

Environment, Health & Safety

# Global Corporate Survey 2023: EHS Services Brands Recognition

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With Bill Pennington

November 2023



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This report aims to assist strategy executives, chief marketing officers, and business development directors at EHS service providers in gaining a comprehensive understanding of their brand preference and market awareness. For the 2023 edition of the Verdantix annual global EHS services survey, we conducted a comprehensive study across 31 countries and 17 industries. Through telephone interviews with 104 senior EHS executives during August and September, we obtained valuable insights into strategies and investments in EHS services at a corporate level.

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## Organizations mentioned

Accenture, AECOM, ALL4, Arcadis, BG Bonnard & Gardel Holding, Capgemini, Clean Harbors, DEKRA Insight, Deloitte, dss+, ERM, EY, Fortune, Frostbyte Consulting, GHD Environment, Huco Consulting, Jacobs, Langan, Linx-AS, Lloyd's Register, Onward Security, PwC, Ramboll, Reckitt, Stantec, Tetra Tech, Trinity Consultants, Wood, WSP.

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## Corporate perception of EHS service providers

In 2023, Verdantix conducted a global survey to identify the most prominent EHS service providers, based on the strength of their brand preference and awareness amongst EHS decision-makers (see [Verdantix Global Corporate Survey 2023: EHS Services Budgets, Priorities And Preferences](#)). Our survey evaluated the capabilities of 24 leading EHS service providers, with the objective of helping EHS professionals at service firms understand the strength and perception of their brand in the market. For the 2023 Verdantix annual global services survey, we targeted:

- **104 EHS decision-makers, representing firms with revenues of at least \$250 million.**  
Verdantix conducted interviews with senior executives responsible for EHS services and strategy, to gain accurate insights into firm-wide strategy and spend. The seniority level of respondents was evenly distributed across two tiers: SVP, VP, or head of function roles; and senior director or director roles. The interviewed firms had minimum annual revenues of \$250 million, with most achieving revenues of \$1 billion to \$10 billion.
- **17 industry groups, with a focus on high and very high risk verticals.**  
The 2023 Verdantix survey analysed 17 industry groups, segmenting these by perceived EHS risk. We categorized respondents into very high risk, high risk and medium risk industries. Most respondents came from resource-intensive industries, such as mining and metals, oil and gas, and power and water utilities.
- **31 countries, concentrating on regions with higher EHS services spend.**  
To gain a comprehensive understanding of global EHS needs and challenges, we surveyed respondents from 31 countries across five geographical regions: Asia-Pacific (APAC); Europe; the Gulf States and Africa; Latin America; and North America. The survey had a larger representation from the highest spending regions – North America and Europe.

## Global survey of EHS leaders provides insight into the EHS services market

The Verdantix global corporate EHS services survey provided insights into brand preference and awareness for 24 vendors in the market. We determine brand preference by grouping together respondents who indicate that a vendor has either 'market-leading' or 'strong' capabilities (see **Figure 1**). For brand awareness, we categorize responses indicating recognition of brands into two groups: 'aware of firm' and 'unaware of firm' (see **Figure 2**). Based on these analyses, we find that:

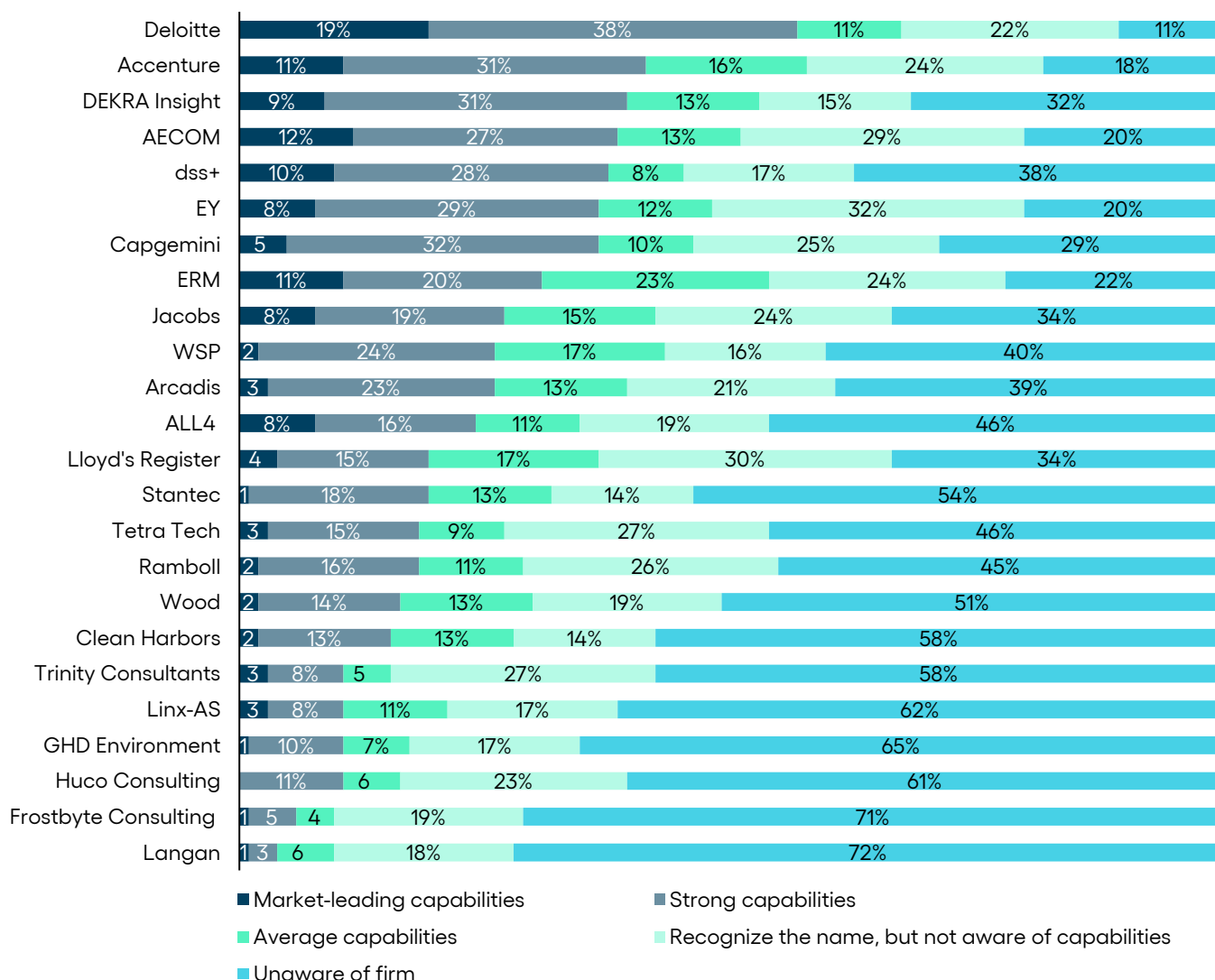
- **Deloitte holds the top position for brand preference in the EHS services market.**  
Deloitte has consistently held a prominent position for brand preference in the EHS services market within the Verdantix global survey, with EHS executives regularly highlighting its market-leading capabilities. With a preference rate of 57% in 2023, following a survey-high 67% in 2022 (see [Verdantix Global Corporate Survey 2022: EHS Services Brand Recognition](#)), Deloitte has solidified its reputation as a trusted and recognized consulting partner. Leveraging its extensive organizational resources and global presence, the firm stands out for its extensive offering of EHS services, especially in digital advancement. Deloitte serves clients ranging from Fortune 500 businesses to smaller firms in over 150 countries, customizing its services to meet regional needs. Its recent acquisition of portions of PwC's networks in the Maldives and Sri Lanka in October 2023 further demonstrates its ability to address complex business needs and consistently provide top-tier services globally.



Figure 1

EHS service firms: brand preference

What is your perspective on the EHS service capabilities of the following consulting firms ?



Note: Data labels are subject to rounding; percentages less than 7% are written as numbers.

Source: Verdantix Global Corporate EHS Survey 2023

N=104

• **Accenture, DEKRA Insight, AECOM, dss+, EY and Capgemini are highly preferred brands.**

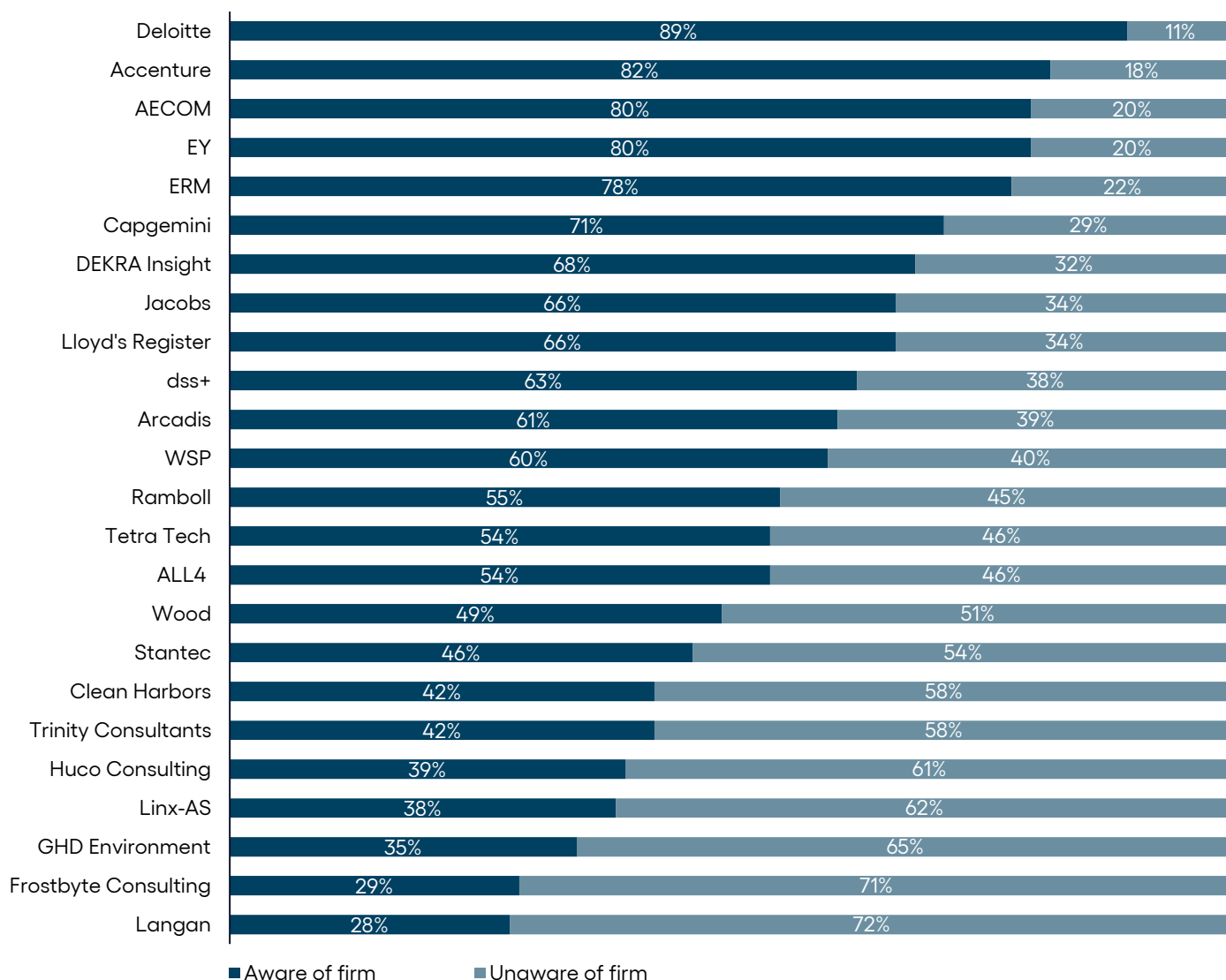
Accenture, DEKRA Insight, AECOM, dss+, EY and Capgemini enjoy high brand preference, of between 37% and 42%, specifically from resource-intensive industries, which represent many of the survey respondents. This is largely due to their niche expertise and innovative solutions, tailored specifically to these sectors. Accenture and DEKRA Insight have distinguished themselves in the oil and gas sector by providing transformative digital solutions. Accenture excels in delivering specialized asset management solutions, while DEKRA Insight offers a safety performance and compliance enhancement platform. DEKRA Insight significantly enhanced its impact in APAC, and strengthened its cyber security capabilities, through its acquisition of Onward Security in March 2023. AECOM, meanwhile, is recognized for its collaboration on wastewater projects, including an initiative that integrated a wastewater treatment plant and a reclaimed water plant in Taiwan. Niche expertise and industry-specific solutions are pivotal in driving brand preference in the EHS market: these firms demonstrate the need for tailored digital solutions to effectively address unique industry challenges and solidify their market presence.



Figure 2

EHS service firms: brand awareness

What is your perspective on the EHS service capabilities of the following consulting firms?



Note: Data labels are subject to rounding.

Source: Verdantix Global Corporate EHS Survey 2023

N=104

- ERM, Jacobs, WSP and Arcadis have above-average brand preference.

ERM, Jacobs, WSP and Arcadis achieve recognition rates of 26% or higher, positioning them in the top half of firms in terms of brand preference. Their extensive and strategic geographical presence significantly contributes to this recognition. ERM's widespread operations across the Americas, APAC, Europe and Africa equip it with the ability to tackle unique environmental and sustainability challenges worldwide. Similarly, Jacobs, with a robust presence in North America and a growing influence in the APAC region, demonstrates a capacity to deliver tailored solutions across different markets. WSP is present in over 40 countries, where it adeptly navigates region-specific EHS regulations. Arcadis, with a global footprint covering over 70 countries, likewise effectively caters to regional demands. Moreover, these firms demonstrate their adaptability and growth through strategic acquisitions. WSP's acquisition of BG Bonnard & Gardel Holding in January 2023 bolstered its European operations and strengthened its workforce in Switzerland and France.



- **Firms with a diversified offering improve their brand preference.**

Deloitte, Accenture, DEKRA Insight and AECOM emerge as preferred vendors, achieving recognition rates of 39% or higher. These frontrunners distinguish themselves by catering to a wide range of client needs through their diverse service offerings. Although all have extensive service portfolios, each has identified a unique niche, delivering highly targeted solutions. Deloitte, for example, stands out for driving business transformation and technology implementation. Accenture excels in facilitating digital transformation using cutting-edge technologies such as AI and cloud computing. DEKRA Insight's foundation is in workplace safety and operational risk management (ORM), while AECOM is adept at delivering sustainable and innovative solutions for complex infrastructure challenges, particularly in civil engineering, environmental consulting and urban planning.

## EHS consulting engagements are influenced by regulatory compliance, digital transformation and IT-driven EHS services

Our survey data rank Deloitte, Accenture, DEKRA Insight and AECOM as the top performers in terms of brand preference. For brand awareness, Deloitte, Accenture, AECOM and EY are the most widely recognized among our respondents. Alongside data analysis, Verdantix reviews market news to identify trends in regional growth. Combining our analysis and further research, we find that:

- **Consulting subject expertise is crucial for EHS risk management and digitization support.**

Specialized consultants generally possess extensive knowledge of regulatory requirements, industry best practices, and emerging trends in EHS management. This expertise is essential for ensuring compliance and for implementing effective risk mitigation strategies. Consultants offer an objective perspective, free from internal biases, allowing them to identify gaps and areas for improvement in an organization's EHS processes. They also provide valuable benchmarking data, enabling firms to compare their EHS performance against industry standards. In the context of digitization, consultants have a strong understanding of the latest technologies, helping businesses leverage digital tools for enhanced EHS practices. EY, for instance, offers a tool called the EHS Maturity Model, which assesses the maturity of an organization's EHS risk management programme, providing recommendations for improvement in areas such as strategy, leadership, risk management and technology. With the guidance of consultants, organizations can select, implement and manage digital systems more effectively. Ultimately, consulting expertise leads to more robust and sustainable EHS practices, reducing risks, improving compliance and optimizing resource allocation.

- **Corporates rely on third-party services for specialized EHS compliance tasks.**

Specialized environmental and operational consulting firms such as ALL4, dss+ and ERM are experiencing high demand, due to increasingly stringent regulations that require businesses to meet environmental and sustainability standards. These specialized consulting firms possess extensive expertise in the EHS market and can provide valuable support to organizations in navigating complex regulatory requirements, managing environmental impact, and achieving EHS compliance. For example, ERM recently collaborated with an agricultural manufacturing client to successfully remediate a contaminated site, resulting in the surrender of the environmental permit and the preparation of the site for future development. Recognized for their exceptional subject-matter knowledge, these firms are the preferred choice for organizations seeking third-party assistance in addressing environmental and sustainability challenges. Their services play a crucial role in enabling effective risk management and driving improvements in overall environmental performance.



- **Services firms with advanced technological capabilities are vital for EHS digitization.**

Firms with advanced technological capabilities drive digital transformation in EHS. These vendors offer a range of services, such as data management and analytics, integration, compliance management, cyber security and scalable support. They provide vital support to businesses seeking to leverage technology to enhance EHS performance, improve operational efficiency and achieve EHS goals. Deloitte collaborated with Reckitt, a British multinational consumer goods business, to provide AI-driven training using digital-twinning simulation tools. The support provided by these service firms during digital EHS transformation projects enhances brand preference and awareness, with their innovative solutions and seamless integration capabilities establishing them as top performers.



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