



INSIDE CONSTRUCTION TRENDS

Introduction

Background

Since 1972, NECA has published and distributed the *Inside Construction Survey* in an effort to show the trends, not the exact numbers, in the electrical construction industry segment. The basic challenge in reporting and comparing data is three-fold: One, make sure to compare “apples to apples” as much as possible; two, be consistent in reporting; and three, be able to defend the data.

This report is the result of an extensive study by NECA and the IBEW into valid data sources. All this research confirmed that the sources which have been used since 1972 in producing this report are still the most reliable. This report, and subsequent issues, have been reviewed and evaluated by Carey L. Peters, the Executive Director of the Construction Labor Research Council (CLRC), a nationally recognized and respected construction industry analyst.

Factoring

In the national report, factoring has been applied to both Bureau of Labor Statistics (BLS) and Bureau of the Census (BOC) data to produce “inside electrical employees (productive)” and “inside electrical wages (productive).” This breakdown allows us to focus on the “productive” aspect of the industry. Without this correction factor, the numbers of employees of signatory employers and wages are understated as a percentage of the total market because IBEW electricians and apprentices are compared against not just the total of electricians and apprentices, but to a total that includes secretaries, estimators, principals as well as other “non-productive” workers.

Productive Employees

The portion of employees attributed as “productive” in the 2007 Construction Census was determined to be 70% and is applied to the BLS figures beginning in 2008.

Productive Wages

The portion of industry wages attributed to “productive” employees in the 2007 Construction Census was determined to be 64% and is applied to the BLS figures beginning in 2008. These margins will be applied to the subsequent years until the next construction census can be re-evaluated.

NECA Membership

“NECA Membership” reflects the number of NECA members in good standing at the end of each year.

Value of Contracts

This data is from the Dodge Construction Potentials Bulletin (series). It shows the value of construction contracts for a state as reported by Dodge. It is included here as another frame of reference that may show a relationship to the other data.

Labor Hours

An additional report has been added which reflects the “Total Labor Hours Reported by NEBF”.

The information contained in this report is the data reported to the NEBF by its covered employers, as reflected on their monthly payroll reports, and as published annually by the executive secretary/treasurer of NEBF to all local board secretary/treasurers. There has been no factoring for productive employees because there is no analysis done to government data.

Unionization

The figures and percentages presented in this report do not reflect the potential workforce in NAICS 238210 which may be organized by the IBEW. This data only reflects employees reported under NAICS 238210, not employees from outside NAICS 238210 who could be reported if they were unionized by the IBEW organizing programs. Also, the IBEW “Unionization rate” compares BLS data to the IBEW “August Construction Employment Survey,” not the year end NEBF data. Therefore, the percent of signatory employees in this report may differ slightly from the unionized percentage desired by an organizer.

Summary

Again, we emphasize that these numbers are offered not as a definitive market share analysis, but merely as an illustration of the trends in a state market. By using a consistent methodology and reliable data sources, we can track union/non-union employer market share trends over time with a high degree of confidence. Caution should be used when drawing conclusions using this state data and applying it to local conditions. Local parties should conduct their own market analyses to determine and track the market in their areas.