

Global Corporate Survey 2021: EHS Service Providers Brand Recognition

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Global Corporate Survey 2021: EHS Service Providers Brand Recognition

This report helps strategy executives, chief marketing officers and business development directors at EHS service providers understand the strength of their brand preference and brand awareness from the perspective of 302 corporate customers situated across 31 countries and 25 industries. The brand assessment study was conducted as part of our global EHS services survey, which ran in June and July 2021, taking the form of telephone interviews with EHS executives with responsibility for corporate-wide EHS management activities. Of the 302 senior EHS executive survey respondents, 29% were EHS managers; 36% were Directors of EHS; and 35% held the title of Head of EHS. DuPont Sustainable Solutions and AECOM emerged with the highest brand awareness of the 24 services provides, benefiting from a strong brand perception across the globe.

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ORGANIZATIONS MENTIONED

Accenture, AECOM, Arcadis, Capgemini, Clean Harbors, DEKRA Insight, Deloitte, DuPont Sustainable Solutions, ERM, EY, Frostbyte Consulting, GHD, Golder, Guardhat, Gyrus Capital, Hoare Lea, Huco Consulting, Industrial Scientific Jacobs, KKS Advisors, Langan, Linx-AS, Lloyd's Register, Oak Hill Capital Partners, Ramboll, Stantec, Tetra Tech, Trinity Consultants, Wood, WSP, WYG.

Global Survey Gives Insight Into Corporate Perception Of EHS Services Brands

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Survey Of EHS Decision-Makers Shows EHS Service Provider Preferences

The Verdantix global corporate survey of EHS service firms set out to gain insight into the budgets, priorities and preferences of corporate EHS executives. As an aspect of this, we quizzed respondents on their brand preference and awareness of 24 prominent EHS consultancies. Our survey covered:

- **302 respondents, representing firms with revenues of at least \$250 million.**
Verdantix interviewed 302 senior EHS executives, representing corporate firms broken down into four demographics: mid-market firms, with revenues between \$250 million and \$1 billion (accounting for 27% of respondents); the core enterprise segment, with revenues between \$1 billion and \$10 billion (48% of respondents); large enterprises, with revenues between \$10 billion and \$20 billion (11% of respondents); and firms with revenues greater than \$20 billion (15% of respondents). Amongst the job titles of interviewees, 29% were EHS managers; 36% were Directors of EHS; and 35% held the title of Head of EHS.
- **25 industries, weighted to higher EHS risk sectors.**
The firms included in the corporate survey were grouped into four categories based on their perceived EHS risk: very high-risk industries, specifically, the chemicals, metals and mining, and oil and gas sectors; firms with high-risk profiles, namely aerospace, airlines, construction, forestry, pulp and paper, maritime, ports and airports, and power utilities; and medium EHS risk sectors, including electronic and electrical manufacturing, and food and beverage production.
- **31 countries, focused on locations with higher EHS spend.**
The 302 survey respondents represented firms headquartered in 31 countries and five geographical regions – Asia-Pacific, Europe, the Gulf states and Africa, Latin America, and North America. The number of firms interviewed from each region was weighted on the average EHS spend in the region. With the highest global EHS spend, North America made up 28% of surveyed EHS decision-makers. Europe accounted for 29% of respondents, as the region with the second-highest spend on EHS technologies. The Asia-Pacific region – the largest emerging EHS market – accounted for 17% of survey respondents.

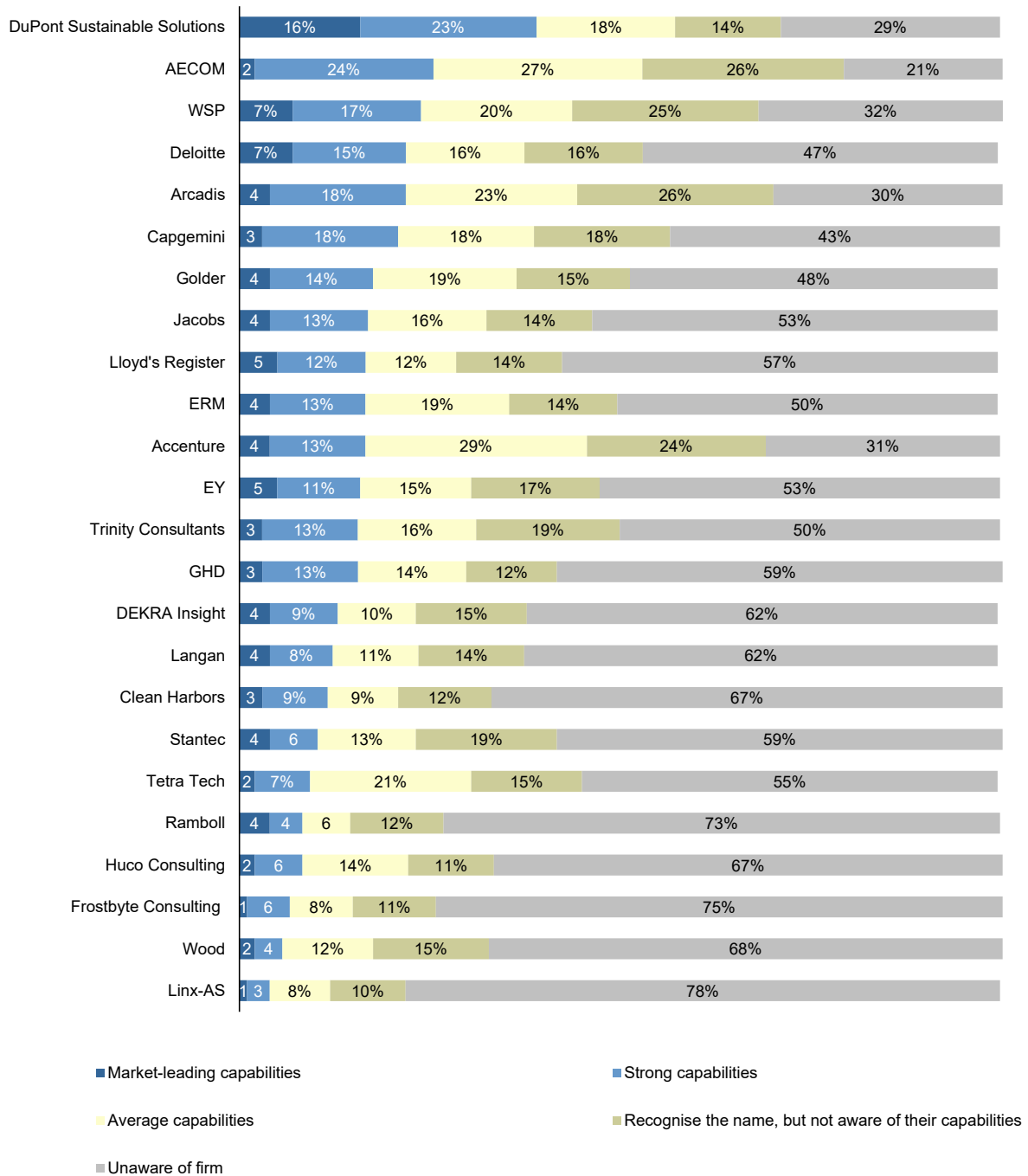
Specialized Consultancies Start To Bridge The Awareness Gap With Leading Service Firms

In June and July 2021, Verdantix interviewed 302 EHS decision-makers representing firms across 25 industries and in 31 countries. As part of the survey, we asked respondents for their perceptions of the services offered by prominent EHS consultancies. We define brand preference as a respondent viewing an EHS service firm as having either market-leading or strong capabilities (see **Figure 1**). In order to additionally accumulate insight into brand awareness, Verdantix grouped all responses indicating awareness, to create a binary evaluation of ‘awareness vs lack of awareness’ (see **Figure 2**). Accruing these data, Verdantix found that:

FIGURE 1

Global Brand Perception Of EHS Service Providers

"What is your perspective on the capabilities of the following EHS service providers?"



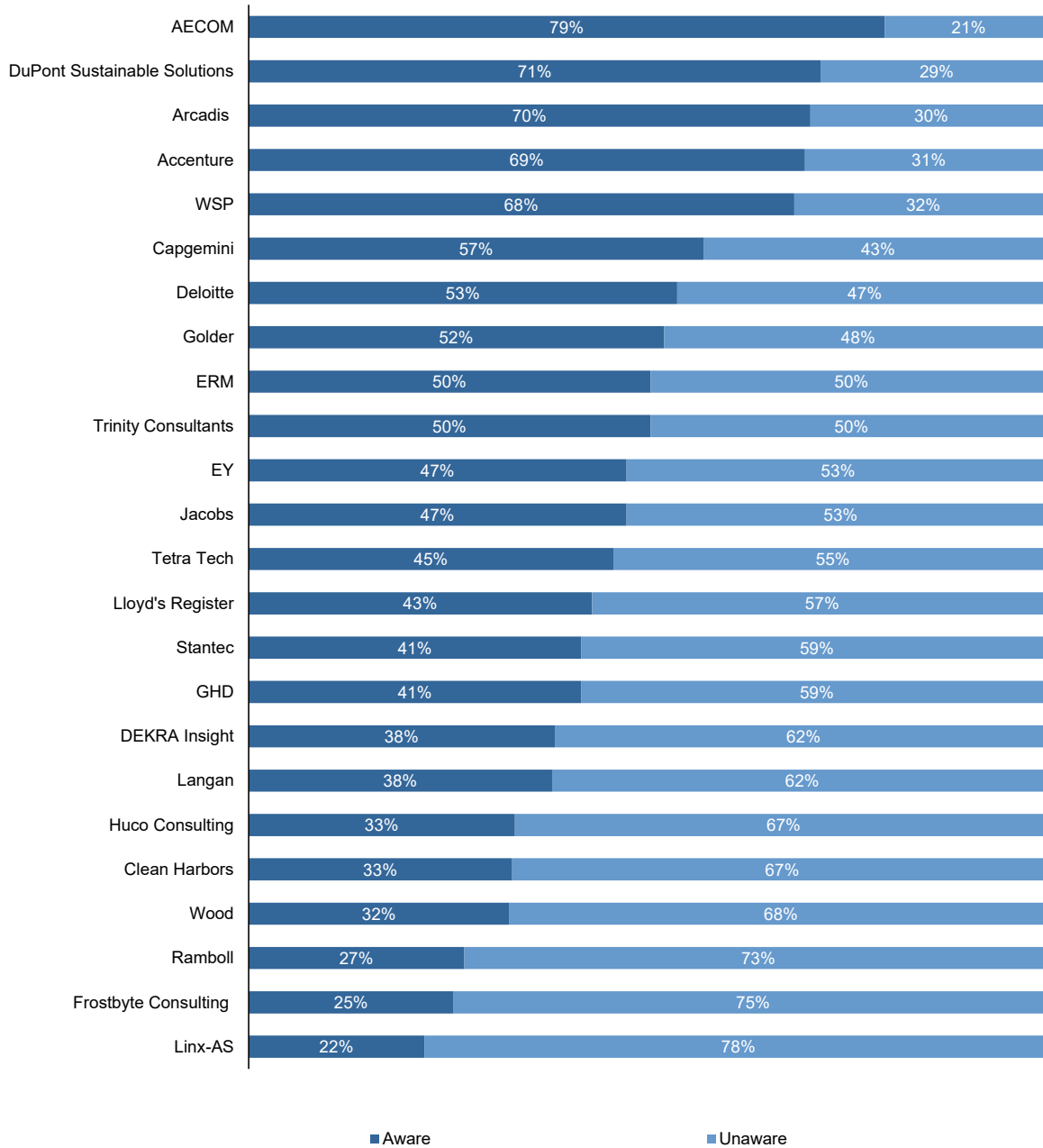
Note: Data labels are rounded to zero decimal places, percentages less than 7% have been written as numbers

Source: Verdantix, Analysis

FIGURE 2

Global Brand Awareness Of EHS Services Providers

"What is your perspective on the capabilities of the following EHS service providers?"



Note: Data labels are rounded to zero decimal places, percentages less than 7% have been written as numbers
 Source: Verdantix, Analysis

- DSS and AECOM's extensive footprints resulted in highest global brand preference and recognition.** Scoring highest out of the EHS service firms regarding brand preference (39%) and second in brand awareness (71%), DuPont Sustainable Solutions (DSS) has used the platform provided by its parent firm DuPont, and financial support by Gyrus Capital, to catapult its position after becoming a standalone consulting practice in 2019. DSS has continued to diversify its services to perform a wider array of project types catering to a greater scope of industries. A prime example of this growth was its June 2021 acquisition of KKS Advisors, a specialist environment, social and governance (ESG) and sustainability consulting firm. AECOM scored highest in global brand awareness (79%) and second in global brand preference (26%). AECOM offers an extensive range of engineering, design and management services, in addition to EHS. Not only does the firm have a strong presence in North America, scoring a massive 85% in brand awareness in that region, but also boasts an extensive global footprint, with offices in Australia, Hong Kong, India, London, Singapore and the UAE.
- Global consulting firms benefit from a widespread reputation across adjacent services offerings.** Service providers with extensive consulting arms that encompass a much wider scope of services exhibited greater brand awareness than many EHS specialist vendors. Amongst the top 10 vendors, AECOM and Arcadis focus on sustainable engineering and infrastructure, whilst Accenture, Capgemini and Deloitte offer a wide portfolio of professional services. Without doubt, the reputation of these service providers outside of EHS contributes to their large global awareness – but it also reflects corporate demand for expertise in adjacent areas to complement EHS projects. The Verdantix 2021 services survey revealed that 88% of EHS decision-makers view the Head of Operations as an important decision-maker in EHS services investment (see [Verdantix Global Corporate Survey: EHS Services Budgets, Preferences And Priorities](#)). Consultants with a broader range of capabilities are better-suited to providing solutions that unite stakeholders from various business units; take Capgemini's XIoT platform, for instance, which digitizes both operations and safety with connected devices.
- A number of service providers have traversed the awareness gap through acquisitions.** Our previous year's brand survey saw a notable divide in brand recognition between large global consultancies and more specialized vendors (see [Verdantix Global Corporate Survey 2020: EHS Service Providers Brands Recognition](#)). This iteration of the survey has seen Trinity Consultants scoring 50%, Tetra Tech scoring 45% and Stantec scoring 41% in corporate brand awareness, with all of these exhibiting a significant increase over the previous year's scores. These firms have all invested aggressively both to grow market share and to diversify expertise. Trinity Consultants exhibited a 23% rise in brand awareness compared with 2020. The service firm has bolstered its environmental capabilities, acquiring AWN Consulting in January 2021. Bought by private equity firm Oak Hill Capital Partners in July 2021, Trinity will leverage this influx of financial support to continue accelerating its growth strategy. Similarly, Stantec has acquired with intent, buying five firms in the last 12 months that diversify its expertise, as well as solidifying its presence in Asia-Pacific, Europe, and the US. Tetra Tech can likewise attribute its growth in awareness to a string of acquisitions aimed at building the firm's footprint outside of the US, such as those of UK-based engineering consultancies Hoare Lea and WYG.

Traditional EHS Service Providers Should Diversify Capabilities To Build Greater Brand Awareness

Although brand awareness is more evenly distributed amongst EHS service firms than in the previous year, global EHS consulting firms still hold a distinct brand awareness advantage over specialized vendors. To build a greater market presence, smaller EHS consultancies should focus their development strategies on providing service offerings that align with the priorities and preferences of corporate EHS decision-makers. Through our analysis of survey data, Verdantix recommends that EHS service firms should:

- Develop sustainability offerings to meet growing corporate ESG pressure.**

Results from the services survey saw 85% of respondents noting the use of EHS services for sustainability management as either valuable or very valuable. The increasing corporate appetite for ESG and sustainability projects marks a large growth opportunity for EHS consultancies (see [Verdantix Market Overview: Investor Focus On ESG Will Transform Sustainability Strategies](#)). Service firms must act quickly to diversify their offerings, with multiple vendors already making strategic moves to bolster their capabilities. Take ERM, which has made several acquisitions of sustainability-related consultancies in 2021 alone. The most telling move in the sector was WSP's acquisition of environmental consultants Golder in April 2021, representing a definite statement of the firm's viewpoint on the growing sustainability services market.
- Invest in the ability to digitally transform client EHS processes.**

Our 2021 EHS services survey data revealed that the ability to support clients' digitization efforts is the most telling differentiator when selecting an EHS service vendor, with 80% of respondents classing this as either important or very important. To bridge the brand awareness gap, service firms should look to accelerate their capacity to deliver technological solutions. Leading EHS service firms have poured resources into developing their digital consulting arms to address growing demand for EHS technology (see [Verdantix Green Quadrant: Digital EHS Services 2020](#)). DSS, for instance, offers a full digitization service, in which it integrates Internet of Things (IoT) devices from partners such as Guardhat and Industrial Scientific within its DSS Transform software solution, forming a connected safety platform.
- Strategize to cater for larger-scale projects.**

Survey data identified a preference amongst EHS decision-makers for large-scale consulting projects. Taking an average across all EHS functions, 80% of survey respondents favoured third-party engagements consisting of either multiple large interlinked projects or a single large-scale project (see [Verdantix Global Corporate Survey: EHS Services Budgets, Preferences And Priorities](#)). In addition to being the optimal third-party engagement structure for EHS decision-makers, high-profile projects with high impact give invaluable levels of brand exposure to service vendors. Service providers with high brand awareness, such as AECOM, DSS and WSP, have the infrastructure to drive corporate initiatives on an enterprise-wide level. Smaller consultancies should look to dedicate a higher percentage of resources to large-scale projects, either internally or through strategic partnerships.



VERDANTIX CAPABILITIES

RESEARCH, ADVISORY, INSIGHTS & 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

Environment, Health & Safety

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

Operational Excellence

Focuses on helping managers in operations, asset reliability, process safety and maintenance roles to leverage technologies which enhance production reliability, asset health and operational safety.

Smart Building Technologies

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.

ESG & Sustainability

Focuses on the decisions of investors, tech providers, financial services firms and corporate leaders. Conducting in-depth research on the full range of services and technologies required to succeed with ESG and sustainability strategies.

WHY VERDANTIX?

Verdantix is an independent research and advisory firm with expertise in digital strategies for **Environment, Health & Safety, ESG & Sustainability, Operational Excellence** and **Smart Buildings**. Our mission is to anticipate the insights and data that our clients need so you can succeed with growth strategies, invest wisely and optimize performance.

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