



STRIVING FOR EXCELLENCE

2024 HEALTH & SAFETY REPORT

**YOUR
SAFETY
EXPERTS**





CONFRONTING CHALLENGING TIMES

Environment, Health & Safety (EHS) professionals are largely confident in their organisation's ability to keep end-users and employees safe. But there are entrenched challenges they must overcome, while areas such as mental health and adequate Personal Protective Equipment (PPE) for women are also very much on the agenda.

Ryan Plummer, Senior Director at RS Safety Solutions

Welcome to our second annual Health & Safety Report, brought to you in conjunction with Health & Safety Matters (HSM).

Firstly, I'd like to thank those who took part in the survey, which attracted almost 900 respondents drawn from a wide cross-section of industries, professional experience and organisation size. Your input has been vital in helping to gain a snapshot of the EHS profession and judging how things have moved on since last year.

In a volatile environment, EHS is more important than ever to ensure businesses can operate responsibly and that employees can flourish. This report takes an in-depth look at the profession, outlining how confident those working in it feel and the challenges they anticipate over the next few months. It also explores some of the issues that must be confronted if organisations are to achieve their aim of ensuring people are adequately protected at work at all times.

There are three key themes we have focused on, which we hope will provide valuable insight into the issues facing those working in the health and safety space today:

Managing EHS capabilities

Encouragingly, 84 per cent of respondents rate the attitude towards managing EHS as either high or extremely high. 80 per cent of respondents rate the systems, reporting, leadership and governance for EHS as either high or extremely high. Organisations are also confident they are able to protect both end-users (89% rank their capabilities here highly) and employees (88%).

One emerging area is that of mental wellbeing. Three-quarters (76%) now have a focus on this and 55 per cent are confident in their capabilities. There is definite room for improvement here, but this is certainly an area that is now on the radar for EHS professionals.

Business strategy and compliance

While organisations are generally confident when it comes to their EHS capabilities, only 39 per cent believe they are operating at a high maturity level, with 54 per cent stating they are at a medium level of maturity. One reason for this could be the growing responsibility many in the EHS function have for environmental issues, which is new territory for many.

The main focus for those in the function, however, remains accident prevention, with 86 per cent of respondents pointing to this. But there are concerns around how well organisations are reporting accidents, with 27 per cent

failing to make use of key performance indicators (KPIs) to measure these. Other priorities are systems (83%) and fire prevention and management (82%), while 56 per cent are targeting cultural change.

There are challenges, too, which loom for organisations and could impact health and safety performance. These include skills shortages (highlighted by 47%), budget cuts (41%) and the pressure to improve productivity (39%). Inflation is also still a worry for more than a third (36%).

These are ongoing issues that were also highlighted in last year's report and which combine to creating a turbulent landscape that health and safety professionals need to navigate. An emphasis on training and development and workplace culture is seen as one way of helping to navigate some of these issues.

Personal protective equipment

PPE is a vital part of the mix for health and safety professionals. The main concern here is finding the correct equipment, put forward by 46 per cent of respondents. Other issues are range (12%) and cost (11%), but it's reassuring to see concerns around availability listed by only seven per cent (down from 13% the year before).

The survey also explores two big topics in the area of PPE: women's equipment and sustainability. There are some mixed messages with both of these; while 82 per cent of respondents think more needs to be done to ensure women have suitable equipment, only one per cent say it's important when it comes to making a purchase.

Similarly, 78 per cent say they would be prepared to pay extra for a more sustainable product, yet only two per cent cite this as an important factor when buying items. Cost is clearly still a major factor here, even if organisations would like to improve their practices.

There are also other issues around PPE. Sub-standard or counterfeit PPE is a real concern for more than a third (37%) of respondents, while 31 per cent find it a struggle to find suppliers with the right stock and services. Knowing where to source quality parts is also a growing concern (up from 26% to 28%). Building relationships with a trusted partner can help here, taking the hassle away from buying teams and providing quality items that can be relied on.

IN ASSOCIATION WITH



Survey respondents: Industries



31%
Facilities & Intralogistics

Education, Facilities Management, Government, Health & Social Care, Logistics/Distribution, Public Sector, Retail/Wholesale, Sports Grounds and Events



16%
Discrete

Automotive, Defence, Electronics OEM / Contract Manufacturing, Industrial Machinery & Equipment, Metals / Fabricated Products, Transportation



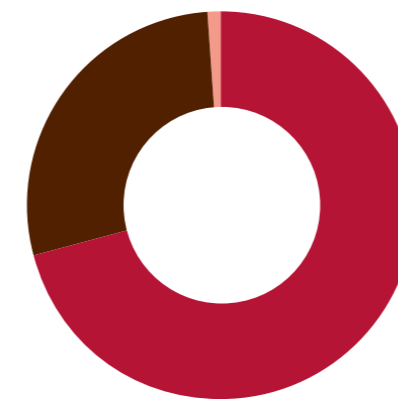
9%
Process

Chemicals & Petroleum, Food & Bev, Plastics, Pharmaceuticals, Paper & Packaging



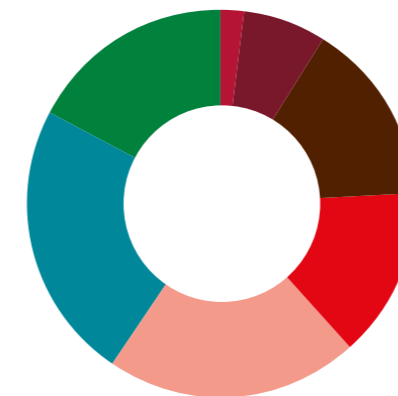
8%
Energy

Energy, Oil & Gas, Telecommunications, Utilities



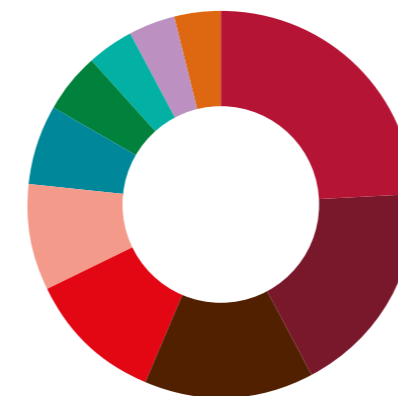
How do you identify?

71% ■ Male
28% ■ Female
1% ■ Prefer not to say



Age

2% ■ 18-24 years
7% ■ 25-32 years
15% ■ 33-39 years
14% ■ 40-46 years
21% ■ 47-53 years
23% ■ 54-60 years
17% ■ 61+ years



Job role

19% ■ Health & Safety Manager
14% ■ Environment Health & Safety Manager
11% ■ Health & Safety Advisor
9% ■ Health & Safety Officer
7% ■ Health & Safety Consultant
5% ■ Health & Safety Co-Ordinator
4% ■ Environment, Health & Safety Specialist
3% ■ Quality & Environment Manager
3% ■ Safety Officer
3% ■ Senior Health & Safety Advisor



EHS teams play a fundamentally important role within the workplace, ensuring consistency of approach, embedding standards.”

Dr Karen McDonnell

Occupational Health and Safety Policy adviser at the Royal Society for the Prevention of Accidents (RoSPA)

MANAGING EHS CAPABILITIES: COMPETENCE, CULTURE AND CONFIDENCE

Most businesses are confident in the capabilities of their EHS teams and the wider health and safety culture. But given the high levels of workplace accidents, could this be misplaced?

Most organisations believe they have relatively high levels of competence within their EHS teams. Four out of five (80%) respondents rate the systems, reporting, leadership and governance for EHS as either high or extremely high, while 89 per cent rank their ability to protect end-users in the same way. It’s a similar story with employees, where 88 per cent believe they have either high or extremely high levels of capability.

Yet Dr Karen McDonnell, Occupational Health and Safety Policy adviser at the Royal Society for the Prevention of Accidents (RoSPA), points out there are still plenty of workplace accidents and fatalities. Data from the HSE’s Health and Safety at Work 2023 report cites Reporting of Injuries, Diseases and Dangerous Occurrences Regulations (RIDDOR) which shows there were 135 people killed in work-related accidents in 2022-23 and estimates 500,000 suffered from work-related musculoskeletal disorders. A further 1.8 million workers suffer from work-related ill-health more generally.

“The HSE statistics continue to be staggering,” says Dr McDonnell. “There’s a question around how people are looking at their performance versus what the overall data is telling us. EHS teams play a fundamentally important role within the workplace, ensuring consistency of approach, embedding standards that bring the organisation towards compliance, then moving forward through benchmarking with others towards a reduction in work-related harm.”



Interventions on company culture need to suit the demographic of the business.”

Head of Environment, Health & Safety, Technology sector

Concerns over competence

Steven Harris, Managing Director of Integrity HSE, has concerns over the fact around one in five EHS professionals does not believe their levels of competence are high.

“Considering the moral, legal and economic argument for those factors, anything below 100 per cent is a red flag,” he says. “More organisations need to understand it is their legal responsibility to protect employees to a reasonable extent and, of course, there is the very strong economic argument that good EHS is good for the bottom line.”

There are also potential concerns when it comes to the wider business. While 84 per cent of respondents report high or extremely high levels of confidence in their organisation’s attitude to EHS, this still leaves 16 per cent who do not believe this to be the case. And the figure drops further when it comes to rating the overall safety culture, with only 76 per cent rating theirs as high or extremely high.

John Barnacle-Bowd is Vice President for Environment, Health & Safety at RS Group. He points out that culture can be hard to define and difficult to compare: “If a culture is good in one organisation, have they compared it to another and how are they defining that?” “Are

people doing the right thing? Are they reporting accidents? The companies that are more compliant have probably got a better culture.

“Some of the large corporates have very strong safety cultures and they have been doing it for years. The quarter that haven’t said it’s high could well be on a journey and even just putting their head above the parapet and answering this survey, shows they want to do the right thing. That’s positive.”

Encouragingly, confidence in the overall effectiveness of EHS capabilities is rising. The proportion of people who say they are either confident or very confident in their ability to protect people from physical harm has increased from 77 per cent a year ago to 81 per cent, while the selection of correct PPE is now at 80 per cent. Only the ability to cope with disease of infection has fallen (from 76% to 69%), perhaps as a result of the fading impact of the Covid-19 pandemic.

Harris, though, warns against the risk of complacency creeping in: “This could well be smoke and mirrors. If, just before the Deepwater Horizon disaster, I was to ask BP and Transocean if they had good employee and end-user protection in place, then they would have likely said yes. There were prizes for safety given to the rig around the time of the tragedy. That incident resulted in 11 deaths and a huge oil spill.”

A growing focus on mental health

One emerging focus of attention is mental wellbeing. Three-quarters (75%) now have a focus on mental health support, although only six per cent rank this as their main priority. But only just over half (55%) of respondents say they are now confident in their capabilities around this (slightly up from 52% a year ago). While this is significantly lower than other, more traditional areas, it does perhaps reflect a growing awareness of the need for it to form part of the EHS landscape.

Dr McDonnell suggests lower levels of confidence around mental health support could mean EHS professionals are part of wider, multi-disciplinary teams, including HR.

“We all have our limits of competency,” she says. “Perhaps EHS is identifying what the issues are and working with people who are competent in those areas to help put systems in place that not only manage the risk, but help people thrive within the workplace environment.”

Interestingly, medium-sized firms – those with between 50 and 249 employees – tend to be more confident about their overall EHS capabilities than small or large businesses.

Some 85 per cent of medium-sized organisations say they are confident or very confident around this, compared to 80 per cent of small businesses and 78 per cent of larger enterprises.

This could suggest organisations struggle to retain control over EHS as they progress from medium to large players.

“If you’re a growing organisation, you need to make sure culture is embedded as you become bigger,” says Plummer. “How do you onboard people? How often does the topic of health and safety come up? Are there regular reviews of KPIs? That’s the way to ensure that you’ve got a level of consistency you can apply across the board to the business.”

Larger organisations can also help to change the culture in smaller firms by making health and safety a core component of any procurement decisions, believes Dr McDonnell.

“EHS professionals need to get better at explaining the benefits of ‘good health and safety’ to their supply chain, as this adds value for both parties,” she says.

“One way of securing the future for any organisation is to have a healthy and happy supply chain that ensures you have everything you need from them at the right place and the right time to the right standard. Evolving supply chain culture brings real benefits from a sustainability perspective and will support your organisation to tackle whatever the future is going to bring.”

Confidence in business capability for managing.....



Physical harm

81%

Confident / very confident



Selection of correct PPE

80%

Confident / very confident



Disease or infection

69%

Confident / very confident



Mental wellbeing

55%

Confident / very confident

The attitude towards managing EHS within your organisation



84%

High /extremely high

The safety culture within your business



76%

High /extremely high



“

I work for quite an agile young business and they love our well-being health day and meditation sessions. But trying to book that at a construction business is just not going to work. We’ve got to look at the interventions that suit the demographic of the business.”

Head of Environment, Health & Safety, Technology Sector



BUSINESS STRATEGY AND COMPLIANCE: A QUESTION OF MATURITY

Many organisations have concerns over the maturity of their health and safety capabilities and this is reflected in gaps around how they measure compliance. What are the risks and how are professionals addressing them?

Only 39 per cent of survey respondents feel their business is operating at a high maturity level in terms of its EHS credentials. More than half (54%) instead suggest they are performing at a medium level and seven per cent rate their maturity as currently low.

Rachel Butler, Head of Health, Safety and Risk at office space firm Bruntwood, says this is worrying, given the high levels of legislation existing in the UK in this area: “We have probably the world’s best health and safety legislation, so to have only 39 per cent of organisations rating their business as mature is a concern.

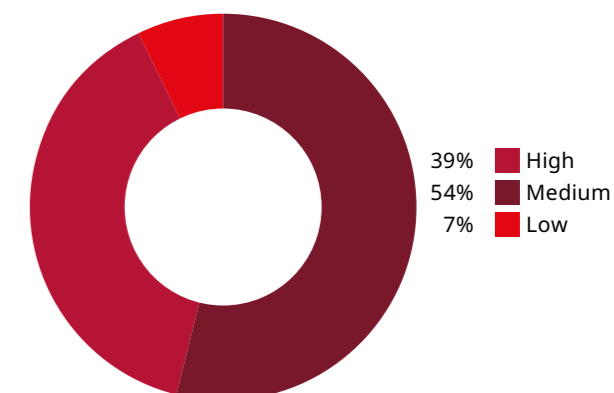
“But then, on the other hand, if we have some immature health and safety management plans, which may have only been running for two to three years, which could be seen as quite refreshing. It could be organisations are saying they want to do things differently and are implementing new environmental, health and safety quality management systems.”

Barnacle-Bowd believes the introduction of environment factors (the E in EHS) could be behind a reluctance for people to label their

business as having a high level of maturity.

“More people now are pushing on the sustainability piece and the environment element could be new to some organisations,” he says. “It could be a health and safety team has been given environment to look after and, while they may have had some training, they may not have the high level of skill needed in big corporate organisations.”

Level of maturity in your business for managing Environment, Health & Safety



“

One of the hardest things in a factory is to recognise a near miss or getting someone to report it.”

Maintenance Manager,
Manufacturing

As organisations grow, so must competency

When it comes to particular EHS strategies, there are some obvious areas of focus. The average business has implemented a total of five strategies, with the most common revolving around accident prevention (86%), systems (83%) and fire prevention and management (82%). More than half (56%) are targeting cultural change.

“These are largely as expected, says Butler, “particularly the focus on accident prevention, which is the bread-and-butter of any EHS professional. Changes in legislation and the Building Safety Act mean fire prevention is going to be on everybody’s agenda.”

One in 10 respondents are now making fire prevention management their main focus, although the highest priority is accident prevention, chosen by 38 per cent of participants, followed by systems (17%) and cultural change (16%).

The survey also suggests larger companies are more likely than smaller firms to have strategies around governance (76% compared to 59%) and mental health (83% compared to 51%). This is perhaps to be expected, as larger organisations will have bigger teams and more resources.

“The bigger the organisation, the more competent a health and safety person needs to be and with that competence comes a history of working with mental health and governance,” suggests Barnacle-Bowd. “They’re effectively buying in that competency.”

The focus for EHS professionals takes in different elements. Electrical safety is managed by 87 per cent of respondents, with other legal requirements standing at 73 per cent. Seven in 10 (70%) manage gas and heating safety, while 67 per cent look after water safety. Where these are not part of the remit for EHS professionals, though, it doesn’t mean they aren’t being managed.

“In some organisations these responsibilities may not fall under health and safety, but under a facilities or a building management team and that could be internal or external,” points out Barnacle-Bowd.



As a process is developed, embed it. People shouldn’t think Health & Safety is a separate task, it’s just part of what you do.”

**Operations Manager,
Manufacturing**



Changes in legislation and the Building Safety Act mean fire prevention is going to be on everybody’s agenda.”

Rachel Butler
Head of Health, Safety and Risk, Bruntwood

KPIs in place to measure compliance & performance



What gets measured, gets done

Organisations are making at least some use of key performance indicators (KPIs) to stay on top of how well they comply with EHS requirements. But there is cause for concern here. While 73 per cent use KPIs to measure accident rates, this suggests more than a quarter (27%) of businesses do not.

“This is shocking,” says Barnacle-Bowd. “Why wouldn’t you be measuring your accident performance? If you’re not looking at KPIs related to safety, it’s not on your agenda. It’s naive of organisations not to have any safety metrics in their KPIs. Is it because they’ve got complacent?”

Other metrics used by at least some organisations include near-miss rates (67%), observations (59%), lost time accident rates and total incident frequency rates (both 56%).

The survey also identified a number of potential risks to health and safety in the coming 12 months, although concerns have dropped in comparison to 2023. While skills shortages are recognised by 47 per cent as a significant issue, this is down from 51 per cent last year. Similarly, concerns about budget cuts have reduced (from 45% to 41%), as have worries about the pressure to improve productivity (43% to 39%), and there has been a big drop in concerns around inflation (52% to 36%).

Organisations, though, are thinking about how they can improve employee compliance with health and safety. Training and development is seen as having a high or very high impact by 68 per cent (61% last year). Improving workplace culture is also seen as important, and has remained broadly steady at 65 per cent (66% last year).

But some issues remain. Half (50%) believe limitations to skills or expertise within the health and safety function is impacting compliance, (up from 45% a year ago), and 44 per cent think workforce churn is having a significant impact (up from 41%).

This is filtering through into tangible actions planned for the next 12 months. More than a quarter (27%) think improving policies and procedures would help enhance their health and safety compliance, (20% the year before). And one in four (25%) believe the same about both staff retention and new technology, (up from 15% and 23% respectively).

Dr McDonnell believes a greater focus on both policy and procedures and also staff development is a positive step.

“There’s a whole piece here around bringing people together to make the required improvements and making sure this is something that is done with the business, as opposed to being done to the business,” she says. “People need to have the capacity to do that effectively and then the capability to ensure they bring the best out from any engagement process, so they can evolve policies and procedures.”



If you’re not looking at KPIs related to safety, it’s not on your agenda. It’s naive of organisations not to have any safety metrics in their KPIs.”

John Barnacle-Bowd
Vice President for Environment, Health & Safety, RS Group



The British Safety Industry Federation is very clear on standards for personal protective equipment.”

Dr Karen McDonnell

Occupational Health and Safety Policy adviser at the Royal Society for the Prevention of Accidents (RoSPA)

PERSONAL PROTECTIVE EQUIPMENT: EVOLVING EVERYONE'S APPROACH

The procurement, application and disposal of personal protective equipment is under increasing scrutiny across every industry. It's time for a more considered approach factoring in quality, sustainability and properly-fitting equipment for women.

Personal protective equipment (PPE) is a vital part of the mix for many organisations, particularly those working in manufacturing or industrial environments.

“PPE is the last line of defence from a safety perspective so it's critical to find the right product for the right application,” says Plummer.

Unsurprisingly, the majority of survey respondents agree, with 46 per cent highlighting the most important factor when selecting PPE is finding the correct product.

But other elements are also important; 12 per cent highlight the need for a good range and 11 per cent cite cost (14% last year). Meanwhile, seven per cent state availability is the most important factor (13% last year), perhaps reflecting the easing of the post-pandemic supply shortages.

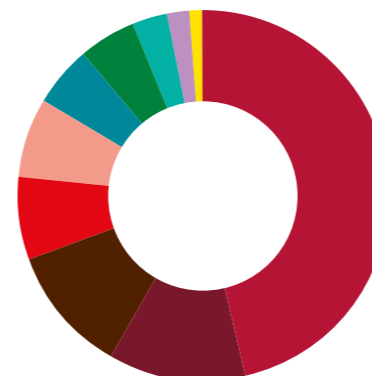
“It's important clients provide as much information as possible to suppliers to enable an informed decision,” Plummer adds. “We have a technical sales team that allows us to help specify products and can even walk through the premises to spot ill-fitting or incorrectly used PPE, so it's important we're able to talk to customers to understand their requirements in order to provide support.”

There can be challenges around sourcing PPE, however. The biggest, according to the survey, is finding suppliers that have the stock and services required, which has risen to 31 per cent (23% last year). Others include sourcing quality and trustworthy parts at 28 per cent (26% last year), keeping up to speed with new products and technology at 23 per cent (also 23% last year) and knowing where to go to get the best price, which came in at 23 per cent (20% last year).

There are also concerns over the ever-present risk of counterfeit or sub-standard products, which more than a third (37%) see as an issue. Having a solid procurement process is vital here, says Dr McDonnell.

“The British Safety Industry Federation is very clear on standards for personal protective equipment,” she explains. “Getting PPE procurement right first time is fundamentally important, and businesses should take advantage of the available support and guidance from recognised suppliers. They must ensure that the PPE they are issuing has been correctly tested and certified to the appropriate standard. Failing to do so puts workers lives at risk.”

Importance when sourcing PPE



46% Find correct product for application
12% Range
11% Product cost
7% Availability
7% Product fit
5% Product lifespan

5% Technical support
3% Product training
2% Sustainable materials
1% Ethical sourcing
1% Women's PPE
0% Renewable considerations

Inclusive PPE: Is there enough education?

One area gathering increasing levels of attention is women's PPE, with safety footwear (62%), workwear (59%) and high-visibility clothing (45%) seen as products where a better approach is needed. Yet while 82 per cent of respondents (and 85% of those aged 18-31) believe more needs to be done around ensuring women have suitable equipment, only one per cent rank this as an important factor when buying items. This is despite the fact that a quarter (25%) say 40 per cent or more of those in their workforce who need PPE are women.

This is no surprise to Katherine Evans, founder of the women's support network, Bold as Brass. "Businesses say this is an important issue but then buy the cheapest items they can," she says. "They don't see the money they put aside for PPE is based on what it costs to fit a man up. And they definitely don't see telling a woman she has to have something that fits a man because of a £4 difference is effectively telling a woman she's not worth that."

Dr McDonnell says with more women entering construction in general, it's in the interests of employers to ensure they are suitably protected. "Businesses need to get better at looking at the demographic of people who are working for them and ensuring they have the right level of protection," she explains. "Health and safety legislation is there to protect all people at work, so the sector needs to make more evident what's available and then encourage people to purchase accordingly. If it's not provided, then they're not protected."

'More needs to be done to ensure that PPE is suitable for women in terms of better fit, sizes and suitability.' Do you agree?

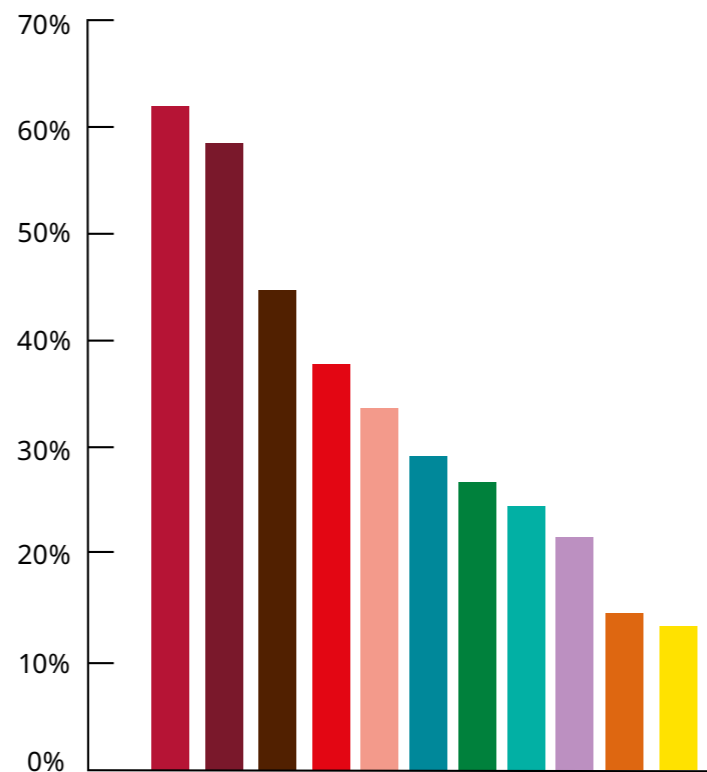


82%
strongly agree / agree

Plummer points out many manufacturers are making PPE for women and agrees that the issue is a case of educating buyers on product availability. "Let's not think we're in a good position just because we're offering some smaller-size variants," he adds. "From a manufacturing standpoint, the range of products is incredible. Most of our mainstream partners are taking this seriously in terms of doing market research and developing products that are ultimately fit for purpose and these products are available through RS."

Product categories needed to make more suitable for women

- 62% Safety Footwear
- 59% Workwear
- 45% Hi-Vis Clothing
- 37% Hand Protection
- 33% Eye & Face Protection
- 29% Respiratory Protection
- 26% Head Protection
- 24% Disposable Workwear
- 21% Fall Protection
- 14% Arm & Knee Protection
- 13% Ear Protection



Sustainability versus affordability

Sustainability is another area where there is a gap between the rhetoric and reality. Here, 78 per cent of respondents say they would be prepared to pay extra for a more sustainable product, yet only two per cent cite sustainability as an important factor when making a purchase. With cost the third most important element, this perhaps suggests when it comes to the final decision, buyers typically revert to the cheapest option.

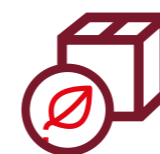
There is a clear need for education here, around both the misconception around the initial cost of sustainable items and the overall cost of ownership. "A couple of years ago you could see a notable price difference between the base product and the sustainable alternative," says Plummer.

"But there's not this significant price differential between the two options now. There are many examples where the sustainable option has cost-in-use benefits, so there's even an argument to say sustainable options are actually more cost-effective than the alternative. It's important that the conversation starts to steer away from the price point."

Organisations are also starting to take steps to recycle PPE. The survey found that 41 per cent currently manage this in-house, while 29 per cent outsource this to a third party. RS has recently partnered with textiles recycler, Avena, helping to provide a recycling option for customers.

"Partnering is a strong way to make some inroads into this important topic," explains Plummer. "But credibility also comes in here because it's really important these products don't end up in landfill and we're able to turn those items into something that could be reused, possibly in different industries."

Would you pay a premium for sustainable products?



Yes 78%
No 22%



I think there are some companies out there who are applying the one-size-fits-all mantra – just turn up the cuffs and it'll fit."

**Health & Safety Consultant,
Oil & Gas**



HEALTH AND SAFETY ACROSS THE INDUSTRIES

Respondents to the RS Health & Safety survey were drawn from a wide range of sectors. Here, we take a closer look at four broad categories of industries, examining and comparing their performance, confidence and concerns when it comes to core health and safety issues.

Facilities and intralogistics

The facilities and intralogistics category includes industries such as education, facilities management, government, health and social care, and retail/wholesale. Only 21 per cent of key stakeholders here come from engineering, compared to 38 per cent overall.

The organisations in this category tend to have fewer EHS strategies implemented with less consistency when compared to other sectors (80% against 85% for accident prevention and 66% compared to 70% for physical incident management).

But the sector compares better when it comes to having a strategy around governance, with 74 per cent of respondents saying this is in place, against an overall score of 68 per cent.

These businesses are also consistently less likely to have KPIs in place compared to other sectors – only 71 per cent record all accidents and only 50 per cent do so around total incident frequency rate – which suggests a relatively low level of EHS maturity.

Understandably, in a category encompassing a wide range of public sector organisations, inflation is a major concern, with 41 per cent identifying this as an issue. Almost half (49%) are worried about budget cuts, while 23 per cent identify cost as a challenge when buying PPE.

This may explain why those working in facilities and intralogistics are more concerned about the threat of counterfeit or sub-standard personal protective equipment, with 42 per cent stating this is an issue compared to an average of 37 per cent overall.

Staff retention is seen as the initiative which would most improve health and safety compliance over the next year, with 30 per cent putting this as their first choice.

Facilities and intralogistics in focus: Health and social care

This sector reports lower levels of confidence in systems, reporting, leadership and governance processes (73% compared to 80% overall) and protecting employees (84% against 88%), continuing the trend seen in last year's report.

But it is more certain in its capabilities around disease and infection (82% compared to 69%) and there has been a significant increase in confidence in mental wellbeing (70% compared to 55%).

In line with the broader category, staff retention is seen as the biggest challenge in terms of improving health and safety compliance (39%). The sector also reports higher levels of impact from workforce churn (55% compared to 43%) and workplace culture (72% compared to 64%).

It also has the highest proportion of women needing PPE, with 30 per cent of organisations reporting at least 60 per cent of those who need it. 'Overall, counterfeit or sub-standard PPE is also an issue for 41 per cent, compared to 37 per cent overall.

Energy, utilities, oil and gas, and telecoms

Encompassing key industrial facilities outside the manufacturing sector, this category includes everything from water and wastewater plants to power generation and power distribution. Key stakeholders in this space tend to come from operations (63% compared to 33% overall) and engineering backgrounds (58% against 33%).

Those working in this space demonstrate higher levels of confidence in their health and safety capabilities compared to the overall average. This is perhaps to be expected, due to the sector's long history of managing increased risk due to the nature of the work required.

Some 88 per cent rank the systems, reporting, leadership and governance processes in their organisation as high or extremely high, against a wider score across all industries of 80 per cent. And 82 per cent rate their safety culture in the same way, compared to 76 per cent, making it the strongest performing sector in this category. This could also reflect the size of organisation; 47 per cent have more than 1,000 employees, compared to 31 per cent overall.

The sector is also more confident than others in different areas. Half (50%) believe their business has high levels of maturity around managing EHS, against a wider average of 39 per cent and 64 per cent are confident they have the capabilities required to cope with mental wellbeing, making it the highest scoring sector in this area.

Interestingly, businesses in this category are also more likely to have a mental health strategy in place, showing a correlation between improved focus in this area and more confidence in organisational capabilities.

This sector also ranks highest in its belief in its ability to select the correct PPE and protect staff from physical harm. Yet there is also a contradiction here; this category scores lowest in terms of confidence in its ability to protect employees, with 15 per cent rating this average at best.

It is also most likely to feel employee compliance is being held back by limitations to skills or expertise in health and safety and to flag workplace culture as having the potential to impact on compliance. This suggests there may be a degree of over-confidence creeping in, when there are some potentially serious issues still to address.

When it comes to key performance indicators (KPIs), organisations in this space are more likely than others to measure all accident rates, lost time accident rates, total incident frequency rates and observations (behaviour-based safety). In all, 54 per cent state accident priority is their highest priority strategy, compared to a norm of 38 per cent.

This sector is also keenly aware of the importance of issuing women with correct PPE; 74 per cent strongly agree more needs to be done in this area.

Process manufacturing

Those working in the process manufacturing space are most confident in their capabilities around systems, reporting, leadership and governance processes, with 88 per cent reporting high levels.

They also come out on top around being able to protect both employees and end-users, with 93 per cent in both areas stating they have high levels of confidence. They are also most likely to have EHS strategies in place, consistently outscoring those from other sectors. Accident prevention is the highest priority strategy, with 51 per cent saying this, against an average of 38 per cent across the other sectors.

It also reports a much higher rate around the use of KPIs: 86 per cent record near-misses compared to 67 per cent overall and 81 per cent record all accidents compared to 73 per cent. And it is the sector with the highest confidence in its capabilities around protection against both disease and infection and physical harm.

It does, however, report relatively low levels of confidence when it comes to mental health, with only 45 per cent saying they felt confident around their provisions in this area, compared to an average of 55 per cent.

Perhaps because of this, the sector is least likely to claim it has a high level of maturity (only 27% feel this way compared to an average of 39%). This reluctance to put itself forward as a mature sector, despite strong performance in most areas, suggests a well-embedded culture of continuous improvement.

Finding suppliers with stock is a challenge for this sector, with 42 per cent stating this is an issue against 31 per cent overall. Finding alternatives for obsolete parts is also a headache, cited by 29 per cent against an average of 16 per cent. Pressure to increase productivity is seen as a risk, put forward by 50 per cent compared to an average of 39 per cent.

The main stakeholders here came more from operations (76%), the board (58%) and engineering (50%) backgrounds than other sectors (where the corresponding overall figures were 55%, 46% and 38% respectively).





Process manufacturing in focus: Food and beverage

Those working in the food and beverage arena are confident in their ability to manage EHS, with 90 per cent rating this high or extremely high, compared to the average of 84 per cent. It's a similar story with systems, reporting, leadership and governance processes, where 85 per cent believe this is high, against a norm of 80 per cent.

This area is also confident in its ability to protect end-users, with 95 per cent reporting high levels of capability, compared to 89 per cent overall. Some 95 per cent have strategies around accident prevention against an overall score of 86 per cent and it also performs better on fire prevention, systems and physical incident management. It is much stronger around cultural change, with 80 per cent having a strategy compared to only 56 per cent across the board.

This sector is more likely to have KPIs in place to measure compliance and performance, outperforming overall averages in almost every category. Examples here include an 85 per cent score around measuring all-accident rates, compared to a norm of 73 per cent and a near-miss rate of 85 per cent against a typical score of 67 per cent.

The biggest challenges for the next 12 months are seen as skills shortages (59% against 47% overall), inflation (41% against 36%) and the pressure to improve productivity (61% compared to 39% overall).

In terms of PPE, the top issues are finding stock (49% compared to 31%), deliveries taking too long (29% against 14%) and a lack of technical support and information (27% against 17%).

Those from an operations background tend to be key stakeholders, with 78 per cent coming from that part of the business, compared to 55 per cent overall.

Discrete manufacturing

Discrete manufacturing refers to organisations typically operating in the automotive, defence, electronics OEM/contract manufacturing, industrial machinery and transportation industries.

Those in this space are less confident about the attitude towards managing EHS in their organisation, with 77 per cent rating this highly, compared to 84 per cent overall. This is also reflected in their assessment of the overall safety culture, which 70 per cent believe to be high, compared with an average of 76 per cent. It ranks bottom in both these categories compared to the other sectors.

Specific areas of concern are around protecting people from disease and infection, where only 63 per cent are confident in their capabilities and physical harm (where 74% have a high degree of confidence). Again, the sector ranks lowest in both categories.

Improved policies and procedures is seen as the initiative that would have most impact over the next 12 months in terms of improving health and safety compliance, with 29 per cent ranking this highest.

Engineering is the top stakeholder group in discrete manufacturing (60% against an overall average of 38%) followed by procurement (29% against 21%), and 18 per cent of respondents here were aged under 31 (compared to 9% elsewhere).

THERE'S EVIDENCE OF PROGRESS, BUT IS IT ENOUGH?

On the whole, it is reassuring to see the confidence most organisations have in their abilities to manage EHS challenges and protect both end-users and employees. The focus on accident prevention is welcome, as is the greater emphasis on fire prevention and management.

But, as always, there is room for improvement and complacency mustn't start to creep into attitudes towards health and safety. This is particularly the case for the use of key performance indicators, where more needs to be done by organisations to record incidents and use this data to improve performance.

Mental health is another area warranting greater focus and it's a welcome development that more organisations are now starting to look at this. But it remains to be seen just how effective these are and it will be interesting to see if strategies and confidence levels rise – and concerns fall – over the coming years.

The survey also highlights some of the ongoing issues organisations face with personal protective equipment (PPE). It's encouraging to see the supply shortages that resulted from the COVID-19 pandemic rescind, but there remains significant work to be done to ensure everyone has access to appropriate PPE.

This is particularly relevant for women, who regularly report a lack of access to the appropriate equipment, despite women's PPE already being available in the market. The onus is on customers and suppliers to work together to ensure no one is sent into a work environment without suitable protection. Counterfeit and sub-standard products are an ever-present threat, and organisations must use reputable suppliers that can provide effective and proven quality assurance and accountability when it comes to the procurement of such items.

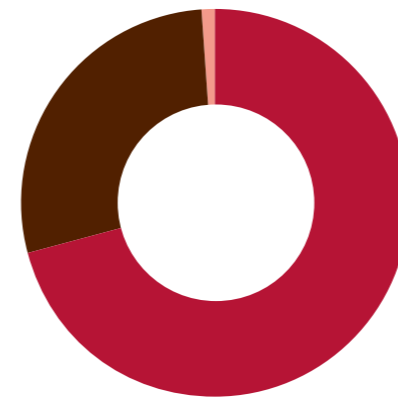
Another area starting to gain traction is sustainable and recyclable PPE and it's positive to see most people would be willing to pay a higher price for a more sustainable item. Yet the reality in practice is often different and the cost pressures under which organisations operate remain a barrier. Businesses must explore the total cost around such items, as often a more sustainable product will last longer and be better quality than a cheaper alternative.

These issues are not easy and it can be challenging for organisations to know where to turn for support. Working closely with a trusted partner can help, providing a link between buyers and suppliers.

If you would like a conversation with our experts, please visit uk.rs-online.com/ppe and complete the form.

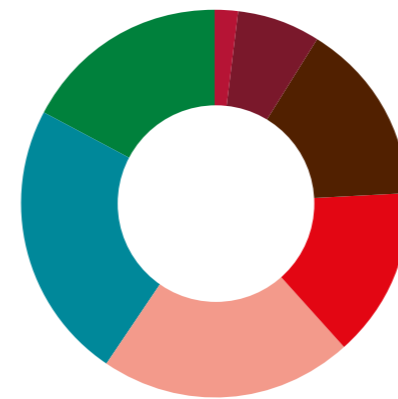
DATA

How do you identify?



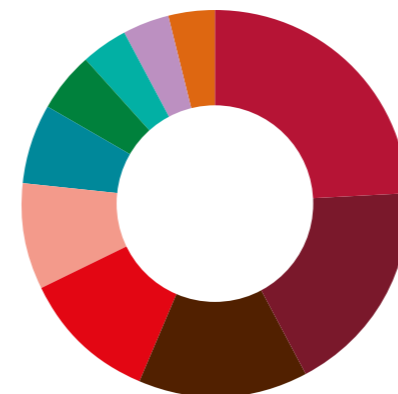
- 71% Male
- 28% Female
- 1% Prefer not to say

Age



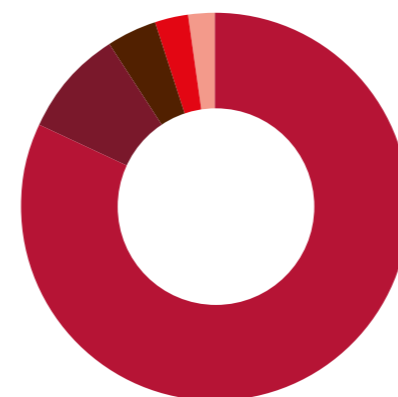
- 2% 18-24 years
- 7% 25-32 years
- 15% 33-39 years
- 14% 40-46 years
- 21% 47-53 years
- 23% 54-60 years
- 17% 61+ years

Job role

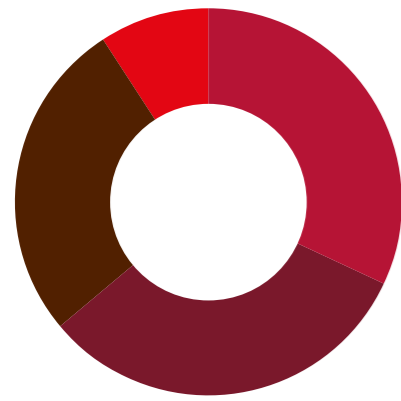


- 19% Health & Safety Manager
- 14% Environment Health & Safety Manager
- 11% Health & Safety Advisor
- 9% Health & Safety Officer
- 7% Health & Safety Consultant
- 5% Health & Safety Co-Ordinator
- 4% Environment, Health & Safety Specialist
- 3% Quality & Environment Manager
- 3% Safety Officer
- 3% Senior Health & Safety Advisor

Location

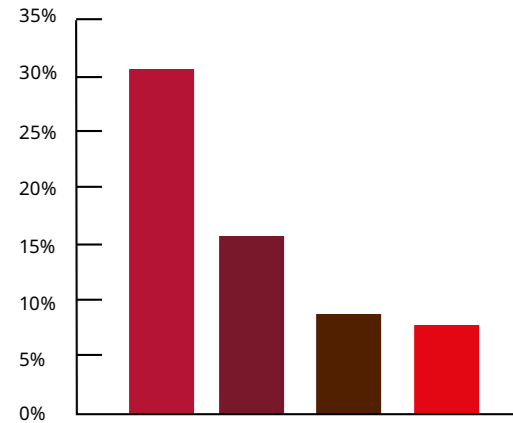


- 82% England
- 9% Scotland
- 4% Wales
- 3% Ireland
- 2% Northern Ireland



Seniority level

- 32% Mid-level management
- 32% Experienced professional
- 27% Senior-level management
- 9% Entry-level



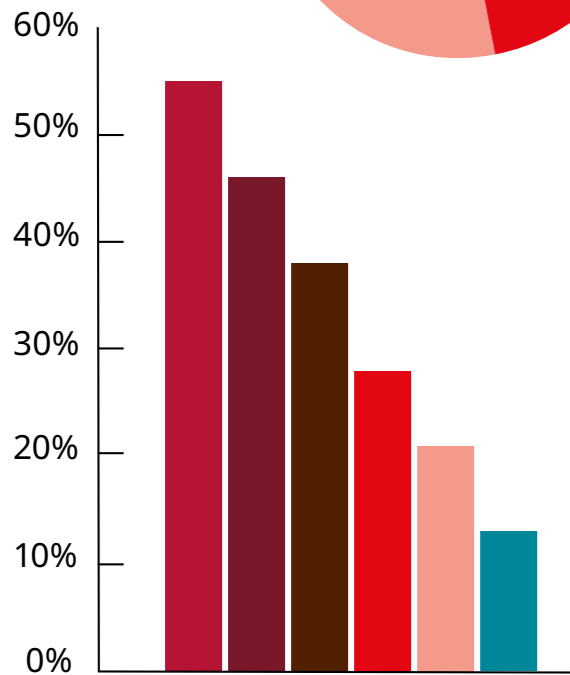
Survey respondents: Industries

- 31% **Facilities & Intralogistics**
Education, Facilities Management, Government, Health & Social Care, Logistics/Distribution, Public Sector, Retail/Wholesale, Sports Grounds and Events
- 16% **Discrete**
Automotive, Defence, Electronics OEM / Contract Manufacturing, Industrial Machinery & Equipment, Metals / Fabricated Products, Transportation
- 9% **Process**
Chemicals & Petroleum, Food & Bev, Plastics, Pharmaceuticals, Paper & Packaging
- 8% **Energy**
Energy, Oil & Gas, Telecommunications, Utilities



Number of employees in your company

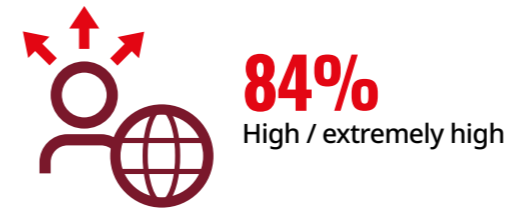
- 7% 1-10
- 11% 11-49
- 10% 50-99
- 19% 100-249
- 22% 250-999
- 21% 1,000-9,999
- 10% 10,000+



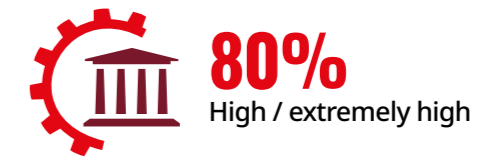
Key business stakeholders

- 55% Operations
- 46% The board
- 38% Engineering
- 28% Executive committee
- 21% Procurement
- 13% IT

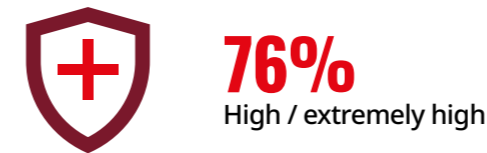
The attitude towards managing EHS within your organisation



The systems, reporting, leadership and governance for EHS in your organisation



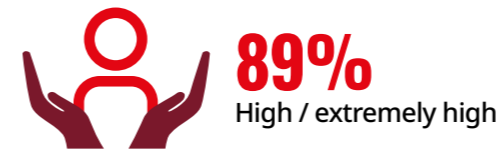
The safety culture within your business



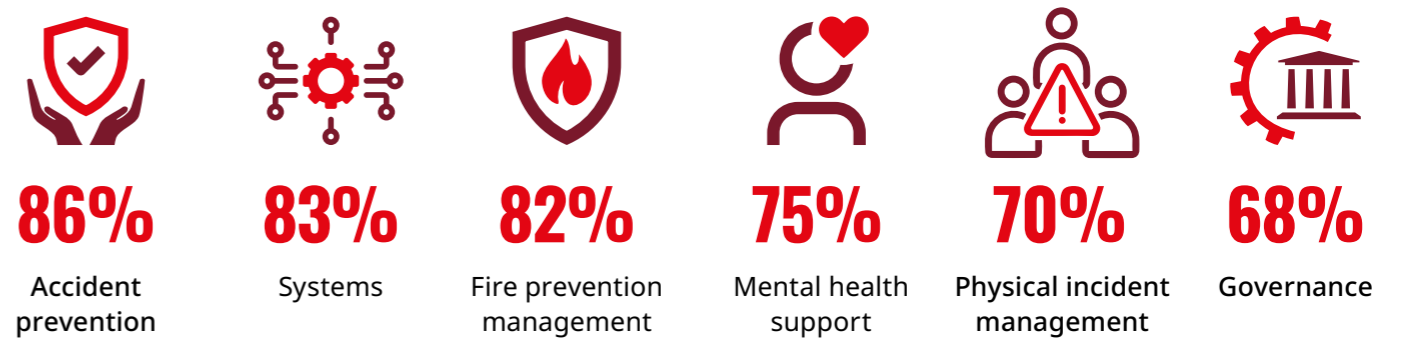
Your company's capability for protecting employees



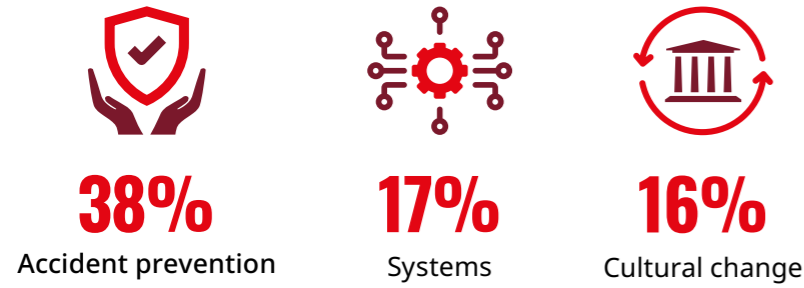
Your company's capability for protecting the end user



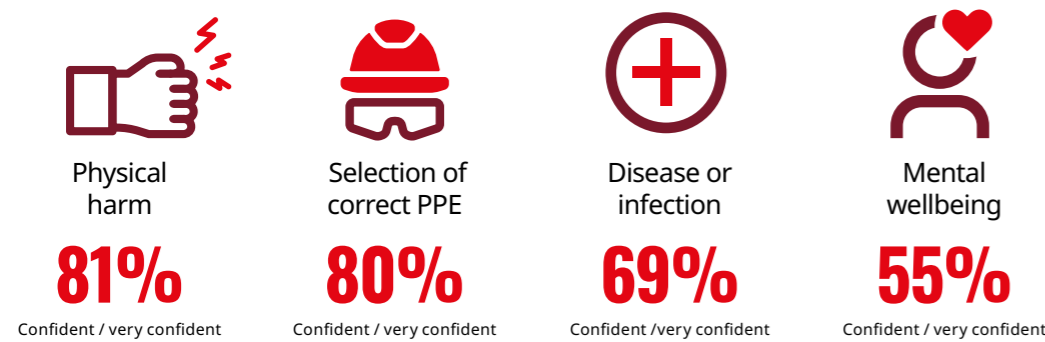
Company strategies in place for Environment, Health & Safety



Highest priority strategy for Environment, Health & Safety



Confidence in business capability for managing.....



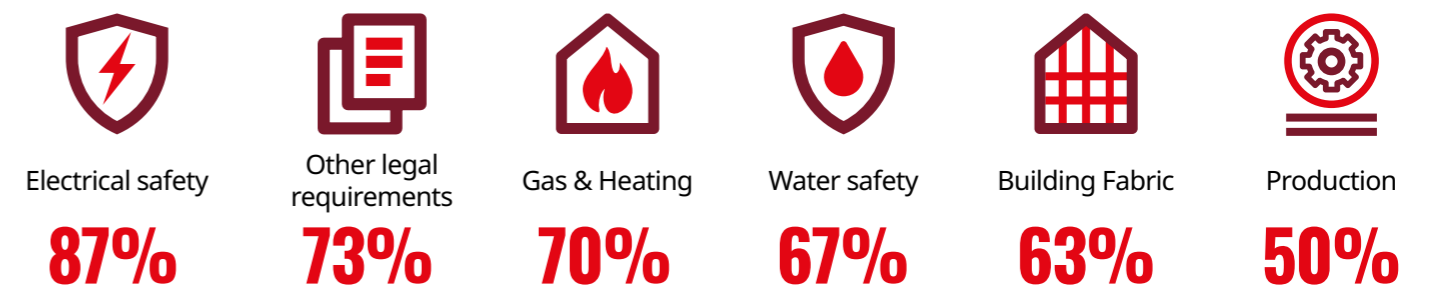
Impact on employee compliance



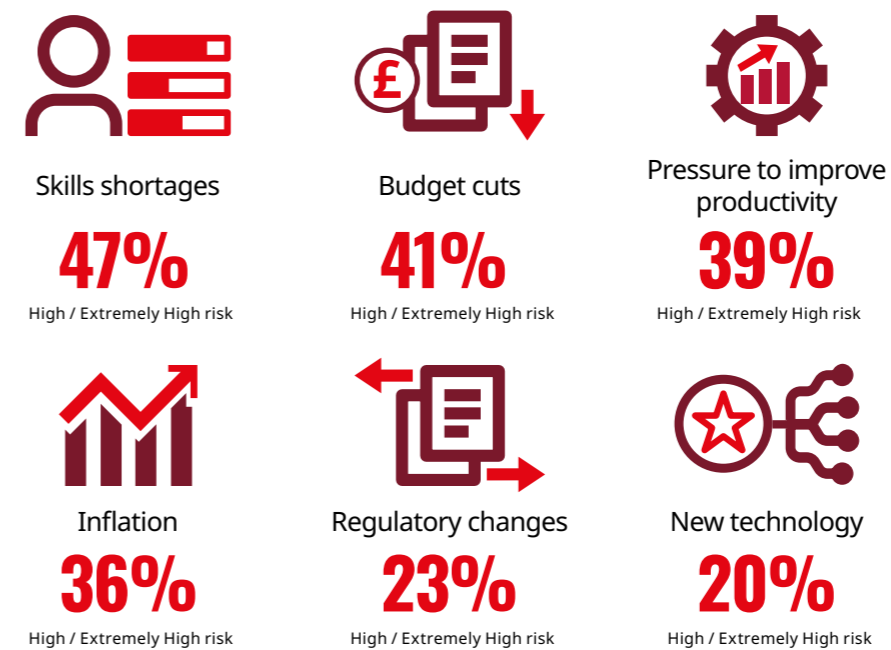
KPIs in place to measure compliance & performance



Building / facility health & safety managed



Risk posed in the next 12 months

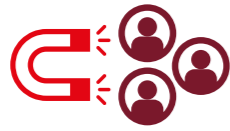


What would help improve your organisations Health & Safety in the next 12 months?



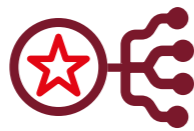
Improved policies and procedures

27%



Staff retention

25%



New technology

24%

Would you pay a premium for sustainable products?



Yes 78%

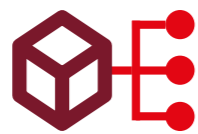
No 22%

Importance when sourcing PPE



Find correct product for application

46%



Range

12%



Product cost

11%



Availability

7%



Product fit

7%

Top challenges when buying PPE



Finding suppliers who have the stock I need / Finding suppliers who have the services / solutions I need

31%



Sourcing quality and trustworthy parts / Sourcing quality and trustworthy services / solutions

28%



Keeping up to date with new products and technology

23%



Knowing where to go to get the best price

23%

Percentage of people in your organisation requiring PPE are women



2/3 respondents state up to

40%

'More needs to be done to ensure that PPE is suitable for women in terms of better fit, sizes and suitability.' Do you agree?



82%

strongly agree / agree

Product categories needed to make more suitable for women



Safety Footwear

62%



Workwear

59%



Hi-Vis Clothing

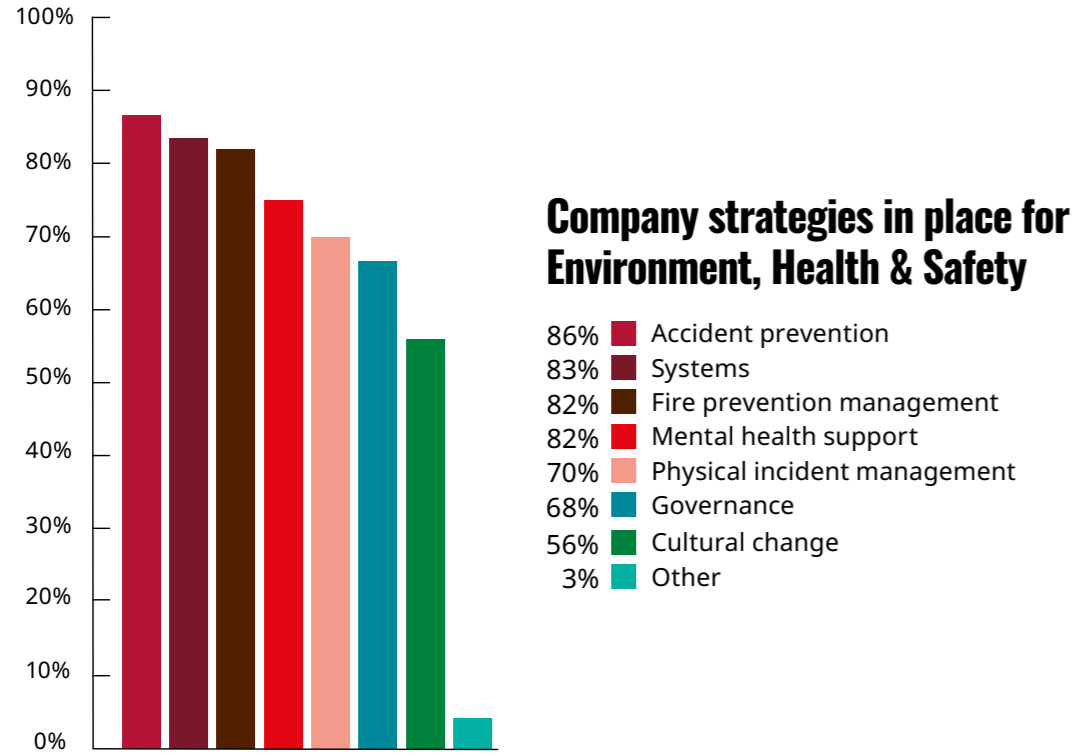
45%

How much of an issue is counterfeit / sub-standard quality PPE?

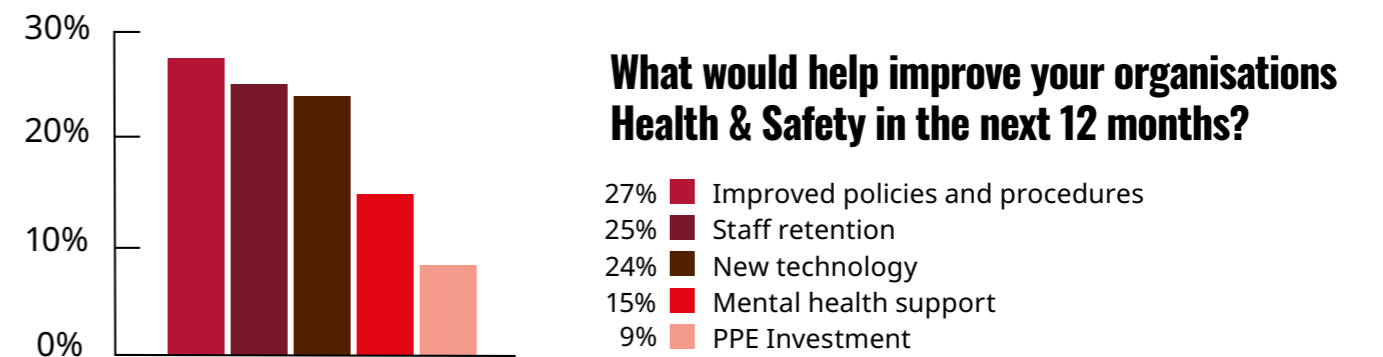
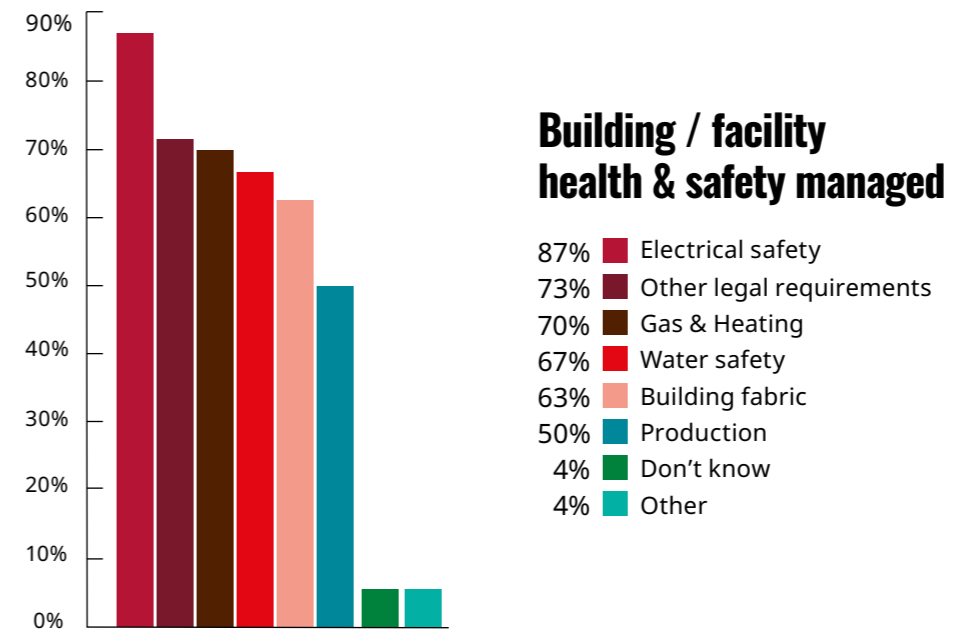
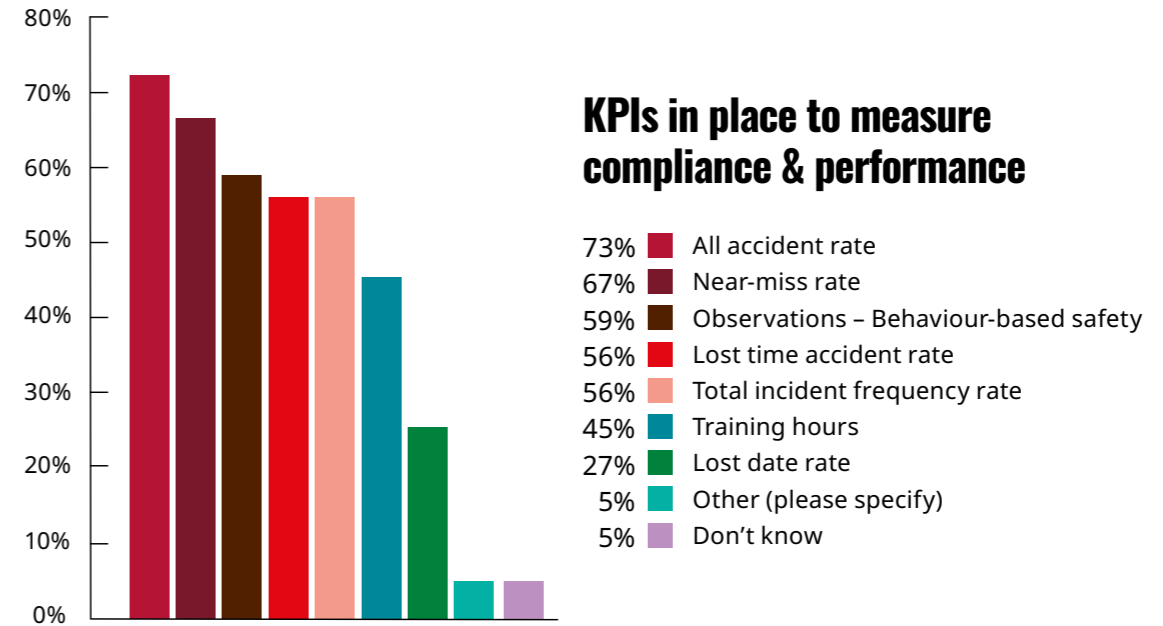
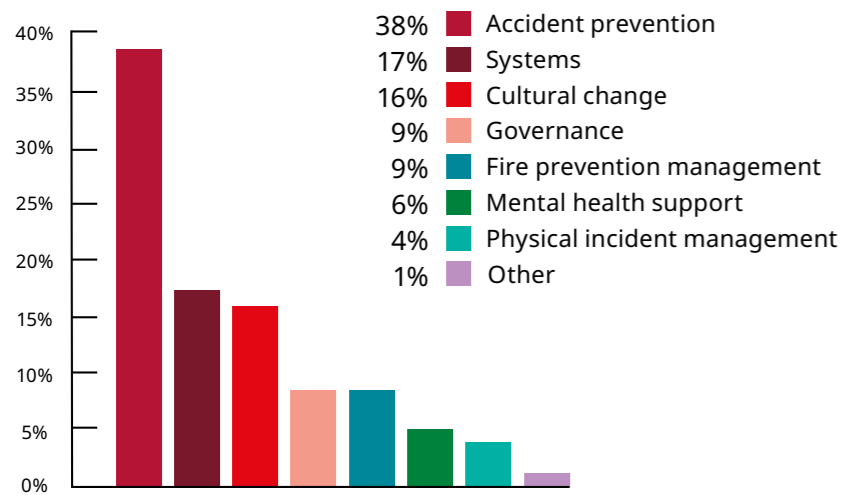


37%

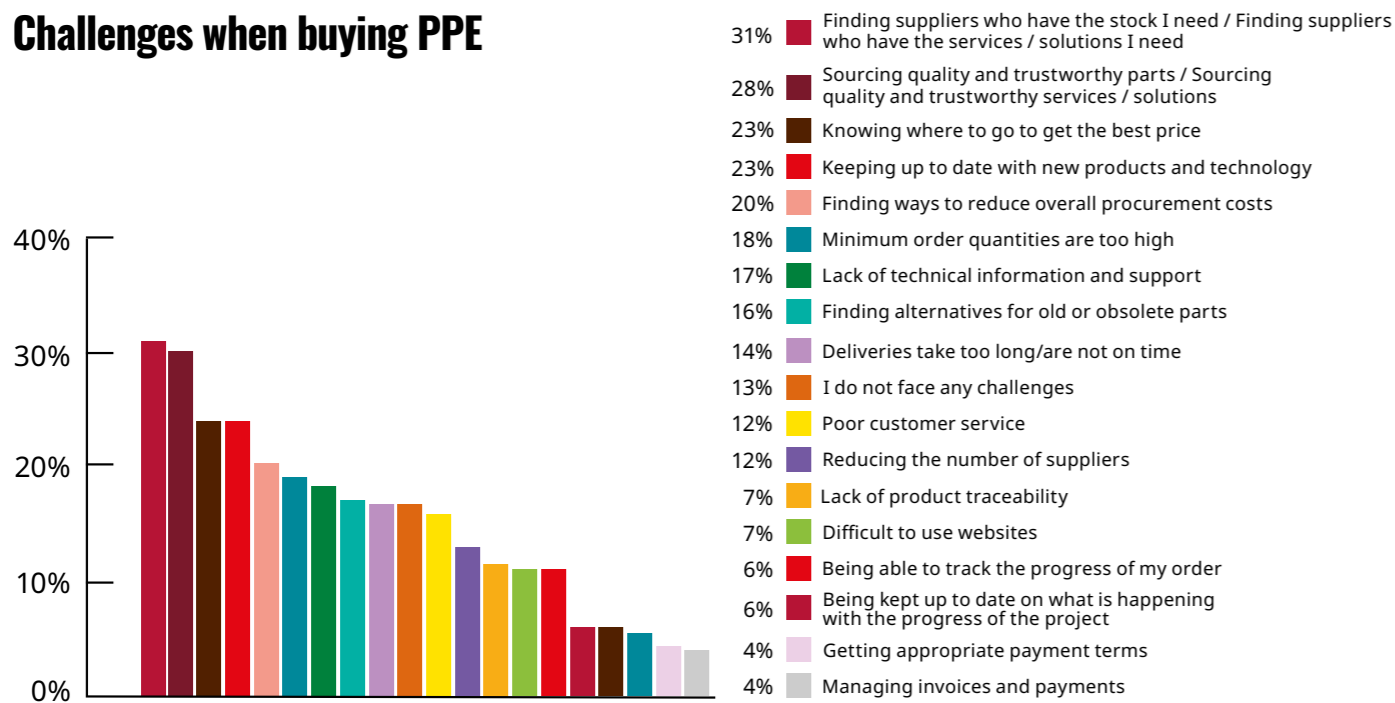
Issue / Big issue



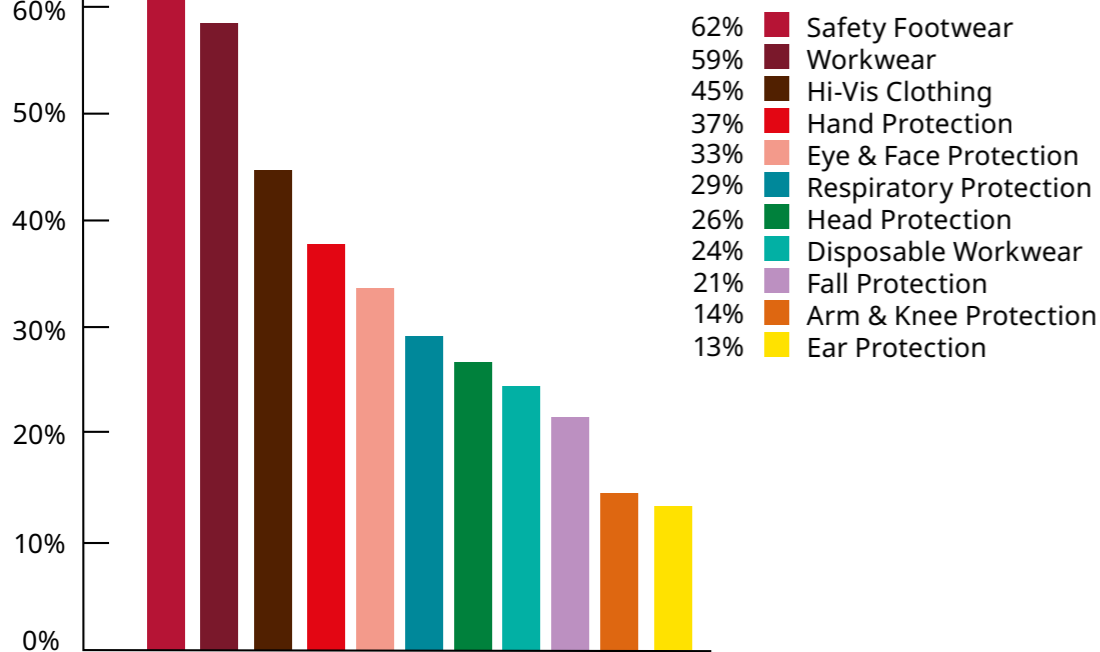
Highest priority strategy for Environment, Health & Safety



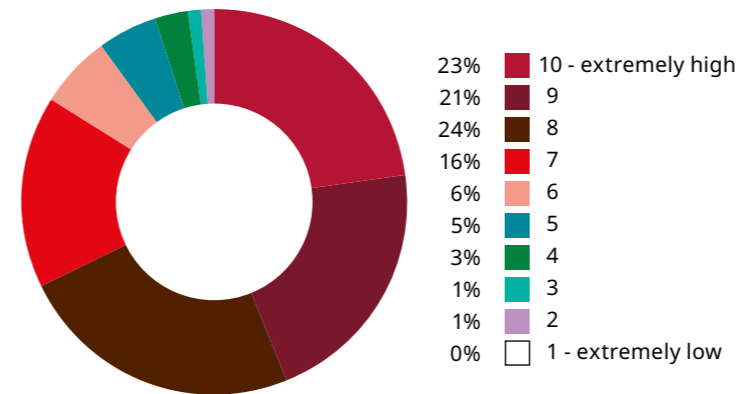
Challenges when buying PPE



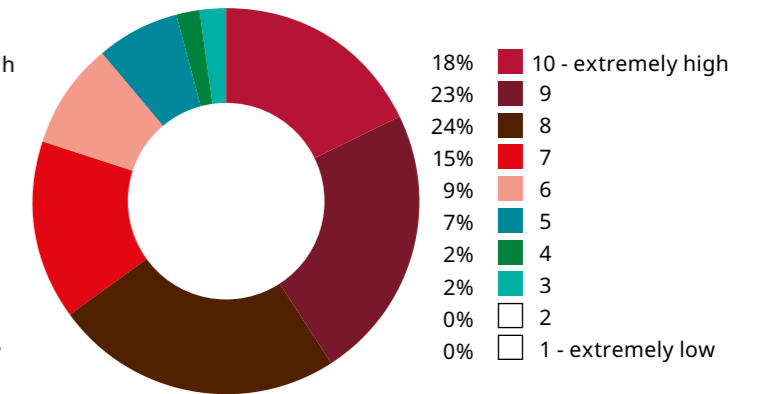
Product categories needed to make more suitable for women



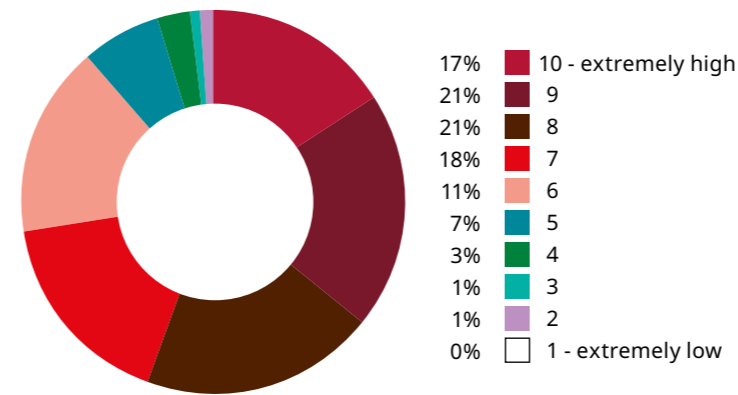
The attitude towards managing EHS within your organisation



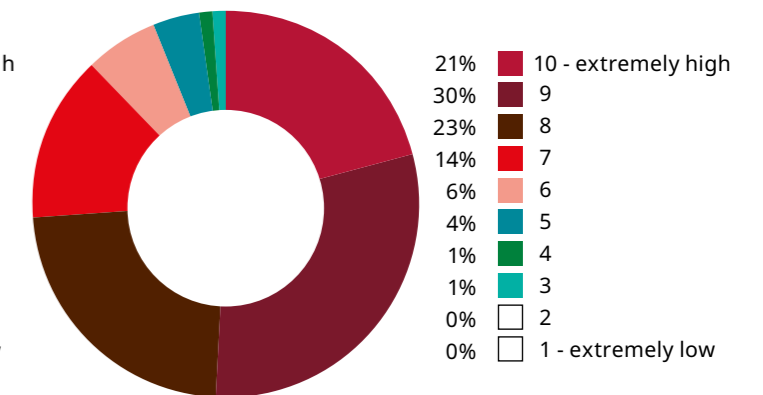
The systems, reporting, leadership and governance for EHS in your organisation



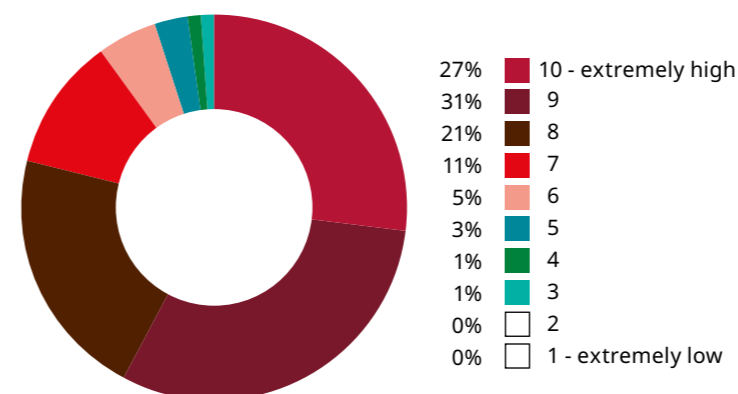
The safety culture within your business



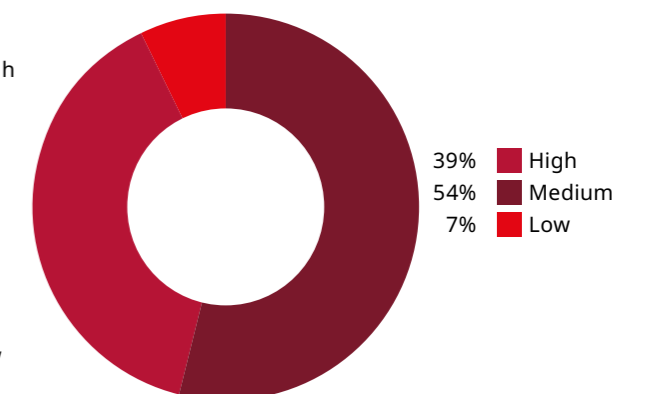
Your company's capability for protecting employees



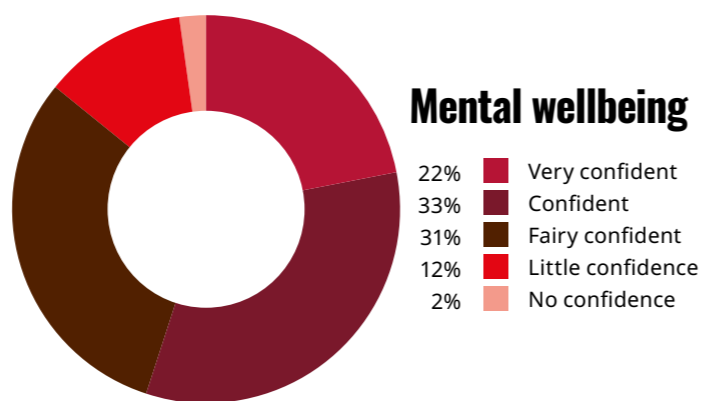
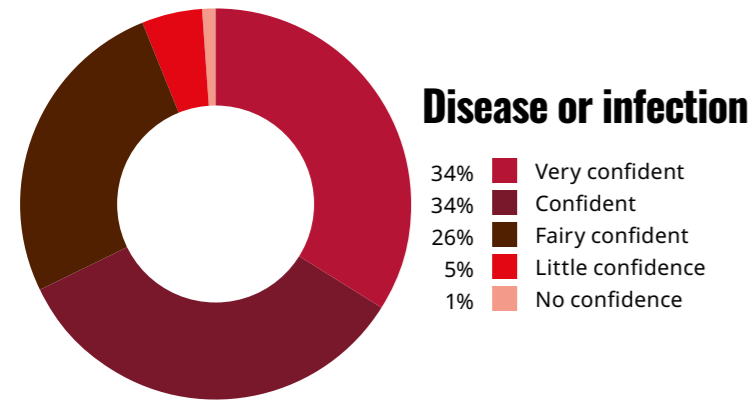
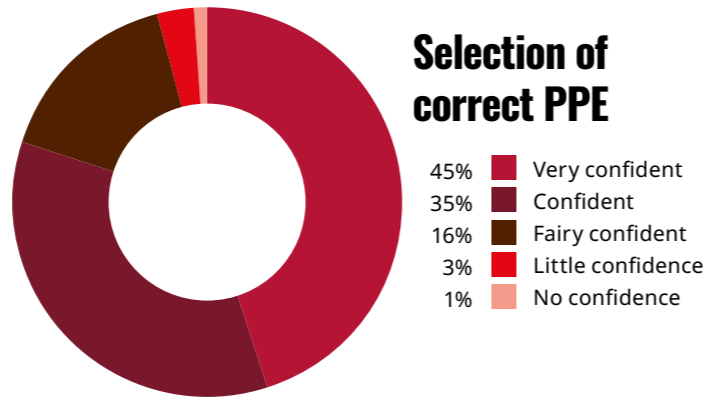
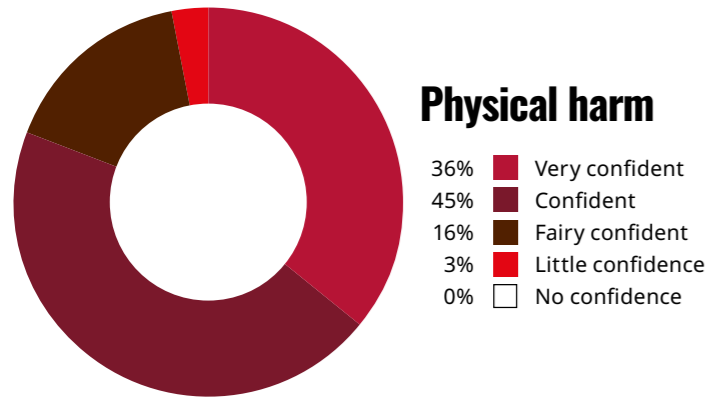
Your company's capability for protecting the end user



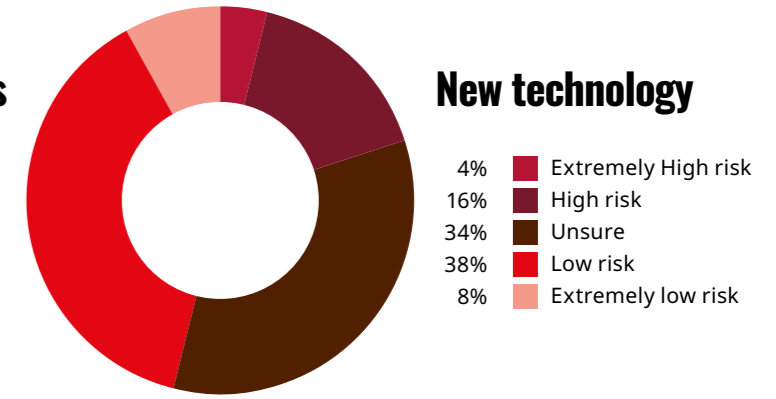
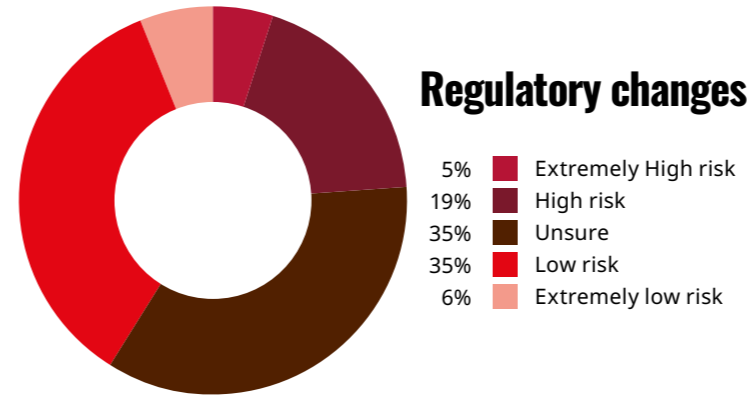
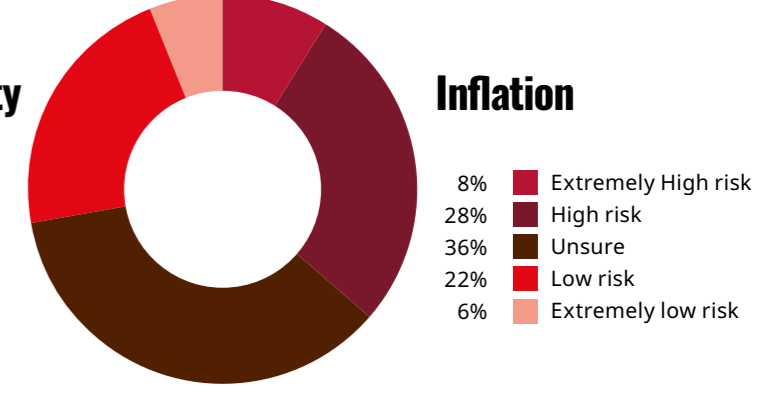
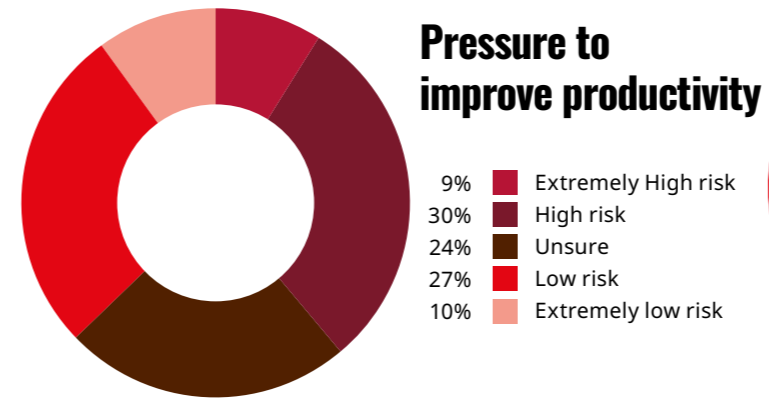
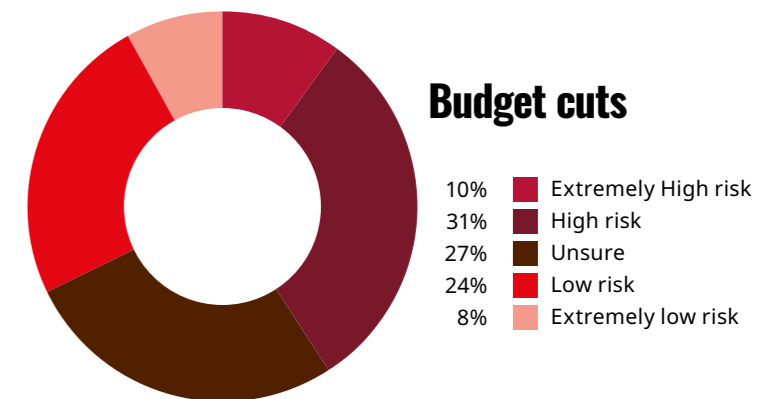
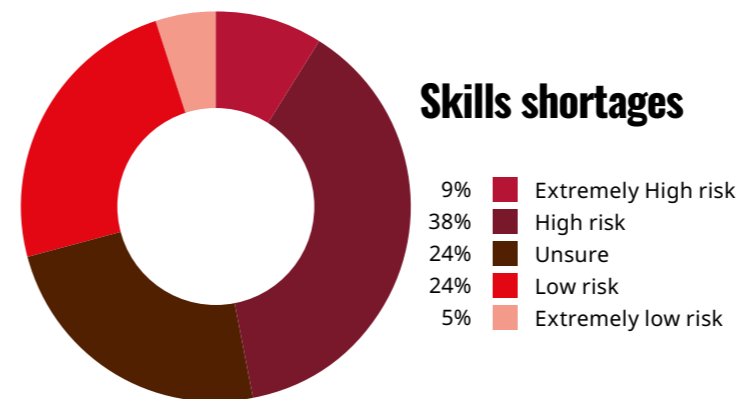
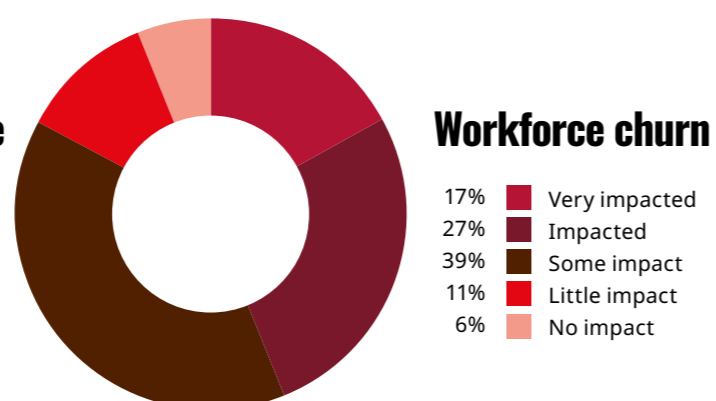
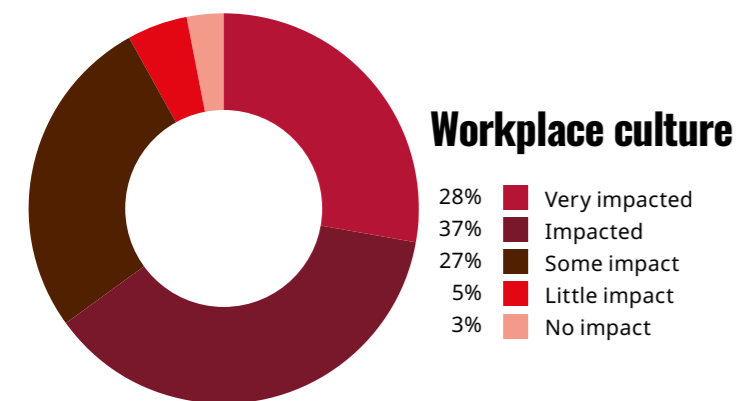
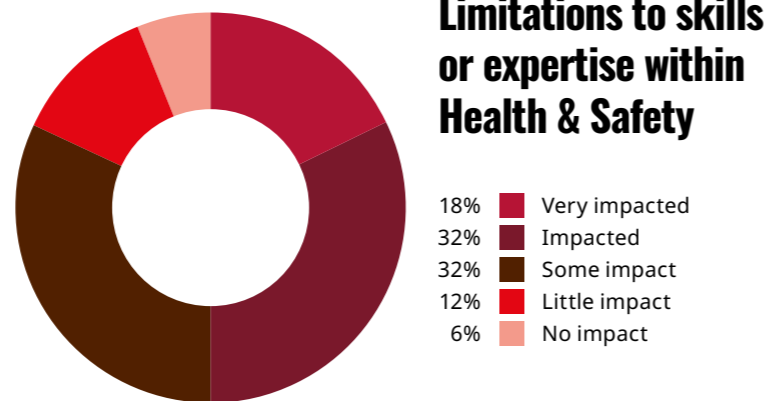
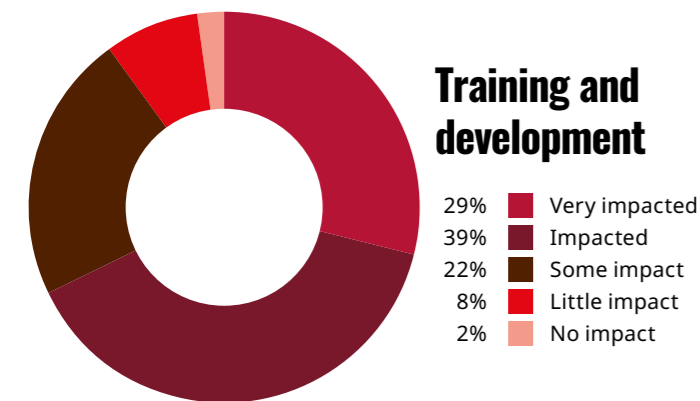
Level of maturity in your business for managing Environment, Health & Safety



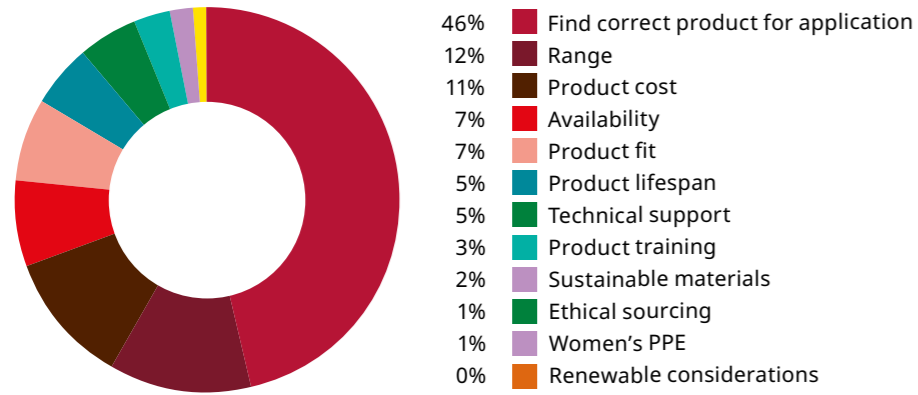
Confidence in business capability for managing.....



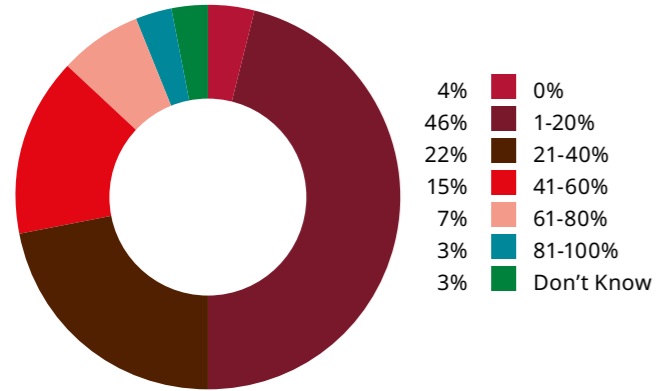
Impact on employee compliance



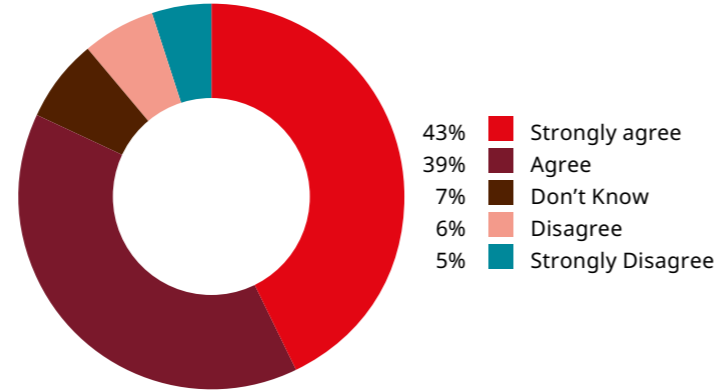
Importance when sourcing PPE



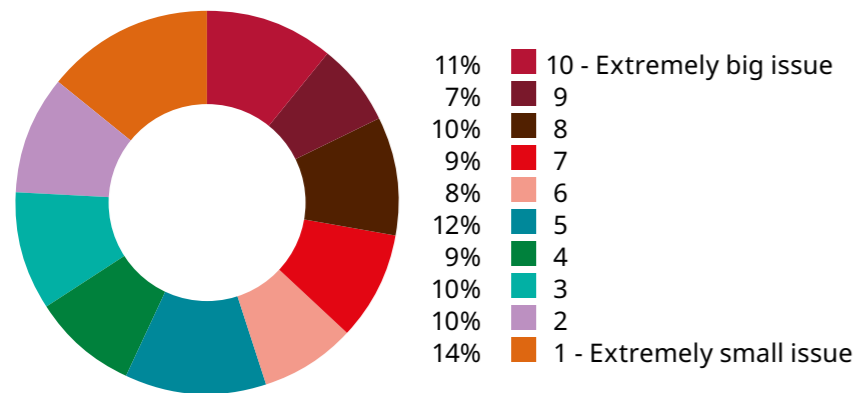
Percentage of people in your organisation requiring PPE are women



'More needs to be done to ensure that PPE is suitable for women in terms of better fit, sizes and suitability'. Do you agree?



How much of an issue is counterfeit / sub-standard quality PPE?





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