

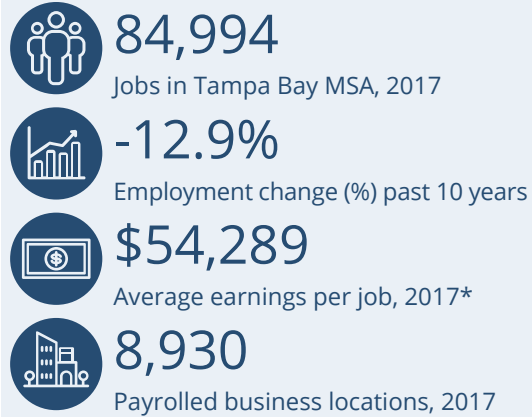
# CONSTRUCTION

The Construction sector was one of the hardest-hit during the recession. Nationally, employment have still not reached pre-recession levels and are not projected to do so in the years ahead. Declines were steeper in the Tampa Bay MSA than at the national level, with the four-county region shedding more than 12,500 jobs between 2007 and 2017 (nearly 13 percent of total employment in the sector).

Employment in one subsector—Heavy and Civil Engineering Construction (NAICS 237)—has remained stable during the downturn, with the subsector actually adding slightly more than 300 jobs over the decade. The most significant losses were seen among Specialty Trade Contractors (NAICS 238). This subsector (which includes electrical, plumbing, and HVAC contractors), accounted for more than four out of five jobs lost in the Construction sector (84 percent) during the period.

**FIGURE 1. OVERVIEW: CONSTRUCTION**

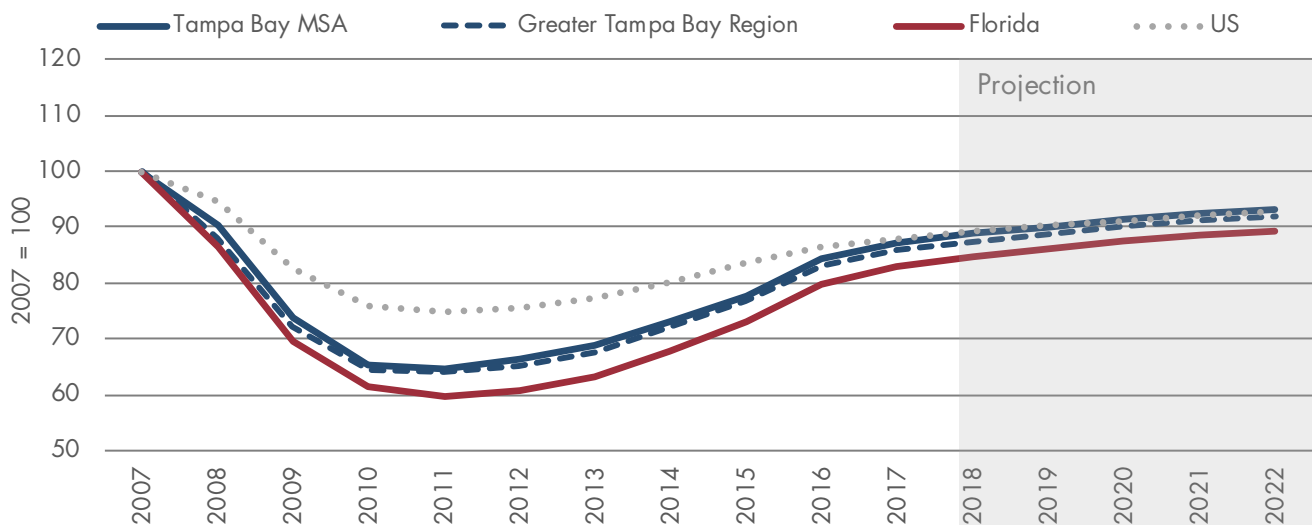
**DEFINITION:** The Construction sector comprises establishments primarily engaged in the construction of buildings (residential and non-residential) or engineering projects (such as highways and utility systems).



**CLASSIFICATION USED FOR ANALYSIS:**  
NAICS 23 Construction

**FIGURE 2. EMPLOYMENT TRENDS (HISTORIC & PROJECTED): CONSTRUCTION**

JOB CHANGE RELATIVE TO 2007, WITH COMPARISONS TO TOTAL EMPLOYMENT AND STATE, US TRENDS



Source(s): All figures, Emsi 2018.2 - QCEW Employees, Non-QCEW Employees, and Self-Employed

Note(s): \*Average earnings per job is the total industry earnings for a region divided by number of jobs. It includes wages, salaries, supplements (additional employee benefits), and proprietor income. It is not equivalent to compensation paid directly to workers.

**MAJOR EMPLOYERS.** Ripa & Associates is the MSA's largest general contracting firm in terms of local revenues, estimated at \$245 million in 2017. The firm also employs the largest number of workers locally (750). Brightview Landscaping is the second largest contracting/construction employer with 440 jobs. Of the top 20 firms profiled, 8 are headquartered out-of-state and all but 1 are multi-billion-dollar operations. ARCO Murray Construction Co was the only firm on the list with total revenues in excess of \$1 billion headquartered in the MSA, however, local revenues suggest that a large share of the firm's work is conducted outside the region.



**FIGURE 3. LARGEST GENERAL CONTRACTORS/CONSTRUCTION FIRMS IN TAMPA BAY MSA RANKED BY LOCAL REVENUE, 2017**

BUSINESS NAME	CITY	LOCAL REVENUE 2017	TOTAL COMPANY REVENUE 2017	LOCAL EMPLOYEES	HEADQUARTERS LOCATION
Ripa & Associates	Tampa	\$245.00 M	\$245.00 M	750	Tampa, FL
KAST Construction	Tampa	\$186.14 M	\$510.62 M	80	West Palm Beach, FL
Hawkins Construction Inc.	Tarpon Springs	\$156.50 M	\$156.50 M	80	Tarpon Springs, FL
Creative Contractors Inc.	Clearwater	\$146.00 M	\$146.00 M	83	Clearwater, FL
Skanska USA	Tampa	\$143.79 M	\$7.25 B	152	New York, NY
Ryan Companies US Inc.	Tampa	\$118.88 M	\$1.70 B	44	Minneapolis, MN
DPR Construction	Tampa	\$75.21 M	\$4.60 B	120	Redwood City, CA
ARCO Murray Construction Co.	Tampa	\$74.80 M	\$1.50 B	20	Tampa, FL
iConstructors LLC	Tampa	\$70.00 M	\$70.00 M	—	Tampa, FL
Bay to Bay Properties LLC	Safety Harbor	\$58.95 M	\$58.95 M	49	Safety Harbor, FL
Bandes Construction Co. Inc.	Dunedin	\$55.00 M	\$60.00 M	28	Dunedin, FL
Gilbane Building Company	Tampa	\$51.76 M	\$4.90 B	111	Providence, RI
JE Dunn Construction Company Inc.	Tampa	\$48.74 M	\$2.96 B	22	Kansas City, MO
Suffolk	Tampa	\$48.00 M	\$3.03 B	45	Boston, MA
Ed Taylor Construction Inc.	Tampa	\$44.40 M	\$44.41 M	47	Tampa, FL
Wehr Constructors Inc.	Tampa	\$41.00 M	\$125.00 M	28	Louisville, Ky
Wichman Construction	Tampa	\$41.00 M	\$41.00 M	25	Tampa, FL
Hennessy Construction Services Corp.	St. Petersburg	\$40.55 M	\$40.55 M	27	St. Petersburg, FL
Precise Construction	Tampa	\$37.00 M	\$49.00 M	28	Tampa, FL
BrightView Landscape Services	Tampa	\$34.00 M	\$2.30 B	440	Calabasas, CA

Source: Excerpted from "Largest General Contractors/Construction Firms in Tampa Bay," *Tampa Bay Business Journal*, May 4, 2018. (Only 20 largest companies in Hernando, Hillsborough, Pasco, and Pinellas counties in terms of local revenue in 2017 are shown.) Note(s): Data provided by company representatives.

**STAFFING AND HIGH-DEMAND OCCUPATIONS.** Figure 4 (below) shows which occupations hold the highest share of employment in the Construction industry overall and by subsector. Figure 5 (next page) shows demand factors for the 45 occupations with the highest share of industry employment.

**FIGURE 4. TOP 30 OCCUPATIONS: CONSTRUCTION SECTOR (NAICS 23) & SELECTED SUBSECTORS/INDUSTRIES**

PERCENT OF TOTAL JOBS IN INDUSTRY

			Less than 1.0%	1.0% to 2.49%	2.5% to 4.9%	5.0% to 7.49%	Greater than 7.5%
HDOs	SOC CODE	DESCRIPTION	Construction	Residential Bldg. Construction	Nonresidential Bldg. Constr.	Heavy and Civil Engr. Constr.	Specialty Trade Contractors
			23	2361	2362	237	238
	47-2061	Construction Laborers	11.8%	17.2%	14.8%	20.4%	9.2%
	47-2031	Carpenters	8.4%	22.9%	13.9%	3.0%	6.3%
	47-1011	First-Line Supvrs., Constr. Trades & Extraction	7.0%	10.0%	13.8%	9.0%	5.5%
	47-2111	Electricians	5.4%	1.1%	1.4%	0.7%	7.4%
▶	49-9021	HVAC/Refrig. Mechanics & Installers	5.0%	0.6%	0.3%	0.1%	7.0%
	47-2152	Plumbers, Pipefitters, & Steamfitters	4.7%	1.1%	2.1%	1.6%	6.1%
	47-2141	Painters, Construction & Maintenance	4.0%	4.1%	1.5%	0.6%	4.8%
	47-2181	Roofers	3.7%	0.8%	0.4%	0.0%	5.2%
▶	11-9021	Construction Managers	3.3%	5.9%	7.9%	3.5%	2.4%
▶	43-9061	Office Clerks, General	2.6%	3.3%	2.3%	2.2%	2.6%
▶	43-6014	Secretaries/Admin. Asst., Exc. Legal, Med., & Exec.	2.5%	3.3%	3.0%	2.2%	2.3%
	47-2073	Operating Eng. & Other Constr. Equip. Operators	2.4%	0.5%	1.8%	9.6%	1.6%
	13-1051	Cost Estimators	1.8%	1.9%	3.2%	1.4%	1.8%
	47-2051	Cement Masons & Concrete Finishers	1.8%	0.8%	1.7%	1.6%	2.0%
▶	43-3031	Bookkeeping, Accounting, & Auditing Clerks	1.5%	2.1%	1.8%	1.3%	1.4%
	41-3099	Sales Reps., Services, All Other	1.3%	2.1%	0.7%	0.5%	1.3%
	47-3013	Helpers--Electricians	1.3%	0.1%	0.3%	0.1%	1.8%
▶	53-3032	Heavy & Tractor-Trailer Truck Drivers	1.3%	0.3%	0.6%	4.3%	1.0%
▶	11-1021	General & Operations Managers	1.3%	1.3%	1.9%	1.4%	1.2%
	11-9199	Managers, All Other	1.2%	2.1%	0.7%	0.2%	1.2%
	47-2081	Drywall & Ceiling Tile Installers	1.2%	0.9%	0.8%	0.0%	1.4%
	47-2021	Brickmasons & Blockmasons	1.1%	0.5%	0.4%	0.1%	1.5%
	47-2044	Tile & Marble Setters	1.1%	0.8%	0.3%	0.0%	1.5%
	47-4099	Construction & Related Workers, All Other	1.0%	0.6%	0.9%	0.9%	1.0%
	47-2221	Structural Iron & Steel Workers	0.9%	0.2%	2.0%	0.5%	0.9%
	47-2211	Sheet Metal Workers	0.7%	0.1%	0.2%	0.0%	1.0%
	47-2121	Glaziers	0.6%	0.1%	0.0%	0.0%	0.9%
	51-4121	Welders, Cutters, Solderers, & Brazers	0.6%	0.1%	1.0%	1.5%	0.5%
	49-9052	Telecomm. Line Installers & Repairers	0.6%	0.0%	0.0%	1.8%	0.5%
	47-3015	Helpers--Pipelayers, Plumbers, Pipe/Steamfitters	0.6%	0.0%	0.3%	0.3%	0.7%

Source: Emsi 2018.2 – QCEW Employees, Non-QCEW Employees, and Self-Employed. High-demand occupations (HDOs) are those occupations that are expected to experience high pressure in three or more demand factors: new job growth, replacement demand, retirement exposure, or relative wages.

**FIGURE 5. DEMAND FACTORS FOR THE TOP 45 OCCUPATIONS: CONSTRUCTION**

SOC CODE	DESCRIPTION	2017 Jobs	Projected Openings (2017-22)	Net Job Change (2017-2022)	Wage Premium (US=1.00)	% 55-64 Years	% 65+ Years
<b>LOW-SKILL (High school or less)</b>							
43-4051	Customer Service Representatives	48,113	35,613	4,046	0.69	14%	4%
43-9061	Office Clerks, General	26,767	16,841	1,000	0.88	20% ◀	9%
43-6014	Secretaries/Admin. Asst., Exc. Legal, Med., & Exec.	26,624	15,195	815	0.75	25% ◀	10% ◀
47-2061	Construction Laborers	11,090	6,577	773	0.68	14%	3%
47-3013	Helpers--Electricians	1,321	1,068	109	0.82	9%	3%
47-3015	Helpers--Pipelayers, Plumbers, Pipe/Steamfitters	476	411	58	0.94	9%	3%
47-2151	Pipelayers	589	359	44	0.91	16%	3%
47-3012	Helpers--Carpenters	257	203	17	0.94	11%	Insf. Data
<b>MIDDLE-SKILL (More than high school, less than four years)</b>							
43-3031	Bookkeeping, Accounting, & Auditing Clerks	16,886	9,451	-110	1.37	25% ◀	11% ◀
43-1011	First-Line Supvrs., Office & Admin. Support	16,527	9,410	1,127	1.89	21% ◀	5%
53-3032	Heavy & Tractor-Trailer Truck Drivers	13,361	8,304	1,020	1.58	22% ◀	7%
41-3099	Sales Reps., Services, All Other	11,958	7,934	671	0.81	17%	5%
49-9071	Maintenance & Repair Workers, General	13,306	7,449	861	0.70	25% ◀	7%
41-4012	Sales Reps., Whls. & Mfg., Exc. Tech. & Scientific	13,697	7,212	186	1.83	22% ◀	7%
47-1011	First-Line Supvrs., Constr. Trades & Extraction	7,190	3,905	326	0.84	23% ◀	6%
47-2111	Electricians	5,611	3,766	528	0.99	17%	3%
47-2031	Carpenters	7,328	3,751	288	0.95	18%	4%
49-9021	HVAC/Refrig. Mechanics & Installers	6,294	3,683	553	1.11	16%	3%
47-2152	Plumbers, Pipefitters, & Steamfitters	4,259	2,774	448	1.07	16%	3%
41-9022	Real Estate Sales Agents	4,890	2,382	115	0.35	24% ◀	16% ◀
49-1011	First-Line Supvrs., Mechanics, Install, & Repair	4,037	1,914	180	1.72	25% ◀	5%
47-2073	Operating Eng. & Other Constr. Equip. Operators	3,049	1,872	172	0.94	22% ◀	5%
47-2181	Roofers	2,778	1,786	344	0.63	13%	3%
47-2141	Painters, Construction & Maintenance	3,547	1,785	209	0.58	18%	4%
51-4121	Welders, Cutters, Solderers, & Brazers	2,443	1,439	120	0.97	18%	3%
47-2051	Cement Masons & Concrete Finishers	1,673	1,001	80	0.99	15%	3%
47-4099	Construction & Related Workers, All Other	1,309	735	42	0.70	15%	3%
47-2211	Sheet Metal Workers	966	639	108	0.68	17%	4%
49-9052	Telecomm. Line Installers & Repairers	1,290	635	-77	1.05	14%	2%
47-2044	Tile & Marble Setters	929	463	50	0.75	11%	2%
47-2221	Structural Iron & Steel Workers	776	445	29	1.29	16%	2%
47-2081	Drywall & Ceiling Tile Installers	917	390	-41	0.61	12%	2%

Continued next page

Note(s): Highlights: Wage premium = 10 percent or higher than US wages; 55-64 = 20 percent or higher; 65+ = 10 percent or higher.

**FIGURE 5. DEMAND FACTORS FOR THE TOP 45 OCCUPATIONS: CONSTRUCTION (CONTINUED)**

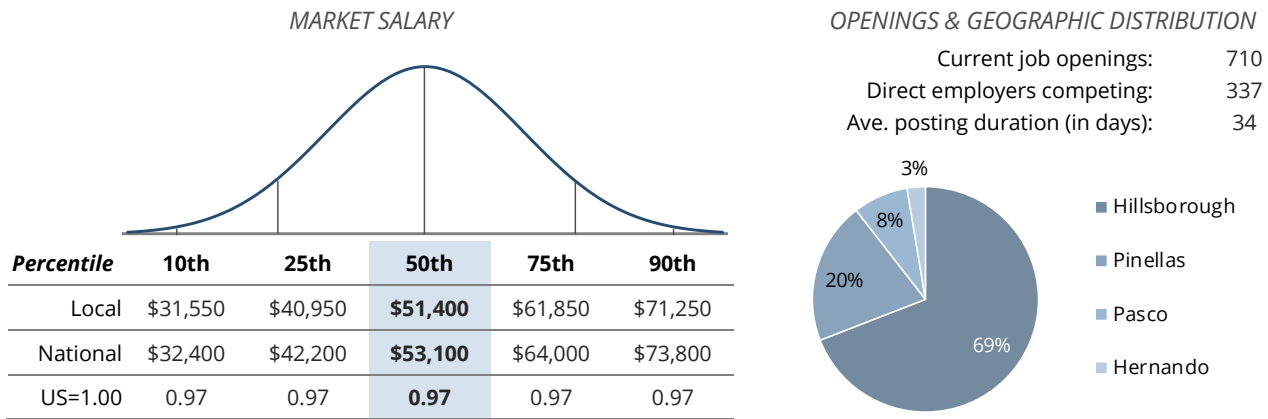
SOC CODE	DESCRIPTION	2017 Jobs	Projected Openings (2017-22)	Net Job Change (2017-2022)	Wage Premium (US=1.00)	% 55-64 Years	% 65+ Years
47-2121	Glaziers	589	381	35	1.03	14%	5%
49-9051	Electrical Power-Line Installers & Repairers	767	357	49	1.25	16%	1%
47-2071	Paving, Surfacing, & Tamping Equip. Operators	501	294	31	0.65	15%	3%
47-2021	Brickmasons & Blockmasons	633	286	-16	0.85	16%	4%
47-2161	Plasterers & Stucco Masons	336	152	-14	0.78	13%	Insf. Data
47-5021	Earth Drillers, Except Oil & Gas	244	152	19	0.63	12%	5%
<b>HIGH SKILL</b> ( <i>Four-year degree or above</i> )							
13-2011	Accountants & Auditors	14,115	7,887	1,441	1.30	19%	6%
13-1199	Business Operations Specialists, All Other	13,245	6,738	687	0.95	21% ◀	5%
11-1021	General & Operations Managers	12,980	6,635	1,208	4.73	20%	4%
11-9199	Managers, All Other	5,514	2,458	478	0.67	24% ◀	8%
13-1051	Cost Estimators	2,282	1,290	152	0.91	27% ◀	13% ◀
11-9021	Construction Managers	3,331	1,250	43	1.55	24% ◀	7%
17-2051	Civil Engineers	2,931	1,200	123	0.66	21% ◀	8%

Source: Emsi 2018.2—QCEW Employees, Non-QCEW Employees, and Self-Employed.

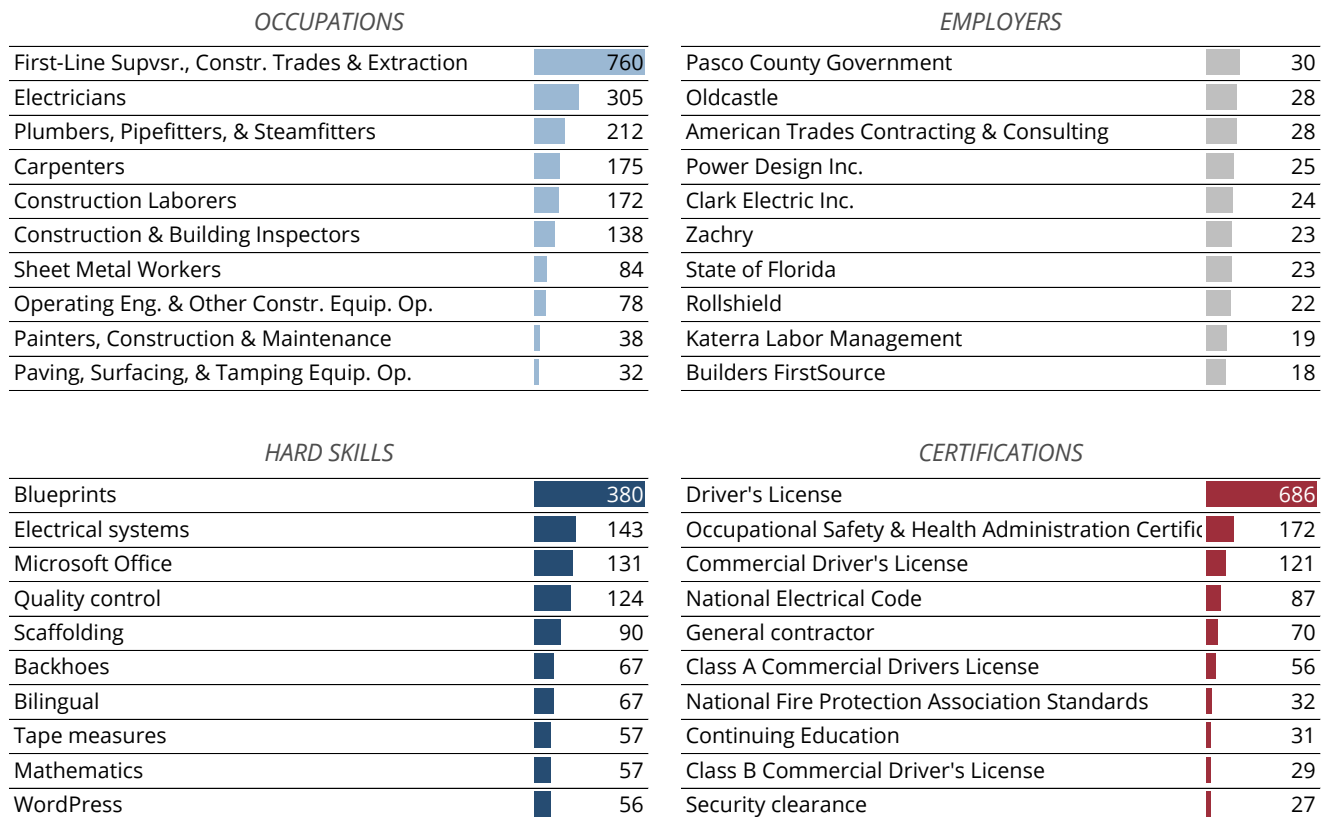
Note(s): Highlights: Wage premium = 10 percent or higher than US wages; 55-64 = 20 percent or higher; 65+ = 10 percent or higher.

**HIRING.** The following figures use real-time labor market information (LMI) to illustrate the hiring environment in the Tampa Bay MSA for selected occupational groups relevant to the Construction sector.

**FIGURE 6. REAL-TIME LMI OVERVIEW: CONSTRUCTION & EXTRACTION OCCUPATIONS (SOC 47-0000) JOB POSTINGS IN ALL INDUSTRIES, TAMPA BAY MSA (JAN 1, 2018–JUN 30, 2018)**



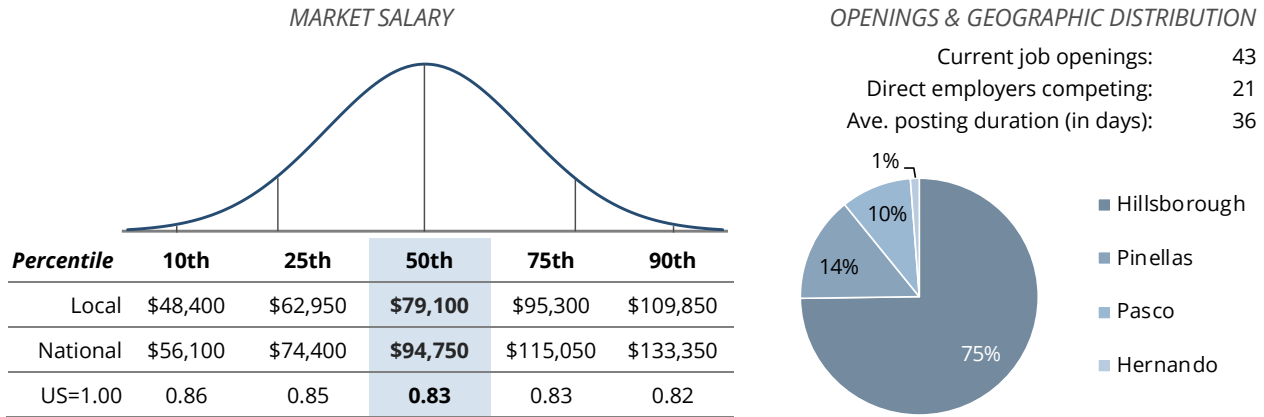
TOP 10 COUNTS (number of postings out of ~2,200 total from Jan 1, 2018–Jun 30, 2018)



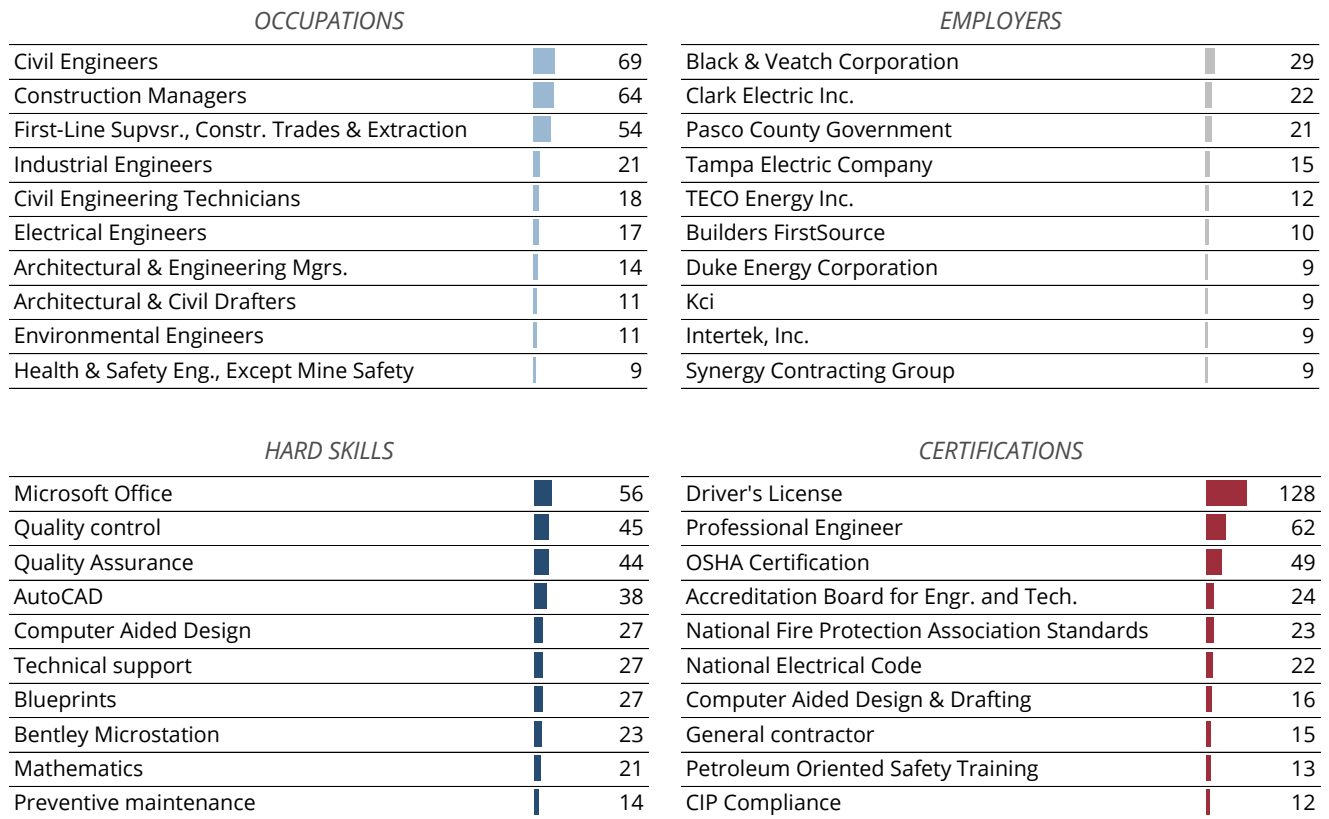
Source: Gartner Talent Neuron (formerly Wanted Analytics)

Note(s): Demand for some occupations (e.g., production or skilled trades workers) and industries (e.g., manufacturing and construction), may be under-stated in job postings data as these positions are somewhat less likely to be filled using on-line job postings.

**FIGURE 7. REAL-TIME LMI OVERVIEW: PRE-CONSTRUCTION & DESIGN (KEYWORD SEARCH)**  
 JOB POSTINGS IN **CONSTRUCTION INDUSTRIES**, TAMPA BAY MSA (JAN 1, 2018–JUN 30, 2018)



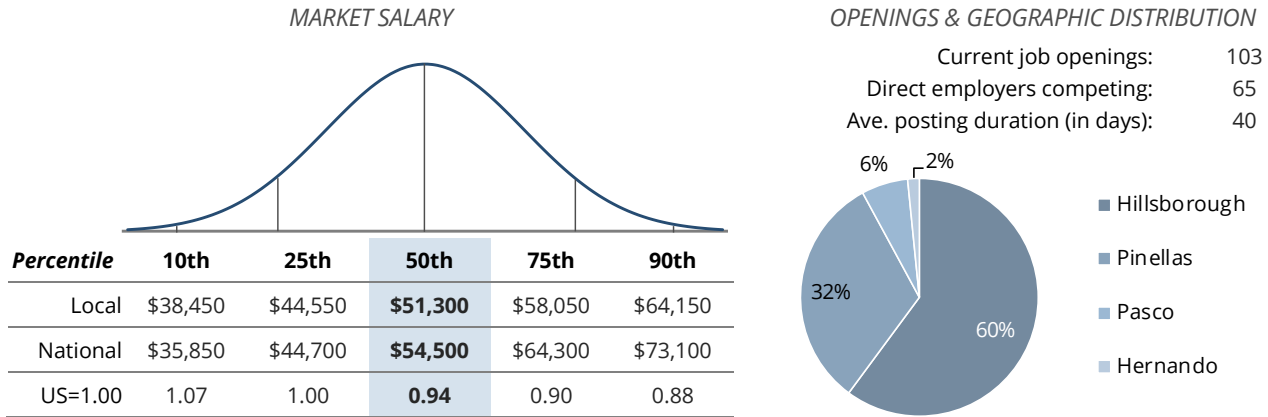
TOP 10 COUNTS (number of postings out of ~340 total from Jan 1, 2018–Jun 30, 2018)



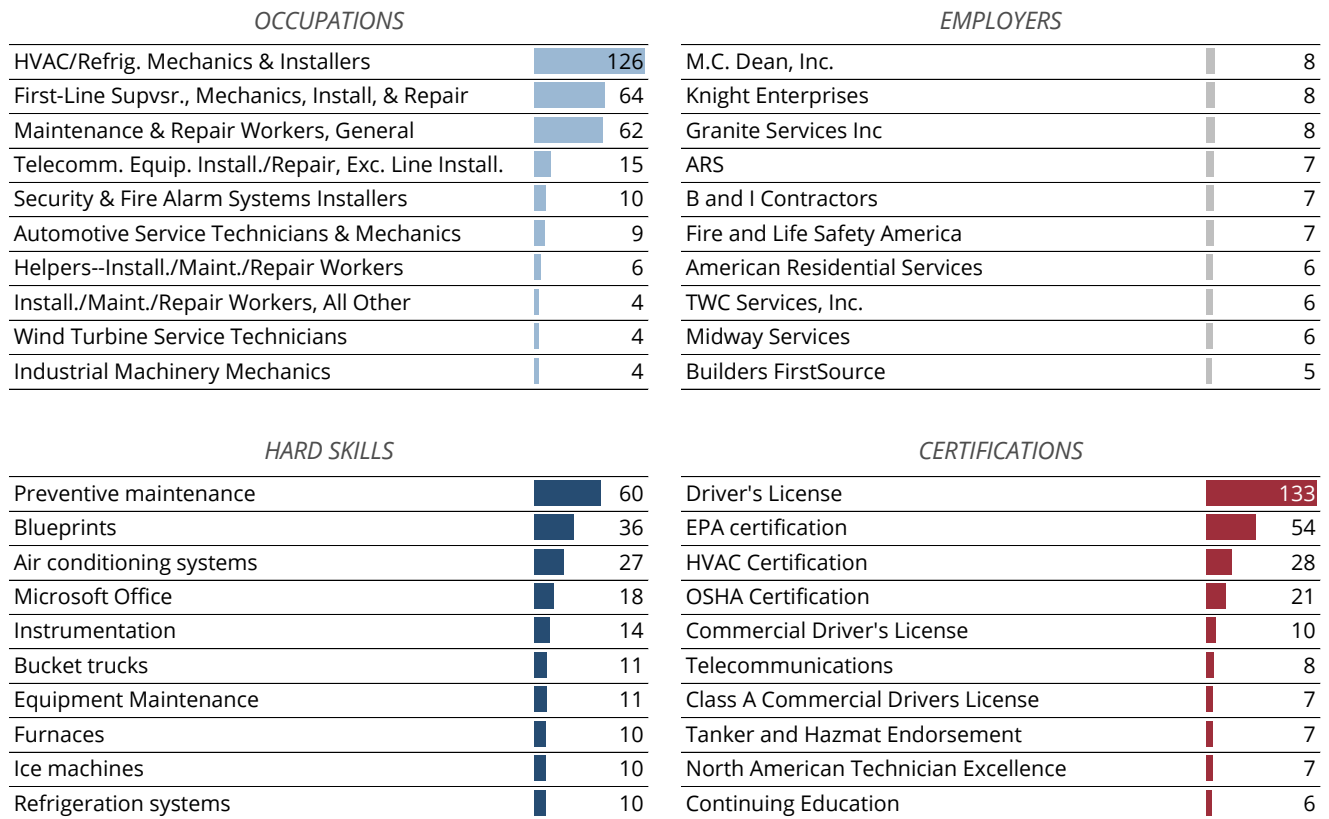
Source: Gartner Talent Neuron (formerly Wanted Analytics)

Note(s): Demand for some occupations (e.g., production or skilled trades workers) and industries (e.g., manufacturing and construction), may be under-stated in job postings data as these positions are somewhat less likely to be filled using on-line job postings.

**FIGURE 8. REAL-TIME LMI OVERVIEW: INSTALLATION, MAINT. & REPAIR OCCUPATIONS (SOC 49-0000)**  
 JOB POSTINGS IN **CONSTRUCTION INDUSTRIES**, TAMPA BAY MSA (JAN 1, 2018–JUN 30, 2018)



TOP 10 COUNTS (number of postings out of ~320 total from Jan 1, 2018–Jun 30, 2018)



Source: Gartner Talent Neuron (formerly Wanted Analytics)

Note(s): Demand for some occupations (e.g., production or skilled trades workers) and industries (e.g., manufacturing and construction), may be under-stated in job postings data as these positions are somewhat less likely to be filled using on-line job postings.



**TRAINING.** Figure 9 through Figure 11 provide an overview of training relevant to the Construction sector. Noncredit offerings are programs that do not lead to a degree. They include certificate programs, continuing education credits, and other types of workforce training programs.

A number of occupations in the Construction sector do not require formal training or degree programs and traditionally have relied on on-the-job training. However, the Tampa Bay region’s public higher education institutions offer a range of programs, such as apprenticeships, and certificate programs that support the various pathways of the sector.

In addition, regional school districts offer training in drafting, electricity, and building construction technologies. These programs train for various industry certifications including NCCER, OSHA 10, and Autodesk AutoCAD.

**FIGURE 9. NONCREDIT OFFERINGS BY CAREER PATHWAY FOR SELECTED SCHOOLS**

PATHWAY	HCC	SPC	PHSC	PTC
Construction			—	●
Design/Pre-Construction	●		—	●
Maintenance/Operations			—	●

**FIGURE 10. APPRENTICESHIP PROGRAMS BY CAREER PATHWAY**

	NUMBER
<b>TOTAL</b>	<b>48</b>
Construction	33
Design/Pre-Construction	
Maintenance/Operations	15

Sources: TIP Research (Figure 9), US DOL – ETA (Figure 10). Programs were categorized by career cluster and career pathway by TIP using O-Net. Pasco-Hernando State College non-credit courses were not available.

**FIGURE 11. DEGREE PROGRAM OFFERINGS: ARCHITECTURE & CONSTRUCTION CAREER CLUSTER SELECT REGIONAL INSTITUTIONS DURING THE 2016 ACADEMIC YEAR**

PATHWAY	USF-Main	USF-SP	HCC	PHSC	PTC-CW	PTC-SP	SPC
Construction	●	●	●	●		●	●
Design/Pre-Construction	●	●	●	●			●
Maintenance/Operations			●			●	

Source: National Center for Education Statistics, Integrated Postsecondary Education Data System (IPEDS).

Note(s): IPEDS data include only schools eligible to participate in federal financial aid programs. Programs were categorized by career cluster and career pathway by TIP using O-Net.

USF = University of South Florida; HCC = Hillsborough Community College; PHSC = Pasco-Hernando State College; PTC = Pinellas Technical College; SPC = St. Petersburg College.

**ASSOCIATIONS & RESOURCES.** Tampa Bay has a number of assets and initiatives that support the Construction sector. These include:

- *Associated Builders & Contractors, Florida Gulf Coast Chapter.* Associated Builders and Contractors (ABC) is a national association with 72 chapters representing 22,000 merit shop construction and construction-related firms. ABC's membership represents all specialties within the US construction industry and is comprised primarily of firms that perform work in the industrial and commercial sectors of the industry.
- *Tampa Bay Builders Association.* The Tampa Bay Builders Association (TBBA) is a trade organization, which works diligently to fulfill its mission by providing important services to enhance the building industry in Pasco, Pinellas and Hillsborough Counties. It is affiliated with the Florida Home Builders Association and the National Association of Home Builders and dates back to 1946. The TBBA is a volunteer organization comprised of builders, developers, trade contractors, suppliers, lending institutions, title companies, engineers, attorneys and other types of businesses that have a relationship to the building industry.
- *Florida Home Builders Association, Construction Workforce Taskforce.* Established by the Florida legislature, the Construction Workforce Task Force charged with addressing the shortage of skilled trades and qualified building inspectors in the state.
- *National Association of Women in Construction, Tampa Chapter.* The National Association of Women in Construction (NAWIC) Tampa Chapter founded in 1960, has spent over 50 years supporting women in construction in Hillsborough, Pinellas, Pasco, Polk, Sarasota and Manatee Counties. The Tampa Chapter is part of the Southeast Region, made of up chapters in Florida, Georgia, Alabama and Tennessee. NAWIC is committed to continual educational development for women currently working in the construction industry as well as those considering joining the industry. Training is provided nationally through the National Education Foundation Certification Programs and on the local level through initiative such as the CAD Design and Drafting Competition for high school students and Block Kids for elementary students. The Tampa Bay NAWIC Chapter also offer scholarships to students throughout Tampa Bay.
- *Build Tampa Bay.* Encourages high school students to explore career opportunities in construction-related fields. They organize an annual tradeshow and signing day. Companies participating in the Build Tampa Bay program offer a full four-year scholarship to young people who will be working full time and attending classes two nights a week.
- *Florida Apprenticeship Consortium.* St Petersburg College in partnership with Florida State College Jacksonville and Broward College to expand high-quality apprenticeships in construction and the trades.