

California Energy Commission
CONSULTANT REPORT

Construction Labor Trends Market Assessment

Workforce Instruction for Standards and Efficiency
(WISE) Program

Prepared for: **California Energy Commission**
Prepared by: **California Homebuilding Foundation & ConSol**



California Energy Commission
Edmund G. Brown Jr., Governor



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PREFACE

The Workforce Instruction for Standards and Efficiency (WISE) program is designed to provide training on high performance attics and walls in new residential construction in California. As a component of WISE, this Construction Labor Trends Market Assessment will analyze changes in construction industry employment at the national, statewide and metropolitan statistical area (MSA) levels from 2006 through 2015.

By assessing labor trends of the construction workforce, this report will help identify employment deficits and recovery by region to determine how an emerging labor force trained in high performance building practices can be integrated into areas with increasing labor demands.

ABSTRACT

This report analyzes employment statistics to identify annual labor trends for the homebuilding industry nationwide, statewide and in California's largest five metropolitan statistical areas (MSAs) over the past ten years. Data for this research is derived from statistics produced by state and national labor and employment departments. The purpose of this report is to investigate the decline in persons employed within the homebuilding industry beginning in 2006 and continuing through 2015. This document serves as one of the four market assessment reports prepared for a workplace training program involving high performance construction. Findings indicate that the homebuilding workforce has improved in recent years on the regional, statewide and national levels; however, these improvements are still below the employment volume of pre-recession years.

Keywords: Employment, Labor, Homebuilding, Energy Efficiency, High Performance Building, Construction, Title 24.

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EXECUTIVE SUMMARY

Using industry data, this report reveals that California's construction labor market experienced a deeper recession and is recovering at a slower pace than the national market as a whole. When analyzed regionally, specific metropolitan areas are well below their pre-recession highs, and no metro area has fully reached the 2006 peak employment levels. Riverside and Sacramento MSA's experienced an especially large drop in employment during the recession, and have been the slowest to recover. Employment in the San Francisco Bay Area has shown the strongest improvement, especially in Specialty Trade Contracting where employment rates are nearly on-par with pre-recession levels in 2015.

Methodology and Limitations of Labor Data

Construction and Specialty Labor categorizations are defined according to the North American Industry Classification System (NAICS) and obtained from national and California statewide employment statistics databases. Code 2000 classifies total Construction employees and Code 2380 is for Specialty Trade Contractors.

Data was derived from the U.S. Census Bureau of Labor Statistics (BLS) and California Employment Development Department's (EDD) Labor Market Information (LMI) databases using NAICS Codes at the national and statewide, and California MSA levels. BLS and LMI (statewide) online databases are able to refine the construction labor pool by NAICS Code 2380 to provide an analysis of employees in the Specialty Trades subsector of the building industry. Specialty Trade Contractors includes professions relevant to high performance walls and attics including Framing, Finishing, Drywall and Insulation Contracting.

Because published annual data for 2015 is not yet available from either of the labor statistics sources, the most recent data, December 2015, was utilized and identified as a preliminary source of 2015 annual employment information.

Percentages in the analyses of this report are derived from the percentage change formula: $((\text{Value2} - \text{Value1}) / \text{Value1}) \times 100$ calculated by the primary report author.

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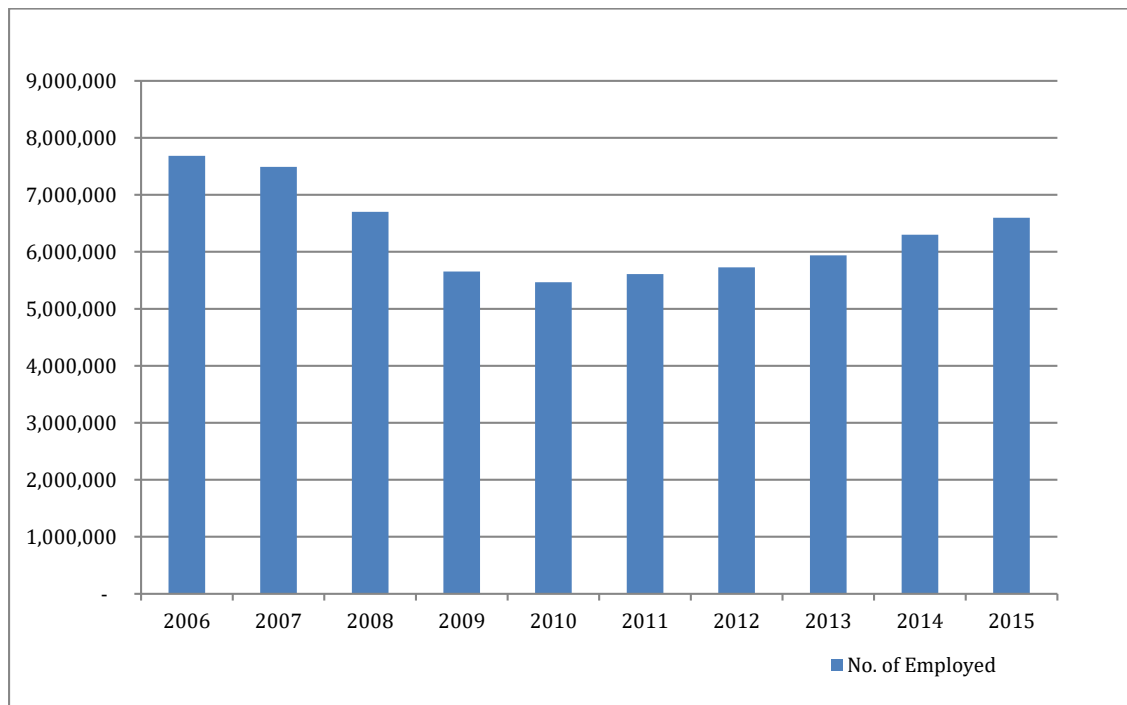
CHAPTER 1: National Labor Trends

1.1 National Construction Industry Trends

The figures below for Construction employment demonstrate a high employment volume in 2006 with a pronounced decrease of 28.9% during the next four years and minor employment increases beginning in 2012 and continuing through 2015.

Approximately 7,685,000 persons were employed in the national Construction Industry in 2006, the highest point of labor volume, which decreased to the lowest point within this 10-year parameter to 5,467,000 employees in 2010. Nationwide construction had 6,597,000 employees as of December 2015—a 20.7% increase from 2010 and a 14.2% decrease compared to 2006.

Figure 1: Construction Employees in the U.S. 2006-2015



Source: Bureau of Labor Statistics

Table 1: Construction Employees in the U.S. 2006-2015

Year	# Employed
2006	7,685,000
2007	7,490,000
2008	6,701,000
2009	5,654,000
2010	5,467,000
2011	5,611,000
2012	5,728,000
2013	5,939,000
2014	6,301,000
2015	6,597,000

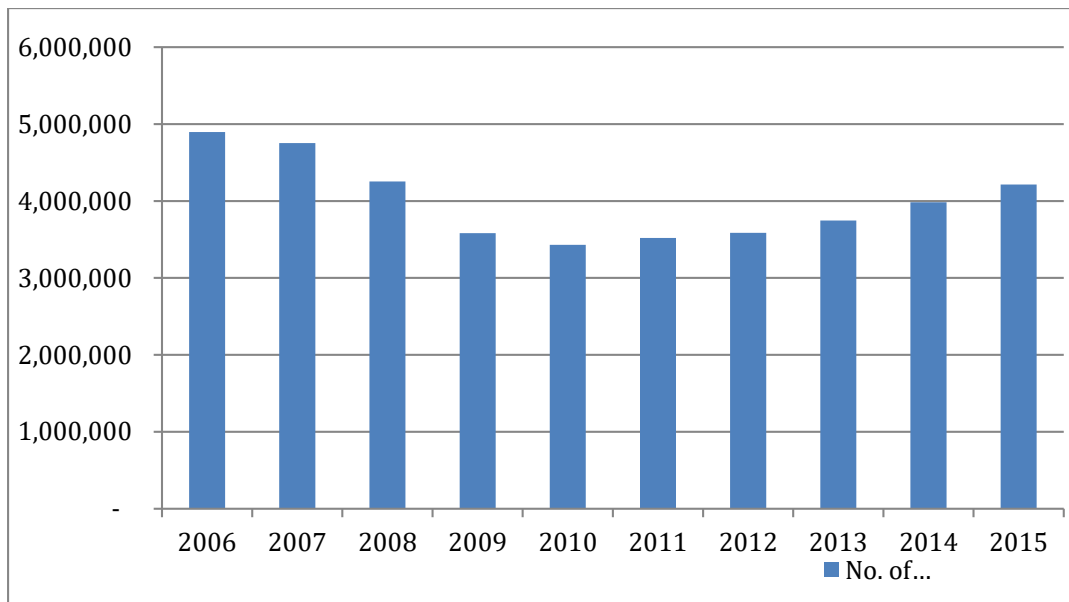
Source: Bureau of Labor Statistics

1.2 National Specialty Trade Contractor Trends

The figures below for national Specialty Trade Contractors demonstrate a high employment volume in 2006 with a pronounced decrease of 29.9% during the next four years and minor employment increases beginning in 2011 and continuing through 2015.

Approximately 4,895,000 persons were employed as Specialty Trade Contractors nationwide in 2006, the highest point of labor volume, which decreased to the lowest point within this 10-year parameter to 3,430,000 employees in 2010. Specialty Trade Contractors held 4,214,000 employees as of December 2015—a 22.86% increase from 2010 and a 13.9% decrease compared to 2006.

Figure 2: Specialty Trade Contractors in the U.S. 2006-2015



Employment, Hours, and Earnings from the Current Employment Statistics survey (National) Credit: *Bureau of Labor Statistics*

Table 2: Specialty Trade Contractors in the U.S. 2006-2015

Year	# Employed
2006	4,895,400
2007	4,753,500
2008	4,253,000
2009	3,581,400
2010	3,430,000
2011	3,520,800
2012	3,586,000
2013	3,745,600
2014	3,984,500
2015	4,214,000

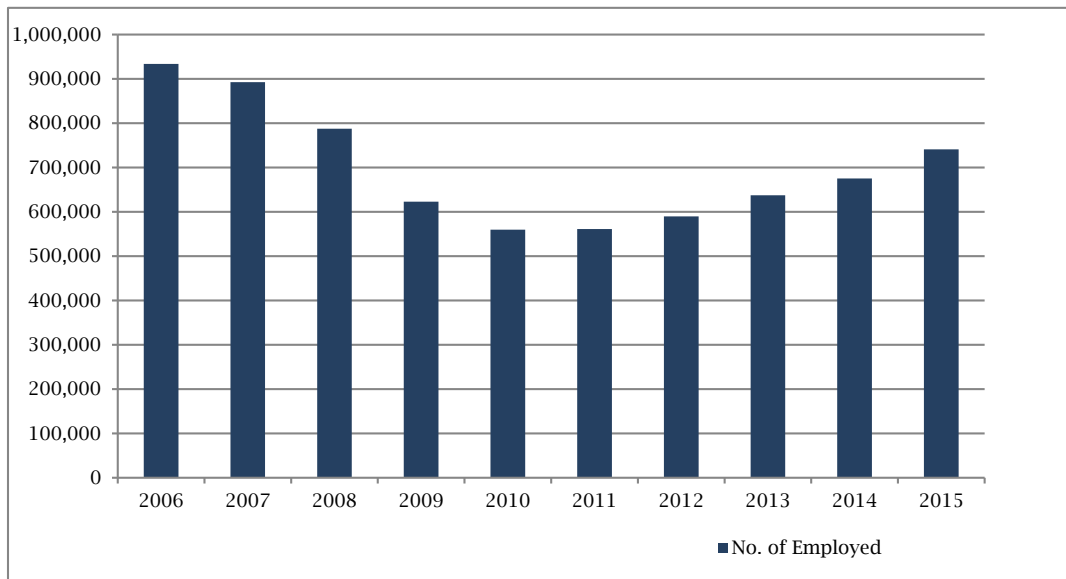
Source: Employment, Hours, and Earnings from the Current Employment Statistics Survey (National), BLS

CHAPTER 2: Statewide Labor Trends

2.1 Statewide Construction Industry Trends

The figures below for Construction employment demonstrate a high employment volume in 2006 with a pronounced decrease of 40% during the next four years and minor employment increases beginning in 2011 and continuing through 2015. Approximately 933,700 persons were employed in California’s construction industry in 2006, the highest point of labor volume, which decreased to the lowest point within this 10-year parameter with 559,800 employees in 2010. Statewide construction held 740,900 employees as of December 2015—a 32.3% increase from 2010 and a 20.6% decrease compared to 2006.

Figure 3: Construction Employees in California 2006-2015



Source: California Employment Development Department Labor Market Information Division

Table 3: Construction Employees in California

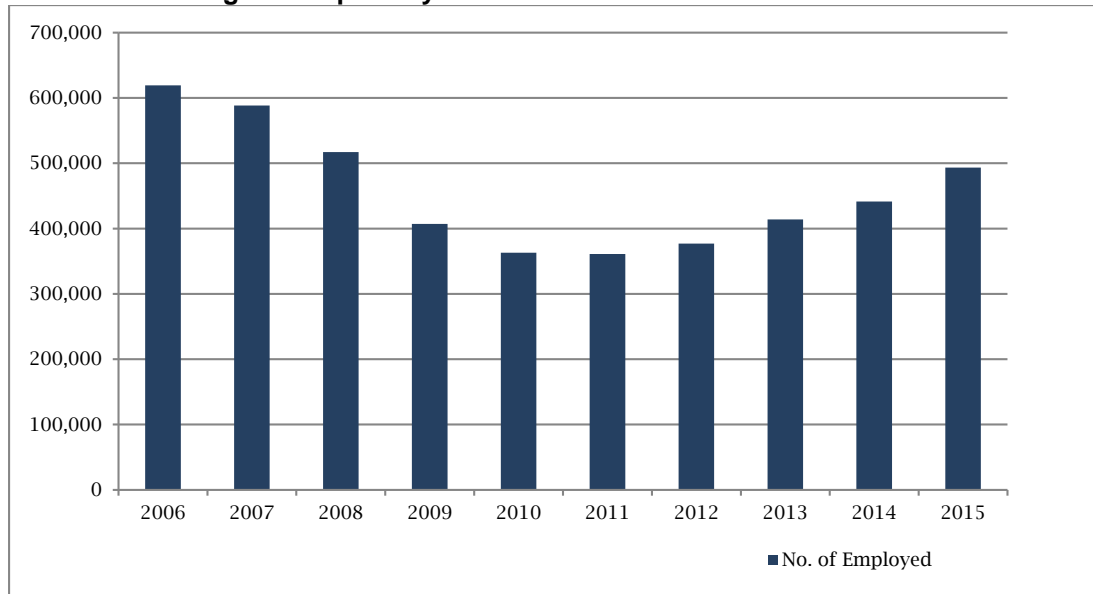
Year	# Employed
2006	933,700
2007	892,600
2008	787,700
2009	623,100
2010	559,800
2011	561,300
2012	589,900
2013	637,300
2014	675,400
2015	740,900

Source: California Employment Development Department Labor Market Information Division

2.2 Statewide Specialty Trade Contractor Trends

The figures below for statewide Specialty Trade Contractors demonstrate high employment volume in 2006 with a pronounced decrease of 41.7% during the next five years and minor employment increases beginning in 2012 and continuing through 2015. Approximately 619,300 persons were employed as Specialty Trade Contractors in 2006, the highest point of labor volume, which decreased to the lowest point within this 10-year parameter to 361,000 employees in 2011. Specialty Trade Contractors held 493,300 employees as of December 2015—a 36.6% increase from 2011 and a 20.3% decrease compared to 2006.

Figure 4: Specialty Trade Contractors in California 2006-2015



Source: California Employment Development Department Labor Market Information Division

Table 4: Specialty Trade Contractors in California 2006-2015

Year	# Employed
2006	619,300
2007	588,500
2008	517,200
2009	407,200
2010	363,000
2011	361,000
2012	377,000
2013	414,000
2014	441,400
2015	493,300

Source: California Employment Development Department Labor Market Information Division

CHAPTER 3: Metropolitan Area (MSA) Labor Trends

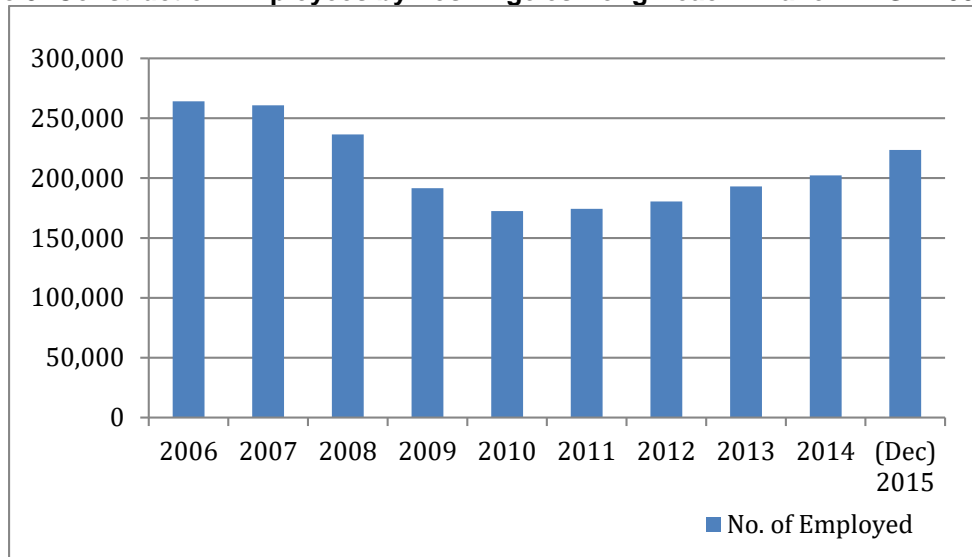
This section evaluates labor trends in the Construction Industry in general and for Specialty Trade Contractors in the five largest metropolitan areas of California.

3.1 Los Angeles-Long Beach-Anaheim MSA

3.1.1 Construction Industry Trends

As shown in Table 5, approximately 264,100 persons were employed in the Los Angeles-Long Beach-Anaheim MSA construction industry in 2006, the highest point of labor volume, which decreased 34.7% to the lowest point within this 10-year parameter to 172,500 employees in 2010. This MSA's construction industry held 223,500 employees as of December 2015—a 29.6% increase from 2010 and a 15.4% decrease compared to 2006.

Figure 5: Construction Employees by Los Angeles-Long Beach-Anaheim MSA 2006-2015



Source: California Employment Development Department Labor Market Information Division

Table 5: Construction Employees by Los Angeles-Long Beach-Anaheim MSA 2006-2015

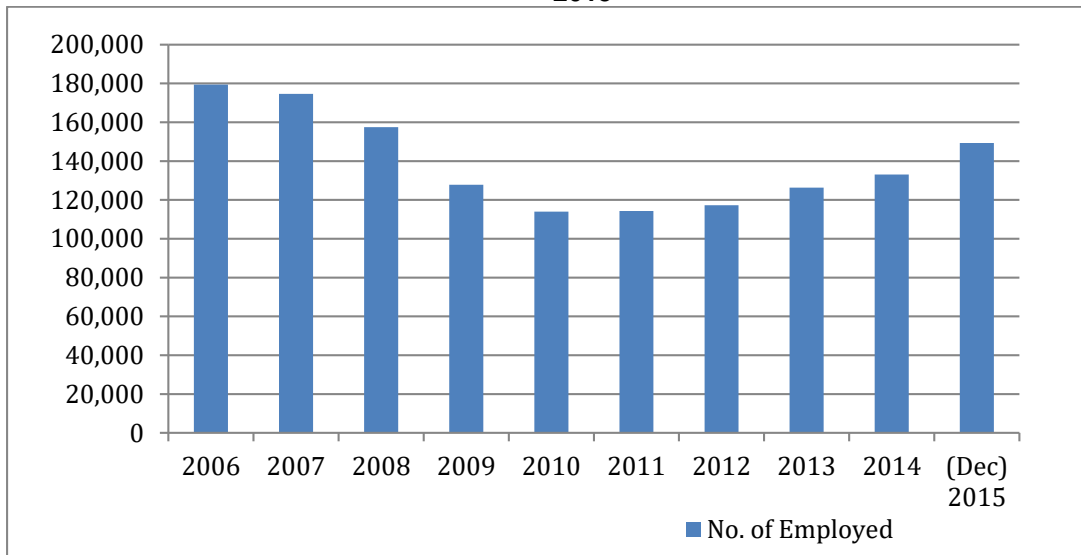
Year	# Employed
2006	264,100
2007	260,700
2008	236,400
2009	191,500
2010	172,500
2011	174,300
2012	180,500
2013	193,000
2014	202,200
2015	223,500

Source: California Employment Development Department Labor Market Information Division

3.1.2 Specialty Trade Contractor Trends

As shown in Table 6, approximately 179,400 persons were employed as Specialty Trade Contractors in the Los Angeles-Long Beach-Anaheim MSA in 2006, the highest point of labor volume, which decreased 36.5% to the lowest point within this 10-year parameter to 114,000 employees in 2010. This MSA’s Specialty Trades held 149,300 employees as of December 2015—a 40% increase from 2010 and a 16.8% decrease compared to 2006.

Figure 6: Specialty Trade Contractors by Los Angeles-Long Beach-Anaheim MSA 2006-2015



Source: California Employment Development Department Labor Market Information Division

Table 6: Specialty Trade Contractors by Los Angeles-Long Beach-Anaheim MSA 2006-2015

Year	# Employed
2006	179,400
2007	174,600
2008	157,500
2009	127,800
2010	114,000
2011	114,300
2012	117,300
2013	126,300
2014	133,100
2015	149,300

Source: California Employment Development Department Labor Market Information Division

3.2 Riverside-San Bernardino-Ontario MSA

3.2.1 Construction Industry Trends

As shown in Table 7, approximately 127,500 persons were employed in the Riverside-San Bernardino-Ontario MSA construction industry in 2006, the highest point of labor volume, which decreased 53.6% to the lowest point within this 10-year parameter to 59,100 employees in 2011. This MSA’s construction industry held 84,800 employees as of December 2015—a 43.5% increase from 2010 and a 33.5% decrease compared to 2006.

Figure 7: Construction Employees by Riverside-San Bernardino-Ontario MSA 2006-2015



Source: California Employment Development Department Labor Market Information Division

Table 7: Construction Employees by Riverside-San Bernardino-Ontario MSA 2006-2015

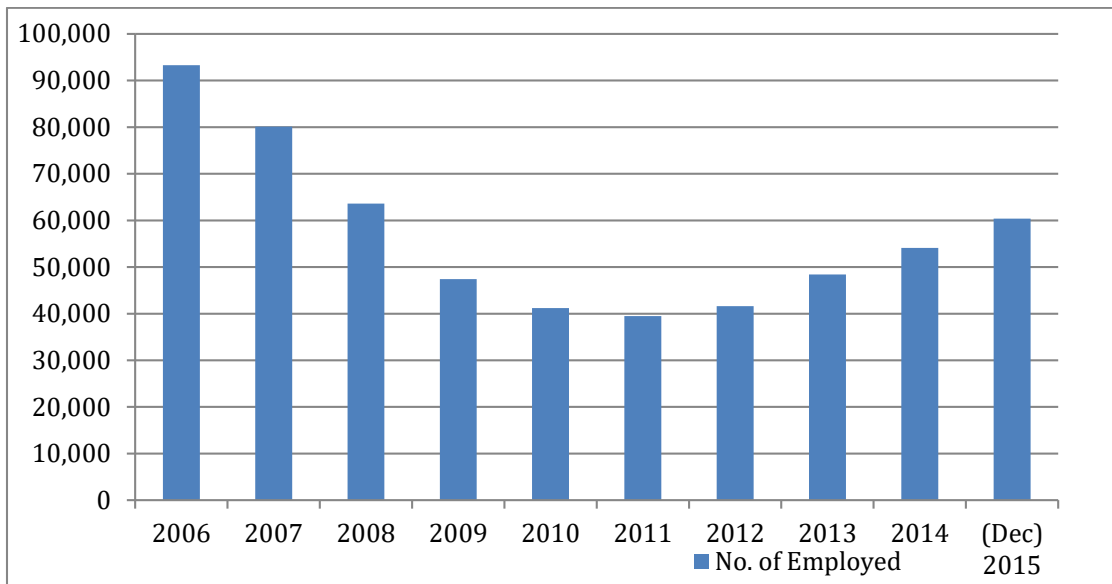
Year	# Employed
2006	127,500
2007	112,500
2008	90,700
2009	68,000
2010	59,700
2011	59,100
2012	62,600
2013	70,000
2014	77,000
2015	84,800

Source: California Employment Development Department Labor Market Information Division

3.2.2 Specialty Trade Contractor Trends

As shown in Table 8, approximately 93,300 persons were employed as Specialty Trade Contractors in the Riverside-San Bernardino-Ontario MSA in 2006, the highest point of labor volume, which decreased 57.6% to the lowest point within this 10-year parameter to 39,500 employees in 2011. This MSA’s Specialty Trades Contractors held 60,400 employees as of December 2015—a 52.9% increase from 2011 and a 35.3% decrease compared to 2006.

Figure 8: Specialty Trade Contractors in Riverside-San Bernardino-Ontario MSA 2006-2015



Source: California Employment Development Department Labor Market Information Division

Table 8: Specialty Trade Contractors by Riverside-San Bernardino-Ontario MSA 2006-2015

Year	# Employed
2006	93,300
2007	80,100
2008	63,600
2009	47,400
2010	41,200
2011	39,500
2012	41,600
2013	48,400
2014	54,100
2015	60,400

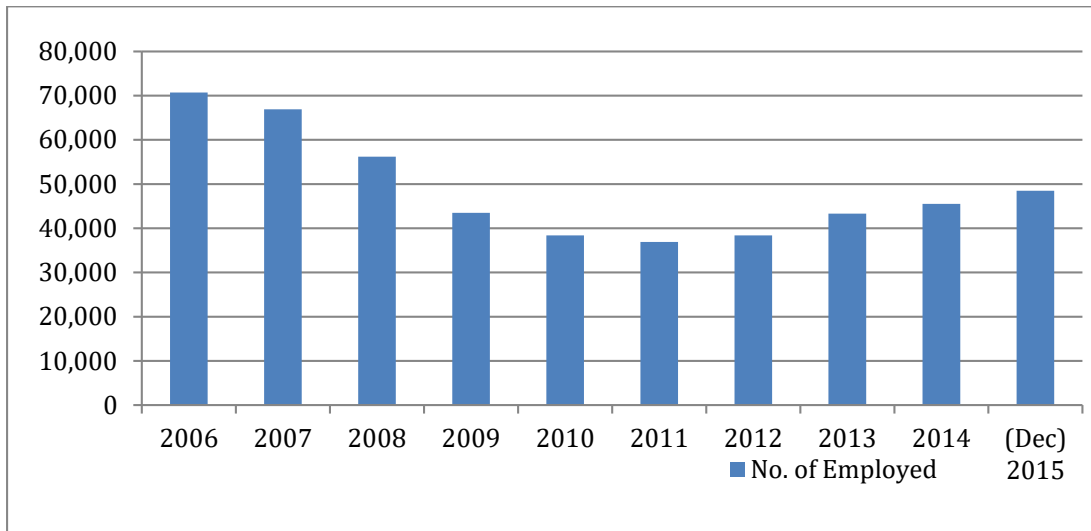
Source: California Employment Development Department Labor Market Information Division

3.3 Sacramento-Roseville-Arden Arcade MSA

3.3.1 Construction Industry Trends

As shown in Table 9, approximately 70,700 persons were employed in the Sacramento-Roseville-Arden Arcade MSA Construction Industry in 2006, the highest point of labor volume, which decreased 47.8% to the lowest point within this 10-year parameter to 36,900 employees in 2011. This MSA’s Construction Industry held 48,500 employees as of December 2015—a 31.4% increase from 2011 and a 31.4% decrease compared to 2006.

Figure 9: Construction Employees by Sacramento-Roseville-Arden Arcade MSA 2006-2015



Source: California Employment Development Department Labor Market Information Division

Table 9: Construction Employees by Sacramento-Roseville-Arden Arcade MSA 2006-2015

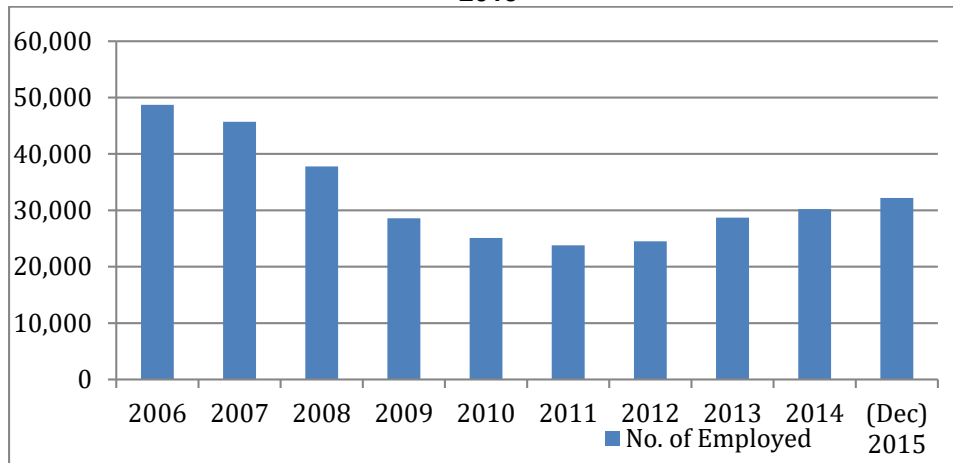
Year	No. of Employed
2006	70,700
2007	66,900
2008	56,200
2009	43,500
2010	38,400
2011	36,900
2012	38,400
2013	43,300
2014	45,500
2015	48,500

Source: California Employment Development Department Labor Market Information Division

3.3.2 Specialty Trade Contractor Trends

As shown in Table 10, approximately 48,700 persons were employed as Specialty Trade Contractors in the Sacramento-Roseville-Arden Arcade MSA in 2006, the highest point of labor volume, which decreased 51.1% to the lowest point within this 10-year parameter to 23,800 employees in 2011. This MSA’s Specialty Trades Contractors held 32,200 employees as of December 2015—a 35.3% increase from 2011 and a 33.9% decrease compared to 2006.

Figure 10: Specialty Trade Contractors by Sacramento-Roseville-Arden Arcade MSA 2006-2015



Source: California Employment Development Department Labor Market Information Division

Table 10: Specialty Trade Contractors by Sacramento-Roseville-Arden Arcade MSA 2006-2015

Year	No. of Employed
2006	48,700
2007	45,700
2008	37,800
2009	28,600
2010	25,100
2011	23,800
2012	24,500
2013	28,700
2014	30,200
2015	32,200

Source: California Employment Development Department Labor Market Information Division

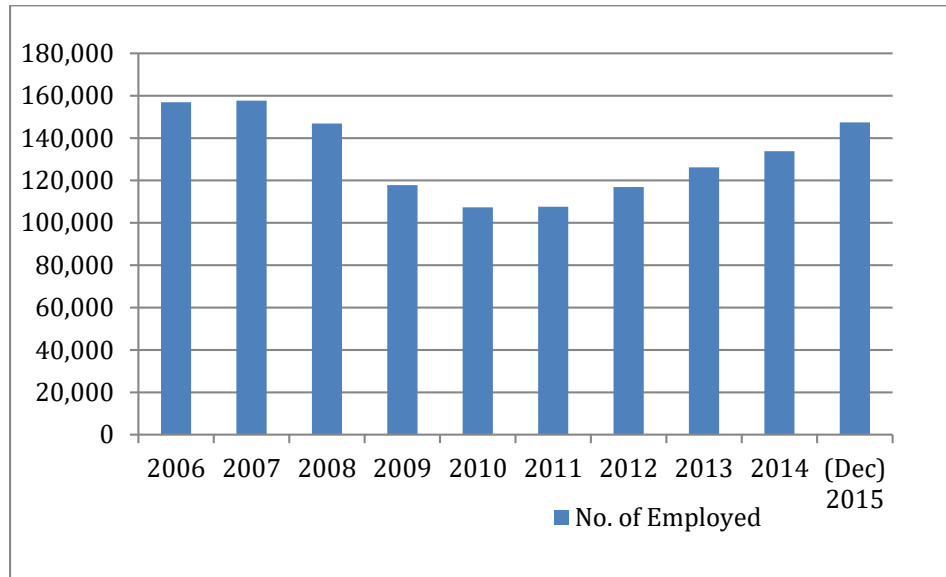
3.4 San Francisco Bay Area

This section combines two neighboring MSA's; San Francisco-Oakland-Hayward and San-Jose-Santa Clara to provide a regional analysis.

3.4.1 Construction Industry Trends

As shown in Table 11, approximately 157,700 persons were employed in the San Francisco-Oakland-San Jose MSA Construction Industry in 2007, the highest point of labor volume, which decreased 32% to the lowest point within this 10-year parameter to 107,300 employees in 2010. This MSA's construction industry held 147,400 employees as of December 2015—a 37.4% increase from 2010 and a 6.5% decrease compared to 2007.

Figure 11: Construction Employees by San Francisco & San Jose MSAs 2006-2015



Source: California Employment Development Department Labor Market Information Division

Table 11: Construction Employees by San Francisco & San Jose MSAs 2006-2015

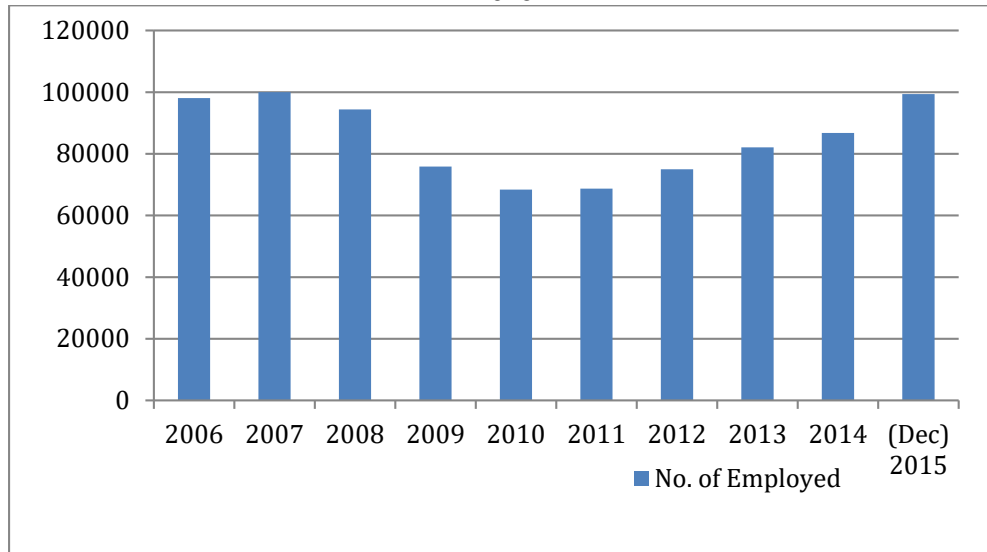
Year	Employed
2006	156,900
2007	157,700
2008	146,900
2009	117,800
2010	107,300
2011	107,600
2012	116,900
2013	126,200
2014	133,800
2015	147,400

Source: California Employment Development Department Labor Market Information Division

3.4.2 Specialty Trade Contractor Trends

As shown in Table 12 approximately 100,000 persons were employed as Specialty Trade Contractors in the San Francisco-Oakland-San Jose MSA in 2007, the highest point of labor volume, which decreased 31.6% to the lowest point within this 10-year parameter to 68,400 employees in 2010. This MSA’s Specialty Trades held 99,400 employees as of December 2015—a 45.3% increase from 2010 and a 0.6% decrease compared to 2007.

Figure 12: Specialty Trade Contractors in San Francisco-Oakland-San Jose MSA 2006-2015



Source: California Employment Development Department Labor Market Information Division

Table 12: Specialty Trade Contractors in San Francisco and San Jose MSAs 2006-2015

Year	Employed
2006	98,100
2007	100,000
2008	94,400
2009	75,900
2010	68,400
2011	68,700
2012	75,000
2013	82,100
2014	86,800
2015	99,400

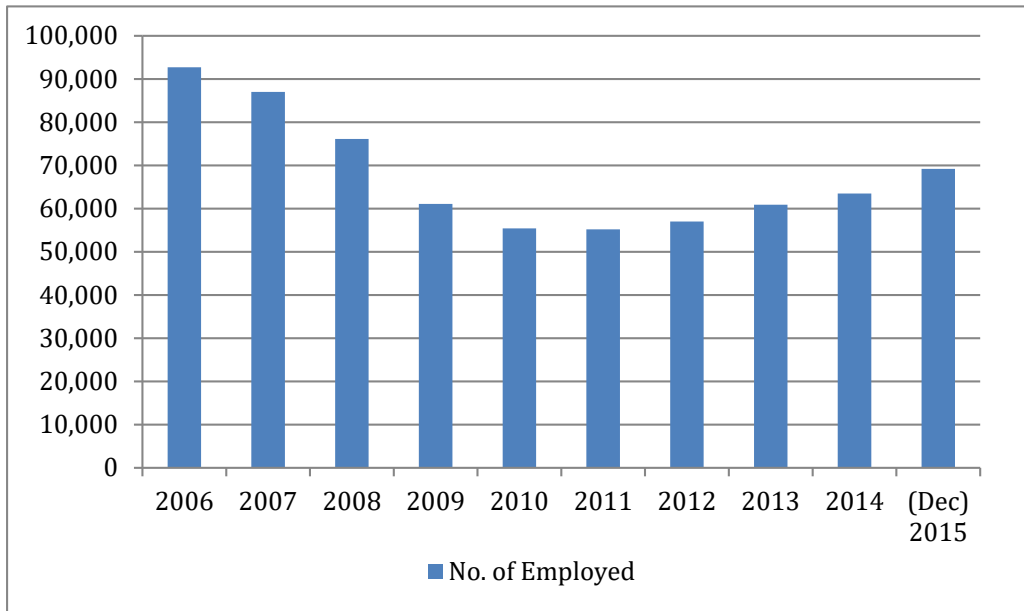
Source: California Employment Development Department Labor Market Information Division

3.5 San Diego-Carlsbad MSA

3.5.1 Construction Industry Trends

As shown in Table 13, approximately 92,700 persons were employed in the San Diego-Carlsbad MSA Construction Industry in 2006, the highest point of labor volume, which decreased 40.5% to the lowest point within this 10-year parameter to 55,200 employees in 2011. This MSA's Construction Industry held 69,200 employees as of December 2015—a 25.4% increase from 2011 and a 25.4% decrease compared to 2006.

Figure 13: Construction Employees by San Diego-Carlsbad MSA 2006-2015



Source: California Employment Development Department Labor Market Information Division

Table 13: Construction Employees by San Diego-Carlsbad MSA 2006-2015

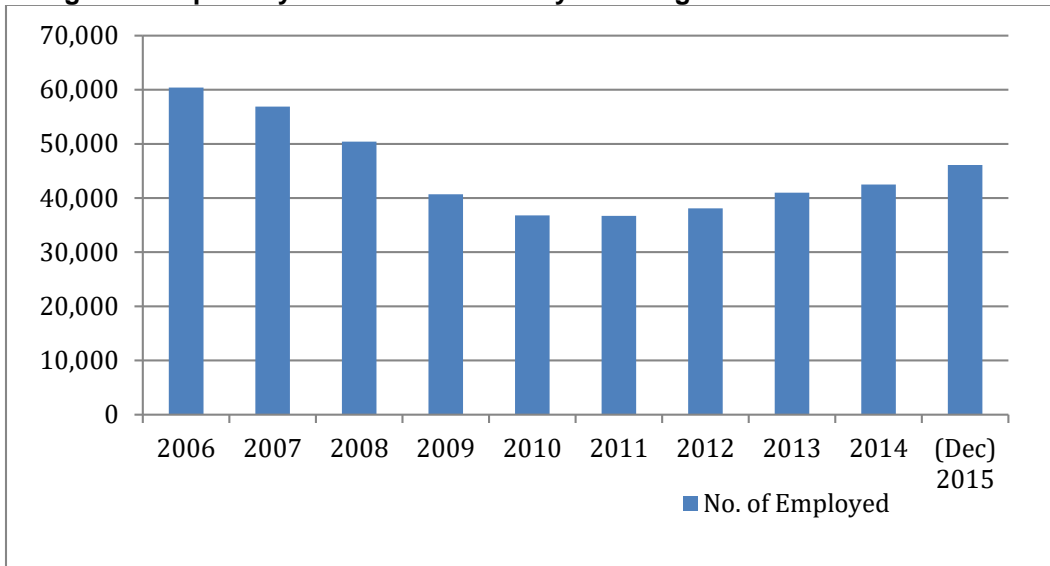
Year	Employed
2006	92,700
2007	87,000
2008	76,100
2009	61,100
2010	55,400
2011	55,200
2012	57,000
2013	60,900
2014	63,500
2015	69,200

Source: California Employment Development Department Labor Market Information Division

3.5.2 Specialty Trade Contractor Trends

As shown in Table 14 approximately 60,400 persons were employed as Specialty Trades Contractors in the San Diego-Carlsbad MSA in 2006, the highest point of labor volume, which decreased 39.2% to the lowest point within this 10-year parameter to 36,700 employees in 2011. This MSA’s Specialty Trade Contractors held 46,100 employees as of December 2015—a 25.6% increase from 2011 and a 23.7% decrease compared to 2006.

Figure 14: Specialty Trade Contractors by San Diego-Carlsbad MSA 2006-2015



Source: California Employment Development Department Labor Market Information Division

Table 14: Specialty Trade Contractors by San Diego-Carlsbad MSA 2006-2015

Year	Employed
2006	60,400
2007	56,900
2008	50,400
2009	40,700
2010	36,800
2011	36,700
2012	38,100
2013	41,000
2014	42,500
(Dec) 2015	46,100

Source: California Employment Development Department Labor Market Information Division

Chapter 4: Conclusion

National and California-wide employment for Construction and Specialty Trade Contractors show similar patterns over the past 10 years, although a closer look reveals that California's construction labor market was harder hit during the recession, and has experienced a slower recovery than the nation as a whole.

California Construction labor declined -40% from its peak in 2006 to the lowest point in 2010, and is still below the peak by 20.6% in 2015. California Specialty Trade Labor declined 41.7% from the peak in 2006 to the lowest point in 2011, and is still below the peak by 20.3% in 2015.

In comparison National Construction labor declined 27% from its peak in 2006 to the lowest point in 2010, and is still below the peak by 14.2%. National Specialty Trade Contractor labor declined 29.9% from its peak in 2006 to the lowest point in 2010, and is still below the peak by 13.9%.

Two MSA's stand out in California as having highly depressed labor markets with limited recovery since the recession; Sacramento and Riverside. Riverside is the worst performing with Construction and Specialty Trade Contractor employment in 2015 down 33.5% and 35.3% since the 2006 peak. Sacramento follows closely behind with Construction and Specialty Trade Contractor employment in 2015 down 31.4% and 33.9% since the 2006 peak.

The strongest performing MSA is the San Francisco Bay Area where Construction is down 6.5% from the 2006 peak in 2015, and Specialty Trades Contractors is down less than 1% from the 2006 peak in 2015.

In general, the findings in this report reveal the lowest points employment levels for Construction and Specialty Trades occurred between 2010 and 2011 with gradual annual improvements leading up to the close of 2015. The volume of persons employed in the Construction and Specialty Trades was highest in 2006 and has not yet risen to pre-recession levels in any of the analyzed MSAs. For both Construction and Specialty Trades, the order of recovery among MSA's from best to worst is: 1) San Francisco Bay Area, 2) Los Angeles-Long Beach-Anaheim, 3) San Diego-Carlsbad, 4) Sacramento-Arden—Arcade, Roseville and 5) Riverside-San Bernardino-Ontario.

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