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## Image and reputation study 2019



**ALWAYS  
READY TO TALK**

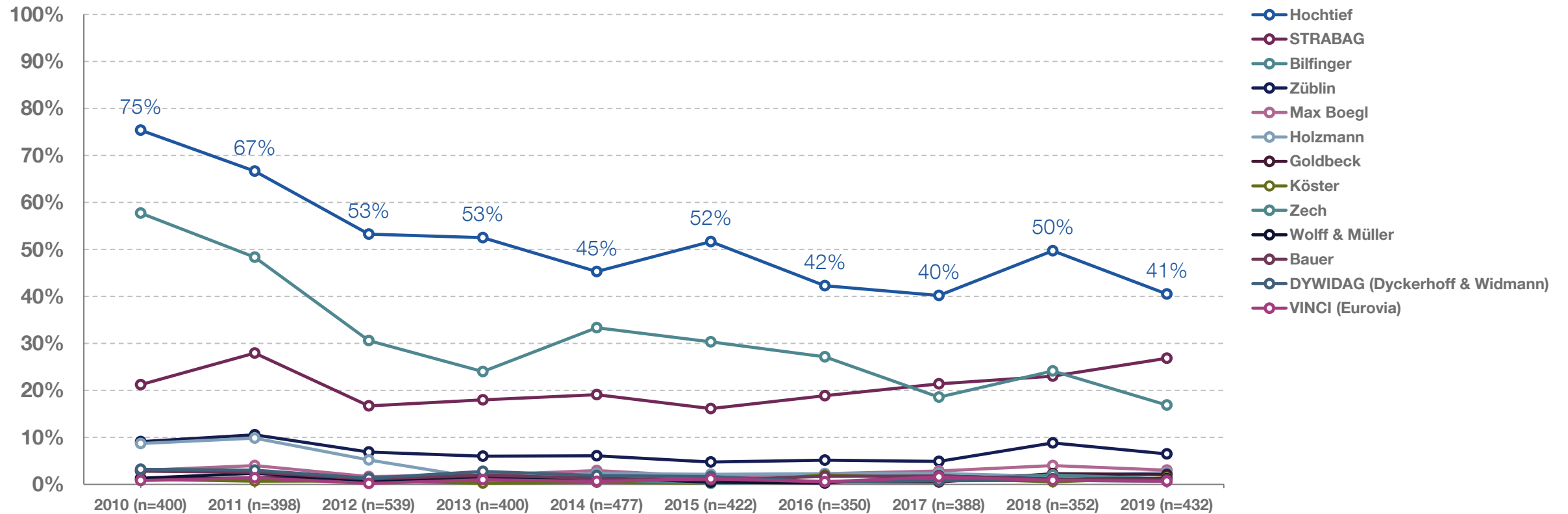
Results 2019

## Background and objective

- Since 2009, YouGov has performed an image and reputation survey on behalf of HOCHTIEF among decision-makers from enterprises.
- The survey is performed online.
- The survey period was in November 2019.
- It is an objective of the study to gain information on how HOCHTIEF is perceived in the relevant target group of the decision-makers and what potential for development is seen in different fields of activity.

# HOCHTIEF remains the most well-known construction company in Germany. Unprompted awareness: Four out of ten respondents name HOCHTIEF.

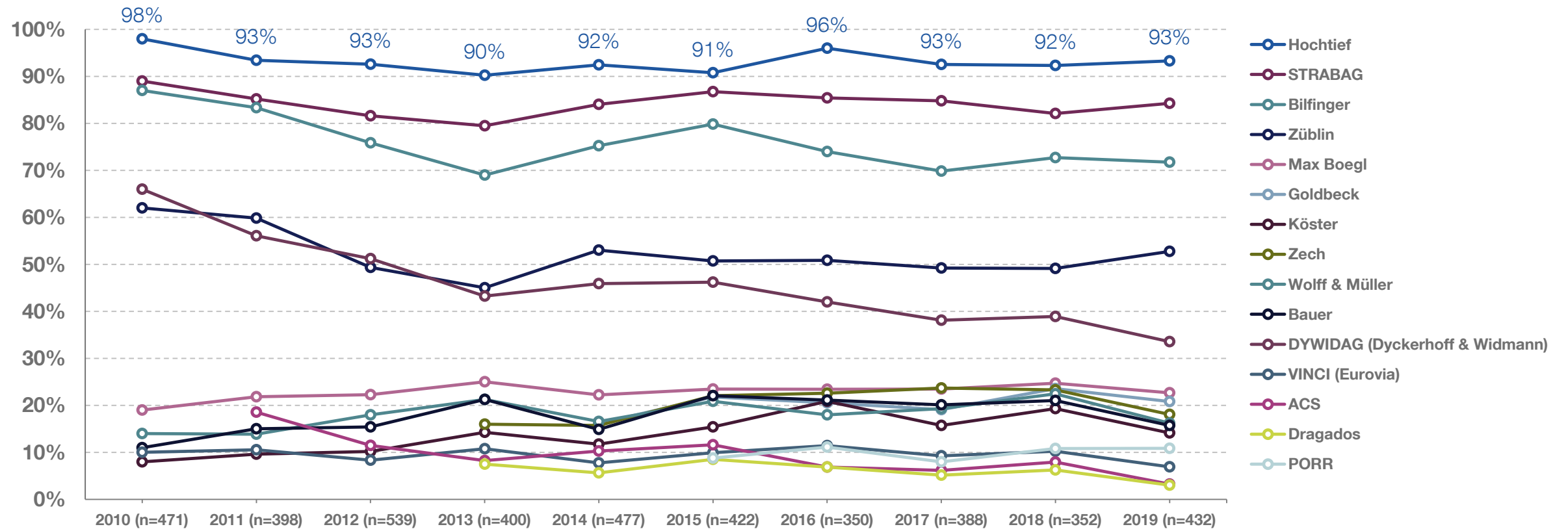
Question: "If you think of a major company in Germany, which one do you think of first in the area of 'construction'?"



Basis: Gross random sample

## Aided awareness: More than nine out of ten respondents know HOCHTIEF. Name recognition remains stable throughout the decade.

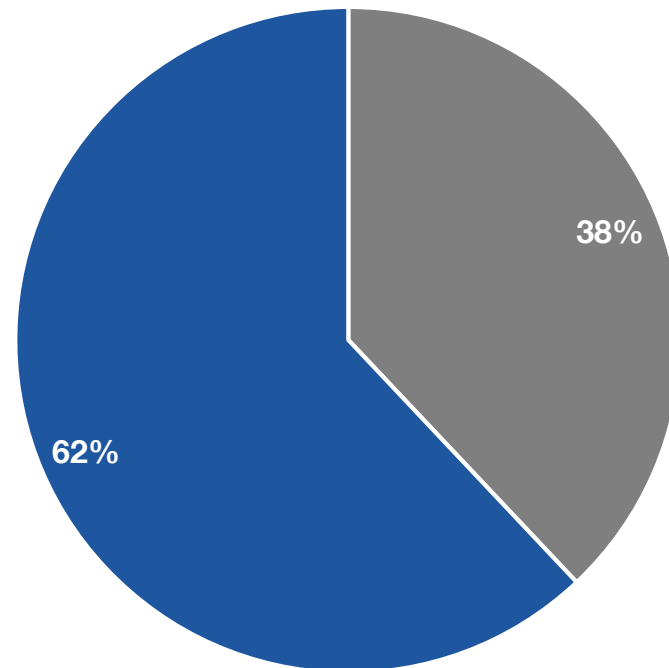
Some companies from the “construction industry“ segment are listed below. Please specify which of these companies you know, if only by name.



Basis: Gross random sample

## Brand awareness: High proportion of qualified individuals know HOCHTIEF

Which of the following statements is applicable to you?



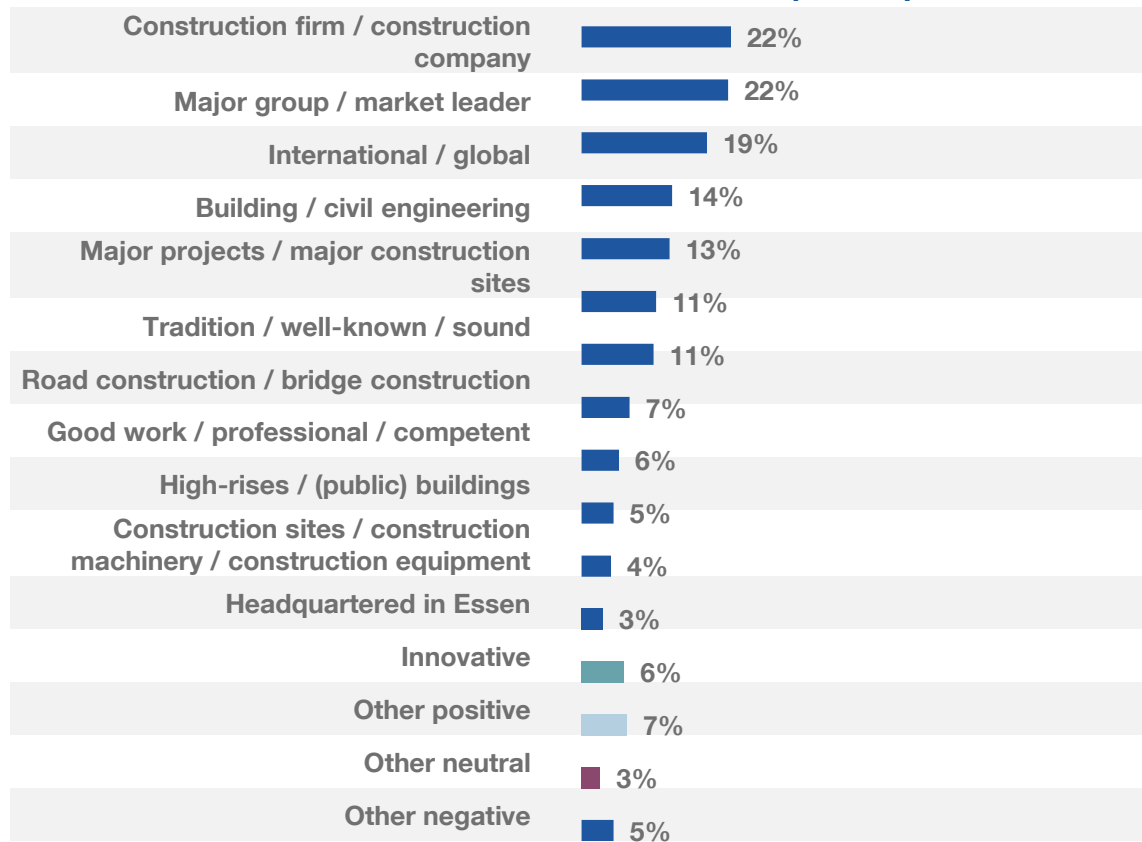
- I know HOCHTIEF only by name, but cannot associate anything at all with the company.
- I recognize more than just the name HOCHTIEF, and have a good idea of the company in my head.

Basis: Gross random sample, filtered by interviewees who at least know HOCHTIEF by name (n=403)

## Core business, size, market leadership and internationality characterize associations with HOCHTIEF.

Question: “If you think of the company HOCHTIEF, what comes to your mind?”

### HOCHTIEF (n=250)

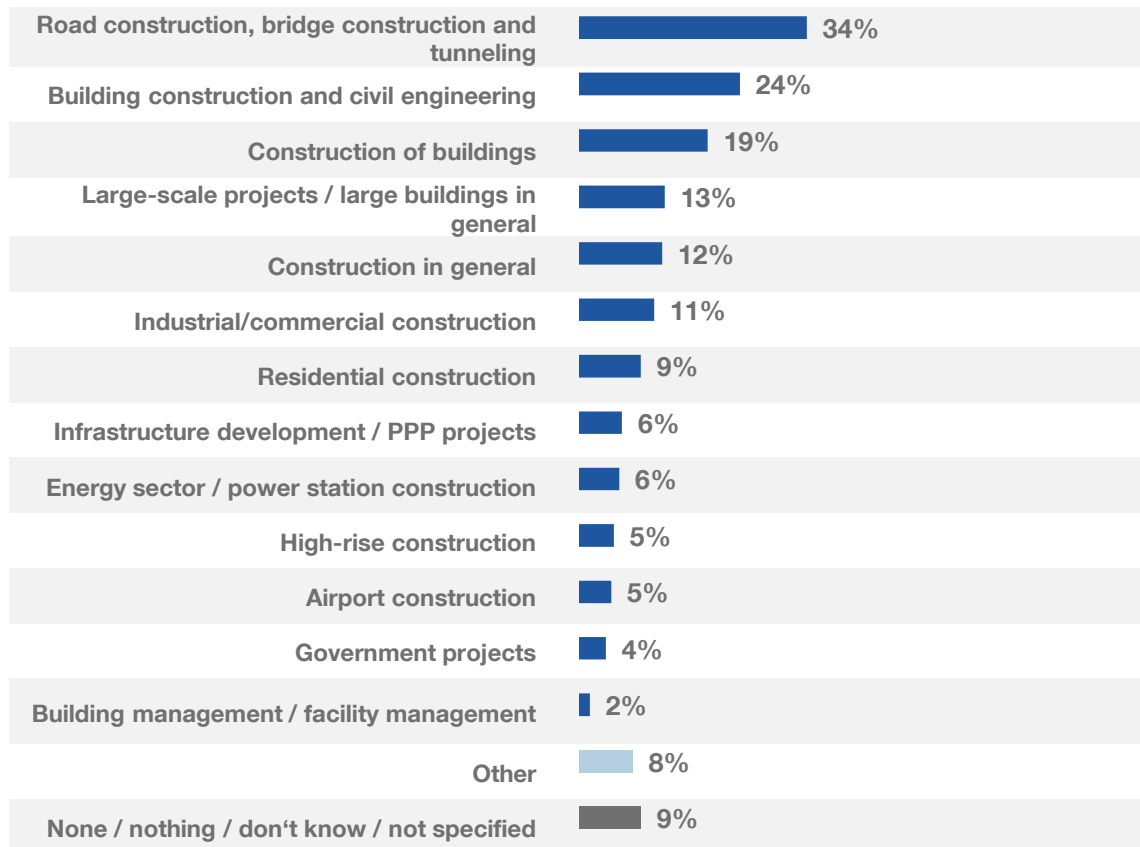


Basis: Net random sample, open question, multiple answers possible, Top 12 depicted

## HOCHTIEF is perceived as a diversified construction company.

Question: “In your opinion, what special areas does HOCHTIEF still operate in?”

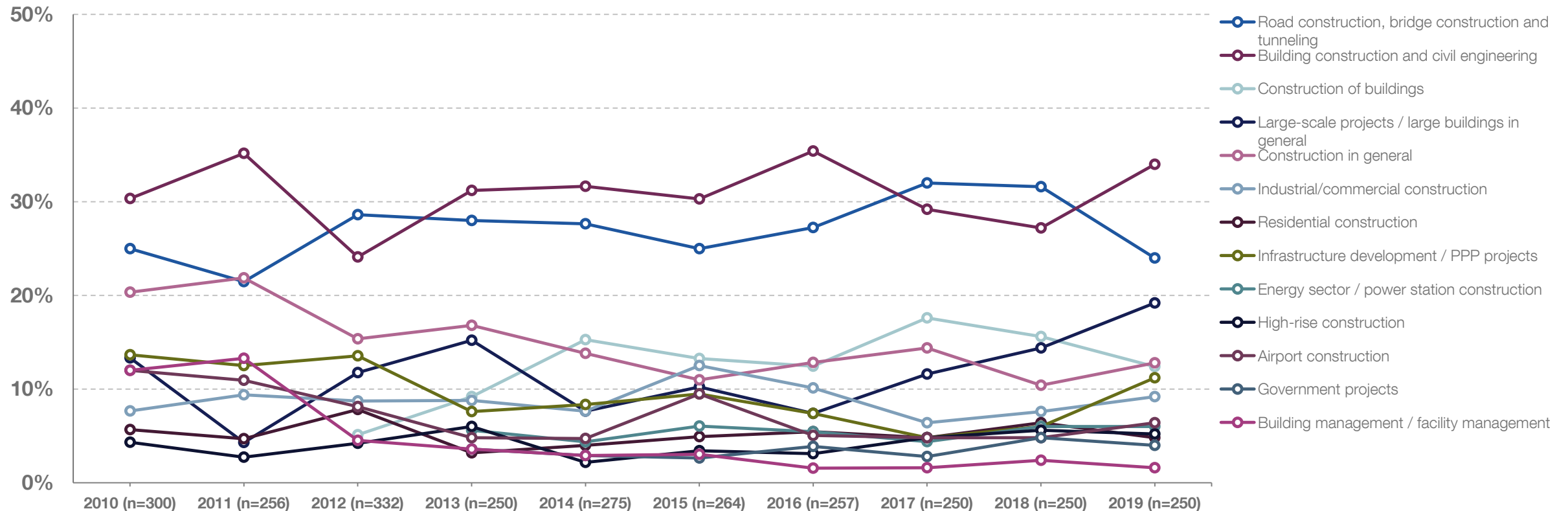
### HOCHTIEF (n=250)



Basis: Net random sample, open question, multiple answers possible, Top 13 depicted

# Time comparison shows: HOCHTIEF is increasingly being perceived as a company for major construction projects.

Question: "In your opinion, what special areas does HOCHTIEF still operate in?"



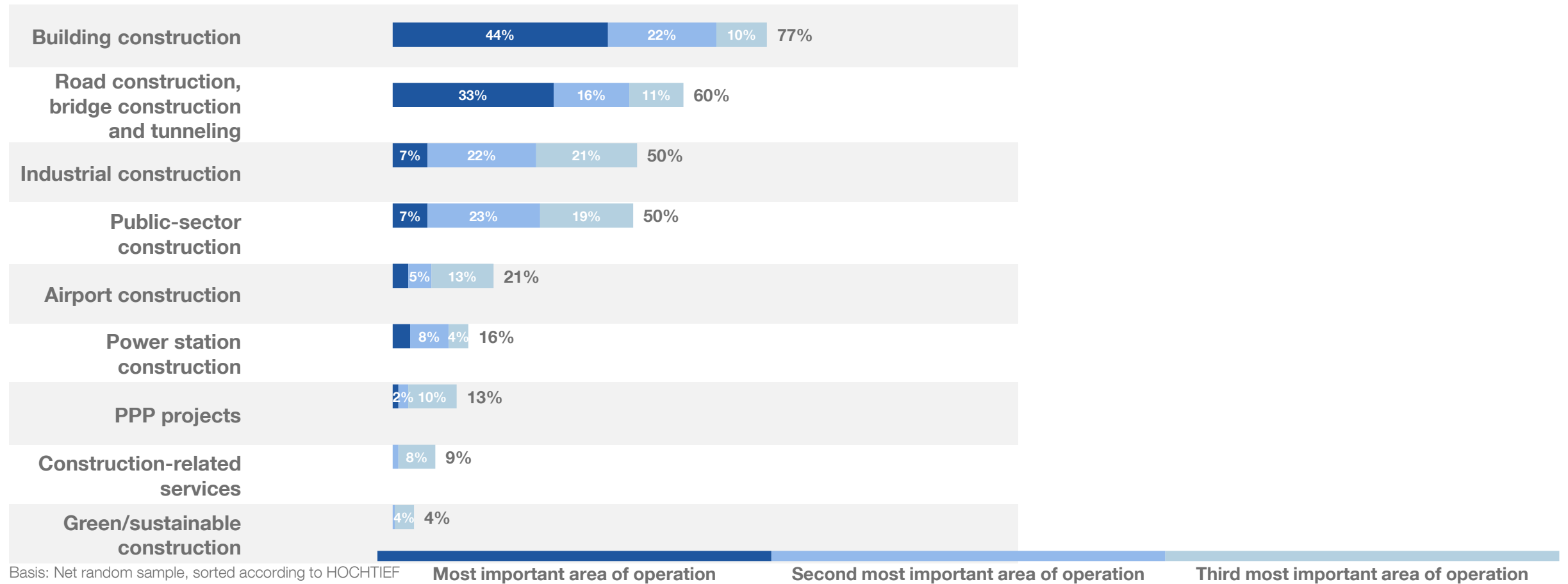
Basis: Net random sample, open question, multiple answers possible, Top 13 depicted (Top 2 Boxes)



## Building construction and road construction are evaluated as the most relevant areas of operation.

Question: “In your opinion, what are HOCHTIEF’s three most important areas of operation?”

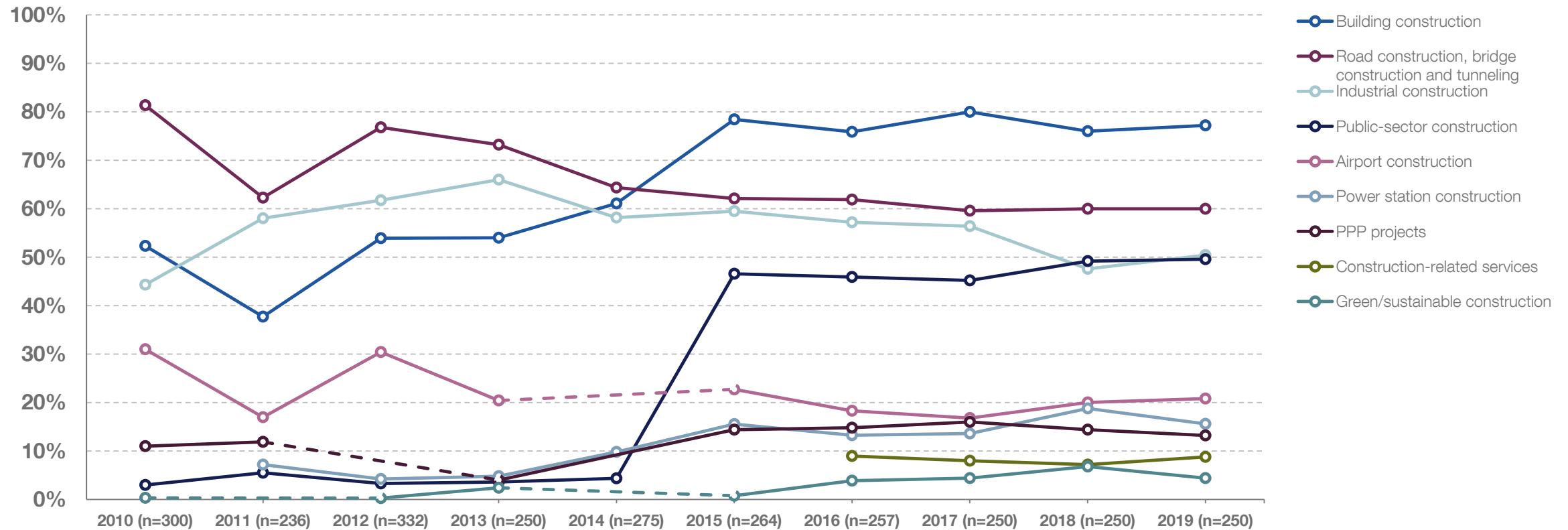
HOCHTIEF (n=250)



Basis: Net random sample, sorted according to HOCHTIEF

# Building construction and public-sector construction have increasingly gained relevance in people's perceptions.

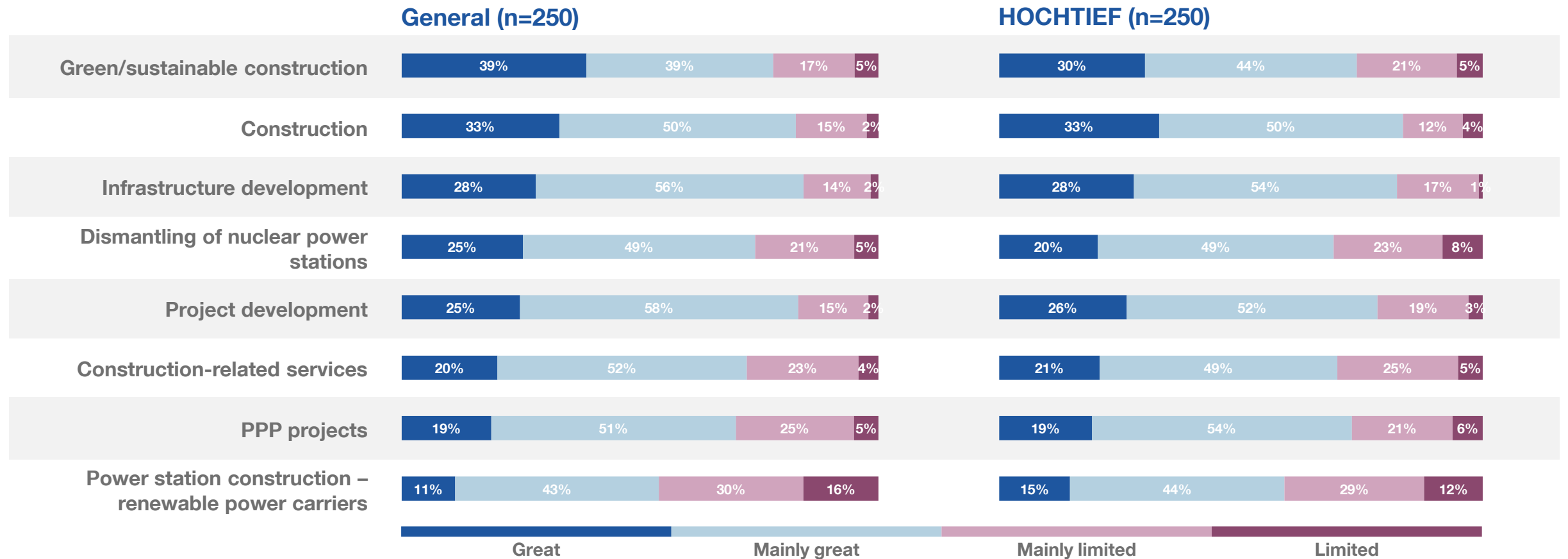
Question: "In your opinion, what are HOCHTIEF's three most important areas of operation?"



Basis: Net random sample, multiple answers possible, accumulated share of Rank 1-3 shown

## Sustainable construction is perceived as a growth area.

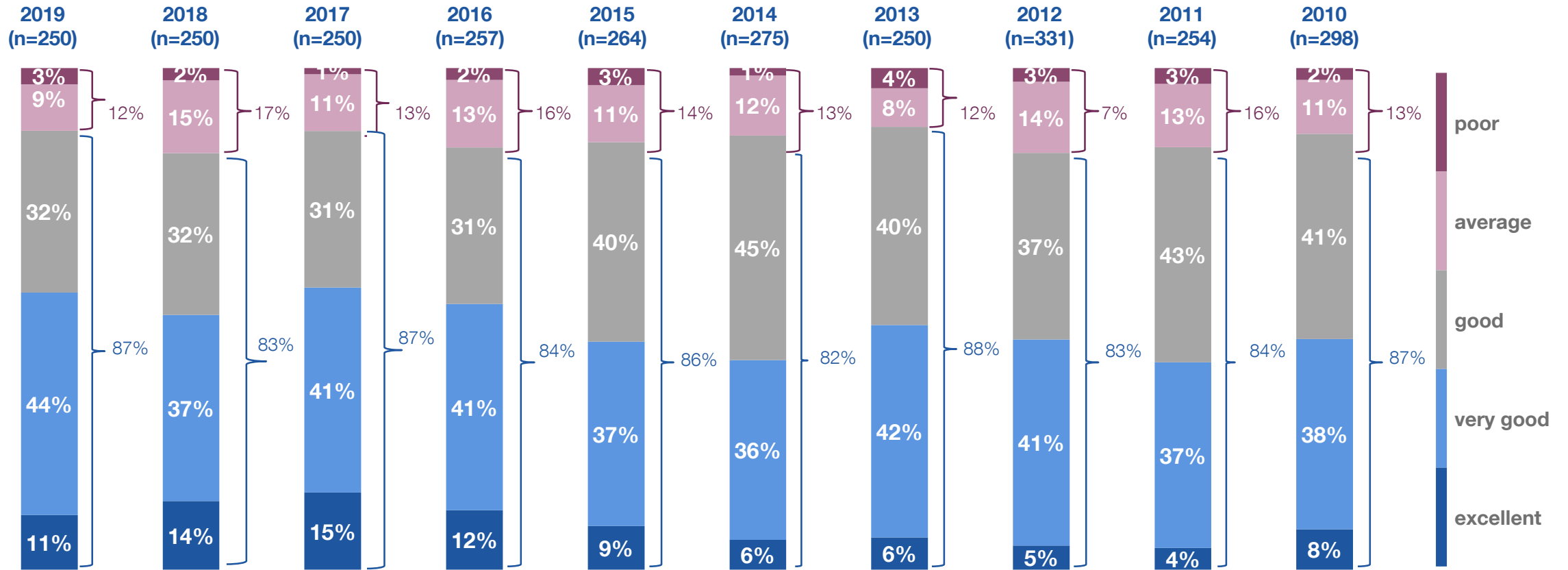
How do you rate growth opportunities of construction groups in the following areas?



Basis: Net random sample, sorted by general criteria (Top 2 Boxes)

# Reputation of HOCHTIEF evaluated by majority as “good”, “very good” or “excellent”. Negative perception of reputation at a low level.

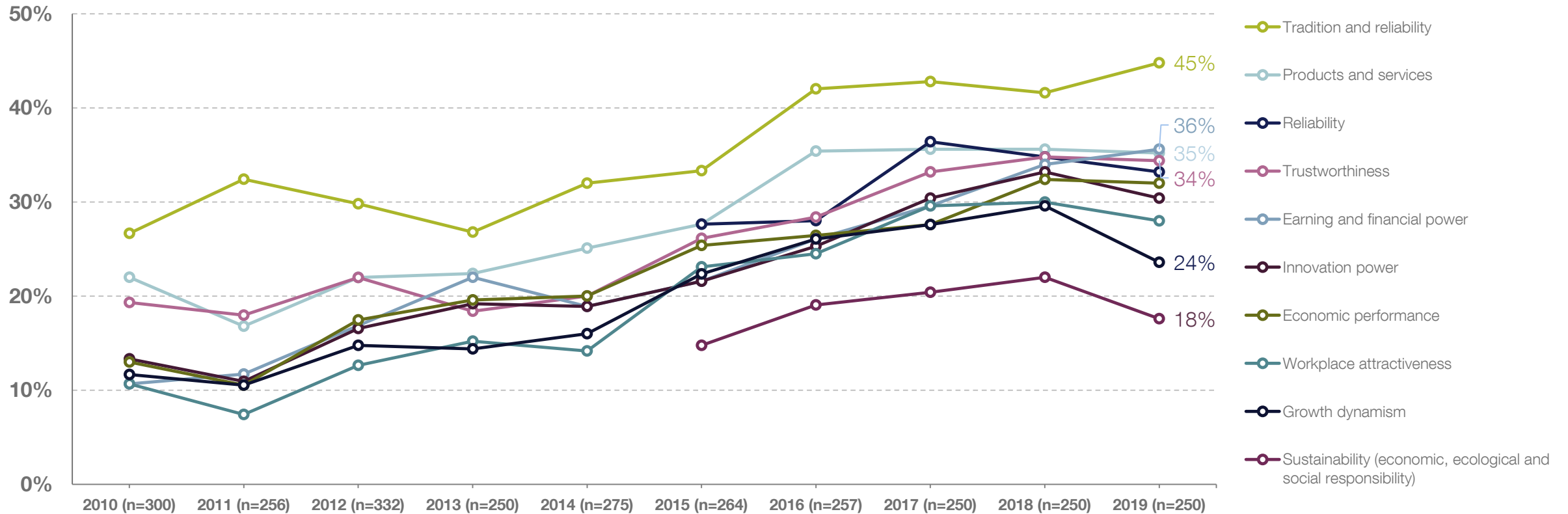
Question: “How do you see HOCHTIEF’s reputation altogether?”



Basis: Net random sample

# Great perception of reputation regarding tradition, earning power, products and trustworthiness.

Question: "HOCHTIEF has a good reputation with regard to..."

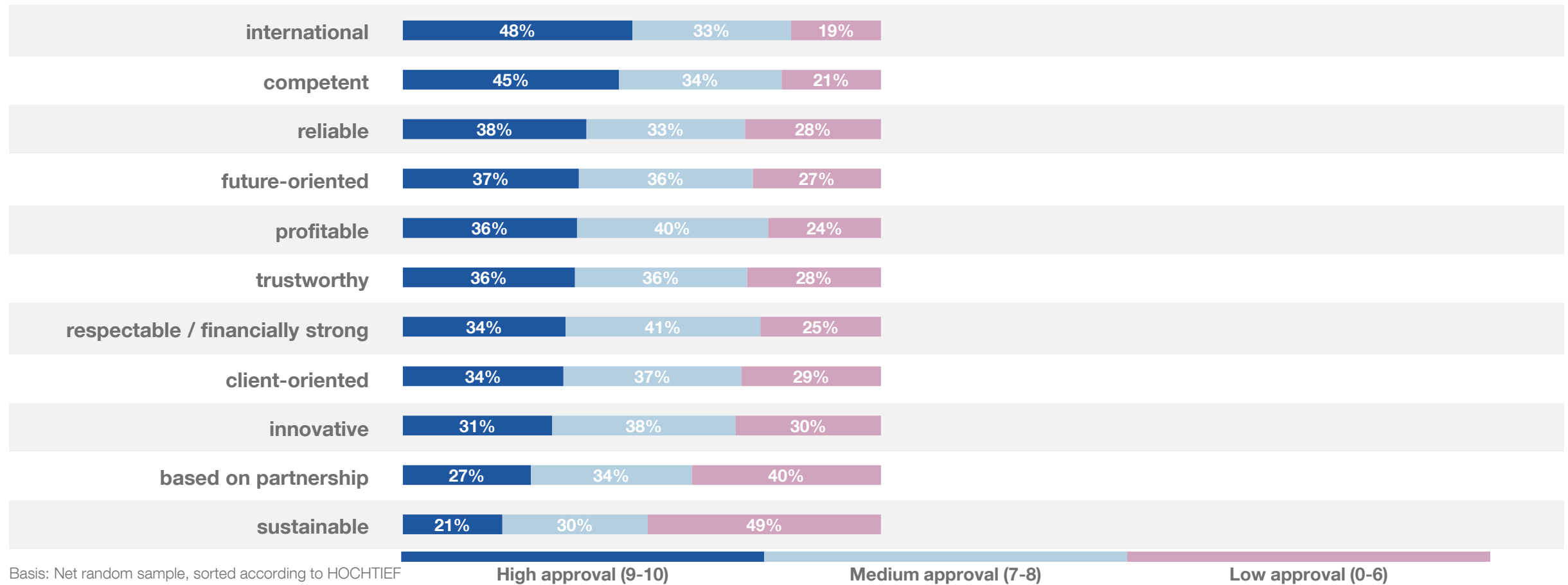


Basis: Net random sample, multiple answers possible, sorted according to 2019 (Top 2 Boxes), \*until 2013 "Social Responsibility" (in 2014 not asked)

## Every second respondent perceives HOCHTIEF as an international company, high evaluations also for competence/expertise.

HOCHTIEF is...

HOCHTIEF (n=250)

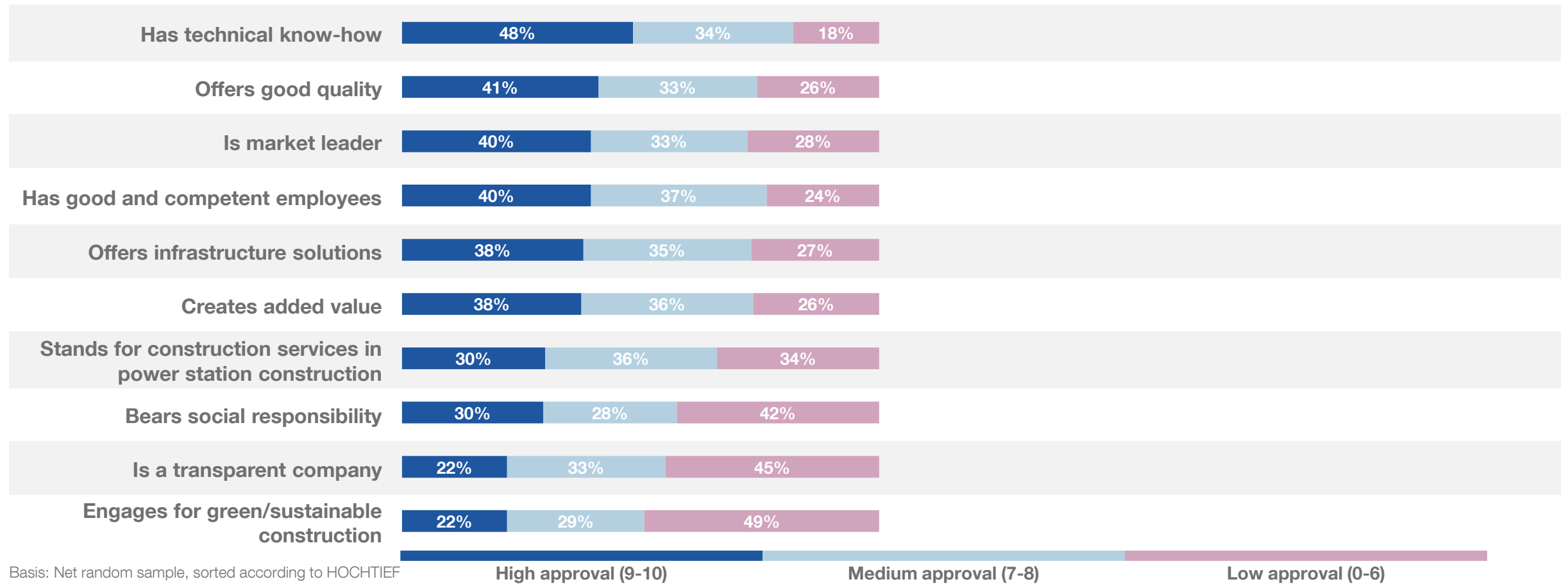


Basis: Net random sample, sorted according to HOCHTIEF

## HOCHTIEF is associated with competence, quality and market leadership. There is room for improvement regarding transparency and sustainability.

Question: “How do you rate HOCHTIEF using the following competencies/values?”

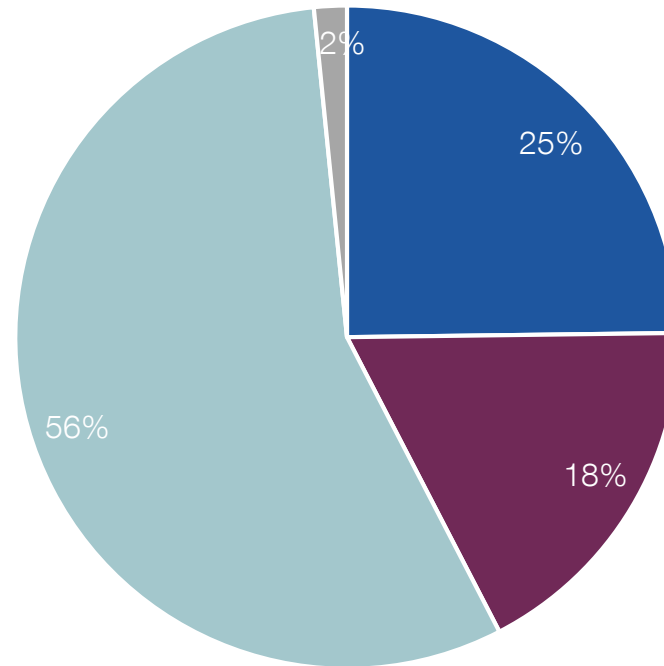
HOCHTIEF (n=250)



Basis: Net random sample, sorted according to HOCHTIEF

## Social commitment: For more than half of respondents both are important—local, direct commitment and global initiatives independent of the location of operations.

In your opinion, at what levels should international companies commit themselves most of all to society?

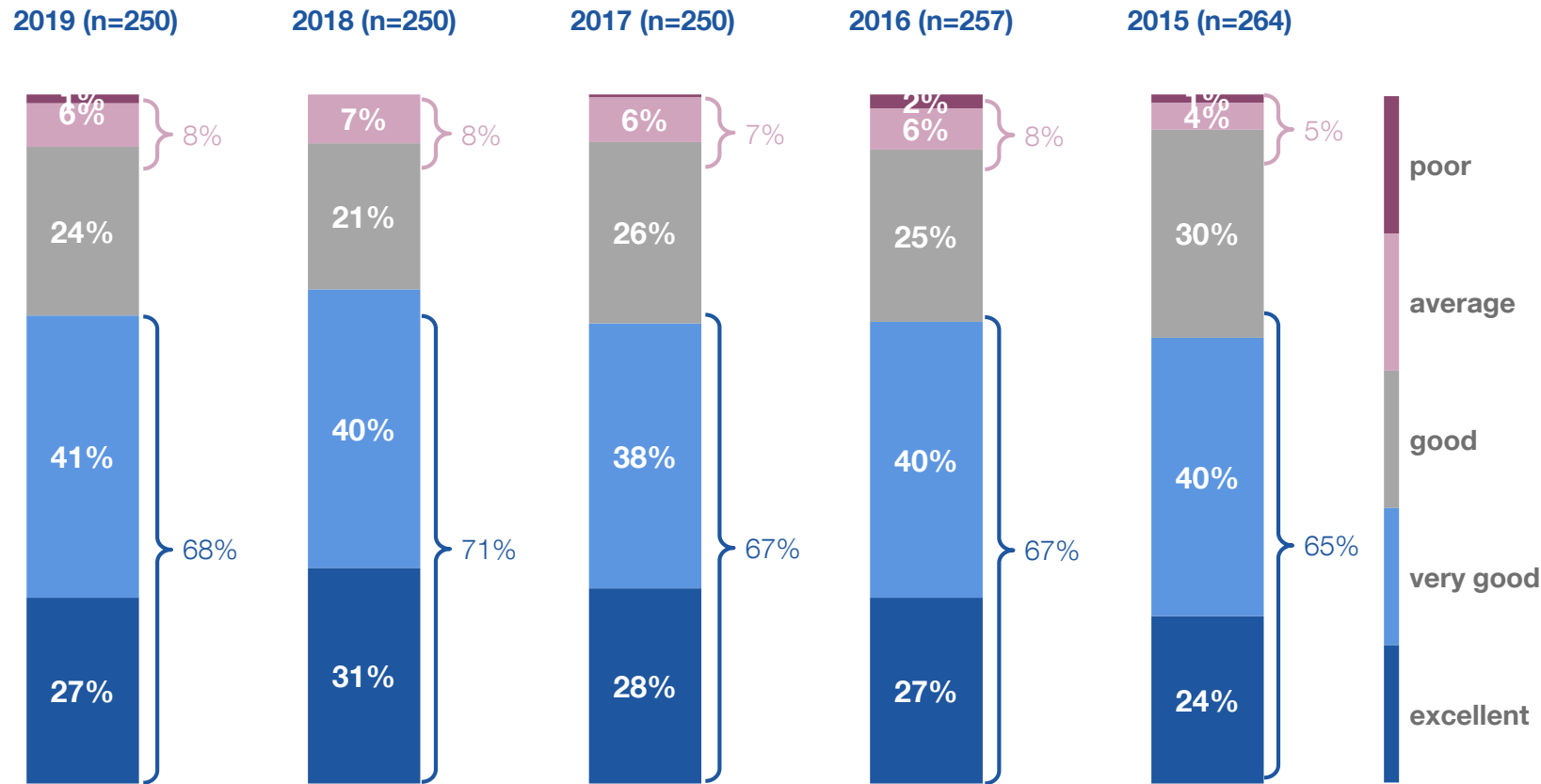


- locally and directly in cities, municipalities and countries where they operate
- globally and independent of where their business operations are
- both levels are equally important
- don't know



# “Bridges to Prosperity” continues to be perceived as very positive. Two thirds of respondents rate the project as “very good” or “excellent”.

Question: “How do you personally rate this project overall?”



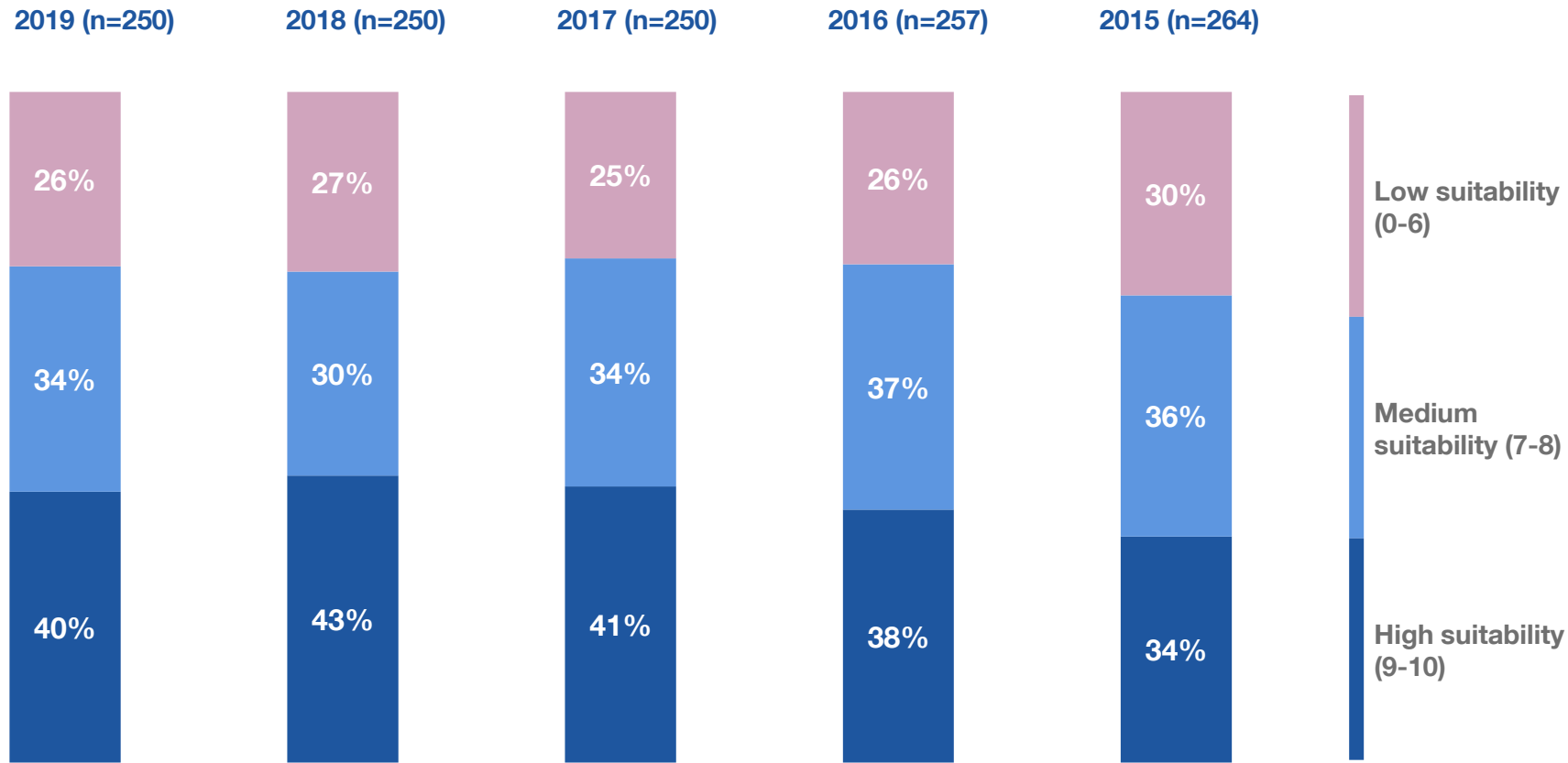
In its societal commitment, HOCHTIEF concentrates on cooperation with the non-governmental organization Bridges to Prosperity:

In remote regions of the world, HOCHTIEF employees and local inhabitants build pedestrian bridges, so that inhabitants receive better access to medical facilities, education and trade.

Basis: Net random sample

## The project “Bridges to Prosperity” is very well suited to the company: Four out of ten respondents evaluate this as highly suited to HOCHTIEF.

In your opinion, how well is this project suited to HOCHTIEF?

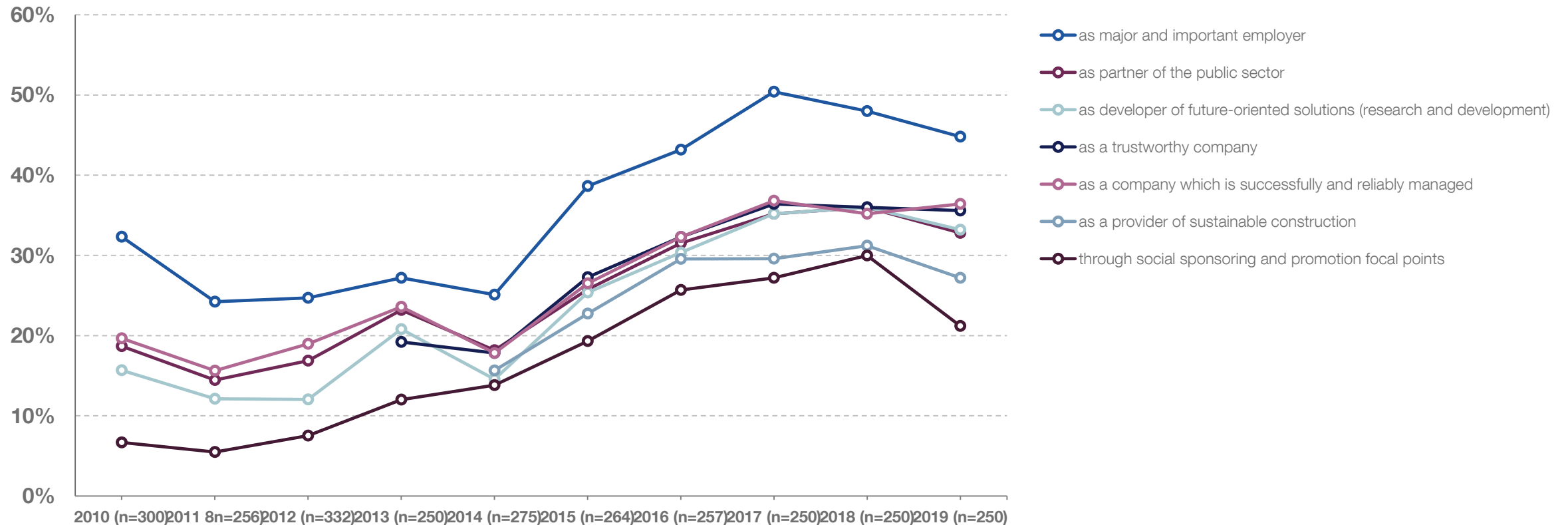


*In its societal commitment, HOCHTIEF concentrates on cooperation with the non-governmental organization Bridges to Prosperity:*

*In remote regions of the world, HOCHTIEF employees and local inhabitants build pedestrian bridges, so that inhabitants receive better access to medical facilities, education and trade.*

# Attribution of HOCHTIEF's added value to society above all as employer, through economic power and trust.

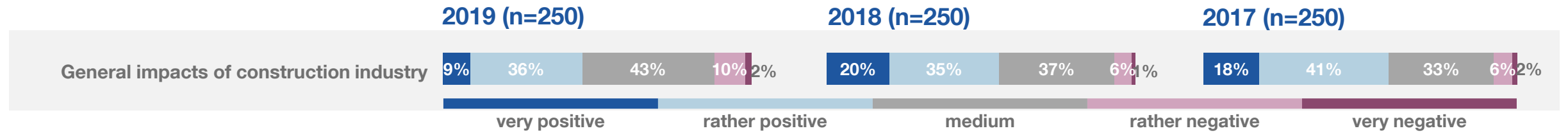
Question: "HOCHTIEF has a positive influence on society..."



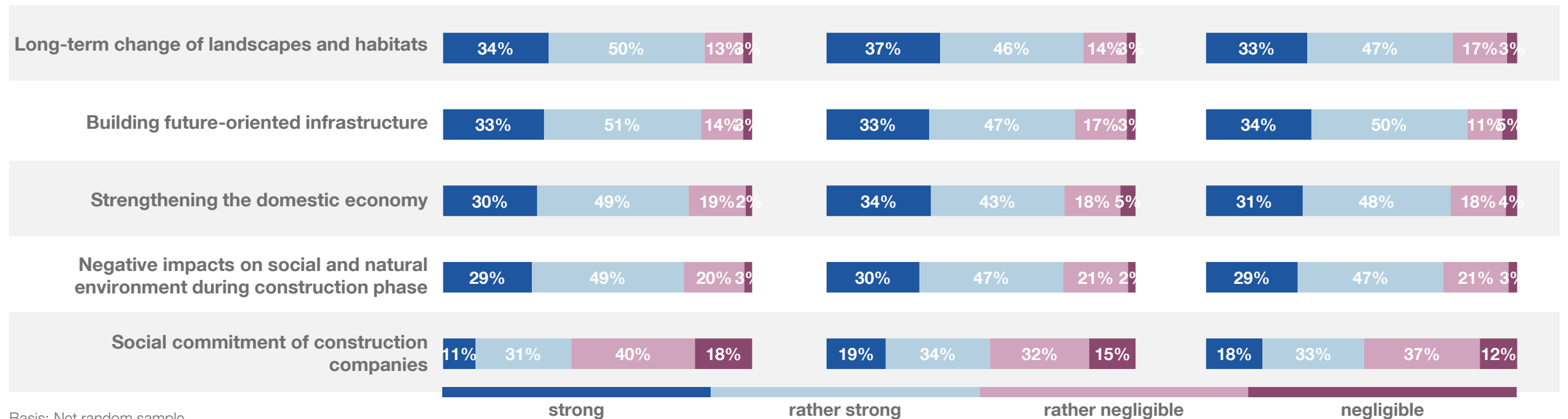
Basis: Net random sample, sorted according to 2019 (Top 2 Boxes)

# Impacts of construction companies on the environment and society are above all seen in agriculture and infrastructure.

Question: “How do you assess the impacts of operating activities of construction companies on society and the climate and environment in general?”



How strong, do you think, are the impacts of operating activities of construction companies on society and the environment especially in the following areas?



Basis: Net random sample