

Safety Landscape in North America During COVID-19

2020

INTRODUCTION

Needless to say, this year has been a challenging year for all. Especially challenging for safety leaders as they navigate COVID-19 and work to keep their workforce safe during a global pandemic.

Businesses in every sector were forced to suddenly shut down and send everyone home. Most were able to re-open but did so in a new world and a new normal.

They now had to add a new focus on sanitization, social distancing, and PPE into their day-to-day operations and safety procedures.

FINDING THE 'NEW NORMAL' FOR SAFETY

Alcumus eCompliance took this opportunity to gain an understanding of the safety landscape across North America.

We partnered with a research firm in August and September of 2020 to conduct an industry-wide survey of senior managers, directors, and other safety professionals. This survey was completed by over 800 companies in the U.S. and Canada, giving unprecedented insights from small, medium, and enterprise businesses in a wide variety of high-risk industries.

Not only did we want to comprehend the safety market landscape in 2020, we wanted to measure the impact of a digital EHS solution on organizations today.

For this reason, we conducted a Customer Impact Survey with our customer base to evaluate how their safety cultures have been affected since implementing a digital EHS solution and whether the challenges highlighted by our research could be solved.

Our goals were to:

- Gain an understanding of the current attitudes towards health and safety provisions during this global pandemic
- Attempt to understand the business challenges in safety across North America
- Gauge the relative value of different health and safety product solutions
- Measure the impact of a digital safety software solution on incident and injury rates

This eBook will explore our findings and paint a clear picture of the current state of today's safety landscape.

THE ATTITUDE TOWARDS HEALTH AND SAFETY COMPLIANCE

We began by attempting to gain a broad overview of the general attitudes towards safety in today's market.

Our survey asked safety leaders which of the following statements best described their organization's attitude towards health and safety:

1. Tick box exercise and not of significant importance to us
2. Important for us and for people we work with to be able to show we are compliant
3. An area which is very important and one which we want to stay completely on top of
4. An area where we want to be more efficient in our time and processes
5. An area of extreme importance and one where we think we can demonstrate a competitive advantage

Findings

Our data reveals a connection between the size of the organization and the attention given towards safety.

33% of smaller companies (1-4 employees) said safety was a “Tick box exercise and not of significant importance to us.”

Meanwhile, larger businesses (100+ employees) placed much higher importance on safety, with 40% saying they want to be more efficient or see it as a potential competitive advantage.

Key Takeaways

This delineation is quite significant but does not come as a surprise. Smaller companies are often just getting started and therefore, work on smaller jobs. Their clients are not particularly interested in their safety record, industry certification, or unionization, and are mainly focused on getting the job done.

On the other hand, larger companies frequently find themselves competing against other large companies for major projects in a bid/tender process. Industry-certified safety cultures are often the bare minimum for consideration for high-end projects and contracts.

TODAY'S SAFETY CHALLENGES

Where are today's safety leaders struggling? Are they meeting friction when trying to gain frontline buy-in to safety? Or are they not getting the support they need from upper management or the C-level?

Our survey asked safety leaders which of the following issues they were struggling with:

- Time-consuming / manual H&S processes
- Paper forms
- Lack of standard safety protocols
- Poor safety culture within management

- Poor safety culture within employees
- Lack of company structure & awareness
- Poor safety measures
- Lack of accessible H&S data
- Lack of clear indicators
- Lack of employee empowerment
- No adoption protocols on the frontlines

Respondents were allowed to tick more than one box. We found there was a direct connection between the size of the organization and the number of challenges they selected.

Smaller businesses selected an average of 1.4 challenges per respondent, while businesses with 100+ employees selected an average of 2.3.

Findings

Our data shows smaller businesses are still largely struggling with paper-based systems. Small business respondents were more than twice as likely to list this as a challenge than any other group. At the same time, paper-based safety systems were most prevalent in the following sectors:

- Energy
- Construction
- Retail

Safety leaders representing every sector and size all universally listed time-consuming processes as a major challenge, right across the board. Meanwhile, safety leaders in the logistics sector were more likely to struggle with a lack of standard safety protocols and poor safety culture within management.

Key Takeaways

Most smaller businesses likely rely on paper-based solutions because most do not have the revenue to justify a digital EHS solution. At the same time, anyone who currently works in construction or energy can likely vouch for the continued prevalence of paper-based systems, and the problems this creates.

Safety leaders at larger companies selected more challenges because their roles and safety demands are more complex. They are in charge of ensuring a large workforce remains compliant and safe at all times, so they are more likely to feel they would like to see improvement in nearly all areas.

These safety leaders find it necessary to get in the minutia of the safety data and know every single leading and lagging indicator.

TOOLS OF THE TRADE: HOW ARE TODAY'S COMPANIES MANAGING SAFETY?

We also examined the tools and techniques safety leaders were using to meet these challenges, including the impact Alcumus eCompliance has had on organizations today.

Less than a quarter of small businesses (17% in Canada and 22% in the US, respectively) are utilizing some sort of third party assistance. At the same time, more than 4 out of 5 of the large companies we surveyed (85% in the US and 80% in Canada, respectively) were using a third party.

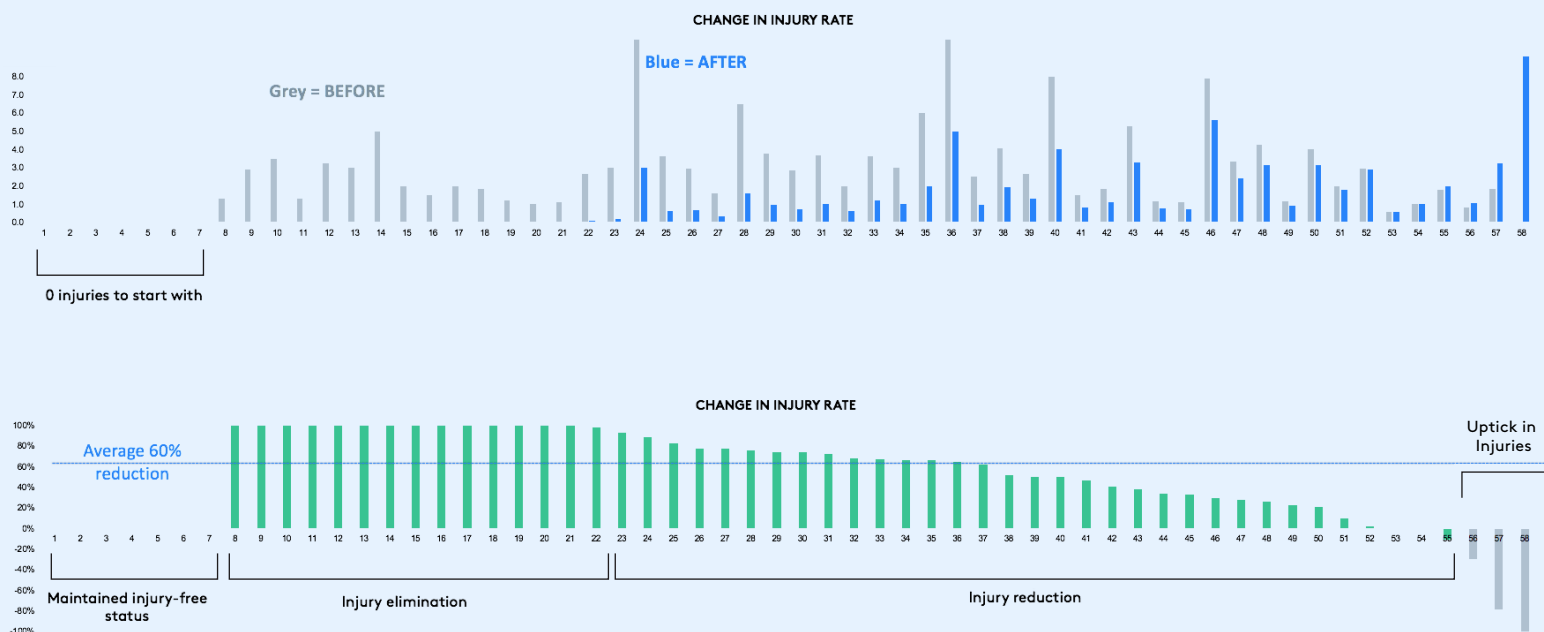
Interestingly, we saw a significant spike between companies with 5-20 employees and 21-100 employees. Those numbers doubled from 40% to 80%.

For safety professionals who were using Alcumus eCompliance, we discovered the following:

- Alcumus eCompliance customers have reduced their injury rates by 60%, on average
- 24% of customers have achieved zero ("0") incidents since implementing the Alcumus eCompliance software
- 90% of customers have improved their safety record by implementing the Alcumus eCompliance software

After speaking with a number of customers, we were able to measure the impact the Alcumus eCompliance digital EHS solution has had with a targeted question within our Customer Impact Survey highlighting the key trailing injury statistic used by the organization.

Then we measured injury rates of the organization when they first started implementing Alcumus eCompliance vs. today. Here's what we found:



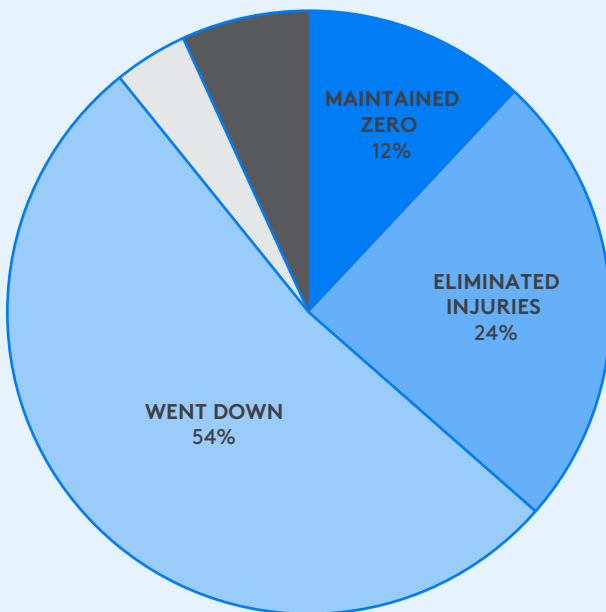
* Companies with increase in injury rates fell into two camps: 1) uptick from relatively low base (e.g. TRIF of 0.8 → 1.0) or 2) went from injury free to multiple claims associated with one employee

The grey bars in the graph on the previous page signify before customers started using Alcumus eCompliance, and the blue bars represent the organization's recent reporting period after using our digital EHS solution.

The "Change in Injury Rates" are an amalgamation of Total Recordable Injury Frequency (TRIF), Total Recordable Incident Rate (TRIR), and Lost Time Injury Rate (LTIR). It is clear injuries have decreased over time. This is captured more closely in the bottom graph where it displays the average reduction rate of injuries is 60%.

What's even more incredible is 1 in 4 organizations, or 24% of customers have seen zero incidents since implementing Alcumus eCompliance and have significantly eliminated injuries.

CHANGE IN INJURY RATE



One customer said, "The use of Alcumus eCompliance over the last several years has allowed us to target areas of our program where we were experiencing repetitive incidents. In turn this has allowed us to help bring our TRIF score down."

Because these safety professionals had access to a digital EHS solution, they were able to gain complete transparency into their safety program, making it a seamless process to pinpoint areas where improvements were needed, resulting in a safer workplace.

PERSONNEL AND SYSTEMS: WHICH IS MORE IMPORTANT TO SAFETY?

As a whole, most respondents felt good safety cultures are made of a strong combination of the two elements working together harmoniously. However, we saw slightly different results from each country we surveyed.

Findings

The U.S:

- 9% Mainly systems
- 33% Mainly personnel
- 58% A combination of people & systems

Canada:

- 8% Mainly systems
- 29% Mainly personnel
- 63% A combination of people & systems

The UK:

- 9% Mainly systems
- 20% Mainly personnel
- 71% A combination of people & systems

Key Takeaways

The overwhelming majority of safety professionals feel safety success comes from the right people having the right tools and processes. We couldn't agree more!

However, it was interesting to see how many safety leaders leaned slightly more towards personnel, or slightly more towards systems.

WHAT ARE THE SUCCESS FACTORS DRIVING SAFETY PERFORMANCE?

When asked the previous question, our Customer Impact Survey presented interesting findings showcasing the impact the Alcumus eCompliance software has had on their business.

Findings

- "Having an executive management team that supports safety initiatives, does not compromise on safety."
- "Focusing on leading indicators and having strong executive management commitment from those who understand the impact of safety on business performance and operational excellence."
- "The real-time data has been a game changer. We are now able to trend data and present it in the next month."
- "Being transparent and genuine with employees and over-communicating."

Key Takeaways

Three key factors to assist in driving safety performance, evident in our customer feedback, are an invested leadership team, the right programs and systems in place, as well as a strong safety culture. These takeaways are a critical piece of information, as they align with our research findings presented earlier.

2021 AND BEYOND: WHAT DOES THE FUTURE HOLD?

Looking towards the future of safety in the years to come, it's clear having visibility into all things safety is a must.

When we posed the question: "Any safety trends or opportunities we should be thinking about as we gear up for 2021?", the following themes were highlighted:

- A strong pandemic response incorporated within the safety program
- An elevated safety culture which includes positive recognition, increased employee engagement, and a focus on mental health
- The use of artificial intelligence video feed, voice input, and other forms of cutting-edge technology to handle remote observations and inspections

When asked: "What are the biggest safety challenges you'd like to be better equipped to face in 2021 and beyond?" these were our most prevalent findings:

- Data-driven accountability
- Proactive training and remote workforces
- Third-party relationships

With COVID-19 impacting our lives daily - at work and at home, it comes as no surprise a powerful pandemic response aligning with organizations' everyday processes is integral, along with tools to help reduce touchpoints and on-site COVID-19 related risks, such as remote workforces.

Real-time data is also critical in many ways. It can help you track trends and patterns, gauge safety performance, and gain greater insight into your organization's safety program overall.

CONCLUSION

The findings of our research confirms paper-based safety is an extremely prevalent challenge by most safety leaders going into 2021. This leads to the number one difficulty safety professionals are currently facing: time consuming and manual processes. Safety leaders need a tool to assist in engaging their front-line workforce to help them break free from the constraints of a paper-based system.

Concurrently, their leaders need access to real-time safety data to make proactive decisions. This will strengthen and improve their safety culture and reduce incidents and injuries on-site, instead of probing reactive decisions to rectify it. With 2021 on the horizon, a digital approach is no longer recommended, it's a necessity.

As a part of our Customer Impact Survey, we had the opportunity to hear from our customer base on their thoughts about implementing our digital EHS solution:

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When I access the Alcumus eCompliance system, it has all the answers I need. I'm getting the information and access to it far sooner than I ever was before, and I have so much more time on the operational end to do other things

– Heather Smith-Schenkey,
HSE Manager at South Country Co-op

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Alcumus eCompliance has helped South Country Co-op connect 700 employees across 57 sites and has centralized and digitized over one thousand documents, giving Heather and her team access to all information in seconds.

“Alcumus eCompliance has also been a major part of our culture and pushing it further. This software is a time saver, and a one stop access controlled repository for all things Health and Safety available 24/7!” - Mark Jared, the Health and Safety Director at Aim Environmental Group.

Aim Environmental, an Alcumus eCompliance customer since 2018, is in the organics processing industry and have found that this digital EHS solution has elevated their safety culture.

Alcumus eCompliance has allowed Mark and his team to strengthen their safety culture during the pandemic and it has brought their team closer together.

Stories like these are seen across our entire customer base as we have successfully made a positive impact on their workforce. Alcumus eCompliance gives safety leaders access to real-time safety data they need to spot trends, potential issues, and opportunities to improve during the current safety landscape.

These 360 insights can help in making more informed and data-driven high-level decisions, to reduce injuries by up to 60% and create a safer workplace.

Not only does it allow for a more proactive approach, but our mobile app also empowers front-line employees to quickly carry out crucial safety activities, like hazard assessments or equipment inspections, in a few quick taps on their smartphones. It also streamlines communication, strengthening your safety culture.



With these findings and key research employed by our team this year, it is evident going into 2021, safety leaders are still experiencing the following pain points:

1. Paper-based safety management leading to time consuming processes
2. Lack of front-line engagement
3. Impact of COVID-19 on both the frontlines and the office teams

Our findings from our Customer Impact Survey reiterate the crucial requirement of

needing a digital safety software solution to help solve not only the burden of a paper-based system and time consuming processes, but to improve safety in the workplace for all workers for years to come.

Implementing a digital safety solution can make a hallmark change on a business. All it takes is the decision to implement one.

Want to see what this can mean for your workplace?

Feel free to reach out to us at 1-800-686-1915, or [book a demo](#) with one of our Safety Experts today.



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