



2020 EXCAVATOR SURVEY RESULTS

1,084 Excavators responded to this survey



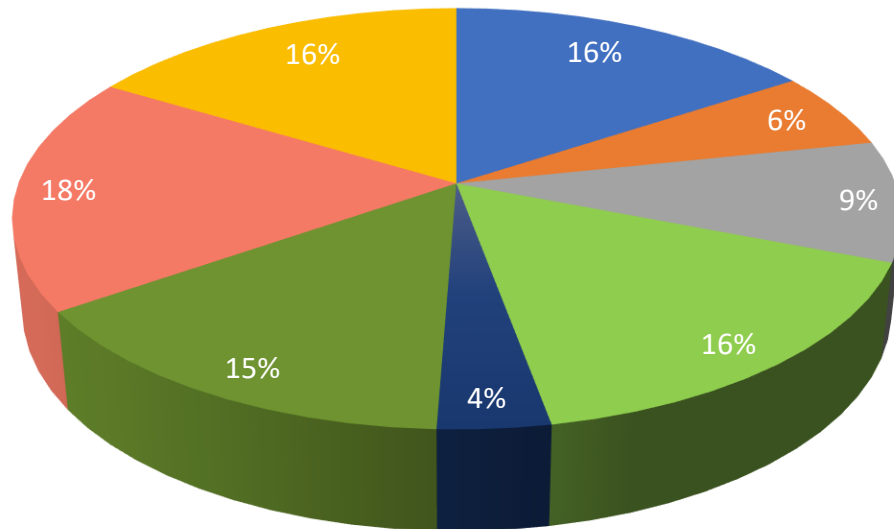


In December 2020, Ontario One Call conducted an online survey of over 1,000 excavators. The following report outlines the results.

Among the key findings:

1. Excavators plan to make 2021 a busy year for digging. Half expect excavation volumes will be above pre-pandemic levels (e.g., 2019 levels) while the other half feel they will return to normal. Only 7% feel they will be slower than usual. This means that anyone who is planning based on the slower, COVID-impacted 2020 year will likely be underestimating demand for locates.
2. Roughly 3/4 of excavators say that it's easy to use ON1Call's online platform and that they have adequate training to use the system. ON1Call recently introduced the Professional Locate Administrator Course (PLAC) to provide the opportunity to become an expert in entering and managing tickets.
3. Around 2/3 of excavators say we're on the right track in improving our online experience. In late 2021/early 2022 we'll be rolling out a new web platform that will be much more intuitive and easier to use.
4. There is strong support for concepts like "One Call, One Locate", a standardized 60 day locate validity period and sharing locates among contractors
5. There are mixed views toward excavator-pay models and mandatory white lining, but certainly enough support to investigate these ideas further

What is the primary type of work your company does?

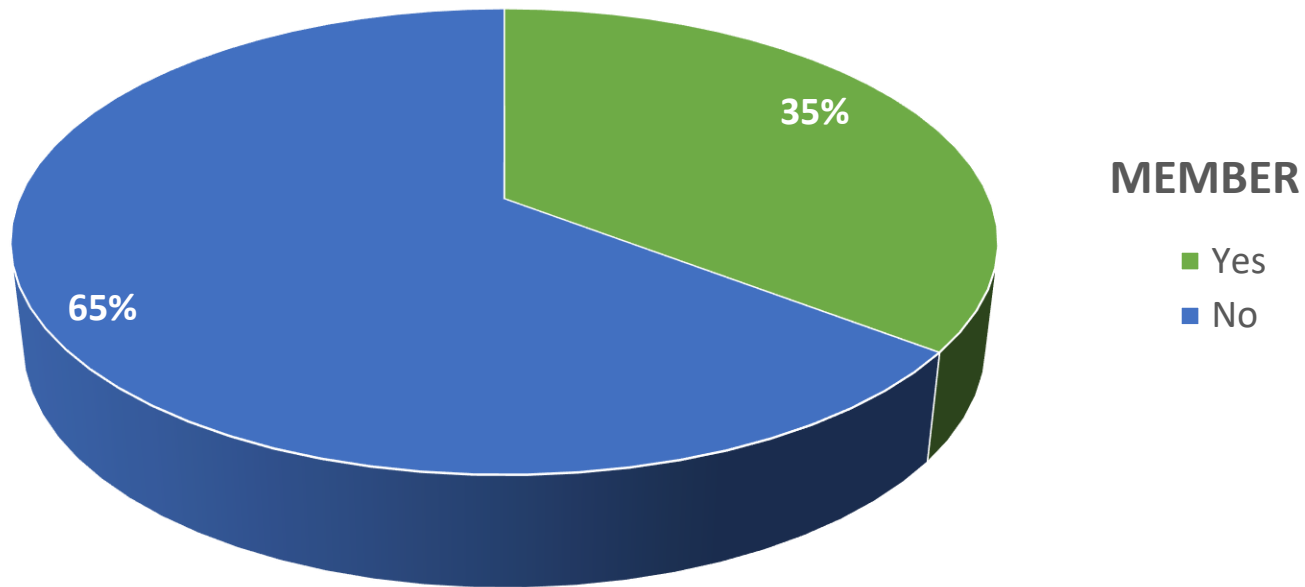


TYPE OF WORK

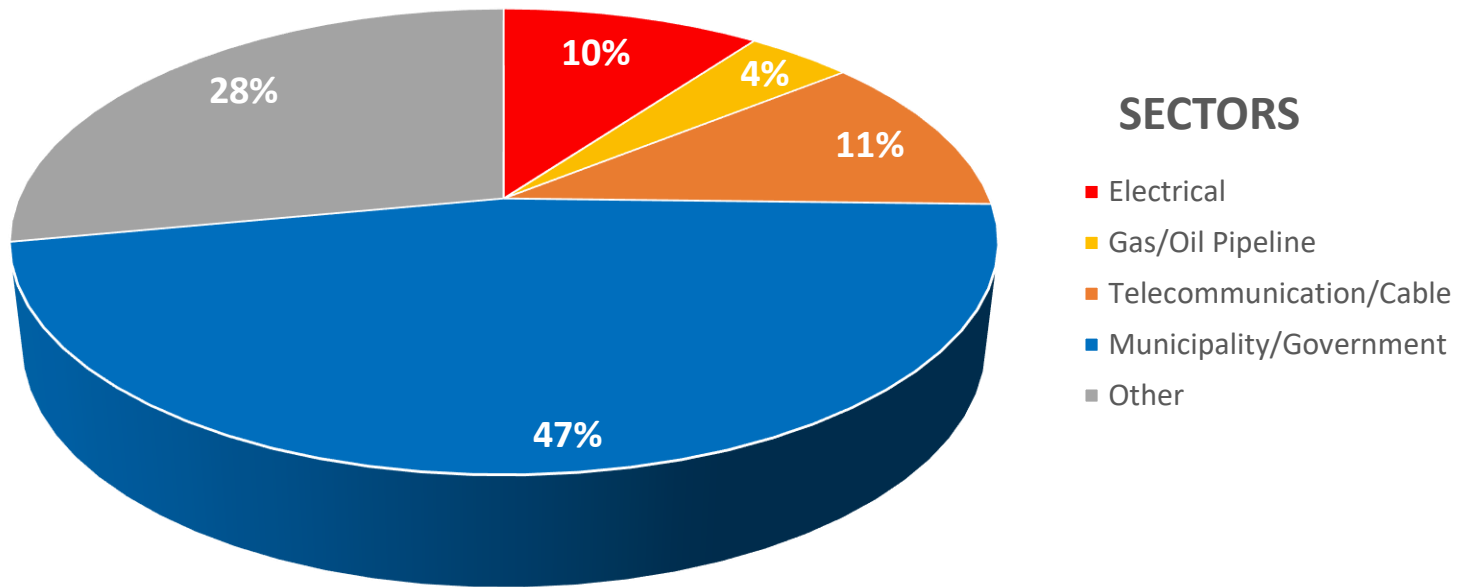
- Sewer/Water Construction
- Engineering/Design
- Street & Road Construction
- Residential and/or Commercial Building Construction/Demolition
- Commercial/Industrial Building Construction/Demolition
- Green Construction (Fencing/Landscaping/Forestry/Irrigation)
- Utility Installation/Repair
- Other



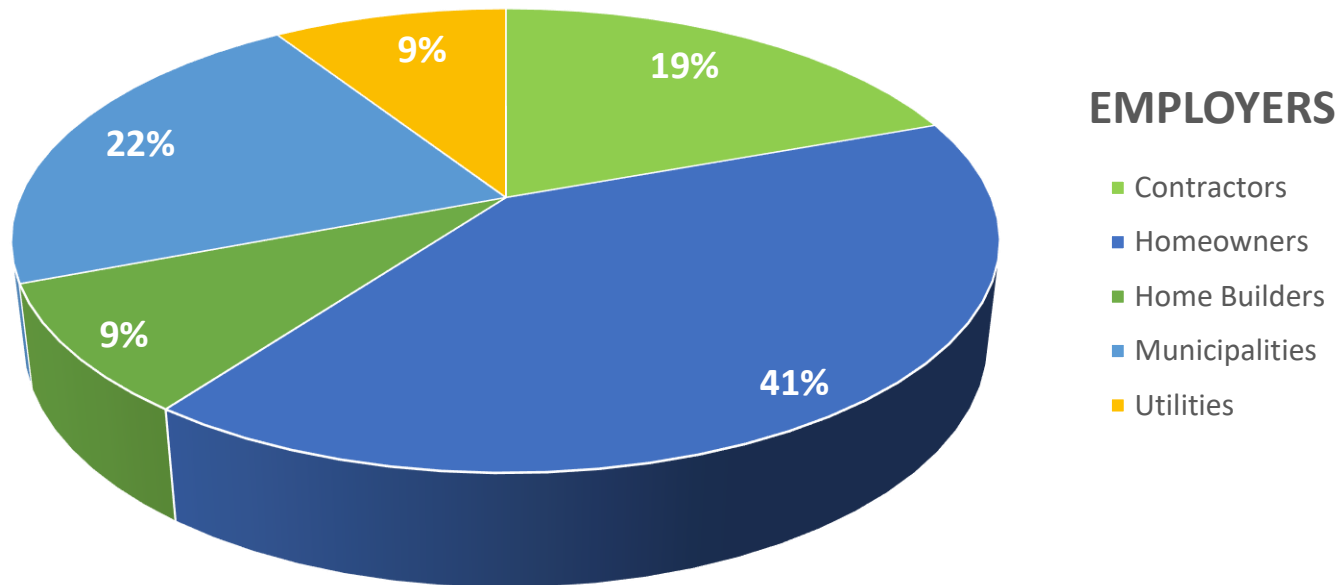
Is your organization a member of Ontario One Call (e.g. does it own buried infrastructure)?



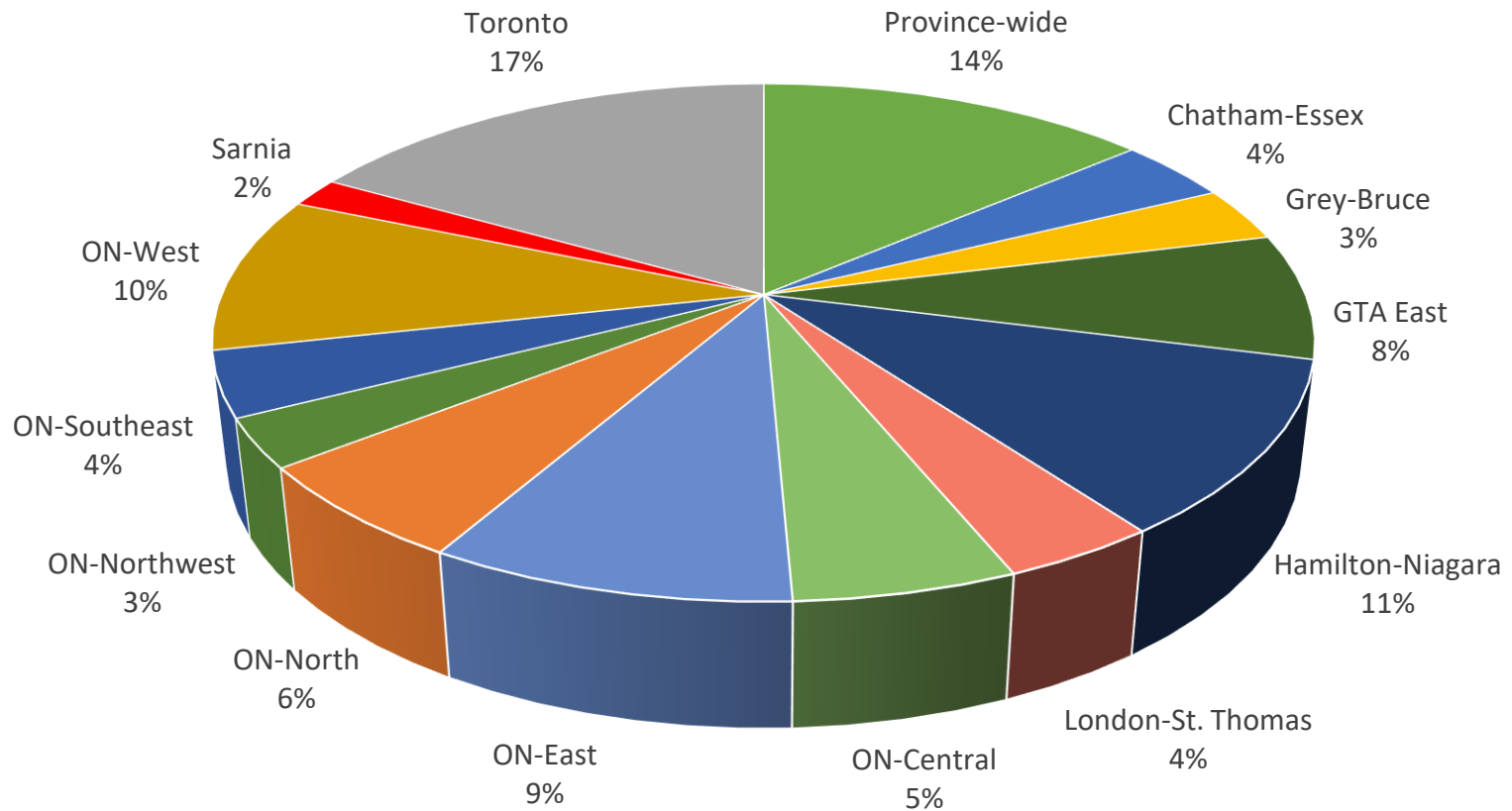
(Members): If you are a member, what type of organization do you work for?



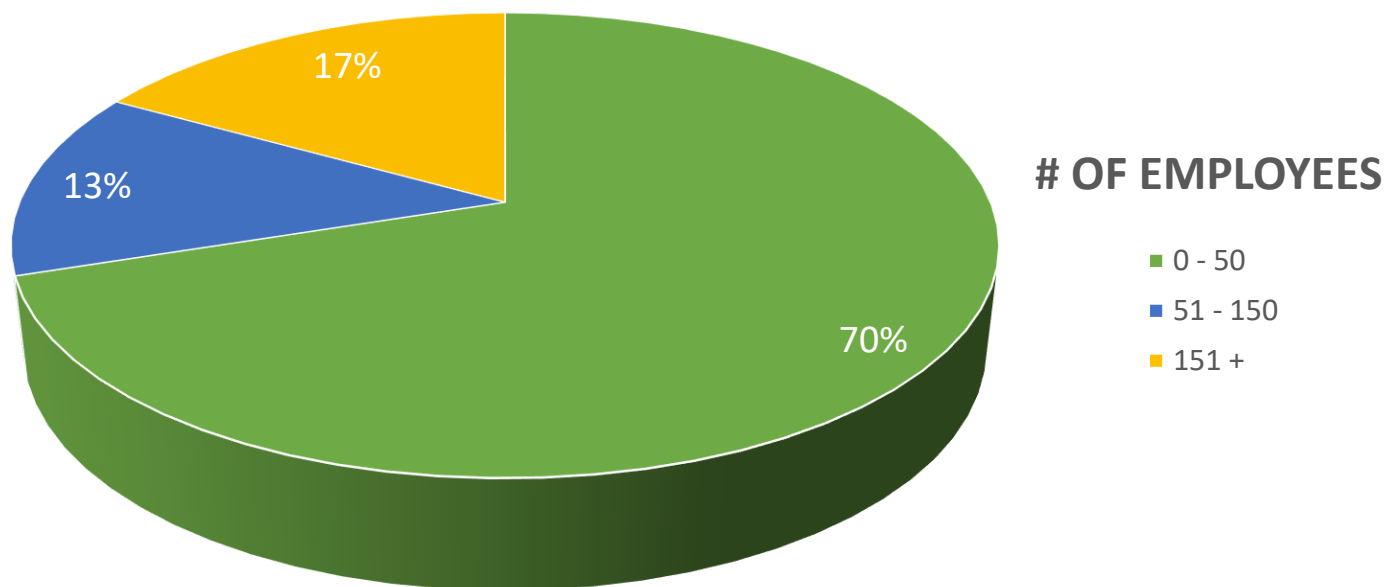
(Non-Members): Who typically employs your organization?



Where in Ontario does your organization do most of its work?



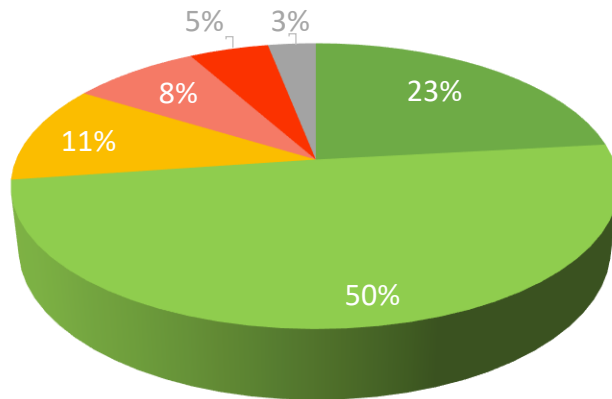
How many employees does your organization have?



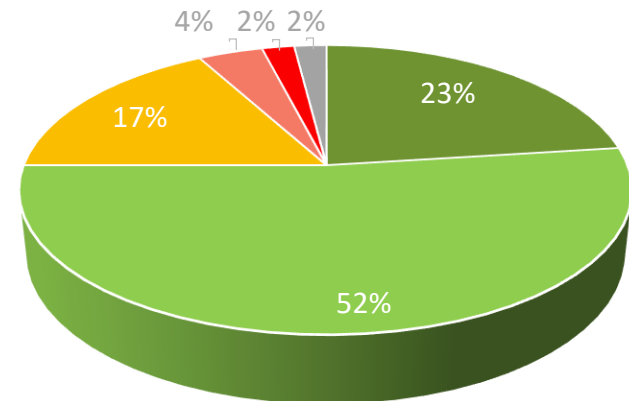


Working with Ontario One Call

It is easy to enter locate requests into Ontario one call via the web ticket.



I feel like my organization has adequate training to effectively use the Ontario One Call system

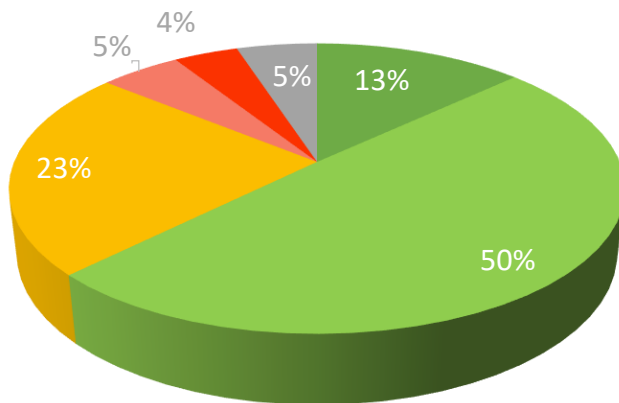


■ Strongly Agree ■ Agree ■ Neutral ■ Disagree ■ Strongly Disagree ■ No Opinion

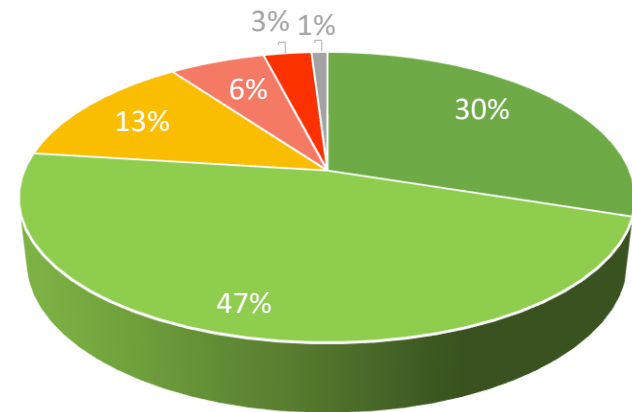


Working with Ontario One Call

When thinking of some of the major changes made to its online platform, Ontario One Call is on the right track in improving the quality of its service.



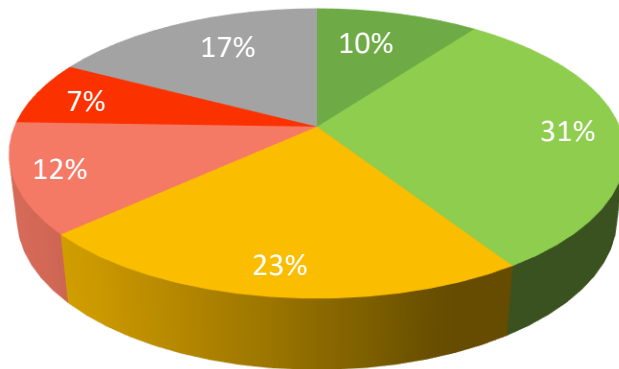
I consider Ontario One Call a valued partner in completing excavation work in a safe and timely manner.



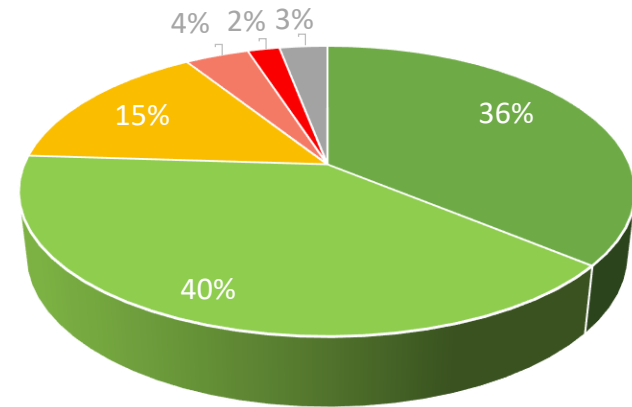
■ Strongly Agree ■ Agree ■ Neutral ■ Disagree ■ Strongly Disagree ■ No Opinion

Opportunity Areas

The timely delivery of locates is better today than it was before the one call legislation became law in 2012.



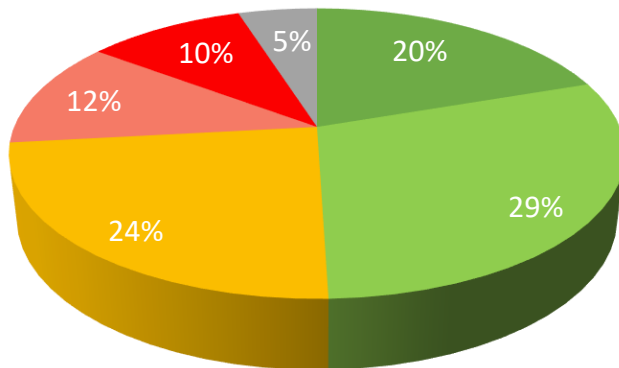
A one-call, one-locate process (meaning a single person completes all locates on behalf of members notified on a ticket) would greatly improve the timely delivery of locates.



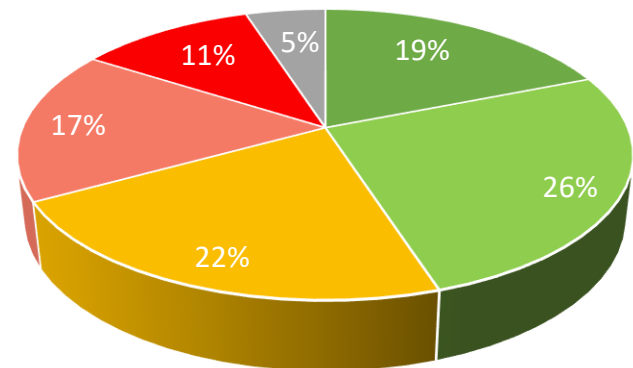
■ Strongly Agree
 ■ Agree
 ■ Neutral
 ■ Disagree
 ■ Strongly Disagree
 ■ No Opinion

Opportunity Areas

I think excavators should have the opportunity to pay external locators (who are qualified by members and carry proper insurance) to complete locates based on the excavator's schedule and needs.



I think excavators should be allowed to have their own staff provide locates, as long as they are properly trained and certified by members.

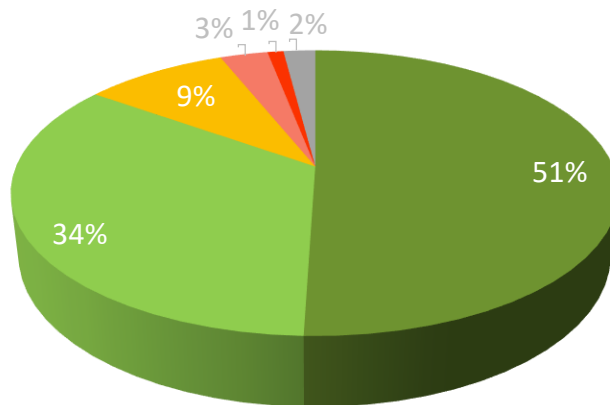


■ Strongly Agree ■ Agree ■ Neutral ■ Disagree ■ Strongly Disagree ■ No Opinion

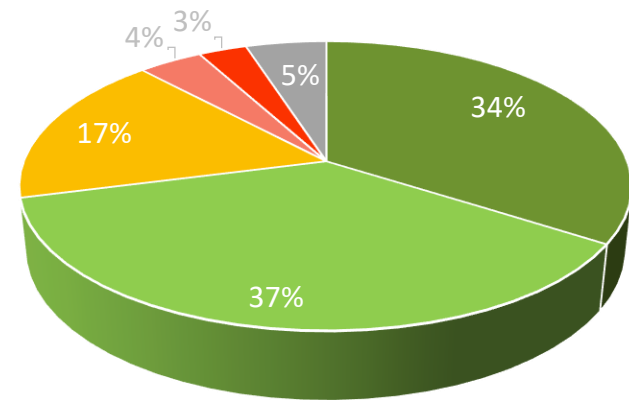


Opportunity Areas

A standardized locate validity period of 60 days would greatly improve locate delivery performance.



If more excavators shared locates with their subcontractors it would greatly improve locate delivery performance.

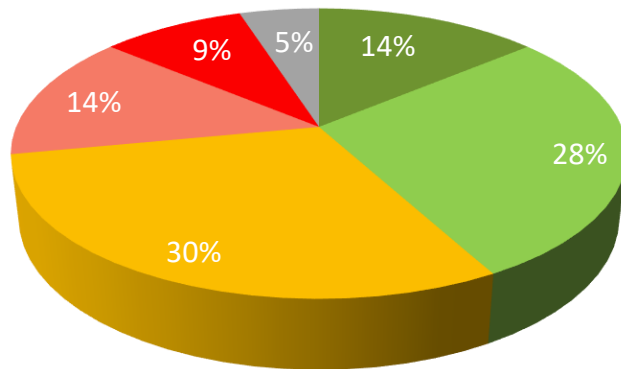


■ Strongly Agree ■ Agree ■ Neutral ■ Disagree ■ Strongly Disagree ■ No Opinion



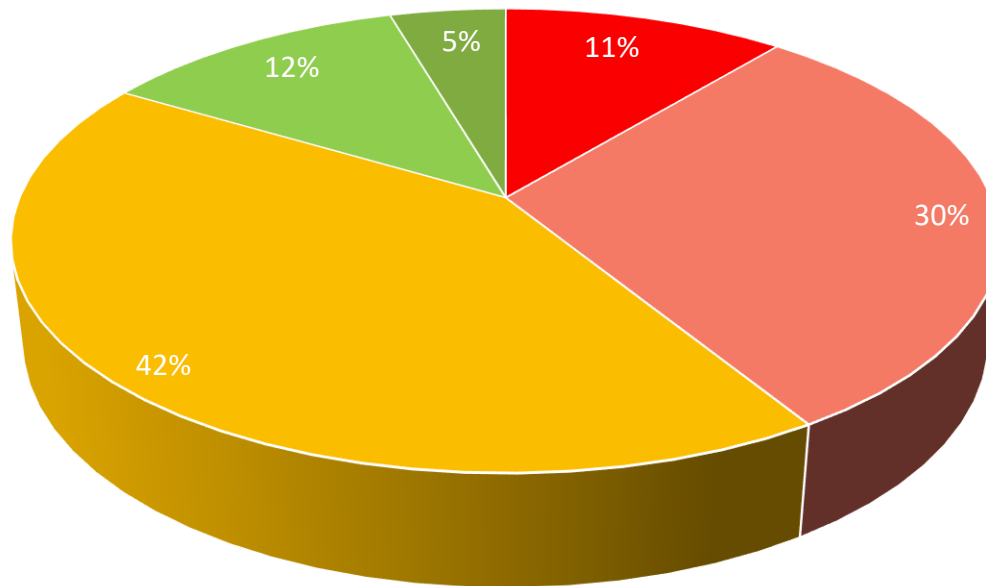
Opportunity Areas

White lining of projects (requiring excavators to pre-mark the excavation area with white paint) would improve safety and the quality of locates.



■ Strongly Agree ■ Agree ■ Neutral ■ Disagree ■ Strongly Disagree ■ No Opinion

How much of an impact did COVID-19 have on the amount of excavation work you originally planned for 2020?



COVID-19 IMPACT

- Significantly Less
- Somewhat Less
- As Planned
- Somewhat More
- Significantly More

When you think about your own organization, what are your expectations for 2021 excavation volumes?

