2020 Workforce Survey Results

South Results

Total responses: 505, but number varies by question.

1. How has your firm’s headcount changed as a result of the pandemic? (Mark all that apply) Responses: 503

- Furloughed or terminated employees: 24%
- Terminated employees: 18%
- Furloughed employees: 12%
- Recalled or added employees: 28%
- Added employees: 23%
- Recalled employees: 7%
- No change: 54%

2. By what percentage has your firm’s headcount changed in the past 12 months? Responses: 503

- Reduced headcount: 37%
- Increased headcount: 27%
- No change: 36%
3. Did you furlough employees and then recall any? (Mark all that apply) Responses: 502

- No, did not furlough any employees: 78%
- Have not tried to recall furloughed employees: 7%
- Tried to recall furloughed employees: 15%

4. Among firms that tried to recall employees; Response: 75

- All furloughed employees reported when recalled: 40%
- Some recalled employees have refused to work: 60%
- Some cited preference for unemployment benefits: 48%
- Some cited virus concerns or family responsibilities: 44%
- Some cited other reasons (or unknown): 23%

5. How would you describe your current situation in filling hourly craft or salaried positions? Responses: 502 Salaried; 504 Craft

- We are having a hard time filling some or all positions: 54%
- We are having no difficulty filling any positions: 16%
- We have no openings for positions: 57%
6. How many unfilled hourly craft or salaried positions did you have on June 30, 2020? Responses: 503 Salaried; 503 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: 501
8. Has your firm made changes in hiring, training or scheduling in the last 6 months? (Mark all that apply) Responses: 502

- Initiated or increased online or mobile training options: 18%
- Initiated or increased spending on training and professional development: 17%
- Increased use of learning program with a strong online/video component (e.g., held classes using Zoom and Teams): 16%
- Overtime: 13%
- Augmented/mixed/virtual reality training devices: 13%
- Lowered hiring standards (e.g., education, training, employment or arrest record): 8%
- Raised hiring standards: 7%
- Trained personnel in Lean construction methods: 6%
- Added Lean construction personnel: 3%
- Decreased or eliminated spending on training and professional development: 2%
- Other: 2%
- No changes: 39%
- Have not tried: 17%
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): 183

<table>
<thead>
<tr>
<th>Position Type</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Project managers/supervisors</td>
<td>82%</td>
</tr>
<tr>
<td>Safety personnel</td>
<td>22%</td>
</tr>
<tr>
<td>Quality control personnel</td>
<td>16%</td>
</tr>
<tr>
<td>Engineers</td>
<td>11%</td>
</tr>
<tr>
<td>BIM personnel</td>
<td>5%</td>
</tr>
<tr>
<td>Lean construction professionals</td>
<td>5%</td>
</tr>
<tr>
<td>Environmental compliance professionals</td>
<td>3%</td>
</tr>
<tr>
<td>Software/database personnel</td>
<td>3%</td>
</tr>
<tr>
<td>IT personnel</td>
<td>3%</td>
</tr>
<tr>
<td>Architects</td>
<td>2%</td>
</tr>
</tbody>
</table>
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: 317
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: 499

- Increased base pay rates: 40%
- Provided incentives/bonuses: 18%
- Increased our portion of benefit contributions and/or improved employee benefits: 7%
- Reduced base pay rates: 2%
- Reduced our portion of benefit contributions and/or scaled back employee benefits: 2%
- No change: 49%

12. What technologies (hardware or software) have you employed recently to help alleviate any labor shortages your firm has experienced? (Mark all that apply) Response: 484

- Project Management: 14%
- Estimating: 12%
- Field Collaboration: 12%
- Site Safety: 12%
- Workforce Management: 11%
- Document / File Management (e.g., high school, college, career & technical education): 10%
- Bidding: 9%
- Adopted or increased Lean construction methods: 7%
- Cost Management/ ERP: 6%
- Virtual/Augmented/Mixed Reality: 5%
- Reality Capture: 2%
- Other: 2%
- No changes: 63%
13. What impact, if any, has the pandemic had on your firm’s projects? (Mark all that apply) Responses: 498

- Some projects have been halted, postponed or canceled: 62%
- Projects under way have been halted: 29%
- Scheduled projects have been postponed or canceled: 57%
- We have won additional projects or add-ons to current projects: 14%
- No impact: 12%
- Projects have taken longer than we anticipated: 43%
- We have put longer completion times into our bids or contracts: 22%
- Costs have been higher than we anticipated: 27%
- We have put higher prices into our bids or contracts: 16%
- Projects have taken less time or cost less than we anticipated: 2%
- Other: 6%

14. What impact, if any, has the pandemic had on your firm’s safety and health program or performance? Responses: 498

- No change: 75%
- More reportable injuries and illness: 7%
- More jobsite hazards (physical and or behavioral) identified in inspection reports: 10%
- More workers compensation claims: 2%
- 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: 486

- 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: 55%
- Larger federal investment in infrastructure (e.g. transportation, schools, water, etc): 49%
- Address federal unemployment benefits that serve as artificial barriers to returning people to work: 44%
- More funding for loan programs to maintain cash flows: 29%
- Funding for state departments of transportation to help prevent project delays as a result of lost revenue from the pandemic: 26%
- Enact a pandemic risk insurance/covid-19 business and employee continuity and recovery fund: 26%
- Multi-year surface transportation reauthorization with higher funding levels: 20%
- Funding for direct federal and federal-aid construction projects to compensate employers during project delays or shutdowns due to coronavirus: 19%
- No additional legislation is needed: 12%
- Address the funding shortfalls for multi-employer pension plans: 5%
- Other: 2%

16. When do you expect your firm’s volume of business will return to its normal level relative to one year earlier? Responses: 488

- Volume of business already matches or exceeds year-ago level: 30%
- 1-6 months: 16%
- More than 6 months (or never): 35%
- Don’t know: 19%
17. How do expect your firm’s headcount to change in the next 12 months? (Mark all that apply). Responses: 497

- Expect to furlough and or terminate employees: 19%
- Expect to terminate employees to reduce headcount: 13%
- Expect to furlough employees temporarily: 7%
- Expect to recall and or add employees: 43%
- Expect to add new employees: 42%
- Expect to recall employees: 3%
- No net change: 39%

18. How many total employees did your firm employ at all of its locations as of June 30, 2020? Responses: 505

- 1-49 employees: 44%
- 50-249 employees: 39%
- 250-499 employees: 7%
- 500 or more employees: 10%
19. Estimate the total dollar amount of work your firm performed during the past 12 months. Responses: 505

20. Please indicate which of the following types of construction projects your firm performs (Mark all that apply) Responses: 505
21. When you self-perform construction work, do you operate as a union contractor or an open-shop contractor? Responses: 489

- We always operate as a union contractor: 6%
- We primarily operate as a union contractor but not always: 3%
- We primarily operate as an open-shop contractor but not always: 6%
- We always operate as an open-shop contractor: 75%
- We do not self-perform or directly hire craft personnel: 10%