



Civil Contractors Federation Highlights of the National Member Survey

Key findings:

- Confirms diversity of the industry – while civil contractors are predominately small businesses, the Federation’s membership comprises firms of all sizes including national and international companies.
- The industry is diverse in terms of degree of work specialization. While one third of respondents specialise in fewer than 5 types of work, the rest are very diversified.
- Indicates stability of industry and ownership.
- The degree of penetration of both generic quality systems (ISO) and the CCF system (IMS) shows an underlying commitment to process accreditation.
- Equipment & light vehicle usage and fuel consumption are all significantly higher than pre-survey estimates.
- High levels of mobile phone usage, phone/fax expenditure and computer usage.

About the survey

The purpose of the National Member survey is to provide information to:

- Help identify trends within the industry
- Assist the Federation to substantiate the worth of the industry when engaging federal and state governments
- Assist the Federation in forward strategy planning
- Assist the Federation in providing targeted services that meet Member needs

Industry profile

The Building and Construction Industry is a key driver of activity in the Australian economy. In the year 2001-2002, the value of total turnover for the industry was almost \$60 billion, of which:

- 44% was residential building,
- 22% was non-residential building and
- 34% engineering construction.

As a whole, the industry contributed 5.6% (over \$39 billion) to the GDP of all industries and in May 2002 accounted for nearly 8% of the labour force (720,700) (ABS).

The full survey report is available to CCF Members.

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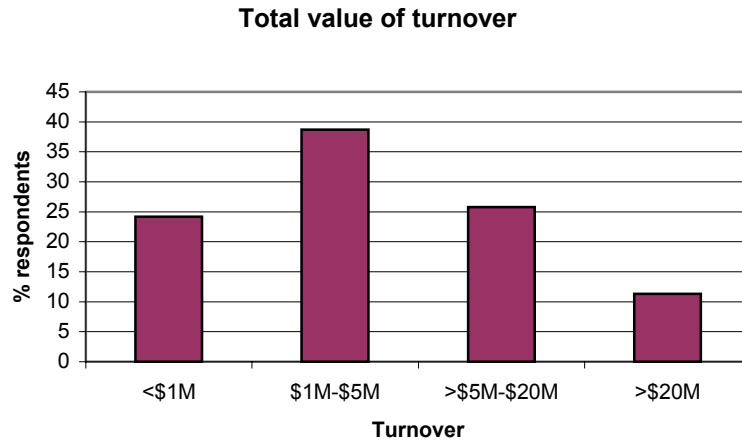
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Membership profile & equipment usage – a snapshot of results

TURNOVER

Civil Contractors are predominately small businesses. Nationally, two thirds of respondents have turnover of less than \$5M. One quarter of work falls in the \$5M - \$20M category. Around 3% of respondents have a turnover of greater than \$50M.



EMPLOYEES

Nationally, 25% of respondents employ between 21 and 50 people. About 17% of respondents employ less than 6 people and 6% employ more than 100.

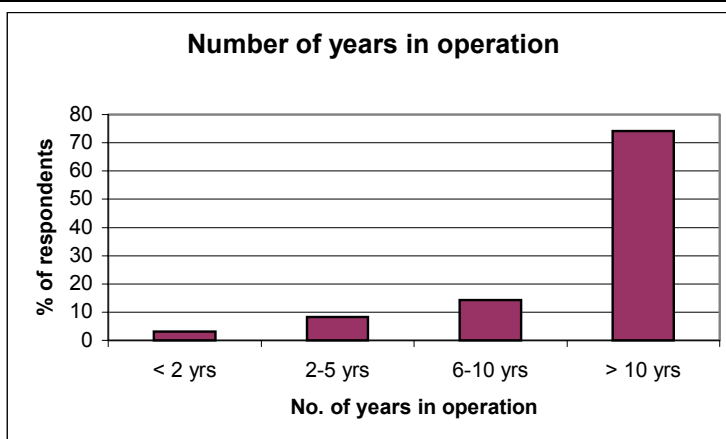
Total CCF Member employment is around 50,000.



NO. OF YEARS IN OPERATION

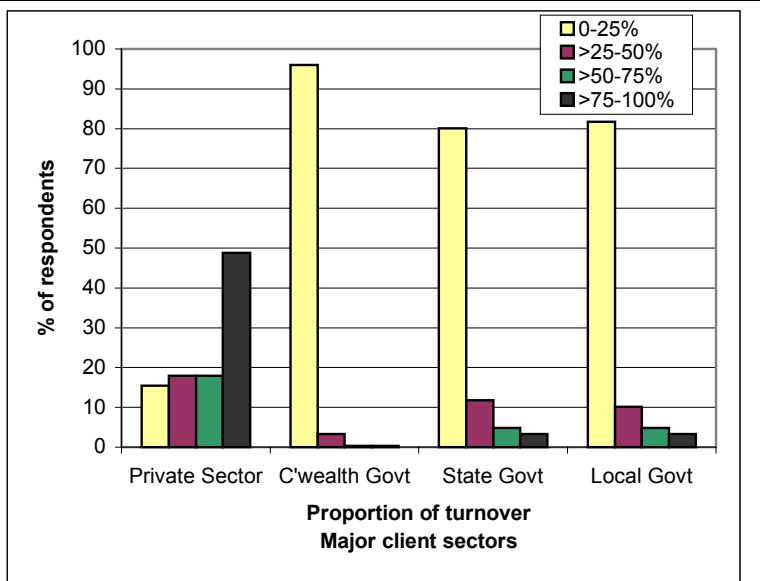
Nationally, about three quarters of respondents' businesses have been operating for more than 10 years, indicating stability of industry and ownership.

Around 20% of respondents operate interstate.



MAJOR CLIENTS

For about 50% of all survey respondents, private sector clients account for 75-100% of total turnover reflecting the continued shift from public to private sector provision of infrastructure and the cyclical nature of public sector funding and business cycles.

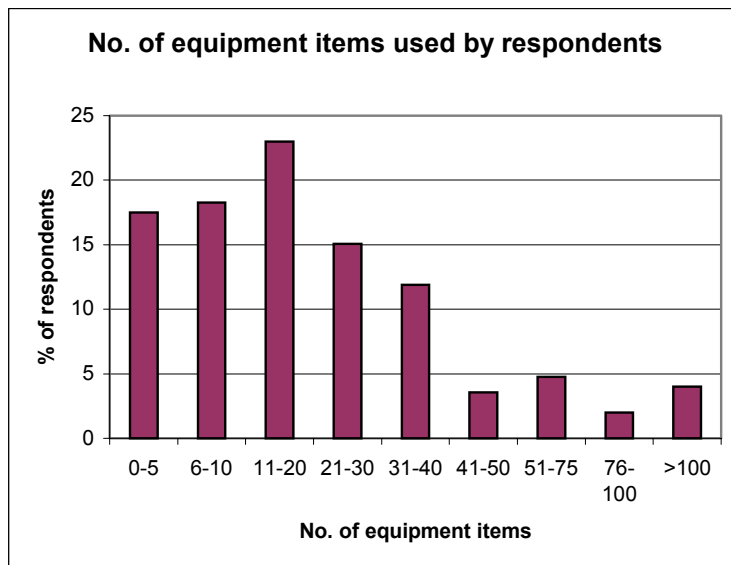


EQUIPMENT USAGE

Around 50% of respondents use between 11 and 40 items of equipment. About 11% use more than 50 items.

The most prevalent equipment type is the excavator, which is used by about 75% of respondents. Equipment types operated by around 50% of respondents are: backhoe/loaders, single axle trucks, rollers, wheel loaders, graders, skidsteer loaders and water carts.

In total around 40,000 items of plant and equipment are used in the industry.



WORK TYPES PERFORMED BY CIVIL CONTRACTORS

The five most prevalent work types performed are: earthworks (79%), minor road construction (60%) stormwater & outfall drainage (55%), plant hire (54%) and subdivisional roadworks (47%).

Work type	% Resp.	Work type	% Resp.
Earthworks	79	Underground power reticulation	19
Agricultural earthworks	22	Telecommunication reticulation	17
Dams and tailing dams	27	Trenchless or directional boring	6
Minor road construction	60	Landscaping/Tree management	18
Major road construction	24	Retaining walls	33
Subdivisional roadworks	47	Asphalt or sealing	23
Freeway construction	8	Kerbing and concrete paving	33
Road maintenance	24	Block and other paving	13
Stormwater & outfall drainage	55	Plant hire	54
Water reticulation & renewal	40	Mining	10
Sewer reticulation & renewal	42	Quarrying	21
Gas reticulation	9	Waste disposal	7
Large pipeline construction	18	Demolition	18
Bridge and non building construction	16	Construction authority or client	4

Specialist work categories include: sports surfaces, traffic control, site remediation/decontamination, total project management, asbestos removal, erosion control, revegetation, recycling, geotechnical drilling, transport, engineering design, site preparation for housing, IT services including CIVILCAD, mechanical repairs, marine construction, railwork, building – residential, commercial & industrial.

NUMBER OF WORK TYPES PERFORMED

Nationally, a significant group of respondents (around one third) are quite specialized performing fewer than 5 types of work. The rest are very diversified with the biggest group (about half) performing between 5 and 12 types of work.

