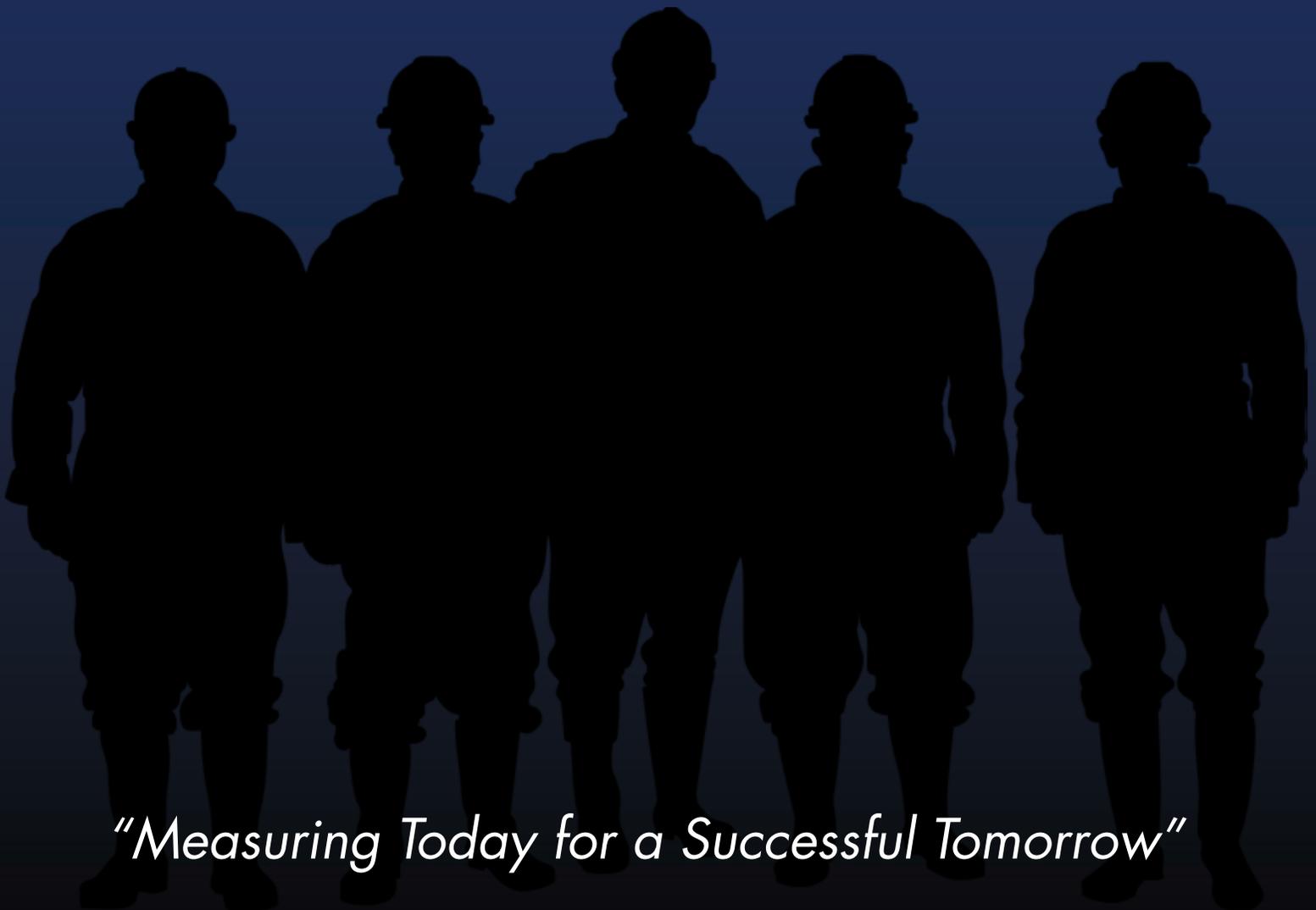




# TAUC 2015: Union Labor Supply Construction & Maintenance Industry



*"Measuring Today for a Successful Tomorrow"*

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Analysis by: Construction Labor Research Council (CLRC)

This union workforce study is the product of a collaborative effort between The Association of Union Constructors (TAUC) and the Construction Labor Research Council (CLRC).

### Purpose

The purpose of this study is to assess the status of the union craft workforce supply in the construction and maintenance industry throughout the United States.

### Study Features

This study features a number of unique and engaging characteristics, making it one of the most useful union craft labor supply reports available.

- Data are presented for each of 14 specific crafts individually, as well as aggregated, including both actual 2014 staffing levels and projections for 2015.
- The study will be annual, which will allow for the development of trend lines in future years and the ability to verify data from a previous year against responses from ensuing years.
- The sample was large, approaching 1,000 respondents, which provides for statistically reliable analyses.
- Useful data cuts for respondent role, geographic region and industry were utilized to offer insights into the results.

### Study Sample Demographics

The table below outlines the characteristics of the sample for this study. A total of 939 responses were received, representing a cross section of roles, regions and industries.

Respondent Role	Geographic Region	Industry
■ Contractor/Subcontractor (44%)	■ East North Central (48%)	■ Commercial (41%)
■ Union/Labor Representative (33%)	■ Middle Atlantic (19%)	■ Utility (18%)
■ Association Employee (11%)	■ West North Central (8%)	■ Manufacturing (17%)
■ Construction Manager (5%)	■ Southeast (6%)	■ Petroleum/Chemical (13%)
■ Owner/Client (3%)	■ Southwest (6%)	■ Civil (5%)
■ Other (4%)	■ South Central (5%)	■ Other (6%)
	■ New England (3%)	
	■ Northwest (3%)	
	■ Mountain Northern Plains (2%)	

### Results for 2014 – Actual/Historical

Just over half of the respondents (52%) reported a union labor shortage in 2014. Most said it was a small shortage (41%) while some experienced a large shortage (11%). Approximately a third said their union workforce was about the correct size (31%) and the remainder (17%) indicated a surplus.

Those more directly responsible for staffing levels contractors, construction managers and owners/clients generally reported more of a labor shortage than did union/labor representatives. Union/labor representatives and association employees were about three times more likely than others to report a labor surplus.

Although modest in terms of respondents, the Mountain Northern Plains and Southeast regions exhibited the greatest concern about labor shortages. The New England and Southwest regions actually reported a small surplus of union craft workers. There was a modest level of concern about craft shortages in the largest respondent geographic region, the East North Central. Regarding the industry data cut, a labor shortage was reported for all industries, with the utility industry having the largest shortage and commercial the smallest.

A strength of this study is the detail it provides regarding each of 14 union crafts in construction and maintenance work. The table below summarizes the average shortage or surplus in 2014 for each of the 14 union crafts. The percent values in parentheses are the average surplus/shortage ratings. For example, a -2.0% means that on average, the respondents had a 2.0% shortage for that craft.

<b>Shortage (More than -0.5%)</b>	<b>About Right (-0.5 up to 0.5%)</b>	<b>Surplus (0.5% or More)</b>
Boilermakers (-3.2%)	Plasterers/Cement Masons (-0.5%)	Sheet Metal Workers (1.7%)
Iron Workers (-1.1%)	Insulators (-0.3%)	Teamsters (1.7%)
Carpenters (-1.1%)	Roofers & Waterproofers (-0.1%)	
Operating Engineers (-0.9%)	Electricians (0.0%)	
Bricklayers (-0.8%)	Laborers (0.0%)	
	Plumbers/Pipefitters/Steamfitters (0.3%)	
	Painters & Allied Trades (0.5%)	

It is important to note that even though the averages may suggest a labor shortage, a labor surplus, or a workforce that is about the right size, individual experiences will vary from this average. Later in the report, greater detail about the staffing levels is provided for each craft listed above.

### Projections for 2015

#### Forecasted Growth/Contraction (union and non-union)

Perhaps the most intriguing aspect of the study is what respondents expect for the future. The overwhelming perspective is positive, for growth. In fact, 72% believe that there will be growth in construction and maintenance activity in 2015. Many respondents foresee growth (defined as 3-10+%) lasting at least two to three years. Most of those who predict contraction see it lasting a short time (less than one year).

Union representatives had the most optimistic stance on growth, with a 5.3% average growth rating. Owners provided the least optimistic ratings at 0.04%, with construction managers not much higher at 0.4%. Contractors, association personnel and other uncategorized respondents clustered together in the 2.0% range.

The greatest growth was projected for the Southeast region (5.6%), followed closely by the Mountain Northern Plains (5.2%). (Definitions of the regions are on page 6.) Although growth was projected for all regions, on average, the Northwest (2.1 percent) region garnered the lowest expectations for growth. The largest region based on the number of respondents, East North Central, also had relatively modest growth ratings at 2.6%.

The highest rated industries for growth were civil (4.9%) and commercial (4.5%). The lowest were utility (1.8%), manufacturing (2.2%) and petro/chemical (2.4%).

### Forecasted Surplus/Shortage (Union Craft Supply)

The table below summarizes the projected average surplus or shortage in 2015 for each of the 14 union crafts.

Shortage (More than -0.5%)	About Right (-0.5 up to 0.5%)	Surplus (0.5% or More)
Boilermakers (-2.2%)	Roofers & Waterproofers (-0.4%)	Sheet Metal Workers (0.9%)
Carpenters (-2.0%)	Painters & Allied Crafts (-0.1%)	Teamsters (1.1%)
Iron Workers (-1.6%)	Insulators (0.1%)	
Operating Engineers (-1.3%)		
Plasterers/Cement Masons (-1.2%)		
Plumbers/Pipefitters/Steamfitters (-0.9%)		
Bricklayers (-0.8%)		
Laborers (-0.7%)		
Electricians (-0.6%)		

**NOTE:** The unit of analysis in this study was the individual, not the organization. For some organizations, there could be (and probably was) more than one respondent in the sample. This should be remembered when interpreting the data.