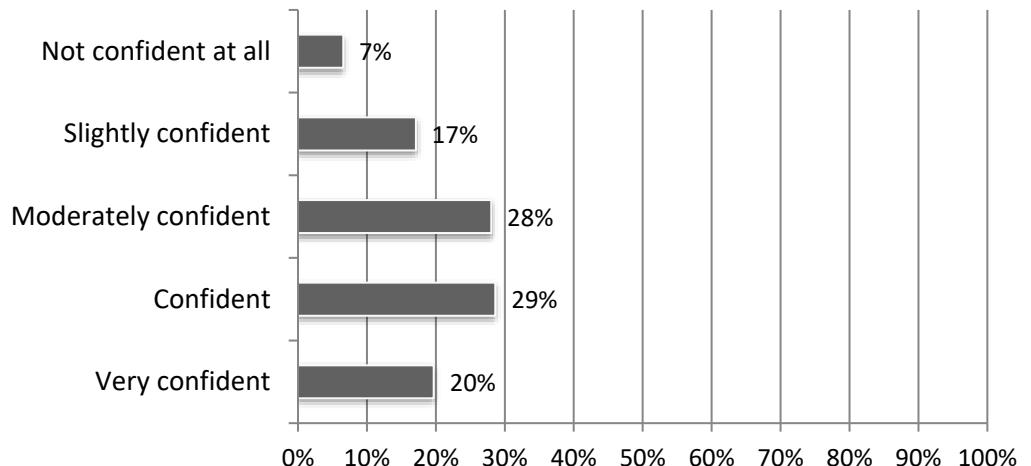
Net % expecting 2026 value of projects to be Higher or Lower than 2025



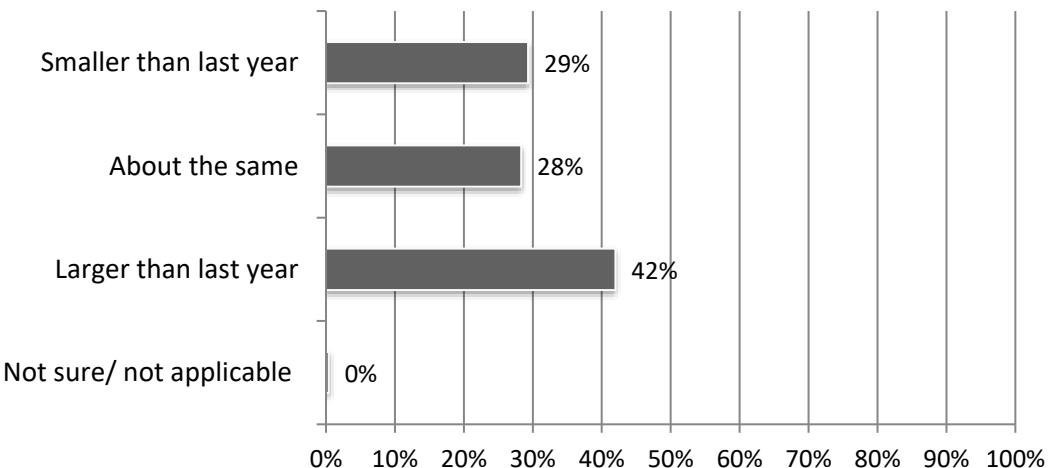
Higher	Lower	Same
65%	7%	29%
44%	11%	45%
38%	16%	46%
37%	18%	45%
38%	18%	43%
33%	21%	46%
35%	23%	42%
29%	22%	49%
29%	24%	47%
29%	23%	48%
33%	29%	37%
27%	24%	49%
26%	28%	46%
27%	30%	43%
23%	31%	46%
22%	34%	44%
19%	35%	46%

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

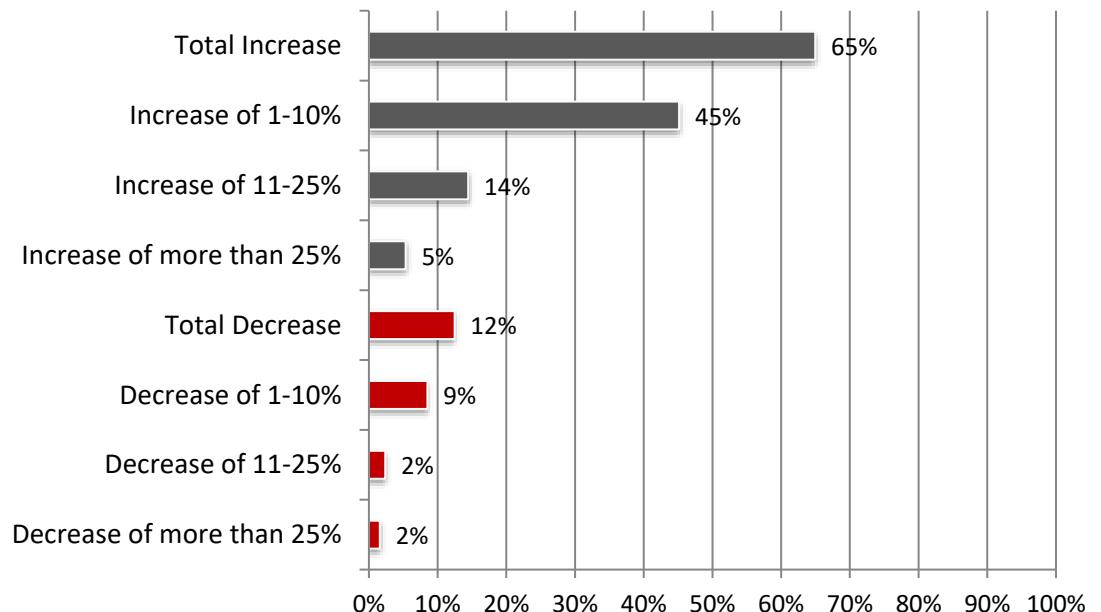
2. How confident are you in your firm's backlog and bidding pipeline going into 2026? Responses: 503



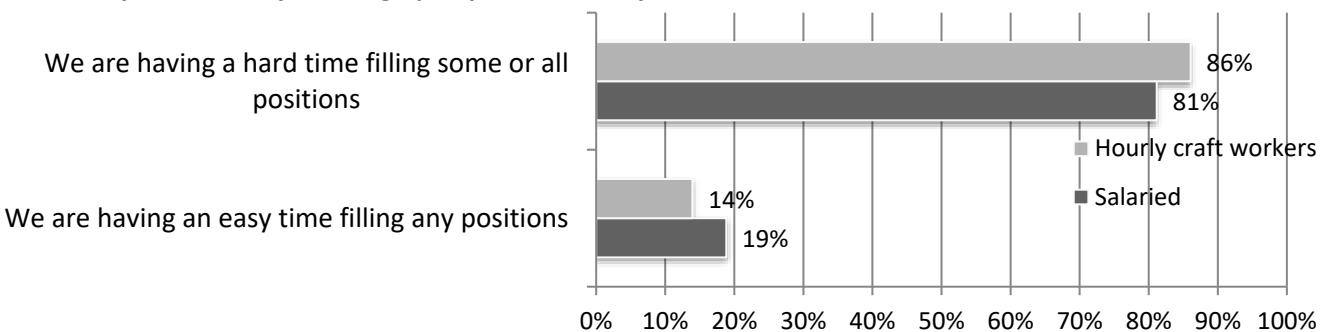
3. How does your firm's backlog compare to this time last year? Responses: 505



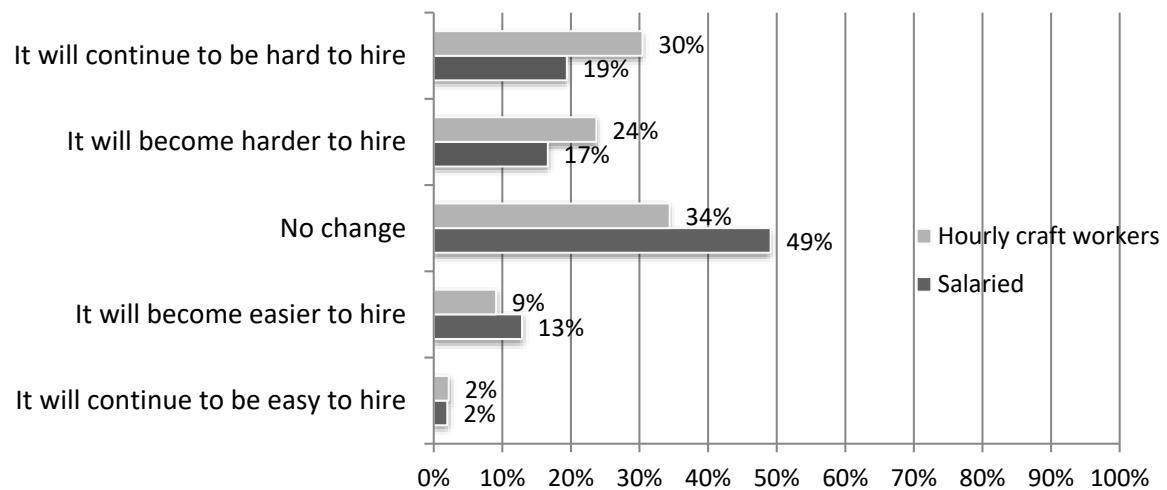
4. What percentage change do you expect in your headcount in 2026? Responses: 505



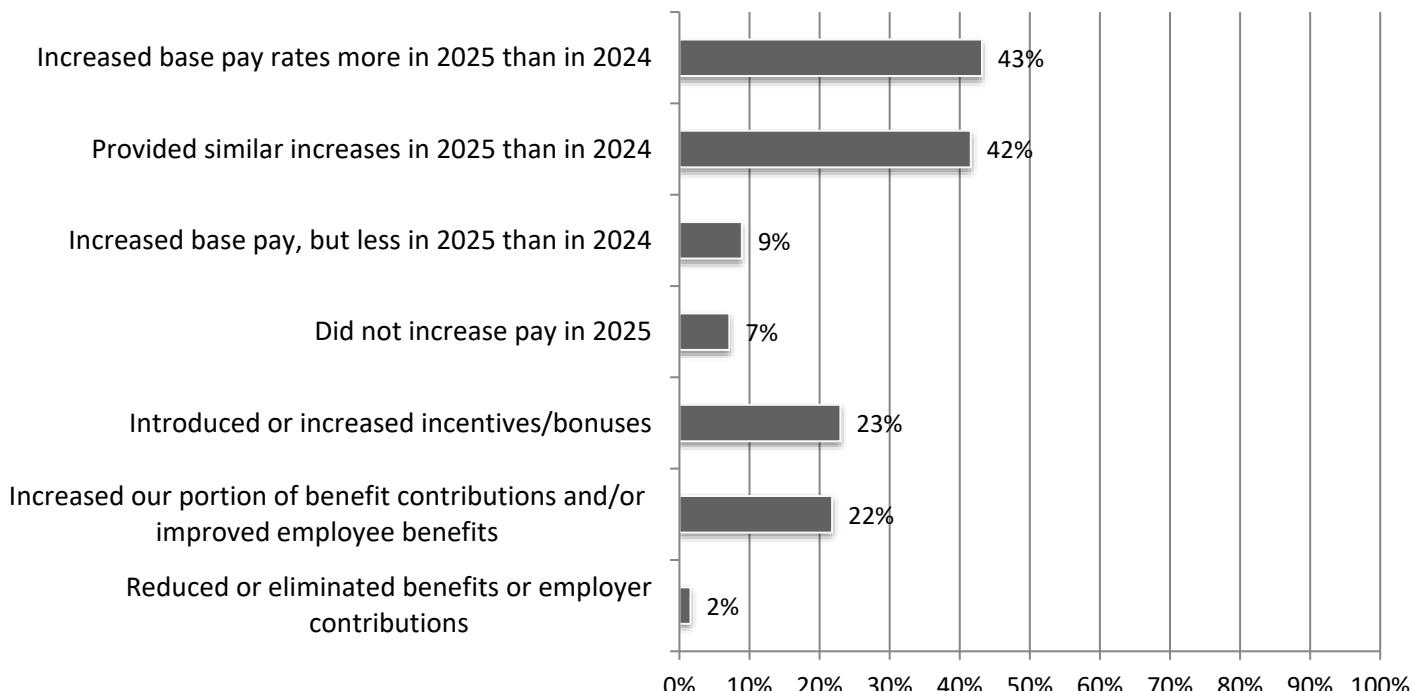
5. Describe your difficulty in filling open positions: Responses: Craft 504; Salaried 505



6. Do you expect any changes in the availability of hourly craft or salaried personnel over the coming 12 months? Responses: Craft 506; Salaried 505

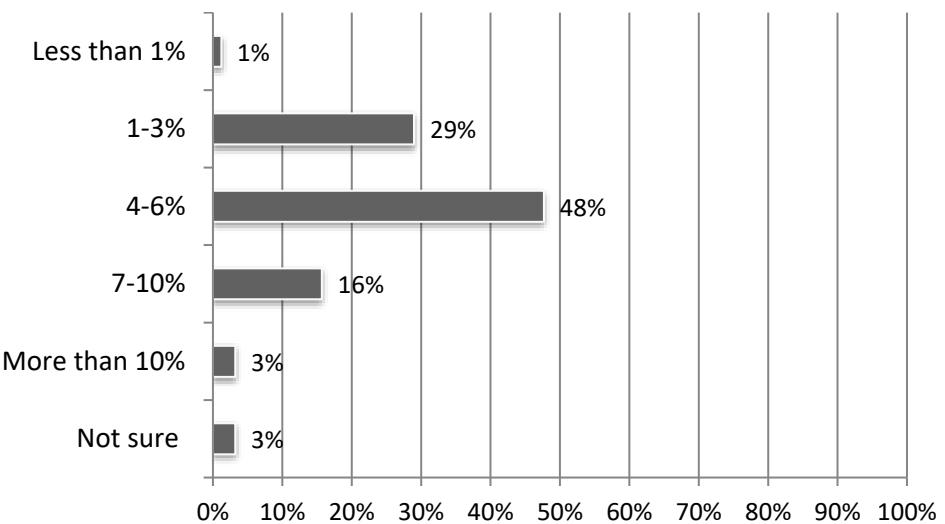


7. What changes did your firm make in pay or benefits in 2025? (mark all that apply) Responses: 505

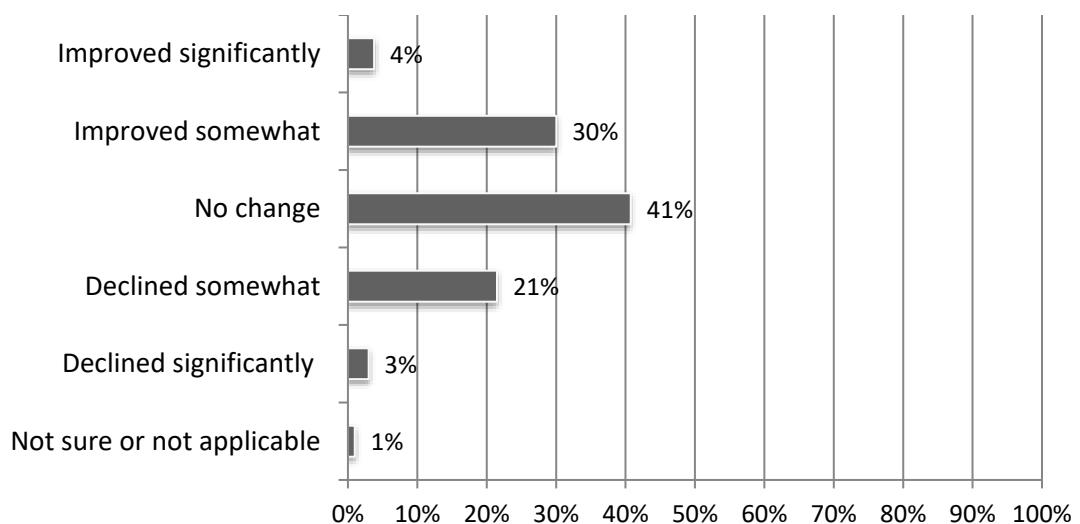


8. For employees whose pay increased in 2025, approximately what was the average percentage increase?

Responses: 497



9. How has overall productivity on your projects changed over the past 12 months? "Productivity" refers to output completed per worker hour or per crew hour. Responses: 503



**10. How has your firm responded to supply-chain issues in 2025, if any? (mark all that apply) Responses: 503**

We have not had any significant supply chain problems

45%

We have turned to alternative suppliers

30%

We have specified alternative materials or products

24%

We have stockpiled items before winning contracts

9%

We have accelerated purchases after winning contracts

41%

We have shifted sourcing or procurement to comply with Buy America/domestic content requirements

11%

We have adjusted project schedules or scopes due to labor or material shortages linked to immigration enforcement or policy change

16%

0% 10% 20% 30% 40% 50% 60% 70% 80% 90% 100%

**11. In the past six months, did you have projects canceled, postponed, or scaled back for any of the reasons below? (mark all that apply) Responses: 504**

No

40%

Financing unavailable or too expensive

33%

Increasing materials or labor costs

23%

Lengthening or uncertain completion times

13%

Changes in demand/need due to tariffs

12%

Changes in demand/need due to other policy changes (federal funding, taxes, regulation etc)

18%

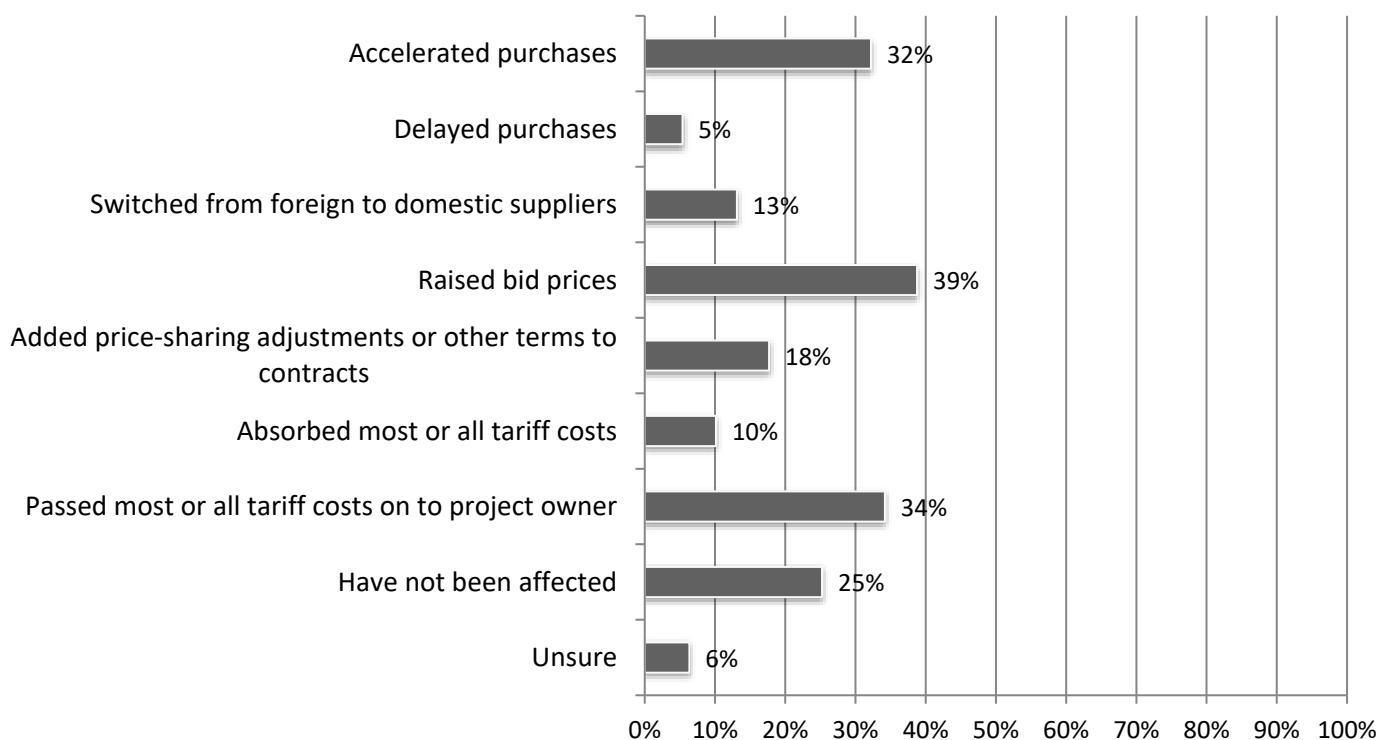
Lack of funding or funding uncertainty (federal, state, or private)

34%

0% 10% 20% 30% 40% 50% 60% 70% 80% 90% 100%

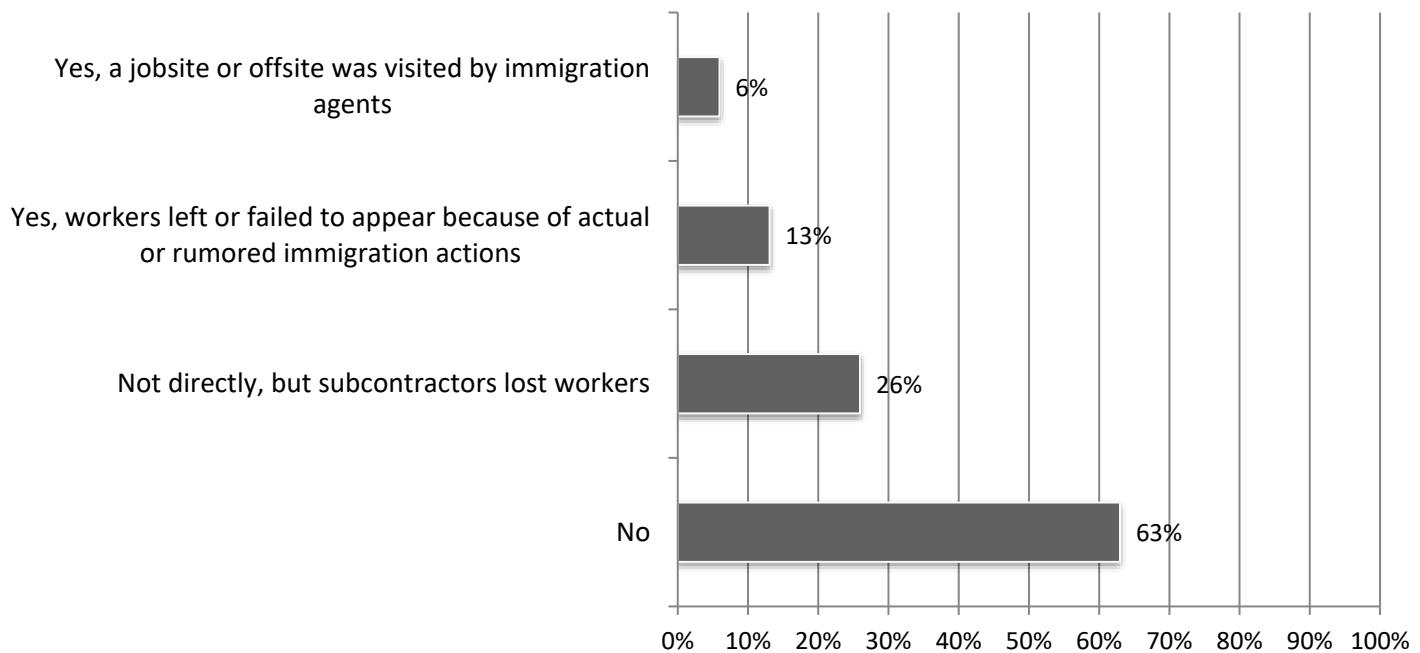
**12. What actions, if any, has your firm taken in response to actual or proposed tariffs? (mark all that apply)**

Responses: 503

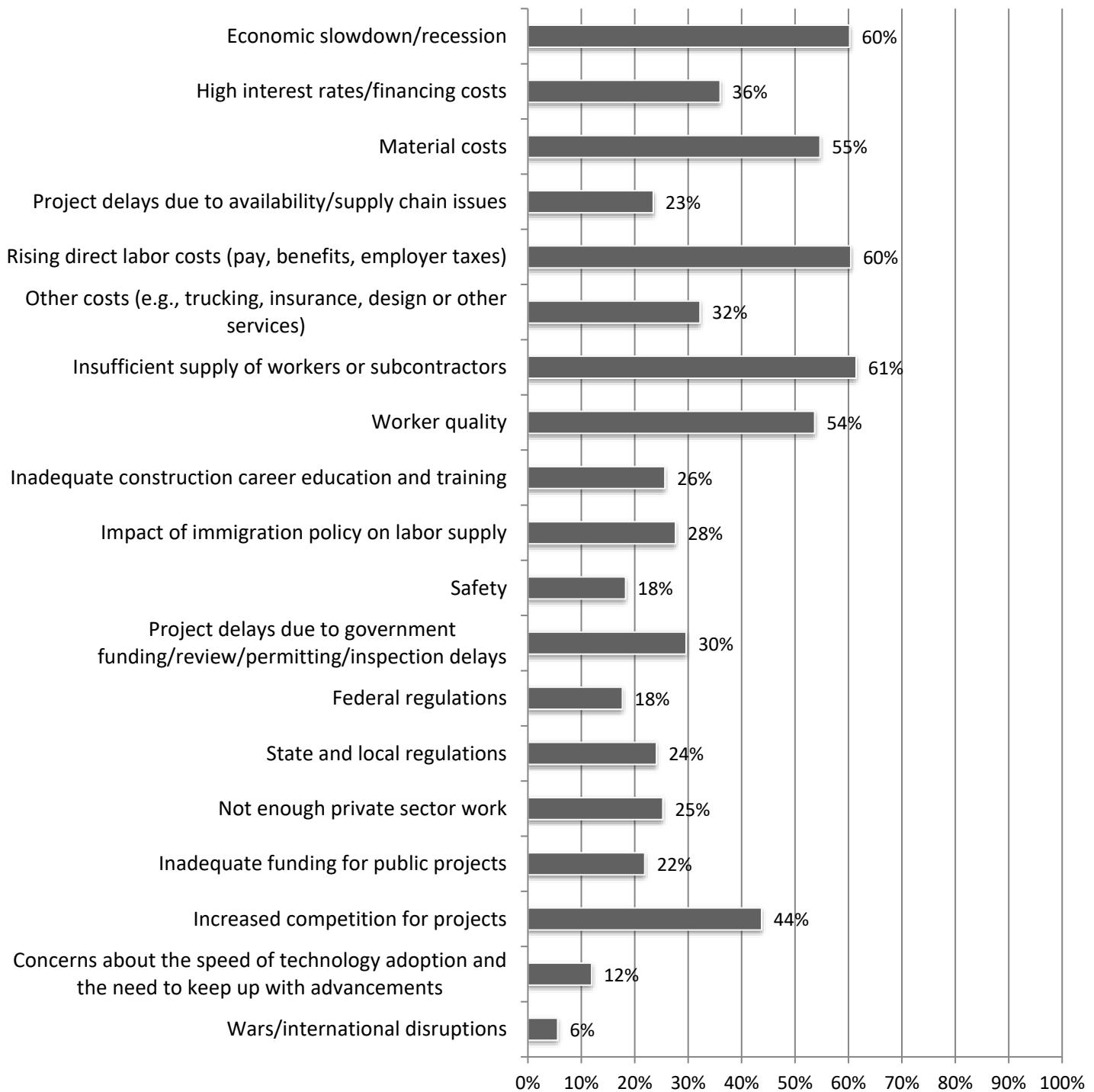


**13. Has your firm been affected by immigration enforcement actions in the past six months? (mark all that apply)**

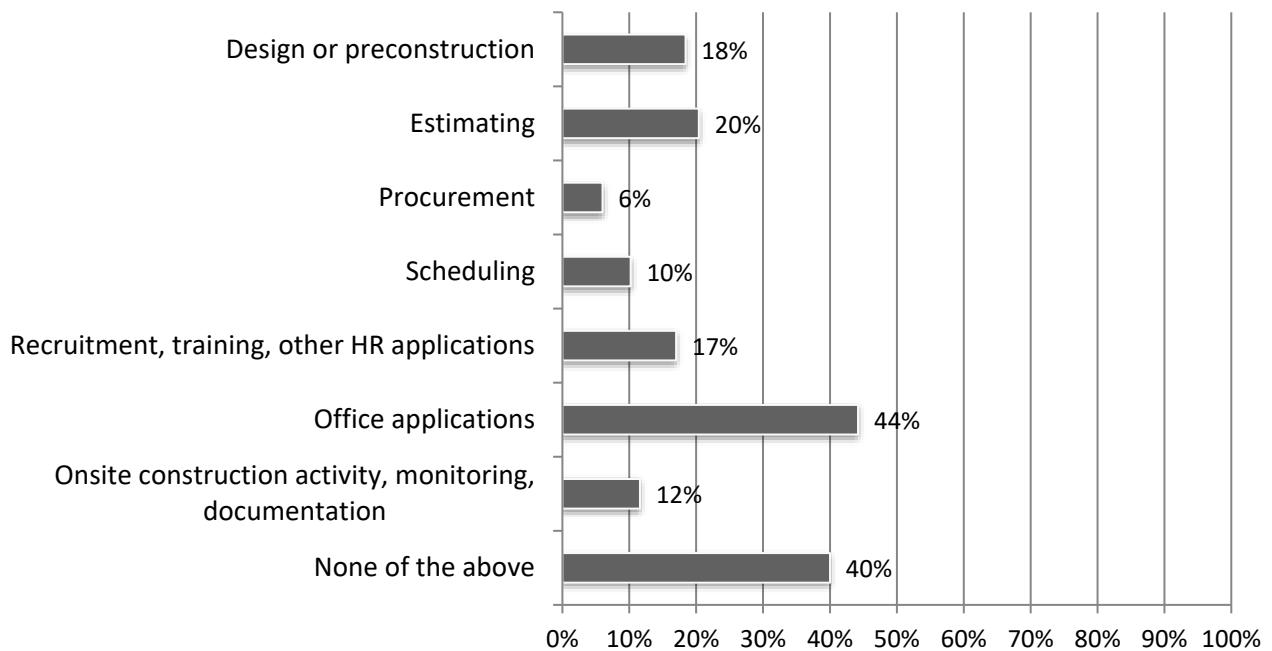
Responses: 505



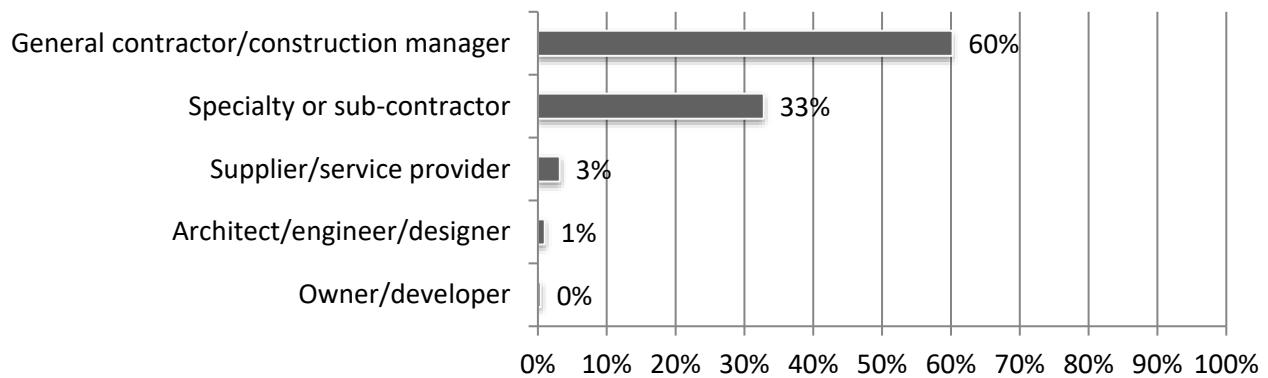
**14. What are your biggest concerns for 2026? (mark all that apply) Responses: 503**



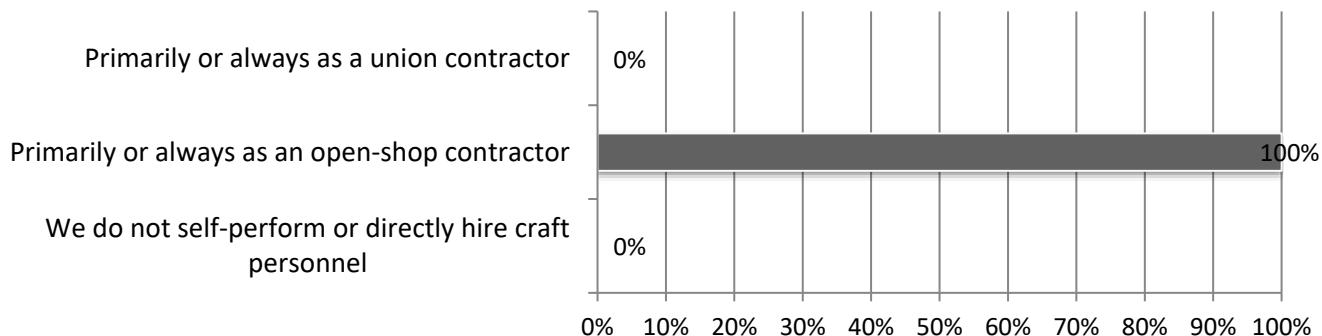
**15. Has your firm initiated or increased its use of artificial intelligence (AI) in the past year for any of the following? Responses: 500**



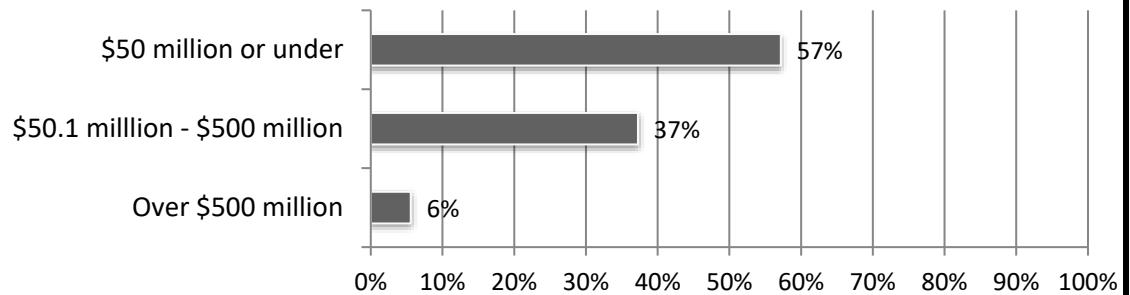
**16. What best describes your firm? Responses: 503**



**17. When you self-perform construction work, do you operate as a union contractor or an open-shop contractor? Responses: 505**



**18. Estimate the total dollar amount of work your firm performed in 2025: Responses: 502**



**19. How many employees does your firm employ? Responses: 502**

