QMS
INTERNATIONAL

RACING TO ZERO? SURVEY REPORT

RACING TO ZERO? BUSINESS ATTITUDES TOWARDS SUSTAINABILITY IN 2021

In 2019, a year of heightened awareness of what we are doing to our planet, the UK government pledged to reach net zero emissions by 2050. Reaching 'net zero' essentially means that we need to achieve a balance between the amount of greenhouse gas emissions produced and the amount removed from the atmosphere.

By making this promise, the government committed the country to reducing its emissions to 100% of their 1990 levels. But while this move certainly triggered the starting gun of the UK's participation in the worldwide race to zero, it seems we are already falling behind.

As it stands, the UK is set to miss its fourth and fifth carbon budgets.
To achieve the sixth, we will need to cut our emissions by a staggering 78%.

If we have any hope of reaching these targets, everyone, including businesses, needs to do their part. This is particularly the case for industries which have traditionally had large carbon footprints. For example, according to the UK Green Building Council, construction currently accounts for a sizeable 10% of the UK's carbon dioxide emissions. The transport and logistics sector's footprint is even more significant, accounting for 27% of total greenhouse emissions.

Smaller changes combined with long-term strategies are key to putting the UK on the right track - and doing so can give businesses advantages that go beyond a reputation for environmental consciousness. For instance, in the report *Manufacturing resilience: driving recovery towards net zero* by the All-Party Parliamentary Manufacturing Group and Policy Connect, it stated that matching the most efficient operator in the manufacturing sector would, on average, enable a business to become 24% more profitable and create 30% more jobs – all while cutting greenhouse gas emissions by 9%.

However, in the wake of the COVID-19 pandemic, have environmental goals fallen by the wayside in favour of more immediate priorities, such as business recovery?

REDUCE, REUSE, RECYCLE: ONE YEAR ON

To find out how business attitudes have changed, QMS International set out to question businesses about their carbon goals, their recycling efforts and their current priorities. By doing so, we were able to compare and contrast the results with those published in our 2020 environmental report, *Reduce, reuse, recycle: Business responses to climate change.*

This previous report, which surveyed SMEs in late 2019, revealed that environmental sustainability was a key business goal, overtaking that of customer satisfaction. It also showed a large range of different tactics being employed to make a business greener, with encouraging numbers reporting the use of recycling bins, recycled products and company-wide 'switch-offs'. However, the report also highlighted a need for longer-term, strategic thinking that would help to ensure that businesses worked towards continual improvement.

Nevertheless, the report revealed encouraging results with only 7% of participants believing that environmental goals were unachievable.

With this follow-up report, which has gathered evidence over the first half of 2021, we will be able to gain an updated picture and establish if environmental business goals have progressed or regressed in the wake of the pandemic.

**What follows is an in-depth analysis of what we discovered.**

1

BUSINESS PRIORITIES

Ranking of business objectives

When we carried out the research for our first report back in 2019, which came on the back of the 'Blue Planet Effect', a tide of protests by environmentalists and speeches by Greta Thunberg, we were not all that surprised to find that environmental sustainability was ranked very highly in a list of business priorities. Indeed, our survey respondents ranked it as their second most important business goal, which even placed it above customer satisfaction. Only staff morale was classed as more important.

The picture is very different in 2021. Despite worsening climate warnings and a year filled with unusual events such as flash flooding in London and Germany, environmental sustainability was only ranked as a number one priority by 1.8% of our respondents and as the second-highest highest priority by 11%. Instead, the vast majority of our respondents (22.9%) put environmental sustainability as their seventh most important priority, an extremely low ranking.

Would you say that environmental sustainability was a bigger or smaller business concern compared to 2018?

Interestingly, this dip in business objective ranking comes despite almost 60% of our respondents agreeing that environmental sustainability is now a bigger business concern compared with 2018.
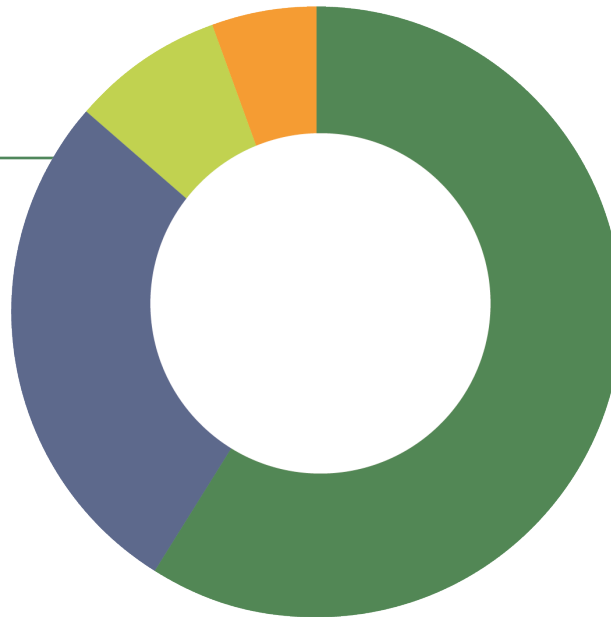
- Bigger
- Unchanged
- Not sure
- Smaller

This abrupt change in priorities can probably be most easily explained by the emergence of the pandemic and the volatile business situation it has produced. This may then explain why the health and safety of workers has now become a top priority for 27.5% of the people we questioned – the new COVID-security rules, the protection of vulnerable staff and the introduction of routine testing have all helped to ensure that health and safety has been at the forefront of business' minds. The pandemic and its consequences may also explain why profit and business growth were ranked as surprisingly low priorities by a significant number of respondents.

This said, it is surprising that coronavirus recovery was not ranked as a top priority by more respondents. Indeed, just 3.7% of those we questioned said that it was their main focus. Meanwhile, 65.1% placed it as the lowest possible priority.

A positive interpretation of this could be that the majority of businesses within our survey have weathered the COVID storm well and have therefore not had to shift their focus to recouping their business in the pandemic's aftermath. Alternatively, it could be that businesses have shifted their focus to customer satisfaction and the provision of high-quality services to help them get back up on their feet.

If COVID is indeed the cause behind the *volte-face* of top business priorities, there is hope that the low ranking of environmental sustainability as an objective will be short-lived. While the effects of COVID-19 are still being felt, it is understandable that environmental sustainability will remain confined to the background. However, when business returns to a more normal state, it is not unrealistic to suggest that businesses will once again turn their attention to greener issues.

QUESTION OPTIONS	PERCENT
Bigger	58.9%
Unchanged	27.7%
Not sure	8%
Smaller	5.4%

Is your business likely to make environmental sustainability a greater priority in the future?

Reassuringly, when asked if their business is likely to make environmental sustainability a greater priority in the future, a significant 66% of respondents agreed, with only 13% answering 'no' and 21% remaining unsure. This gives us hope that environmental sustainability will once again rise in prominence.
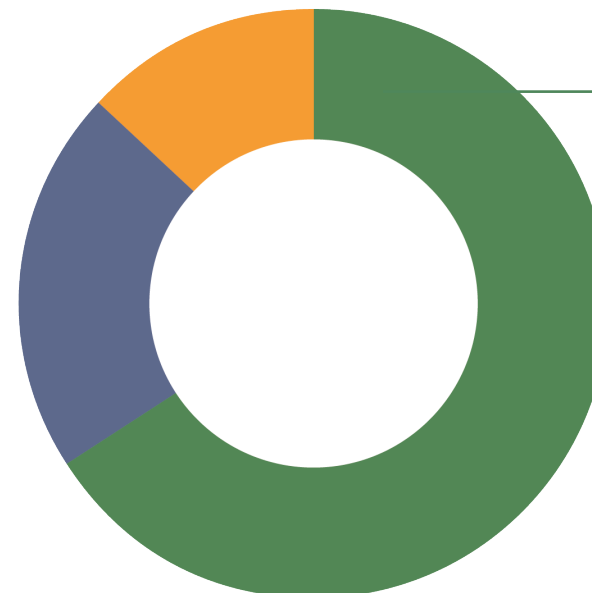
- Yes
- Not sure
- No

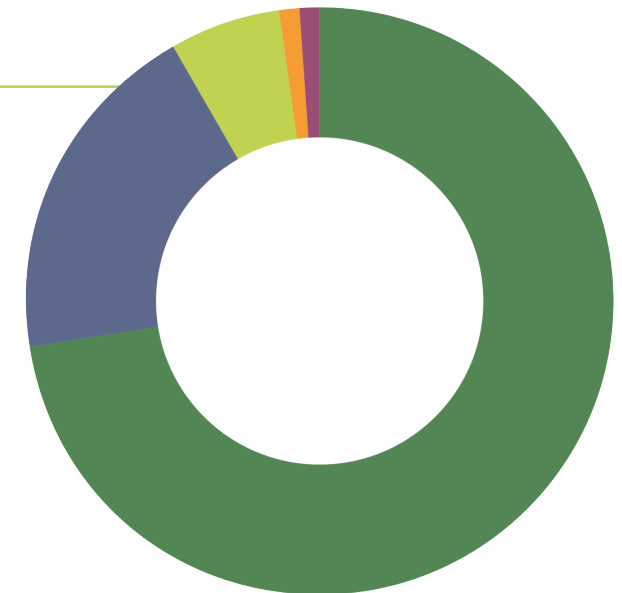| QUESTION OPTIONS	PERCENT
Yes	66%
Not sure	21%
No	13%

2

THE ENVIRONMENTAL IMPACT OF BUSINESS

The provision of products or services means that there are very few businesses who can say that they do not create a carbon footprint.

The use of natural resources, the operation of a business premises, the transportation of goods, the use of equipment and machinery; all of it creates an environmental impact.

How important is it that businesses consider their environmental impact?

It is pleasing to see that 72% of our respondents think that it is 'very important' that businesses consider their environmental impact, a similar proportion to our previous report. Another 19% also stated that it was 'slightly important', which is also encouraging.

There are many things a business can do to control its environmental impact and reduce it. We therefore asked our respondents about the kinds of actions they are already employing and compared their answers with those we published in our 2020 report.

- ● Very important
- ● Slightly important
- ● Neutral
- ● Slightly unimportant
- ● Very unimportant

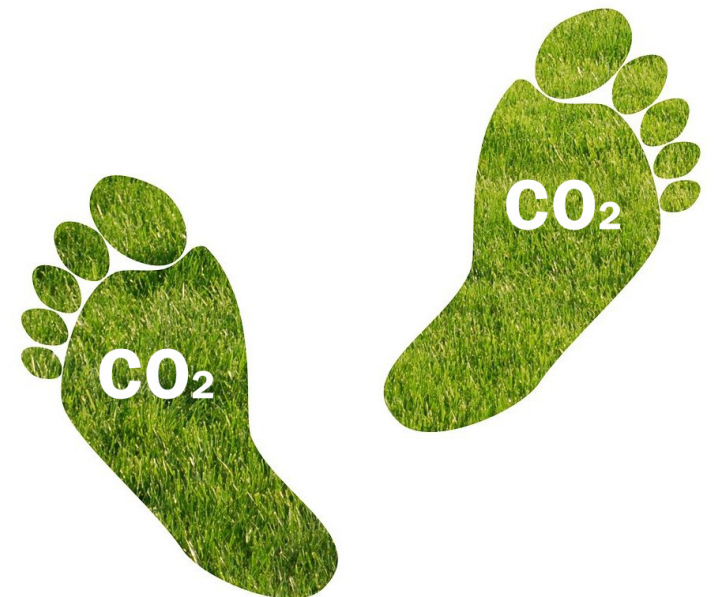| QUESTION OPTIONS	PERCENT
Very important	72%
Slightly important	19%
Neutral	6%
Slightly unimportant	1%
Very unimportant	1%
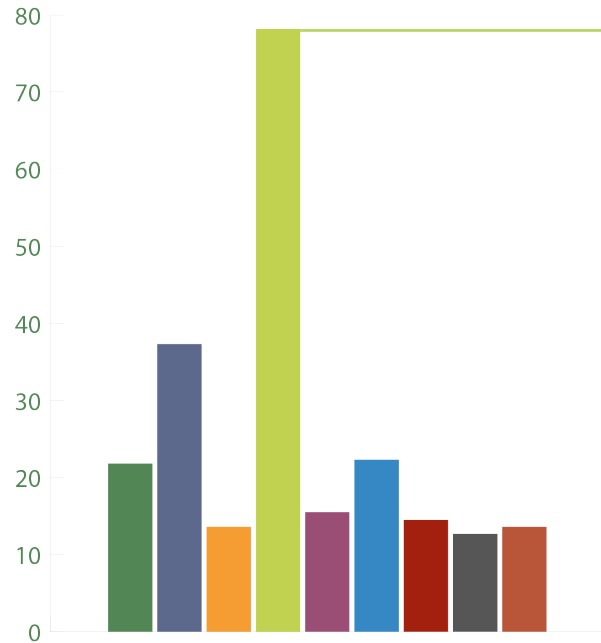
Have you taken any of the following steps to reduce the environmental impact of your business?

When it comes to action, the promotion of recycling remains by far the most popular choice with 85% carrying this out in 2019 and 78.2% doing the same in 2021. This is unsurprising as recycling efforts are the easiest, quickest and cheapest to implement and can be excellent starting points for a business that is looking to brush up on its green credentials.

The reduction of the impact of solid waste generation was the next most popular action in 2021 with 37.3% of respondents selecting this option. This is very encouraging as waste can significantly increase an organisation's carbon footprint but there are many things businesses can do to ensure this waste is more recyclable or that less of it is produced in the first place.

QUESTION OPTIONS	PERCENT
Support and promote recycling efforts	78.2%
Reduce the impact of solid waste generation	37.3%
Consider sustainable building if construction is necessary	22.7%
Use renewable energy sources	21.8%
Contribute to non-profit organisations who help preserve the environment	15.5%
Implemented an environmentally friendly transport policy	14.5%
Reduce the effects of noise, smell or landscape changes	13.6%
None of the above	13.6%
Changed your core products or services	12.7%

- Use renewable energy sources
- Reduce the impact of solid waste generation
- Reduce the effects of noise, smell or landscape changes
- Support and promote recycling efforts
- Contribute to non-profit organisations who help preserve the environment
- Consider sustainable building if construction is necessary
- Implemented an environmentally friendly transport policy
- Changed your core products or services
- None of the above

The next most popular actions were the use of sustainable building and renewable energy, which were chosen by 22.7% and 21.8% of respondents respectively.

There is a notable drop between 2019 and 2021 when it comes to the consideration of sustainable building, which was chosen by 41% in our previous report. This is perhaps another consequence of the disruption caused by the pandemic; building requires a great deal of forethought, planning and investment, factors that may have made it more difficult for businesses in the post-pandemic world.

The percentage for the use of renewable energy has also dropped between 2019 and 2021, although not as drastically. In 2019, 37% of respondents had chosen this action. However, in our latest study, this had slipped to 21.8%. With more energy companies offering greener deals and the option to switch to a renewable energy tariff, it is a little disappointing that this figure has dropped to less than a quarter of our participants.

When it comes to contributing towards not-for-profit organisations who help to preserve the environment, there is less of a difference between 2019 and 2021. In our previous report, we found that 18% were carrying this out, which has reduced slightly to 15.5% of respondents in 2021. However, in 2019 this option was the least popular action whereas in 2021 it is sitting comfortably in the middle.

In 2021, perhaps one of the most disappointing results is that only 14.5% of respondents said that they were implementing an environmentally friendly transport policy. This marks a very significant drop from the 31% of respondents who were carrying this out in 2019. This is again surprising given the advances made in electric vehicles and the approaching bans on the sale of new petrol and diesel cars. It has also now been announced that the sale of diesel HGVs will be stopped in 2040. With more businesses likely to feel the pressure of switching to greener transport over the next few years, these results suggest that more organisations need to start planning for the future and how they will govern their transport.
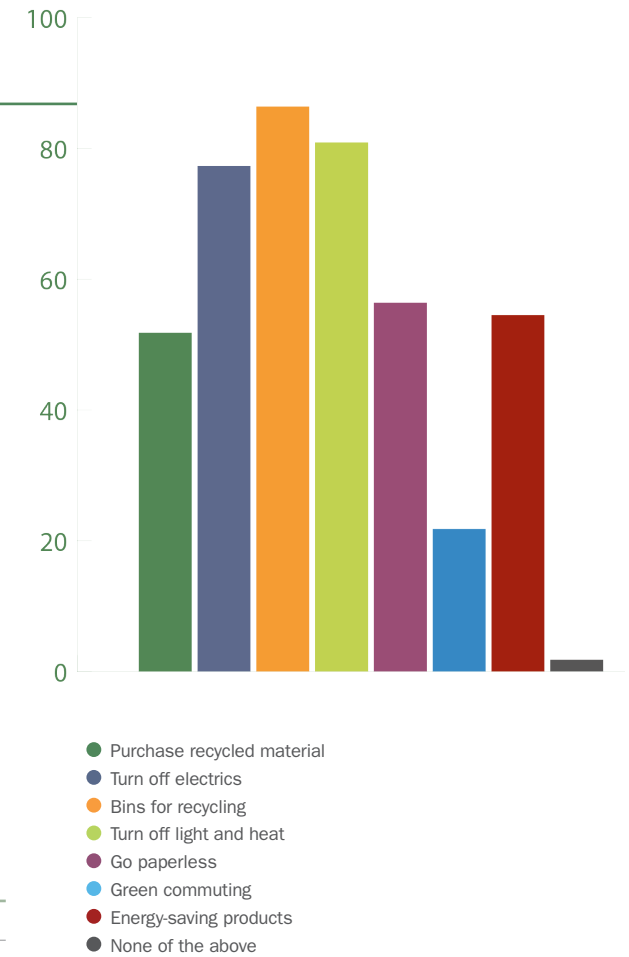
3

MINOR ACTIONS TO REDUCE IMPACT

Does your business take any of the following minor actions to help reduce your impact on the environment?

We also questioned our survey respondents on other minor actions that they could be employing to reduce their impact.

As in 2019, the most popular action was to place separate bins for recycling into the workspace with 86.4% doing this compared with 90% in the previous report. This is unsurprising due to the low cost and effort of this action.

Turning off heating and lighting also remained popular with 80.9% doing this, while 77.3% turn off electronics every evening.

- ● Purchase recycled material
- ● Turn off electrics
- ● Bins for recycling
- ● Turn off light and heat
- ● Go paperless
- ● Green commuting
- ● Energy-saving products
- ● None of the above

QUESTION OPTIONS	PERCENT
Bins for recycling	86.4%
Turn off light and heat	80.9%
Turn off electrics	77.3%
Go paperless	56.4%
Energy-saving products	54.5%
Purchase recycled material	51.8%
Green commuting	21.8%
None of the above	1.8%

Something that has gained in popularity is the implementation of a paperless policy, which has risen to 55.6% of respondents, up from 31% in 2019. This is likely to be due to the rapid increase in remote or hybrid working, which has meant that printing facilities have not been accessible to employees.

On the other hand, the purchase of recycled products has dropped between our two surveys. In 2019, a sizeable 70% of our respondents said that they were doing this, but in 2021 this had fallen to just over half (51.8%). A similar reduction can be seen in the percentage of respondents who are using energy saving products (82% in 2019 compared to just 54.5% in 2021).

Another noticeable drop can be seen in the proportion of respondents who have been encouraging green commuting. Previously, we found that 46% of respondents had enforced this action, but in 2021 just 21.8% were doing the same. This could be attributed to the fact that staff travel had dropped considerably during the various lockdowns, but if staff are now returning to work their employers need to consider this minor action once again.

This could also explain why fewer respondents in 2021 reported using energy saving products – with fewer, if any, staff in the workplace, there was no demand to switch to more energy-saving products.

When we look at the percentages taking minor actions and align them with the number of employees, we can see some other interesting trends. Most notably, companies with 11-15 employees were less likely to take minor actions, even when it comes to very simple changes such as putting out separate bins for recycling.

We can also see that enforcing a paperless policy becomes generally more difficult for larger businesses with more employees.

What is also clear is that the largest businesses (86-125 employees and 126+ employees) need to do more when it comes to purchasing recycled products and encouraging green commuting. As large employers, implementing these minor actions could have a significant impact on their carbon footprint, which make them hugely worthwhile.

On the following page, we have gathered some examples of other actions that our respondents told us about.
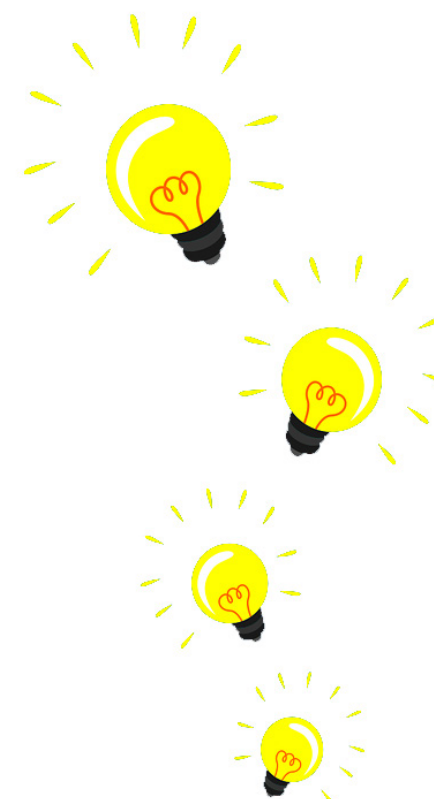
	Number of Employees								
	0-5	6-10	11-15	16-25	26-45	46-65	66-85	86-125	126+
Purchase of recycled material	50%	46%	56%	71%	50%	64%	100%	22%	39%
Turn off electrics	77%	85%	56%	93%	67%	82%	100%	78%	100%
Bins for recycling	83%	69%	78%	93%	100%	91%	100%	89%	100%
Turn off lights and heat	73%	85%	67%	100%	83%	82%	75%	89%	85%
Go paperless	63%	69%	56%	64%	33%	55%	50%	33%	54%
Green commuting	27%	8%	22%	21%	17%	18%	50%	22%	23%
Energy-saving products	57%	62%	44%	50%	67%	55%	50%	22%	77%

"We use suppliers in our geographical area to reduce the amount of transport required."

"We send none of our waste to landfill."

"We've now installed solar panels on site to benefit from free, clean energy."

"Our green commuting policy has been helped by the installation of electric car charging points."

"We've been off-setting our carbon footprint by planting more than 600 trees a month."

"We operate hybrid vehicles."

"We have upgraded office lighting to LED and plan to change all lighting in the building accordingly by the end of 2021."

"We contact registered waste disposal companies to collect all our waste, so that this can be recycled where possible or treated to reduce its impact."

4

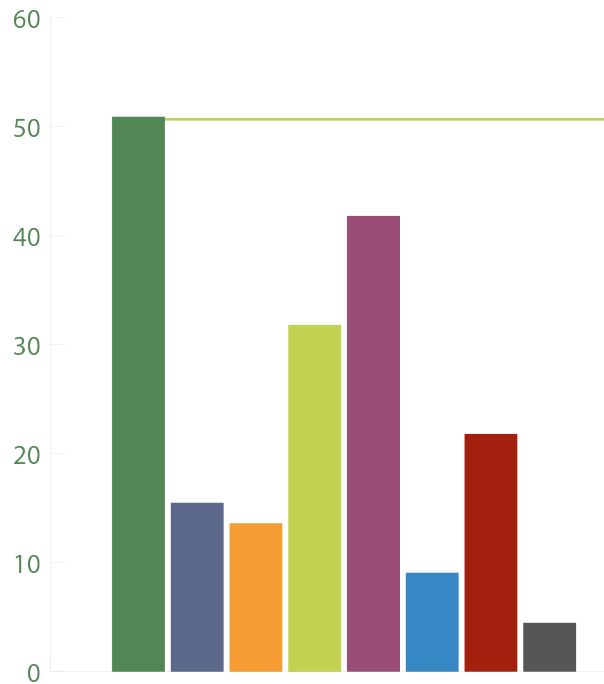# BARRIERS TO CHANGE

"Our business isn't doing enough to act. There is a lot of government blocking and our council is not setting up enough safe routes for us to encourage green commuting."
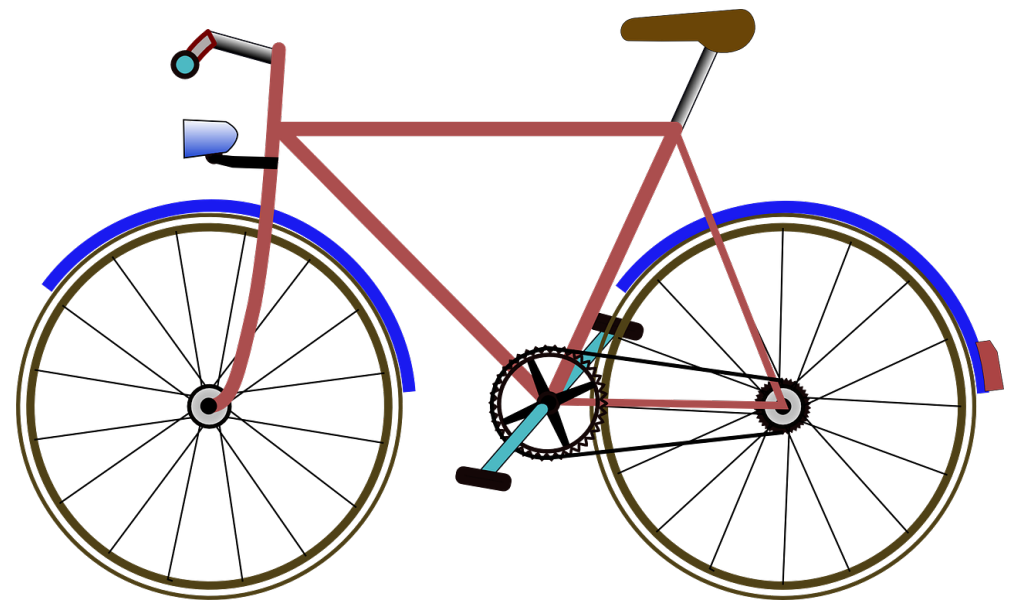
Legend:
- Customer requirements
- Shared workspace
- Remote working
- Work carried out in customer spaces
- Finances
- Lack of leadership
- Other business priorities
- Other

Do any of the following limit your goals to reduce your organisation's environmental impact?

Of course, some businesses have their hands tied when it comes to making green changes. We therefore asked our respondents about the barriers they face when it comes to reducing their impact.

The most significant barrier was customer requirements, which stood at 50.9%. This is somewhat surprising and merits further investigation. Product and service innovation is key for businesses being able to move forward and become greener, so the fact that their own customers are seen as an impediment to this is concerning. It also doesn't fit with the emerging picture of post-pandemic customers, which we go on to look at in the section 'customers and green credentials' on page 20.

QUESTION OPTIONS	PERCENT
Customer requirements	50.9%
Finances	41.8%
Work carried out in customer spaces	31.8%
Other business priorities	21.8%
Shared workspace	15.5%
Remote working	13.6%
Lack of leadership	9.1%
Other	4.5%

Finances were also highlighted by 41.8% of our respondents, which is not unsurprising. New technologies and greener ways of working can require significant investment, although the long-term cost savings can be very rewarding, as can the improvements in a company's reputation and standing.

Workspaces are another common barrier with 31.8% citing the fact that work is carried out in customer spaces and thereby limits their ability to be greener. Another 15.5% work in shared spaces, which also makes action harder.

Barriers put up by the government and local councils were also referred to by some respondents. For instance, one respondent commented: *"Our business isn't doing enough to act. There is a lot of government blocking and our council is not setting up enough safe routes for us to encourage green commuting."*
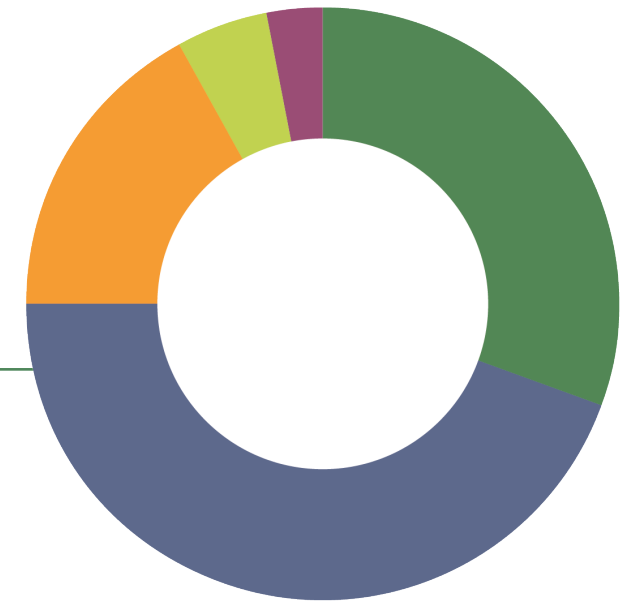
5

SUSTAINABILITY AND EMPLOYEES

- Slightly important
- Very important
- Neutral
- Quite important
- Not important at all

## How important is environmental sustainability to your employees?

It is important to remember that many minor actions depend on the motivation or impetus of employees. It is therefore encouraging that 31% of our respondents said that environmental sustainability was 'very important' to their employees while 45% said that it was 'slightly important'. This should hopefully ensure that future actions to reduce environmental impact are taken forward by business staff.

QUESTION OPTIONS	PERCENT
Slightly important	45%
Very important	31%
Neutral	17%
Quite important	5%
Not important at all	3%

Are your employees aware of any changes you have made to improve your business' environmental impact?
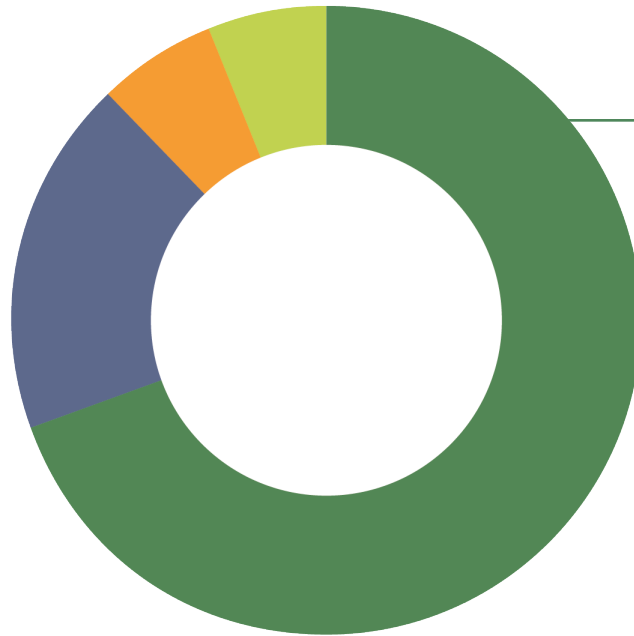
- Yes
- Not sure
- No
- No changes made

QUESTION OPTIONS	PERCENT
Yes	69%
Not sure	18%
No	6%
No changes made	6%

Communication to workers about changes to reduce a business' environmental impact also seems to be quite good with 69% saying that their employees were aware of changes made to improve it.

6

COVID-19 AND ENVIRONMENTAL IMPACT

Has the pandemic reduced or increased your business' environmental impact?

Due to the implementation of new restrictions designed to keep people safe and prevent the spread of the virus, many businesses had to change their ways of working. While 55% of our respondents said that these changes had not altered their business' environmental impact as a result, more than a quarter (29%) said that these changes had had a positive effect on their impact by reducing it.

The switch to remote working seems to have had the biggest influence on this reduction with many respondents citing the resulting reduced energy usage as being key to cutting their carbon footprint. Another respondent also pointed out that remote working meant that their staff were not using the printers or paper supplies, another environmental saving. Virtual meetings and the reduced need for travel were also cited.

However, there were also 9% of participants who said that their environmental impact had increased as a result of the pandemic. Reasons for this included the need for PPE and other disposable items intended to maintain hygiene. One participant also reported that their turnover had increased during the pandemic and their products became more in demand. As a result, they began using more packaging and transportation in order to deliver their products to customers, increasing their environmental impact.
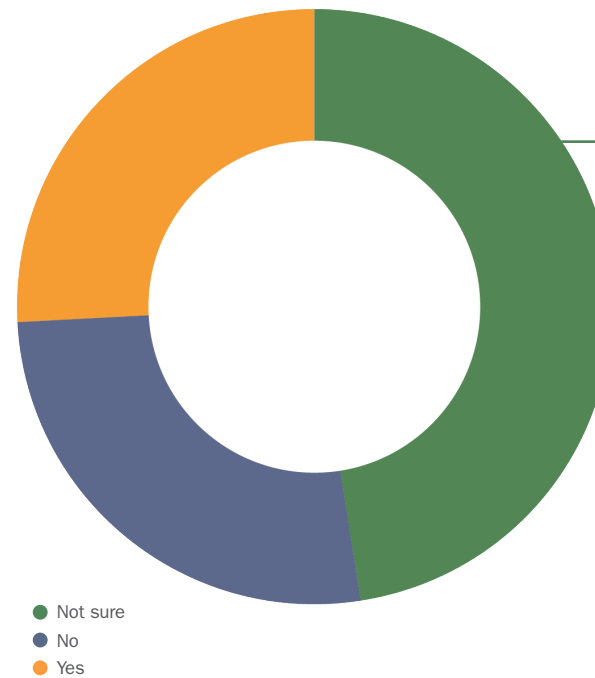
- ● No change
- ● Reduced
- ● Increaased
- ● Not sure

QUESTION OPTIONS	PERCENT
No change	55%
Reduced	29%
Increased	9%
Not sure	7%

7

GOING CARBON NEUTRAL

Does your business have any ambitions to become carbon neutral?

The end goal of many environmental plans is to get businesses carbon neutral. This is an incredibly difficult task and would require many businesses to completely transform their current ways of working. It is therefore not surprisingly that only a little over a quarter (26%) of our respondents said that they had an ambition or plan to go carbon neutral.

However, it is encouraging that only 27% replied with a definite 'no'. The vast majority (48%) of our participants were more unsure, which gives rise to the hope that more businesses will gradually find ways of making this transformation possible. This was certainly the case for one participant, who commented: "We'd like to be carbon neutral but feel it is a good way off for a variety of reasons. We therefore do all we can to limit our carbon footprint and reduce it as we grow."

- Not sure
- No
- Yes

QUESTION OPTIONS	PERCENT
Not sure	48%
No	27%
Yes	26%
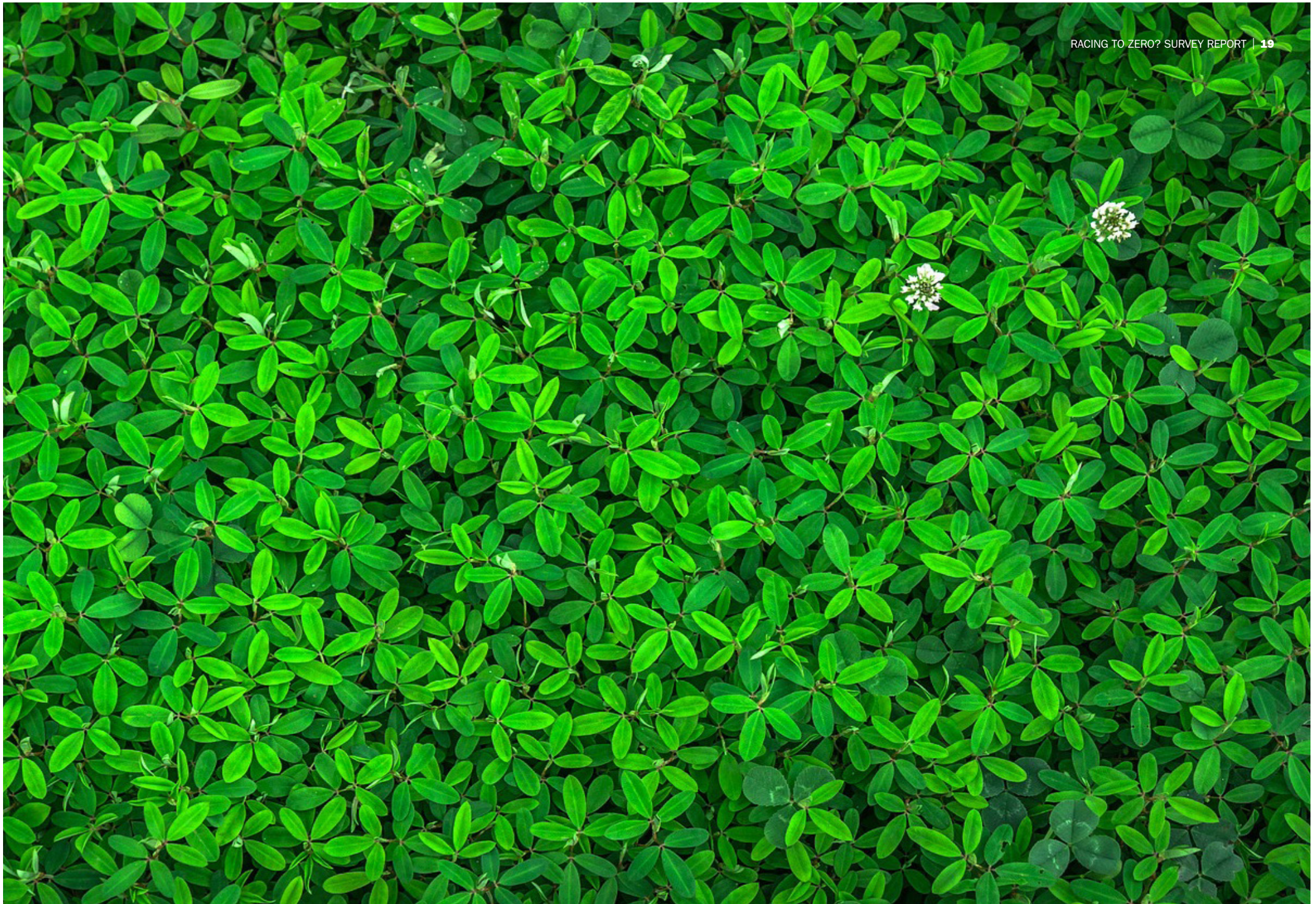
8
CUSTOMERS AND GREEN CREDENTIALS

The pandemic and the rapid change in the way we lived our lives, how we shopped and what we bought have meant that many people have re-evaluated their values and priorities when it comes to what they buy and what services they use. This will inevitably have a knock-on effect when it comes to the businesses they work with.

Indeed, a new study by Accenture of 25,000 consumers across 22 countries[1] revealed a new type of customer they have given the moniker 'reimagined' to. The research also revealed five key values of these new influential consumers. These values included product origin, which incorporates a focus on the environment, sustainability and corporate responsibility.

[1] Accenture, 2021. https://www.accenture.com/gb-en/insights/strategy/reimagined-consumer-expectations

How important are your business' green credentials to your customers or clients?

Our results show that the respondents we questioned are aware of their customer and clients' growing interest in the environment and sustainability. Of those we questioned, 22% reported that their business' green credentials were 'very important' to their customers while 47% said that they were 'quite important'. This raises the question of why a significant proportion of businesses have downgraded the importance of their business' environmental sustainability when it is clearly an aspect of their business that interests clients. By downgrading its importance, this could put businesses out of sync with their client base in the very near future.
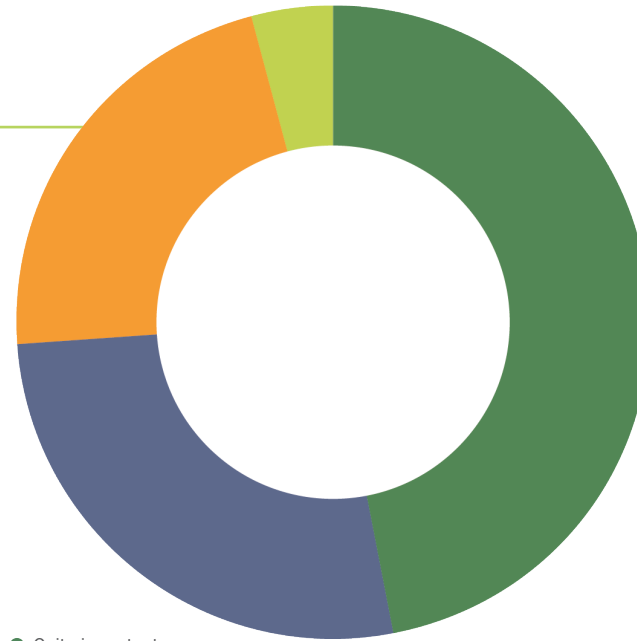
- Quite important
- Not very important
- Very important
- Not important at all

QUESTION OPTIONS	PERCENT
Quite important	47%
Not very important	27%
Very important	22%
Not important at all	4%

When broken down by sector, only 11.1% of those in the engineering sector reported that green credentials were 'very important' to their clients. Even more surprisingly, 22.2% responded that it was 'not at all important'. This is striking as engineering can be a sector that generates a significant carbon footprint and there are many improvements the industry can make to shrink this.

More promising is the fact that 34.6% of respondents working in the construction sector said that green credentials were very important to their clients. This is positive as the sector is responsible for a large proportion of the UK's emissions and will be a key sector for change going forward.

"Working in the renewable construction industry, my experience is that the sector is actively aware of its carbon footprint and impact on the environment. From development through to completion, projects are now driven by carbon footprint."

9

LEGAL RESPONSIBILITIES

To help drive the country towards net zero, the government has been introducing more stringent laws and regulations governing environmental impact and business' interaction with the environment.

Compliance is therefore key to these legal responsibilities.

With this in mind, we set out to ask our respondents about their knowledge. Overall, the results are very positive with respondents showing good comprehension of their commitments, as can be seen in the table.

Legal responsibility	Pollution	Waste disposal	Water and land contamination	Hazardous substances
68.1% very aware	59.8% very aware	78.2% very aware	59.8% very aware	68.1% very aware

Legal resonsibility

Pollution

Waste disposal

Water and land contamination

Hazardous substances

0 20 40 60 80 100

- Very aware
- Slightly aware
- Not very aware
- Not at all aware
- Doesn't apply
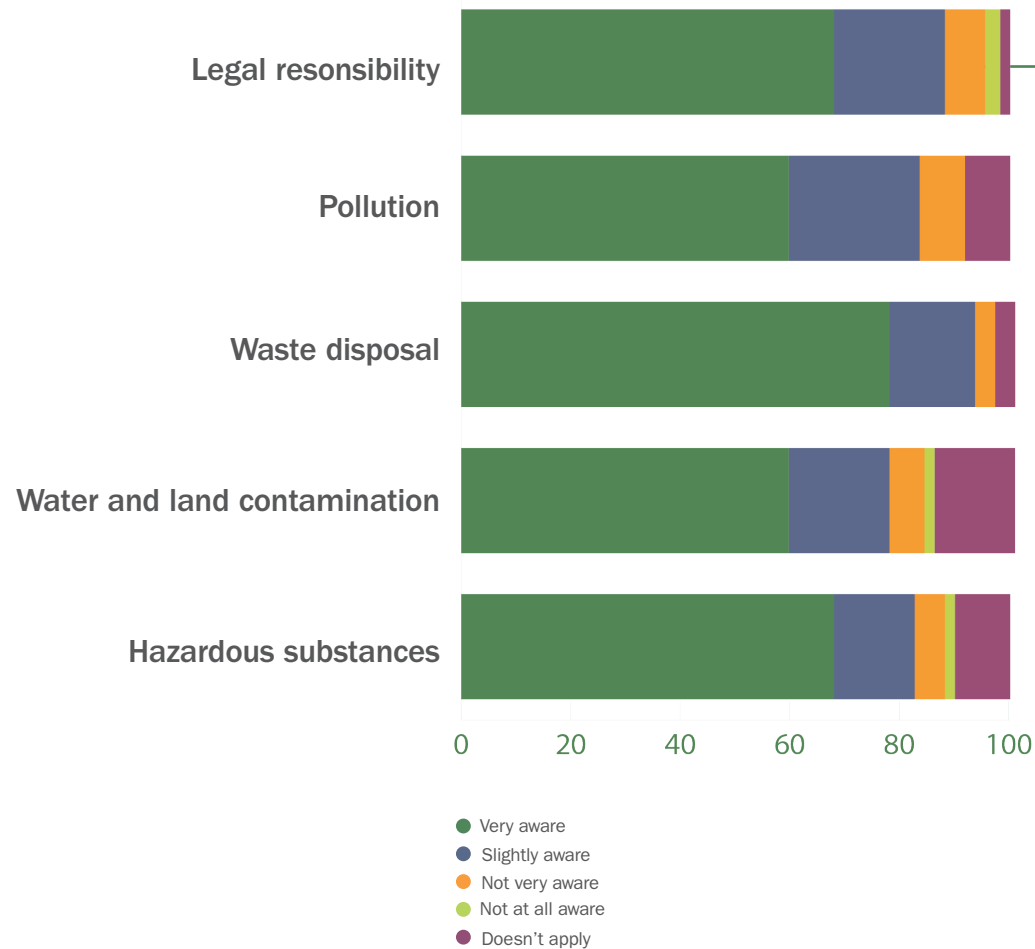
How aware are you of the legal responsibilities for your organisation?

When it comes to those respondents who answered 'not very aware' or 'not at all aware', the results are very similar to those published in our previous report.

- Pollution: 8.3% were not very aware or not at all aware (compared to 9% in 2019)

- Waste disposal: 3.7% were not very aware or not at all aware (compared to 3% in 2019)

- Water and land contamination: 8.2% were not very aware or not at all aware (compared with 8% in 2019)

- Hazardous substances: 7.3% were not very aware or not at all aware (compared with 9% in 2019)

Although these proportions are small, it is perhaps still a little disappointing that these percentages have not shrunk further and suggests that businesses need to do more to ensure their knowledge is up to date and that they are fully compliant with the law.

Legal resonsibility

QUESTION OPTIONS	PERCENT
Very aware	68.1%
Slightly aware	20.3%
Not very aware	7.4%
Not at all aware	2.8%
Doesn't apply	1.8%

Pollution

QUESTION OPTIONS	PERCENT
Very aware	59.8%
Slightly aware	24%
Not very aware	8.3%
Not at all aware	0%
Doesn't apply	8.3%

Waste disposal

QUESTION OPTIONS	PERCENT
Very aware	78.2%
Slightly aware	15.6%
Not very aware	3.7%
Not at all aware	0%
Doesn't apply	3.7%

Water and land contamination

QUESTION OPTIONS	PERCENT
Very aware	59.8%
Slightly aware	18.4%
Not very aware	6.4%
Not at all aware	1.8%
Doesn't apply	14.7%

Hazardous substances

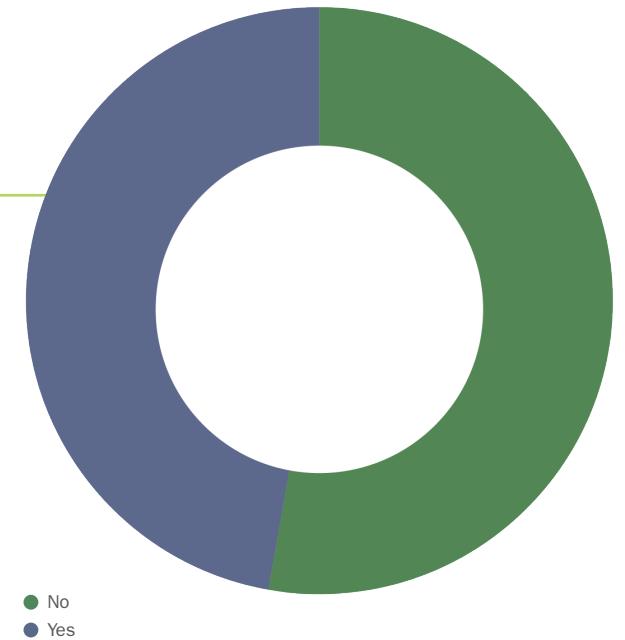| QUESTION OPTIONS	PERCENT
Very aware	68.1%
Slightly aware	14.7%
Not very aware	5.5%
Not at all aware	1.8%
Doesn't apply	10.1%

10

ENVIRONMENTAL MANAGEMENT SYSTEMS

Does your business have an environmental management system (such as ISO 14001) in place?

Our research then went on to investigate the role of environmental management systems in respondents' businesses.

Environmental management systems include frameworks such as ISO 14001, which is the international Standard for environmental management, developed by global experts and published by the International Organisation for Standardisation (ISO).


● No
● Yes

QUESTION OPTIONS	PERCENT
No	53%
Yes	47%

They help organisations to develop a robust framework of processes that enable a business to control its environmental impact by identifying risks and efficiencies, monitoring and evaluating operations and ensuring compliance. They also introduce the concept of continual improvement to ensure the organisation continues to work on their environmental performance.

Of our respondents, 47% already have an environmental management system in place, which suggests that there is a general understanding of what they do and how they can support a business' environmental ambitions.
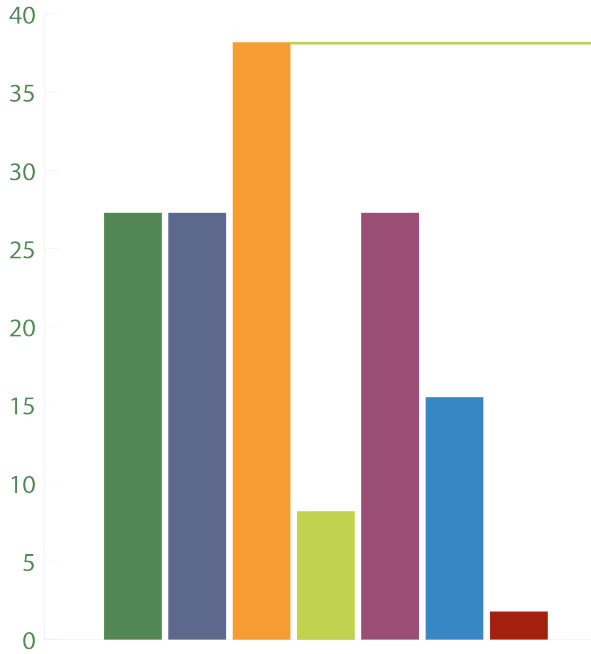
## Why did you implement an EMS?

The most popular reason for implementing it was to improve business image and reputation, which was selected by 38.2% of our respondents with a system in place. This was closely followed by the prevention or control of pollution, limiting climate change and access to more business opportunities (27.3% each). Cost savings were also selected by 15.5% of our participants. The lowest spur to action was reported to be the adoption of it by other businesses, which was selected by only 8.2% of respondents.

- To help prevent or control pollution
- To limit climate change
- Improve business image and reputation
- Because similar businesses are adopting it
- Access to more business opportunities
- To generate cost savings
- Other

QUESTION OPTIONS	PERCENT
Improve business image and reputation	38.2%
To limit climate change	27.3%
To help prevent or control pollution	27.3%
Access to more business opportunities	27.3%
To generate cost savings	15.5%
Because similar businesses are adopting it	8.2%
Other	1.8%

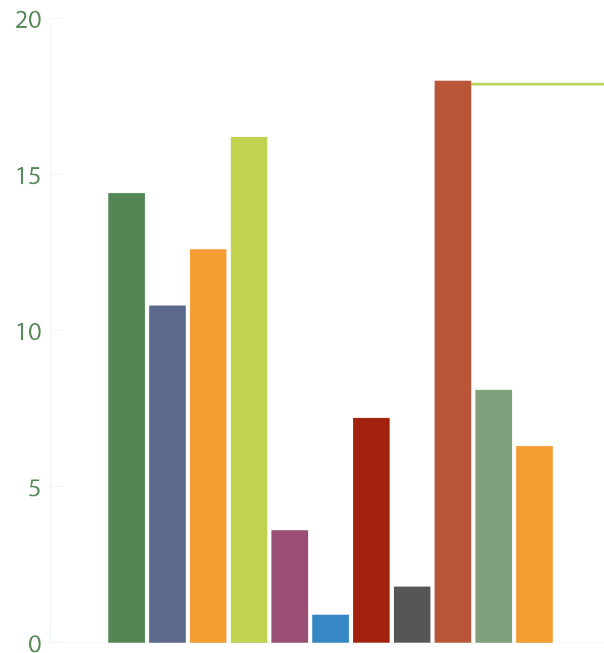## "We have been using our ISO 14001 to monitor and measure CO_2 and to offset it."

Have you considered an environmental management system?

- No
- Yes
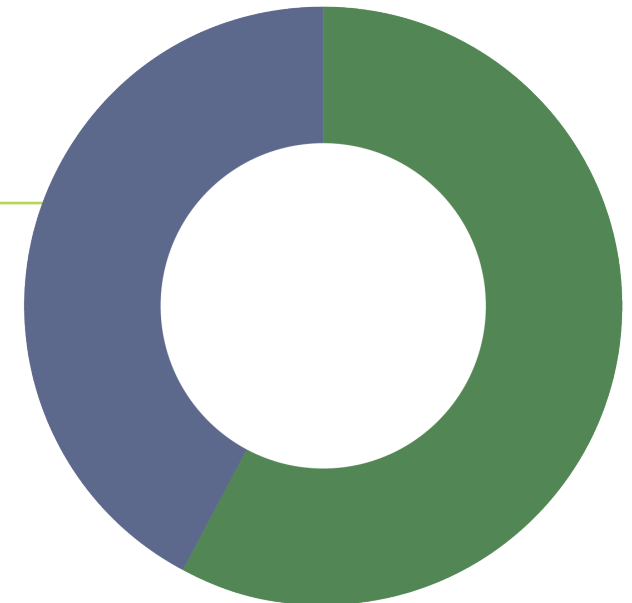
QUESTION OPTIONS	PERCENT
No	58%
Yes	42%

Why have you not implemented an environmental management system?

Of those who do not have a system in place, 42% said that they had considered it. The reasons for not implementing one appear to be diverse, and it is encouraging that only 1.8% said that they were not aware of environmental management systems and only 7.2% reported that they didn't know enough about it.

However, it is concerning that a significant 18% of our respondents also reported that their business does not need an environmental management system. This is surprising as ISO 14001 is designed to work for organisations of all sizes and respondents may be surprised by how the processes of an environmental management system can streamline their work, revealing cost efficiencies and new ways to reduce waste. This suggests that there still needs to be more communication about the benefits of these systems.

Other than the perceived lack of need, the most popular reason our participants gave for not having implemented one is that the process is viewed as being too expensive. This reflects general business concerns about the cost of making their business more sustainable and environmentally conscious.

A lack of time is another common theme with 14.4% saying that they just hadn't gotten round to it and another 12.6% voicing concerns that the process is too time-consuming.

QUESTION OPTIONS	PERCENT
Business does not need one	18%
Process is too expensive	16.2%
Not gotten round to it yet	14.4%
Process is too time-consuming	12.6%
Timing is wrong for the business	10.8%
Business is already doing enough	8.1%
Don't know enough about it	7.2%
Other	6.3%
Need to be convinced by review	3.6%
Not aware of EMS at all	1.8%
Failed to persuade leadership	0.9%

CONCLUSION

Overall, it is possible to see a fairly positive picture when it comes to business attitudes towards the environment and sustainability. There is a general acknowledgement of the impact business activities have upon the environment and businesses agree that action to tackle this is important. Our research also shows that many businesses have already taken positive steps in this direction, implementing separate recycling bins and other minor actions to begin to steer their businesses in the right direction.

However, these results have also revealed that businesses need to think hard about their priorities going forward.

Thanks to net zero targets, change is coming and businesses need to be prepared for this reality, which is likely to require sweeping long-term change.

Detailed strategies need to be developed and implemented to make this possible, but businesses continue to report significant barriers to this. Greater communication of the benefits of change will be key here, as will customer demand. When more businesses become aware of changed customer priorities, it is likely that they will in turn be spurred into action, altering their products and services and transforming their operations into less impactful ones.

The longer term effects of changes enacted during the pandemic have also yet to emerge. So far, these changes have had a positive effect on business' sustainability and environmental impact, but the permanence of these changes is in doubt and could well be reversed. However, the rapid way in which businesses had to adapt to the conditions of the pandemic is promising as it shows that businesses are indeed capable of the agility needed to transform their operations into a new model, something that is likely to be needed if we are to achieve net zero.

Finally, more education is needed on what environmental management systems are, how they work and how they can help businesses. As laws and regulations become more stringent and more clients expect evidence of a business' environmental control, management systems such as ISO 14001 are likely to become more necessary and can give businesses the framework they need to adapt to change in the future.

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