

EXECUTIVE SUMMARY & KEY FINDINGS

The 2016 Union Labor Supply Survey was conducted by The Association of Union Constructors (TAUC) in conjunction with the Construction Labor Research Council (CLRC). This is the **ONLY** union-specific study focusing on construction and maintenance. The findings will help create a detailed, **data-driven** picture of the current state of the labor supply throughout the United States.

TAUC launched the Union Labor Supply Survey in 2015 ([you can read the full results and download a free copy of last year's survey report by clicking here](#)). It received a tremendous response from a wide cross-section of the entire industry – nearly 1,000 contractors, labor representatives, owner-clients and construction association representatives completed the survey.

This year's survey has been enhanced based on feedback from last year's respondents. You asked for more data, and we heard you! The 2016 Union Labor Supply Survey drills down even further into the specifics of both regional and national labor supply trends. Our goal is to provide the industry with an even more robust set of metrics. TAUC and its partners in labor believe that a data-driven approach is the only way to achieve our shared goals of planning for the future and increasing union market share.

Study Focus

This study covers the following topics:

- Overall growth in construction and maintenance work opportunities (union and nonunion)
- Labor supply for union craft workers overall and for 14 specific unions, covering:
 - Recent history
 - Projections for 2016
 - Apprenticeship levels
- Time taken to fill union craft labor needs

Key Features

A number of features make this study a timely and useful resource for those interested in the construction and maintenance industry.

- The population from which the large sample (N=792) was drawn is knowledgeable and engaged regarding the topic of craft labor supply.
- Respondents were instructed to describe their **own experiences**, not their perceptions of others' experiences or what they may have read, which should enhance the validity of the results.
- Thorough and detailed analyses of the data were conducted.
- A large amount of craft-by-craft specific results are presented in the body and appendix of the report.
- Detailed analyses, including data cuts by the four demographic variables (i.e., role, industry, region, organization size), are presented throughout the report.
- Many charts and graphs are included to make interpretation of the findings easy and accurate.

Sample Demographics

The demographic characteristics of the sample are shown in the tables below for the following categories:

- Respondent role
- Industry
- Geographic region
- Organization size

Role	Percent of Sample	
	2015	2016
Association	11%	2%
Construction Manager	5%	2%
Contractor/Sub	44%	45%
Owner/Client	3%	4%
Union/Labor Representative	33%	46%
Other	4%	1%
Total	100%	100%

Industry	Percent of Sample	
	2015	2016
Civil	5%	3%
Commercial	41%	43%
Manufacturing	17%	16%
Petro/Natural Gas/Chemical	13%	13%
Utility	18%	20%
Other	6%	5%
Total	100%	100%

Region	Percent of Sample	
	2015	2016
New England	3%	12%
Middle Atlantic	19%	19%
Southeast	6%	14%
East North Central	48%	30%
West North Central	8%	9%
South Central	5%	5%
Mountain Northern Plains	3%	4%
Northwest	3%	3%
Southwest	6%	5%
Total	100%	100%

Organization Size	Percent of Sample
	2016
1-25	10%
26-100	12%
101-500	30%
501-1,000	14%
1,001-5,000	15%
5,001-10,000	4%
More than 10,000	15%
Total	100%

SUMMARY & KEY FINDINGS

1. Management vs. Labor

The results clearly show that management (i.e., association representatives, construction managers, contractors/subcontractors, owner/clients) had much less positive or optimistic evaluations than union/labor representatives. This was true for:

- 1) Overall construction and maintenance growth projections (**see Section II, Exhibit 2.3**),
- 2) Union craft labor supply (**see Section III, Exhibit 3.2**),
- 3) Time taken to fill union craft jobs (**see Section III, Exhibits 3.7-3.10**) and
- 4) A large percent of the craft specific analyses (**Section VI, Exhibits 6.1-6.42**).

Stated differently, the union/labor contingent was the most positive about growth prospects, the least concerned about union craft labor shortages and rated the time lapse in filling union craft jobs the shortest. This theme was one of the most prominent throughout the study, and often the differences among the management roles and the union/labor role were large enough to achieve statistical significance ($p < .05$).

2. Growth in Construction and Maintenance Work Opportunities

Projections for growth in construction and maintenance work opportunities were still present in over half of the sample, but the optimism was tempered among some for 2016 compared to 2015. Even so, a plurality of respondents thought there would be very strong growth in 2016, so there was greater diversity in opinions about growth in work opportunities this year than last year.

3. Union Craft Labor Supply

The union craft labor supply, the crux of the study, showed about an even split between those who thought there was a shortage (52%) and those who thought there was not (i.e., either there was a surplus or the union craft

labor supply in their organization was the right size).

About a fourth (23%) of the respondents reported a shortage of at least 4% in their organization. Carpenters, Plumbers/Pipefitters/Steamfitters and Electricians exhibited the largest shortage pervasiveness. Teamsters had the smallest percent of respondents reporting a shortage in their organization. Only three crafts—Boilermakers, Carpenters and Iron Workers—had a smaller reported shortage in 2016 than in 2015.

These results beg the questions: How do these results for the current time period (2015 and 2016) compare to other time periods? Are these results to be interpreted as benign, somewhat concerning or alarming? What are “normal” or baseline results to which these data can be benchmarked?

Since this is only the second year for this report, answers to those questions are not fully available. However, within a few short years trends will emerge and clearer answers to these questions will be available. Moreover, a surplus can be problematic. Therefore, some sort of union craft labor supply issue or “problem” exists for well over half of the sample, whether it be a large or small shortage, or a surplus (Only 32% said their union craft labor staffing level was the right size.).

4. Industry Differences

The largest industry represented by far, commercial/institutional, had the second highest growth projections and the lowest worker shortage ratings. This suggests “better” health for this industry, relatively speaking, compared to the other industries. That does not mean individual organizations will not experience labor supply challenges, just that they may be less likely in the commercial/institutional sector than in other industries. Results for the second largest industry reported in the sample, utility, were somewhat counterintuitive in that low growth was projected yet it also carried the largest worker shortage evaluations for 2015.

5. Regional Variation

The greatest growth was projected for three of the four corners of the United States: New England, the Southeast and the Northwest. New England and the Southeast had elevated concerns regarding staffing levels compared to other regions; thus, combined with their stronger growth expectations, those regions may be expected to have some of the strongest challenges meeting union labor craft supply needs. The Northwest region had the fewest concerns (compared to the other regions) regarding adequate staffing, so that provides some labor supply relief since good growth was also projected there. The low growth prospects for the largest region, the East North Central region, were met with lower shortage ratings as well, so labor supplies may be less stressed there than other regions.