2020 Workforce Survey Results

Open-Shop Results

Total responses: 764, but number varies by question.

1. How has your firm's headcount changed as a result of the pandemic? (Mark all that apply) Responses: 758

   - Furloughed or terminated employees: 23%
   - Terminated employees: 17%
   - Furloughed employees: 13%
   - Recalled or added employees: 31%
   - Added employees: 26%
   - Recalled employees: 9%
   - No change: 53%

2. By what percentage has your firm’s headcount changed in the past 12 months? Responses: 759

   - Reduced headcount: 36%
   - Increased headcount: 31%
   - No change: 33%
3. Did you furlough employees and then recall any? (Mark all that apply) Responses: 760

<table>
<thead>
<tr>
<th>Response</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>No, did not furlough any employees</td>
<td>74%</td>
</tr>
<tr>
<td>Have not tried to recall furloughed employees</td>
<td>6%</td>
</tr>
<tr>
<td>Tried to recall furloughed employees</td>
<td>21%</td>
</tr>
</tbody>
</table>

4. Among firms that tried to recall employees; Response: 156

<table>
<thead>
<tr>
<th>Reason</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>All furloughed employees reported when recalled</td>
<td>55%</td>
</tr>
<tr>
<td>Some recalled employees have refused to work</td>
<td>45%</td>
</tr>
<tr>
<td>Some cited preference for unemployment benefits</td>
<td>34%</td>
</tr>
<tr>
<td>Some cited virus concerns or family responsibilities</td>
<td>32%</td>
</tr>
<tr>
<td>Some cited other reasons (or unknown)</td>
<td>17%</td>
</tr>
</tbody>
</table>

5. How would you describe your current situation in filling hourly craft or salaried positions? Responses: 759

- Salaried: 762

<table>
<thead>
<tr>
<th>Situation</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>We are having a hard time filling some or all positions</td>
<td>63%</td>
</tr>
<tr>
<td>We are having no difficulty filling any positions</td>
<td>28%</td>
</tr>
<tr>
<td>We have no openings for positions</td>
<td>22%</td>
</tr>
<tr>
<td>We are having no difficulty filling any positions</td>
<td>15%</td>
</tr>
<tr>
<td>We have no openings for positions</td>
<td>16%</td>
</tr>
</tbody>
</table>
6. How many unfilled hourly craft or salaried positions did you have on June 30, 2020? Responses: 763 Salaried; 762 Craft

7. Has your firm added or increased use of the following to provide workers in the last 6 months? (Mark all that apply) Responses: 757
8. Has your firm made changes in hiring, training or scheduling in the last 6 months? (Mark all that apply) Responses: 756

- No changes: 36%
- Have not tried to hire: 13%
- Initiated or increased spending on training and professional development: 22%
- Initiated or increased online or mobile training options: 20%
- Overtime: 19%
- Increased use of learning program with a strong online/video component (e.g., held classes using Zoom and Teams): 18%
- Augmented/mixed/virtual reality training devices: 12%
- Lowered hiring standards (e.g., education, training, employment or arrest record): 12%
- Raised hiring standards: 7%
- Trained personnel in Lean construction methods: 5%
- Decreased or eliminated spending on training and professional development: 3%
- Added Lean construction personnel: 2%
- Other: 2%
9. If your firm is having trouble filling salaried positions, please indicate all the position types you are having trouble filling (Mark all that apply): 287

- Project managers/supervisors: 86%
- Safety personnel: 18%
- Quality control personnel: 13%
- Engineers: 13%
- BIM personnel: 5%
- Lean construction professionals: 4%
- Software/database personnel: 3%
- IT personnel: 2%
- Architects: 2%
- Environmental compliance professionals: 2%
10. If your firm is having trouble filling hourly craft positions, please indicate all the position types you are having trouble filling (Mark all that apply). Responses: 554

<table>
<thead>
<tr>
<th>Position Type</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Laborers</td>
<td>45%</td>
</tr>
<tr>
<td>Carpenters</td>
<td>34%</td>
</tr>
<tr>
<td>Equipment operators-cranes, heavy equipment</td>
<td>32%</td>
</tr>
<tr>
<td>Truck drivers</td>
<td>28%</td>
</tr>
<tr>
<td>Concrete workers</td>
<td>25%</td>
</tr>
<tr>
<td>Mechanics</td>
<td>13%</td>
</tr>
<tr>
<td>Pipelayers</td>
<td>12%</td>
</tr>
<tr>
<td>Cement masons</td>
<td>10%</td>
</tr>
<tr>
<td>Iron workers</td>
<td>10%</td>
</tr>
<tr>
<td>Electricians</td>
<td>9%</td>
</tr>
<tr>
<td>Plumbers</td>
<td>7%</td>
</tr>
<tr>
<td>Installers-other</td>
<td>7%</td>
</tr>
<tr>
<td>Sheet metal workers</td>
<td>6%</td>
</tr>
<tr>
<td>Pipefitters/welders</td>
<td>6%</td>
</tr>
<tr>
<td>Installers-drywall</td>
<td>5%</td>
</tr>
<tr>
<td>Traffic control personnel</td>
<td>5%</td>
</tr>
<tr>
<td>Painters</td>
<td>4%</td>
</tr>
<tr>
<td>Roofers</td>
<td>4%</td>
</tr>
<tr>
<td>Bricklayers</td>
<td>3%</td>
</tr>
<tr>
<td>Millwrights</td>
<td>2%</td>
</tr>
</tbody>
</table>
11. Has your firm adjusted pay and/or benefits for hourly craft or salaried personnel in the last 6 months? (Mark all that apply) Responses: 759

- Increased base pay rates: 49%
- Provided incentives/bonuses: 21%
- Increased our portion of benefit contributions and/or improved employee benefits: 10%
- Reduced base pay rates: 2%
- Reduced our portion of benefit contributions and/or scaled back employee benefits: 1%
- No change: 42%

12. What technologies (hardware or software) have you employed recently to help alleviate any labor shortages your firm has experienced? (Mark all that apply) Responses: 721

- Project Management: 16%
- Estimating: 13%
- Field Collaboration: 12%
- Workforce Management: 11%
- Bidding: 10%
- Site Safety: 10%
- Document / File Management (e.g., high school, college, career & technical education): 9%
- Cost Management/ ERP: 6%
- Adopted or increased Lean construction methods: 6%
- Virtual/Augmented/Mixed Reality: 5%
- Reality Capture: 2%
- Other: 2%
- No changes: 61%
13. What impact, if any, has the pandemic had on your firm’s projects? (Mark all that apply) Responses: 756

- Some projects have been halted, postponed or canceled: 64%
- Scheduled projects have been postponed or canceled: 59%
- Projects under way have been halted: 29%
- We have won additional projects or add-ons to current projects: 13%
- No impact: 10%
- Projects have taken longer than we anticipated: 46%
- Costs have been higher than we anticipated: 35%
- We have put longer completion times into our bids or contracts: 25%
- We have put higher prices into our bids or contracts: 18%
- Projects have taken less time or cost less than we anticipated: 1%
- Other: 9%

14. What impact, if any, has the pandemic had on your firm’s safety and health program or performance? Responses: 760

- More reportable injuries and illness: 8%
- More jobsite hazards (physical and or behavioral) identified in inspection reports: 10%
- More workers compensation claims: 2%
- No change: 74%
- Fewer reportable injuries and illnesses: 4%
- Fewer jobsite hazards (physical and/or behavioral) identified in inspection reports: 1%
- Fewer workers compensation claims: 1%
15. If Congress takes further action to address the economic fallout from the coronavirus, which of these measures would be helpful to your business? (Mark all that apply) Responses: 735

- Enact a “safe harbor” set of protocols to provide firms with protection from tort or employment liability for failing to prevent a covid-19 infection: 56%
- Larger federal investment in infrastructure (e.g. transportation, schools, water, etc): 53%
- Addressing federal unemployment benefits that serve as artificial barriers to returning people to work: 44%
- More funding for loan programs to maintain cash flows: 30%
- Funding for state departments of transportation to help prevent project delays as a result of lost revenue from the pandemic: 28%
- Enact a pandemic risk insurance/covid-19 business and employee continuity and recovery fund: 25%
- Funding for direct federal and federal-aid construction projects to compensate employers during project delays or shutdowns due to coronavirus: 24%
- Multi-year surface transportation reauthorization with higher funding levels: 23%
- Addressing the funding shortfalls for multi-employer pension plans: 3%
- No additional legislation is needed: 10%
- Other: 3%

16. When do you expect your firm’s volume of business will return to its normal level relative to one year earlier? Responses: 759

- Volume of business already matches or exceeds year-ago level: 33%
- 1-6 months: 13%
- More than 6 months (or never): 33%
- Don’t know: 20%
17. How do you expect your firm's headcount to change in the next 12 months? (Mark all that apply). Responses: 761

- Expect to furlough and or terminate employees: 20%
- Expect to terminate employees to reduce headcount: 12%
- Expect to furlough employees temporarily: 11%
- Expect to recall and or add employees: 45%
- Expect to add new employees: 42%
- Expect to recall employees: 4%
- No net change: 37%

18. How many total employees did your firm employ at all of its locations as of June 30, 2020? Responses: 764

- 1-49 employees: 45%
- 50-249 employees: 40%
- 250-499 employees: 7%
- 500 or more employees: 8%
19. Estimate the total dollar amount of work your firm performed during the past 12 months. Responses: 764

- $10 million or less: 36%
- $10.1 million-$50 million: 37%
- $50.1 million-$500 million: 23%
- Over $500 million: 4%

20. Please indicate which of the following types of construction projects your firm performs (Mark all that apply) Responses: 764

- Building construction: 71%
- Highway and transportation: 31%
- Utility infrastructure: 28%
- Federal and heavy: 25%
- Other: 9%
21. When you self-perform construction work, do you operate as a union contractor or an open-shop contractor?  
Responses: 764

- We always operate as a union contractor
- We primarily operate as a union contractor but not always
- We primarily operate as an open-shop contractor but not always
- We always operate as an open-shop contractor
- We do not self-perform or directly hire craft personnel

100%