



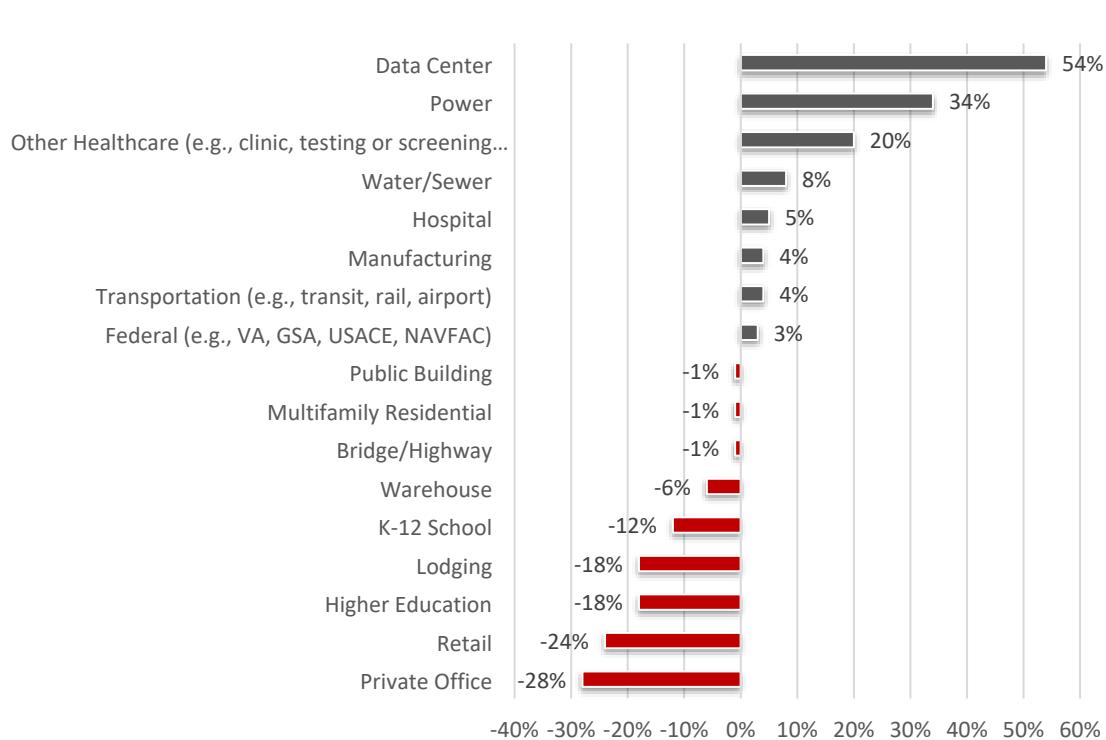
## 2026 Construction Outlook Western Survey Results

*Total Responses: 232. 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: 229

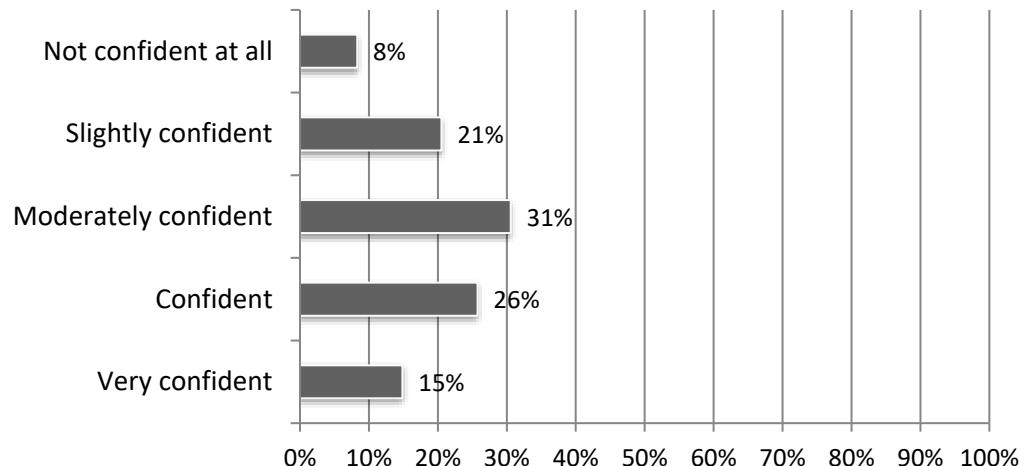
Net % expecting 2026 value of projects to be Higher or Lower than 2025



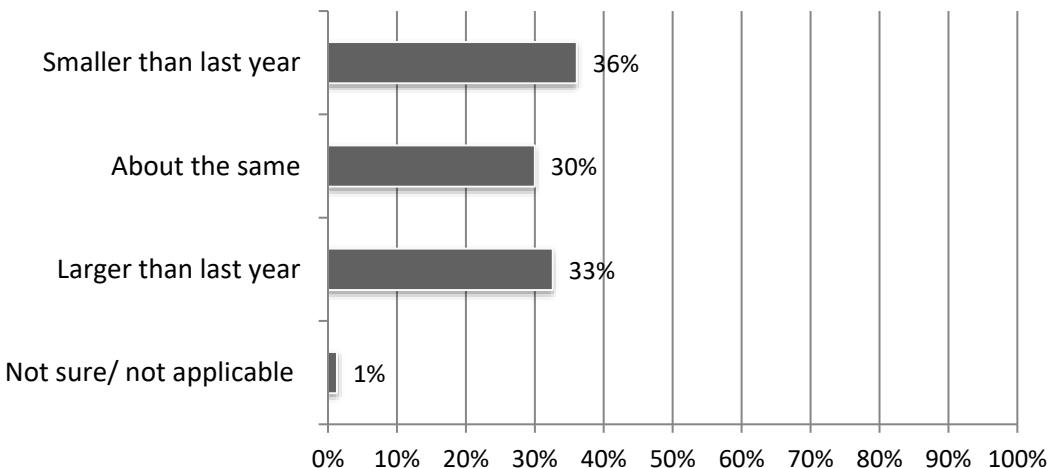
Higher	Lower	Same
65%	11%	24%
45%	11%	44%
35%	15%	50%
29%	21%	50%
28%	22%	50%
32%	27%	41%
30%	26%	45%
29%	26%	45%
26%	27%	46%
31%	32%	37%
28%	29%	44%
25%	31%	43%
23%	35%	42%
19%	37%	44%
18%	36%	46%
18%	42%	40%
17%	45%	38%

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

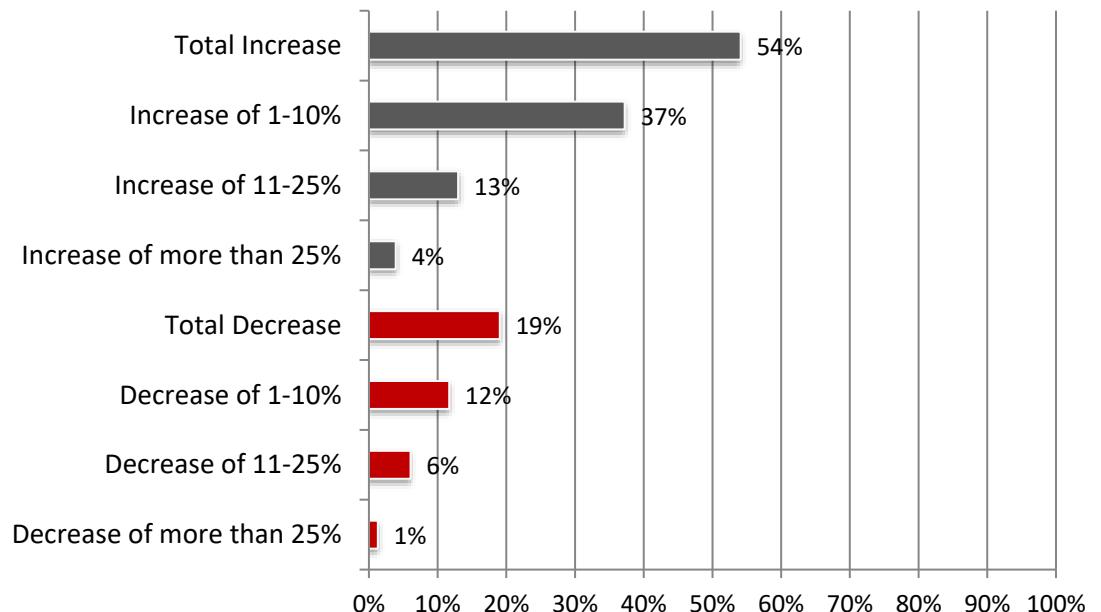
2. How confident are you in your firm's backlog and bidding pipeline going into 2026? Responses: 229



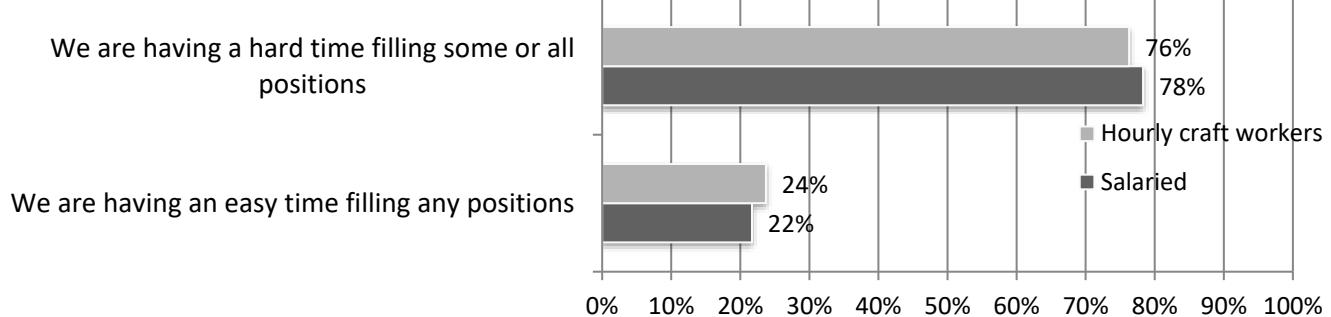
3. How does your firm's backlog compare to this time last year? Responses: 230



4. What percentage change do you expect in your headcount in 2026? Responses: 231



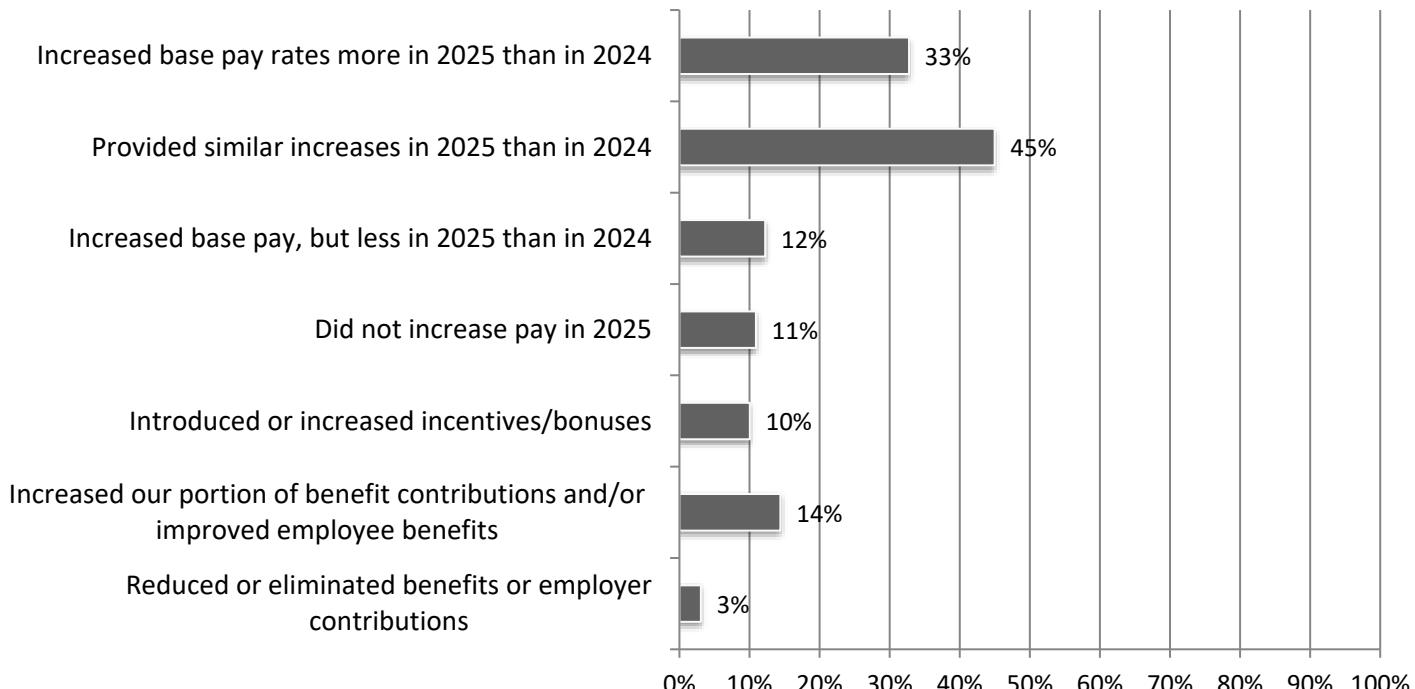
5. Describe your difficulty in filling open positions: Responses: Craft 229; Salaried 230



6. Do you expect any changes in the availability of hourly craft or salaried personnel over the coming 12 months? Responses: Craft 231; Salaried 231

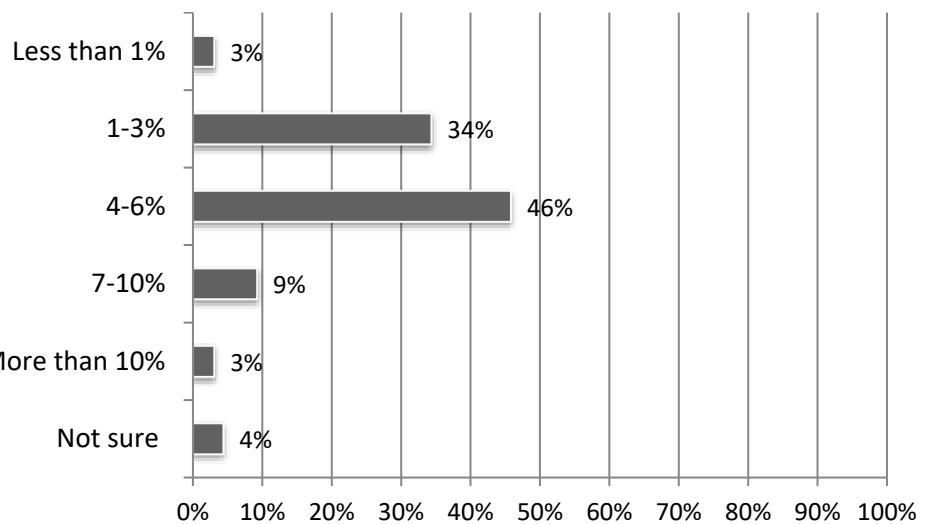


7. What changes did your firm make in pay or benefits in 2025? (mark all that apply) Responses: 229

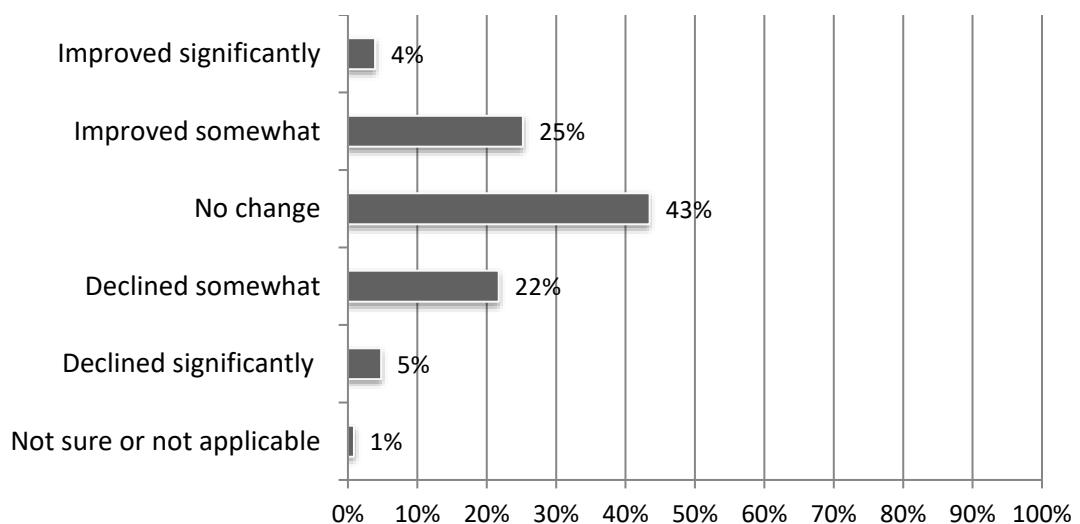


8. For employees whose pay increased in 2025, approximately what was the average percentage increase?

Responses: 227



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: 230



**10. How has your firm responded to supply-chain issues in 2025, if any? (mark all that apply) Responses: 228**

We have not had any significant supply chain problems

44%

We have turned to alternative suppliers

25%

We have specified alternative materials or products

25%

We have stockpiled items before winning contracts

11%

We have accelerated purchases after winning contracts

44%

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

13%

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

14%

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: 229**

No

30%

Financing unavailable or too expensive

38%

Increasing materials or labor costs

26%

Lengthening or uncertain completion times

15%

Changes in demand/need due to tariffs

15%

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

29%

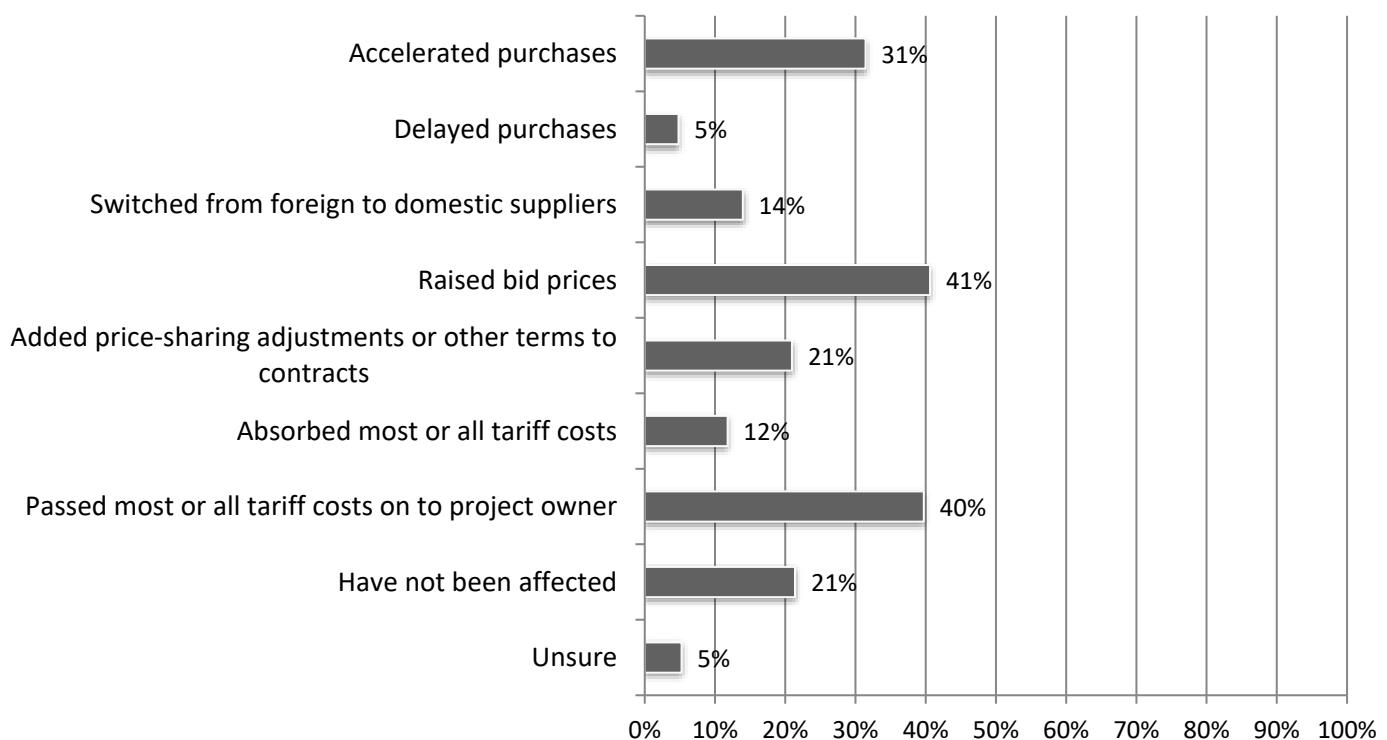
Lack of funding or funding uncertainty (federal, state, or private)

45%

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

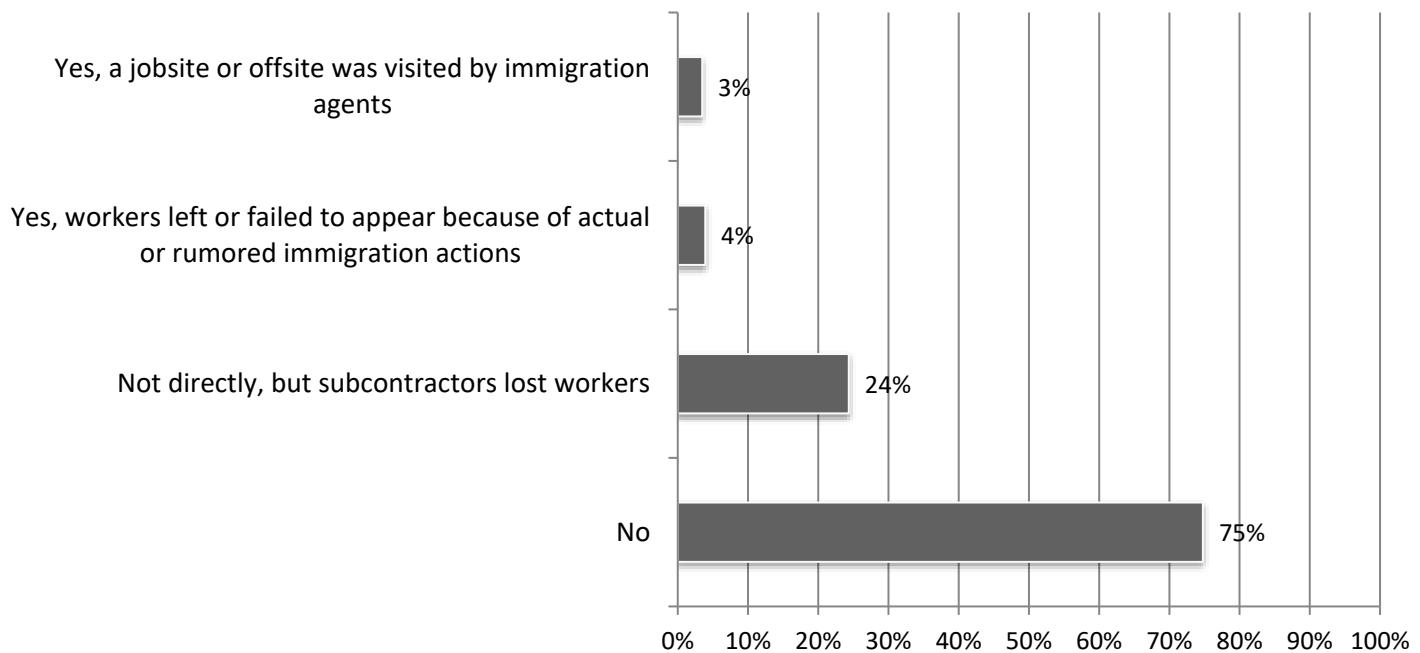
**12. What actions, if any, has your firm taken in response to actual or proposed tariffs? (mark all that apply)**

Responses: 229

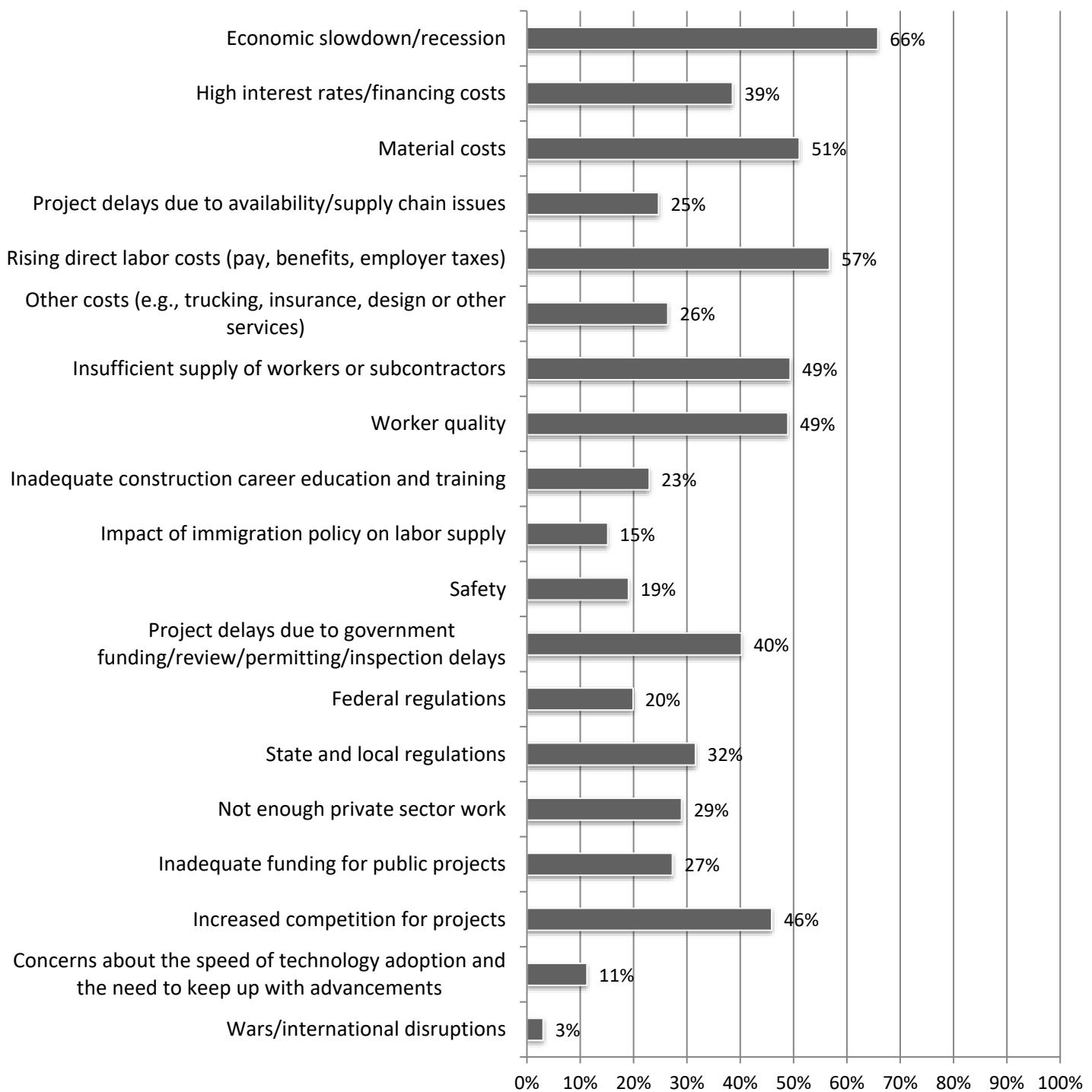


**13. Has your firm been affected by immigration enforcement actions in the past six months? (mark all that apply)**

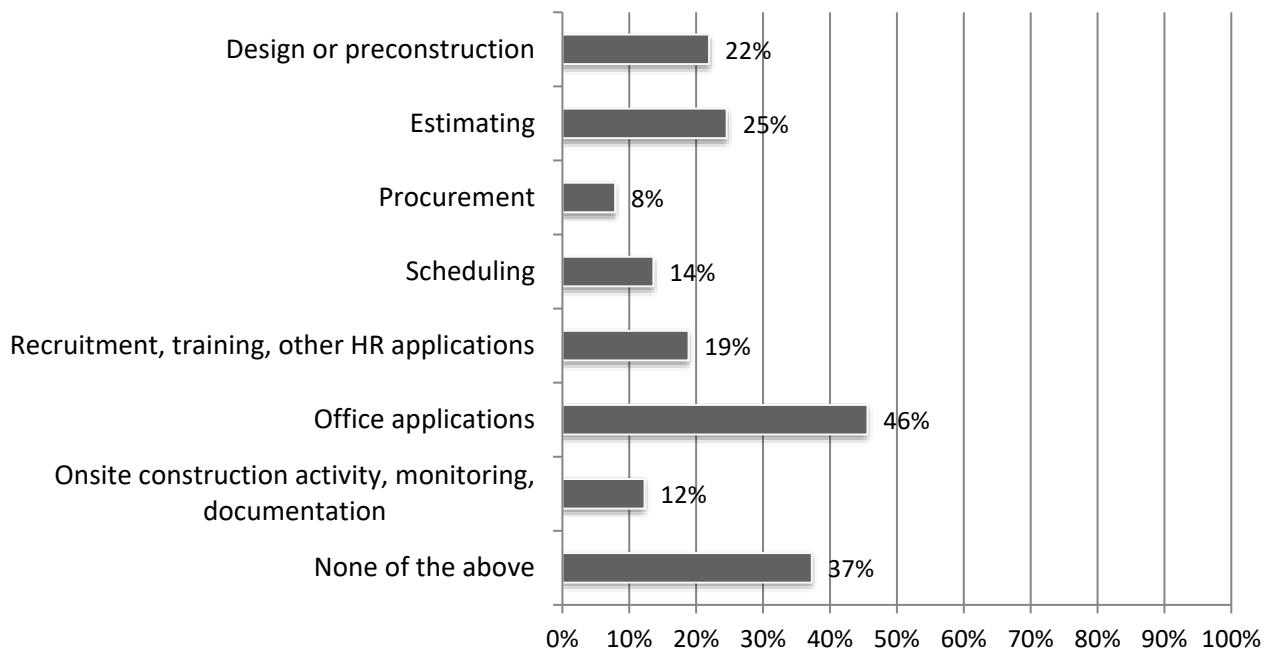
Responses: 230



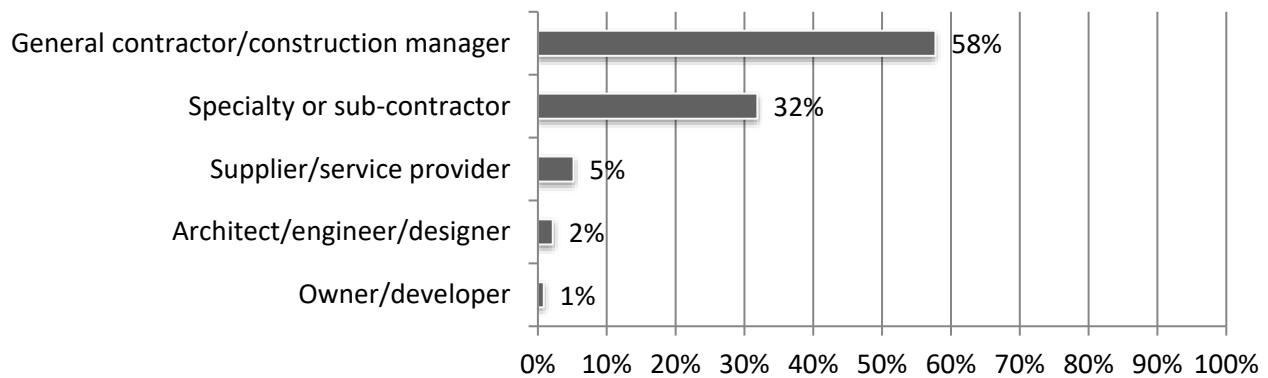
14. What are your biggest concerns for 2026? (mark all that apply) Responses: 231



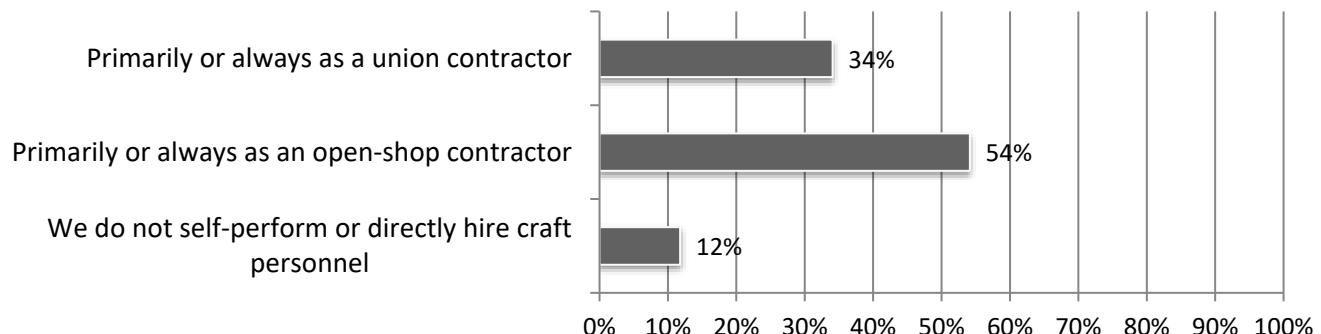
**15. Has your firm initiated or increased its use of artificial intelligence (AI) in the past year for any of the following? Responses: 228**



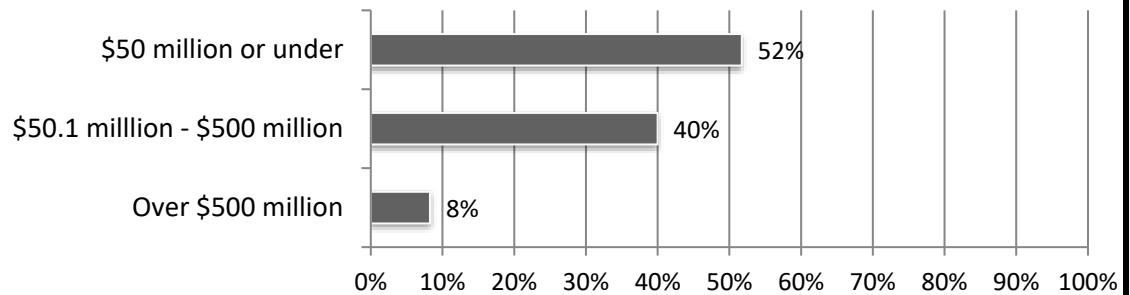
**16. What best describes your firm? Responses: 232**



**17. When you self-perform construction work, do you operate as a union contractor or an open-shop contractor? Responses: 229**



**18. Estimate the total dollar amount of work your firm performed in 2025: Responses: 230**



**19. How many employees does your firm employ? Responses: 228**

