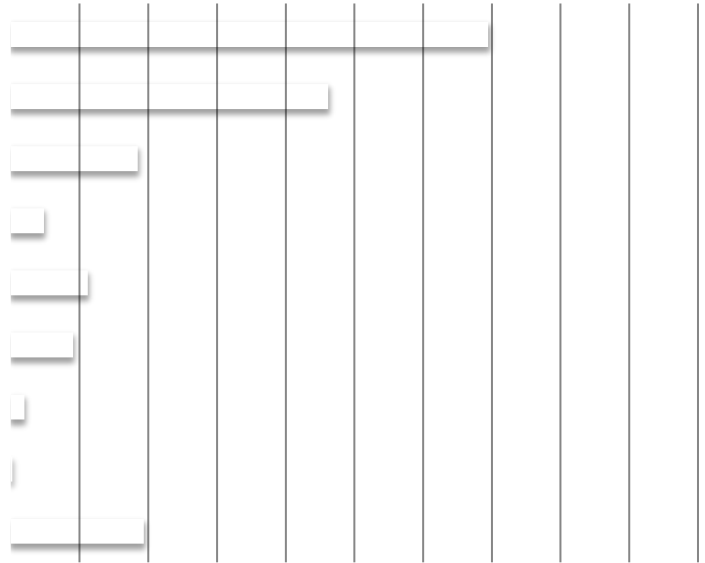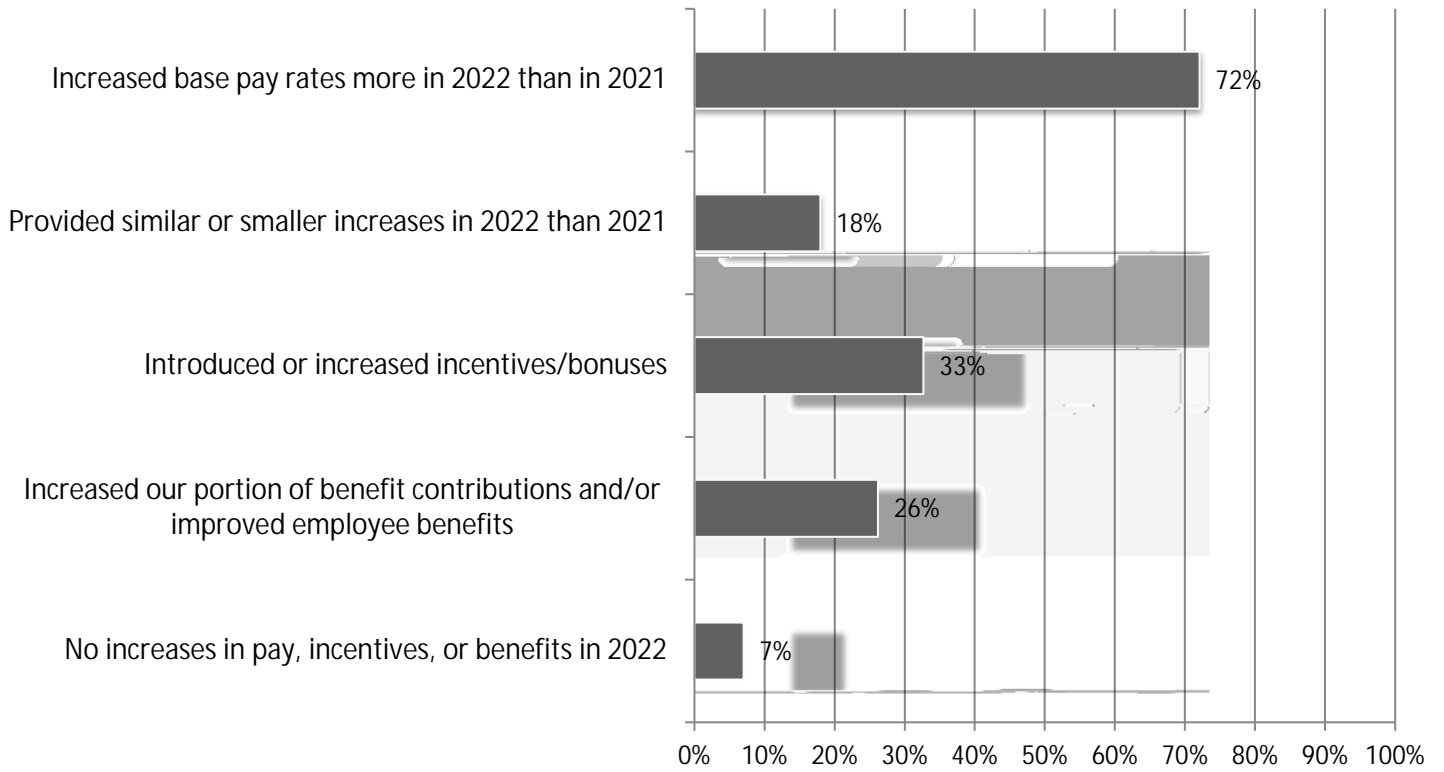| Market | Higher | Lower | Same | Net* | 2022 Net |
|--------|--------|-------|------|------|----------|

2. What percent change do you expect in your headcount in 2023? Responses: 1,018



3. How would you describe your current situation in filling salaried and hourly craft positions? Responses: 1,012

4. Do you expect any changes in the availability of hourly craft or salaried personnel over the coming 12 months? Responses: 1,003

5.  **What changes did your firm make in pay or benefits in 2022? (mark all that apply) Responses: 985**

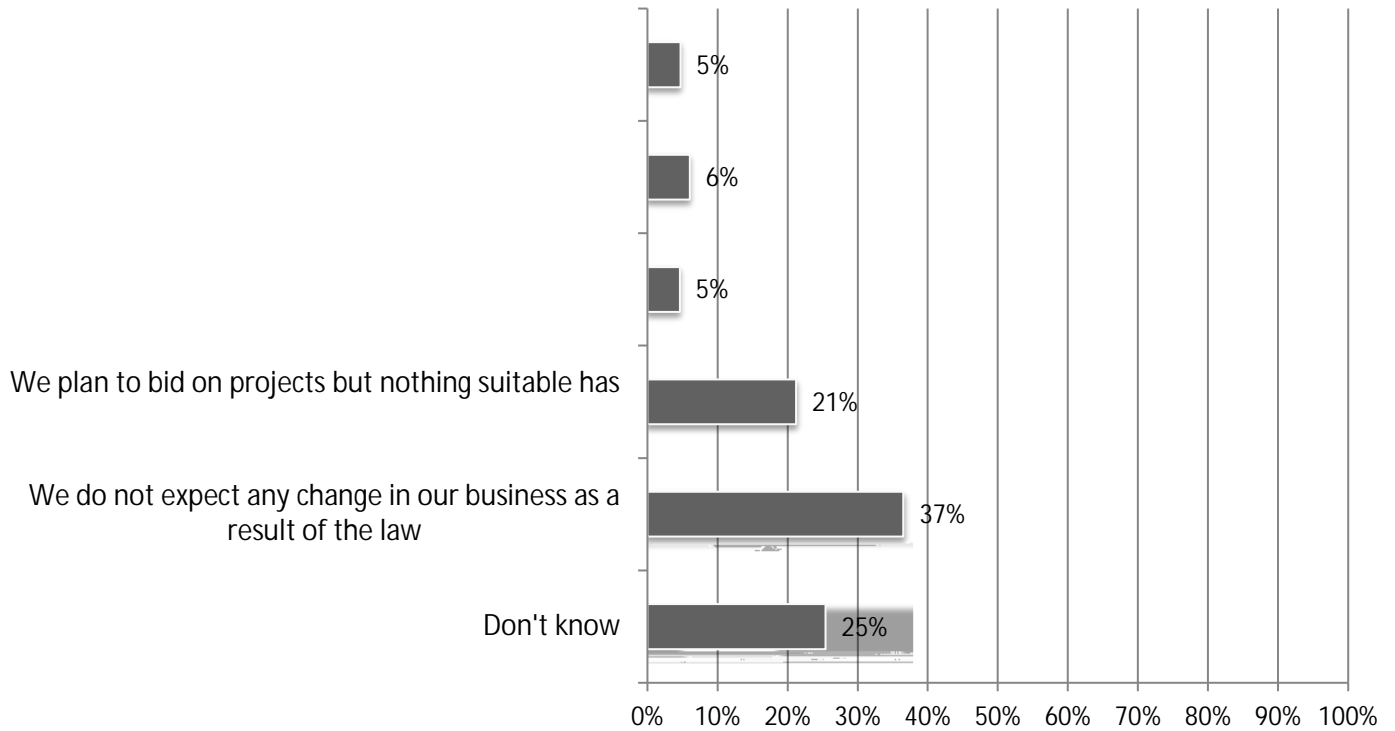| Change | Percentage |
|---|---|
| Increased base pay rates more in 2022 than in 2021 | 72% |
| Provided similar or smaller increases in 2022 than 2021 | 18% |
| Introduced or increased incentives/bonuses | 33% |
| Increased our portion of benefit contributions and/or improved employee benefits | 26% |
| No increases in pay, incentives, or benefits in 2022 | 7% |

6.  **How has your firm responded to supply-chain issues in 2022, if any? (mark all that apply) Responses: 971**

7.  **Do you anticipate purchasing/leasing new work vehicles or equipment in 2023? Responses: 984**

| Response | Percentage |
|----------|-----------|
| Yes | 59% |
| No | 26% |
| Uncertain | 15% |
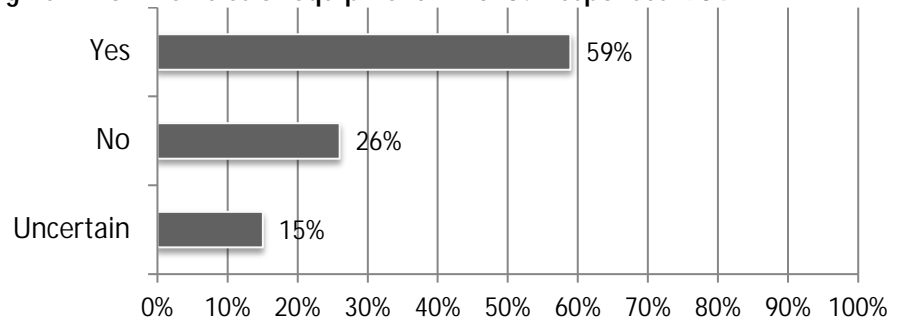
8.  **What difference, if any, has the Infrastructure Investment and Jobs Act of 2021 (the "Bipartisan Infrastructure Law") made to your business? Responses: 972**

| Response | Percentage |
|----------|-----------|
| | 5% |
| | 6% |
| | 5% |
| We plan to bid on projects but nothing suitable has | 21% |
| We do not expect any change in our business as a result of the law | 37% |
| Don't know | 25% |

9.  **Did an owner postpone or cancel any projects that were scheduled to start in 2022 or 2023? (mark all that apply) Responses: 964**

**10. If projects were postponed or canceled, what was the main reason? Responses: 787**
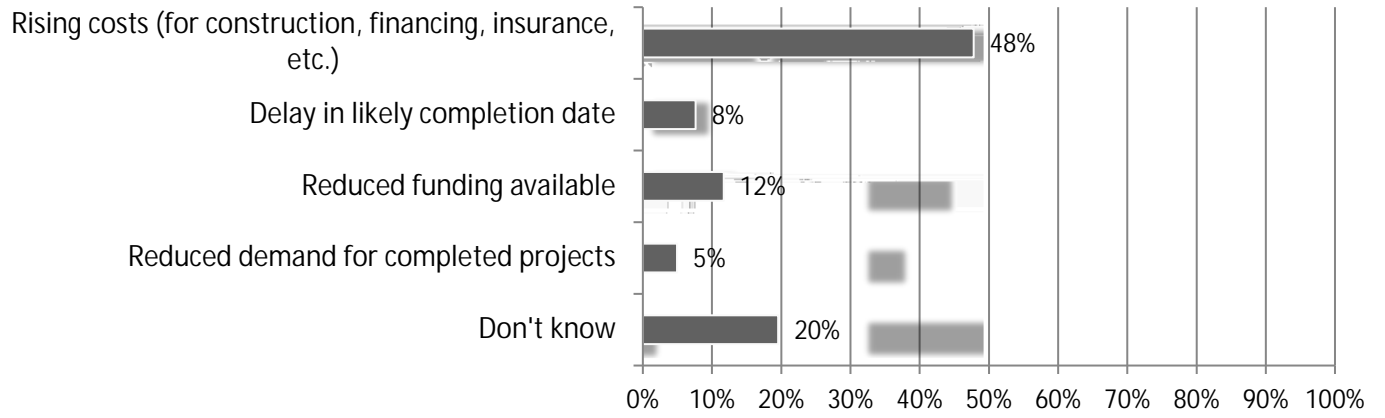


**11. What are your biggest concerns for 2023? (mark all that apply) Responses: 956**

12. What challenges, if any, do you see regarding the safety and health of your firm's workers? (mark all that apply) Responses: 861



83%

12%

6%

27%

23%

0%

13. Compared to 2022, will your firm's 2023 investment in the following technologies change? (mark all that apply) Responses: 925

|  | Increase | Decrease | No change |
|---|---|---|---|
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |

**14. How does your company plan to use mobile software technology? (mark all that apply) Responses: 909**

| | |
|---|---|
| | 68% |
| Scmecs | 61% |
| | 58% |
| | 56% |
| | 47% |
| | 41% |
| | 40% |
| | 40% |
| Scheduling | 35% |
| Submittals and commitments | 35% |
| Change management | 27% |
| Reports to owners, regulatory compliance reports | 27% |
| Estimating GPS tracking (e.g. fleet tracking) | 25% |
| Building Information Modeling (BIM) | 21% |
| Material acceptance at the job site | 17% |
| Inventory tracking | 16% |
| Processing service work orders in the field | 13% |
| No plan to use mobile technology software | 8% |
| Don't know | 7% |
| Processing payments in the field | 6% |

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

15.  Does your firm currently have a formal IT plan to support your business objectives? Responses: 929

16.  What are your biggest IT challenges (mark all that apply)? Responses: 913

20. Estimate the total dollar amount of work your firm performed in 2022. Responses: 913

21. How many total employees does your firm employ at all of its locations? Responses: 915