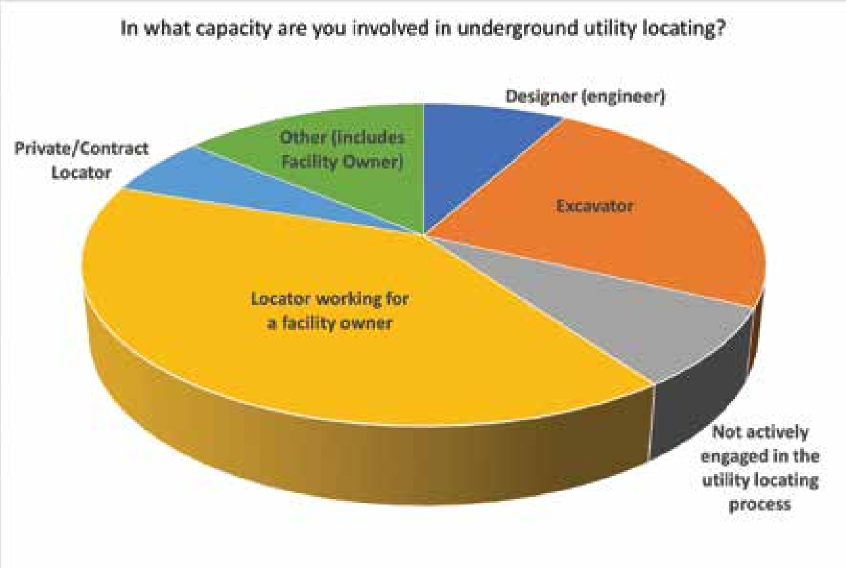
Locate Research Survey Results

In what capacity are you involved in underground utility locating?

46% of survey respondents identified as Locators with 13% indicating they were private locators. 24% of respondents identified as Excavators. The other 30% were represented by Designers (Engineers) (8%), Facility Owners (6%), Other (8%), and 8% who identified as not being actively involved in the utility locating process.



How much education should a locate technician have?

60% of respondents believe a broad-based locator certification program including both classroom and field testing is necessary, with 14% indicating a third-party training company should be used to ensure no "bad habits." 16% believe company training programs are fine while 11% indicate field training is sufficient.

Engineers were least likely to consider field training sufficient at only 5%, while excavators were least likely to endorse a third-party training company at 9%.

From an industry point of view, Excavators felt most strongly that a broad-based locator certification program including both classroom and field testing is necessary at 74%, followed closely by those identifying as electric industry at 70%. The Communications industry was least likely to find company training programs sufficient at only 8%, followed closely by the Electric industry at 10%. Only 3% of Gas & Oil industry respondents believe field training is sufficient.

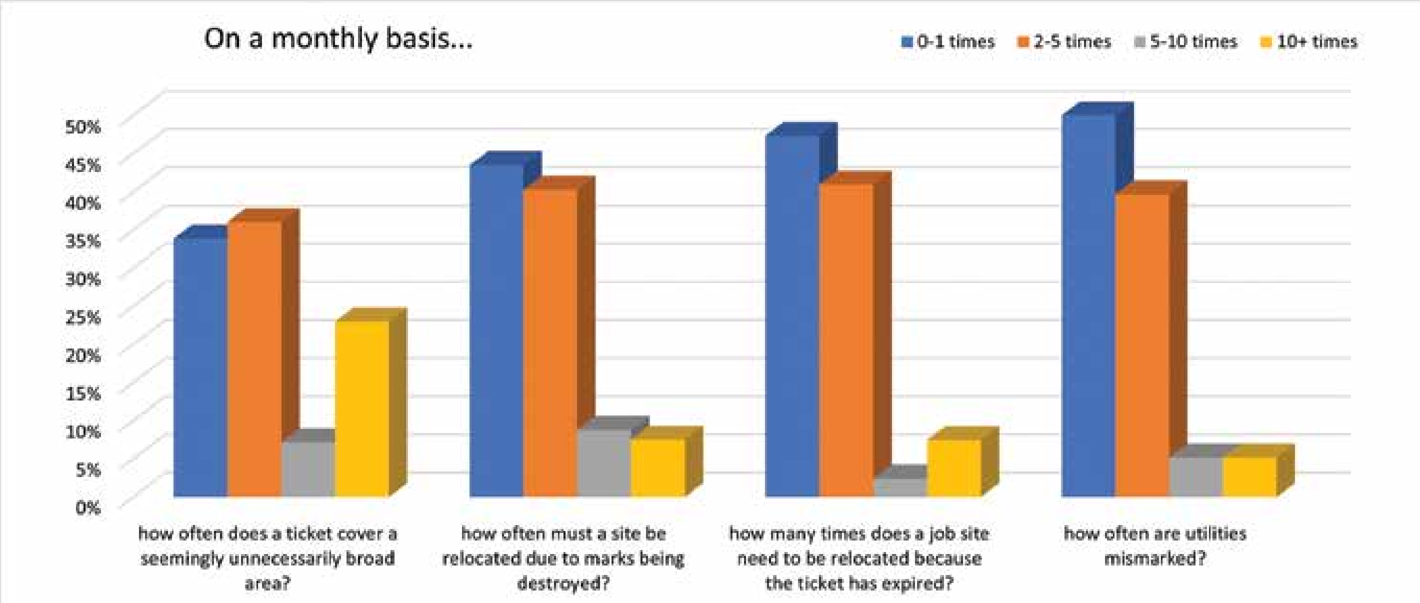
How often should a locate technician receive continued training or certification?

Almost half (48%) of respondents believe locate technicians should receive continuing education annually, with 45% believing it should be every 2-5 years. Regardless of industry or job function, few respondents felt continued training is unnecessary.

What tools do you use or require for locating buried utilities?

Locators indicate that their primary tool is an electromagnetic locator at 79%, with the second-choice option GPR at only 7%. The Water/Sewer industry was most likely to rely on visual indicators or common sense to locate utilities (38% of those responding with alternative methods).

80% of the Communications industry use the EM locator, while only 48% of Water & Sewer respondents indicated use of the EM locator. Engineers were most likely to utilize GPR at 18%, while those identifying as Govern-



ment/Regulatory (32%) and Public Works (31%) used GIS or A/R to the greatest degree.

On a monthly basis, how often must a site be relocated due to marks being destroyed?

Overall, 43% reported the need for a relocate 1-2 times per month, and 40% 2-5 times per month. 59% of locators report relocating required 2-5 times per month, with 21% reporting 5-10 times, and 8% reporting 10 or more. Those identifying as Communications report the highest percent of 10 or more relocate requests in a month at 22%.

Those identifying as Middle Management (Supervisor, Foremen) or Field Operations (Technician, Locator, Operator) were more likely to report a higher level of relocates (19%) vs Executive (Owner, CEO, COO, CFO, President) and Upper Management (Director, Manager) (11%)

On a monthly basis, how often does a ticket cover a seemingly unnecessarily broad area?

60% of excavators indicate only 0-1 tickets per month are overly broad, whereas locator results are inversely proportional with 61% indicating 10 or more each month. 71% of Executive CEO, COO, CFO, President report 0-1 times per month, while only 28% of Field Operations (Technician, Locator, Operator) agree.

On a monthly basis, how many times does a job site need to be relocated because the ticket has expired?

Logically, 44% of One Call respondents indicate the highest response for 10 or more relocate tickets each month along with 14% of locators and 5% of excavators. 66% of excavators report 0-1 relocates.

Water & Sewer (47%) are the most likely facility owner to see 0-1 relocates each month. The majority of facility owners report 5 or less relocates each month (Communications-71%, Electric-80%, Gas & Oil-72%, Water & Sewer-83%)

On a monthly basis, how often are utilities mismarked?

Regardless of industry or job function, most respondents agree mismarks happen 5 or fewer times per month, with 10% indicating 5 or more times. One Call reported the highest percent of 10+ times at 18%.

Rank the risk these locating issues pose to damage prevention of underground utilities (excluding failure to locate or unreported damage).

Regardless of industry or job function, every demographic ranked "Lack of training" as the #1 locate risk for damage prevention. Regardless of industry or job function, every demographic ranked "Insufficient technology" as the #2 locate risk for damage prevention.

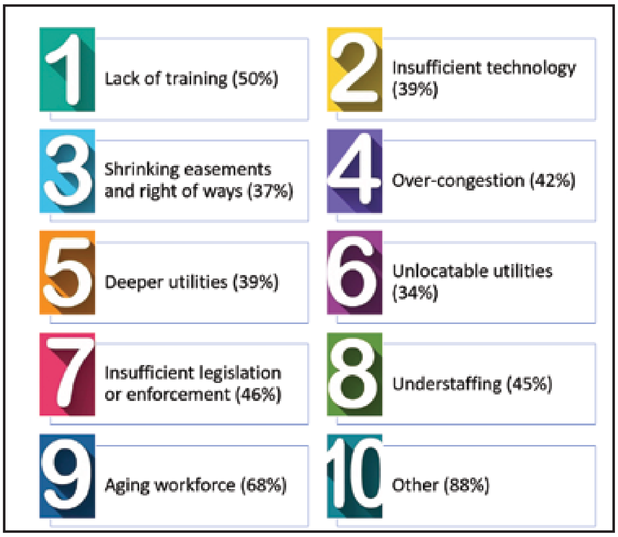
When prioritizing the execution of a locate ticket, which should be the top consideration?

Regardless of industry or job function, Emergency was ranked the top consideration for prioritizing a ticket. Only 9% of all respondents indicated High Consequence facilities first as the top consideration, although 19% of Gas & Oil respondents ranked it first. Less than one percent ranked Type of facility, Restoration of facilities, or Environmental impact a top consideration.

When hiring a Private/Contract Locator, what is the priority?

Regardless of industry or job function, Quality was ranked as the number one priority when hiring a private/contract locator, although 28% of Engineers felt Risk reduction was the priority and 30% of Excavators prioritized On-time performance. 29% of the communications industry also prioritized On-time performance.

11% of private locators felt price was a priority but only 2% of Executive (Owner, CEO, COO, CFO, President) agreed.



Demographics

14% of respondents identified as Executive (Owner, CEO, COO, CFO, President), 13% Upper Management (Director, Manager), 33% as Middle Management (Supervisor, Foremen), 40% as Field Operations (Technician, Locator, Operator).

5% of respondents identified as Communications, 4% Electrical, 8% Engineering, 16% Excavating, 7% Gas & Oil, 7% Government/Regulatory, 15% Locating, 2% One Call, 4% Other, 11% Public Works, 1% Trenchless Technology and 19% Water & Sewer. (Note that many respondents who identified as a locator in question 1 identified with their industry in question 13.)

99% of respondents were from the USA.

Data from this survey continues to be gathered and analyzed. Visit dp-PRO.com to view the full survey results or participate in other open industry surveys.

Our thanks to PelicanCorp for helping to underwrite the cost of this research. Individual responses are not shared with the underwriter or sold in any way. Infrastructure Resources employees assisting with research will have access to responses as needed.