



2022 EXCAVATOR SURVEY RESULTS

1,088 Excavators responded to this survey

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PROJECT



In February 2022, Ontario One Call conducted an online survey of over 1,000 Excavators. The following report outlines the results.

Among the key findings:

1. Excavators are saying that 2022 will be a busy year. Last year, 50% of respondents indicated that they would have more work, and locate volumes went up almost 10%. In this year's survey, 60% of respondents are saying they will have more work, so stakeholders should expect strong demand for locate services.
2. There is support for Dedicated and Self Locator options. Roughly 3/4 of Excavators either agree, or are neutral, with paying for Dedicated Locators and 3/5 of Excavators agree, or are neutral, about having the ability to Self-Locate their projects if their staff are properly trained and certified.
3. Excavators strongly support (83%) a standardized 60 day locate validity period, and over 2/3 of Excavators feel that sharing locates with their subcontractors would greatly improve locate delivery performance.
4. There are mixed views that mandatory white lining (requiring Excavators to pre-mark the excavation area with white paint), and Excavators needing to share detailed information about future projects in advance (3-6 months) would improve the timely delivery and quality of locates.



Comparison between the previous Excavator survey

The following compares the 2022 Survey (conducted in Jan-Feb, 2022) to last years survey (conducted in Dec, 2020).

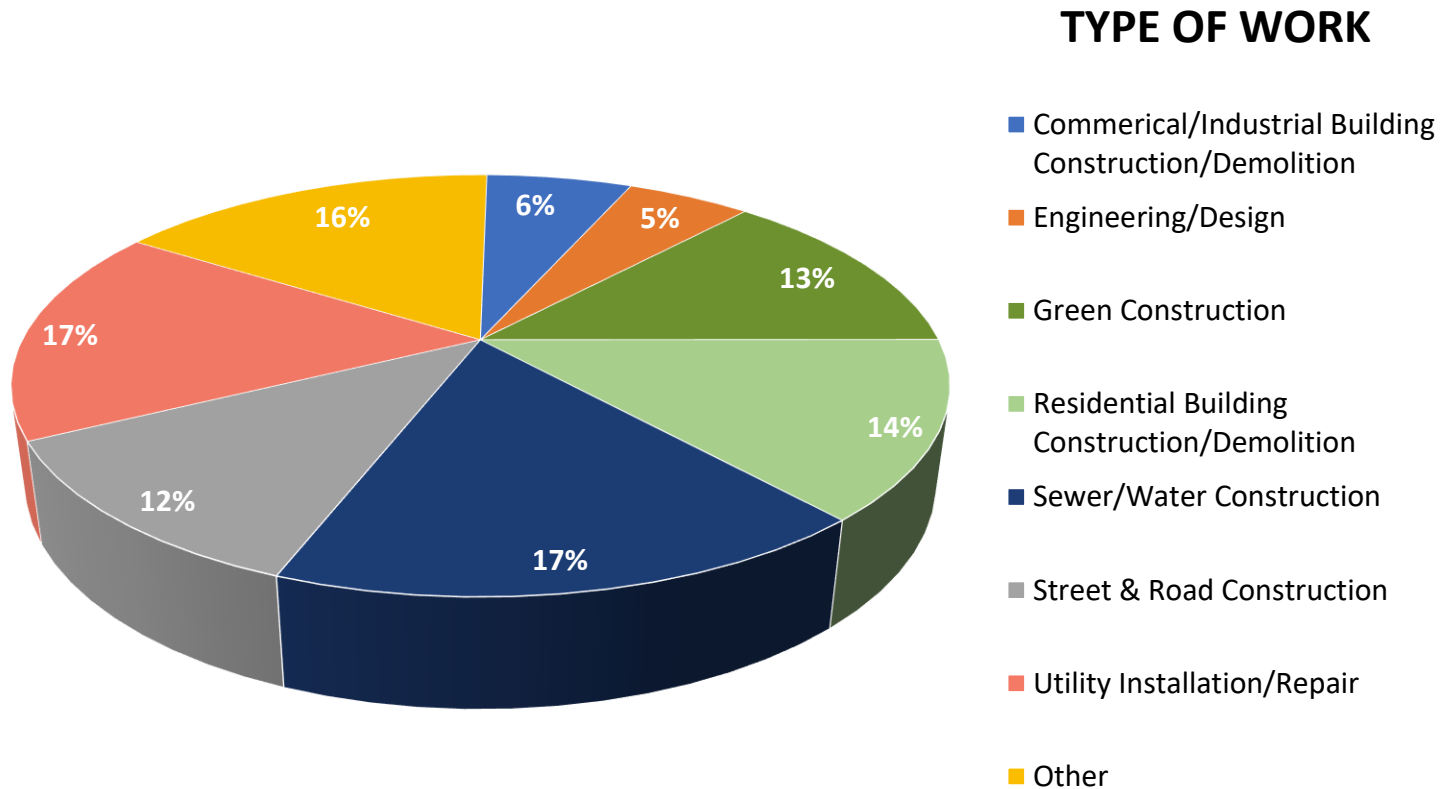
Among the key findings:

1. There was an almost identical representation (Sector, Employer, Geographical, and Company Size) and amount of respondents between the two surveys.
2. When asked if locates were better today vs before legislation, there was a significant increase in Excavators that believed timely delivery of locates was worse in the 2022 survey (43%) vs the previous year (19%). This increase coincides with the increase of formal complaints concerning late locates against Members. The number of complaints generated for late locates in 2021 was the highest ever recorded.
3. There continues to be strong support for the sharing of locates and having a standardized 60 day validity period.
4. Like the previous survey, there is support for having Excavators pay for dedicated and self-locators as a way to have more control over locate delivery. Almost half of the respondents, from both surveys, fully support the models, and an additional quarter had neutral feelings.
5. More Excavators believe that they will have more work in 2022 than Excavators did in 2021.

To see the previous years survey results [click here](#).

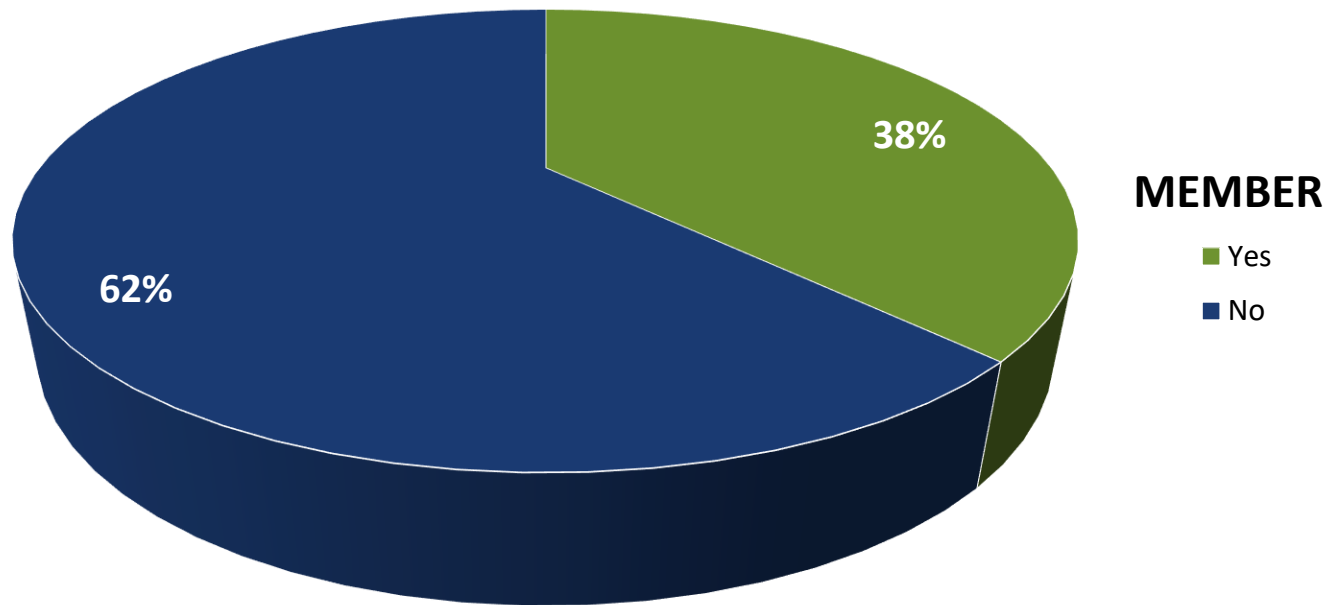


What is the primary type of work your company does?



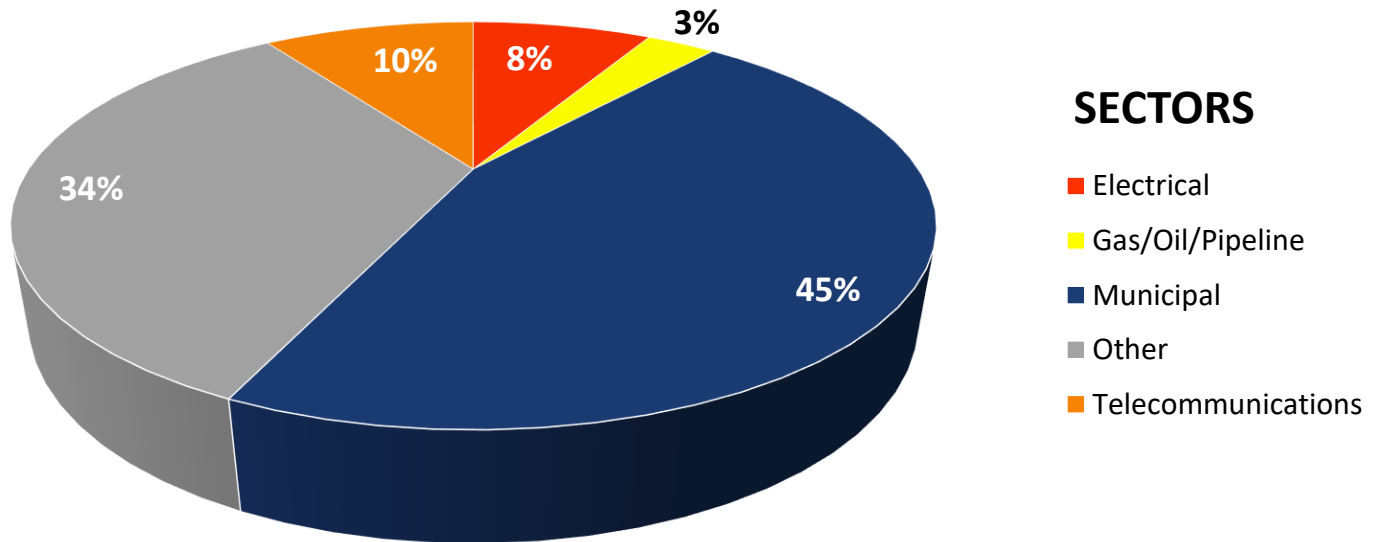


Is your organization a Member of Ontario One Call (i.e. does it own buried infrastructure)?

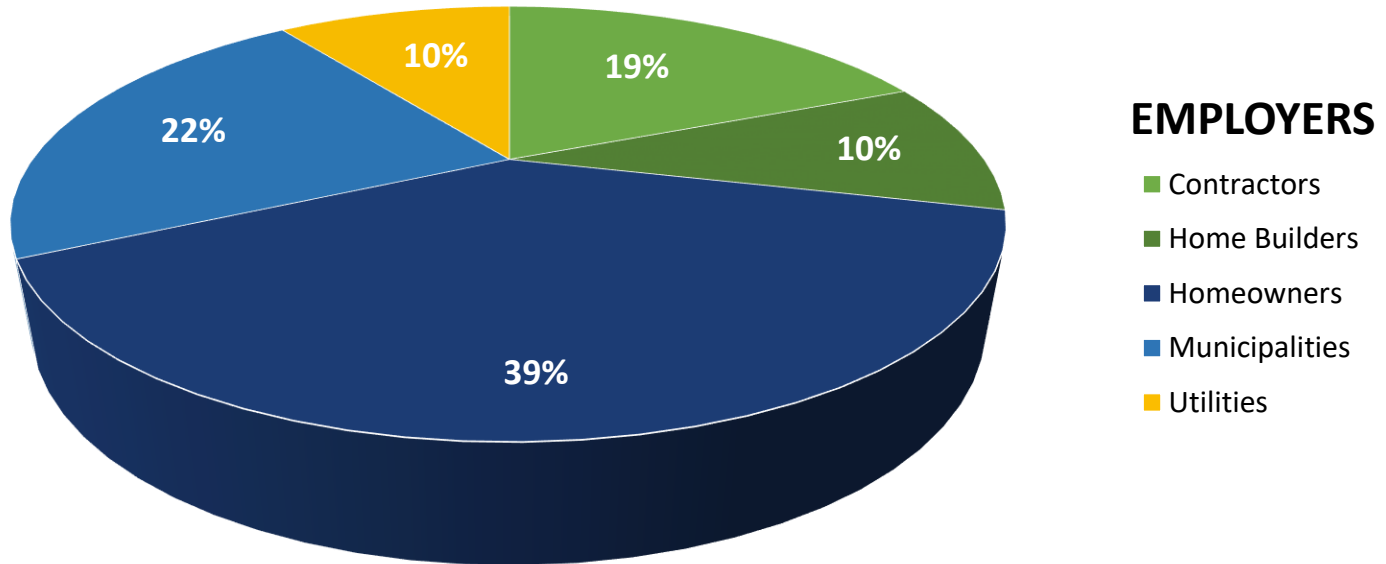




(Members): If you are a Member, what type of organization do you work for?

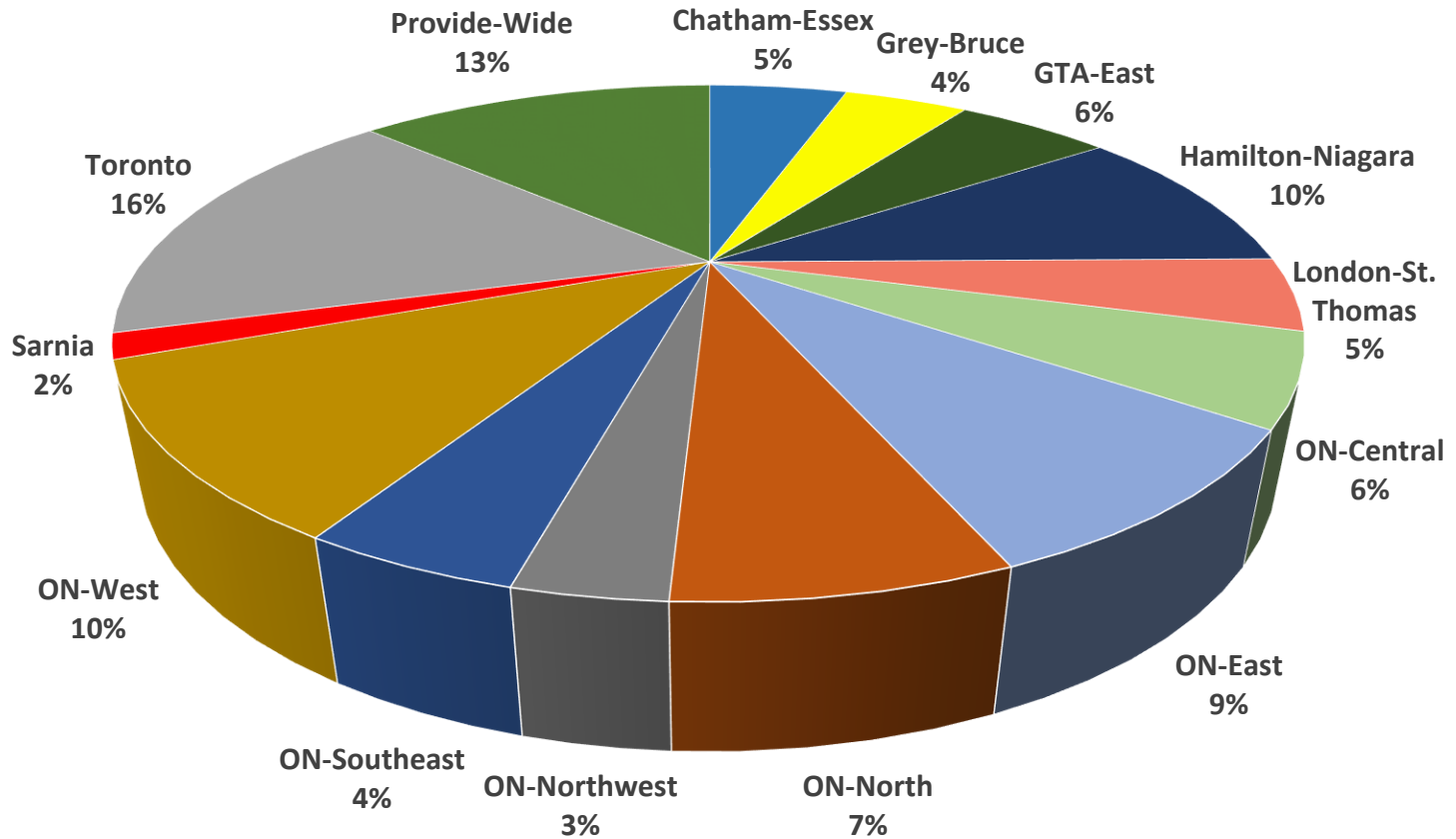


(Non-Members): Who typically employs your organization?



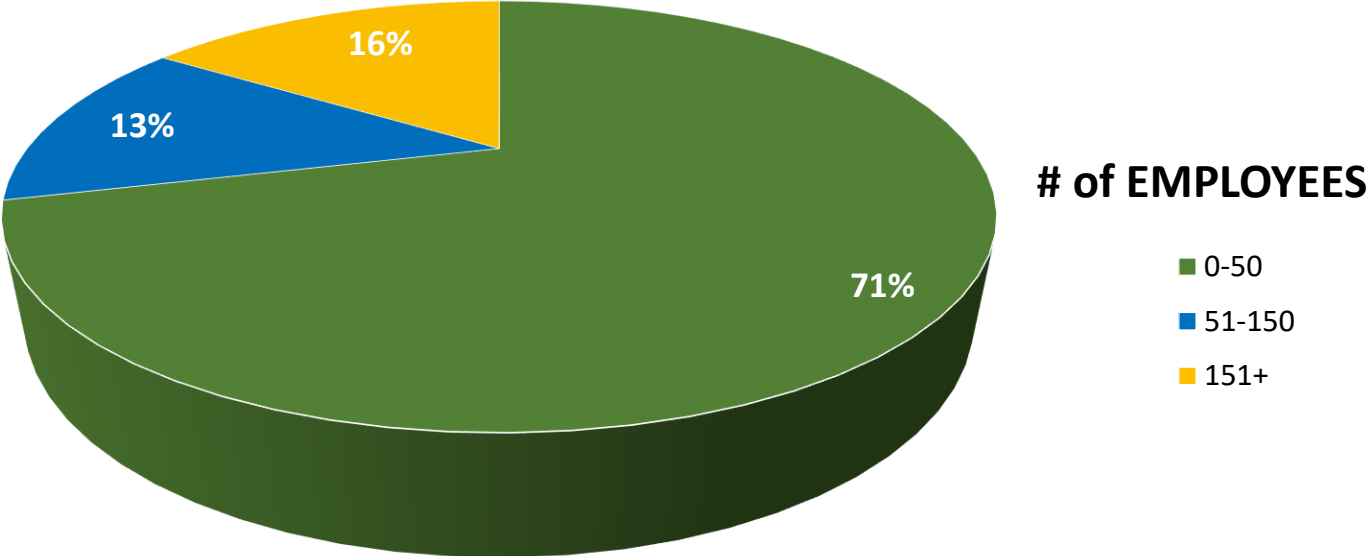


Where in Ontario does your organization do most of its work?





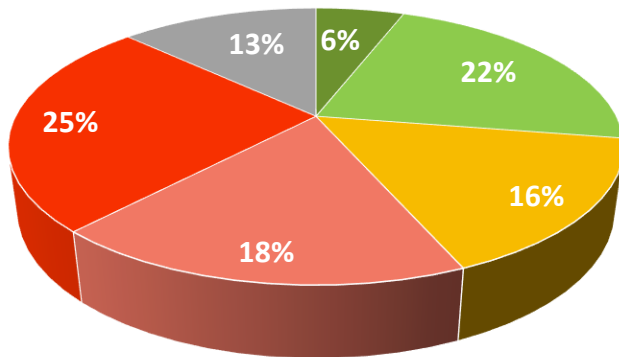
How many employees does your organization have?



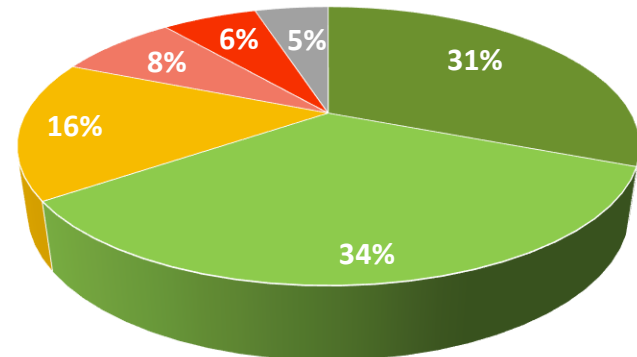


Areas of Opportunity

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.

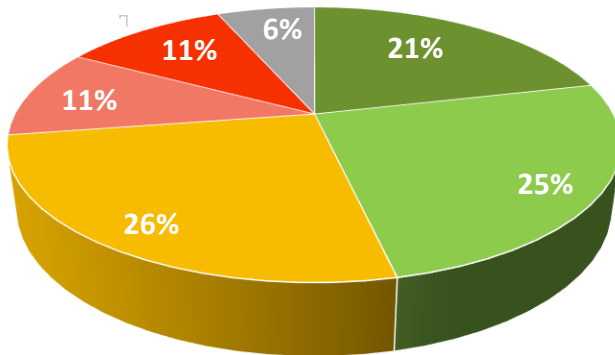


■ Strongly Agree ■ Agree ■ Neutral ■ Disagree ■ Strongly Disagree ■ No Opinion

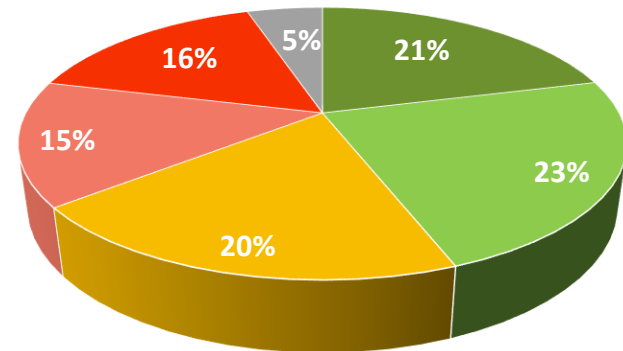


Areas of Opportunity

I think Excavators should have the opportunity to pay for Dedicated 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 Self Locate, have their own staff provide locates, as long as they are properly trained and certified by Members.

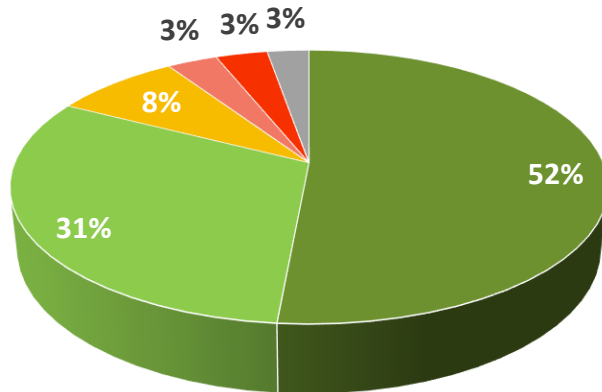


■ Strongly Agree ■ Agree ■ Neutral ■ Disagree ■ Strongly Disagree ■ No Opinion

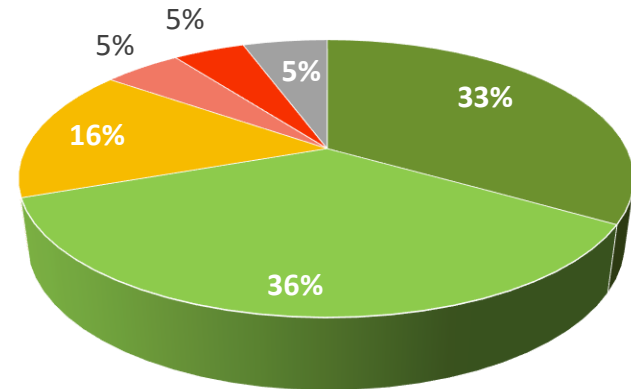


Areas of Opportunity

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.



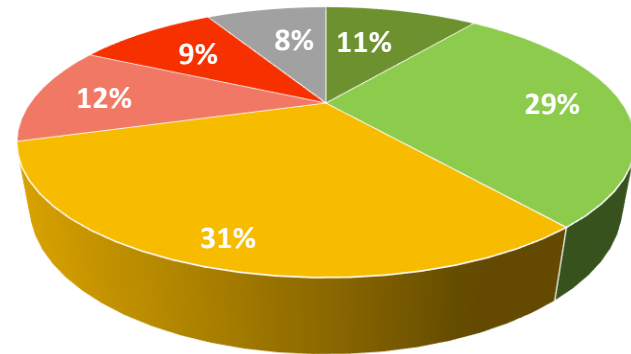
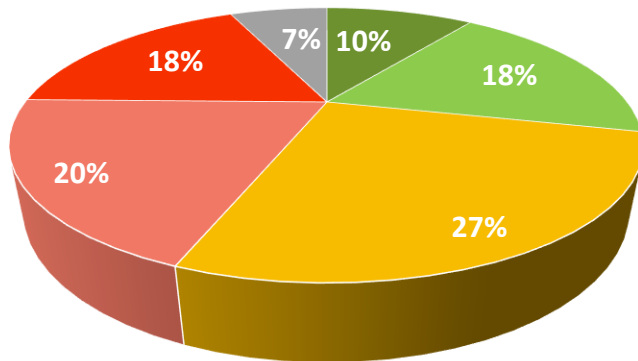
■ Strongly Agree ■ Agree ■ Neutral ■ Disagree ■ Strongly Disagree ■ No Opinion



Areas of Opportunity

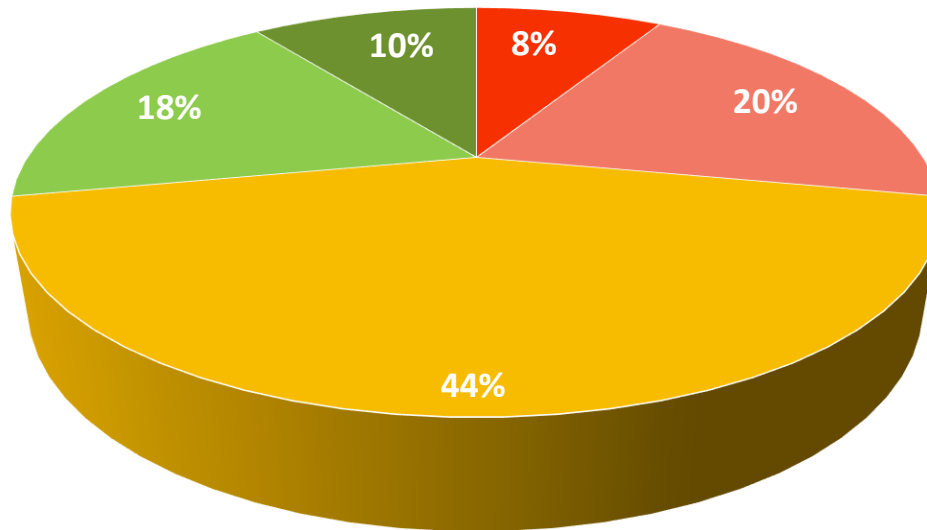
Mandatory white lining (requiring Excavators to pre-mark the excavation area with white paint) would improve timely delivery and the quality of locates.

Excavators sharing detailed information about future projects in advance (3-6 months) with Ontario One Call, for Members to forecast accordingly, would greatly improve the timely delivery 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 in 2021?



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 2022 excavation volumes?

2022 VOLUME EXPECTATIONS

