

2027 EDITION · US AND CANADA

State of Subsurface Scanning & Utility Locating 2027

How scanning and locating companies win work, price it, staff it and get paid. Built from public industry data and a hand check of 101 company websites.

A series of overlapping, wavy lines in shades of blue and white, creating a sense of motion and depth across the middle section of the page.

\$83.2B

yearly cost of damage to US buried utilities

38%

average chance a dig can't start on time because locates aren't done

85%

of scanning and locating websites we checked show no price at all

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ABOUT THIS REPORT

Who it's for

Owners and office managers at companies that do concrete scanning (GPR and X-ray) and private utility locating, from one-truck shops to regional crews. The GCs, electricians, plumbers and engineers who hire them will find plenty here too.

How we built it

Two sources. First, public data from the groups that count damage, money and labor: the Common Ground Alliance (CGA), the US Census Bureau, the Associated General Contractors of America (AGC), the Fiber Broadband Association, Ontario One Call and others. Every figure carries a source number you can look up on page 20.

Second, our own audit. In October 2026 we checked the websites of 101 independent scanning and locating companies by hand (84 in the US, 17 in Canada) and recorded how each one prices, books and delivers its work. We report totals only, never names.

What it isn't

A survey. We didn't ask owners for their books, so you won't find invented averages for revenue or margin here. Where the data runs out, we say so. The next edition will add an operator survey. If you'd like to take part, email hi@clevra.ai.

Money is in US dollars unless marked CAD. Published October 2026 by Clevra, a field service app for trade crews, based in British Columbia.

Terms we use

811 / one call. The free service excavators call before digging. Utilities mark their own public lines.

DIRT. CGA's Damage Information Reporting Tool, the largest database of buried-utility damage.

Private locating. Finding lines 811 doesn't mark, mostly on the owner's side of the meter.

SUE. Subsurface utility engineering: locating and mapping utilities to a stated quality level for design.

Concrete scanning. GPR or X-ray imaging of slabs and walls before cutting, coring or anchoring.

Quality level (QL). ASCE 38-22's grades of how reliable a utility location is, from D to A.

EXECUTIVE SUMMARY

The year in ten numbers

More digging, more damage, not enough people to read the ground, and a market that still mostly sells by phone. Here's the short version.

\$83.2B

Yearly cost of damage to US buried utilities. Only 5.9% of it is the repair.

CGA, August 2026

221,717

Unique damage reports in 2025. CGA's damage index hit a record 102.

CGA DIRT 2025

27.4%

Share of 2024 damages caused by four locating and marking failures.

CGA DIRT 2024

38%

Average chance a dig couldn't start on time because locates weren't complete.

CGA DIRT 2024, eight 811 centers

\$85B

Annual pace of US data center construction in August 2026, up 73% in a year.

US Census Bureau

11.8M

US homes passed by new fiber in 2025, a record year.

Fiber Broadband Association

87%

US contractors with open hourly craft jobs in mid-2026.

AGC 2026 Workforce Survey

4–6 mo

Minimum time to train a locating tech to full competence.

NULCA

85%

Scanning and locating websites in our audit that show no price at all.

Clevra audit of 101 firms

3%

Let a client pick a date and time slot online.

Clevra audit of 101 firms

EXECUTIVE SUMMARY

Five things owners should take from this

1 The work is moving to big sites.

Data center construction is running at an \$85 billion annual pace, up 73% in a year, while total US construction is down. Fiber builders passed a record 11.8 million homes in 2025. Homeowner remodeling is flat. Firms that sell to GCs, electrical subs and utilities have the wind at their backs.

2 Every repair dollar comes with nearly \$16 of other losses.

CGA's new model puts damage to US buried utilities at \$83.2 billion a year. Fixing the line is only 5.9% of it; for every repair dollar, nearly \$16 more is lost elsewhere. That gap is why clients pay for certainty, and why the written record of a scan matters as much as the paint.

3 Locating is short on people, not only on accuracy.

Four locating and marking failures caused 27.4% of 2024 damages, and excavators faced a 38% chance of a late start waiting on locates. A new tech takes four to six months to train, and 87% of US contractors have craft jobs open.

4 Most of the market still sells by phone.

Of the 101 company websites we checked, 85% show no price, 10% state a minimum charge and 3% let a client book a time online. Only 13 say when the report will arrive. The firms that make buying easy stand out without spending a dollar more on ads.

5 Cash is the quiet constraint.

92% of subcontractors floated payroll at some point last year while waiting to get paid, and 43% waited over 90 days for final payment and retainage. Invoice the day you scan, attach the report and take cards on small jobs.

THE ONE-LINE VERSION

The work is moving to big sites that want three things: a price they can plan around, a crew that shows up when it said, and a record that holds up later. Most scanning firms' websites don't show a price, and few say when the crew will arrive or when the record will land.

01 • DEMAND

Where the work is coming from

Total US construction spending is down from a year ago. The jobs that need scanning aren't. Data centers, fiber and the grid are pulling demand toward big commercial and infrastructure sites.

Data centers: the biggest single pull

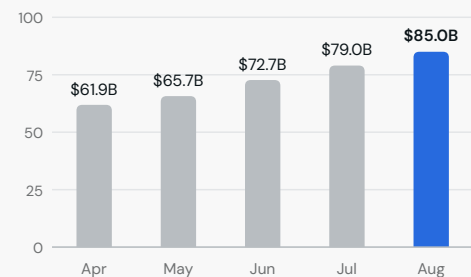
In August 2026, US data center construction ran at an annual pace of **\$85.0 billion**, up 73.2% on a year earlier.¹ Over the same year, total construction spending slipped 1.7% to about \$2.2 trillion.¹ Data centers are climbing while the total shrinks.

For scanning crews, that matters more than the headline suggests. A data center slab is packed with conduit, embeds and rebar, and it gets cored, saw-cut and anchored over and over as electrical and cooling gear goes in. Every penetration is a chance to hit something live. The site work outside is no different: duct banks, grounding grids, fiber and new gas and power feeds, all going into ground that's already crowded.

The labor side shows the same pull. In the AGC's 2026 workforce survey, 28% of contractors had worked on a data center project in the past year, and 58% of those reporting an effect said it raised competition for skilled workers.²

Data center construction, 2026

US spending, seasonally adjusted annual rate, \$ billions



Source: US Census Bureau, construction spending release for August 2026 (revised April to July).¹

The split market

Data center spending: **+73.2%** year over year. All US construction: **-1.7%**. If your customer list is mostly homeowners and small remodels, you're selling into the flat part of the market.

Where scanning shows up on a data center build

Site work

Private locates and utility mapping before grading, duct banks and new power and gas feeds.

Slab and structure

Scans before every core, saw cut and anchor once the concrete is in and the conduit is buried in it.

Fit-out

Electrical and cooling gear brings new penetrations for months. The same site books you again and again.

Later phases

New data halls go in next to live ones. A miss now cuts power to a running building.

Fiber and BEAD: miles of new trench

US fiber builders passed **11.8 million homes** in 2025, a record, taking total fiber-to-the-home passings to about 98.3 million and over 60% of households.³ The federal BEAD program adds **\$42.45 billion** on top, with major construction expected from 2026 through 2030.⁴ One industry panelist put 90 to 95% of BEAD money into outside plant: the cable, conduit and handholes that go in the ground or on poles.⁵

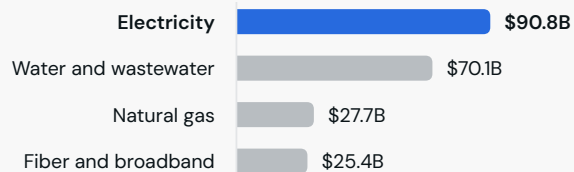
That cuts both ways. Telecom and cable lines were already **51% of all buried-utility damage reports** in 2025.⁶ More fiber means more work locating existing lines before the bore, and more new lines for everyone else to find later.

The grid, gas and water

FMI sizes the US utility services market at **\$214.0 billion** in 2026, growing to \$282.8 billion by 2030.⁷ Electric work is the biggest piece. CGA points to \$1.4 trillion of planned grid modernization for 2026 to 2030.⁸ Each of those programs starts with someone finding what's already buried.

US utility services spending by segment, 2026

\$ billions, FMI estimate



Source: FMI, Utility Services sector brief, February 2026. Total \$214.0B in 2026, \$282.8B by 2030.⁷

Homes: steady, not growing

Harvard's Joint Center for Housing Studies expects US homeowner improvement and repair spending of about **\$519 billion** by mid-2027, with growth slowing to 0.5%.⁹ Residential coring, sprinkler and sewer-lateral locates and backyard projects will hold up. They won't be where the growth is.

What this means for a five-tech shop

Your next big customer is probably a GC or an electrical sub, not a homeowner. Commercial and infrastructure work is where the volume is moving.

Big sites buy with paperwork. Insurance certificates, safety prequalification (ISNetworld, Avetta, COR), written scopes and net terms. Have them ready before the bid, not after.

One site, many trips. A data center or fiber build means repeat visits for months. Price and schedule it as a program, not a string of one-off calls.

\$85B

data center construction pace, Aug 2026¹

11.8M

homes passed by new fiber in 2025³

\$42.45B

federal BEAD broadband program⁴

\$282.8B

US utility services market by 2030⁷

02 • DAMAGE AND LIABILITY

The cost of a miss

Damage to buried lines is at a record high, and CGA now prices it at \$83.2 billion a year. The repair bill is the smallest part of it.

\$83.2B

yearly cost of damage
to US buried utilities

\$227M+

every day

668,999

damage incidents
modeled for 2025

In August 2026, CGA published a first-of-its-kind estimate of what utility strikes cost the US: **\$83.2 billion a year**, nearly triple the \$30 billion benchmark it used from 2019.⁸ The study modeled 668,999 incidents in 2025 and followed the money past the repair crew: lost business, emergency response, injuries, evacuations, environmental cleanup.⁸

The headline for anyone selling scanning or locating is the ratio. Direct repair is **5.9%** of the total. For every dollar spent fixing the line, nearly \$16 is lost somewhere else.⁸ Most of that lands on people who were never on site: the business that loses its phones for a day, the block without gas, the city rerouting traffic.

That's why owners, GCs and insurers keep raising the bar on who they let near a slab or a trench, and what paperwork they expect afterward.

Where the \$83.2 billion goes

Cost of buried-utility damage in the US, 2025 model, \$ billions



Source: CGA, Between the Lines: The True Cost of Damages to America's Buried Utilities, August 2026. Shares: 39.2%, 38.0%, 9.4%, 7.5%, 5.9%.⁸

\$1 : \$16

repair cost to other losses, per CGA's 2025 model⁸



One dollar fixes the line. Nearly sixteen more go to lost business, emergency response, injuries, cleanup and the community around the site. Those sixteen are what a client is really paying a scanning crew to prevent.

Damages are tracking construction, not improving

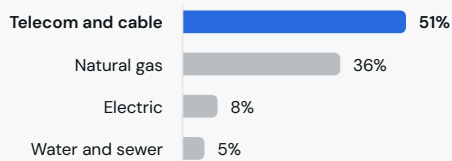
CGA's 2025 data summary counted **221,717 unique damage reports**. Its damage index hit a record 102, eight points worse than 2023, rising in step with construction activity.⁶ The top ten root causes made up 86% of all damages, and that list barely moves from year to year.⁶

The excavator who never called 811 is still the biggest single cause.¹⁰ Locating is right behind. In the 2024 data, the four root causes tied to locating and marking (a locator missed the line, marked it in the wrong place, never showed up, or worked from a bad map) added up to **27.4% of all damages**.¹⁰

Late locates show up in the schedule, too. Across eight 811 centers, excavators had an average **38% chance** of not being able to start on time because locate responses weren't complete.¹⁰ Every one of those delays is a crew standing around and a GC looking for someone faster.

What got hit in 2025

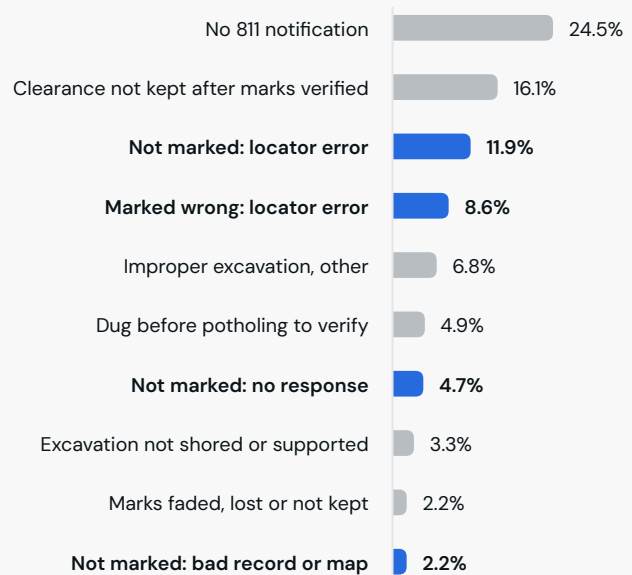
Share of buried-utility damage reports by facility type



Source: CGA, 2025 DIRT Data Summary & Trends, July 2026.⁶

Top 10 root causes of damage, 2024

Share of all damages. Blue: the four tied to locating and marking (27.4% combined).



Source: CGA, 2024 DIRT Report, as reported by Underground Infrastructure, September 2025. The top ten add up to 85.1%.¹⁰

38%

chance of a late start,
waiting on locates

On time is a selling point

Public locates run on a legal clock that excavators can't speed up. A private locator or scanning crew that books fast and shows up when it said it would is solving the GC's schedule problem as well as a safety one. Say that in your sales pitch: when you can be on site, how fast the marks and the report follow, and what you'll do if the site isn't ready.

The lines 811 won't mark

Public 811 locators mark the utility's lines up to the meter. Past that, the property owner is on the hook. Texas 811 spells it out: member utilities can't mark private lines, and the owner pays to protect water and sewer laterals, private lighting, sprinklers, fire mains and the feed to a detached garage.¹¹

That gap is the private locator's market. How big is it? Nobody counts it officially. One industry estimate, from the largest private locating firm, puts private underground lines at about 20 million miles, roughly matching the public network.¹² Treat that as a vendor's estimate, not a census, but it shows why GCs hire private crews even when 811 has already painted the street.

Inside the slab

Concrete scanning has its own failure modes: a cut post-tension tendon, a live conduit, a core through rebar in a beam. The Concrete Sawing & Drilling Association's best practice for work in GPR-scanned slabs (CSDA-BP-026) deals directly with the method's limits and with liability.¹³

The practical lesson is the same on both sides of the business. Every scan has limits, from depth and congestion to metal decking.¹⁴ Our view: those limits belong in writing, handed over with the marks. Telling whoever happens to be standing nearby doesn't count.

The standard clients are starting to write into contracts

ASCE 38-22 grades how much you can trust a utility's location, from records alone (D) up to a line you've physically exposed and measured (A).¹⁶ Public owners are building it into scopes. Colorado law has required engineers on public projects to meet ASCE 38 and aim for Quality Level B since 2018.¹⁷ In May 2026, MassDOT told its SUE consultants to follow ASCE 38-22 and its own CAD standards, with deliverables sealed by a licensed engineer or surveyor.¹⁸

QL-D

Records. Utility maps and as-builts. Nobody went to site.

QL-C

Records plus what you can see. Valves, manholes and pedestals surveyed and tied to the maps.

QL-B

Designated. Located with geophysical tools such as EM and GPR, then marked and surveyed.

QL-A

Exposed. Potholed or test-pitted, measured for depth and position.

Quality levels as defined in ASCE 38-22 and summarized by FHWA.¹⁶

Your report is your record

When something gets hit, the first question is what the scan said. A record that holds up usually shows:

- The area scanned, with a photo of the marks in place
- Equipment and method used
- What was found, and the color code used
- What couldn't be cleared, and why
- Depth and site limits, in plain words
- Who received it, when, and their sign-off

03 • WORKFORCE

The people who read the screen

A GPR unit is only as good as the person reading it. That person takes months to train, and every other trade on the job is hiring too.

Everyone is short

AGC's 2026 workforce survey heard from 1,830 people across construction firms in July and August. **87%** had open hourly craft positions, and 88% of those said the jobs were as hard or harder to fill than a year ago.² Worker shortages were the most common cause of project delays, named by 42%.²

Scanning and locating firms hire from the same pool as electricians, fiber crews and survey shops, and data centers are bidding it up. Of the contractors who said data center work affected them, 58% saw more competition for skilled workers and 49% saw wage pressure.²

Four to six months before they're on their own

The National Utility Locating Contractors Association (NULCA) puts the time to train a locating tech to full competence at **four to six months at minimum**.^{19 20} You can't hire your way out of a spring rush in March.

CGA's research with more than 400 locate techs found the same pressures years ago: not enough people, relatively low pay, and turnover that follows the seasons.²¹ The pressure hasn't eased since.

The real cost of turnover

A new tech spends months working beside someone senior before they can sign a report alone.¹⁹ Lose them in month five and you've paid for two people on one truck and get to start again in the busy season.

What the job pays, from public postings

Advertised pay, not a survey. Treat as a starting point.

ROLE	PAY
Utility line locator, largest US contract locator ²²	\$20.48/hr avg
GPR project manager, largest US private locating firm, after paid training ²³	\$65K–\$75K/yr
Concrete scanning tech, 1 to 2 years' experience, Burnaby BC ²⁵	CAD \$38/hr
Concrete scanning trainee, Burnaby and Calgary ²⁴	CAD \$27.50/hr

US locator average from 22 postings on Indeed, updated August 2026. Project manager pay includes monthly bonus and a company vehicle.

87%

of US contractors had open hourly craft jobs in mid-2026

AGC 2026 Workforce Survey²

A ticket is not a unit of work

Most of the industry still measures locating by ticket count, and NULCA argues that's the root of the staffing problem. In one dataset it reviewed, a single ticket covered an area the size of more than 8,000 football fields and still came with the same 48 hours as a residential backyard.¹⁹

Renewals inflate the count further. In California, NULCA says 40% of ticket volume is renewals, extending existing marks for another 28 days without anyone checking them in the field.²⁰

CGA's locator research made the same point: one ticket might be a front lawn, the next two kilometres of city street, so ticket volume alone can't tell you how many people you need.²¹

Private work has the same trap

Private locating and concrete scanning don't run on 811 tickets, but the trap is the same: counting calls instead of hours. A "quick scan for two cores" on a fourth-floor slab with no elevator is half a day. A 5,000 sq ft area scan with a written report is a day in the field plus time at a desk.

The firms that staff well size the job before they book it: area, access, depth, deliverable. That's a scoping question, and it belongs on the request form, not in the third phone call.

What's working for owners

Hire for judgment

Equipment can be taught. The habit of saying "I can't clear this" out loud can't. Pair new techs with a senior for their first full season.

Write the house rules down

How you call a target, how you mark an unknown, what goes in every report. A two-page standard turns one good tech into five consistent ones.

Measure jobs, not calls

Track hours per job type: area scans, core layouts, private locates. Use it to price, staff and spot the jobs that quietly lose money.

Pay for the credential

Certification costs less than turnover. Tie a raise to it and you keep the person you just spent six months training.

Fill the slow months

Interior concrete work, facility mapping and maintenance contracts keep winter busy so you don't lose people every fall.

Protect the tech's day

Every call a tech takes on site is time not scanning. Route requests, rescheduling and payment questions to the office.

Six questions that size a job before you book it

- How big is the area, and is it marked out?
- Slab on grade, elevated, post-tensioned, or open ground?
- Access: floor, elevator, working hours, escorts?
- What's being cut, cored or dug, and how deep?
- Marks only, a PDF report, or CAD and KMZ files?
- When does the core rig or excavator arrive?

04 • PRICING AND SELLING

What 101 company websites tell a buyer

We checked how independent scanning and locating firms in the US and Canada present themselves online: what they charge, how you book them and what you get at the end.

Buying still starts with a phone call

Almost every firm has a web form: 86% do. What happens next is a callback. Only 3 of the 101 let a client pick a date and time online, and 14% advertise a text line or chat. Plenty of forms ask for a preferred date, then promise that someone will call to confirm it.

Price is the bigger gap. **85% of sites show no price of any kind**, not even a minimum. Just 7 firms publish real rates, and 8 more give a partial signal such as a two-hour minimum or a typical job range.²⁶ Instead, 36% promise a free estimate.

Speed is claimed more than promised

39% mention emergency or after-hours work, but only 37% put a number or a day on how fast they respond. About a third of those promises are about answering the inquiry ("within 24 hours", "same business day"); the rest give a visit or scheduling window, usually same day, next day or within 24 hours, often hedged with "typically" or "when available".²⁶ One firm contradicts itself: 24/7 on the homepage, by appointment only on the contact page.

That's room to stand out. A super comparing three firms at 6 a.m. can't tell from most of these websites what a visit costs, when someone can come or what they'll get at the end. The firm that answers those three questions on the page has already won the first sales call.

What buyers can find on the website

Share of 101 scanning and locating company websites, October 2026



Source: Clevra website audit, October 2026. "Found" means we saw it on the company's own site.²⁶

O4 · PRICING AND SELLING

What the firms that publish prices charge

15 of the 101 sites in our audit show some kind of price. Here's what they say, by region, as published in October 2026. It's a snapshot of the firms willing to post rates, not a market average.²⁶

FIRM, REGION	WHAT THE WEBSITE SAYS
Locator, Colorado	\$150/hr with a 2-hour minimum (\$300). Travel fee outside the metro area.
Locator and scanner, Colorado	Flat packages: \$245 quick mark, \$345 residential, \$595 site package. Same-day adds \$245. Travel tiers past 30 miles.
Scanner and locator, Utah	\$200/hr with a \$400 minimum.
Locator and scanner, Oregon	\$175/hr utility locating, \$250/hr concrete scanning, 2-hour minimum. Travel billed by distance.
Scanner and coring, Washington	\$600 for the first 3 hours, then \$180 to \$200/hr. \$1,675 day rate. \$75 mobilization. Night work +25%.
Locator, Illinois	\$235 for a basic locate, \$335 for a GPR locate, \$75 to \$100 for each extra line.
Ranges and flat prices	\$500 to \$2,000 a project (Tennessee). \$650 to \$1,750 a typical job (Washington). \$700 to \$2,100 a day, residential, and a \$700 flat scan sold in a web store (Florida).

\$150–\$250

published hourly rates for locating and concrete scanning

2 hours

the usual minimum. 10 firms state one, and most of those use two hours.

A market guide agrees

One 2026 cost guide puts GPR concrete scanning at about \$1,000 to \$3,000 a day, or hourly with a 2-hour minimum, and utility mapping at \$1,000 to \$5,000 a day depending on site density.¹⁵

Four ways the market charges

Hourly plus minimum

The most common published model. The minimum pays for the drive and setup.

Half and full day

Better for big sites and repeat visits. One firm posts \$1,675 a day.

Flat packages

Residential locates sold like a menu: \$245, \$345, \$595.

Per project

A range by scope, set after the scoping call.

Extras are where margins hide: travel and mobilization fees, time and a half or double time after hours, same-day surcharges, and in a few cases the written report itself, sold as an add-on.²⁶

What a price page can say

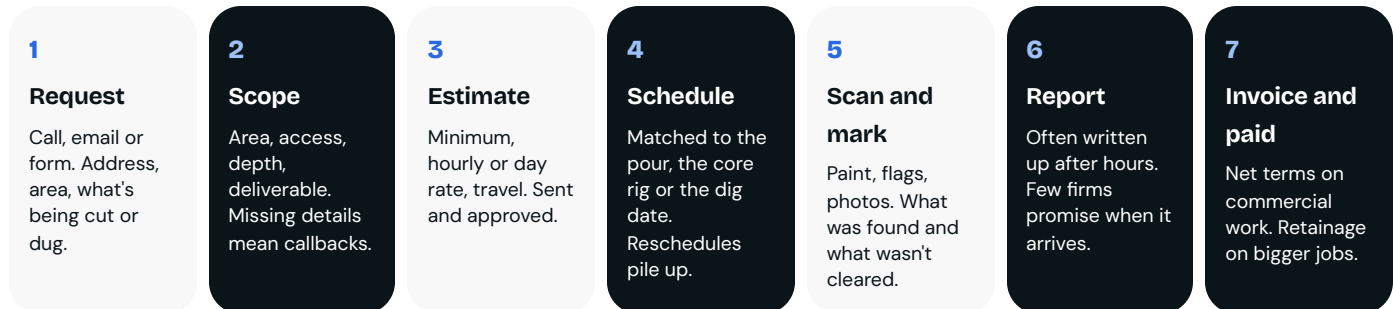
You don't have to post every rate. Post enough that the right client calls and the wrong one doesn't. Example structure, with your own numbers:

- Minimum visit and what it covers
- Half-day and full-day rates
- What's in the report, and when it arrives
- What you need from the client first
- Hourly rate after the minimum
- Travel zones or mobilization
- After-hours and same-day terms
- How to pay, and when

05 · RUNNING THE JOB

From request to paid

A scan takes a few hours. The job around it, from the first call to the money in the bank, can take months. Here's where the time goes.



Dark steps: where time and money most often leak, based on the patterns in this report. Not survey data.

Paint is the default. The report sets you apart.

71% of the sites in our audit mention marks on the ground or slab, and 53% mention a written or PDF report. 32% offer CAD, GIS or KMZ files, mostly firms that also sell utility mapping or SUE.²⁶

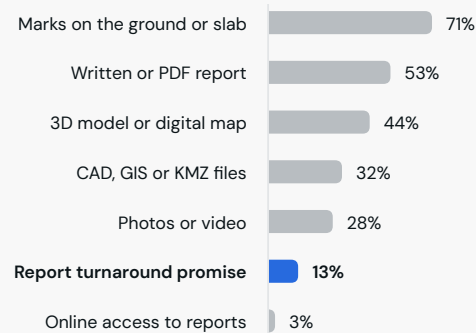
Very few put a clock on it. Just 13 of 101 say when the written report arrives, and 6 promise it the same day or before the tech leaves site. Only 3 of 101 give clients online access to their reports.²⁶

Canadian firms are ahead here: 14 of 17 mention a written or digital report and 6 put a time on it, against 48% and 8% of US firms. Small sample, clear pattern.

The report is what the client keeps after the paint wears off. When something gets hit, it's the first thing everyone asks for.

What clients are told they'll get

Share of 101 scanning and locating websites mentioning each



Source: Clevra website audit, October 2026.²⁶

Getting paid is the slowest step

Most scanning and locating work on commercial sites is subcontract work, and subcontractors finance a lot of the job. Sitaline's 2026 survey of 492 construction finance and operations people found **92% of subcontractors** covered payroll from their own money at some point in the past year while waiting to be paid; 28% did it most months.²⁷

The tail is long. **43%** of subcontractors waited more than 90 days for final payment and retainage, against 15% of general contractors. Nearly one in five waited six months or more.²⁷ The biggest internal cause of late payment they named: pay applications sent with errors or missing pieces.²⁷

Scanning firms usually bill smaller tickets than a mechanical sub, but they bill a lot of them, and a missing PO number or an invoice without the report attached sends the whole thing to the back of an accounts payable queue.

What shortens the wait

- **Invoice the day you scan.** Not at the end of the month. The job is fresh, the super remembers you, and the report goes out with it.
- **Attach the proof.** Report, photos and sign-off travel with the invoice, so nobody can hold it for "backup."
- **Take cards for small jobs.** A homeowner or small contractor is far more likely to pay a \$450 minimum from a link today than to mail a check this week.
- **Ask for a deposit on big programs.** Multi-week data center or fiber work deserves a mobilization payment.
- **Chase on a schedule.** A reminder at 7 days overdue beats a phone call at 60.

A same-day close-out

Before you leave

Photos of the marks, notes on what couldn't be cleared, client sign-off.

Same day

Report and photos sent, with the invoice and the PO number on it.

Pay link

Card payment for small jobs. Net terms only where they're agreed upfront.

Day 7 overdue

An automatic reminder, then a call. Not a call at day 60.

92%

of subcontractors floated payroll at least once in the past year while waiting to be paid

Sitaline, State of Subcontractor Billing 2026²⁷



43%

waited more than 90 days for final payment and retainage (GCs: 15%)

67%

spend 11 or more hours a month on pay applications

Sitaline 2026²⁷

CANADA SPOTLIGHT

Different rules, same pressure

Canada runs its locate systems province by province, and Ontario just rewrote its rules. The results are worth watching on both sides of the border.

Ontario: free locates and a clock

Since May 2024, Ontario law bars infrastructure owners from charging for locates, and large-project locates get 10 business days instead of five.²⁸ The province also created a dedicated locator option, starting with designated broadband projects: one locator marks every owner's lines on the site.³⁰ Contractor groups backed it so crews stop waiting on five, six or eight different locators.²⁹

The early numbers are good. Ontario One Call handled **1,027,026 locate requests** in 2025. On-time delivery reached **85.9%**, up from a 67% baseline in 2024, and it logged about 33,000 dedicated locator requests.³¹ It also fielded 41,073 requests for clarification, a reminder of how often the request itself is the problem.³¹ From October 1, 2026, the regulator operates as the Ontario Dig Authority.³¹

Alberta: almost all online

Utility Safety Partners handled **430,803 locate requests** in Alberta in 2025 and sent more than 1.6 million notifications to members. Over 98% of member and contractor requests and 55% of homeowner requests came in online.³²

The national picture

Canada has no current national cost figure. The last one, from the Canadian Common Ground Alliance's 2018 DIRT report, put the cost of damage to underground infrastructure at no less than CAD \$1 billion a year, with damage reporting voluntary.³³ Given what CGA's new US model found, that number is almost certainly low.

For Canadian scanning firms

Free public locates in Ontario don't touch private lines, and dedicated locator projects favour firms that can cover a whole site with one crew and one record. In our audit, Canadian firms were more likely than US firms to promise a written report (14 of 17). On price they look the same: 16 of 17 show none, against 70 of 84 US firms.²⁶

Working both sides of the border

The paperwork changes at the line. In our audit, 2 of the 7 Canadian firms offering SUE or mapping cite CSA S250 alongside ASCE 38, and the only safety program Canadian firms show is COR (2 of 17), with no ISNetworld or Avetta. Prices are in CAD, and Ontario's dedicated locator projects come with their own rules. A firm that wants cross-border work should have both sets of paperwork ready.²⁶

1.03M

Ontario locate requests, 2025

Ontario One Call³¹

85.9%

delivered on time, from 67% in 2024

Ontario One Call³¹

430,803

Alberta locate requests, 2025

Utility Safety Partners³²

WHAT'S CHANGING IN THE TOOLS

Better records first, AI second

The technology story for 2027 isn't a new radar. It's what happens to the data after the scan: who keeps it, in what format, and how fast it gets to the client.

Digital records are becoming the deliverable

Public owners are moving from paper as-builts to digital ones. Colorado's DOT, for one, builds its utility program on ASCE 38-22 for investigation and ASCE 75-22 for recording and exchanging utility data, and keeps the results in a live dashboard.¹⁷ Expect more scopes to ask for files a client can load into their own CAD or GIS, on top of paint on the ground and a PDF.

In our audit, 32% of firms mention CAD, GIS or KMZ files and 44% mention 3D models or digital maps of some kind. Only 10 cite ASCE 38.²⁶ That's the next line between the firms that win engineering work and the ones that don't.

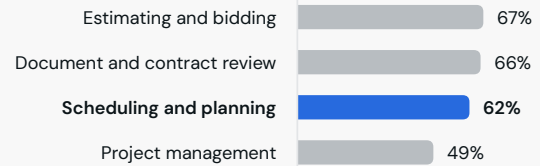
AI is arriving through the office

Contractors expect AI to change paperwork long before it changes field work. In AGC's 2026 survey, the areas they expect AI to affect most over five years are estimating and bidding (67%), document and contract review (66%) and scheduling and planning (62%).²

Early results are mixed. Among commercial service contractors already using AI, 59% report a positive impact but only 15% a significant one with clear ROI. Asked where AI will matter most, the top answer was scheduling and dispatch, named by 37%.³⁴

Where contractors expect AI to matter most

Share of US contractors naming each area, next five years



Source: AGC, 2026 Workforce Survey Analysis.²

Our read

Reading a radargram well is still a human skill, and it should be: the liability sits with the person who signs the report. The near-term wins are around that person. Faster scoping, cleaner scheduling, reports written up the same day and invoices that go out with them. Firms that fix the office first will feel the shortage least.

Before you pay for any AI tool

- Does it work from your own jobs, estimates and invoices, or from generic data?
- Can you see where every number it gives you came from?
- Will it save office hours this month, not next year?
- Who signs off on anything it sends to a client?

ACTION LIST

Ten moves for 2027

Pulled from the data in this report. None of them need new equipment.

01 Put a price on your website

A minimum charge and an hourly or day range filter out tire-kickers and tell a GC you're easy to work with. Only 15% of the firms we checked show any price.

02 Make the request form do the scoping

Ask for area, slab or ground, access, depth, what's being cut or dug, and the deliverable needed. Fewer callbacks, better estimates.

03 Sell the deliverable, not the visit

Spell out what the client gets: marks, photos, a PDF report, CAD or KMZ files. 53% of the sites we checked mention a written or PDF report.

04 Promise a report time and keep it

Same day or next morning is a reason to pick you. Just 13 of the 101 sites we checked say when the report arrives.

05 Get prequalified before the big bids

Insurance certificates, a written safety program, ISNetworld or Avetta, COR in Canada. Data center and utility work buys from approved vendor lists.

06 Price programs, not calls

Multi-visit sites need a rate sheet, a mobilization fee and a clear minimum per visit, agreed before the first trip.

07 Track hours by job type

Area scans, core layouts and private locates eat time differently. Know which ones make money and which ones only feel busy.

08 Write down your house rules

How you call a target, mark an unknown and word a limitation. It protects the tech, the client and the company.

09 Train in pairs and pay for the credential

Four to six months to full competence is too long to lose to turnover. Tie a raise to certification.

10 Invoice the day you scan

Send the report, photos and invoice together, take cards on small jobs and set reminders for anything overdue.

Start with two. Pick the two moves that would have saved you the most trouble last month, give each one an owner and a date, and check back in 30 days.

METHODOLOGY

How we did the website audit

Who we included. Independent companies whose main business is concrete scanning (GPR or X-ray), private utility locating, or both. We searched by city and trade term in six regions (five in the US, one covering Canada) and used each company’s own website, not directory listings. When a site wouldn’t load, we replaced the company rather than guess.

Who we left out. GPRS, the largest national firm, so one brand wouldn’t shape the totals. Also 811 contract locators, one-call centres, utility-owned locate teams, equipment makers and dealers, and engineering firms where scanning is a side line. Where a brand had several locations, we counted it once.

What we recorded. For each site we read the home, services, pricing, FAQ and contact or booking pages and logged the same fields: services offered, whether and how prices are shown, minimum charges, free-estimate wording, request forms, online booking, text or chat, after-hours service, response-time and report-turnaround promises, deliverables, standards and safety programs, and online report access.

How to read the numbers. Each percentage is the share of all 101 sites where we found the item. If a company offers something but doesn’t say so on its website, it counts as not found. That’s on purpose: we’re measuring what a buyer sees before they pick up the phone, not what a firm can do. A website check can’t tell us revenue, crew size or close rates, so we don’t guess at them.

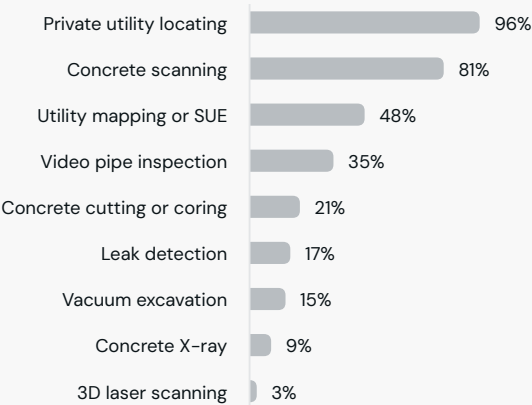
Limits. 101 sites is a sample, not a census. It covers 38 US states and 6 provinces; some smaller states and provinces have no firm in it. Search engines favour firms that put work into their websites, so the sample probably leans toward firms that market more than average. If anything, the real share of firms showing prices, booking and clear deliverables is lower than what we found. Percentages are rounded to whole numbers. The checks ran on October 21, 2026.

The sample

Companies checked	101
In the US	84
In Canada	17
US states covered	38
Canadian provinces covered	6
Multi-location firms	24%
Median services listed	3

Services offered

Share of the 101 firms listing each service



SOURCES

Where every number comes from

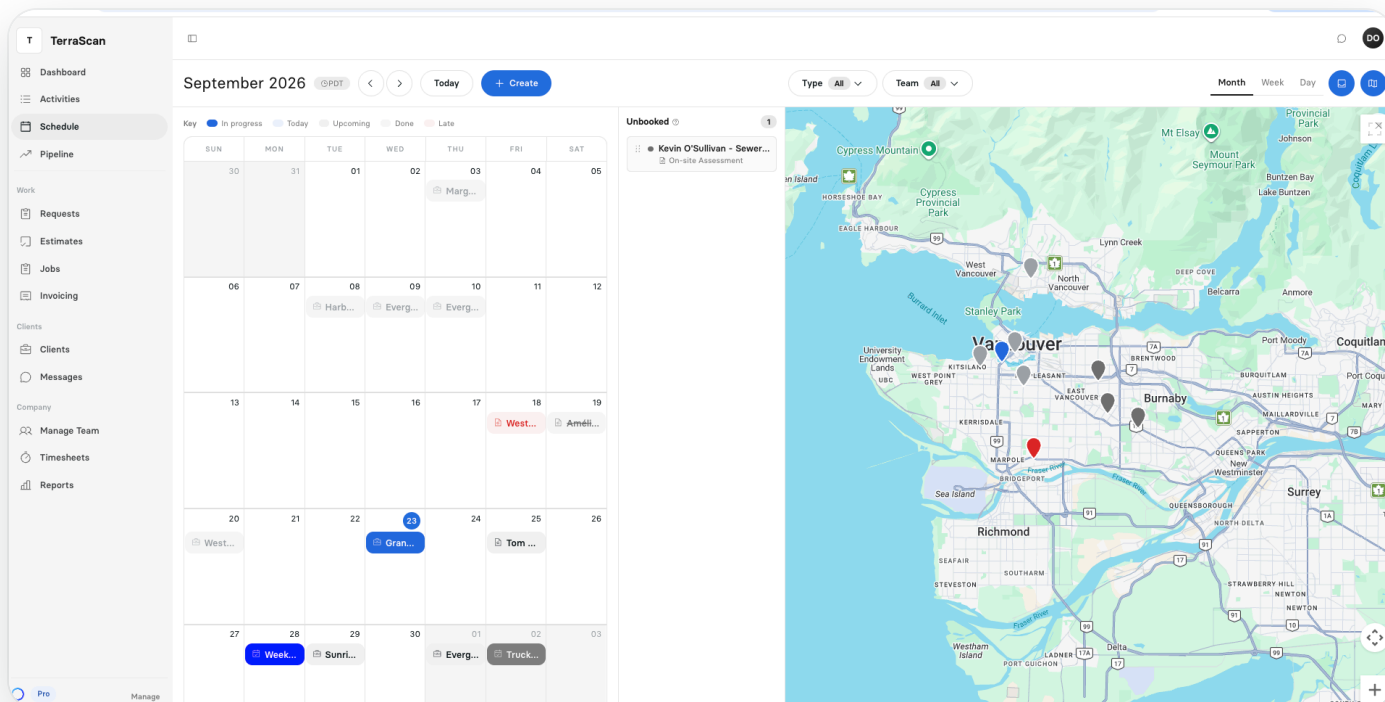
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All web sources accessed between October 20 and 21, 2026. Figures are reported as published; where a source revised a number, we used the latest revision. This report is for general information and isn't legal, engineering or financial advice.

ABOUT CLEVRA

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Clevra is field service software built for inspection and scanning crews. The request comes in, the office sends the estimate and books it, the tech does the work, and the client gets invoiced and pays online.



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