environmentanalyst

GLOBAL MARKET INTELLIGENCE SERVICE

Global Environmental Consulting Market

SAMPLE REPORT

2019

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Thanks to the environmental consulting firms that have assisted us by responding to our surveys, participating in email/phone/face-to-face interviews and verifying/commenting on their company profiles.

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6. Financial trends

- **Average global revenue growth inched up to 2.6% in 2018, with large players enjoying significantly improved fortunes.** Global EC revenues for the survey sample increased by a mean (unweighted) average of 2.6% in 2018, up from 2.2% in 2017. This compares to the IMF's reported level of global economic growth for last year at 3.6% and also represents a slightly more optimistic outlook compared to the 2.2% as forecast for 2018 by last year's survey participants.
- **Reversal of last year's trend with large firms outperforming smaller ones** - crucially the tables have turned yet again with smaller consultancies (with EC revenues <$15m) reporting a modest 1.3% growth against a more bullish 4.1% for the large consultancies (>$15m EC revenues), in contrast with 2.7% growth and 1.6% growth respectively in 2017. This indicates a strong upward swing for the larger EC practices year-on-year, and a continuation of the see-saw fortunes experienced by this group during the period we have undertaken this survey (see figures below). Although growth expectations for the next couple of years are quite similar, whether large or small.

Fig 5 Average global revenue growth, 2010-2020e

SOURCE: ENVIRONMENT ANALYST

- **One-fifth of firms see negati**[redacted] overall positive average gr[redacted] contracted revenue last [redacted] to see year-on-year in[redacted] 64% in the same po[redacted] year).
- **Over 80% of f**[redacted] business p[redacted] began to[redacted] excee[redacted] a f[redacted]

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7. Staff trends & fee rates

7.1 Human resources - trends in redundancy & recruitment

Fig 11 Change in employee numbers over last 12 months

Fig 32 Mean revenue prospects across first 5 of 15 client sectors, comparison 2010-2019

SOURCE: ENVIRONMENT ANALYST

*This chart compares the mean forecast revenue growth from respondents to this year's ma
with the same question over the years we have run the survey

Fig 33 Mean revenue prospects across second 5 of 15 client sectors, comp

SOURCE: ENVIRO

*This chart
with the

Fig 40 Strategic business drivers for next 5 years across third 5 of 19 drivers, comparison 2010-2019

SOURCE: ENVIRONMENT ANALYST

* % of respondents stating the issue is a driver or significant driver in next few years

10.Market forecast trends

In this section, we present the growth forecasts made by environment[redacted] response to the market trends survey carried out during the first hal[redacted] country's EC sector and the global EC market as whole, and also [redacted]

In *Environment Analyst's* separate Global Environmental Stra[redacted] the year), we will present its own market forecasts for the [redacted] account consultants' growth estimates presented in thi[redacted] economic indicators, historic market demand pattern[redacted] also the Global Market Intelligence Service news flo[redacted] constraints.

10.1 Own country market trend[redacted]

- **Business confidence gener**[redacted] managers were asked to [redacted] prospects for 2019 an[redacted] qualitative assessm[redacted] last, up from 78% [redacted] anticipate a w[redacted]
- **Even highe**[redacted] with 95% [redacted] curren[redacted]
- **Sm**[redacted]

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Fig 43 Own country mean annual revenue growth expectations, 2019-2023

Fig 44 Own country mean annual revenue growth expectations, comparison 2010-20

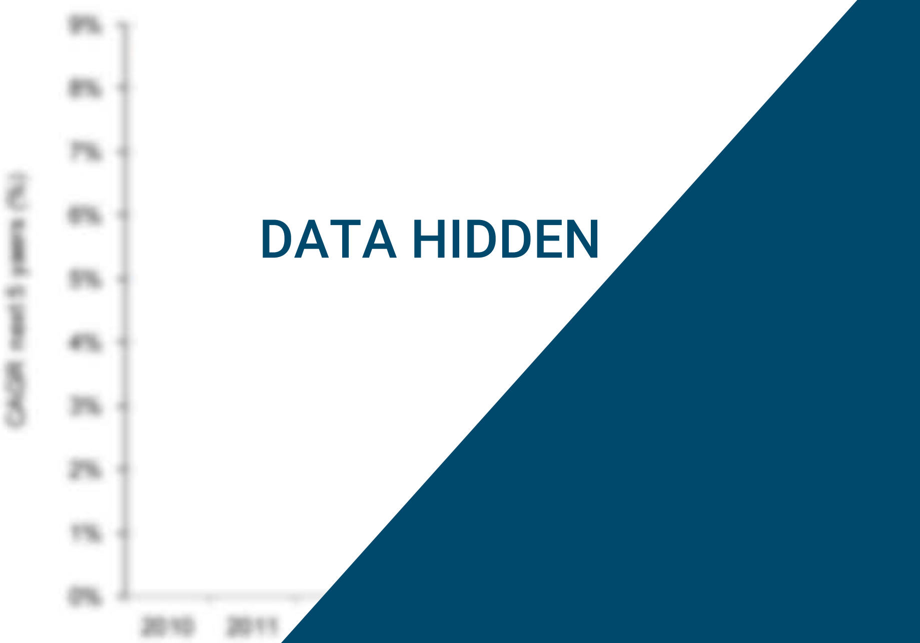
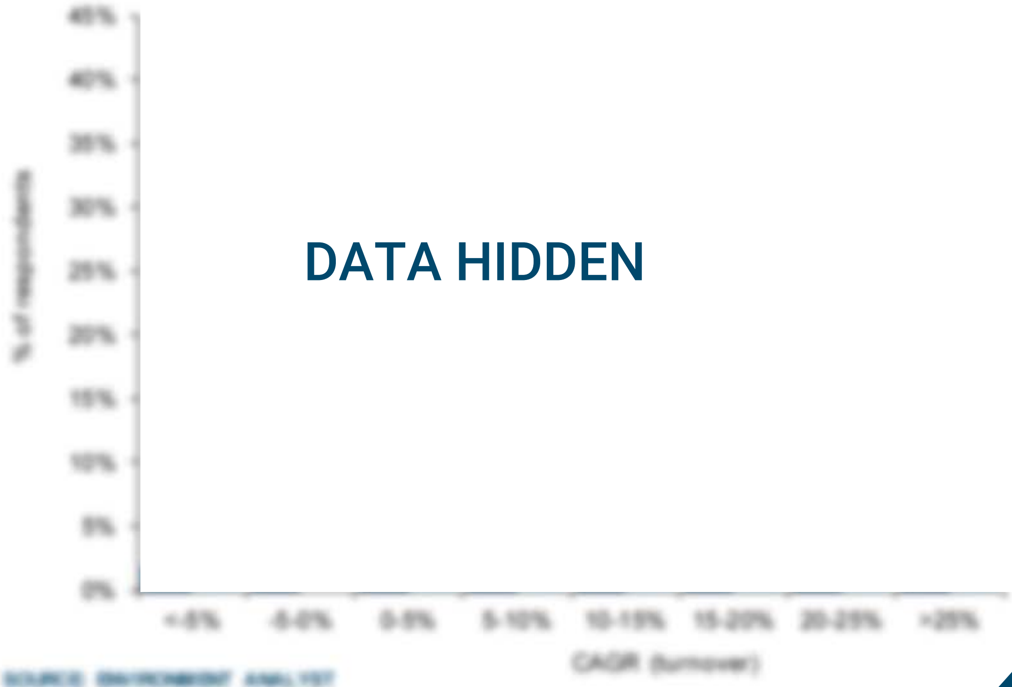


Fig 48 Global annual growth expectations for next 5 years



10.3 Global regional growth prospects