ISHN State of the Industry Study

October 2016
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Study Overview
Background and Objectives

**Background**

The ISHN team approached BNP Media’s Market Research Division to conduct a study to understand the current state of health and safety profession and the perceived challenges and goals for the industry. BNP Media’s Market Research Division, was therefore commissioned to conduct the State of the Industry Study in order to provide detailed information on these aspects.

**Objectives**

The key objectives for this study are to determine:

- The resource allocation plans towards health and safety
- Perceived health and safety-related challenges and goals
- Current job satisfaction and security of employees
Sampling and Methodology

**Study Details**

**Target Audience:** Active, qualified subscribers of ISHN’s print and digital offerings

**Sample Selection:** A random selection of subscribers on Nth basis

**Survey Method:** Web

**Incentive:** Three (3) $100 gift cards

**Fieldwork Dates:** September 27 – October 11, 2016

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**Data Tabulation and Presentation**

All closed-ended numerical data is tabulated using SPSS (a statistical software package), while open-ended questions are either summarized, coded or included as written by respondents, as appropriate.

Sample sizes may vary throughout the report due to skip logic, data cleaning or missing responses. Some totals may not equal 100% due to rounding.

Be sure to consult with the Market Research group before using results from this study for external purposes (i.e. sales, promotional materials, editorial/content, etc.).

Differences between respondent groups, where applicable, are noted in colored callout boxes.

---

**Fieldwork Summary**

<table>
<thead>
<tr>
<th>Fieldwork Summary</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Number Contacted</td>
<td>13,985</td>
</tr>
<tr>
<td>Undeliverable/Opt Out</td>
<td>967</td>
</tr>
<tr>
<td>Usable Base</td>
<td>13,018</td>
</tr>
<tr>
<td>Attempted Surveys(^1)</td>
<td>197</td>
</tr>
<tr>
<td>Response Rate(^2)</td>
<td>1.51%</td>
</tr>
<tr>
<td>Usable Completes(^3)</td>
<td>196</td>
</tr>
<tr>
<td>Incidence(^4)</td>
<td>99.49%</td>
</tr>
</tbody>
</table>

\(^1\) Total number of respondents who have either completed or did not qualify for the research

\(^2\) Percentage of usable base that responded to the survey

\(^3\) Total number of completed surveys after data cleaning

\(^4\) Percentage of the total attempted surveys that qualified for the research
### Executive Summary

#### Job-Related Aspects
- Safety department mostly reports to one or two job functions on average, mostly the Owner/CEO, followed by Operations and/or Human Resources.
- Two-thirds of respondents are highly satisfied and feel secure with their jobs.
- The majority of respondents draw an annual gross salary over $50,000.
- Over half of respondents expect an increase in their salaries, 38% do not expect any change next year.

#### 2017 Health/Safety Resource Allocation
- Team size mostly expected to remain the same, 26% expect an increase.
- Budgets likely to increase slightly, mostly in construction safety than other industries.

#### Top Challenges, Hazards and Goals:
- **Top challenges:**
  - Employee behavior reliability
  - Putting safety on equal footing with production
  - Employee safety training
- **Top most serious hazards:**
  - Ergonomic-related injuries
  - Falls
  - Hand-arm injuries
  - Employee lifestyle-related health issues
- **Top safety-related goals:**
  - Build and/or maintain a safety culture
  - Reduce serious injuries and fatalities
  - Lower OSHA recordable incident rate

#### Technology Usage:
- 63% of respondents use social media websites, LinkedIn being the most popular.
- Over half of respondents expect use of smartphones, tablet devices, safety apps to increase in the next 2-3 years.
Over two-thirds of respondents work in privately owned companies within a variety of industries with government, construction and fabricated metal products manufacturing being the most common.

**Type of Industry**

- Government: 11%
- Building materials and construction: 10%
- Fabricated metal products: 10%
- Chemicals & allied products: 7%
- Petroleum refining, oil/gas, coal: 7%
- Utility: 7%
- Food & kindred products: 6%
- Distributor: 6%
- Machinery: 4%
- Transportation equipment: 4%
- Wholesaler/Retailer: 4%
- Plastics & rubber: 3%
- Any electrical equipment, appliances & components: 2%
- Printing, publishing & allied industries: 2%
- Freight forwarder: 2%
- Primary metals: 2%
- Textile mill products: 1%
- Wood, pulp/paper & allied products: 1%
- Mining: 1%
- Computer & electronics products: 0%
- Furniture & fixtures: 0%
- Other: 14%

**Other Mentions:**
- Consultant: 7
- Education: 2
- Healthcare: 2
- Non-profit: 2
- Calibration Lab: 2
- Contractor: 2
- Engineering firm: 2
- Gasification, NG R&D: 2
- General safety: 2
- Lights & sirens: 2
- OEM: 2
- Optics and optical systems: 2
- Safety and health training: 2
- Safety equipment: 2
- Safety products: 2
- Sensors manufacturing - defense: 2
- Small engine manufacturing: 2
- Specialty Millworks: 2

**Type of Company**

- Publicly held: 31%
- Privately owned: 69%

n=196

*Titles shortened to fit on the slide

Q105. Which of the following best describes the business/industry in which you work?

Q110. Which of the following closely defines the type of organization you work for?
Health and Safety-Specific Aspects
Over a third of respondents indicated that their safety department reports to the CEO/Owner of the organization and/or Operations, followed by 26% who indicate safety reporting to Human Resources.

**Job Functions Safety Reports To**

- CEO/Owner: 40%
- Operations: 36%
- Human Resources: 26%
- Quality: 9%
- Environmental: 8%
- Engineering: 8%
- Legal: 5%
- Sales and marketing: 3%
- Purchasing: 2%
- Other: 5%

More among smaller companies (under 500 employees) and privately held companies

Average number of departments safety reports to = 1.44

Other Mentions:
- Corporate health, safety and environmental (HSE)
- Energy and construction
- General Manager
- Local Resource Leader
- Manager
- Manufacturing
- Non-production Manager
- Occupational Health & Safety (OHS)
- Risk management
- Training committee

n=196

Q507. Which of the following department(s)/position(s) does the safety department report to, in your organization? (Select all that apply)
The majority of respondents expect the health and safety team size at their facility to remain the same next year, while 44% expect an increase in health and safety budget in 2017.

**Expected Change in Team Size**
- Increase significantly: 3%
- Increase slightly: 23%
- Remain the same: 69%
- Decrease slightly: 5%
- Decrease significantly: 1%

**Top 2 Box**
- Increase slightly: 26%

**Expected Change in Budget**
- Increase significantly: 2%
- Increase slightly: 42%
- Remain the same: 43%
- Decrease slightly: 12%
- Decrease significantly: 1%

**Top 2 Box**
- Increase slightly: 44%

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Q205. In 2017, how do you expect the number of employees on the health and safety-related staff/team at your facility to change?
Q215. Compared to this year, how do you expect the safety and health budget at your organization to change in 2017?
The majority of respondents do not foresee a change in resources their companies would commit towards employee health and safety, while a third share a positive sentiment, expecting an increase in resources.

Q210. Compared to this year, how do you see your company committing resources toward improving the health and safety of employees in year 2017?

- Same amount of resources: 60%
- More resources: 33%
- Less resources: 7%

More in construction industry than manufacturing, mining, utility and government type of businesses
The median annual gross salary is $75,000. Over half of respondents expect an increase in their salaries next year while 38% do not expect any change.

**Current Annual Gross Salary**
(Mean percentages reported)

- Less than $35,000: 7%
- $35,001 to $50,000: 14%
- $50,001 to $75,000: 30%
- $75,001 to $100,000: 24%
- More than $100,000: 25%

**Change in Gross Salary**

- Much higher: 3%
- Slightly higher: 54%
- No change: 38%
- Slightly lower: 4%
- Much lower: 1%

n=107

"Prefer not to answer" responses removed for analysis purposes

1Top 2 box (Slightly higher/Much higher)

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Q520. What is your current annual gross salary?
Q525. How do you expect your annual gross salary to change in 2017 compared to 2016?
62% of respondents are satisfied and/or feel secure with their job and the majority of respondents expect their job security and satisfaction with respect to health and safety to remain the same in 2017.

**Job Security and Satisfaction Rating**

- **Job Satisfaction**: 62% satisfied
- **Job Security**: 62% secure

**Chart:**

- **Job Satisfaction**
  - Improve: 19%
  - Remain the same: 76%
  - Worsen: 6%
- **Job Security**
  - Improve: 14%
  - Remain the same: 76%
  - Worsen: 10%

*Fewer respondents with mining & utility industries*

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Q220. Please rate the following with respect to your current job.

Q225. How will the following change in 2017 compared to this year with respect to the health & safety aspect of your job?
Perceived Challenges, Hazards and Goals
Half or more respondents perceive employee behavior reliability, putting safety on equal footing with production and/or employee safety training to have a high impact on an organization’s health and safety operations.

### Perceived Impact of Challenges

<table>
<thead>
<tr>
<th>Challenge</th>
<th>Low impact</th>
<th>Medium impact</th>
<th>High impact</th>
</tr>
</thead>
<tbody>
<tr>
<td>Employee behavior reliability/consistent safe behaviors</td>
<td>14%</td>
<td>35%</td>
<td>52%</td>
</tr>
<tr>
<td>Putting safety on equal footing with production</td>
<td>15%</td>
<td>33%</td>
<td>52%</td>
</tr>
<tr>
<td>Safety training of employees</td>
<td>12%</td>
<td>38%</td>
<td>50%</td>
</tr>
<tr>
<td>Getting senior leadership “buy in” for safety and health*</td>
<td>25%</td>
<td>28%</td>
<td>47%</td>
</tr>
<tr>
<td>OSHA compliance</td>
<td>24%</td>
<td>34%</td>
<td>42%</td>
</tr>
<tr>
<td>Putting safety as part of corporate sustainability activities*</td>
<td>26%</td>
<td>36%</td>
<td>39%</td>
</tr>
<tr>
<td>Aging workforce</td>
<td>24%</td>
<td>43%</td>
<td>33%</td>
</tr>
<tr>
<td>Your safety job-related expanding workload</td>
<td>20%</td>
<td>52%</td>
<td>28%</td>
</tr>
<tr>
<td>Contractor oversight safety</td>
<td>38%</td>
<td>37%</td>
<td>25%</td>
</tr>
<tr>
<td>Temporary worker safety</td>
<td>45%</td>
<td>30%</td>
<td>24%</td>
</tr>
<tr>
<td>Your own personal increasing job stress</td>
<td>33%</td>
<td>44%</td>
<td>23%</td>
</tr>
<tr>
<td>Your job-related expanding work hours</td>
<td>38%</td>
<td>41%</td>
<td>20%</td>
</tr>
<tr>
<td>Employees' legal use of controlled substances/medications</td>
<td>62%</td>
<td>24%</td>
<td>14%</td>
</tr>
<tr>
<td>Supply chain safety management</td>
<td>59%</td>
<td>31%</td>
<td>11%</td>
</tr>
<tr>
<td>Employee illegal substance abuse</td>
<td>66%</td>
<td>26%</td>
<td>9%</td>
</tr>
<tr>
<td>Off-the-job injuries</td>
<td>62%</td>
<td>30%</td>
<td>8%</td>
</tr>
</tbody>
</table>

n=196

*Titles shortened to fit on the slide

Q302. To what extent do each of the following challenges impact your organization’s health and safety operations?
44% of respondents identify ergonomic-related injuries to be the most hazardous, followed by over a third of respondents considering falls, hand-arm injuries or employee lifestyle-related issues as the most serious hazards.

Q310. Which of the following do you consider to be the most serious hazards in your facility next year? (Select all that apply)
Building and maintaining a safety culture, reducing serious injuries and fatalities and lowering the OSHA recordable incident rate are most likely to be high priority health and safety goals for respondents’ organizations.

<table>
<thead>
<tr>
<th>Future Health and Safety Goals</th>
<th>Top Priorities</th>
<th>Medium Priorities</th>
<th>Least Priorities</th>
</tr>
</thead>
<tbody>
<tr>
<td>Build and/or maintain a safety culture</td>
<td>56%</td>
<td>31%</td>
<td>13%</td>
</tr>
<tr>
<td>Reduce serious injuries and fatalities</td>
<td>56%</td>
<td>24%</td>
<td>20%</td>
</tr>
<tr>
<td>Lower OSHA recordable incident rate</td>
<td>53%</td>
<td>22%</td>
<td>25%</td>
</tr>
<tr>
<td>Lower workers’ compensation cost</td>
<td>43%</td>
<td>27%</td>
<td>30%</td>
</tr>
<tr>
<td>Get senior leadership safety and health buy-in</td>
<td>39%</td>
<td>31%</td>
<td>31%</td>
</tr>
<tr>
<td>Developing and tracking safety performance indicators*</td>
<td>34%</td>
<td>39%</td>
<td>28%</td>
</tr>
<tr>
<td>Develop your personal leadership skills</td>
<td>32%</td>
<td>33%</td>
<td>28%</td>
</tr>
<tr>
<td>Implement/Maintain behavior-based safety program</td>
<td>28%</td>
<td>35%</td>
<td>38%</td>
</tr>
<tr>
<td>Select/Purchase/Use effective, updated PPE*</td>
<td>28%</td>
<td>46%</td>
<td>38%</td>
</tr>
<tr>
<td>Build/Maintain a formal safety-health mgt. system*</td>
<td>27%</td>
<td>33%</td>
<td>40%</td>
</tr>
<tr>
<td>Develop/Maintain employee wellness program*</td>
<td>27%</td>
<td>34%</td>
<td>39%</td>
</tr>
<tr>
<td>Reducing employee absenteeism</td>
<td>22%</td>
<td>23%</td>
<td>55%</td>
</tr>
<tr>
<td>Prevent on the job violence</td>
<td>19%</td>
<td>26%</td>
<td>55%</td>
</tr>
<tr>
<td>Safety and health incentive programs</td>
<td>19%</td>
<td>29%</td>
<td>52%</td>
</tr>
<tr>
<td>Temporary/Independent contractor safety*</td>
<td>19%</td>
<td>35%</td>
<td>46%</td>
</tr>
<tr>
<td>Reduce employee fatigue</td>
<td>17%</td>
<td>37%</td>
<td>46%</td>
</tr>
<tr>
<td>Select/Purchase/Use effective, updated chemical exposure instruments*</td>
<td>12%</td>
<td>29%</td>
<td>59%</td>
</tr>
</tbody>
</table>

n=196
*Titles shortened to fit on the slide

Q315. For each of the following safety and health-related goals, please indicate whether you envision it being your organization’s high/medium/low priority for next year.
Media Usage and Technology
63% of respondents plan to use social media websites for health and safety related updates, with LinkedIn emerging as the most likely to be used website, followed by professional association membership apps and YouTube.

**Social media Usage for Health and Safety-Related Updates**

- LinkedIn: 41%
- Professional association membership apps: 34%
- Youtube: 26%
- Google+: 20%
- Facebook: 19%
- Twitter: 8%
- Instagram: 3%
- Pinterest: 2%
- Snapchat: 1%
- Tumblr: 1%
- Other: 3%

**Q405. Which of the following social media websites do you plan to use, to obtain and share health and safety-related updates? (Select all that apply)**

n=196
Adoption of Technology

Over half of respondents expect an increase in the use of smartphones, tablet devices and safety apps in the next 2-3 years; while 44% of respondents expect an increasing emphasis on being an in-house safety consultant/coach.

<table>
<thead>
<tr>
<th></th>
<th>Increase</th>
<th>Remain the same</th>
<th>Decrease</th>
</tr>
</thead>
<tbody>
<tr>
<td>Use of smartphones, tablet devices, safety apps, etc.</td>
<td>56%</td>
<td>39%</td>
<td>5%</td>
</tr>
<tr>
<td>Emphasis on being an in-house safety consultant, advisor, coach</td>
<td>44%</td>
<td>55%</td>
<td>2%</td>
</tr>
<tr>
<td>Use of wearable safety and health-related technology by employees</td>
<td>36%</td>
<td>63%</td>
<td>1%</td>
</tr>
<tr>
<td>Emphasis on playing the “safety cop”</td>
<td>15%</td>
<td>56%</td>
<td>29%</td>
</tr>
</tbody>
</table>

n=196

Q410. Compared to this year, how do you envision the following to change in the next 2-3 years?
38% - 40% of respondents envision their organizations to get more involved with sustainability and/or employee wellness/health promotion initiatives in the next 2-3 years.

<table>
<thead>
<tr>
<th>Initiative</th>
<th>More</th>
<th>Same</th>
<th>Less</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sustainability</td>
<td>40%</td>
<td>57%</td>
<td>3%</td>
</tr>
<tr>
<td>Employee wellness and health promotion</td>
<td>38%</td>
<td>58%</td>
<td>4%</td>
</tr>
<tr>
<td>International safety issues</td>
<td>18%</td>
<td>65%</td>
<td>16%</td>
</tr>
<tr>
<td>Supply chain management</td>
<td>17%</td>
<td>73%</td>
<td>9%</td>
</tr>
</tbody>
</table>
Respondent Profile

Gender

- Male: 84%
- Female: 16%

Age

- 18 to 29 years old: 1%
- 30 to 39 years old: 13%
- 40 to 49 years old: 19%
- 50 to 59 years old: 35%
- 60 to 69 years old: 29%
- 70 years old or older: 3%

Mean Age: 53

Industry Experience

- Less than 1 year: 2%
- 1 - 3 years: 8%
- 4 - 10 years: 21%
- 11 - 20 years: 25%
- 21 - 30 years: 28%
- 31 - 40 years: 14%
- 41 - 50 years: 1%
- More than 50 years: 1%

n=194

Job Function

- Safety: 45%
- Corporate/Executive management: 19%
- Engineering: 7%
- Environmental: 7%
- Industrial hygiene: 5%
- Sales & marketing: 4%
- Purchasing: 1%
- Other: 12%

n=196, unless otherwise stated | 1“Prefer not to answer/Don’t know” removed for analysis purposes

- Quality assurance (3)
- Safety & environmental (3)
- Director of facilities
- Education
- EHS and quality management specialist
- Emergency management
- First aid, work comp, safety assistant
- Management systems
- Operations & Safety Manager
- Project Manager
- R&D
- Rigging liaison
- Safety, environmental, Industrial hygiene and HR
- Security
- Service Administrator
- Sr. Executive Assistant
- Supervisor
- Work compensation/Benefits

Q502. In what year were you born?
Q505. What best describes your job function?
Q510. How many years of experience do you have in the environmental, health and safety industry?
### Annual Revenue

<table>
<thead>
<tr>
<th>Revenue Range</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>$100,000 or less</td>
<td>1%</td>
</tr>
<tr>
<td>$100,001 - $500,000</td>
<td>6%</td>
</tr>
<tr>
<td>$500,001 - $1,000,000</td>
<td>5%</td>
</tr>
<tr>
<td>$1,000,001 - $2,500,000</td>
<td>5%</td>
</tr>
<tr>
<td>$2,500,001 - $5,000,000</td>
<td>8%</td>
</tr>
<tr>
<td>$5,000,001 - $10,000,000</td>
<td>8%</td>
</tr>
<tr>
<td>$10,000,001 - $50,000,000</td>
<td>22%</td>
</tr>
<tr>
<td>$50,000,001 - $100,000,000</td>
<td>8%</td>
</tr>
<tr>
<td>$100,000,001 - $500,000,000</td>
<td>8%</td>
</tr>
<tr>
<td>$500,000,001 - $1,000,000,000</td>
<td>5%</td>
</tr>
<tr>
<td>More than $1,000,000,000</td>
<td>23%</td>
</tr>
</tbody>
</table>

n=132

### Company Size

<table>
<thead>
<tr>
<th>Employee Range</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Less than 10 employees</td>
<td>7%</td>
</tr>
<tr>
<td>10 - 25 employees</td>
<td>7%</td>
</tr>
<tr>
<td>26 - 50 employees</td>
<td>6%</td>
</tr>
<tr>
<td>51 - 100 employees</td>
<td>10%</td>
</tr>
<tr>
<td>101 - 250 employees</td>
<td>15%</td>
</tr>
<tr>
<td>251 - 500 employees</td>
<td>14%</td>
</tr>
<tr>
<td>501 - 1,000 employees</td>
<td>7%</td>
</tr>
<tr>
<td>1,001 – 2,500 employees</td>
<td>11%</td>
</tr>
<tr>
<td>2,501 – 5,000 employees</td>
<td>6%</td>
</tr>
<tr>
<td>5,001 – 10,000 employees</td>
<td>5%</td>
</tr>
<tr>
<td>More than 10,000 employees</td>
<td>13%</td>
</tr>
</tbody>
</table>

n=192

Total respondents=n

1*Prefer not to answer/Don’t know” removed for analysis purposes
Q517. In what state do you currently live?

- Midwest: 31%
- Northeast: 17%
- South: 31%
- West: 19%
- U.S. Territory: 3%

n=195
Missing response removed
Contact Us

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