

2024

NATIONAL ENVIRONMENTAL SERVICES SURVEY

Insights

Conducted by



ESS

ENVIRONMENTAL SERVICES
& SOLUTIONS EXPO

In association with



Foreword

This report presents the outcomes of the 2024 National Environmental Services Survey, a comprehensive examination of the nation's most pressing environmental concerns. The survey's results will be a focal point at the Environmental Services & Solutions (ESS) Expo, the UK's largest gathering of environmental professionals, taking place on 11-12 September 2024 at the NEC, Birmingham.

Through extensive collaboration with experts and stakeholders nationwide, we have collected valuable data, insights, and unique perspectives. Our aim was to gain a deep understanding of environmental challenges and drive effective solutions. The findings provide an overview of our environment, highlighting the issues and opportunities at hand.

This survey is run in association with leading organisations; the Chartered Institution of Wastes Management (CIWM), The Environmental Services Association (ESA) Groundwork, letsrecycle.com and ESS Expo.

Key Insights

- 94% of respondents believe that Greenwashing is prevalent, a theme continued from the 2023 survey.
- 80% of respondents have concerns about the credibility and transparency of carbon offsetting schemes
- Less than 10% of respondents felt that Government policies were fully supportive in achieving net zero goals.
- 58% of respondents feel there is, or will be a green skills gap.
- 49% of respondents involved in recruitment have experienced difficulties in recruiting candidates from diverse backgrounds.

80%

of respondents
have concerns
about the
credibility of
carbon offsetting
schemes

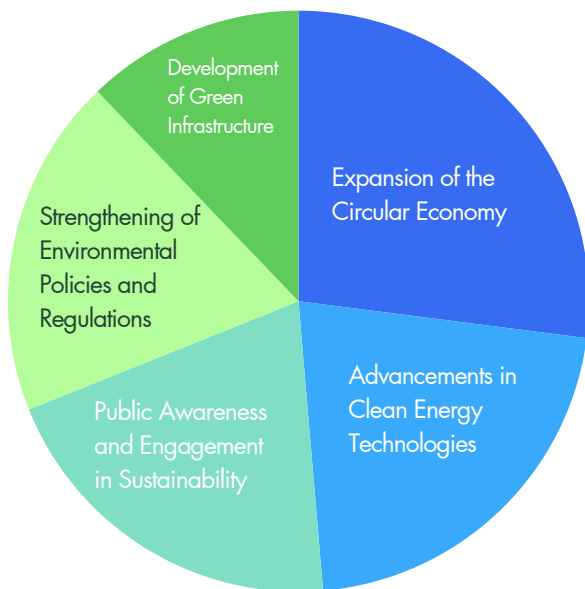
Biggest Issue in Environment and Sustainability

What do you believe is the biggest issue within environment and sustainability today? The top five responses:



Biggest Opportunity in Environment and Sustainability

What presents the biggest opportunity within environment and sustainability today? The top five responses:

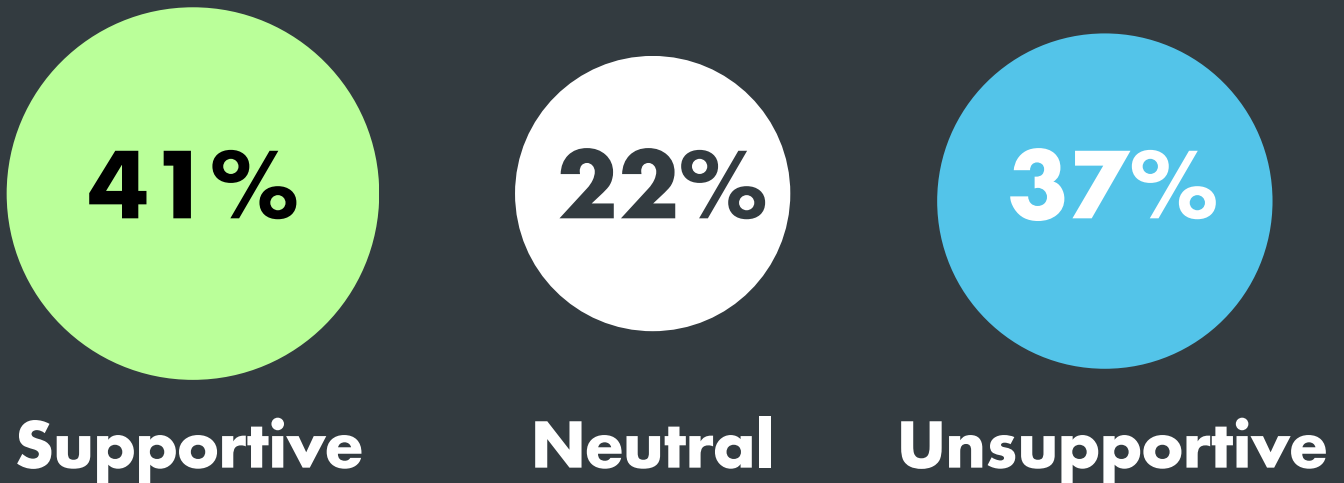


Labels (%)

20%	Expansion of the Circular Economy
16%	Advancements in Clean Energy Technologies
15%	Public Awareness and Engagement in Sustainability
14%	Strengthening of Environmental Policies and Regulations
9%	Development of Green Infrastructure

Extent to Which Current Gov Policies Support Net Zero

To what extent do you believe current government policies support achieving net-zero goals?



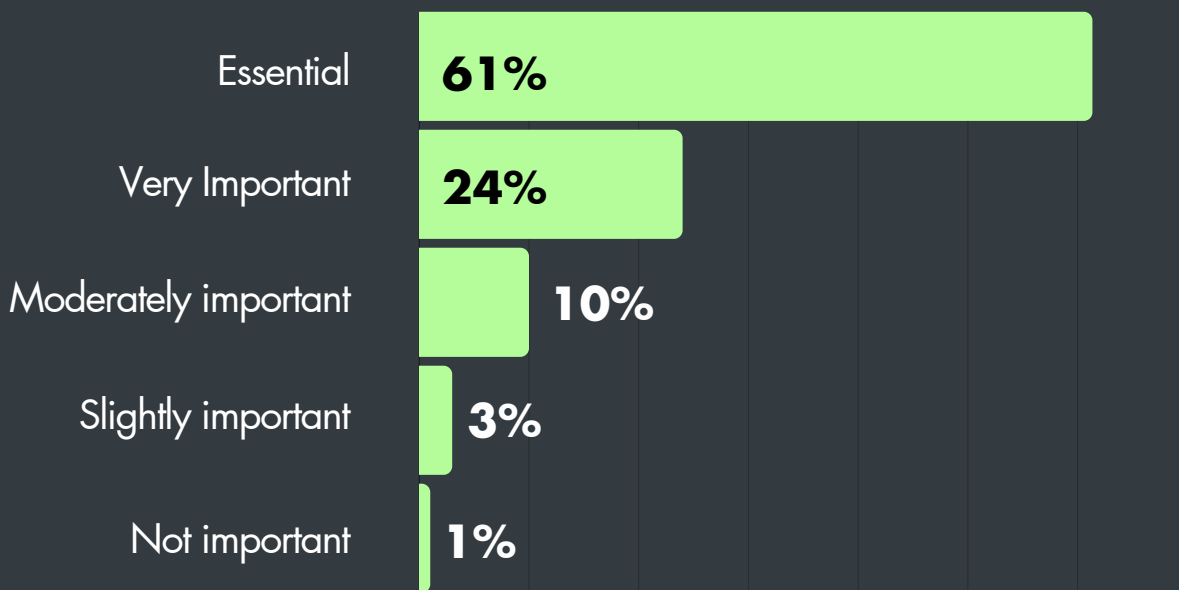
2023 Survey Reflection

11%

in 2023, just 11% of respondents believed that the Government would hit its net zero by 2050 target. Shortly after, the Government watered down its net zero policies.

Partnerships

How important do you believe collaboration and partnerships are in achieving Net-Zero emissions across sectors?



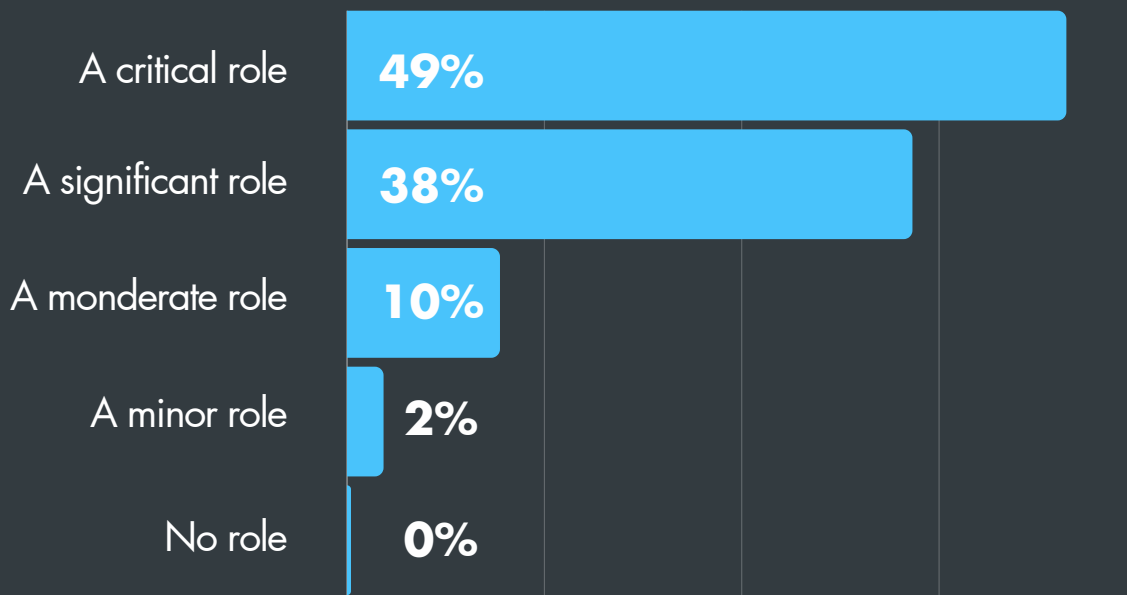
*Note: Percentages have been rounded to the nearest whole number, so the total may not equal 100%

85%

Essential or very important

Technology

What role do you see for innovation and technology in accelerating the path to net zero emissions?



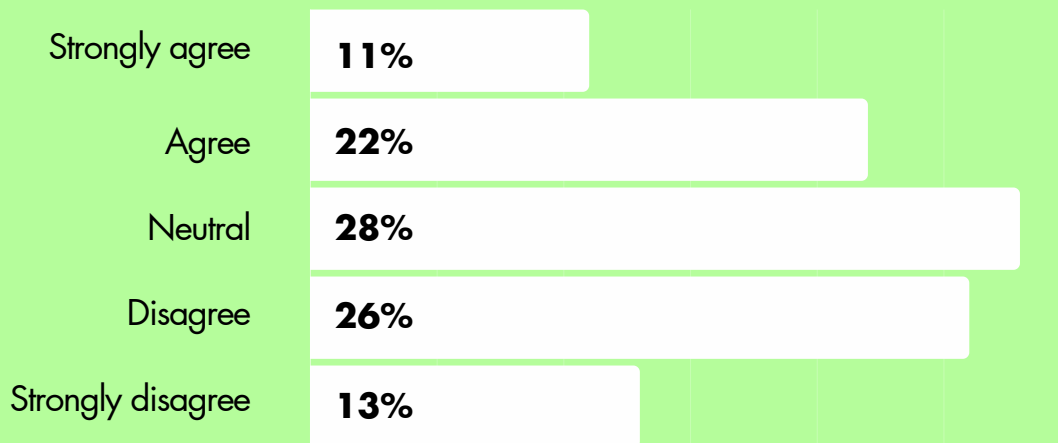
*Note: Percentages have been rounded to the nearest whole number, so the total may not equal 100%

99.7%

Believe technology has a role to play in accelerating the path to net zero emissions

Carbon Offsetting

Do you believe carbon offsetting is a viable strategy for achieving net-zero emissions?



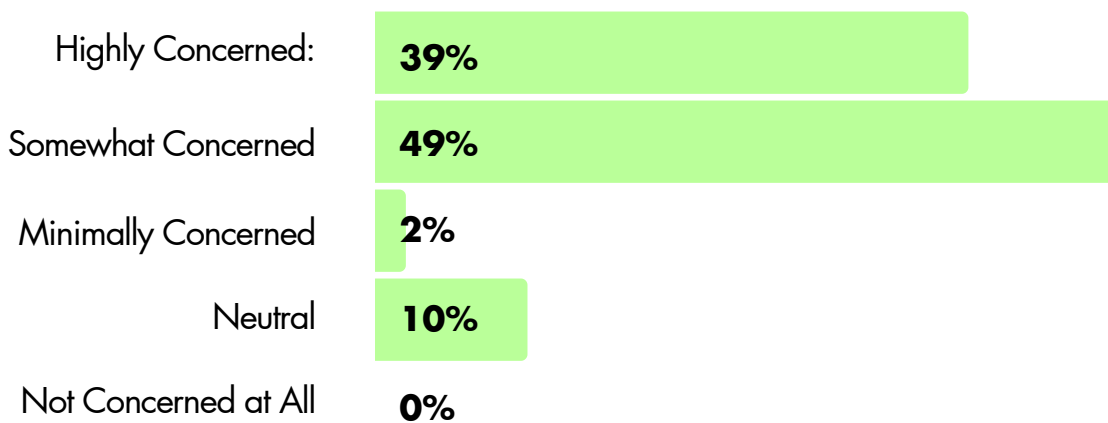
Do you have concerns about the credibility and transparency of carbon credits offsetting schemes?



Carbon Offsetting

Continued...

How concerned are you about the credibility and transparency of carbon credit offsetting schemes?

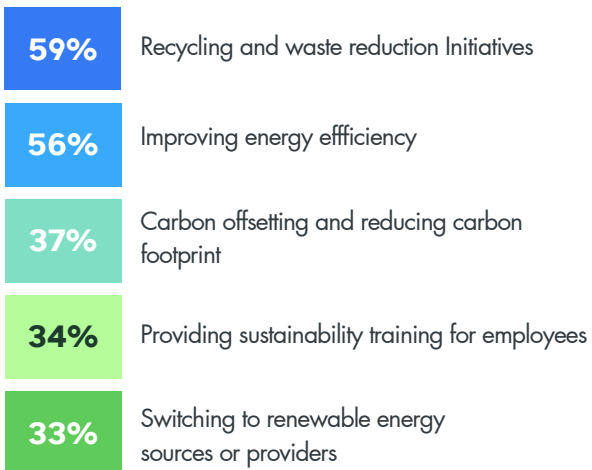


80%
of environmental professionals have concerns
around the credibility and transparency of
carbon offsetting schemes

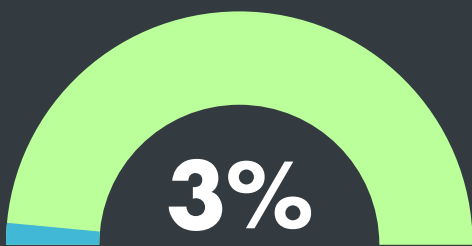
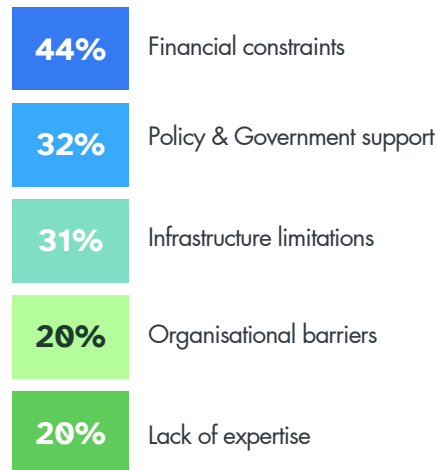
Organisations Within Environmental Sector

Respondents were asked about their organisation's efforts towards net zero.

Which, if any, of the below steps has your business taken to reduce its environmental impact? (top five)



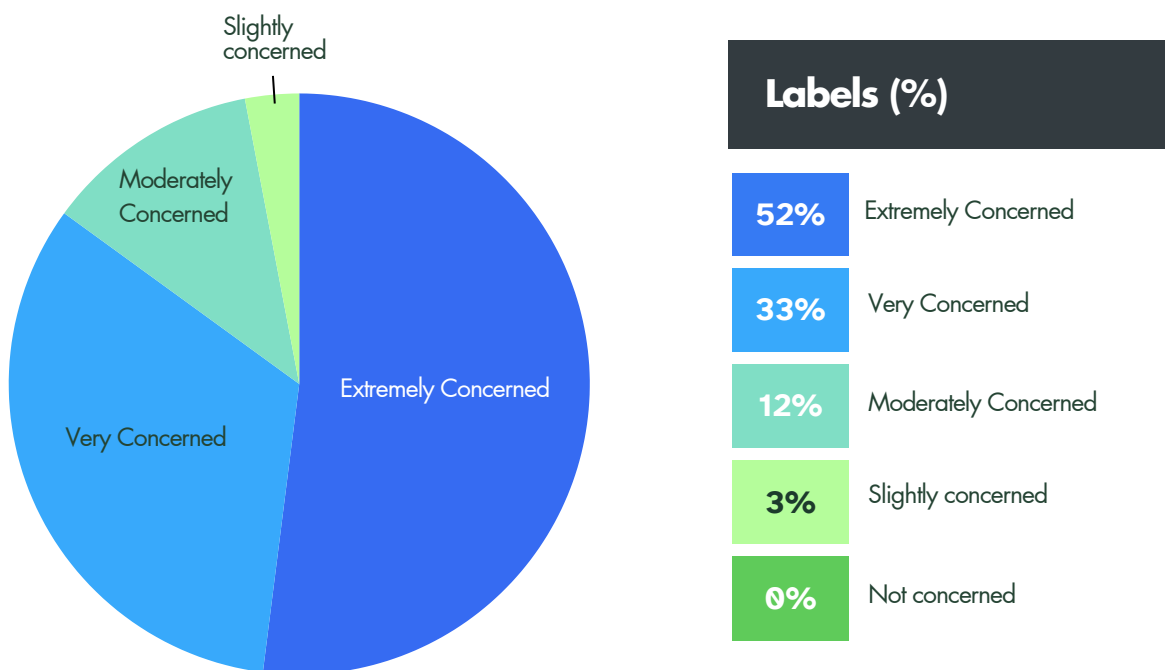
What are the main barriers your organisation faces in achieving net-zero emissions? (top five)



Just 3% of respondents said their organisation was currently net zero.

River Pollution

Please rate your level of concern regarding pollution in rivers caused by industrial activities and sewage overspill.

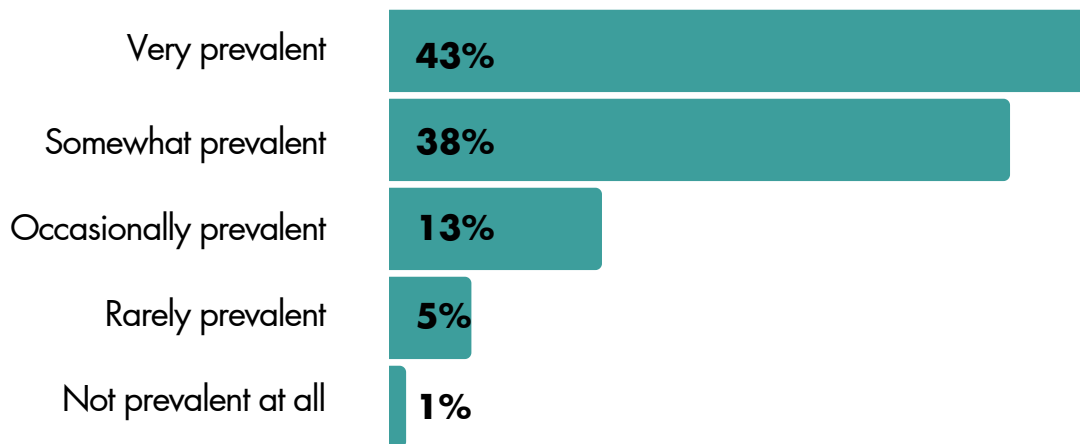


100%

of water sector professionals have concerns for regarding pollution in rivers.

Greenwashing

How prevalent do you believe greenwashing is across industries?



2023 Survey Reflection

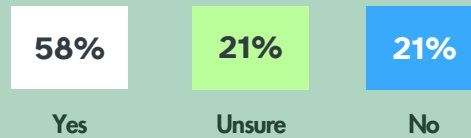
25%

In the 2023 survey, 25% of respondents stated that greenwashing was the one thing they would change about the environment sector.

Green Skills & Recruitment



Do you feel there is, or will be, a green skills gap within your sector?



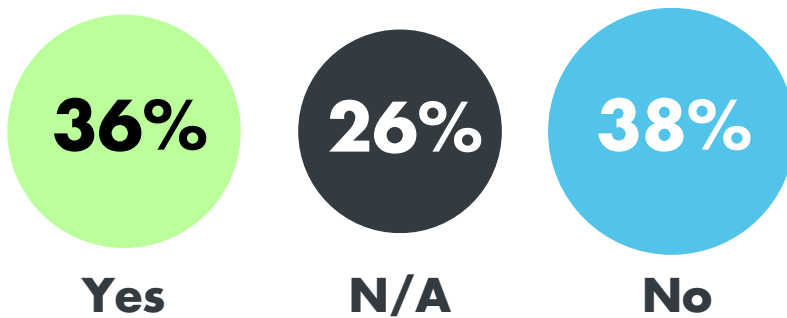
Have you or your organisation experienced difficulties in recruiting diverse candidates?



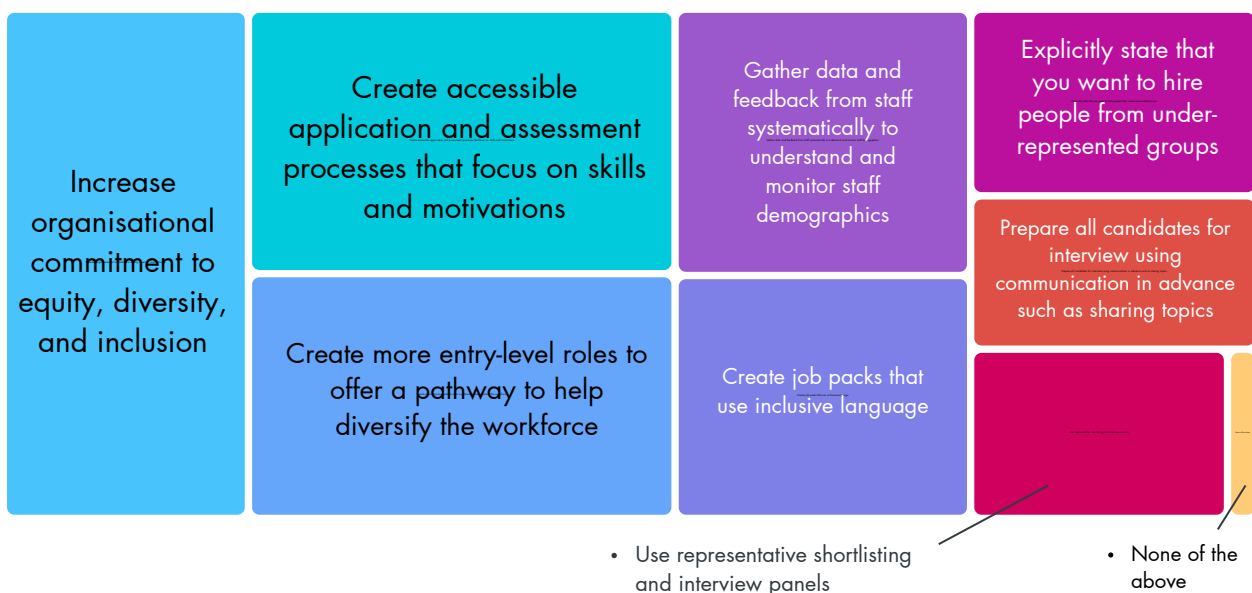
Green Skills & Recruitment

Continued...

Have you already or have you considered making changes to your recruitment practices to encourage more diversity in applicants?



Which changes have you made or have you considered?



Green Skills & Recruitment

Continued...

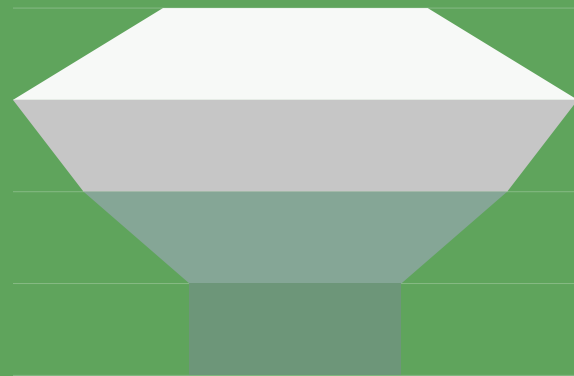
What types of green skills are in most shortage / most in demand?



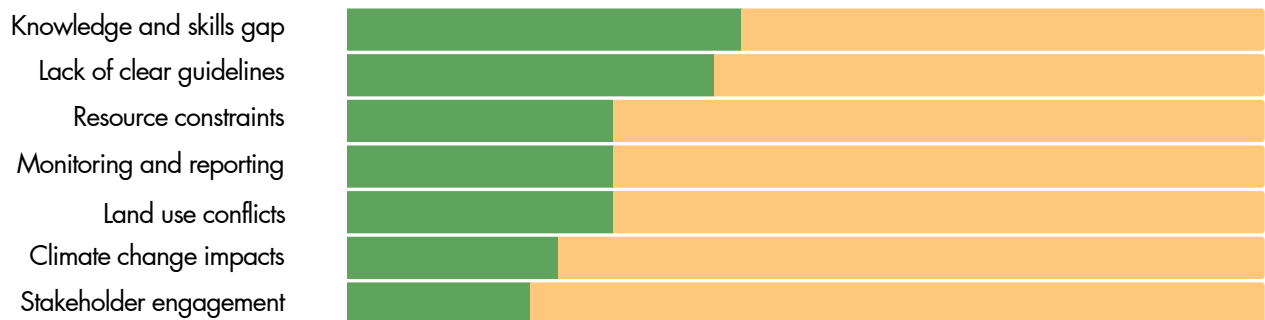
Biodiversity

How prepared is your organisation/sector to implement biodiversity net-gain initiatives?

Fully prepared	15%
Moderately prepared	32%
Somewhat prepared	24%
Not prepared	12%



What challenges do you foresee in measuring and achieving biodiversity net-gain?



Biodiversity

Continued...

What do you consider to be the greatest challenge in promoting biodiversity conservation and natural capital valuation within your sector?



Labels (%)

- 38%** Economic and financial barriers to implementing conservation practices
- 27%** Lack of awareness and understanding of biodiversity's value
- 14%** Difficulty in quantifying natural capital and ecosystem services
- 14%** Insufficient data on biodiversity and ecosystem health
- 8%** Regulatory and policy constraints

*Note: Percentages have been rounded to the nearest whole number, so the total may not equal 100%

Economic & financial barriers

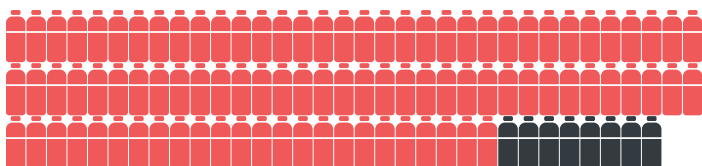
38%

Voted the greatest challenge in promoting biodiversity conservation and natural capital valuation



Resource

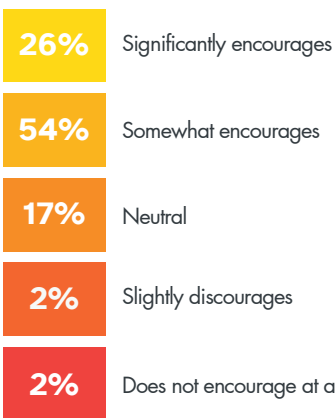
Do you agree with the Government's decision to ban disposable vapes by 2025?



91%

Agree or strongly agree

To what extent do EPR schemes encourage manufacturers to design more sustainable and recyclable products?



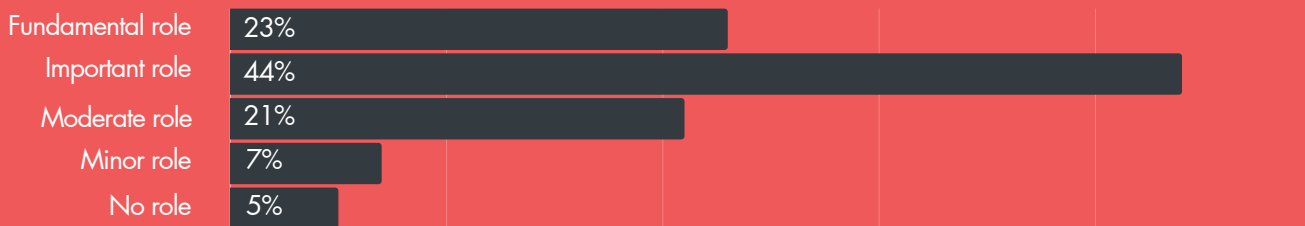
*Note: Percentages have been rounded to the nearest whole number, so the total may not equal 100%

What do you identify as the biggest challenge in the implementation of EPR schemes within your industry?



*Note: Percentages have been rounded to the nearest whole number, so the total may not equal 100%

What role does EPR play in advancing the circular economy in your sector?

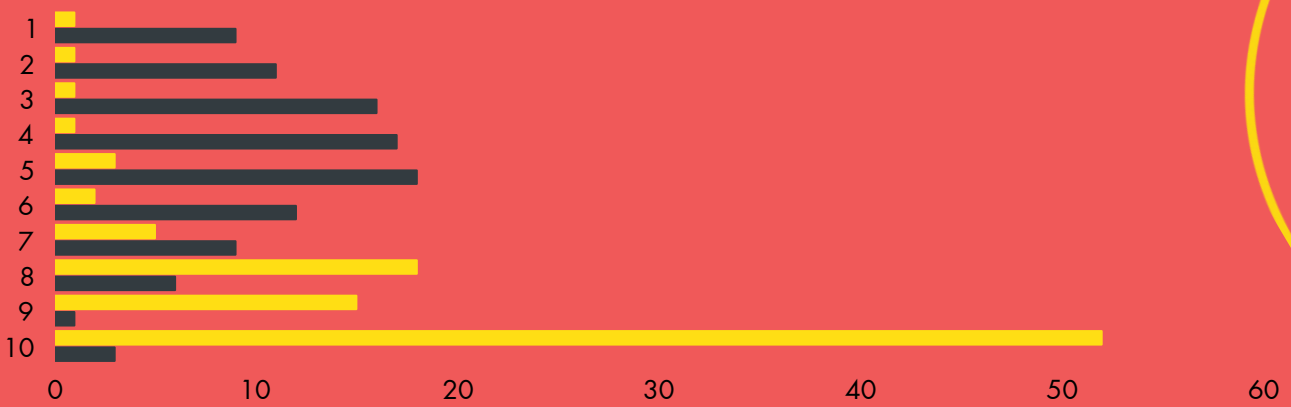




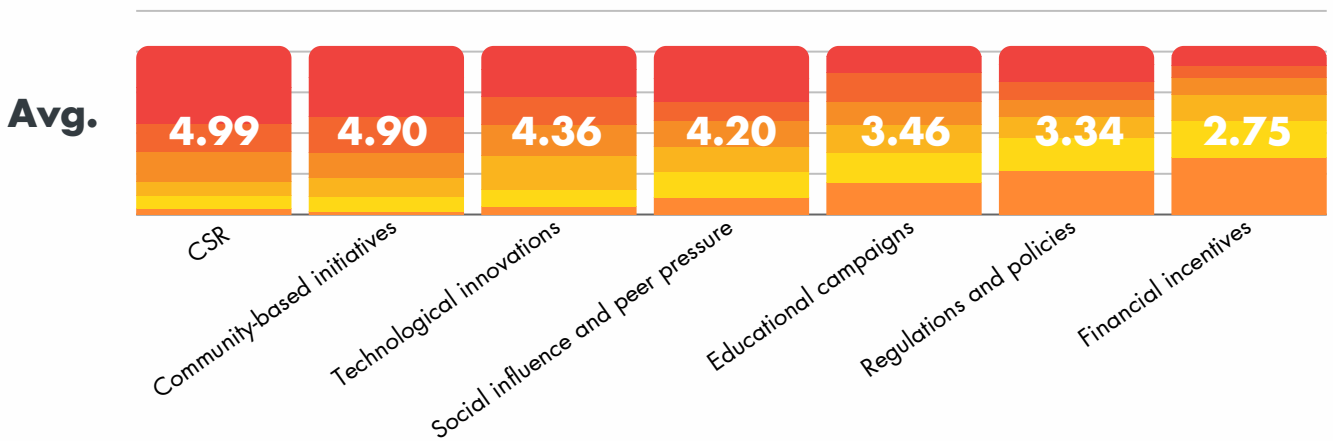
On a scale of 1 to 10, how important do you think it is for the government to prioritise waste prevention and resource use?



On a scale of 1 to 10, how well do you think the government is addressing issues related to waste prevention and resource use?



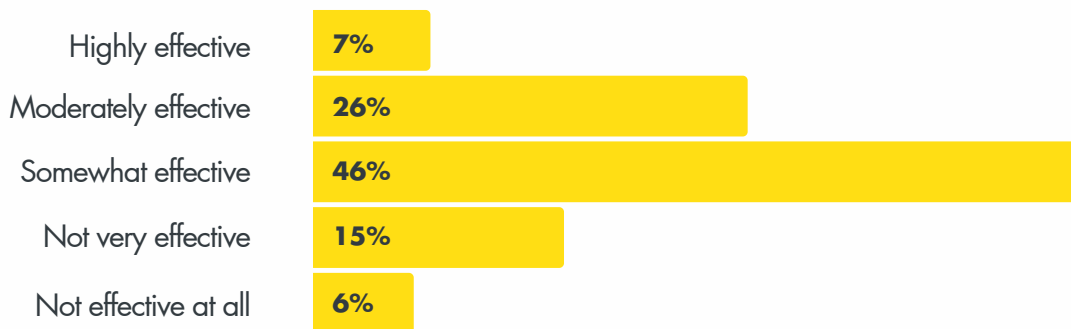
Please rank the following strategies in order of their effectiveness at influencing consumers to adopt more sustainable behaviours. (low is most effective)



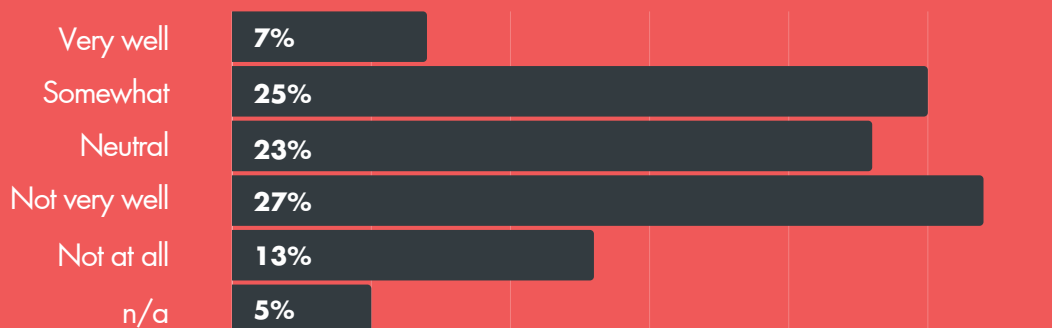
Resource

Continued...

To what extent do you believe the new Emissions Trading Scheme will be effective in reducing emissions in your sector?

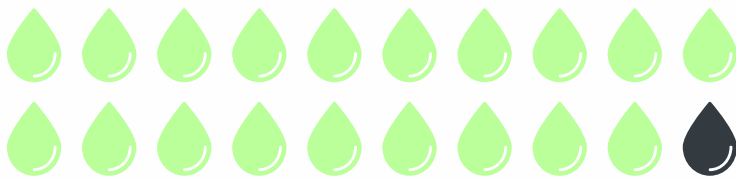


How well do you understand the new Emissions Trading Scheme and its implications for energy from waste and incineration?



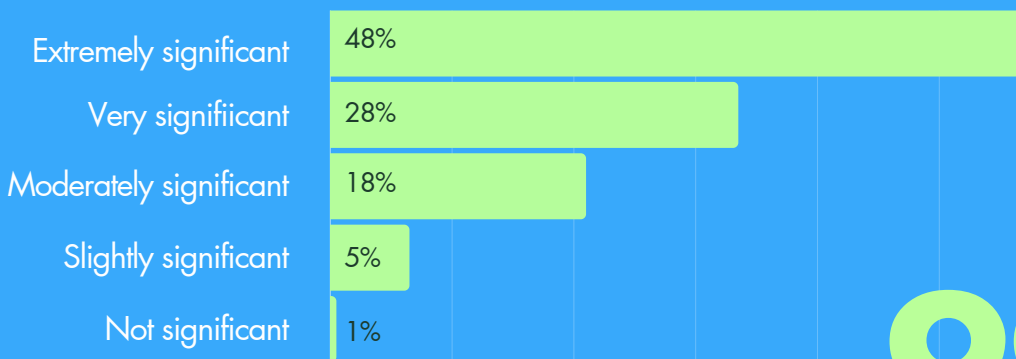
Water

19 out of 20



respondents think drought will impact water resource management

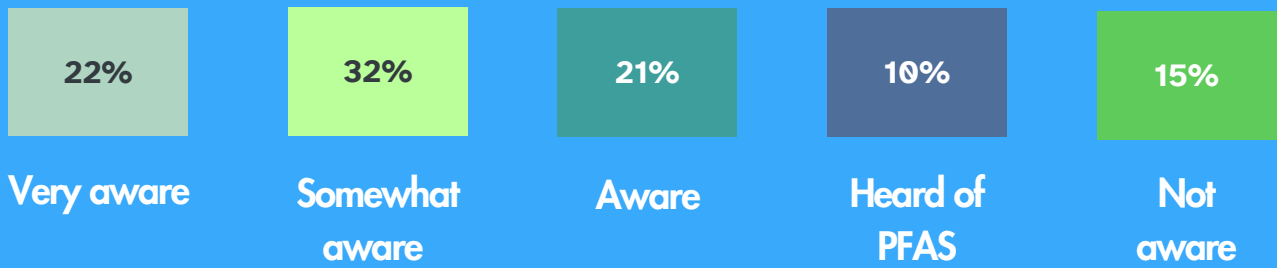
How significant do you believe the impact of climate change will be on water resources management in the next decade?



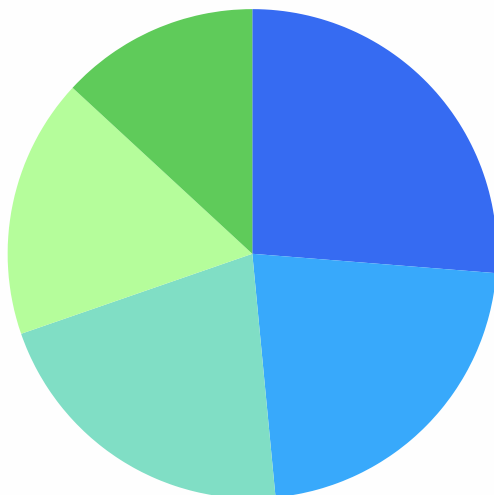
99%

Believe climate change will have some impact on water resources management

How aware are you of the issues and potential environmental health impacts associated with PFAS (Per- and Polyfluoroalkyl Substances)?



Which of the following mitigation strategies do you believe would be most effective in addressing PFAS pollution?



Labels (%)

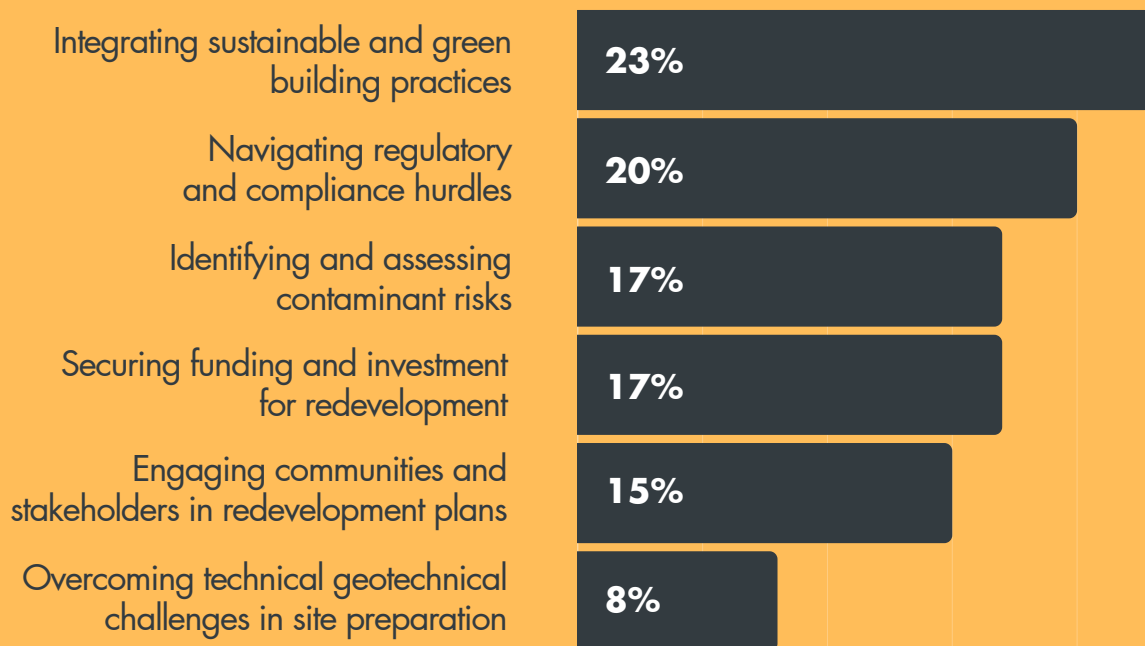
- 26%** Stricter regulation and phase-out of PFAS production and use
- 22%** Encouraging corporate responsibility and transparency in industries known to use PFAS
- 21%** Development and implementation of advanced treatment technologies for PFAS removal
- 17%** Increased research funding for understanding PFAS behaviour and impacts
- 13%** Public awareness campaigns about PFAS risks and safe alternatives

*Note: Percentages have been rounded to the nearest whole number, so the total may not equal 100%



Brownfield

What do you consider to be the greatest challenge facing brownfield regeneration and redevelopment projects?

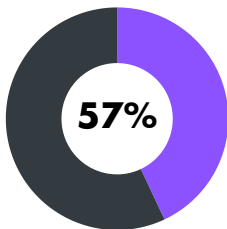


Sustainable practices

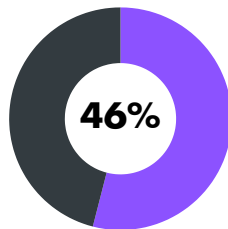
The no. 1 challenge in brownfield regeneration and redevelopment projects.

Sustainability

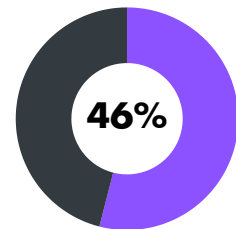
How is your organisation addressing sustainability within its supply chain operations?



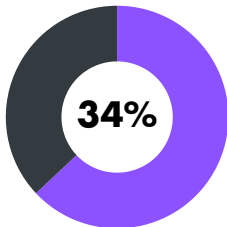
Engaging in partnerships for sustainable material sourcing



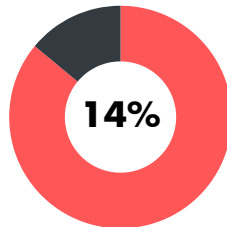
Encouraging suppliers to adopt renewable energy sources



Conducting regular sustainability audits and assessments of suppliers



Implementing strict environmental criteria for suppliers



Not currently addressing sustainability in our supply chain

14%

14% of respondents were not employing any strategies to reduce the environmental impact of its products or services throughout their lifecycle



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