



Global EHS Leaders Survey 2018: EHS Consulting Brands

NOVEMBER 2018

WWW.VERDANTIX.COM

Global EHS Leaders Survey 2018: EHS Consulting Brands

This report helps strategy leaders, chief marketing officers and business development directors at EHS consulting firms understand the strength of their brand awareness and brand preference in the eyes of 411 customers across 35 countries. The brand assessment study was conducted between August and September 2018 via telephone interviews of senior EHS decision-makers with direct responsibility for corporate-wide EHS management strategies and initiatives. Of the 411 respondents, all belong to firms with revenues of at least \$250 million and up to over \$20 billion, covering 25 industries. In aggregate, 51% of the interviewed EHS decision-makers represented industries with high to very high EHS risk profiles. We also focused on industries with very high EHS risk profiles: chemicals, mining and metals, and oil and gas, accounting for 28% of the respondents.

TABLE OF CONTENTS

Global EHS Leaders Survey 2018: EHS Consulting Brands	3
Global Multi-Industry Survey With EHS Decision-Makers Delivers Granular Insight	
DuPont Sustainable Solutions Led In Brand Preference Among EHS Consulting Providers	
DuPont Sustainable Solutions, Jacobs And AECOM Achieved The Top Brand Awareness Recognition	

TABLE OF FIGURES

Figure 1. EHS Consulting: Brand Preference Ranking	5
Figure 2. EHS Consulting: Brand Awareness Ranking	7

ORGANIZATIONS MENTIONED

AECOM, Amec Foster Wheeler / Wood Group, American Airlines, Antea Group, ARCADIS, Borealis, Clean Harbors, DEKRA Insight, DowDuPont, DuPont Sustainable Solutions, ERM, EY, Georgia Pacific, GHD Environment, Golder, Huco Consulting, Jacobs, Langan, Mitsubishi Motors, Ramboll, Tetra Tech, Trinity Consultants, WSP Parsons Brinckerhoff

Global EHS Leaders Survey 2018: EHS Consulting Brands

This report helps strategy leaders, chief marketing officers and business development directors at EHS consulting providers understand the strength of their brand awareness and brand preference in the eyes of 411 customers across 34 countries. The brand assessment study was conducted between August and September 2018 via telephone interviews of senior EHS decision-makers with direct responsibility for corporate-wide EHS management strategies and initiatives.

Global Multi-Industry Survey With EHS Decision-Makers Delivers Granular Insight

Data on brand awareness and brand preference across various industries and geographies provide essential insight to help executives shape marketing strategies and improve their pursuit of new business. For the 2018 version of the Verdantix annual telephone survey of EHS leaders, we expanded the process to cover:

- **411 firms with revenues of at least \$250 million.**

Of the 411 EHS decision-makers interviewed, 80% belonged to firms with revenues greater than \$1 billion. The survey covers firms in the mid-market segment with revenues of \$250 million to \$1 billion, the core enterprise segment with revenues of \$1 billion to \$10 billion, and the large enterprise segment with revenues above \$10 billion. Among the roles of the 411 respondents, 15% were in SVP, VP or Head roles, 26% were in senior director or director roles, and the remaining 59% were in senior manager or manager roles.

- **25 industries weighted to sectors with higher EHS risks.**

The 2018 survey covered 25 industries segmented into four categories based on perceived EHS risk: very high, high, medium and low (see Verdantix Global EHS Leaders Survey 2018: Budgets, Priorities and Tech Preferences). In aggregate, 51% of the interviewed EHS decision-makers represented industries with high to very high EHS risk profiles. A large focus was placed on industries with the highest EHS risk profile—chemicals, mining and metals, and oil and gas accounted for 28% of respondents. This year's survey placed the greatest focus on industries with medium EHS risk profiles, such as electronic and electrical manufacturing, and food and beverage production, totaling 38% of respondents.

- **35 countries, focused on regions with higher levels of EHS spend.**

The 411 respondents that participated in the 2018 survey are spread throughout 35 countries and grouped into five geographical regions: Asia Pacific, Europe, Gulf States and Africa, Latin America, and North America. The 2018 survey saw an increase from 382 respondents across 31 countries that participated in the previous year's survey. Since North America is the region with the highest spend on EHS technologies globally, the United States and Canada constituted the largest fraction (32%) of surveyed decision-makers. Europe aggregately accounted for 27% of respondents, as the region with the second highest spend on EHS technologies. The Asia Pacific region—which includes China, Taiwan, Vietnam, Thailand, Indonesia, Malaysia, Singapore, India, Australia and New Zealand—accounted for 20% of survey respondents.

DuPont Sustainable Solutions Led In Brand Preference Among EHS Consulting Providers

In 2018, Verdantix expanded the annual survey to include 411 firms across 25 industries and 35 countries. The largest portion of respondents belonged to industries with higher EHS risks. Brand preference is defined as

respondents perceiving an EHS consulting firm as having market-leading or strong capabilities (see Figure 1). Based on the survey responses, it is clear that:

- **DuPont Sustainable Solutions far exceeded all other consulting vendors in brand preference.**
When examining brand preference (the percentage of respondents citing market-leading or strong capabilities), DuPont Sustainable Solutions (DSS) achieved 52% recognition compared to the second-highest ranked EHS consultant at 31%. At the global level, 14% of respondents considered DSS to have market-leading capabilities with another 38% believing DSS had strong capabilities as an EHS consulting firm. DSS—the consulting arm of DowDuPont—has leveraged its large global footprint, resources and expertise dealing with safety in high-risk EHS industries to provide services to firms such as American Airlines, Borealis, Georgia Pacific and Mitsubishi Motors (see Verdantix DSS Brings An Integrated And Behaviour-Focused Approach To ORM).
- **Jacobs, EY, ERM and AECOM rounded out the top five in brand preference.**
Four vendors scored between 32% and 26% for brand preference to round out the top five among the 18 EHS consulting firms surveyed. Jacobs had an aggregate brand preference of 31%, in addition to 6% citing the firm as having market-leading capabilities and 25% acknowledging strong capabilities as an EHS consultant. Similarly, 11% cited EY as having market-leading capabilities while 17% cited strong capabilities, bringing the firm’s aggregate brand preference percentage to 28%. These firms were closely followed by ERM, with a total brand preference of 27%, and AECOM, with a total brand preference of 26%. When examined for Asia Pacific and Gulf States and Africa regional segmentations, EY had the highest brand preference of 53% and 46%, respectively. Among North American respondents, Jacobs received brand preference recognition from 43% of respondents.
- **Golder and GHD Environment exceeded the average brand preference score of 16%.**
Beyond the top five EHS consulting providers, two other vendors scored above the average brand preference percentage of 16%. Golder’s aggregate brand preference was 19% whilst GHD Environment received brand preference recognition from 18% of global respondents. When examined at the regional level, GHD Environment’s brand preference recognition increased significantly to 43% among Gulf State and Africa respondents as well as 28% for Asia Pacific respondents. Golder’s brand preference recognition increased to 21% among European EHS decision-makers.
- **Remaining 11 EHS consulting firms scored at or below average for brand preference.**
The remaining 11 EHS consulting providers scored at or below the average brand preference of 16% were DEKRA Insight, ARCADIS, Huco Consulting, Amec Foster Wheeler / Wood Group, Clean Harbors, Trinity Consultants, Ramboll, Antea Group, WSP Parsons Brinckerhoff, Tetra Tech and Langan. Many of these firms are large consultancies with either a specialized EHS focus or regional presence. New York-based Trinity Consultants, with 6% brand preference at the global level, displayed a regional strength of 13% brand preference among North American respondents. Similarly, Huco Consulting registered a 22% brand preference in the Gulf States and Africa and a 19% brand preference in the Asia Pacific compared to its lower global brand preference of 12% among EHS decision-makers.

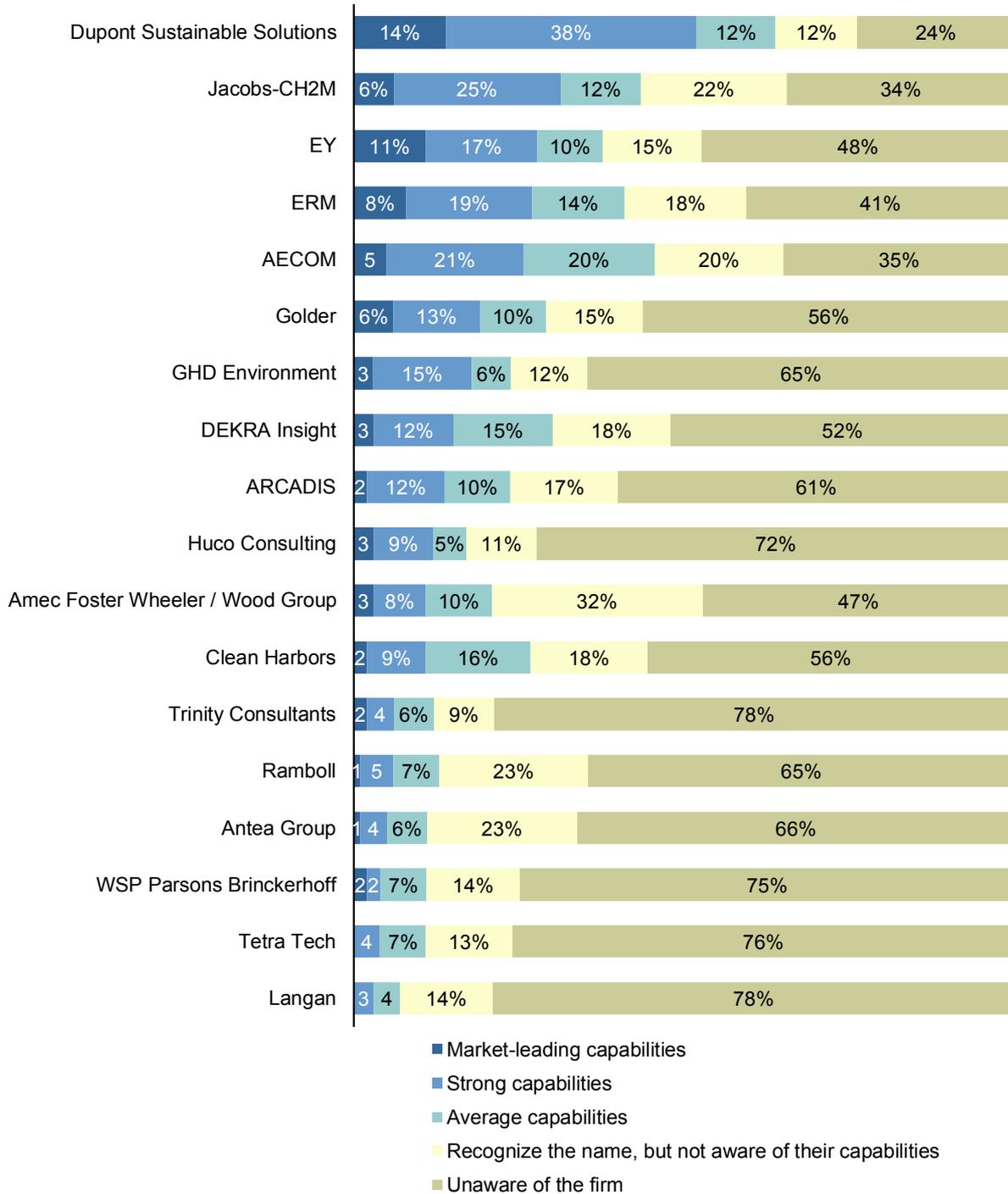
DuPont Sustainable Solutions, Jacobs And AECOM Achieved The Top Brand Awareness Recognition

When examining the survey data from a brand preference perspective, DuPont Sustainable Solutions was far ahead, with 52% of respondents citing market-leading or strong capabilities. DSS was followed by Jacobs, EY, ERM and AECOM rounding out the top five. The firms Golder and GHD Environment both exceeded the average

FIGURE 1

EHS Consulting: Brand Preference Ranking

“What is your perspective on the capabilities of the following EHS consulting providers?”



Note: Data labels are rounded to zero decimal places, percentages less than 5% have been written as numbers
 Source: Verdantix

n=411

score of 16%. To provide insight into brand awareness as opposed to brand preference, we aggregated all responses that indicated awareness of brands to provide a binary “awareness vs. lack of awareness assessment” (see Figure 2). Based on this analysis, we discovered that:

- **DuPont Sustainable Solutions stood out as the most recognizable brand.**

DSS was the most recognized brand among all survey respondents with 76% global brand-name recognition. DSS focuses on helping clients improve safety and operational performance and serves industries with very high EHS risk profile, including chemicals, mining and oil and gas. DSS has grown its leading brand awareness by delivering long-standing EHS services, establishing a strong geographic presence, leveraging its large organizational scale, and marketing its capabilities.

- **Jacobs, AECOM, ERM, Amec Foster Wheeler / Wood Group and EY all had brand awareness above 50%.**

Jacobs (66%), AECOM (65%), ERM (59%), Amec Foster Wheeler / Wood Group (53%) and EY (52%) were the other six consultancy firms with brand awareness exceeding 50%. Jacobs, AECOM, Amec Foster Wheeler / Wood Group and EY are large multi-disciplinary service providers that have succeeded in establishing their brands among EHS professionals. The gap behind DuPont Sustainable Solutions is likely the result of these other consultants having a core business outside of EHS services and lacking a presence in some regional markets.

- **Despite their global scale, seven vendors had brand awareness mired between 50% and 33%.**

The seven vendors whose brand awareness fell between 50% and 33% were DEKRA Insight (48%), Golder (44%), Clean Harbors (44%), ARCADIS (39%), GHD Environment (35%), Ramboll (35%) and Antea Group (34%). Golder, ARCADIS and Ramboll are large global engineering firms, although they fell below 50% for brand awareness among EHS decision-makers. Clean Harbors, GHD Environment and Antea Group are environmental consulting specialists, whilst DEKRA Insight is a large global testing, inspection and certification provider.

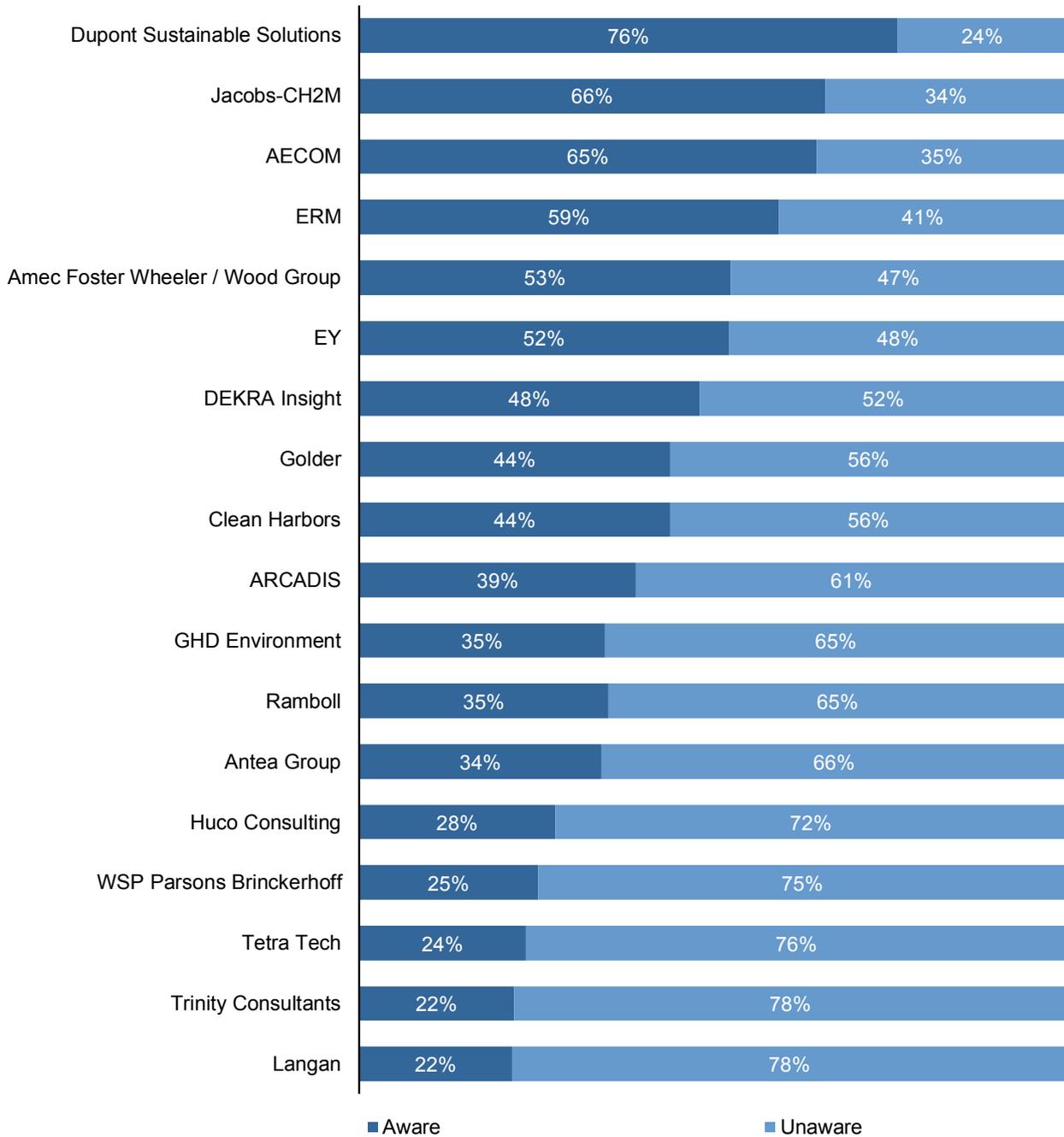
- **Remaining five vendors had brand awareness below 33% among global respondents.**

The five remaining vendors who scored below 33% awareness of global respondents were Huco Consulting, WSP Parsons Brinckerhoff, Tetra Tech, Trinity Consultants and Langan. Vendors such as Huco Consulting and Trinity Consultants are smaller in size, each with fewer than 1,000 employees, which likely explains their lower brand awareness levels. Other vendors such as WSP Parsons Brinckerhoff and Tetra Tech have over 10,000 employees but still struggle to attain mainstream awareness possibly due to offering specialized expertise limited to specific aspects of EHS performance improvement.

FIGURE 2

EHS Consulting: Brand Awareness Ranking

“What is your perspective on the capabilities of the following EHS consulting providers?”



Note: “Aware” is the aggregate number based on the following four responses: “Market-leading capabilities”; “Strong capabilities”; “Average capabilities”; and “Recognise the name, but not aware of their capabilities”.

Data labels are rounded to zero decimal places, percentages less than or equal to 5% have been written as numbers.

Source: Verdantix

n=411

VERDANTIX CAPABILITIES: RESEARCH, ADVISORY & EVENTS

Through our research activities and independent brand positioning we provide clients with:

- ✓ **Research relationships based on an annual research subscription**
- ✓ **Confidential advisory services such as commercial due diligence**
- ✓ **Thought leadership studies for brand building and lead generation**
 - ✓ **Executive summits, roundtables and webinars**
- ✓ **Advisory workshops to rapidly increase your sector knowledge**
 - ✓ **Multi-country and complex customer survey projects**
 - ✓ **Marketing campaign support with analysts and content**

VERDANTIX MARKET COVERAGE

EHS Information Management

Focuses on the software and services markets that enable corporations to improve their performance across environment, health and safety including compliance, risk and performance.

Product & Supply Chain Stewardship

Focuses on software, content and services which support corporate strategies and systems that target product compliance and risk management up the supply chain.

Real Estate & Facilities Information Management

Focuses on software, intelligent building technologies and consulting services that enable real estate and facilities executives to optimize the value and performance of their building portfolios.

Energy & Maintenance Software

Focuses on software and related hardware for energy usage optimization and equipment maintenance management across all types of energy consuming assets.

WHY VERDANTIX?

Verdantix is an independent research and consulting firm with a focus on innovative technologies that optimize business operations. We have expertise in environment, health, safety and quality as well as energy, real estate, facilities and maintenance.