



## **Who Are NAHB's Associate Members?**

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**Economics and Housing Policy**

**National Association of Home Builders**

Every year since 2008, the National Association of Home Builders (NAHB) has conducted an annual census that collects company and demographic data from its members. It subsequently publishes these results here in HousingEconomics.com.

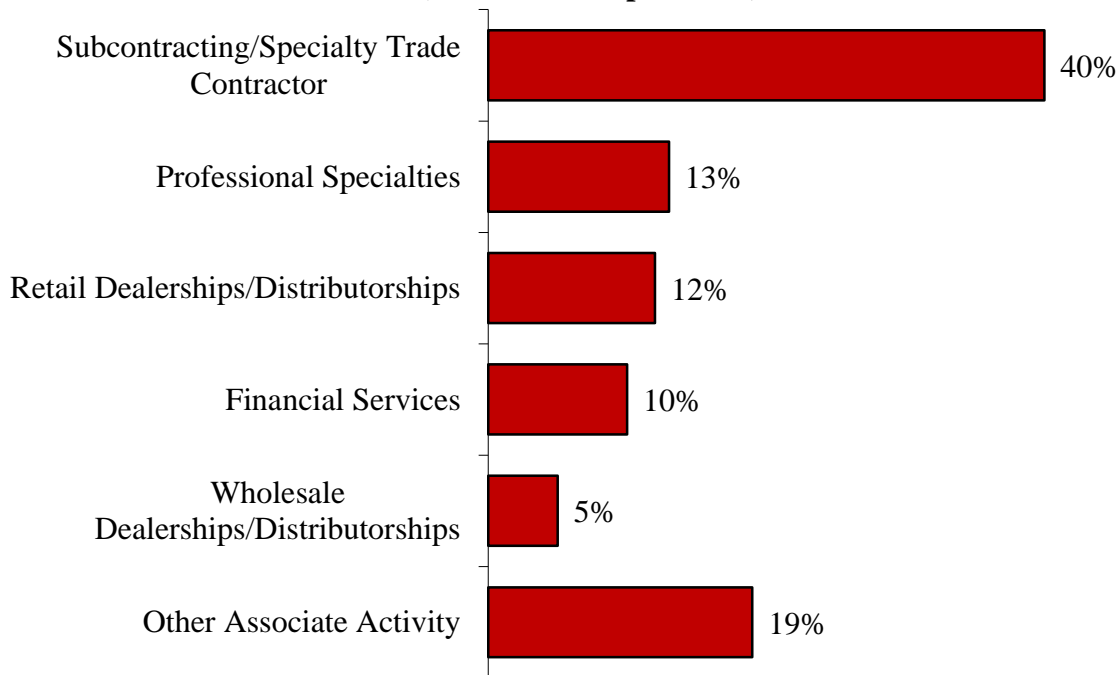
This article updates previous studies with results from the 2015 annual census on the characteristics of NAHB's associate members. Associate members are involved in a wide range of supportive industries and professions including, among others, trade contractors, manufacturers, retailers/distributors, designers, and architects. Builder members are defined as those whose primary business is single-family home building, multifamily building, residential or commercial remodeling, commercial building, land development, or manufacturing of modular/panelized/log homes. Findings from the 2014 Associate Census can be found [here](#) and Builder Census [here](#). At the end of 2015, 82,070 associate members represented 68 percent of the total NAHB membership. Builder members make up the remaining 32 percent and an article highlighting them can be found [here](#).

### **40% of Associate Members are Subcontractors/Specialty Trade Contractors**

Associate members could self-identify as one of 42 specialties when selecting a primary activity. These activities are grouped into 6 categories: 40 percent of associate members are subcontractors/specialty trade contractors, 13 percent have a professional specialty, 12 percent are

retail dealers/distributors, 10 percent work in financial services, and 5 percent are wholesale dealers/distributors. Nineteen percent listed some other associate activity as their primary business (Exhibit 1).

**Exhibit 1. Share of Associate Members by Primary Business Activity - 2015**  
(Percent of Respondents)



The share of associate members involved in any one activity shifted by 1 percentage point or less between 2014 and 2015 (Exhibit 2). When primary business activities are grouped into the broader categories, however, some trends can be detected over time. The share of associate members who work in financial services, for example, has risen from 7 percent in 2011 to 10 percent in the last three years (2013-2015). The share who are in subcontracting/specialty trade contractors fell from 40 percent in 2012 to 36 percent in 2014, but then bounced back to 40 percent in 2015. Similarly, the share who report some other type of associate activity (manufacturing, property management, real estate, utilities, industry consultant, trade association/non-profit, or one not listed) rose from 16 percent in 2011 to 23 percent in 2014, but retreated again in 2015 to 19 percent.

**Exhibit 2. Primary Business Activity – HISTORY**  
(Percent of Respondents)

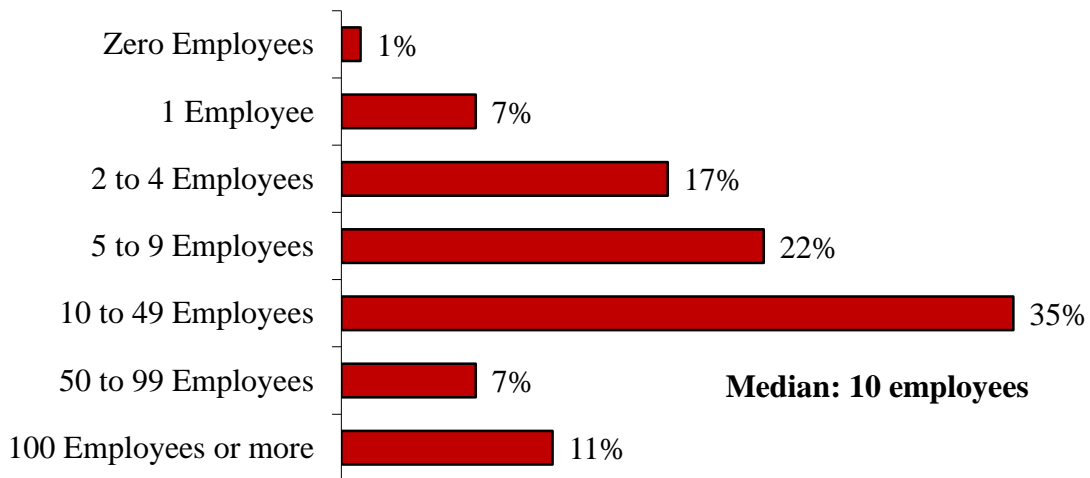
	2008	2009	2010	2011	2012	2013	2014	2015
<b><i>Subcontracting/Specialty Trade Contractor</i></b>	<b>34%</b>	<b>39%</b>	<b>43%</b>	<b>39%</b>	<b>40%</b>	<b>39%</b>	<b>36%</b>	<b>40%</b>
Carpentry work	3	3	4	4	4	3	3	4
Electrical work	3	3	4	3	3	3	2	3
Masonry, Stone Work, Tile Setting and Landscaping	3	3	3	3	3	3	2	2
Plumbing, Heating and Air conditioning	2	2	2	2	3	2	2	2
Roofing, Siding and Sheet Metal Work	5	6	7	4	6	7	6	6
Painting and Paper Hanging	2	2	3	3	3	3	2	2
Floor Laying and Other Floor Work	2	1	3	2	2	2	2	2
Concrete Work	1	1	2	2	1	1	1	2
Excavation Work	2	2	3	2	3	2	2	2
Insulation Work	2	1	2	2	2	2	1	2
Drywall Installation	NA	NA	NA	NA	1	1	1	1
Security Systems	NA	NA	NA	NA	1	1	1	1
Home Technology	1	*	1	1	1	1	1	1
Other Subcontracting	NA	NA	NA	NA	NA	NA	NA	1
	10	14	10	12	8	7	8	8
<b><i>Professional Specialties</i></b>	<b>12</b>	<b>18</b>	<b>12</b>	<b>12</b>	<b>13</b>	<b>13</b>	<b>13</b>	<b>13</b>
Accounting	1	2	2	1	1	1	1	1
Architecture	2	2	2	1	2	2	2	2
Engineering	3	4	3	1	3	3	3	3
Planning or Designing	2	4	2	4	2	3	3	2
Legal Services	1	2	1	1	1	1	2	1
Computer Products and Services	*	*	*	*	*	*	*	*
Marketing, Advertising or Public Relations	3	4	2	2	2	2	2	2
Land Surveyor	*	1	*	1	1	1	*	*
<b><i>Retail Dealerships/Distributorships</i></b>	<b>13</b>	<b>11</b>	<b>11</b>	<b>10</b>	<b>11</b>	<b>11</b>	<b>10</b>	<b>12</b>
Retail Appliances	1	1	1	1	1	1	1	1
Retail Building Materials/Lumber	4	4	5	3	4	4	4	4
Retail Floor Coverings	2	1	2	1	2	2	1	2
Retail Paint/Wall Coverings	1	*	*	1	*	*	*	*
Other Retail Dealership	5	5	4	5	4	4	4	5
<b><i>Financial Services</i></b>	<b>8</b>	<b>10</b>	<b>8</b>	<b>7</b>	<b>9</b>	<b>10</b>	<b>10</b>	<b>10</b>
Commercial Banking/Thrift Institution	2	3	2	1	2	2	2	2
Mortgage Banking	2	2	2	2	2	3	3	3
Insurance or Title Company	4	5	5	4	5	5	5	5
<b><i>Wholesale Dealerships/Distributorships</i></b>	<b>3</b>	<b>5</b>	<b>5</b>	<b>5</b>	<b>6</b>	<b>5</b>	<b>6</b>	<b>5</b>
Wholesale Appliances	*	1	1	*	1	*	*	*
Wholesale Building Materials/Lumber	1	2	2	2	2	2	2	2
Wholesale Floor Coverings	*	*	1	1	*	1	1	1
Wholesale Paint/Wall Coverings	*	*	*	*	*	*	*	*
Other Wholesale Dealership	2	2	2	2	2	2	2	2
<b><i>Other Associate Activity</i></b>	<b>19</b>	<b>15</b>	<b>19</b>	<b>16</b>	<b>21</b>	<b>22</b>	<b>23</b>	<b>19</b>
Manufacturing	6	3	3	2	4	4	4	3
Property Management	1	1	1	1	1	1	1	1
Real Estate	3	3	3	3	3	3	4	3
Utilities	1	1	2	2	2	2	2	1
Industry Consultant	NA	NA	NA	1	1	1	1	1
Trade Associate/Non-Profit	NA	NA	NA	1	1	1	1	1
Other	7	7	10	7	10	10	11	9
No Primary Activity Listed	NA	NA	NA	10	1	1	1	1

\*Less than 0.5%

## Approximately Half of Associates Have 10 or More Employees

In 2015, associate members had a median<sup>1</sup> of 10 employees on payroll, one more than the median employee count recorded in 2014 and 2013. In 2015, 7 percent of associate members had 1 employee, 17 percent 2 to 4 employees, 22 percent had 5 to 9, 35 percent had 10 to 49, 7 percent had 50 to 99 employees, and 11 percent had 100 or more paid employees. One percent had no payroll at all (Exhibit 3).

**Exhibit 3. Total Number of Employees on Payroll - 2015**  
*(Percent of Respondents)*



The median number of employees on an associate member's payroll varies significantly by the company's primary activity. Among wholesale dealerships/distributorships, the median number of payroll employees in 2015 was 20, compared to 18 among financial services companies, 14 among retail dealerships/distributorships, 9 among subcontractors/specialty trade contractors, and 8 among professional specialty companies. Members that selected their company's primary activity as 'other associate activity' reported a median of 10 employees.

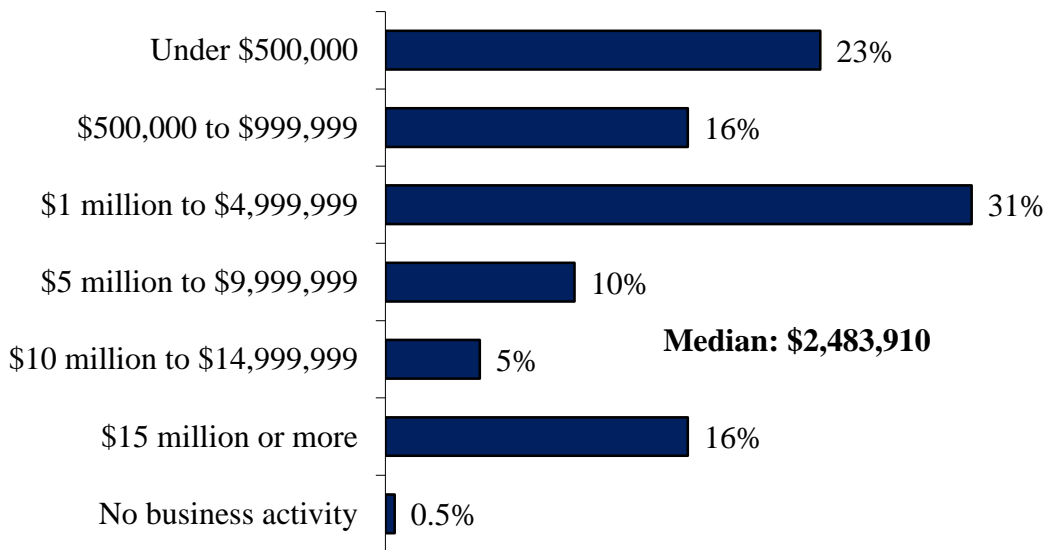
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<sup>1</sup> This article will use median values, as averages can be inflated by large companies. Medians are largely unaffected by these outliers because it calculates the middle most value, not taking into account how high the highest values are. An increase in a median's value indicates an overall shift of all the associate members, not a change in a few large associate members.

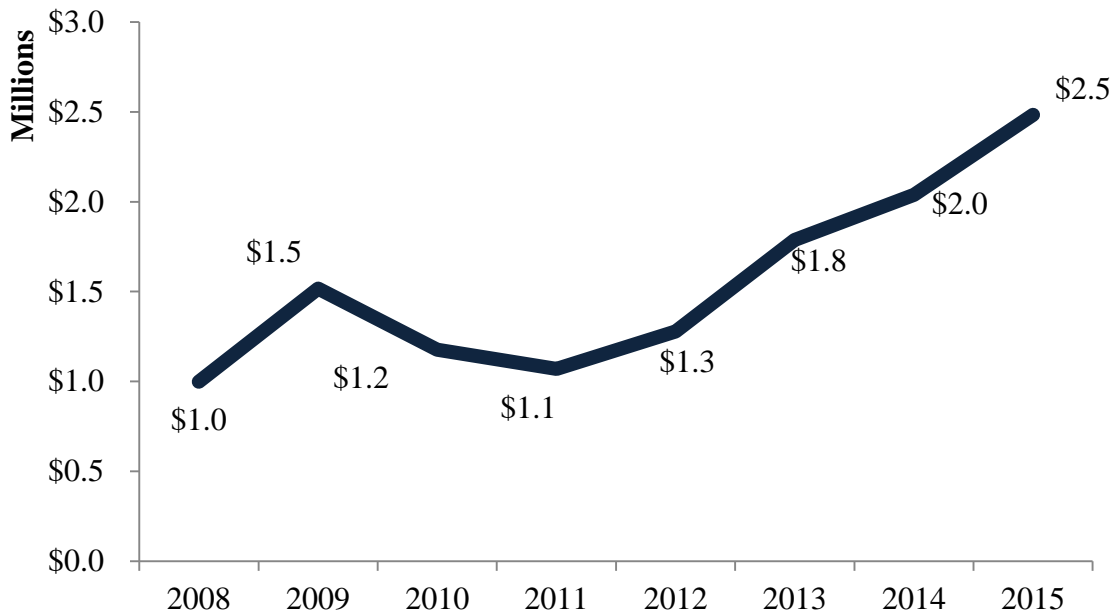
## Median Dollar Volume Continues to Climb

At \$2,483,910, the median dollar volume of associate members in 2015 was the highest it has been since the membership census was launched in 2008. Twenty-three percent of associate members reported a 2015 dollar volume of less than \$500,000, 16 percent reported between \$500,000 and \$999,999, 31 percent between \$1.0 million and \$4.9 million, 10 percent between \$5.0 million and \$9.9 million, 5 percent between \$10.0 million and \$14.9 million, and 16 percent reported their dollar volume in 2015 at \$15.0 million or more. Less than 0.5 percent of associate members reported no business activity in 2015 (Exhibit 4 & 5).

**Exhibit 4. Annual Revenue - 2015**  
*(Percent of Respondents)*



**Exhibit 5. Annual Revenue – History**  
(Median, millions of dollars)

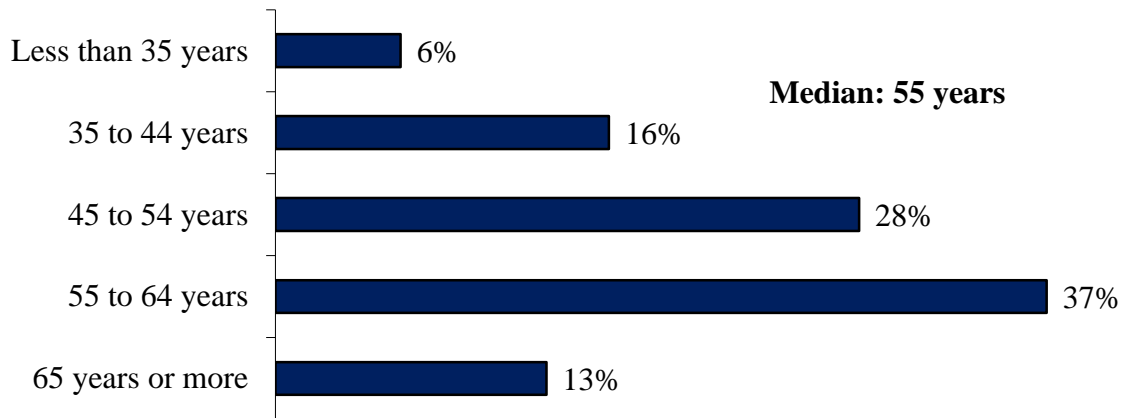


Levels of revenue also vary widely across primary activity categories. Financial service members reported a median \$9.7 million in dollar volume for 2015, compared to \$9.3 million for wholesale dealership/distributor members, \$4.3 million for retail dealership/distributor members, \$1.3 million for professional specialty members, \$1 million for subcontractor/specialty trade contractor members, and \$2.6 million for members involved in some other associate activity.

## **Age**

The median age of NAHB associate members in 2015 was 55 years. Twenty-two percent of associate members are younger than 45 years of age, 28 percent are 45 to 54, 37 percent are 55 to 64, and the remaining 13 percent are 65 or older (Exhibit 6).

**Exhibit 6. Age - 2015**  
*(Percent of Respondents)*



The median age of NAHB associate members has steadily increased over time. When the membership census was first launched in 2008, the median age of associate members was 50. It then increased to 52 in 2009, 53 in 2011, and to 54 in 2012 (Exhibit 7).

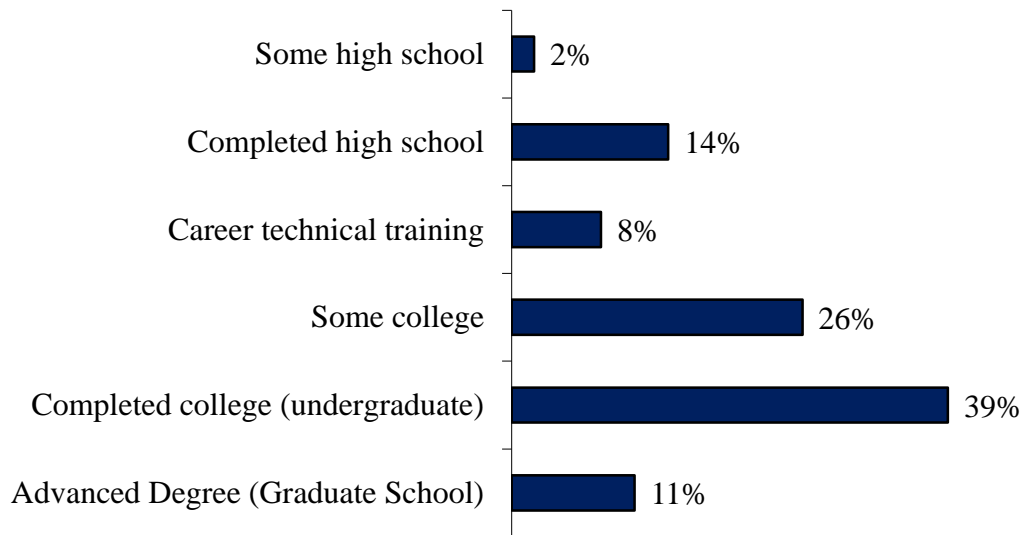
**Exhibit 7. Median Age - HISTORY**  
*(Percent of Respondents)*

	2008	2009	2010	2011	2012	2013	2014	2015
Median (years)	50	52	52	53	54	54	54	55

**Half of Associate Members Have a Degree**

Since 2008, the share of NAHB associate members with a college or advanced degree has been at or above 50 percent. In 2015, only 2 percent did not finish high school. Fourteen percent completed high school, 8 percent have career technical training, 26 percent have had some college education, 39 percent finished college, and 11 percent have a graduate degree (Exhibit 8).

**Exhibit 8. Education - 2015**  
*(Percent of Respondents)*

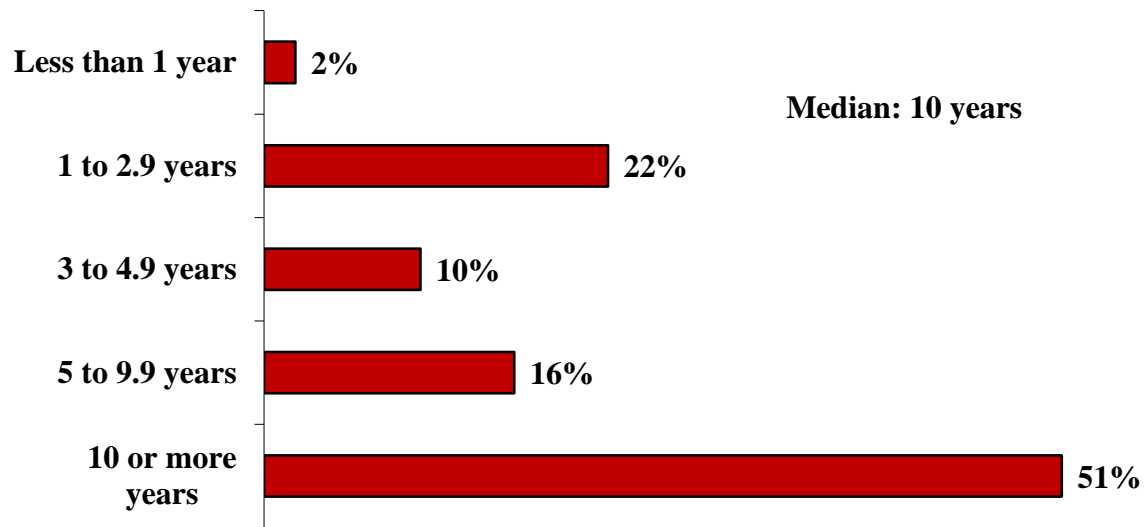


The share of associate members with a degree (either undergraduate or graduate) differs across primary activity categories. Seventy-nine percent of professional specialty members have a degree, compared to 65 percent of financial services members, 59 percent of wholesale dealership/distributorship members, 47 percent of retail dealership/distributorship members, 33 percent of subcontractor/specialty trade contractor members, and 59 percent of members in some other associate activity.

**More than Half Have Been Members for a Decade or More**

Fifty-one percent of associate members have been NAHB members for more than a decade. Sixteen percent have been members for 5 to 9.9 years, 10 percent for 3 or 4.9 years, and 24 percent have been members for less than 3 years (Exhibit 9).

**Exhibit 9. Tenure as NAHB Member - 2015**  
*(Percent of Respondents)*



A profile for each category of associate member is available in the “Additional Resources” box at the top of this article.

## PROFILES BY ASSOCIATE MEMBER CATEGORY

### Subcontracting/Specialty Trade Contractors in 2015

	2008	2009	2010	2011	2012	2013	2014	2015
<b>Number of Subcontracting /Specialty trade contractor Members</b>	49,382	44,351	42,070	34,574	30,974	32,160	28,802	32,441

### Company Profile

**1. Primary business activities covered are:** Carpentry work, Electrical work, Masonry, Stone work, Tile setting and Plastering, Landscaping, Plumbing, Heating and Air Conditioning, Roofing, Siding and Sheet Metal Work, Painting and Paper Hanging, Floor laying and other Floor work, Concrete work, Excavation work, Insulation work, Drywall Installation, Security Systems, Home Technology, and Other Subcontracting.

**2. No. of employees on payroll (Average):**

Construction Employees:	<b>20.8</b>
Non-construction Employees:	<b>14.3</b>
Total:	<b>35.1</b>

*(Five percent of the subcontracting/specialty trade contractors have 50 to 99 employees and 5 percent have 100 employees or more.)*

**3. Dollar volume of company's business activity (Median):** **\$980,742**

*(Only 5 percent of the subcontracting/specialty trade contractors had \$15 million or more in business activity.)*

### Member Profile

**1. No. of years as a member of NAHB (Average):** **11 years**

**2. Age (Median):** **54 years**

**3. Gender:** **Male: 88%**  
**Female: 12%**

**4. Race/Ethnicity:** **White: 96%**  
**Hispanic: 4%**

**5. Education:** **32 percent of subcontracting/special trade contractors have completed college or have an advanced degree and 28 percent have some college education.**

## Professional Specialty Members in 2015

	2008	2009	2010	2011	2012	2013	2014	2015
<b>Number of Professional Specialty Members</b>	18,242	19,609	12,652	10,789	10,754	10,502	10,744	10,265

### Company Profile

**1. Primary business activities covered are:** Accounting, Architecture, Engineering, Planning or Designing, Legal Services, Computer Products and Services, Marketing, Advertising or Public Relations, and Land Surveyor.

**2. No. of employees on payroll (Average):**

Construction Employees:	<b>2.8</b>
Non-construction Employees:	<b>41.4</b>
Total:	<b>44.2</b>

*(Six percent of the professional specialty members have 50 to 99 employees, and 10 percent have 100 employees or more.)*

**3. Dollar volume of company's business activity (Median):** **\$1,319,457**

*(Ten percent of the professional specialty members had \$15 million or more in business activity.)*

### Member Profile

**1. No. of years as a member of NAHB (Average):** **11 years**

**2. Age (Median):** **55 years**

**3. Gender:**  
**Male: 76%**  
**Female: 24%**

**4. Race/Ethnicity:**  
**White: 97%**  
**Hispanic: 3%**

**5. Education:** **80 percent of professional specialty members have completed college or have an advanced degree and 14 percent have some college education.**

## Retail Dealership/Distributors in 2015

	2008	2009	2010	2011	2012	2013	2014	2015
<b>Number of Retail dealership/ distributor Members</b>	<b>18,776</b>	<b>13,009</b>	<b>11,014</b>	<b>9,182</b>	<b>8,939</b>	<b>9,090</b>	<b>8,719</b>	<b>9,782</b>

### Company Profile

**1. Primary business activities covered are:** Retail Appliances, Retail Building Materials/Lumber, Retail Floor Coverings, Retail Paint/Wall Coverings and Other Retail Dealerships.

**2. No. of employees on payroll (Average):**

Construction Employees:	<b>17.2</b>
Non-construction Employees:	<b>71.9</b>
Total:	<b>89.1</b>

*(Eight percent of the retail dealerships/distributors have 50 to 99 employees and 10 percent have 100 employees or more.)*

**3. Dollar volume of company's business activity (Median):** **\$4,343,970**

*(Nineteen percent of retail dealerships/distributors had \$15 million or more in business activity.)*

### Member Profile

**1. No. of years as a member of NAHB (Average):** **14 years**

**2. Age (Median):** **56 years**

**3. Gender:** **Male: 83%**  
**Female: 17%**

**4. Race/Ethnicity:** **White: 98%**  
**Hispanic: 1%**

**5. Education:** **47 percent of retail dealerships/distributors have completed college or have an advanced degree and 30 percent have some college education.**

## Financial Services Members in 2015

	2008	2009	2010	2011	2012	2013	2014	2015
<b>Number of Financial Services Members</b>	11,974	11,197	8,340	6,492	7,508	8,426	8,710	8,492

### Company Profile

**1. Primary business activities covered are:** Commercial Banking/Thrift Institution, Mortgage Banking and Insurance or Title Company.

**2. No. of employees on payroll (Average):**

Construction Employees:	<b>17.6</b>
Non-construction Employees:	<b>200.8</b>
Total:	<b>218.4</b>

*(Eleven percent of financial services members have 50 to 99 employees and 27 percent have 100 employees or more.)*

**3. Dollar volume of company's business activity (Median):** **\$9,691,406**

*(Forty-three percent of financial services members had \$15 million or more in business activity.)*

### Member Profile

**1. No. of years as a member of NAHB (Average):** **12 years**

**2. Age (Median):** **54 years**

**3. Gender:** **Male: 67%**  
**Female: 33%**

**4. Race/Ethnicity:** **White: 97%**  
**Hispanic: 4%**

**5. Education:** **65 percent of financial services members have completed college or have an advanced degree and 28 percent have some college education.**

## Wholesale Dealerships/Distributors in 2015

	2008	2009	2010	2011	2012	2013	2014	2015
<b>Number of Wholesale dealership/distributor Members</b>	5,676	6,734	5,453	4,300	4,759	4,384	4,644	4,466

### Company Profile

**1. Primary business activities covered are:** Wholesale Appliances, Wholesale Building Materials/Lumber, Wholesale Floor Coverings, Wholesale Paint/Wall Coverings and Other Wholesale Dealerships.

**2. No. of employees on payroll (Average):**

Construction Employees:	<b>32.0</b>
Non-construction Employees:	<b>87.4</b>
Total:	<b>119.5</b>

*(Ten percent of the wholesale dealerships/distributors have 50 to 99 employees and 21 percent have 100 employees or more.)*

**3. Dollar volume of company's business activity (Median):** **\$9,255,680**

*(Thirty-seven percent of wholesale dealerships/distributors had \$15 million or more in business activity.)*

### Member Profile

**1. No. of years as a member of NAHB (Average):** **14 years**

**2. Age (Median):** **55 years**

**3. Gender:** **Male: 82%**  
**Female: 18%**

**4. Race/Ethnicity:** **White: 97%**  
**Hispanic: 3%**

**5. Education:** **59 percent of wholesale dealerships/distributors have completed college or have an advanced degree and 27 percent have some college education.**

## Other Associate Activity Members in 2015

	2008	2009	2010	2011	2012	2013	2014	2015
<b>Number of Other Associate Members</b>	<b>40,153</b>	<b>16,980</b>	<b>18,353</b>	<b>14,410</b>	<b>17,240</b>	<b>18,011</b>	<b>19,054</b>	<b>15,591</b>

### Company Profile

**1. Primary business activities covered are:** Manufacturing, Property Management, Real Estate, Utilities, Industry Consultant, Trade Association/Non-Profit, and Other Associate Activities

**2. No. of employees on payroll (Average):**

Construction Employees:	<b>45.3</b>
Non-construction Employees:	<b>85.9</b>
Total:	<b>131.2</b>

*(Eight percent of other associate members have 50 to 99 employees and 13 percent have 100 employees or more.)*

**3. Dollar volume of company's business activity (Median):** **\$2,565,369**

*(Eighteen percent of other associate members had \$15 million or more in business activity.)*

### Member Profile

**1. No. of years as a member of NAHB (Average):** **10 years**

**2. Age (Median):** **56 years**

**3. Gender:**  
**Male: 71%**  
**Female: 29%**

**4. Race/Ethnicity:**  
**White: 97%**  
**Hispanic: 3%**

**5. Education:** **59 percent of other associate members have completed college or have an advanced degree and 25 percent have some college education.**