

TABLE OF CONTENTS

1	Executive Summary
2	Global Construction Industry Dynamics – Senior-Level Respondents
2.1	Global Construction Industry Senior-Level Respondents – Revenue Growth Expectations
2.1.1	Global construction industry senior-level respondents – revenue growth expectations by region
2.1.2	Global construction industry senior-level respondents – revenue growth expectations by company turnover
2.2	Global Construction Industry Senior-Level Respondents – Key Priorities
2.2.1	Global construction industry senior-level respondents – key priorities by region
2.2.2	Global construction industry senior-level respondents – key priorities by company turnover
2.3	Global Construction Industry Senior-Level Respondents – Merger and Acquisition Activity Expectations
2.3.1	Global construction industry senior-level respondents – M&A activity expectations by region
2.3.2	Global construction industry senior-level respondents – M&A activity expectations by company turnover
2.4	Global Construction Industry Senior-Level Respondents – Capital Expenditure Estimation
2.4.1	Global construction industry senior-level respondents – projection of capital expenditure by region
2.4.2	Global construction industry senior-level respondents – projection of capital expenditure by company turnover
2.5	Global Construction Industry Senior-Level Respondents – Planned Change in Staff Recruitment Activity
2.5.1	Global construction industry senior-level respondents – planned change in staff recruitment activity by region
2.5.2	Global construction industry senior-level respondents – planned change in staff recruitment activity by company turnover
3	Global Construction Industry Market Growth Outlook – Senior-Level Respondents
3.1	Global Construction Industry Senior-Level Respondents – Demand in Emerging Markets
3.1.1	Global construction industry senior-level respondents – demand in emerging markets by region
3.1.2	Global construction industry senior-level respondents – demand in emerging markets by company turnover
3.2	Global Construction Industry Senior-Level Respondents – Growth Expectations in Developed Countries
3.2.1	Global construction industry senior-level respondents – growth expectations in developed countries by region
3.2.2	Global construction industry senior-level respondents – growth expectations in developed countries by company turnover
4	Threats and Opportunities – Global Construction Industry Senior-Level Respondents

- 4.1 Global Construction Industry Senior-Level Respondents – Leading Business Concerns
 - 4.1.1 Global construction industry senior-level respondents – leading business concerns by region
 - 4.1.2 Global construction industry senior-level respondents – leading business concerns by company turnover
- 4.2 Global Construction Industry Senior-Level Respondents – Key Supplier Actions to Maintain and Secure Buyer Business
 - 4.2.1 Global construction industry senior-level respondents – actions to maintain and secure buyer business by region
 - 4.2.2 Global construction industry senior-level respondents – actions to maintain and secure buyer business by company turnover
- 4.3 Global Construction Industry Senior-Level Respondents – Key Variations in Operational Costs
 - 4.3.1 Global construction industry senior-level respondents – key variations in operational costs by region
 - 4.3.2 Global construction industry senior-level respondents – key variations in operational costs by company turnover
- 4.4 Global Construction Industry Senior-Level Respondents – Impact of Costs on Product Pricing
- 5 Global Construction Industry Buyer Expenditure Activity – Senior-Level Respondents
 - 5.1 Global Construction Industry Senior-Level Respondents – Annual Procurement Budgets
 - 5.1.1 Global construction industry senior-level respondents – revenue growth vs. procurement budget
 - 5.1.2 Global construction industry senior-level respondents – annual procurement budgets by region
 - 5.1.3 Global construction industry senior-level respondents – annual procurement budgets by company turnover
 - 5.2 Global Construction Industry Senior-Level Respondents – Planned Change in Procurement Expenditure
 - 5.2.1 Global construction industry senior-level respondents – planned change in procurement expenditure by region
 - 5.2.2 Global construction industry senior-level respondents – planned change in procurement expenditure by company turnover
 - 5.3 Global Construction Industry Senior-Level Respondents – Planned Changes in Procurement Expenditure by Product and Service Category
 - 5.4 Global Construction Industry Senior-Level Respondents – Variations in Regional Supplier Prices
 - 5.4.1 Global construction industry senior-level respondents – variations in regional supplier prices by region
 - 5.4.2 Global construction industry senior-level respondents – variations in regional supplier prices by company turnover
- 6 Global Construction Industry Procurement Behaviors and Strategies – Senior-Level Respondents
 - 6.1 Global Construction Industry Senior-Level Respondents – Critical Success Factors

for Supplier Selection

6.2 Global Construction Industry Senior-Level Respondents – Future Procurement Objectives

6.2.1 Global construction industry senior-level respondents – future procurement objectives by region

6.2.2 Global construction industry senior-level respondents – future procurement objectives by company turnover

6.3 Global Construction Industry Senior-Level Respondents – E-Procurement

6.3.1 Global construction industry senior-level respondents – e-procurement by region

6.3.2 Global construction industry senior-level respondents – e-procurement by turnover

7 Global Construction Industry – Suppliers’ Marketing Expenditure Activity by Senior-Level Respondents

7.1 Global Construction Industry Senior-Level Respondents – Annual Marketing Budgets

7.1.1 Global construction industry senior-level respondents – annual marketing budgets by region

7.1.2 Global construction industry senior-level respondents – annual marketing budgets by company turnover

7.2 Global Construction Industry Senior-Level Respondents – Planned Change in Marketing Expenditure Levels

7.2.1 Global construction industry senior-level respondents – planned change in marketing expenditure by region

7.2.2 Global construction industry senior-level respondents – planned change in marketing expenditure by turnover

7.2.3 Global construction industry senior-level respondents – planned change in marketing expenditure levels by revenue growth expectations

7.3 Global Construction Industry Senior-Level Respondents – Future Investment in Media Channels

7.3.1 Global construction industry senior-level respondents – future investment in media channels by region

7.3.2 Global construction industry senior-level respondents – future investment in media channels by turnover

7.4 Global Construction Industry Senior-Level Respondents – Future Investment in Marketing and Sales Technology

7.4.1 Global construction industry senior-level respondents – planned investment in marketing and sales technologies by region

7.4.2 Global construction industry senior-level respondents – planned investment in marketing and sales technologies by turnover

8 Global Construction Industry Senior Level-Respondents – Marketing and Sales Behaviors and Strategies

8.1 Global Construction Industry Senior-Level Respondents – Key Marketing Aims by Senior-Level Respondents

8.1.1 Global construction industry senior-level respondents – key marketing aims by region

8.1.2 Global construction industry senior-level respondents – key marketing aims by turnover

8.2 Global Construction Industry Senior-Level Respondents – Key Amendments to

Marketing Agencies in 2013

8.2.1 Global construction industry senior-level respondents – key amendments to marketing agencies in 2013 by region

8.2.2 Global construction industry senior-level respondents – key amendments to marketing agencies in 2013 by turnover

8.3 Global Construction Industry Senior-Level Respondents – Best Uses of New Media for Business Prospects

8.3.1 Global construction industry senior-level respondents – best uses of new media for business prospects by region

8.3.2 Global construction industry senior-level respondents – best uses of new media for business prospects by turnover

8.4 Global Construction Industry Senior-Level Respondents – Critical Factors for Choosing a Marketing Agency

8.4.1 Global construction industry senior-level respondents – critical factors for choosing a marketing agency by turnover

9 Appendix

9.1 What is this Report About?

9.2 Definitions

9.3 Methodology

9.4 Profile of Survey Respondents

9.5 Contact Timetric

9.6 About Timetric

9.7 Timetric's Services

9.8 Disclaimer

LIST OF TABLES

- Table 1: Global Construction Industry Senior-Level Respondents – Revenue Growth Optimism (%), 2013
- Table 2: Global Construction Industry Senior-Level Respondents – Revenue Growth Optimism by Region (%), 2013
- Table 3: Global Construction Industry Senior-Level Respondents – Revenue Growth Optimism by Turnover (%), 2013
- Table 4: Global Construction Industry – Key Priorities by Senior-Level Respondents (%), 2013–2014
- Table 5: Global Construction Industry – Senior-Level Respondents Key Priorities by Region (%), 2013–2014
- Table 6: Global Construction Industry – M&A Activity Forecast by Senior-Level Respondents (%), 2013–2014
- Table 7: Global Construction Industry – Senior-Level Respondents M&A Activity Forecast by Region (%), 2013–2014
- Table 8: Global Construction Industry – Senior-Level Respondents M&A Activity Forecast by Turnover (%), 2013–2014
- Table 9: Global Construction Industry – Capital Expenditure Estimation by Senior-Level Respondents (%), 2013–2014
- Table 10: Global Construction Industry – Senior-Level Respondents’ Capital Expenditure Estimation by Region (% Increase), 2013–2014
- Table 11: Global Construction Industry – Senior-Level Respondents Capital Expenditure Estimation by Turnover (% Increase), 2013–2014
- Table 12: Global Construction Industry – Planned Change in Staff Recruitment Activity by Senior-Level Respondents (%), 2013–2014
- Table 13: Global Construction Industry – Senior-Level Respondents’ Planned Change in Staff Recruitment Activity by Region (%), 2013–2014
- Table 14: Global Construction Industry – Senior-Level Respondents’ Planned Change in Staff Recruitment Activity by Turnover (%), 2013–2014
- Table 15: Global Construction Industry – Demand in Emerging Markets by Senior-Level Respondents (%), 2013–2014
- Table 16: Global Construction Industry Senior-Level Respondents – Growth Expectations in Developed Countries (%), 2013–2014
- Table 17: Global Construction Industry Senior-Level Respondents – Growth Expectations in Developed Countries by Region (% Increase), 2013–2014
- Table 18: Global Construction Industry Senior-Level Respondents – Leading Business Concerns (%), 2013–2014
- Table 19: Global Construction Industry Senior-Level Respondents – Leading Business Concerns by Region (%), 2013–2014
- Table 20: Global Construction Industry Senior-Level Respondents – Securing Buyer Business (%), 2013
- Table 21: Global Construction Industry Senior-Level Respondents – Securing Buyer Business by Turnover (%), 2013
- Table 22: Global Construction Industry Senior-Level Respondents – Key Variation in Operational Costs (%), 2013–2014

Table 23: Global Construction Industry Senior-Level Respondents – Key Variation in Operational Costs (%), 2013–2014 by Region (%), 2013–2014

Table 24: Global Construction Industry Senior-Level Respondents – Annual Procurement Budgets in US\$ (%), 2013

Table 25: Global Construction Industry Senior-Level Respondents – Increase in Revenue Growth vs. Procurement Budget (%), 2013

Table 26: Global Construction Industry Senior-Level Respondents – Annual Procurement Budgets in US\$ by Region (%), 2013

Table 27: Global Construction Industry Senior-Level Respondents – Planned Change in Procurement Expenditure (%), 2013

Table 28: Global Construction Industry Senior-Level Respondents – Planned Change in Procurement Expenditure by Region (%), 2013

Table 29: Global Construction Industry Senior-Level Respondents – Change in Expenditure by Product and Service Category (%), 2013

Table 30: Global Construction Industry Senior-Level Respondents – Variations in Regional Supplier Prices (%), 2013

Table 31: Global Construction Industry Senior-Level Respondents – Variations in Regional Supplier Prices by Region (%), 2013

Table 32: Global Construction Industry Senior-Level Respondents – Variations in Regional Supplier Prices by Turnover (%), 2013

Table 33: Global Construction Industry Senior-Level Respondents – Future Procurement Objectives (%), 2013

Table 34: Global Construction Industry Senior-Level Respondents – Future Procurement Objectives by Region (%), 2013

Table 35: Global Construction Industry Senior-Level Respondents – Future Procurement Objectives by Turnover (%), 2013

Table 36: Global Construction Industry Senior-Level Respondents – E-Procurement, Level of Implementation (%), 2013

Table 37: Global Construction Industry Senior-Level Respondents – E-Procurement, Level of Implementation by Region (%), 2013

Table 38: Global Construction Industry – Annual Marketing Budgets by Senior-Level Respondents (%), 2013

Table 39: Global Construction Industry Senior-Level Respondents – Annual Marketing Budgets by Region (%), 2013

Table 40: Global Construction Industry Senior-Level Respondents – Annual Marketing Budgets by Turnover (%), 2013

Table 41: Global Construction Industry – Planned Change in Marketing Expenditure by Senior-Level Respondents (%), 2013

Table 42: Global Construction Industry Senior-Level Respondents – Planned Change in Marketing Expenditure by Turnover (%), 2013

Table 43: Global Construction Industry Senior-Level Respondents – Planned Change in Marketing Expenditure Levels by Revenue Growth Expectations (%), 2013

Table 44: Global Construction Industry – Future Investment in Media Channels by Senior-Level Respondents (%), 2013

Table 45: Global Construction Industry Senior-Level Respondents – Future Investment in Media Channels by Region (% Increase Responses), 2013

Table 46: Global Construction Industry Senior-Level Respondents – Future Investment in Media Channels by Turnover (% Increase Responses), 2013

Table 47: Global Construction Industry Senior-Level Respondents – Planned Investment in Marketing and Sales Technologies (%), 2013

Table 48: Global Construction Industry Senior-Level Respondents – Planned Investment in Marketing and Sales Technologies by Region (%), 2013

Table 49: Global Construction Industry – Key Marketing Aims by Senior-Level Respondents (%), 2013

Table 50: Global Construction Industry Senior-Level Respondents – Key Marketing Aims by Region (%), 2013

Table 51: Global Construction Industry Senior-Level Respondents – Key Marketing Aims by Turnover (%), 2013

Table 52: Global Construction Industry – Key Amendments to Marketing Activities by Senior-Level Respondents (%), 2013–2014

Table 53: Global Construction Industry Senior-Level Respondents – Key Amendments to Marketing Activities by Region (%), 2013–2014

Table 54: Global Construction Industry Senior-Level Respondents – Key Amendments to Marketing Activities by Turnover (%), 2013–2014

Table 55: Best Uses of New Media – Global Construction Industry Senior-Level Respondents (%), 2013

Table 56: Global Construction Industry Senior-Level Respondents – Best Uses of New Media by Region (%), 2013

Table 57: Global Construction Industry Senior-Level Respondents – Best Uses of New Media by Turnover (%), 2013

Table 58: Critical Success Factors – Global Construction Industry Senior-Level Respondents (%), 2013

Table 59: Critical Success Factors by Turnover – Global Construction Industry Senior-Level Respondents (%), 2013

Table 60: Survey Results – Closed Questions

Table 61: Global Construction Industry – Senior-Level Respondents by Company Type, 2013

Table 62: Global Construction Industry – Senior-Level Respondents by Company Turnover (%), 2013

Table 63: Global Construction Industry – Senior-Level Respondents by Region (%), 2013

List of figures

Figure 1: Global Construction Industry Senior-Level Respondents – Revenue Growth Optimism (%), 2013

Figure 2: Global Construction Industry Senior-Level Respondents – Revenue Growth Optimism by Region (%), 2013

Figure 3: Global Construction Industry – Key Priorities by Senior-Level Respondents (%), 2013–2014

Figure 4: Global Construction Industry – Senior-Level Respondents Key Priorities by Region (%), 2013–2014

Figure 5: Global Construction Industry – Senior-Level Respondents Key Priorities by

Turnover (%), 2013

Figure 6: Global Construction Industry – M&A Activity Forecast by Senior-Level Respondents (%), 2013–2014

Figure 7: Global Construction Industry – Senior-Level Respondents M&A Activity Forecast by Region (%), 2013–2014

Figure 8: Global Construction Industry – Senior-Level Respondents M&A Activity Forecast by Turnover (%), 2013–2014

Figure 9: Global Construction Industry – Capital Expenditure Estimation by Senior-Level Respondents (%), 2013–2014

Figure 10: Global Construction Industry – Senior-Level Respondents' Capital Expenditure Estimation by Region (% Increase), 2013–2014

Figure 11: Global Construction Industry – Senior-Level Respondents Capital Expenditure Estimation by Turnover (% Increase), 2013–2014

Figure 12: Global Construction Industry – Planned Change in Staff Recruitment Activity by Senior-Level Respondents (%), 2013–2014

Figure 13: Global Construction Industry – Senior-Level Respondents' Planned Change in Staff Recruitment Activity by Region (%), 2013–2014

Figure 14: Global Construction Industry – Senior-Level Respondents' Planned Change in Staff Recruitment Activity by Turnover (%), 2013–2014

Figure 15: Global Construction Industry Senior-Level Respondents – Top Ten Growth Regions, 2013

Figure 16: Global Construction Industry – Top Five Emerging Markets by Senior-Level Respondents (%), 2013–2014

Figure 17: Global Construction Industry – Demand in Emerging Markets by Senior-Level Respondents (%), 2013–2014

Figure 18: Global Construction Industry Senior-Level Respondents – Demand in Emerging Markets by Region (%), 2013–2014

Figure 19: Global Construction Industry Senior-Level Respondents – Demand in Emerging Markets by Turnover (%), 2013–2014

Figure 20: Global Construction Industry – Top Five Developed Markets by Senior-Level Respondents (%), 2013–2014

Figure 21: Global Construction Industry Senior-Level Respondents – Growth Expectations in Developed Countries (%), 2013–2014

Figure 22: Global Construction Industry Senior-Level Respondents – Growth Expectations in Developed Countries by Turnover (% Increase), 2013–2014

Figure 23: Global Construction Industry Senior-Level Respondents – Leading Business Concerns (%), 2013–2014

Figure 24: Global Construction Industry Senior-Level Respondents – Leading Business Concerns (%), 2013–2014

Figure 25: Global Construction Industry Senior-Level Respondents – Leading Business Concerns by Turnover (%), 2013–2014

Figure 26: Global Construction Industry Senior-Level Respondents – Securing Buyer Business (%), 2013

Figure 27: Global Construction Industry Senior-Level Respondents – Securing Buyer Business by Region (%), 2013

Figure 28: Global Construction Industry Senior-Level Respondents – Key Variation in

Operational Costs (%), 2013–2014

Figure 29: Global Construction Industry Senior-Level Respondents – Key Variation in Operational Costs by Region (%), 2013–2014

Figure 30: Global Construction Industry Senior-Level Respondents – Key Variation in Operational Costs by Turnover (%), 2013–2014

Figure 31: Global Construction Industry Senior-Level Respondents – Impact of Changing Costs on Product Pricing (%), 2013

Figure 32: Global Construction Industry Senior-Level Respondents – Annual Procurement Budgets in US\$ (%), 2013

Figure 33: Global Construction Industry Senior-Level Respondents – Annual Procurement Budgets in US\$ by Region (%), 2013

Figure 34: Global Construction Industry Senior-Level Respondents – Annual Procurement Budgets in US\$ by Turnover (%), 2013

Figure 35: Global Construction Industry Senior-Level Respondents – Planned Change in Procurement Expenditure (%), 2013

Figure 36: Global Construction Industry Senior-Level Respondents – Planned Change in Procurement Expenditure by Region (%), 2013

Figure 37: Global Construction Industry Senior-Level Respondents – Planned Change in Procurement Expenditure by Turnover (%), 2013

Figure 38: Global Construction Industry Senior-Level Respondents – Change in Expenditure by Product and Service Category (%), 2013

Figure 39: Global Construction Industry Senior-Level Respondents – Variations in Regional Supplier Prices (%), 2013

Figure 40: Global Construction Industry Senior-Level Respondents – Variations in Regional Supplier Prices by Region (%), 2013

Figure 41: Global Construction Industry Senior-Level Respondents – Variations in Regional Supplier Prices by Turnover (%), 2013

Figure 42: Global Construction Industry Senior-Level Respondents – Critical Success Factors for Supplier Selection, 2013

Figure 43: Global Construction Industry Senior-Level Respondents – Future Procurement Objectives (%), 2013

Figure 44: Global Construction Industry Senior-Level Respondents – Future Procurement Objectives by Region (%), 2013

Figure 45: Global Construction Industry Senior-Level Respondents – Future Procurement Objectives by Turnover (%), 2013

Figure 46: Global Construction Industry Senior-Level Respondents – E-Procurement, Level of Implementation (%), 2013

Figure 47: Global Construction Industry Senior-Level Respondents – E-Procurement, Level of Implementation by Region (%), 2013

Figure 48: Global Construction Industry Senior-Level Respondents – E-Procurement, Level of Implementation by Turnover (%), 2013

Figure 49: Global Construction Industry – Annual Marketing Budgets by Senior-Level Respondents (%), 2013

Figure 50: Global Construction Industry Senior-Level Respondents – Annual Marketing Budgets by Region (%), 2013

Figure 51: Global Construction Industry Senior-Level Respondents – Annual Marketing

Budgets by Turnover (%), 2013

Figure 52: Global Construction Industry – Planned Change in Marketing Expenditure by Senior-Level Respondents (%), 2013

Figure 53: Global Construction Industry Senior-Level Respondents – Planned Change in Marketing Expenditure by Region (%), 2013

Figure 54: Global Construction Industry Senior-Level Respondents – Planned Change in Marketing Expenditure by Turnover (%), 2013

Figure 55: Global Construction Industry – Future Investment in Media Channels by Senior-Level Respondents (%), 2013

Figure 56: Global Construction Industry Senior-Level Respondents – Planned Investment in Marketing and Sales Technologies (%), 2013

Figure 57: Global Construction Industry Senior-Level Respondents – Planned Investment in Marketing and Sales Technologies by Region (%), 2013

Figure 58: Global Construction Industry Senior-Level Respondents – Planned Investment in Marketing and Sales Technologies by Turnover (%), 2013

Figure 59: Global Construction Industry – Key Marketing Aims by Senior-Level Respondents (%), 2013

Figure 60: Global Construction Industry Senior-Level Respondents – Key Marketing Aims by Region (%), 2013

Figure 61: Global Construction Industry Senior-Level Respondents – Key Marketing Aims by Turnover (%), 2013

Figure 62: Global Construction Industry – Key Amendments to Marketing Activities by Senior-Level Respondents (%), 2013–2014

Figure 63: Best Uses of New Media – Global Construction Industry Senior-Level Respondents (%), 2013

Figure 64: Global Construction Industry Senior-Level Respondents – Best Uses of New Media by Region (%), 2013

Figure 65: Global Construction Industry Senior-Level Respondents – Best Uses of New Media by Turnover (%), 2013

Figure 66: Critical Success Factors by Turnover – Global Construction Industry Senior-Level Respondents (%), 2013