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## 41 states add construction jobs; ConstructConnect, Dodge, Census starts data show mixed trends

Seasonally adjusted **construction employment** rose year-over-year (y/y) from November 2023 to November 2024 in 41 states and the District of Columbia and declined in nine states, according to AGC's [analysis](#) of Bureau of Labor Statistics data [posted](#) today. Texas added the most construction jobs (32,200 or 3.9%), followed by Florida (28,700 jobs, 4.5%), Ohio (15,400, 6.4%) and Michigan (14,800, 7.8%). Alaska again had the largest percentage increase (20%, 3,600 jobs), followed by Michigan and Hawaii (7.8%, 3,000). California lost the most jobs (-11,500, -1.2%), followed by New York (-4,100, -1.1%) and Maryland (-3,700, -2.3%). Maryland had the largest percentage loss, followed by Oregon (-2.0%, -2,300), Maine (-1.5%, -500), California, and New York. **For the month**, 23 states and D.C. added construction jobs, 23 states lost jobs, and the total was flat in Arkansas, Iowa, Kentucky, and Louisiana. Florida added the most jobs (7,600 or 1.1%), followed by North Carolina (3,800, 1.4%). Minnesota had the largest percentage gain (2.1%, 2,800 jobs), followed by D.C. (2.0%, 300). The largest losses for the month were in Indiana (-3,400 jobs or -2.0%) and California (-2,800, -0.3%). Indiana also had the largest percentage job loss, followed by Delaware (-1.3%, -400). (For D.C., Delaware, and Hawaii, BLS posts combined totals for mining, logging, and construction; AGC treats the changes as all from construction.)

Construction data providers ConstructConnect and Dodge Construction Network reported divergent estimates of the **value of construction starts**. Starts fell 29% y/y in November and 2.3% year-to-date in the first 11 months of 2024 compared to January-November 2023, ConstructConnect [reported](#) today. **Nonresidential building starts** plunged 46% and 9.4%, respectively. **Heavy engineering (civil) starts** rose 9.7% and 17%, respectively. **Residential starts** declined 23% y/y and 7.0% year-to-date. Dodge [reported](#) on Thursday that its measure of **total starts** increased 5% from October to November, seasonally adjusted, and also 5% year-to-date. **Nonresidential building starts** grew 2% and 4%, respectively, **nonbuilding starts** rose 16% and 5%, while **residential building starts** fell 3% in November but rose 7% year-to-date.

**Housing starts** (units) in November decreased 1.8% from October and 15% y/y at a seasonally adjusted annual rate, the Census Bureau [reported](#) on Wednesday. Single-family starts rose 6.4% for the month but slumped 10% y/y. Multifamily (five or more units) starts plunged 24% and 29%, respectively. **Residential permits** rose 6.1% for the month but fell 0.2% y/y. Single-family permits inched up 0.1% for the month but slipped 2.7% y/y. Multifamily permits climbed 22% and 4.8%, respectively. Multifamily units under construction declined for the 14th month in a row, by 2.7% and 21% y/y. Census [released](#) a "new experimental data product featuring monthly single-family housing starts for the West South-Central division. For select areas of interest, Survey of Construction data collected by field representatives have been replaced with estimates derived from satellite imagery and machine learning models to demonstrate the efficacy" of this method.

The **Architecture Billings Index (ABI)** slipped from 50.3 in October, seasonally adjusted, to 49.6 in November, the American Institute of Architects (AIA) [reported](#) on Wednesday. AIA calls the index "a leading economic indicator of construction activity, providing an approximately 9-to-12-month glimpse into the future of nonresidential construction spending activity." The ABI is derived from the share of responding architecture firms that report a gain in billings compared to the previous month less the share reporting a decline in billings, presented on a 0-to-100 scale. "Any score below 50.0 indicates decreasing business conditions....The return of billings to a stable level after nearly two years of decline signals potential improvement across the industry....However, newly signed design contracts have experienced an eighth consecutive month of decline, suggesting that a more robust upturn in design activity is still distant."

U.S. **population** grew by 3.3 million residents between July 1, 2023 and July 1, 2024, or 0.98%, the fastest growth rate since 2001, Census [reported](#) on Thursday. Population changes over time are a major contributor to demand for numerous types of construction, funding for public construction, and supply of potential construction workers. "Improved integration of federal data sources on immigration has enhanced our estimates methodology." As a result, the growth rate for the previous 12 months was revised from 0.49% to 0.83%; only two states lost residents in 2023, not eight as initially estimated. AGC posted a [map](#) showing 2024 changes and a [table](#) ranking all states and D.C. Despite the overall increase, "the number of U.S. children (ages 0 to 17) declined by 0.2%," a negative for long-term demand for school construction. For the first time since 2011, the fastest growth occurred in D.C. (2.2%, 14,926 residents; up from 1.6% in 2023), followed by Florida (2.0%, 467,347; down from 2.3%), Texas (1.8%, 562,941; down from 2.0%), and Utah (1.8%, 60,391; up from 1.5%). Texas added the most residents, followed by Florida and California (232,570, 0.6%). Populations declined very slightly in Mississippi (-0.004%, -127), Vermont (-0.03%, -215) and West Virginia (-0.03%, -516).

Data Digest is a weekly summary of economic news. Sign up [here](#). Editor: [Ken.Simonson@agc.org](mailto:Ken.Simonson@agc.org). Chief Economist, AGC. Go here for [Ken's PPT](#) or more [construction data](#).

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