

## Who Are NAHB's Associate Members?

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Special Study for Housing Economics  
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The National Association of Home Builders (NAHB) has conducted an annual census of its members every year since 2008. The census is divided into builder and associate members. Associate members are involved in a wide range of support industries and professions including, among others, trade contractors, manufacturers, retailers/distributors, designers, and architects. This article updates an [earlier study](#) on associate members with results from the latest NAHB census, conducted at the end of 2023. At that time NAHB had roughly 70,000 associate members, accounting for approximately 65% of NAHB's 108,000 members (the remainder being NAHB's builder members, who were covered in the [July Special Study](#)).

Characteristics of NAHB's associate members in 2023 include the following:

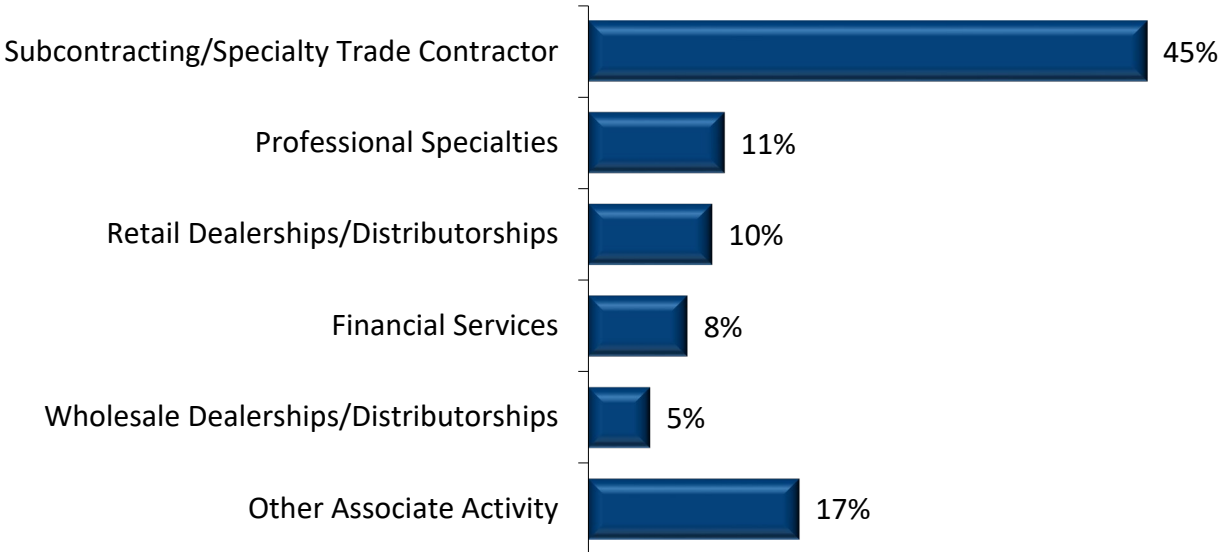
- Among the major categories of associates, the largest share (45%) are special trade contracts/subcontractors.
- Median gross revenue in 2023 was \$3.0 million, up from \$2.84 million in 2022.
- 39% say they contribute in some way to the development of green/sustainable homes.
- The share of NAHB associate members who are female is 24%, down from an all-time high of 26% in 2022.

The next sections describe these results in more detail, including how they have evolved over time, as well as showing results on associate members' demographics and educational attainment. At the end of the exposition, there is a series of profiles showing basic statistics for each of the major categories of NAHB's associate members.

## 45% of Associate Members are Subcontracting/Specialty Trade Contractors

The NAHB census asks associate members to identify one of 43 specialties as the primary activity of their business. These detailed specialties are grouped into 6 broader categories. Among these broader categories, 45% of associate members identified themselves as subcontractors/specialty trade contractors, 11% have a professional specialty business (e.g., architecture, engineering, marketing, accounting, legal, etc.), 10% are retail dealers/distributors, 8% provide financial services, and 5% are wholesale dealers/distributors. The remaining 17% listed some “other associate” activity as their primary business (fig 1.).

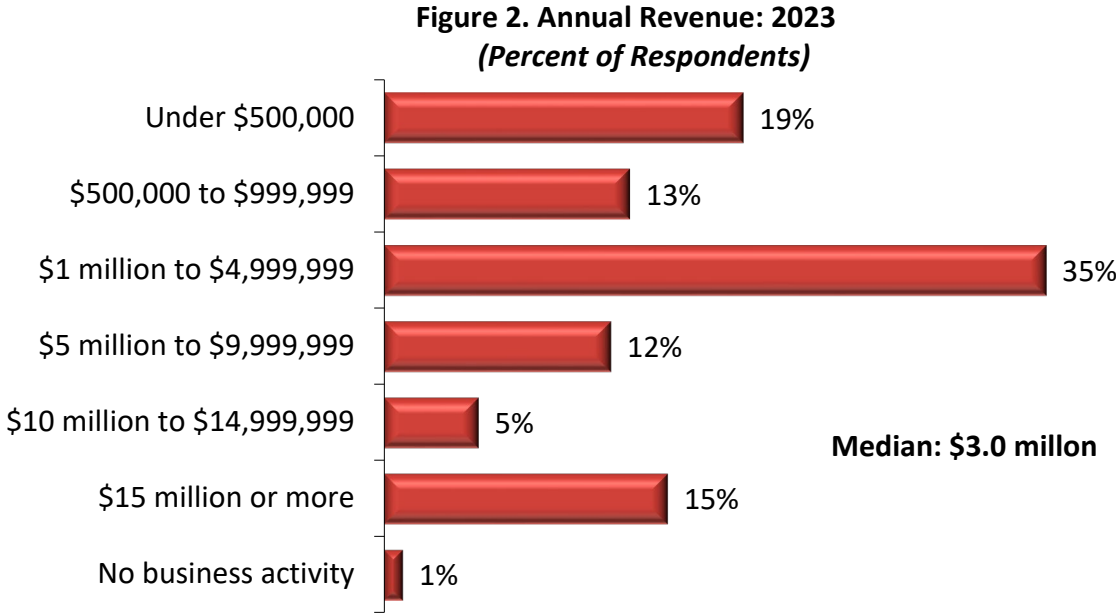
**Figure 1. Primary Business Activity During 2023  
(Percent of Respondents)**



The share of associate members who identified primarily as subcontractors/specialty trade contractors increased from 41% in 2022 to 45% in 2023, while the shares involved with retail dealerships/distributorships edged up one percentage point to 10%. On the other hand, the share of associates primarily involved in professional specialties and financial services fell two percentage points to 11% and 8%, respectively. Additionally, the share of other associate activities dropped one percentage point to 17%. The associate shares primarily involved in wholesale dealerships/distributorships was the only category that remained unchanged from 2022 to 2023, at 5%.

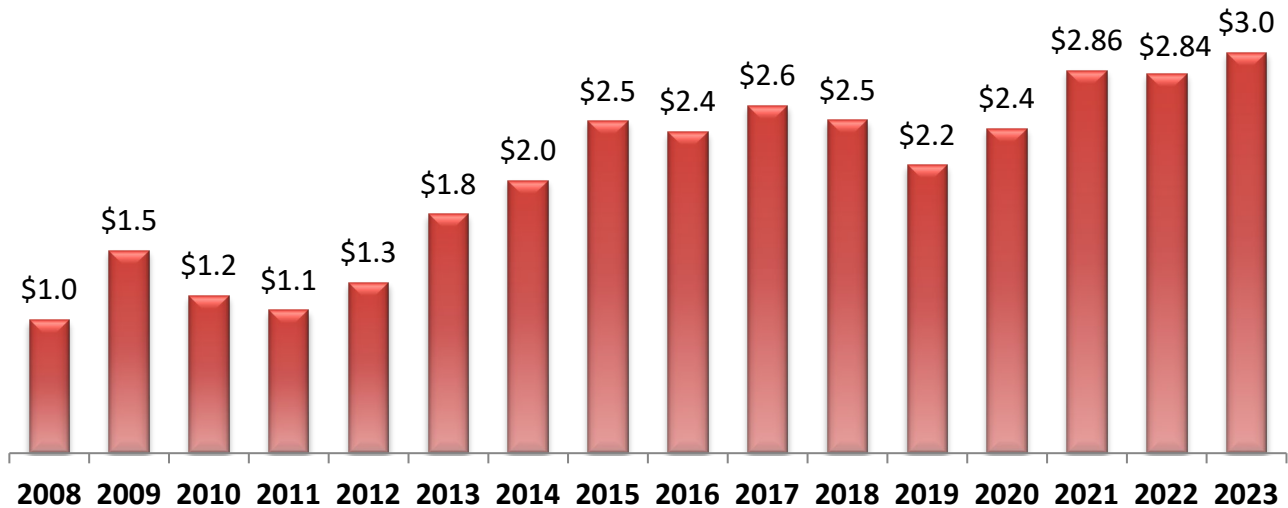
## Median Dollar Volume Increases in 2023

The median dollar volume for associate members increased slightly between 2022 and 2023, from \$2.84 to \$3.0 million. Nineteen percent of associate members reported a 2023 dollar volume of less than \$500,000, 13% reported between \$500,000 and \$999,999, 35% (the plurality) between \$1.0 million and \$4.9 million, 12% between \$5.0 million and \$9.9 million, 5% between \$10.0 million and \$14.9 million, and 15% reported their dollar volume in 2023 at \$15.0 million or more (fig. 2). One percent reported no business activity at all in 2023.



The median dollar volume associates reported for 2023 was a record high (\$3.0 million) in the 16-year history of this series. The median fluctuated between \$1.0 million and \$1.8 million from 2008 to 2013 (the period immediately following the onset of the Great Recession), then between \$2.0 million and \$2.6 million from 2014 to 2020, before jumping by 18% to \$2.86 million in 2021, remaining essentially unchanged in 2022 at \$2.84 million, and rising to \$3.0 million in 2023 (fig. 3).

**Figure 3. Median Annual Revenue: HISTORY**  
*(Millions of dollars)*

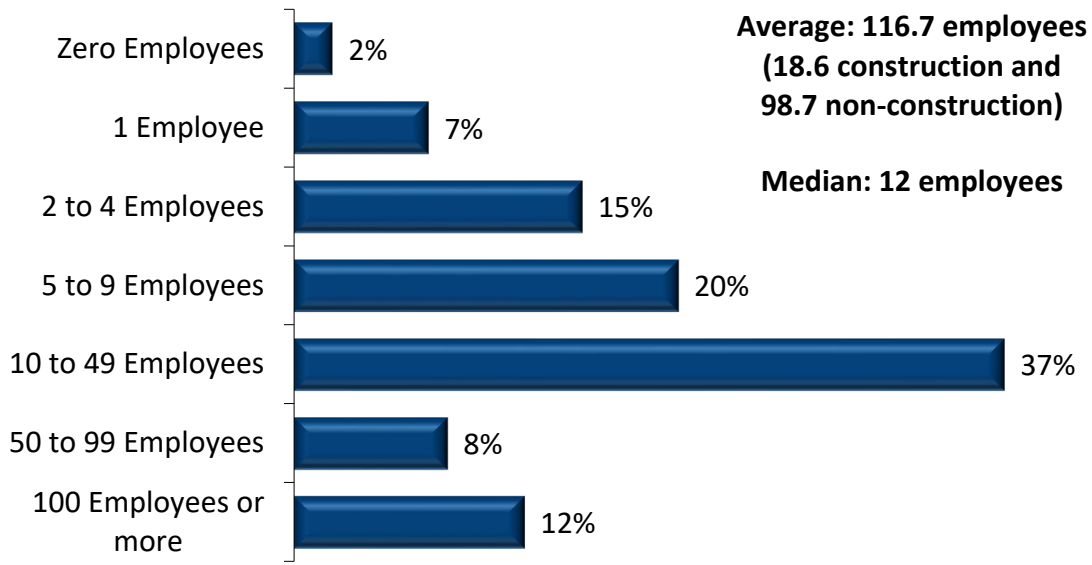


Median dollar volume of business varies considerably across primary activities. For example, associates in wholesale dealerships/distributorships reported a median of \$8.7 million in 2023 revenue, compared to \$1.2 million among professional specialty members, \$2.5 million among subcontractor/specialty trade contractors, \$2.6 million among those in 'other' associate activities, \$4.8 million among retail dealerships/distributorships, and \$7.3 million among wholesale financial services companies.

### **Associates Reported a Record High Number of Employees for the Second Consecutive Year**

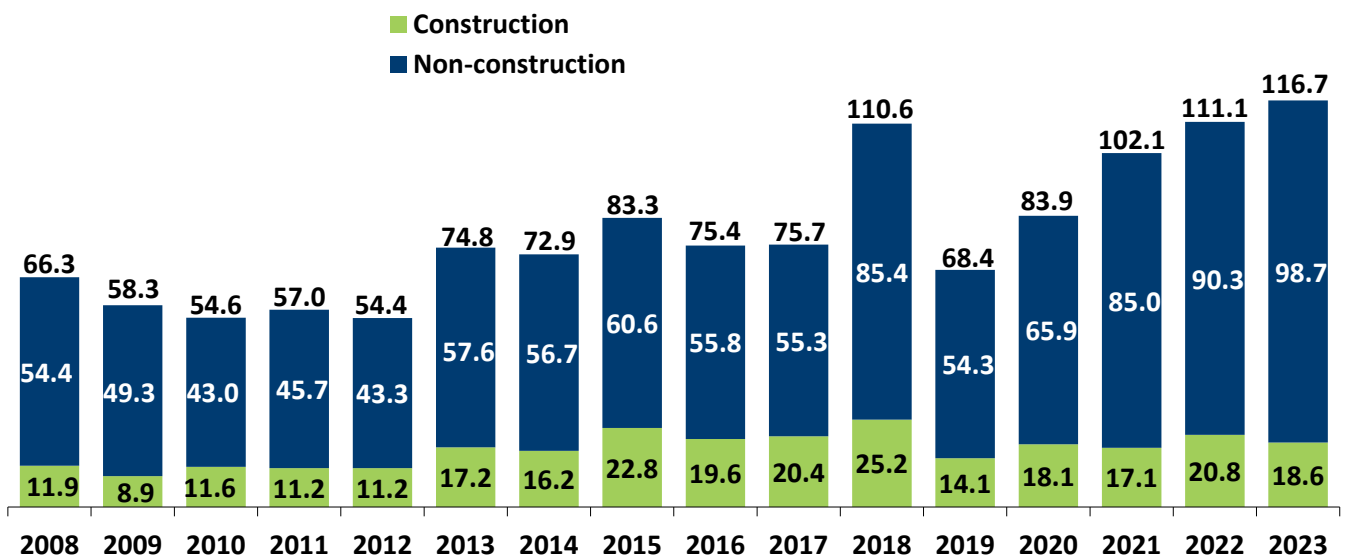
Associate members reported that their companies carried an average of 116.7 employees on their payrolls in 2023, of which 18.6 were construction employees and 98.7 were non-construction employees. The median number of employees on payroll was 12, which ties the all-time high set in 2022. While only 2% of associate members reported having no employees on payroll, 7% reported 1 employee, 15% reported 2 to 4 employees, 20% reported 5 to 9 employees, 37% reported 10 to 49, 8% reported 50 to 99, and 12% reported 100 or more employees on their payroll in 2023 (fig. 4).

**Figure 4. Number of Employees on Payroll: 2023  
(Percent of Respondents)**



The average 116.7 employees on associates' payrolls in 2023 is also the highest reading in the 16-year history of the series. In 2008, associates carried an average of 66.3 employees. For the next four years (2009 to 2012), the average dropped and ranged from 54 to 58 employees. The average then increased to 75 and hovered between 68 and 84 employees from 2013 to 2020, with an anomalous spike in 2018. Associates' average number of employees then increased by more than 21% to 102.1 in 2021, by another 8.8% to 111.1 in 2022, and an additional 5.0% to 116.7 in 2023, marking the third consecutive year where the average number of employees is over 100 (fig. 5).

**Figure 5. Average Number of Employees on Payroll: HISTORY**

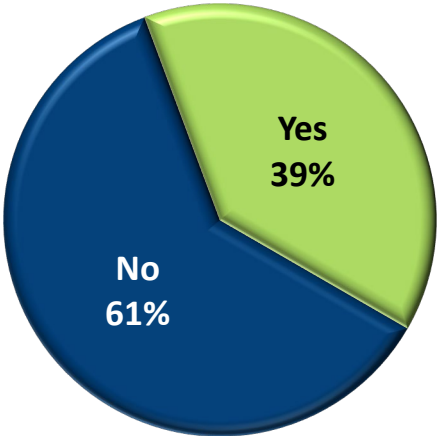


While the average number of employees has fluctuated substantially from year to year, the median has been relatively stable, ranging between 8 or 9 from 2008 to 2014 and 10 or 11 from 2015 to 2021 before rising to 12 in 2022 and remaining there in 2023, indicating that the average is skewed upwards by a relatively small number of associate members with very large payrolls. Because of this, the median may better represent the typical associate member’s business for many purposes.

**39% of Associates Contribute to the Development of Green/Sustainable Homes**

The NAHB census asked associate members if their companies contribute in any way to the development of green or sustainable homes. Thirty-nine percent of associates indicated that their companies contributed to green/sustainable homes in 2023, while the remaining 61% indicated that their companies did not (fig. 6).

**Figure 6. Does Your Company in Any Way Contribute to the Development of Green/Sustainable Homes?  
(Percent of Respondents)**

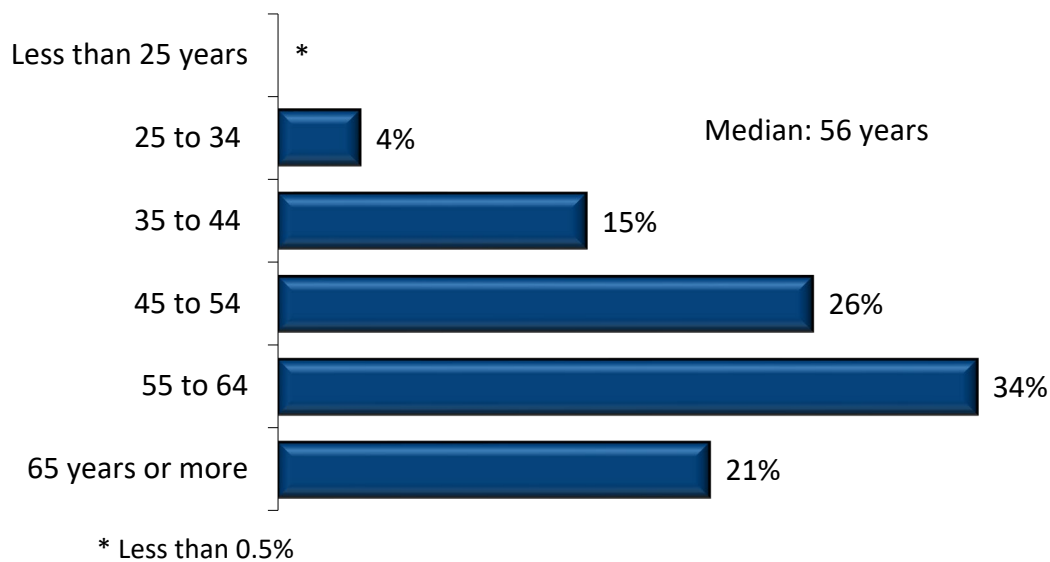


The share of associate members reporting that their companies contribute to the development of green/sustainable homes varies significantly by primary activity. For example, 65% of associates in wholesale dealerships/distributorships report their companies contribute, compared to only 20% in financial services and 34% in subcontracting/specialty trade contracting.

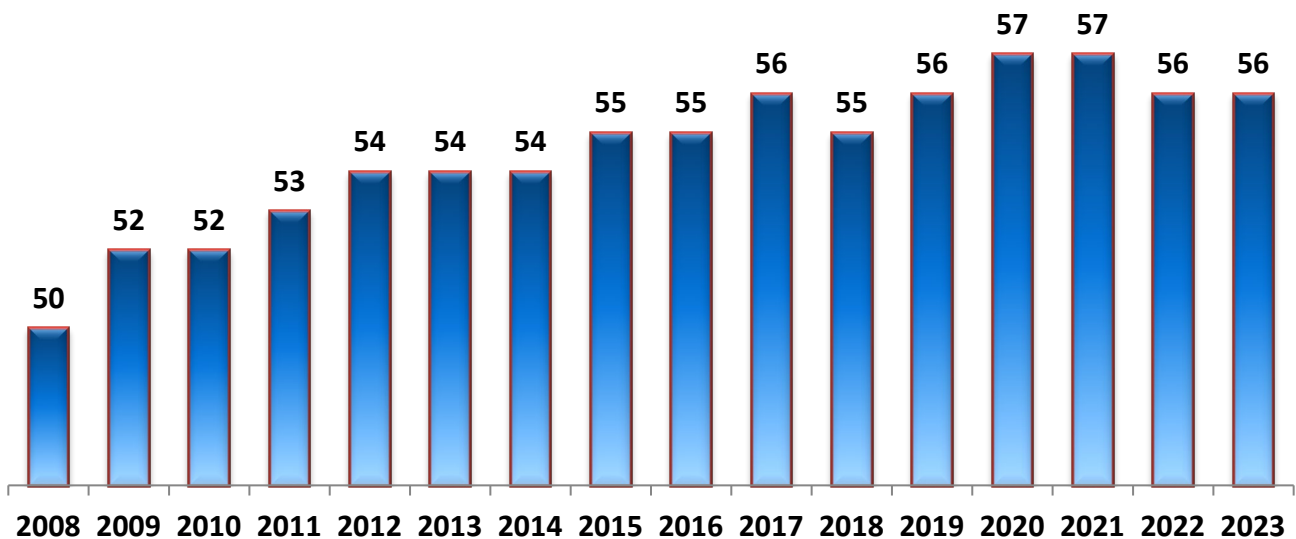
## Age, Gender, Race and Ethnicity

The median age of NAHB associate members in 2023 was 56 years. Four percent were under 35 years old, 15% were 35 to 44, 26% were 45 to 54, 34% (plurality) were 55 to 64, and 21% were 65 or older (fig. 7). Although the median age of NAHB's associate members has been relatively stable in recent years, it has generally tended to drift upward. The median age was 50 in 2008, 52 or 53 from 2009 to 2011, 54 from 2012 to 2014, 55 or 56 from 2015 to 2019, and 57 in 2020 and 2021 before falling back to 56 in 2022 and 2023 (fig. 8).

**Figure 7. Age of Associate Members: 2023**  
*(Percent of Respondents)*

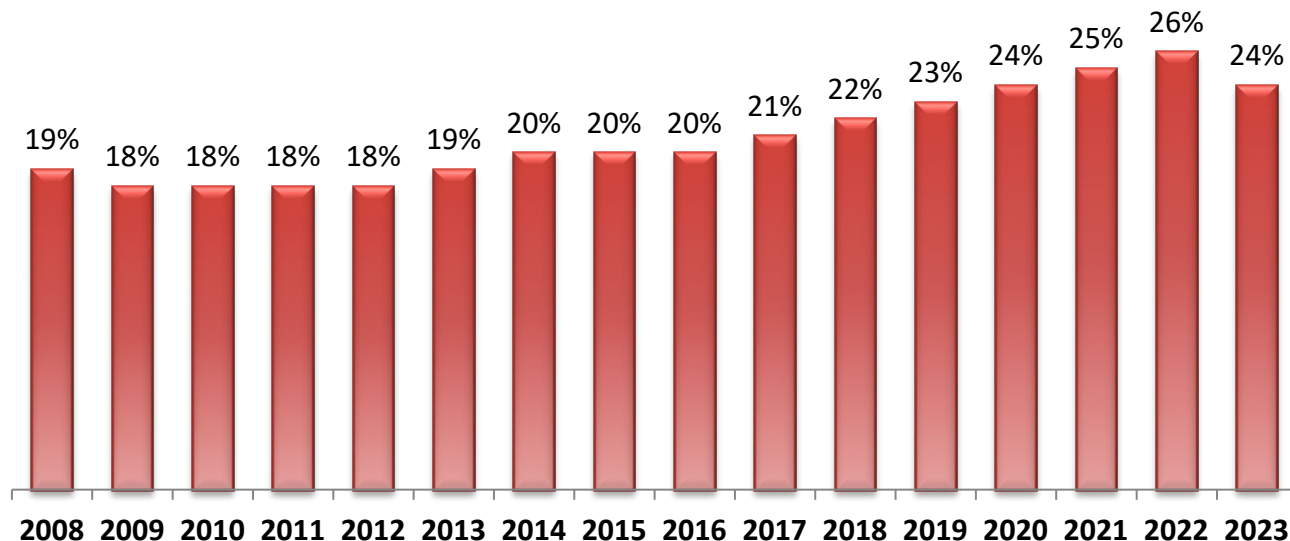


**Figure 8. Median Age of Associate Members: HISTORY**  
*(Percent of Respondents)*



Twenty-four percent of NAHB's associate members in the 2023 Member Census are women, falling from 26% in 2022 which was a series high. The female share stayed constant at 18% from 2009 through 2012, edged up to 19% in 2013, then to 20% from 2014 through 2016. From 2017 to 2022, it increased by one percentage point annually for six consecutive years to 26%, before decreasing two percentage points to 24% in 2023 (fig. 9).

**Figure 9. Female Share of Associate Members: HISTORY**  
*(Percent of Respondents)*



As has been true in the past, a majority of NAHB's associate members identify themselves as white. Ninety-four percent of associates indicated they were White, alone, compared to 1% each for Asian, alone; and Black or African-American, alone. There was less than 0.5% each for American Indian or Alaska Native, alone; and Pacific Islander, alone. Two percent of associates are of some other race and 1% are of two or more races. These racial categories follow the classification scheme implemented by the U.S. Census Bureau in the 2000 Census (after a long process of soliciting input from stakeholders). In terms of ethnicity, only 5% of associates identified themselves as being of Hispanic, Latino, or Spanish origin, which was the highest share since 2013 (when the question was added to the Census).

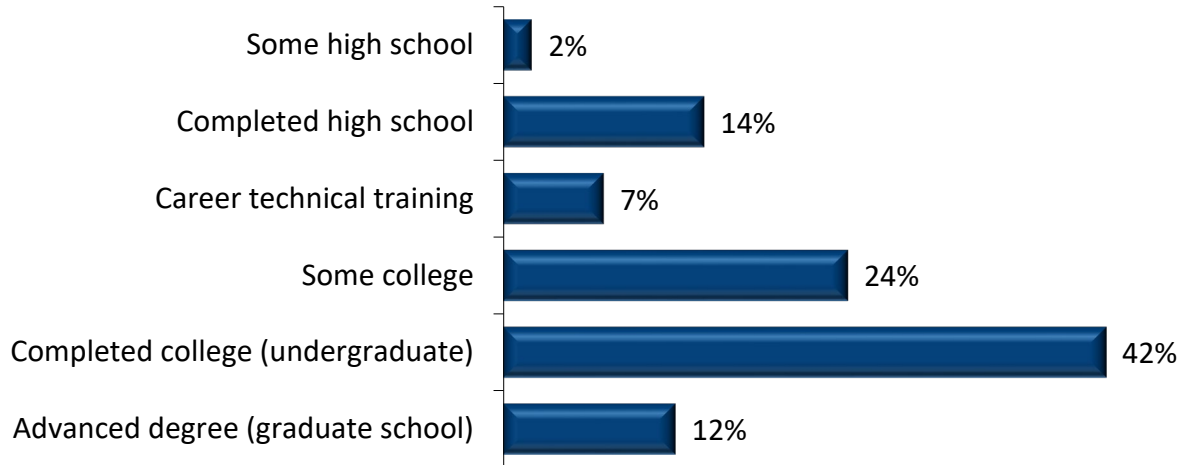
### **54% of Associate Members Have a Higher Education Degree**

Twelve percent of NAHB's associate members have an advanced degree (graduate school), while 42% (plurality) have completed college, 24% have some college education, 7%



have career technical training, 14% have completed high school, and 2% only have some high school education (fig. 10).

**Figure 10. Education Level of Associate Members: 2023**  
*(Percent of Respondents)*



The educational background of NAHB associate members has not changed significantly over time. Since the inception of the Census in 2008, half or more of associate members have reported having a higher-education degree (either undergraduate or graduate).

Following is a series of profiles: one for each of the major categories of NAHB's associate members.

**PROFILES BY MAJOR ASSOCIATE MEMBER TYPE**

**Subcontracting/Specialty Trade Contractors in 2023**

	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017
Number of members	49,382	44,351	42,070	34,574	30,974	32,160	28,802	32,441	33,795	31,639
	2018	2019	2020	2021	2022	2023				
	32,148	34,293	33,528	30,325	29,165	31,125				

**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, Window/Glass/Door installation, and Other Subcontracting.

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

Construction Employees:	<b>7</b>
Non-construction Employees:	<b>3</b>
Total:	<b>11</b>

*(6% have 50 to 99 employees and 5% have 100 employees or more.)*

**3. Dollar volume of company’s business activity (Median):** **\$2.5 million**  
*(7% had \$15 million or more in business activity.)*

**4. Share of dollar volume derived from residential construction (Median):** **62%**

**5. Contribute to the development of green/sustainable homes:** **34%**

**Member Profile**

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

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

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

**4. Race/Ethnicity:** White: 95%      Hispanic: 6%

**5. Education:** 37% have college/advanced degree  
26% have some college education

### Professional Specialty Members in 2023

	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017
Number of members	18,242	19,609	12,652	10,789	10,754	10,502	10,744	10,265	10,261	9,512
	2018	2019	2020	2021	2022	2023				
	10,286	10,212	9,097	8,639	9,105	7,598				

#### 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 (Median):**

Construction Employees: **0**

Non-construction Employees: **7**

Total: **7**

*(8% have 50 to 99 employees and 12% have 100 employees or more.)*

**3. Dollar volume of company's business activity (Median):** **\$1.2 million**

*(13% had \$15 million or more in business activity.)*

**4. Share of dollar volume derived from residential construction (Median):** **44%**

**5. Contribute to the development of green/sustainable homes:** **46%**

#### Member Profile

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

**2. Age (Median):** **57 years**

**3. Gender:** **Male: 69%** **Female: 31%**

**4. Race/Ethnicity:** **White: 95%** **Hispanic: 3%**

**5. Education:** **78% have college/advanced degree**  
**15% have some college education**

### Retail Dealership/Distributors in 2023

Number of members	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017
	18,776	13,009	11,014	9,182	8,939	9,090	8,719	9,782	8,790	8,308
	2018	2019	2020	2021	2022	2023				
	8,721	8,485	8,160	7,092	6,706	6,788				

#### 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 (*Median*):**

Construction Employees: **0**

Non-construction Employees: **10**

Total: **14**

*(10% have 50 to 99 employees and 14% have 100 employees or more.)*

**3. Dollar volume of company's business activity (*Median*):** **\$4.8 million**  
*(27% had \$15 million or more in business activity.)*

**4. Share of dollar volume derived from residential construction (*Median*):** **62%**

**5. Contribute to the development of green/sustainable homes:** **48%**

#### Member Profile

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

**2. Age (*Median*):** **57 years**

**3. Gender:** **Male: 74%** **Female: 26%**

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

**5. Education:** **53% have college/advanced degree**  
**28% have some college education**

**Financial Services Members in 2023**

Number of members	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017
	11,974	11,197	8,340	6,492	7,508	8,426	8,710	8,492	7,714	7,180
	2018	2019	2020	2021	2022	2023				
	7,941	6,402	5,887	6,475	6,751	5,883				

**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 (Median):**

Construction Employees: **0**

Non-construction Employees: **30**

Total: **31**

*(9% have 50 to 99 employees and 34% have 100 employees or more.)*

**3. Dollar volume of company’s business activity (Median):** **\$7.3 million**  
*(34% had \$15 million or more in business activity.)*

**4. Share of dollar volume derived from residential construction (Median):** **NA**

**5. Contribute to the development of green/sustainable homes:** **20%**

**Member Profile**

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

**2. Age (Median):** **58 years**

**3. Gender:** **Male: 69%** **Female: 31%**

**4. Race/Ethnicity:** **White: 94%** **Hispanic: 3%**

**5. Education:** **75% have college/advanced degree**  
**22% have some college education**

### Wholesale Dealerships/Distributors in 2023

Number of members	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017
	5,676	6,734	5,453	4,300	4,759	4,384	4,644	4,466	3,889	3,685
	2018	2019	2020	2021	2022	2023				
	3,828	3,467	4,298	3,908	3,511	3,785				

#### 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 (*Median*):**

Construction Employees: **0**

Non-construction Employees: **13**

Total: **17**

*(13% have 50 to 99 employees and 20% have 100 employees or more.)*

**3. Dollar volume of company's business activity (*Median*):** **\$8.7 million**

*(40% had \$15 million or more in business activity.)*

**4. Share of dollar volume derived from residential construction (*Median*):** **55%**

**5. Contribute to the development of green/sustainable homes:** **65%**

#### Member Profile

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

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

**3. Gender:** **Male: 80%** **Female: 20%**

**4. Race/Ethnicity:** **White: 92%** **Hispanic: 4%**

**5. Education:** **58% have college/advanced degree**  
**29% have some college education**

### Other Associate Activity Members in 2023

Number of members	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017
	40,153	16,980	18,353	14,410	17,240	18,011	19,054	15,591	16,115	16,295
	2018	2019	2020	2021	2022	2023				
	16,146	16,290	13,103	12,805	12,766	11,719				

#### 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 (Median):**

Construction Employees: **0**

Non-construction Employees: **6**

Total: **10**

*(7% have 50 to 99 employees and 16% have 100 employees or more.)*

**3. Dollar volume of company's business activity (Median):** **\$2.6 million**  
*(18% had \$15 million or more in business activity.)*

**4. Share of dollar volume derived from residential construction (Median):** **27%**

**5. Contribute to the development of green/sustainable homes:** **41%**

#### Member Profile

**1. No. of years as a member of NAHB (Median):** **6 years**

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

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

**4. Race/Ethnicity:** White: 90%      Hispanic: 5%

**5. Education:** 67% have college/advanced degree  
20% have some college education