

2017 Chapter Demographic Survey Results

AGC of America conducts an annual demographic survey of its Chapters in order to provide a more valuable and functional picture of and for AGC Chapters. The survey contained questions relating to chapter membership, budget and dues, chapter services, chapter and board structure, and communications. In 2017, 78 of AGC's 92 Chapters completed the Demographic Survey, representing a response rate of 84.8%.

Please note that any reporting of Chapter results refers specifically to those Chapters that responded to the survey, and may not necessarily be able to be extrapolated to all AGC Chapters. Similarly, while providing a statistical breakdown, this report does not consider Chapter size. Consequently when assessing results it is important to consider the diversity of markets and geography, budget, constituents and Chapter size. This survey is designed to provide Chapter executives, Chapter boards, and executive committees with information regarding comparable elements of structure, membership, offerings and tactics. We hope this survey allows you to benchmark your Chapter's own achievements while determining reasonable goals for growth and change.

KEY

25th Percentile: Twenty-five percent (25%) of Chapters are below this mark, and seventy-five percent (75%) are above this mark.
50th Percentile (Median): Fifty percent (50%) of Chapters are below this mark, and fifty percent (50%) are above this mark.
75th Percentile: Seventy-five percent (75%) of Chapters are below this mark, and twenty-five percent (25%) are above this mark.

MEMBERSHIP

OVERALL MEMBERSHIP

| | General Contractors | | Specialty Contractors | | Service & Supply | |
|-----------------|---------------------|-----------|-----------------------|------------|------------------|------------|
| | 2017 | 2016 | 2017 | 2016 | 2017 | 2016 |
| 25th Percentile | 29 | 30 | 39 | 53 | 60 | 65 |
| Average | 74 | 80 | 106 | 125 | 128 | 130 |
| 50th Percentile | 53 | 61 | 90 | 98 | 103 | 103 |
| 75th Percentile | 91 | 106 | 150 | 178 | 183 | 185 |

 The average Chapter has 74 general contractor members, 106 specialty contractor members, and 128 service/supplier members. All three counts represent a decrease from 2016.

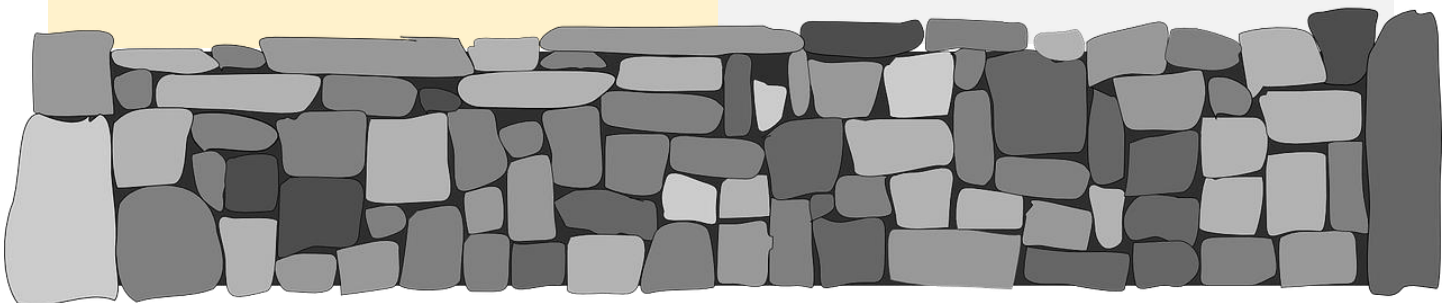
Open Shop & Union Contractor Members

54% of Chapters report that more than 80% of their general contractor members are open shop.

38% of Chapters report that more than one-third of their specialty contractor members are open shop.

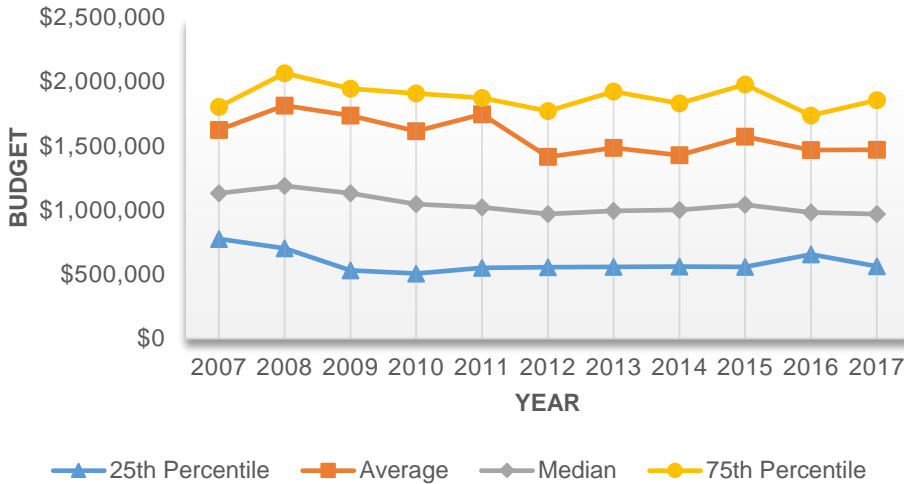
58% of Chapters report that fewer than 20% of their general contractor members are union.

56% of Chapters report that fewer than 20% of their specialty contractor members are union.



BUDGET, DUES & ADMINISTRATION

Chapter Budget (2007-2017)*



The average total revenue (most recent fiscal year) from membership dues and fees, including national dues collected, is \$950,139. Fifty-percent of Chapters reported a revenue below \$656,797. Both figures are a decrease from the previous year's survey, in which the average was \$994,669 and the median was \$668,800.

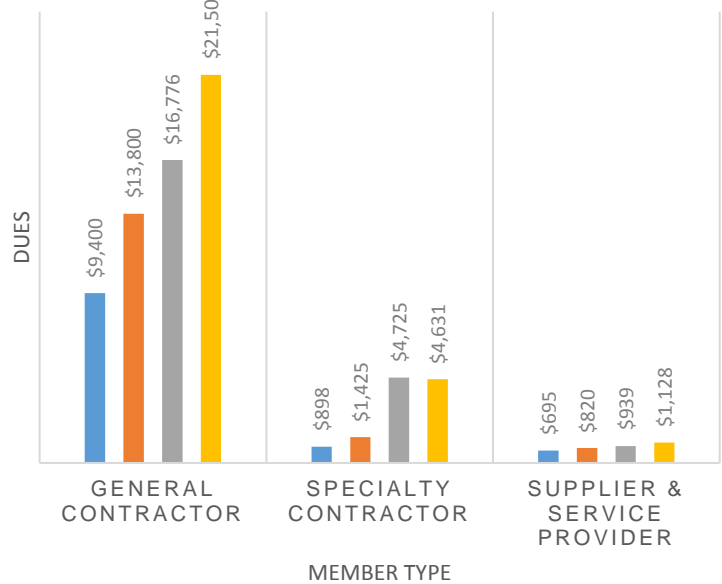
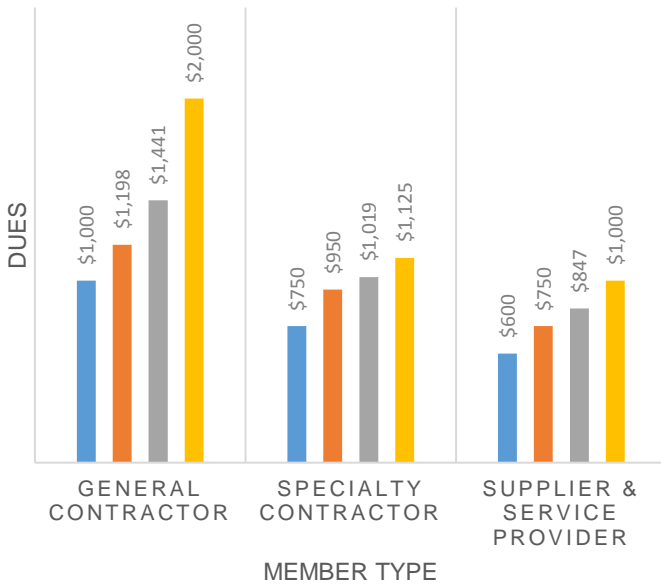
*Figures adjusted for inflation as of January 2017. Budget is exclusive of AGC National dues or charter fee.

Minimum Dues by Member Type

Maximum Dues by Member Type

■ 25th Percentile ■ Median ■ Average ■ 75th Percentile

■ 25th Percentile ■ Median ■ Average ■ 75th Percentile



47% of Chapter Executives have been with their Chapters ten years or less.

7.6 is the average number of full-time staff (including the Chapter Executive) per Chapter. Fifty-percent of Chapters have fewer than five full-time staff.

88% of Chapters allow dues payment by credit card. Only 43% allow dues payment by ACH.

CHAPTER SERVICES

Chapters' Government Relations Resources

| | 2017 | 2016 |
|--|-------|-------|
| State-Level Political Action Committee (PAC) | 85.1% | 85.7% |
| Federal-Level Political Action Committee (PAC) | 9.5% | 6.5% |
| Online Advocacy Tool | 69% | 59.7% |

Chapters' Safety & Health Offerings

| | 2017 | 2016 |
|--|-------|-------|
| OSHA Classes | 79.7% | 87.0% |
| Formal Safety Training Program for Hourly Craft Professionals | 46.0% | 44.2% |
| Formal Safety Training Program for Superintendents or Project Managers | 50.0% | 44.2% |
| Mobile Safety Services | 47.3% | 45.5% |
| Training for Local Vocational Schools, Colleges, or High Schools | 64.9% | 61.0% |
| Retirement Plan Administration | 29.7% | 31.2% |
| Sponsor a Health Insurance Program | 33.8% | 33.8% |
| Sponsor a Workers' Compensation Program | 46.0% | 42.9% |
| Safety Instruction and Training Materials in Spanish | 39.2% | 36.4% |

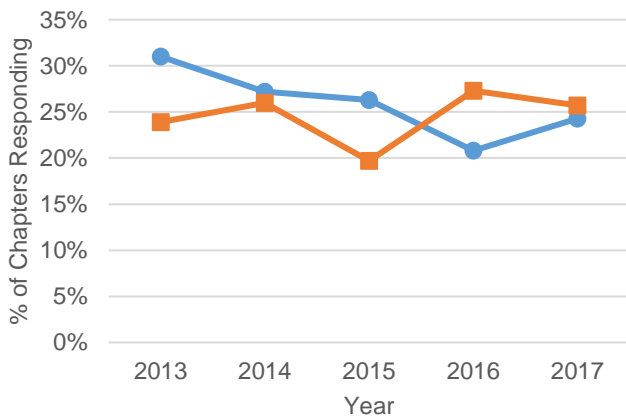
54% of Chapters conduct collective bargaining negotiations on behalf on construction contractors. (52% in 2016)

Top unions, with which negotiations are conducted: laborers (95%), operating engineers (92%), carpenters (90%), cement masons (85%), ironworkers (51%).

60% of Chapters promote or host the AGC Safety Management Training Course (SMTTC).

37% of Chapters promote or host the AGC Advanced Safety Management Training Course (ASMTTC).

Chapters Hosting or Sponsoring Open Shop and Craft Training Programs



● Open Shop Craft Training ■ Union Craft Training

51% of Chapters use a job board or placement services. (35% in 2016)

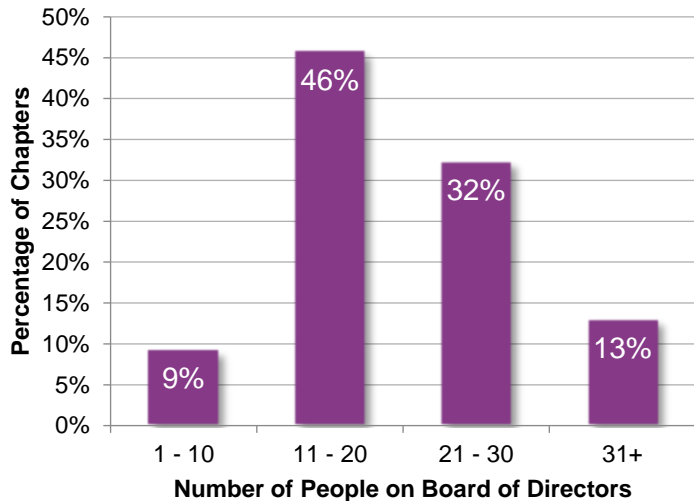
69% of Chapters are involved in a dedicated program to recruit/train future construction workers.

Chapters' Training Offerings

| | 2017 | 2016 |
|--|-------|-------|
| Online Training | 36.5% | 44.2% |
| Webinars | 37.8% | 31.2% |
| AGC Supervisory Training Program (STP) Classes | 47.3% | 50.7% |
| Building Information Modeling Education Program (BIM EP) Classes | 44.6% | 50.7% |
| Lean Construction Education Program (LCEP) Classes | 41.9% | 41.6% |
| Project Manager Development Program (PMDP) Classes | 33.8% | 31.2% |
| Sponsors a Charter School or Academy for Construction Technologies | 24.3% | 18.2% |

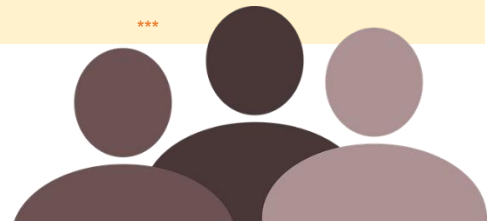
CHAPTER STRUCTURE

Chapter Board of Directors Size



2.7 is the average Chapter Board of Directors member term (if applicable) in years.

5 is the most commonly reported Chapter Executive Board size, with 24% of Chapters having a board of this size.



82% of Chapters allow specialty contractors to serve as Board of Directors members.

Approximately 53% of Chapters allow specialty contractors to serve as officers.

58% of Chapters open their Board of Directors meetings to the general membership.

81% of Chapters conduct strategic planning. (69% in 2016)

Chapter Committees & Task Forces

| | 2017 | 2016 |
|--|-------------|-------------|
| Municipal or Utility Construction Committee/Task Force | 28.4% | 26.0% |
| Technology Committee/Task Force | 31.1% | 26.0% |
| Federal Contractors Committees | 14.9% | 10.4% |
| Specialty Contractors Council | 20.3% | 27.3% |
| Service and Supply Council | 29.7% | 31.2% |

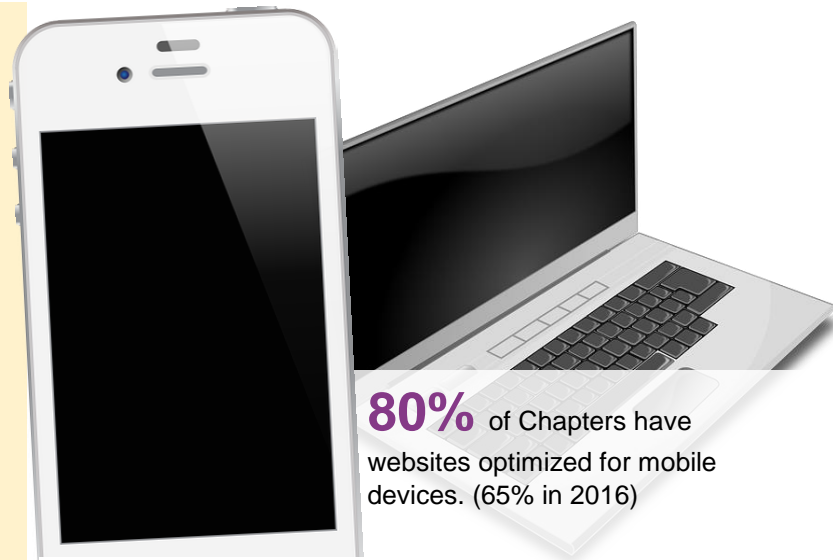
Member Outreach Resources

| | 2017 | 2016 |
|---|-------------|-------------|
| Construction Leadership Council (CLC), Young Constructors Forum (YCF), or Future Leadership Group | 75.7% | 72.7% |
| Membership Development Specialist | 56.8% | 50.7% |
| Affiliation with AGC Student Chapter | 78.4% | 72.7% |
| Scholarship Fund | 89.2% | 81.8% |
| Foundation | 48.7% | 53.3% |
| Annual Awards Program | 82.4% | 74.0% |
| Affiliation with Other National Trade Association | 28.4% | 22.1% |

COMMUNICATIONS

How Chapters Communicate with Members

| | 2017 | 2016 |
|-----------------------------------|-------|-------|
| Issue Alerts (Electronic) | 93.2% | 64.9% |
| Issue Alerts (Printed) | 9.5% | 13.0% |
| Magazine (Electronic) | 17.6% | - |
| Magazine (Printed) | 39.2% | - |
| Membership Directory (Electronic) | 81.1% | 71.4% |
| Membership Directory (Printed) | 78.4% | 72.7% |
| Newsletters (Electronic) | 89.2% | 83.1% |
| Newsletters (Printed) | 14.9% | 15.6% |
| Project Bulletin (Electronic) | 40.5% | 33.8% |
| Project Bulletin (Printed) | 5.4% | 6.5% |



80% of Chapters have websites optimized for mobile devices. (65% in 2016)

32% of Chapters have one or more mobile apps. (18% in 2016)



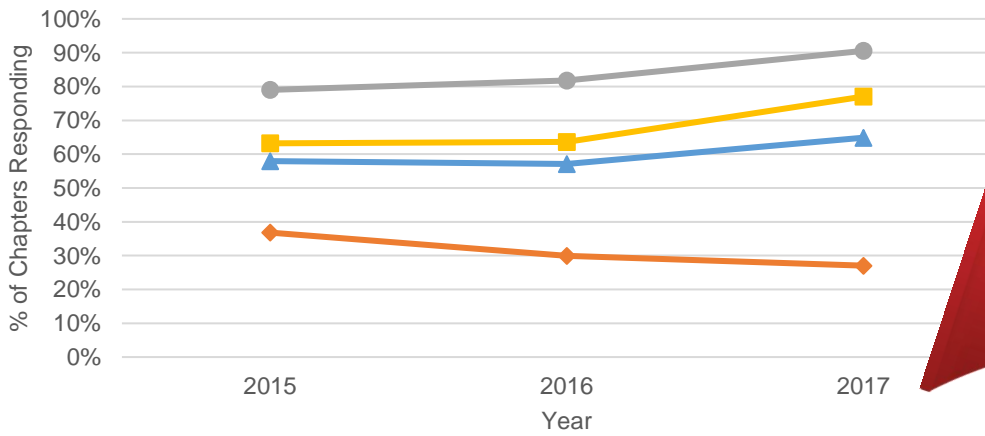
Chapter Website Resources

| | 2017 | 2016 |
|---|-------|-------|
| Member Benefits / Discount Programs Section | 91.9% | 88.3% |
| Member Directory | 91.9% | 94.8% |
| Event Registration | 85.1% | 80.5% |
| "Members Only" Content | 64.9% | 74.0% |
| Online Store | 27.0% | 23.4% |
| Join / Renew Portal | 64.9% | - |

How Chapters Communicate with Media

| | 2017 | 2016 |
|--|-------|-------|
| News releases | 94.4% | 87.0% |
| Cultivating reporter relationships | 63.4% | 57.1% |
| Participate in or arrange own media events | 56.3% | 52.0% |

Chapter Social Media Trends



▲ LinkedIn Profile
 ◆ LinkedIn Groups
 ● Facebook Page
 ■ Twitter Account

