2023 Workforce Survey Results

National Results
Total responses: 1,401, but number varies by question.

1. By what percentage has your firm’s headcount changed in the past 12 months? Responses: 1,399

- Reduced headcount: 32%
- Increased headcount: 49%
- No change: 18%

2. How would you describe your current situation in filling hourly craft or salaried positions? Responses: 1,149 Salaried; 1,101 Craft

- We have open positions: 85%

3. Describe your difficulty in filling open positions: Responses: 790 Salaried; 936 Craft

- Among firms with open positions: We are having no difficulty filling any positions
  - Salaried: 14%
  - Craft: 12%

- Among firms with open positions: We are having a hard time filling some or all positions
  - Salaried: 86%
  - Craft: 88%
4. How many unfilled hourly craft or salaried positions did you have on June 30, 2023? Responses: 1,157 Salaried; 1,103 Craft

5. If your firm is having trouble filling salaried positions, please indicate all the position types you are having trouble filling (Mark all that apply): 1,110

<table>
<thead>
<tr>
<th>Position Type</th>
<th>Relative Difficulty in Filling Salaried Positions</th>
</tr>
</thead>
<tbody>
<tr>
<td>Architects (56 firms)</td>
<td>63%</td>
</tr>
<tr>
<td>BIM personnel (147 firms)</td>
<td>62%</td>
</tr>
<tr>
<td>Engineers (302 firms)</td>
<td>74%</td>
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<tr>
<td>Environmental compliance professionals (94 firms)</td>
<td>57%</td>
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<tr>
<td>Estimating personnel (609 firms)</td>
<td>70%</td>
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<tr>
<td>IT personnel (240 firms)</td>
<td>33%</td>
</tr>
<tr>
<td>Lean construction professionals (155 firms)</td>
<td>68%</td>
</tr>
<tr>
<td>Marketing/ sales reps (285 firms)</td>
<td>41%</td>
</tr>
<tr>
<td>Project managers/supervisors (782 firms)</td>
<td>77%</td>
</tr>
<tr>
<td>Quality control personnel (323 firms)</td>
<td>64%</td>
</tr>
<tr>
<td>Safety personnel (402 firms)</td>
<td>49%</td>
</tr>
<tr>
<td>Software/database personnel (131 firms)</td>
<td>40%</td>
</tr>
<tr>
<td>Superintendents (687 firms)</td>
<td>81%</td>
</tr>
</tbody>
</table>
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: 1,065

- Bricklayers (72 firms) 78%
- Carpenters (455 firms) 80%
- Cement masons (189 firms) 79%
- Concrete workers (368 firms) 82%
- Electricians (156 firms) 76%
- Equipment operators-cranes, heavy equipment (448 firms) 77%
- Installers-drywall (126 firms) 71%
- Installers-other (138 firms) 83%
- Iron workers (135 firms) 70%
- Laborers (718 firms) 70%
- Mechanics (297 firms) 79%
- Millwrights (74 firms) 68%
- Painters (86 firms) 64%
- Pipefitters/welders (151 firms) 72%
- Pipelayers (156 firms) 82%
- Plumbers (110 firms) 73%
- Roofers (49 firms) 61%
- Sheet metal workers (87 firms) 70%
- Surveyors (136 firms) 66%
- Traffic control personnel (137 firms) 69%
- Truck drivers (378 firms) 79%

*Relative difficulty in filling hourly craft positions*
7. If you are having a hard time filling available positions, what are the reason(s)? (Mark all that apply) Responses: 1,063

- No openings or no trouble filling available positions: 13%
- Potential employees cannot pass a drug test: 33%
- Potential employees report needing flexible work schedules/option for remote work (e.g., to stay home to care for a loved one): 25%
- Potential employees report difficulty acquiring reliable transportation to and from a jobsite: 26%
- Available candidates are not qualified to work in the industry (lack of skills, etc.): 68%
- Unsure: 10%
- Other: 23%

8. Has your firm added or increased use of the following to acquire workers in the past 12 months? (Mark all that apply) Responses: 1,062

- Added online strategies (e.g., social media, targeted digital advertising) to connect better with younger applicants: 63%
- Applied for employment-based visas (e.g., H-1B, H-2B): 8%
- Engaged with career-building program (e.g., high school, college, career & technical education): 49%
- Engaged with government workforce development or unemployment agency: 25%
- Executive and non-craft worker search firm or professional employer organization: 31%
- Implemented software to distribute job postings and manage applications: 21%
- Staffing firm (craft): 25%
- Sub- or specialty contractors: 21%
- Unions: 22%
- No changes: 10%
- Have not tried to hire: 6%
9. Has your firm made changes in hiring, training or scheduling in the past 12 months? (Mark all that apply) Responses: 1,024

- Augmented/mixed/virtual reality training devices: 14%
- Increased use of learning program with strong online/video component (e.g., held classes using Zoom, Teams, etc.): 25%
- Lowered hiring standards (e.g., education, training, employment, arrest record): 29%
- Raised hiring standards: 6%
- Initiated or increased spending on training and professional development: 41%
- Decreased or eliminated spending on training and professional development: 1%
- Overtime: 20%
- Other: 3%
- No changes: 35%

10. Has your firm adjusted pay and/or benefits for hourly craft or salaried personnel in the past 12 months? (Mark all that apply) Responses: 1,045

- Increased base pay rates: 81%
- Provided incentives/bonuses: 44%
- Increased our portion of benefit contributions and/or improved employee benefits: 26%
- Reduced base pay rates: 1%
- Reduced our portion of benefit contributions and/or scaled back employee benefits: 1%
- No change: 13%
11. Is your firm experiencing project delays due to any of the following? (Mark all that apply) Responses: 1,040

- Shortages of workers (ours or subcontractors’): 61%
- Longer lead times or shortages of materials (please specify in comment box below): 65%
- Transportation/delivery delays: 36%
- Governmental delays (lack of approvals, inspectors, etc.): 35%
- Owner’s directive to halt or redesign project: 31%
- Other: 4%
- No significant delays: 17%

12. Did you have projects canceled, postponed, or scaled back for any of the reasons below? (Mark all that apply) Responses: 1,010

- Increasing costs: 50%
- Lengthening or uncertain completion times: 22%
- Changes in demand/need: 20%
- Financing unavailable or too expensive: 36%
- None of the above: 34%
13. What is your firm’s current policy regarding office workers? (Mark all that apply) Responses: 1,004

- Workers must report to an office full-time: 79%
- Workers can choose which days they work in the office: 23%
- Workers must work from home full-time: 8%

14. Has your firm’s office-work policy changed in the past 12 months? Responses: 1,027

- Our firm allows more work from home than 12 months ago: 9%
- Our firm requires more in-office work than 12 months ago: 13%
- No change: 78%

15. How do expect your firm’s headcount to change in the next 12 months? (Mark all that apply). Responses: 1,030

- We expect to add new employees: 69%
- We expect to recall furloughed/terminated employees: 0%
- We expect to terminate employees to reduce headcount: 4%
- We expect to furlough employees temporarily: 3%
- No net change: 27%
16. Regarding AI and robotics, which statements do you believe when it comes to construction jobs in the next 5 years? (Mark all that apply). Responses: 966

- AI and robotics will have no effect on construction jobs (30%)
- AI and robotics will positively impact construction jobs by automating manual, error-prone tasks (44%)
- AI and robotics will improve the quality of construction jobs and make workers safer and more productive (41%)
- AI and robotics will negatively impact the construction job market by eliminating jobs (17%)

17. Do you agree or disagree that employees at my firm increasingly need digital technology skills to be successful in their roles? Responses: 1,008

- Strongly agree: 47%
- Somewhat agree: 44%
- Somewhat disagree: 7%
- Strongly disagree: 2%

18. Do you agree or disagree that diversifying the current workforce at my firm is critical to strengthening our future business? Responses: 1,002

- Strongly agree: 34%
- Somewhat agree: 43%
- Somewhat disagree: 13%
- Strongly disagree: 10%
19. What proportion of the new hires at your firm come prepared with the requisite digital technology skills on day one? Responses: 1,001

20. Do you agree or disagree that the use of cutting-edge technology helps me recruit talent into my firm? Responses: 1,001

21. How many total employees did your firm employ at all of its locations as of June 30, 2023? Responses: 991
22. What percentage of your firm's employees as of June 30, 2023 were female? Responses: 978

<table>
<thead>
<tr>
<th>Percentage</th>
<th>Responses</th>
</tr>
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<tbody>
<tr>
<td>0%</td>
<td>3%</td>
</tr>
<tr>
<td>1-4%</td>
<td>31%</td>
</tr>
<tr>
<td>5-9%</td>
<td>26%</td>
</tr>
<tr>
<td>10-14%</td>
<td>21%</td>
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<tr>
<td>15%+</td>
<td>19%</td>
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</tbody>
</table>

23. What percentage of your firm’s current workforce do you expect will retire in the next 10 years? Responses: 982

<table>
<thead>
<tr>
<th>Percentage</th>
<th>Responses</th>
</tr>
</thead>
<tbody>
<tr>
<td>0-9%</td>
<td>32%</td>
</tr>
<tr>
<td>10-19%</td>
<td>34%</td>
</tr>
<tr>
<td>20-29%</td>
<td>21%</td>
</tr>
<tr>
<td>30-39%</td>
<td>9%</td>
</tr>
<tr>
<td>40%</td>
<td>4%</td>
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</tbody>
</table>

24. Estimate the total dollar amount of work your firm performed during the past 12 months. Responses: 991

<table>
<thead>
<tr>
<th>Dollar Amount</th>
<th>Responses</th>
</tr>
</thead>
<tbody>
<tr>
<td>$10 million or less</td>
<td>25%</td>
</tr>
<tr>
<td>$10.1 million-$50 million</td>
<td>35%</td>
</tr>
<tr>
<td>$50.1 million-$500 million</td>
<td>31%</td>
</tr>
<tr>
<td>Over $500 million</td>
<td>9%</td>
</tr>
</tbody>
</table>
25. Please indicate which of the following types of construction projects your firm performs (Mark all that apply)
Responses: 991

- Building construction: 70%
- Highway and transportation: 32%
- Utility infrastructure: 31%
- Federal and heavy: 34%
- Other: 13%

26. When you self-perform construction work, do you operate as a union contractor or an open-shop contractor?
Responses: 974

- Always as a union contractor: 22%
- Primarily as a union contractor but not always: 6%
- Primarily as an open-shop contractor but not always: 7%
- Always as an open-shop contractor: 54%
- We do not self-perform or directly hire craft personnel: 10%