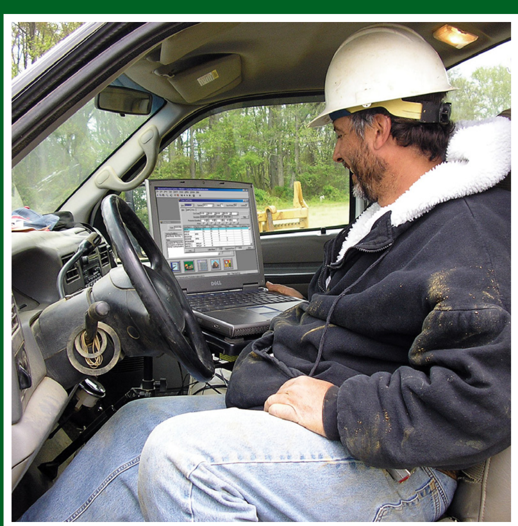
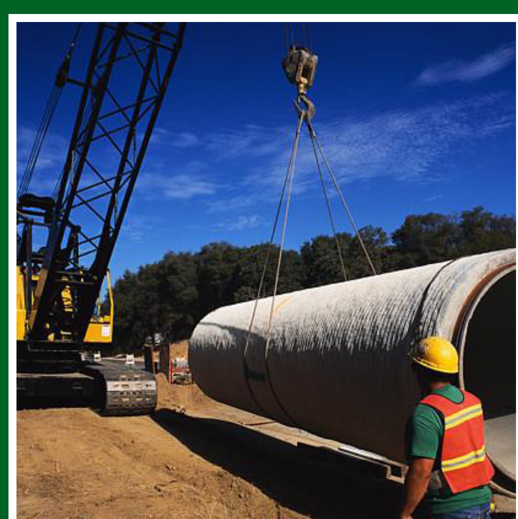
2013 Heavy Civil/Infrastructure Estimating Survey Results




HCSS

INNOVATIVE SOFTWARE

FOR THE CONSTRUCTION INDUSTRY

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2013 Heavy Civil/Infrastructure Estimating Survey Results

2 Survey Methodology

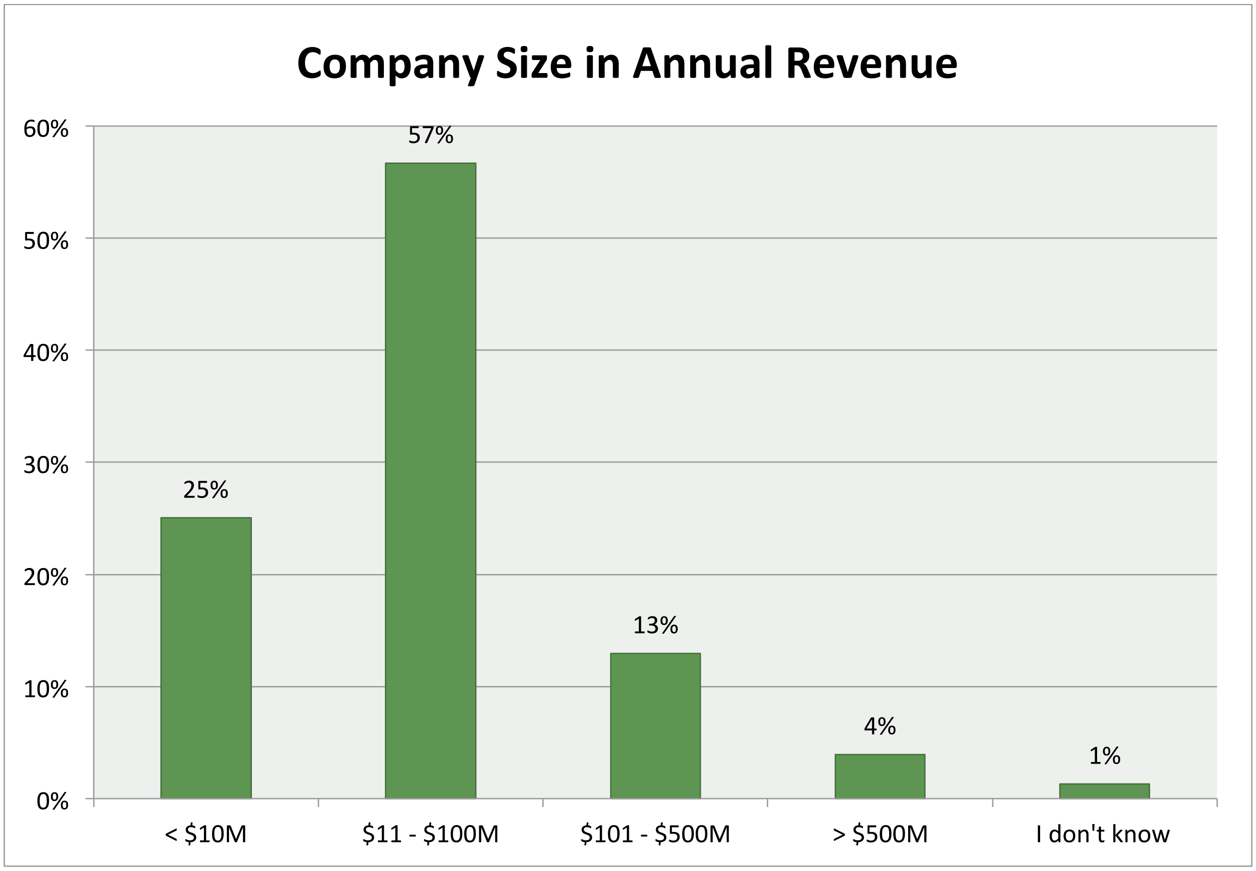
HCSS developed the 18 questions included in the 2013 State of Heavy Civil/Infrastructure Estimating Survey in collaboration with several members of our Advisory Board. We then emailed the survey to our HeavyBid customers where we had a single main estimating contact. We sent the survey to one contact per company to ensure that each company would only be represented once in the data, regardless of size and number of locations. All surveys were anonymous.

We received survey responses from 442 companies across the U.S. with respondents listing 47 different states and the District of Columbia as their primary state for operations. No state represented more than 8% of the respondents.

We would like to thank everyone who participated.

For questions, comments or permission to reprint any of the survey data in the report, contact Dan Briscoe, VP of Marketing at HCSS at dan.briscoe@hcss.com or call 800-683-3196.

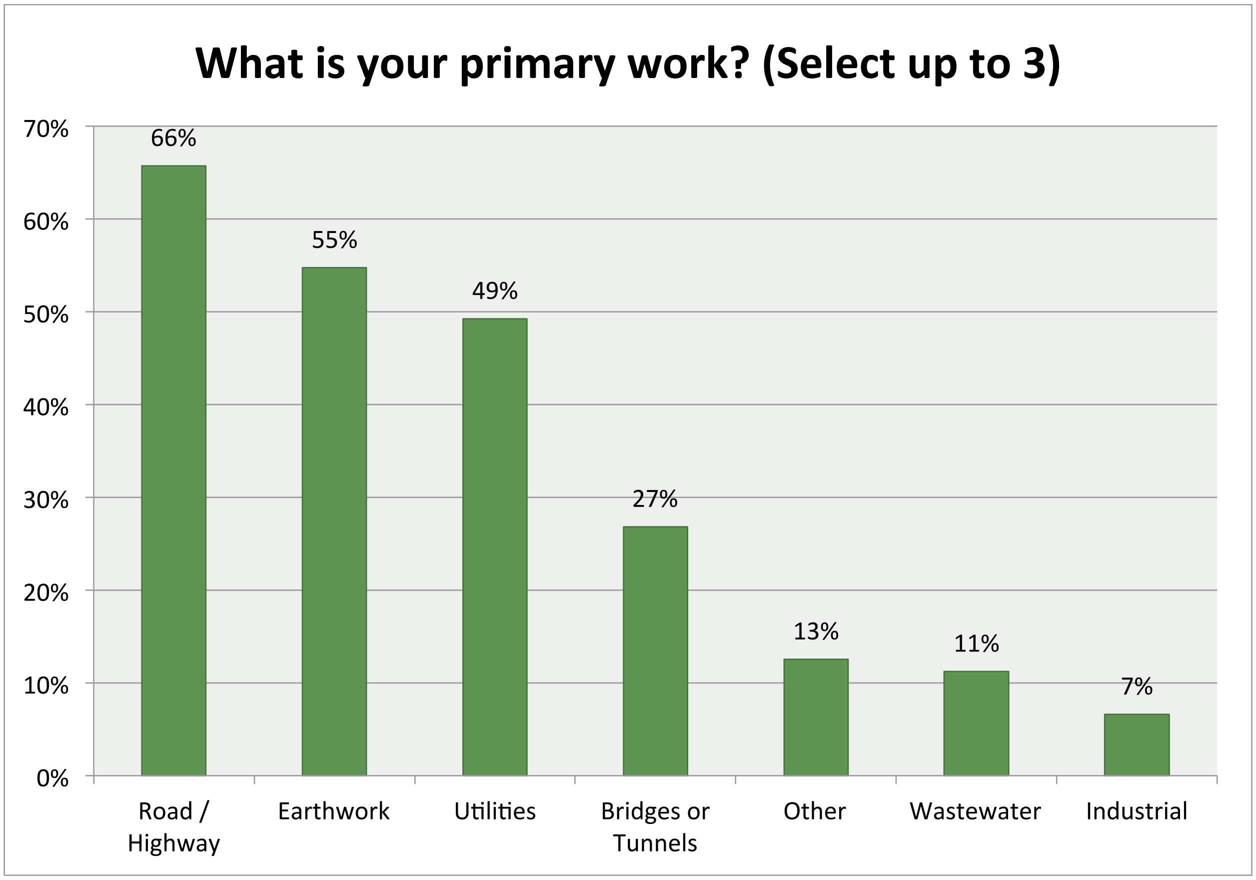
3 COMPANY SIZE



Revenue	% Response	# of Companies
< $10M	25%	112
$11 - $100M	57%	247
$101 - $500M	13%	56
> $500M	4%	17
I don't know	1%	4

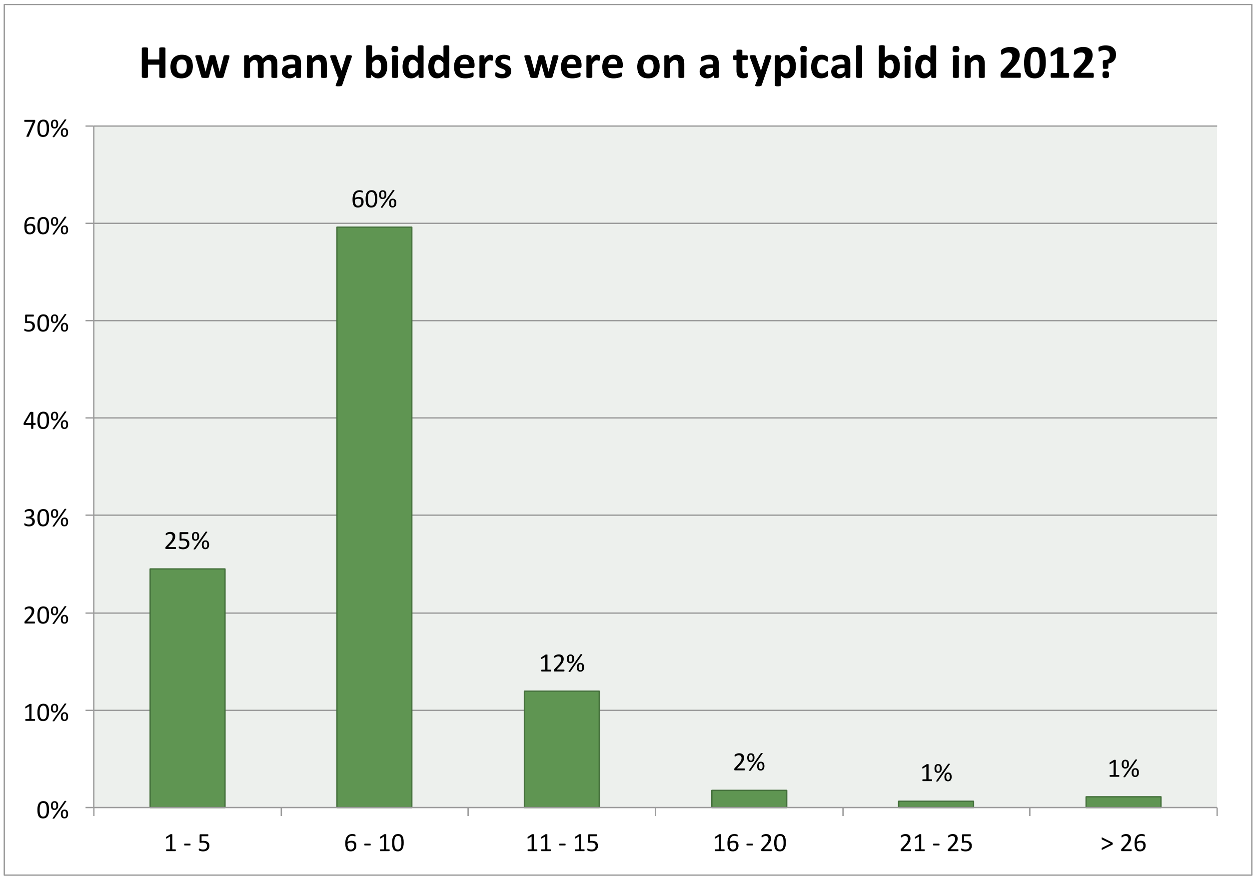
4 PRIMARY WORK

We asked companies to select their primary work specialty, and they were allowed to select up to 3 specialties.



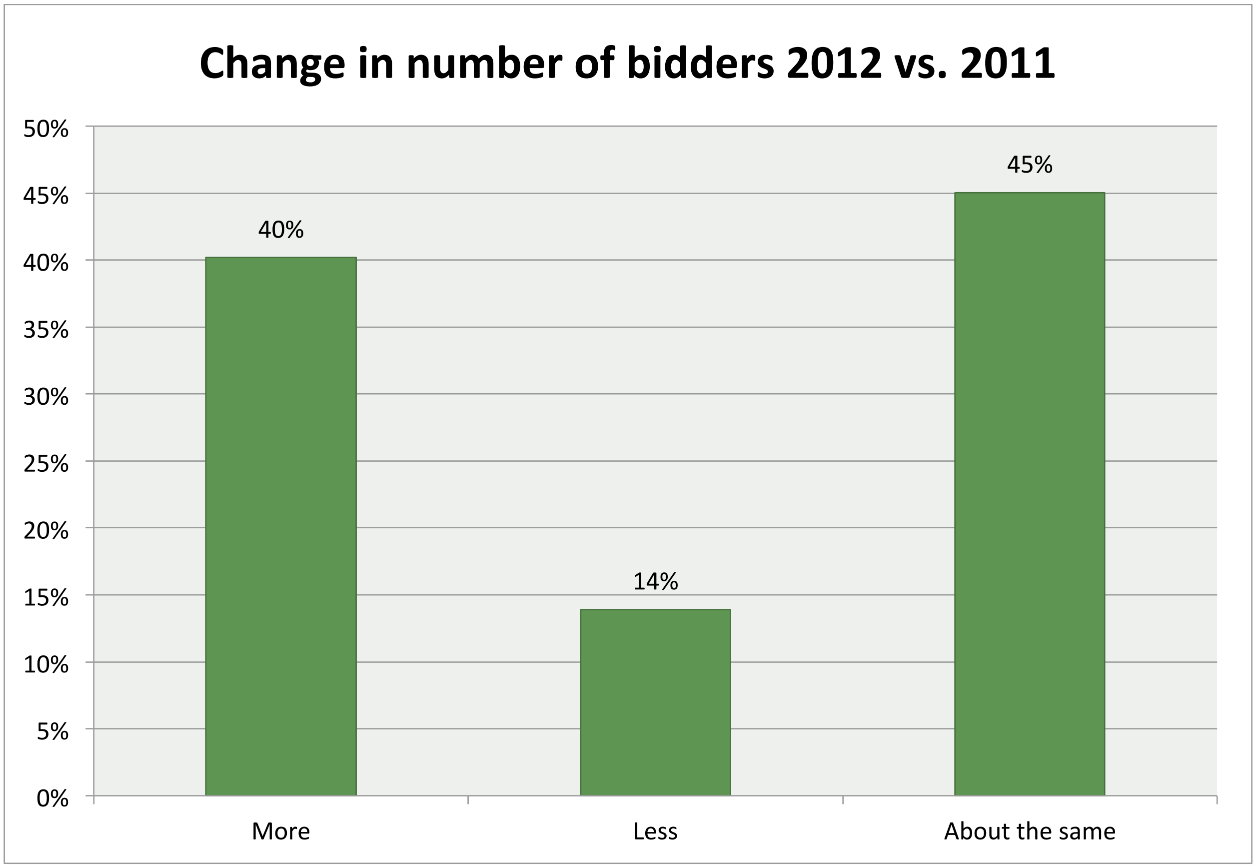
Choice	% Response	# of Companies
Road / Highway	66%	287
Earthwork	55%	216
Utilities	49%	237
Bridges or Tunnels	27%	117
Other	13%	29
Wastewater	11%	49
Industrial	7%	55

5 BIDDERS PER JOB



Choice	% Response	# of Companies
1 - 5	25%	102
6 - 10	60%	262
11 - 15	12%	53
16 - 20	2%	8
21 - 25	1%	3
> 26	1%	5

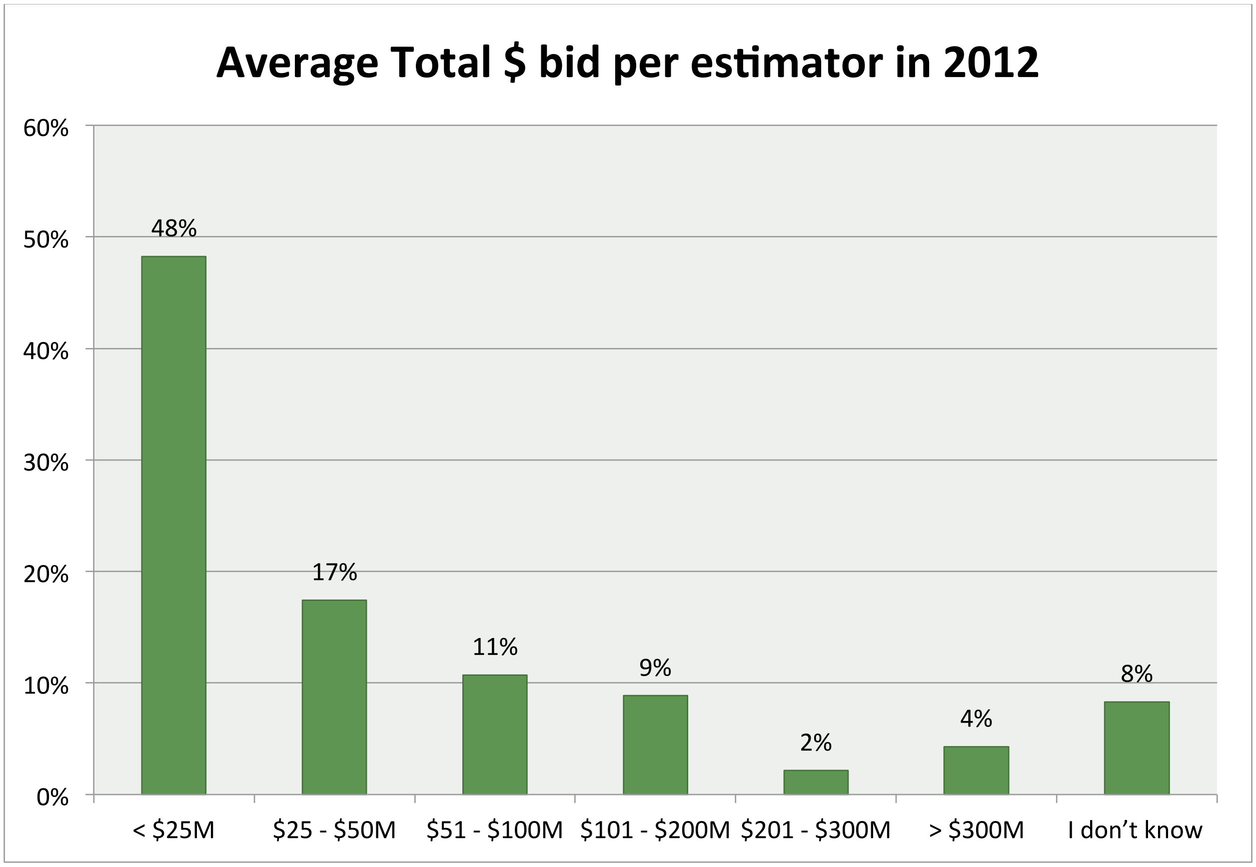
6 TREND IN NUMBER OF BIDDERS



Choice	% Response	# of Companies
More	40%	174
Less	14%	62
About the same	45%	196

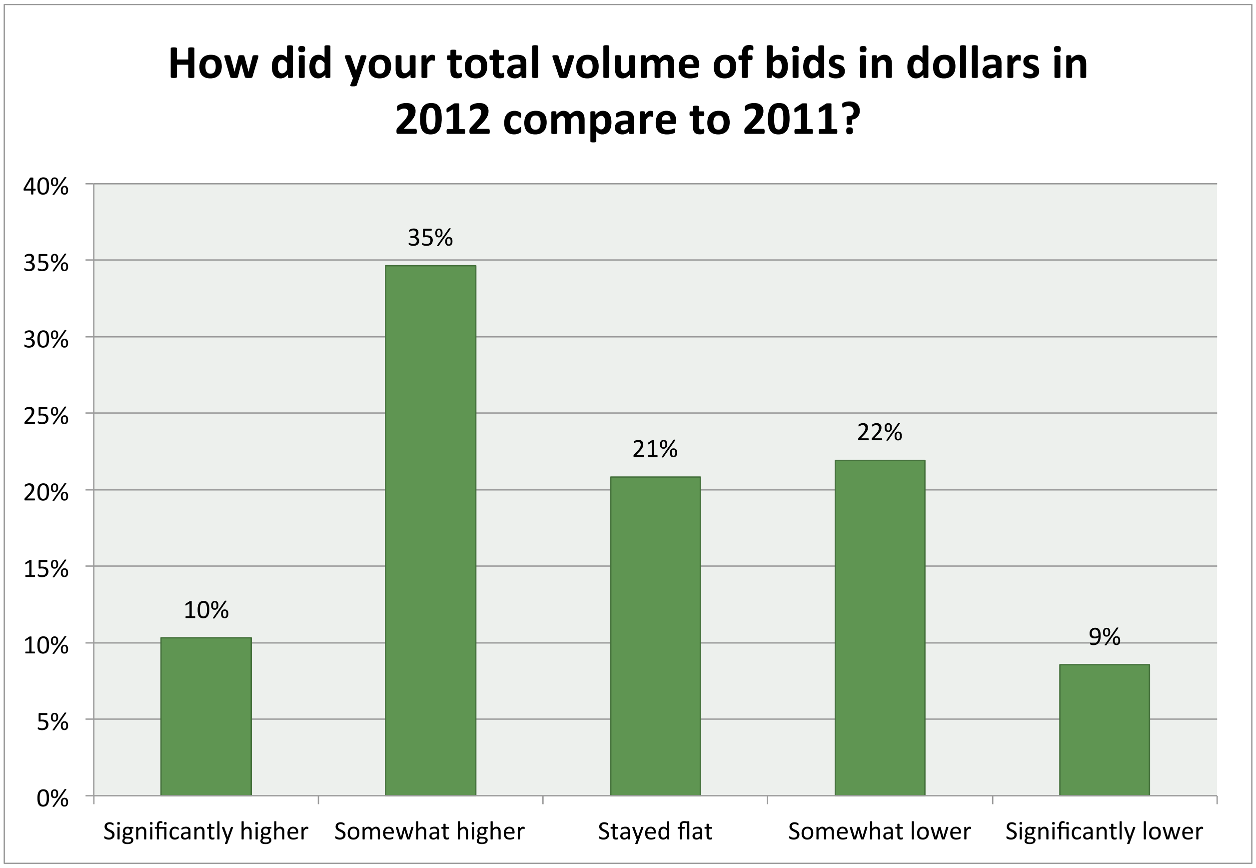
7 AVERAGE TOTAL $ BID PER ESTIMATOR

At the beginning of the survey, there was only one selection for total bid dollars per estimator less than $50 million. After the first 70 respondents, we had almost 70% selecting less than $50 million, so we split the group into averages of less than $25 million and $25 - $50 million.



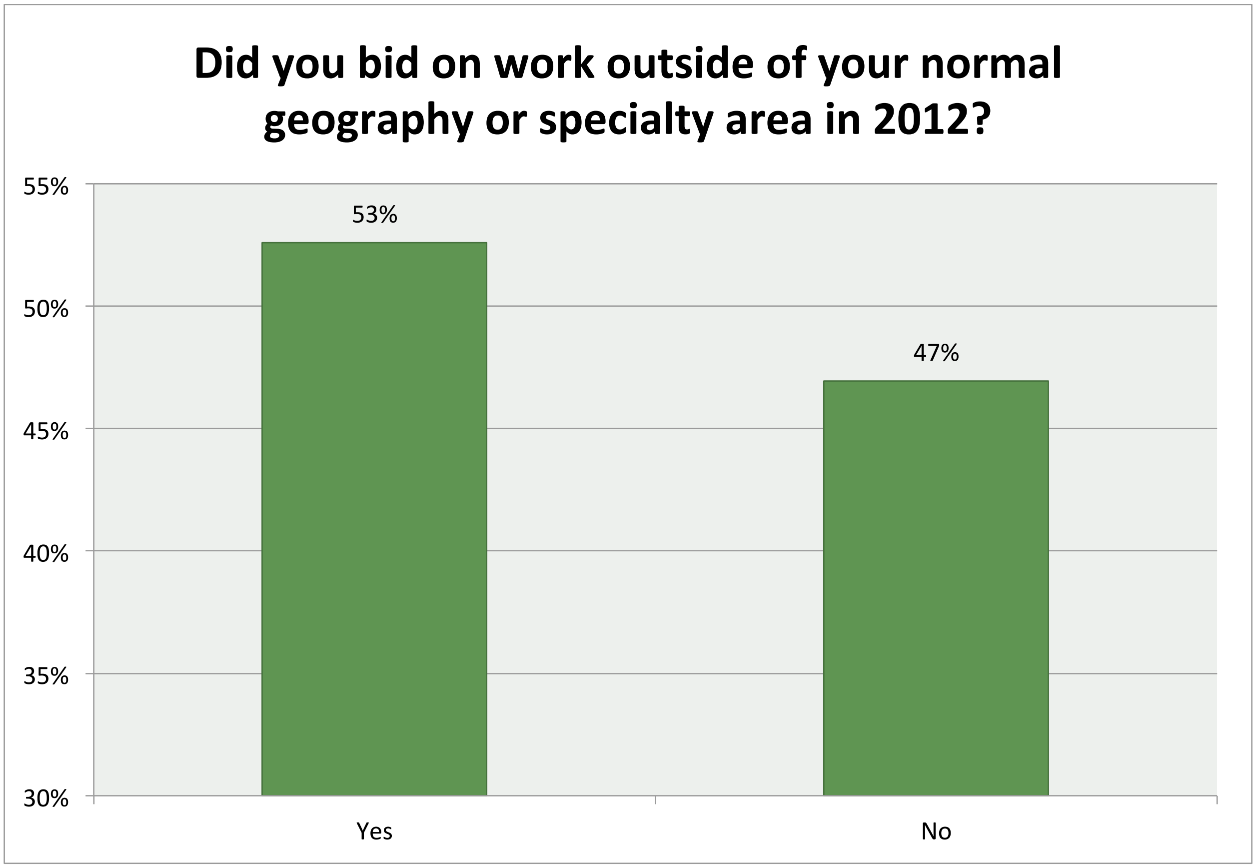
Choice	% Response	# of Companies
< $25M	48%	176
$25 - $50M	17%	63
$51 - $100M	11%	39
$101 - $200M	9%	33
$201 - $300M	2%	8
> $300M	4%	16
I don't know	8%	30

8 BID VOLUME 2012 VS. 2011



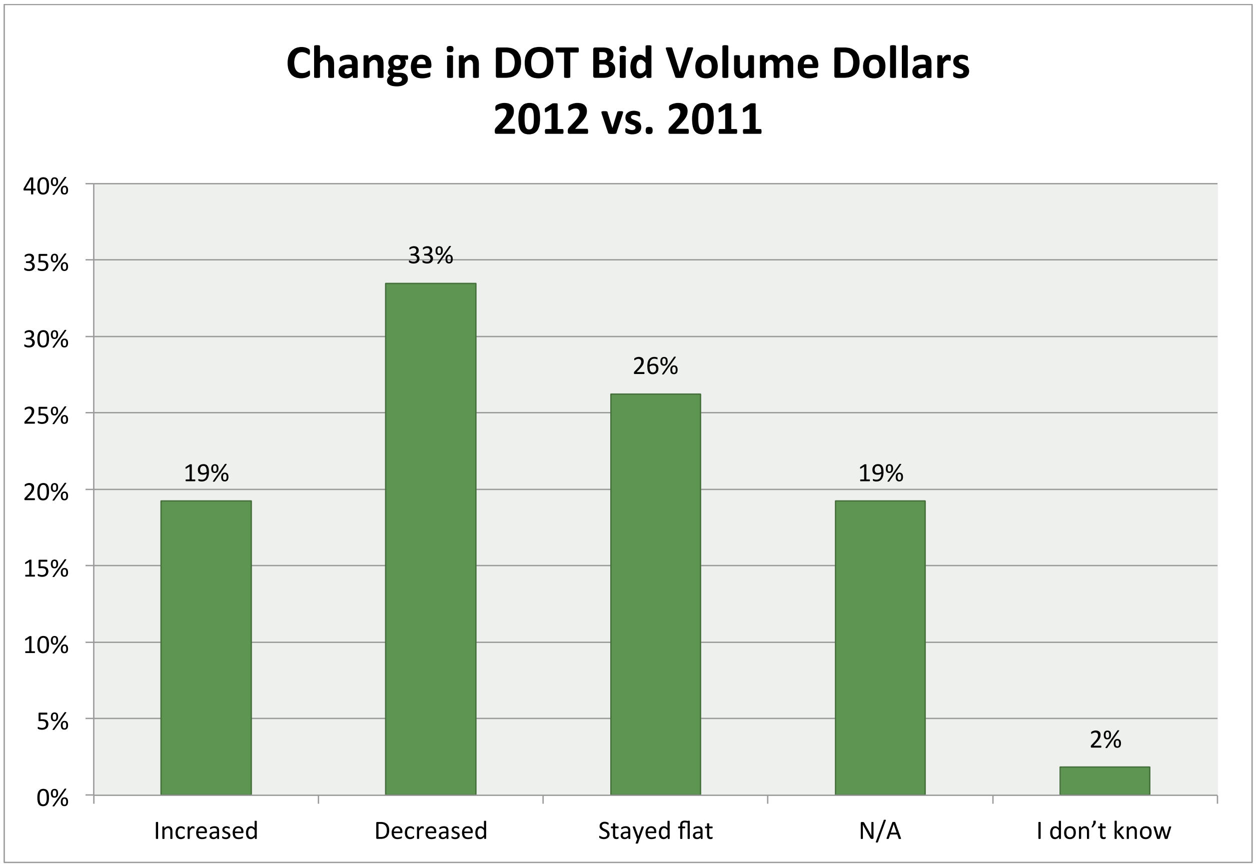
Choice	% Response	# of Companies
Significantly higher	10%	43
Somewhat higher	35%	153
Stayed flat	21%	89
Somewhat lower	22%	99
Significantly lower	9%	39

9 BID ON WORK OUTSIDE OF GEOGRAPHY OR SPECIALTY



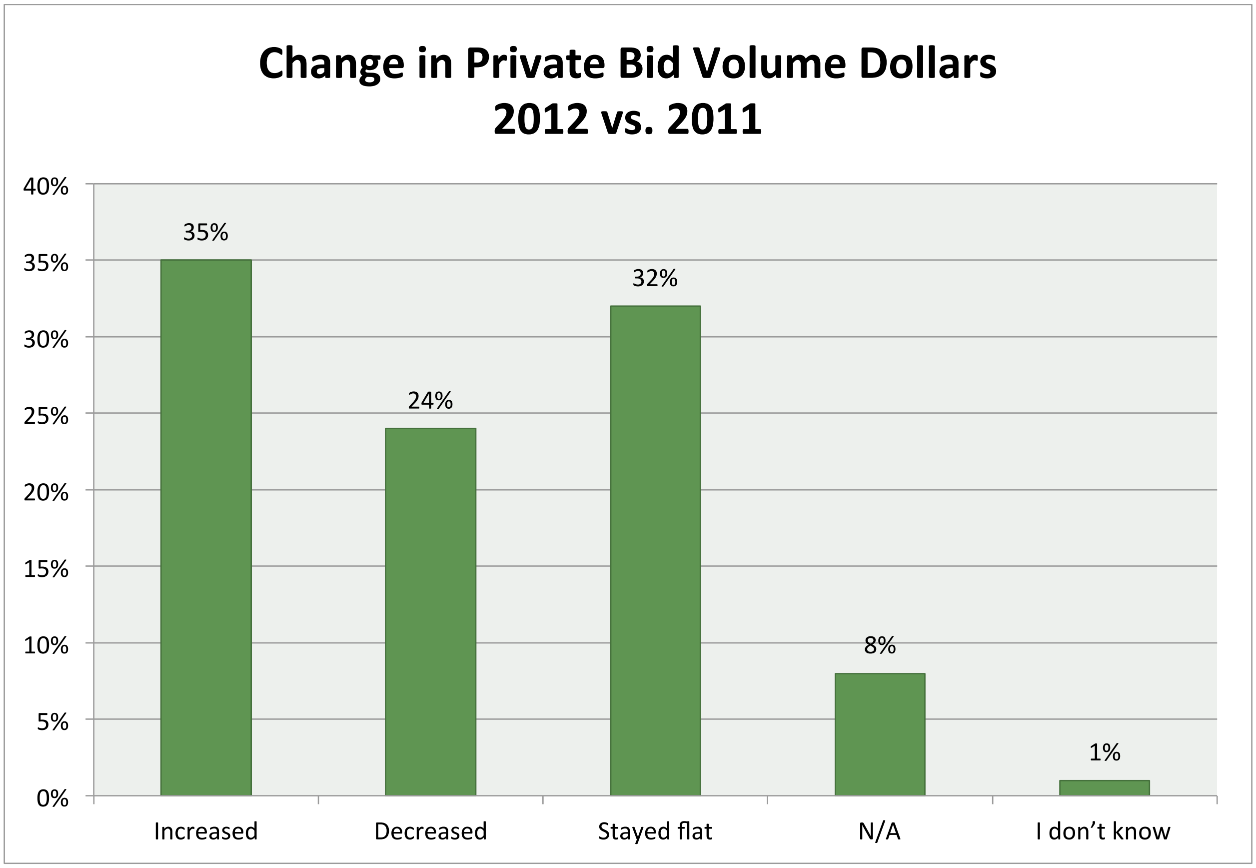
Choice	% Response	# of Companies
Yes	53%	230
No	47%	203

10 DOT BID VOLUME



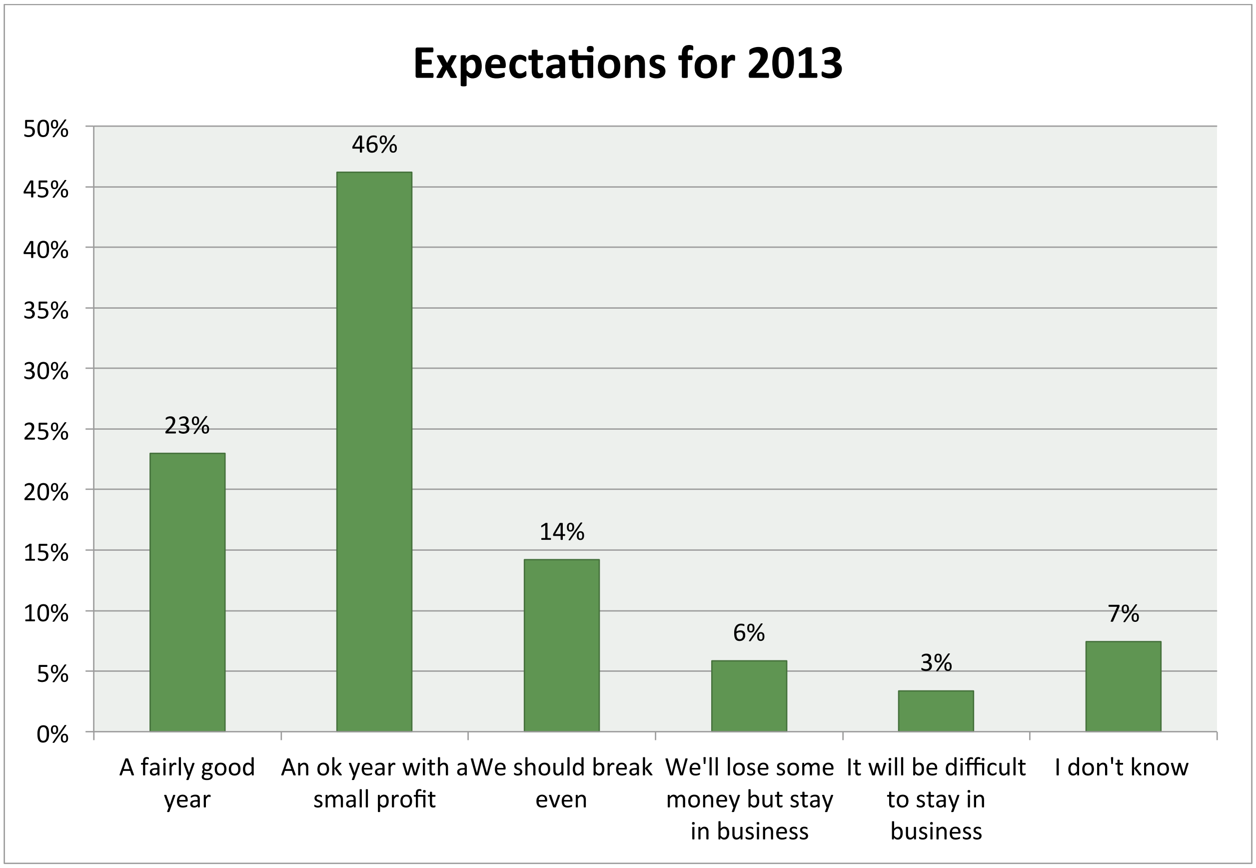
Choice	% Response	# of Companies
Increased	19%	85
Decreased	33%	148
Stayed flat	26%	111
N/A	19%	83
I don't know	2%	7

11 PRIVATE BID VOLUME



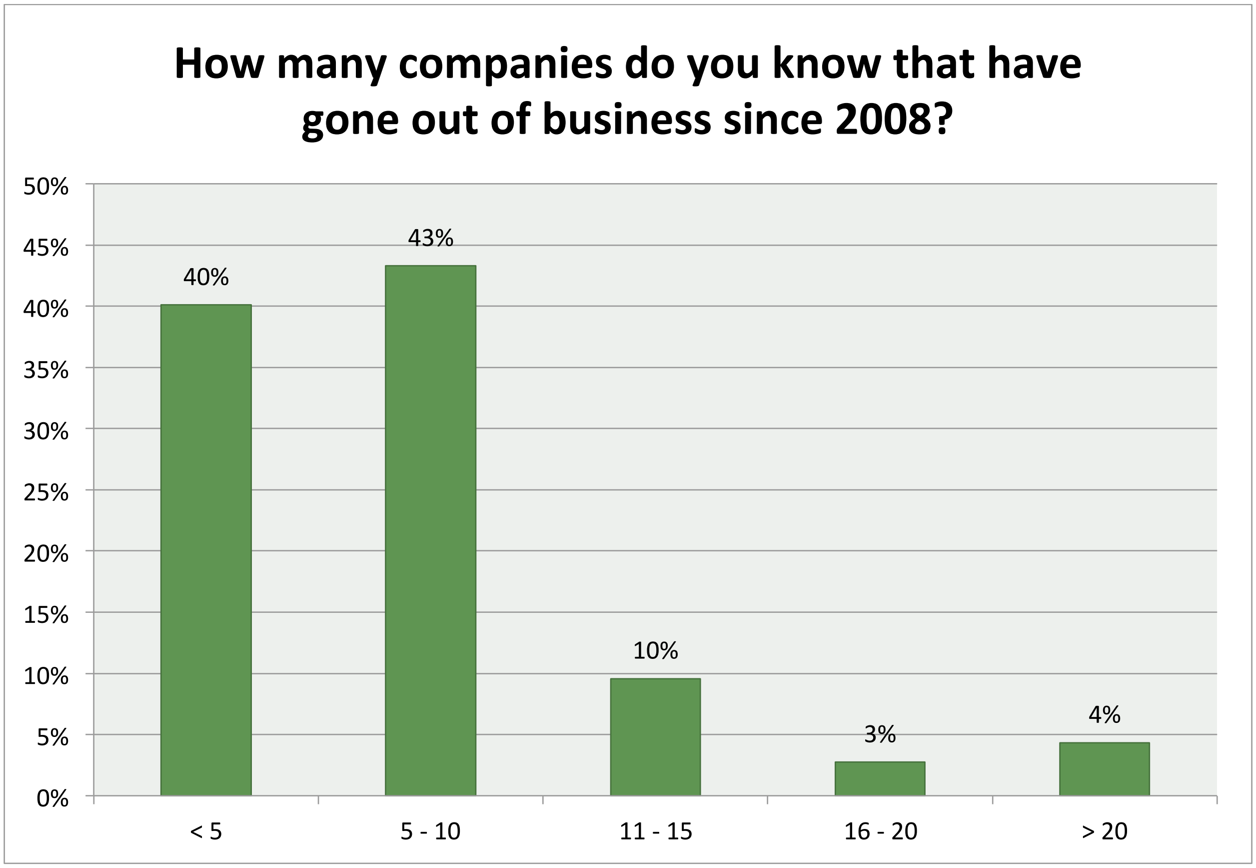
Choice	% Response	# of Companies
Increased	35%	151
Decreased	24%	104
Stayed flat	32%	136
N/A	8%	39
I don’t know	1%	4

12 FINANCIAL OUTLOOK FOR 2013



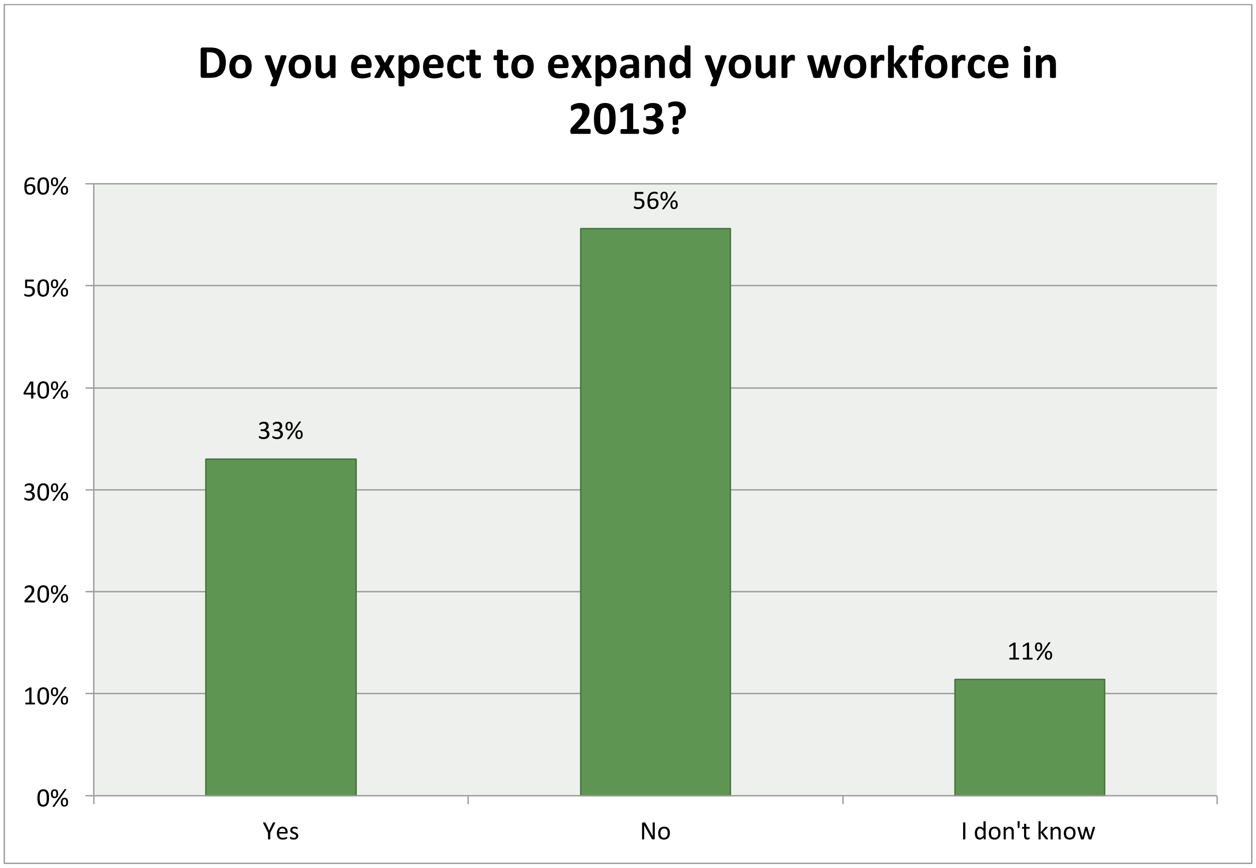
Choice	% Response	# of Companies
A fairly good year	23%	101
An ok year with a small profit	46%	201
We should break even	14%	62
We'll lose some money but stay in business	6%	26
It will be difficult to stay in business	3%	15
I don't know	7%	31

13 COMPANIES OUT OF BUSINESS



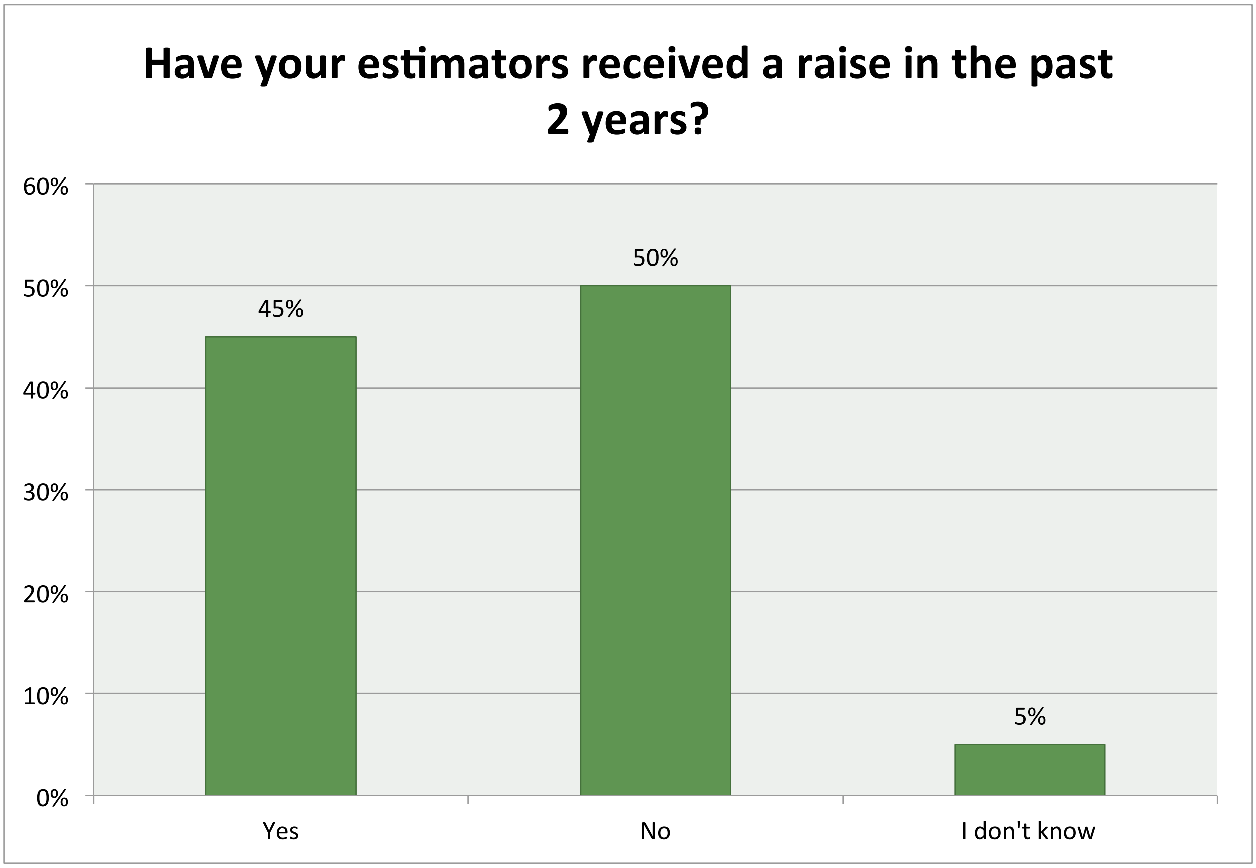
Choice	% Response	# of Companies
< 5	40%	173
5 - 10	43%	188
11 - 15	10%	41
16 - 20	3%	12
> 20	4%	19

14 EXPAND WORKFORCE



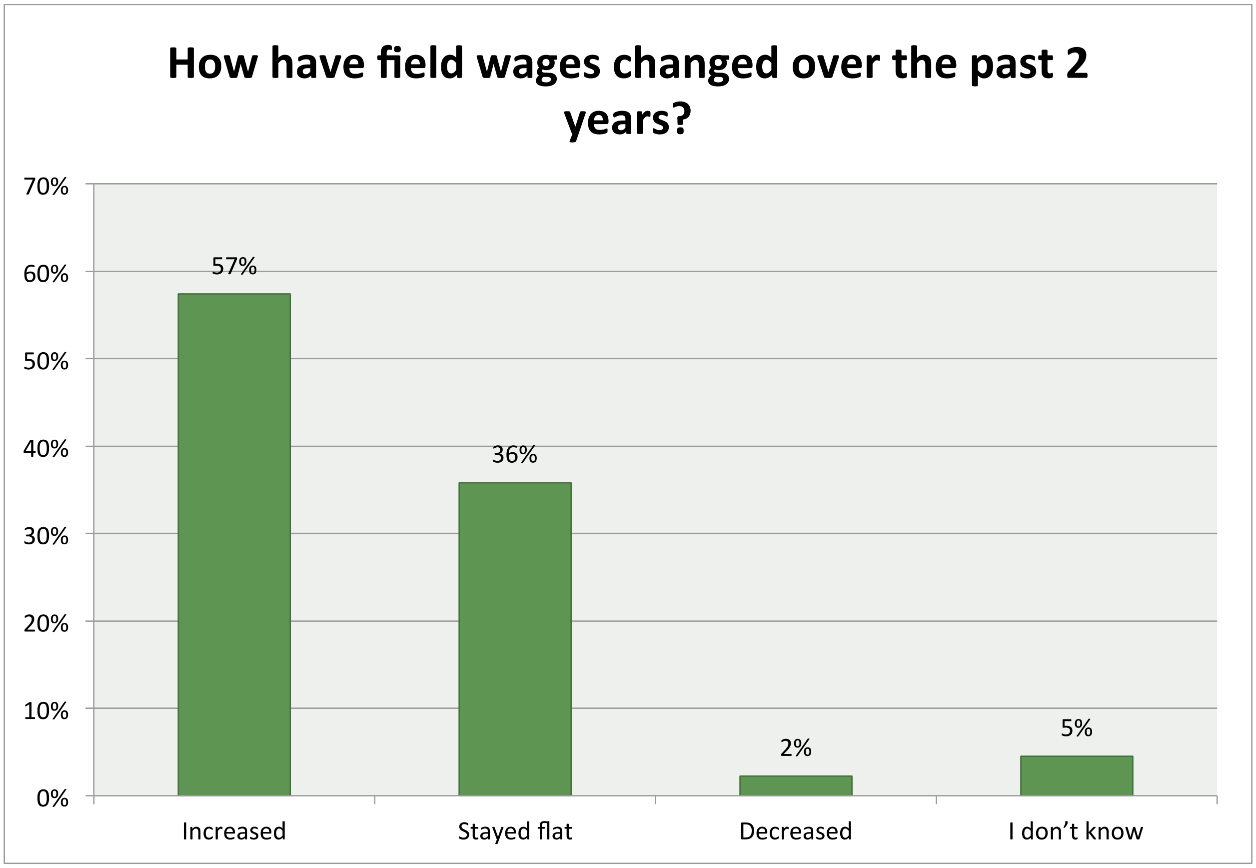
Choice	% Response	# of Companies
Yes	33%	144
No	56%	243
I don't know	11%	49

15 ESTIMATOR RAISES



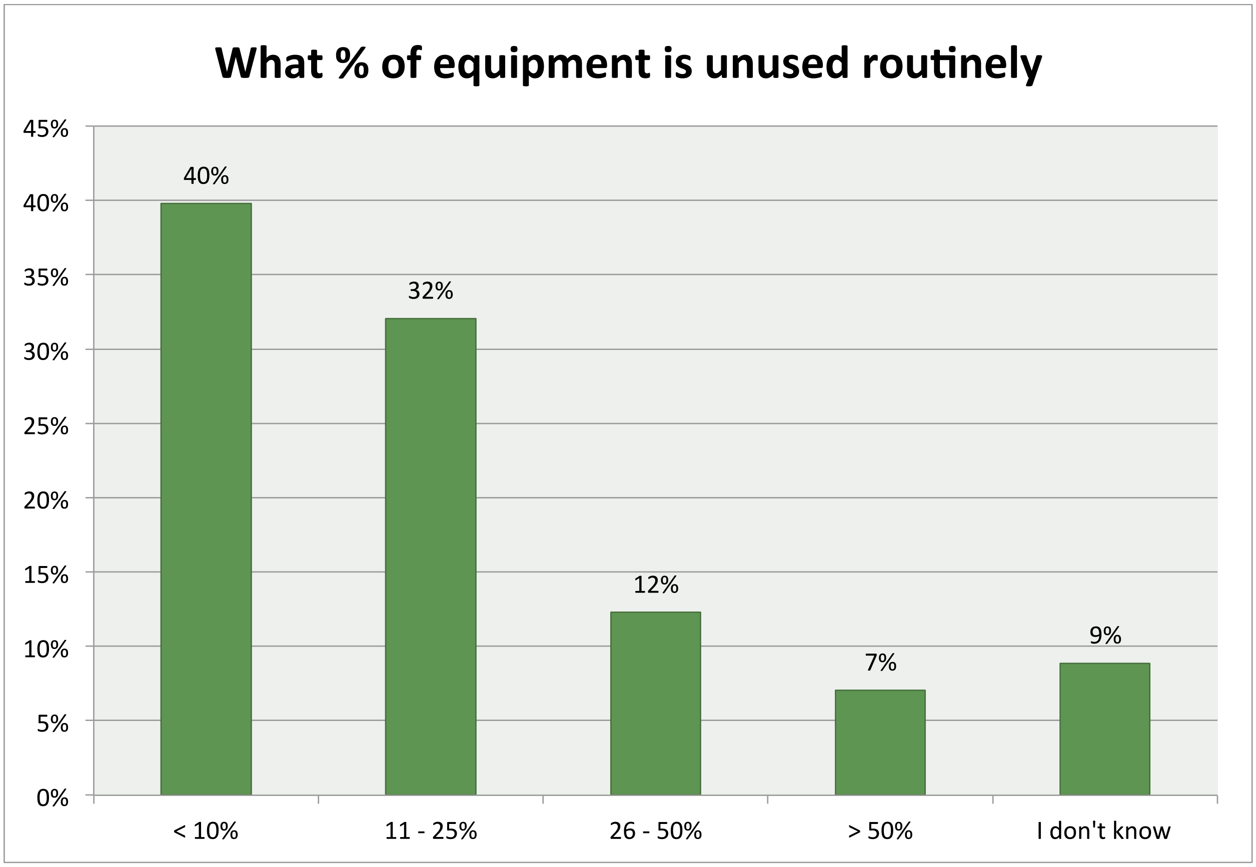
Choice	% Response	# of Companies
Yes	45%	197
No	50%	218
I don't know	5%	23

16 FIELD EMPLOYEE RAISES



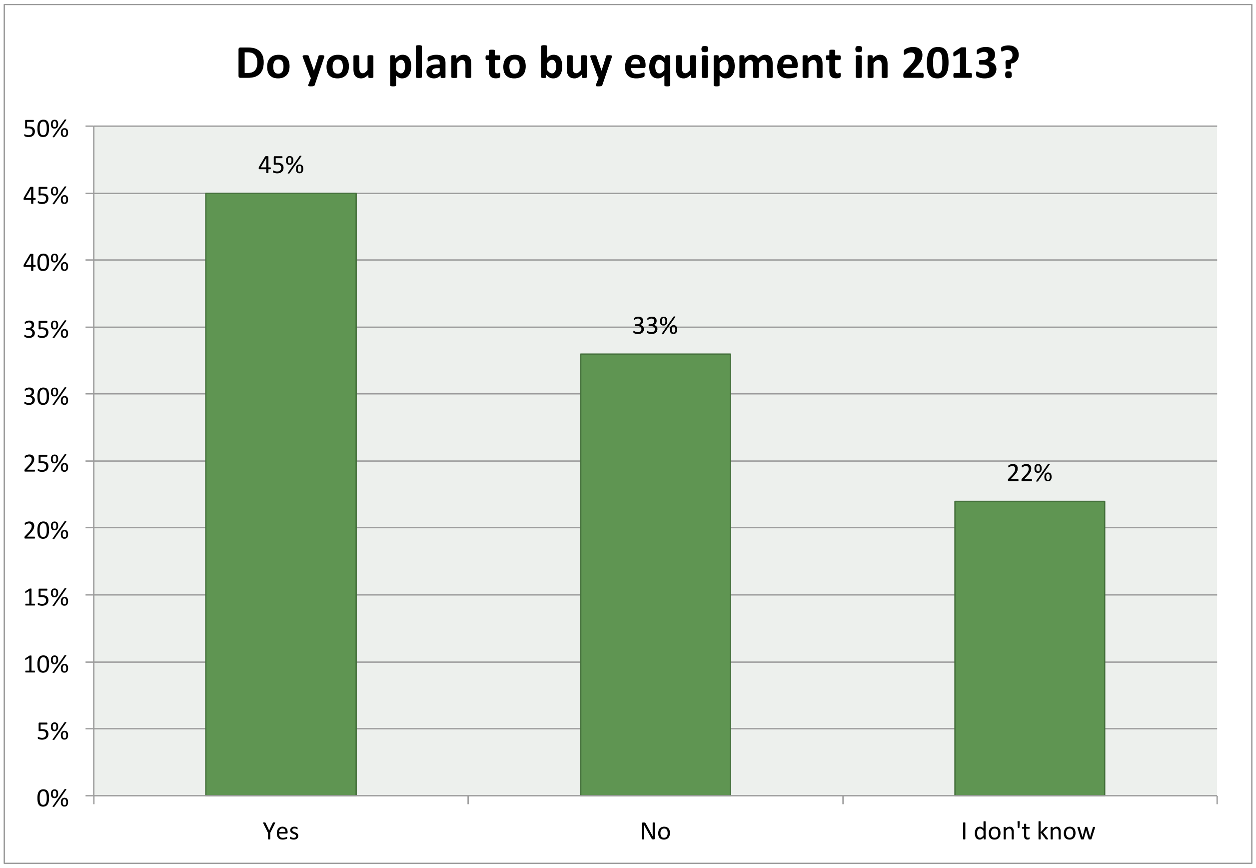
Choice	% Response	# of Companies
Increased	57%	253
Stayed flat	36%	157
Decreased	2%	9
I don't know	5%	19

17 EQUIPMENT UTILIZATION



Choice	% Response	# of Companies
< 10%	40%	173
11 - 25%	32%	141
26 - 50%	12%	54
> 50%	7%	31
I don't know	9%	38

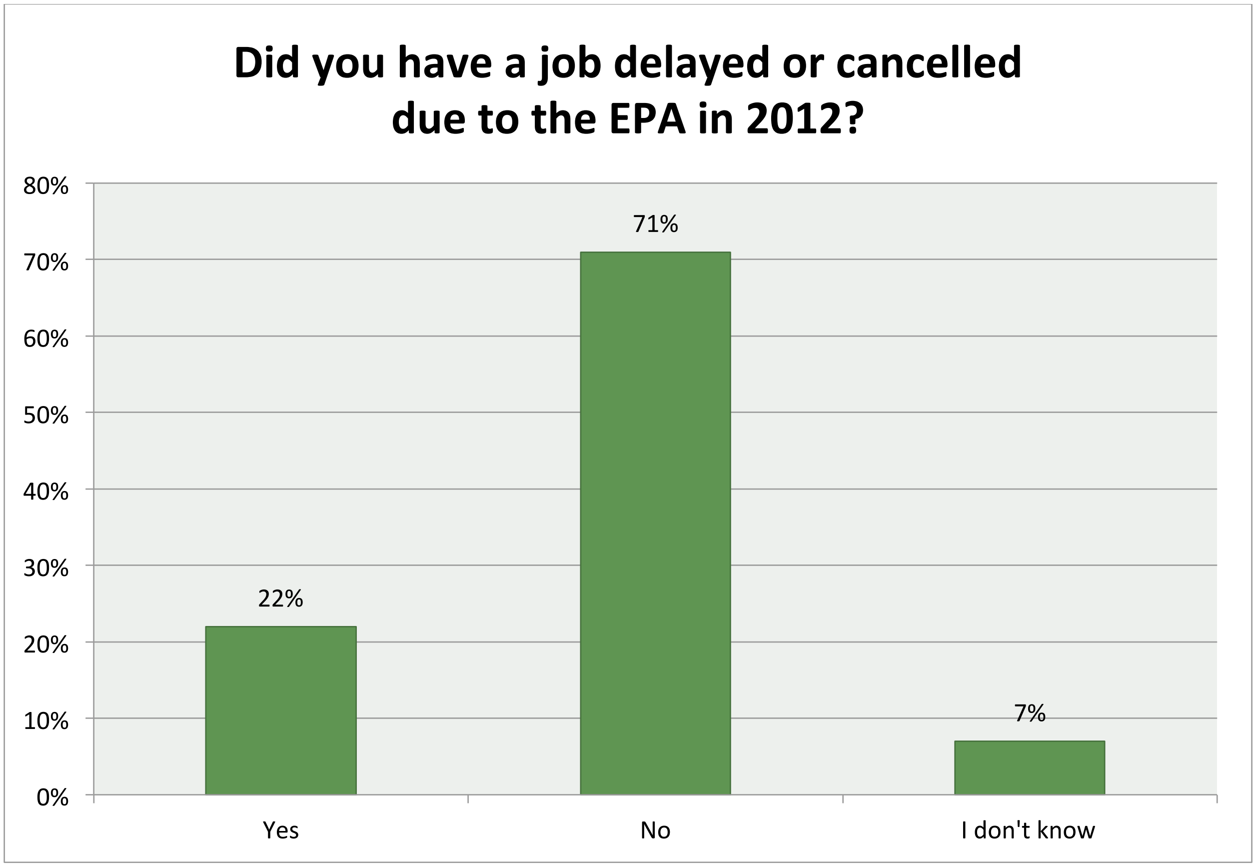
18 EQUIPMENT PURCHASES



Choice	% Response	# of Companies
Yes	45%	194
No	33%	144
I don't know	22%	97

19 EPA DELAYS

22% of companies reported having a job delayed or cancelled due to the EPA in 2012.



Choice	% Response	# of Companies
Yes	22%	96
No	71%	309
I don't know	7%	30