

The Dräger UK Safety at Work Report 2022



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WELCOME!

I am delighted to introduce the 2022 Dräger UK Safety at Work Report. For those not familiar with this report, it summarises the findings of our annual, independent research aimed at capturing the views of employees and managers on the topic of safety in UK workplaces. The result is a regular annual snapshot of the current status of workplace safety here in the UK; a topic that Dräger both knows – and cares – a great deal about.



This year's findings once again provide fascinating insight, and as well as building on themes introduced in last year's report, such as the intriguing look at safety in renewable energy ("Safety and the UK Renewables Rush: The forgotten frontier"), it also touches on the implications of new and very topical issues affecting the safety workers today. Such issues include the current global supply chain problems, global instability, as well as the growing adoption of digital and connected safety as part of advances in Industry 4.0 technology.

We also take a look at the important role of workplace culture and changing attitudes to mental health, and the role that both of these important topics have in keeping people safe at work.

Finally, the report considers the transfer of safety knowledge between generations – or lack thereof – when it comes to the UK's energy transition: is the knowledge and experience of the mature safety culture in the UK's oil and gas industry transferring to renewable energy industries and carbon capture?

Whatever your role, and whichever sector you work in, I hope that this report provides useful insights.

Matthew Bedford

KEY FINDINGS

The majority of the UK workforce feels safer at work than they did a year ago, echoing government data outlining that the UK ranks second place in workplace safety in Europe.

- However, threats do exist: This year's research shows that these threats arise from the global supply chain problems, whether it's from issues moving goods as a result of Brexit or availability of goods such as semiconductors and potential impacts on health and safety in UK workplaces. In addition there are growing concerns around the risk of a major disaster, and a loss of experienced workers, partly due to record levels of churn in the employment market.
- In the clean energy sector in particular, workers believe there is room for improvement in terms of equipment and training and experts believe that there is need for legislation in order to better protect workers.

More positively, business needs may drive employers in traditionally less open work cultures to make mental health as much of a priority as physical health.

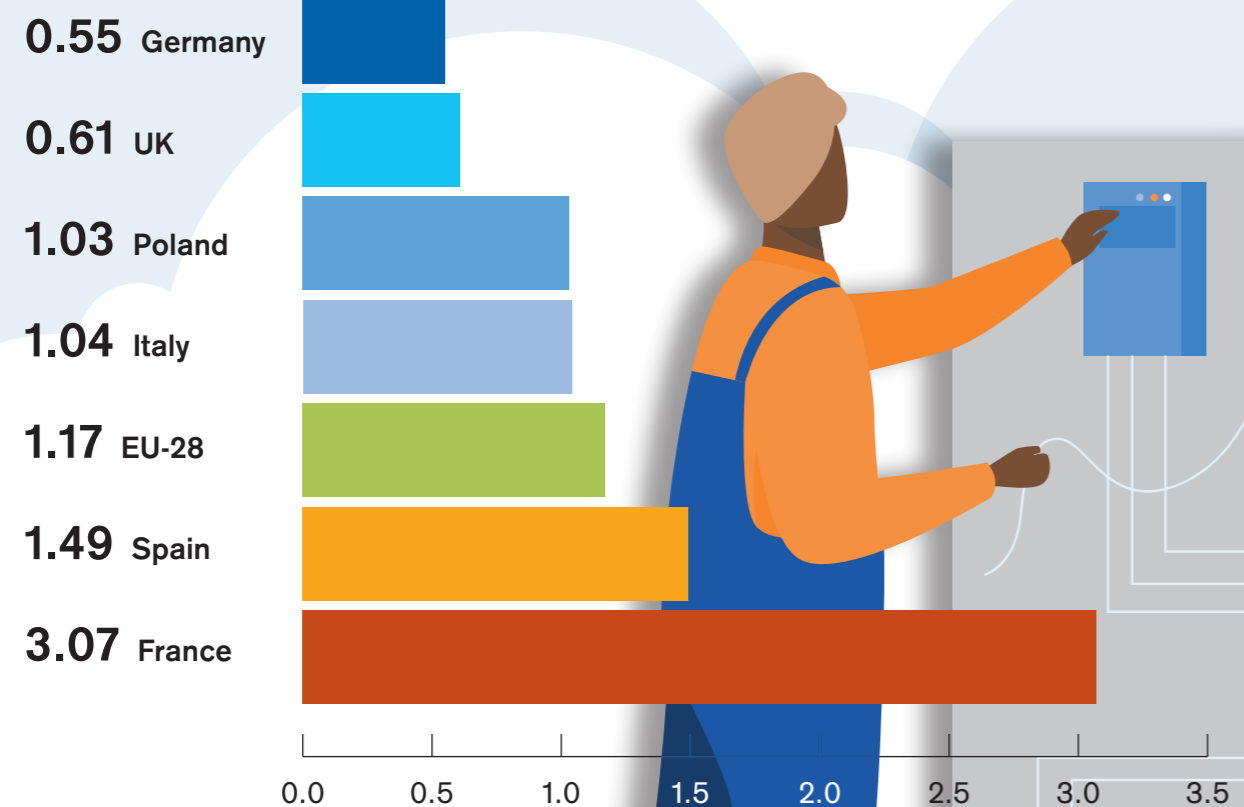


PART 1

SAFETY IN THE UK WORKPLACE 2022

The Health and Safety Executive (HSE) reveals that the UK ranks second place in terms of workplace safety. Of the major European countries, only Germany has a lower rate of fatal workplace injuries compared to the UK.

Incidence rate per 100,000 employees



The findings of this year's Dräger research show a large increase in people feeling safer in their work now compared to how they felt twelve months previously - 52 percent of people feel safer compared to 37 percent in 2021 - and they also believe that their employers are taking health and safety issues more seriously than ever before.

How safe do you feel at work compared to a year ago?

	Total number of participants	Oil & Gas	New energy /renewables	MCEI*	Utilities	Other
Safer	52%	53%	61%	49%	53%	48%
Less safe	16%	20%	19%	12%	16%	13%
No change	32%	28%	20%	39%	30%	39%

* Manufacturing, Construction, Engineering, Industrial

The two youngest demographics surveyed (18 to 24 year olds and 25-34 year olds) feel the safest - more than 60 percent say that they feel protected from accidents - compared to just 33 percent of over 55s.

This appears to be partly down to businesses giving safety more attention. Across all industries and all job statuses, 77 percent think that workplace safety is more important to their employers than it was a year ago. This is a positive sign, and encouragingly it is led by managers, 83 percent of whom believe they are taking the issues more seriously.

The reasons for people feeling safer may be a result of increased awareness or the introduction of COVID-19 protocols.

CLOUDS ON THE HORIZON: THE WORKPLACE SAFETY THREATS THAT EXIST IN 2022

- **Supply chain issues:** While cost-cutting was the largest concern for 41 percent of respondents, another stark finding of the research in 2022 was a third (33 percent) of business leaders are concerned about the impact on health and safety as a result of the global supply chain problems.

Furthermore supply chain issues are not set to get better anytime soon.

The delay in vital products across a variety of sectors, because of supply chain problems, includes key safety equipment, and as such is seen as a major threat to UK workplace safety - with no resolution in sight.

In the safety arena, this causes major problems - for example sensors being unavailable for gas detectors, or the required safety mask being unavailable at short notice.

41%

Four in ten (41 percent) of leaders and managers stated that supply chain problems were the most significant current threat to workplace safety in the UK.

COMMENT

Given that supply chain issues mean that the delivery of new safety equipment continues to be challenging, at least in the short-term, the importance of maintaining, calibrating, servicing, and testing existing safety equipment is becoming more critical than ever before.

Looking after, and in some cases extending the safe lifespan of safety equipment is a pragmatic and effective way to ensure the continued safe operations of a business.

Regular manufacturer servicing is even more crucial when it comes to operationally essential safety equipment, and by looking after such equipment, a business is – of course – looking after both its employees and company assets. Effective safety equipment means the difference between feeling safe, versus actually being safe.

David Head

Marketing Manager, Safety Strategy, Fire & Gas Detection Systems, Draeger Safety UK

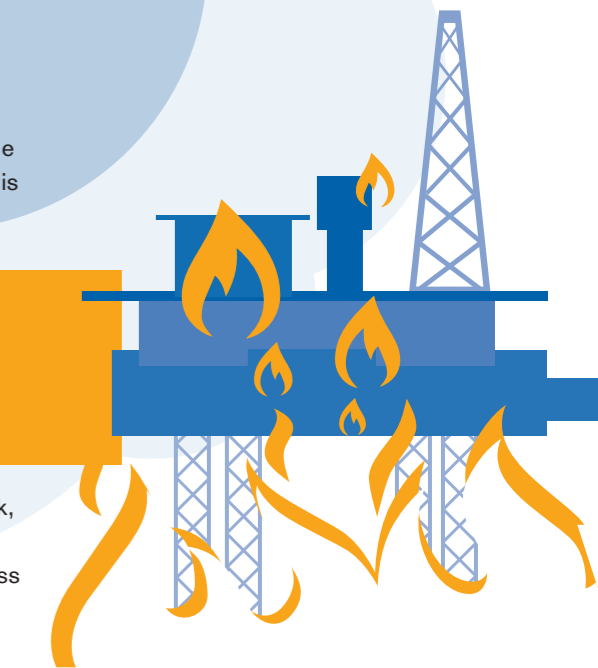
- **Concerns of a major safety disaster:** Ominously, the data revealed significant concerns about a major incident – on the scale of the Piper Alpha or Buncefield disasters – with 55 percent of managers believing the possibility of a major incident was a real worry over the next five years. This was down from 61 percent in 2021 but remains a significant figure.

Overall 41 percent of respondents, whether employees or managers, are concerned about a major incident occurring in their workplace.

One theory about why, even though a majority of people feel safer at work, so many worry about a major incident, could be down to the increase of hybrid and home working. As there are less people onsite, they will be less concerned about their own safety.

- **Loss of experienced staff:** A recent report from McKinsey (SOURCE: <https://www.mckinsey.com/uk/our-insights/the-mckinsey-uk-blog/more-uk-employees-are-leaving-their-jobs-than-ever-how-businesses-can-respond>) found that job-to-job flows reached an all-time high in late 2021, and amidst these high levels of employee churn, compared to last year's Dräger Safety at Work report, concern about the health and safety impact of older, experienced staff leaving the workplace have risen considerably.

In 2021, 24 percent of managers thought a younger workforce posed a significant health and safety challenge. This year, the figure had increased significantly with 39 percent saying that they felt a reduction in older employees posed a problem to health and safety.



39%

OF MANAGERS

WORRIED
ABOUT
LOSING
OLDER
EMPLOYEES



37%

WANT
EXPERIENCE
HANDLED DOWN
TO THE NEXT
GENERATION
OF WORKERS



This loss of experience could lead to shortcuts or mistakes being made but could be rectified by more regular high-quality training.

32 percent of all respondents of the 2022 study said they were concerned that older workers leaving took decades of safety experience with them. And 37 percent say that there needs to be more effort made to make sure that experience is handed down to the next generation of workers.

THE PERFECT STORM?



Supply chain issues, concern of a workplace disaster, and knowledgeable people leaving industries could lead to a perfect storm when it comes to health and safety in the future.

16%

FEEL
LESS SAFE

- 16 percent feel less safe, rising to one in five of people working in oil and gas.
- Women (17 percent) are more likely to feel less safe than men (14 percent).

It must not be overlooked that a significant minority of employees and managers feel they have become more endangered over the last twelve months.



COVID-19 – A LASTING LEGACY FOR SAFETY?

Perhaps counter-intuitively, one of the reasons why people may feel safer appears to be because of COVID-19. The data shows that half of those polled think that COVID-19 has improved the safety culture in their company.

54 percent think that new training practices, which were initially started to help stop the spread of COVID-19 has helped focus their safety routines more keenly: this rises in the energy sector to 61 percent of oil and gas employees and 59 percent of renewables workers.

COVID-19 has meant a greater level of cleaning (52 percent), more interest in employee well-being and mental health (50 percent).

The safety protocols which people have faced in their day-to-day lives during the pandemic may have also led to a change in attitudes to responsibility for safety. It is likely that as a result of this, many employees feel that they must take responsibility for their own health and safety, and data on compliance on drug testing (see below) backs this theory up.

Which of the following measures has your organisation implemented as a result of COVID-19?

	Total number of respondents	Oil & Gas	New energy /renewables	MCEI*	Utilities	Other
	1203	203	200	260	220	320
There is a greater general focus on investment in staff safety and well-being	50%	44%	52%	47%	53%	52%
There has been less focus on and investment in safety as attention and resources are diverted elsewhere	19%	27%	26%	17%	17%	12%
There is more red tape/regulations	29%	31%	36%	28%	25%	28%
There is less red tape/regulations	8%	11%	14%	7%	7%	5%
There is a greater focus on cleaning/disinfection	52%	43%	48%	47%	55%	62%
Hybrid working/working from home safety guidelines have been introduced	39%	35%	47%	30%	46%	37%
The HSE guidance to monitor workspaces for adequate ventilation (e.g. CO2 monitor) has been introduced	17%	16%	20%	19%	18%	15%

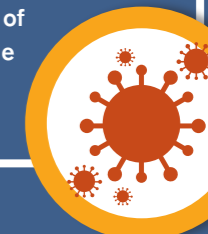
* Manufacturing, Construction, Engineering, Industrial

COMMENT

Significant events and incidents are often a catalyst for change with COVID-19 being a prime example of this. Key changes we have seen are a reduction in presenteeism with people not feeling the need to be in work, or “soldiering on”, when they have a cold or “the sniffles”, perhaps due to a new focus on hygiene and greater support for remote working. People have seen safety become an enabler, not a disabler, allowing work to continue safely throughout the pandemic.

Once seen as the sole preserve of the Safety Advisor or Manager, the impact of COVID-19 has seen people taking on a much greater personal responsibility for their own and others health and safety. This is demonstrated through active choices such as choosing to wear a face covering when suffering from a cold, working remotely or taking time off when not feeling well and becoming more confident to challenge unsafe practices. In many workplaces there is now also a greater emphasis on well-being and people are more likely to tell others if they think what they are doing could endanger others. It is still early days but it is likely that this new found confidence in challenging unsafe behaviours and practices will be transposed into other areas of the working environment - with people feeling more confident to challenge someone who is not wearing PPE or working in an unsafe manner.

Keith Hole - Director and Thought Leader at The Safety Man UK, TSM.UK



PART 2

SAFETY IN THE UK'S RENEWABLE ENERGY SECTOR

The UK's renewable energy sector is one of the newest and fastest growing sectors. For example, a recent report by Statista (<https://www.statista.com/statistics/274057/renewable-energy-consumption-in-the-united-kingdom/>) showed renewable energy use growing by 2900 percent between 1998 and 2020 and expected to grow a further 10 percent more before 2024. A detailed exploration of the attitudes towards the renewable energy workforce when it comes to health and safety was explored in Dräger's 2022 research to build on initial findings in this area from 2021.

THE ISSUE OF SAFETY IN THE RENEWABLE ENERGY SECTOR IS NOT A NEW ONE. IN FACT, IN A REPORT BY TRADE UNION PROSPECT (<https://prospect.org.uk/>), IT WAS STATED THAT IN 2020 THE RATE OF LOST TIME TO INJURIES IN OFFSHORE RENEWABLES WAS **FOUR TIMES AS HIGH AS IN OFFSHORE OIL AND GAS - ITSELF A HIGH HAZARD INDUSTRY.**

In 2019, offshore wind's rate of total "recordable incidents" was 4.55 per million hours worked, compared to 0.9 per million in oil & gas.

However, it appears that as it grows, the industry is recognising the fundamental importance of safety in this workplace. 82 percent of the UK's new and renewable energy sector workforce think safety is more important than last year. This splits out to 87 percent of 18 to 24 year olds and 85 percent of under 35s. However, only 25 percent of over 55s agree, suggesting that their longer years in the industry may mean extra cynicism towards employer promises.

Indeed, 61 percent feel safer than they did last year, nearly ten percentage points ahead of all other industries polled.

68 percent say this is because the culture has changed and the business is taking safety more seriously. However, training and equipment can also add to the feeling of security - 36 percent say that training has improved. 34 percent say that better equipment has made them feel safer.

COMMENT

The incipient hydrogen economy is an excellent example of how the growth of renewable technologies requires rapid responses to tackle new and urgent safety challenges. Hydrogen has very high energy density and potentially net-zero carbon footprint when used as a fuel, and will play a central role in decarbonising industrial and domestic sectors as a green energy vector and feedstock. In 2022, the UK Government's British Energy Security Strategy updated the ambition to produce 10GW of low carbon hydrogen by 2030 to cover an internal demand that could reach 500 TWh (terawatt-hours) per year by 2050. This upscale requires consideration of several safety aspects across the whole supply chain, including hydrogen's low energy ignition, flammability, and diffusion across engineering materials.

Safety aspects are critical for operators handling hydrogen equipment for storage and transportation, and require a collaborative formative effort from both industry and academia. As in other renewable sectors, the hydrogen economy is attracting young employees working in an unknown territory when it comes to regulation, long-term references and case studies. That is why establishing safety standards that are recognised worldwide is essential to consolidate the energy transition. Specific formation, the development of detection and remediation technologies, and transparent communication to the public audience will help establish a successful and safe hydrogen economy.

Dr Alfonso Martinez-Felipe

Senior Lecturer in Chemical Engineering, University of Aberdeen and member of the Board of Directors of Aberdeen Renewable Energy Group (AREG)

However, both employees and managers in the industry agree that safety is hindered by the reduced number of older and more experienced staff. 50 percent of those surveyed said the loss of the older generation and their safety experience made them feel less safe.

50%

PART 3

57%
OF THE YOUNGER
GENERATION

Global instability and cost-cutting measures (40 percent) are other reasons why renewable sector workers believe safety may be compromised. It seems that this concerns the youth more, with 57 percent of the youngest cohort worried about global matters - just over 30 percent of over 34s.

When it comes to equipment, renewable workers believe that there could be more done when it comes to the quality and standards of safety equipment in the industry, with 59 percent saying that there is more their companies could do when it comes to the hiring or purchase of vital safety kit.

60%
MORE NEEDED FOR
SAFETY KIT

63%
SAY BETTER
SAFETY TRAINING
NEEDED

63 percent of those who work in renewables say that there could be better safety training provided to staff and 16 percent say that their training is adequate or limited.

More than half (51 percent) of those in the renewables sector are concerned or very concerned about a major disaster.

51%
VERY CONCERNED
ABOUT MAJOR
DISASTER

38%
WANT MORE
TRAINING

According to the renewable sector workers surveyed by Dräger, more training (38 percent) is the key factor in preventing a major health and safety incident, followed by better equipment (24 percent) - while 36 percent say both are equally important.

THE IMPORTANCE OF WORKPLACE CULTURE WHEN IT COMES TO SAFETY

Poor worker mental health is a real – and now well-recognised – problem in the UK. The charity the ‘Mental Health Foundation’ (<https://www.mentalhealth.org.uk/explore-mental-health/mental-health-statistics/mental-health-work-statistics>) reports that 13 percent of all sickness absence days in the UK can be attributed to mental health conditions.

And poor worker mental health is bad for business. A report by Deloitte published in April 2022 reveals that poor mental health costs UK employers up to £56 billion a year.

Source: <https://www2.deloitte.com/uk/en/pages/press-releases/articles/poor-mental-health-costs-uk-employers-up-to-pound-56-billion-a-year.html>

OUR RESEARCH REVEALED SIGNIFICANT ISSUES WHEN IT COMES TO MENTAL HEALTH AND WORK, WITH 77 PERCENT OF EMPLOYEES HAVING ENDURED STRESS AND ANXIETY IN THE WORKPLACE - AND 27 PERCENT HAVING DONE SO ON MANY OCCASIONS.

Yet shockingly only 40 percent of managers believed that treating mental health equally to physical health was important for safety. There exists a real disparity here between managers and employees, with 56 percent of employees believing that this should be the case, suggesting that managers have some work to do on this issue. Mental health can have tragic and fatal consequences if not seen or handled in the same way as physical health.

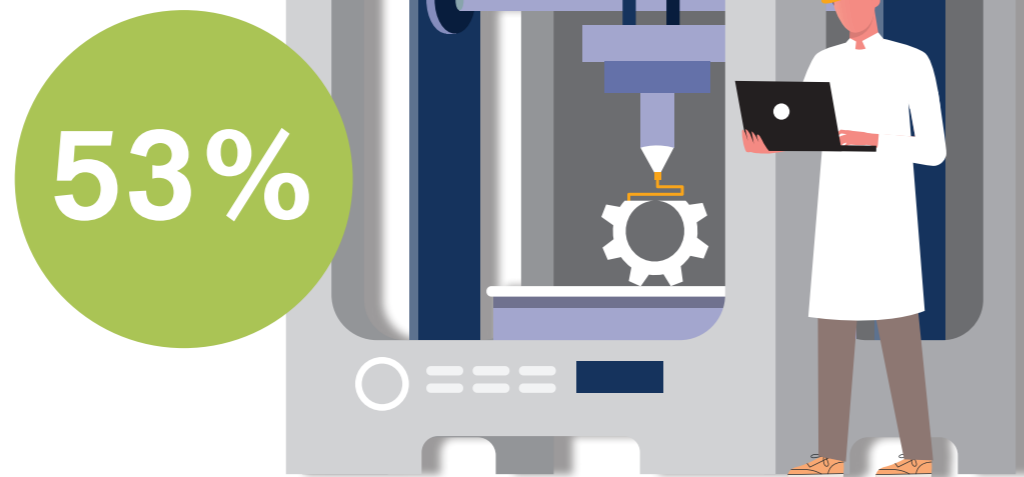
In addition, the younger generation feel less supported than older respondents, with nearly a third (32 percent) of 18-24 year olds claiming that “My workplace doesn’t take mental health as seriously as physical health” whereas in over 55s this drops to 16 percent. This view was particularly prevalent amongst oil and gas workers (33 percent) and those in renewables (30 percent) compared to the utilities (18 percent) industries.



The study also found that openness, awareness of mental health, safety training and an investment in more safety equipment are considered the most important factors in improving workplace safety, with openness being the number one factor in making people feel safe - 56 percent of respondents said that people feeling able to bring up safety fears - be they related to mental or physical health - was the main factor that helped them feel protected.

THE WAY THAT MENTAL HEALTH IS MANAGED IN THE WORKPLACE WAS THE SECOND MOST IMPORTANT FACTOR IN MAKING PEOPLE FEEL SAFE, WITH 53 PERCENT OF RESPONDENTS BELIEVING IT SHOULD BE AS MUCH OF A FOCUS AS PHYSICAL HEALTH FOR EMPLOYERS.

It could be seen that the 'mental health gap' currently exists between managers and employees will lead workers to turn to favour sectors where it is given as much priority as physical health - therefore having the long-term effect of forcing manufacturing and construction to level up their mental health offering for staff.



Which of the following do you agree with when it comes to perceptions of mental health in the workplace?

	Total number of respondents	Oil & Gas	New energy /renewables	MCEI*	Utilities	Other
	1203	203	200	260	220	320
My workplace doesn't take mental health as seriously as physical health	26%	33%	30%	27%	18%	24%
My workplace puts mental health and physical health in the same remit	59%	56%	62%	56%	67%	57%
My organisation needs to acknowledge that mental health is as important as physical health	22%	26%	23%	20%	20%	23%

* Manufacturing, Construction, Engineering, Industrial

DRUG AND ALCOHOL TESTING

Overall, workers are overwhelmingly (and perhaps surprisingly) compliant when it comes to the idea of being tested by their employers for drugs or alcohol: 83 percent of workers would comply with a corporate testing policy as they believe it is in everyone's interest to be safe at work.

Perhaps an even stronger indication of how deep this compliance is comes from the fact that 70 percent of home working respondents would submit to testing when working remotely from their own home.

However, this is not to say that UK workers like the thought of being tested - 31 percent are not in favour of being drug tested by their employer, with 44 percent of 18 to 24 year olds saying that it is an invasion of privacy, compared to 36 percent of the overall group. It's probable that younger groups as digital natives are more aware of the possible uses of their data.

While 53 percent of respondents believe that dangerous machinery operators should be tested but not office workers.

So resistance may be there in principle, but in practice the overwhelming majority of UK workers would agree to be tested for drugs and alcohol by their employer in the interest of everyone feeling safe at work.

This could be due to an increased awareness of drug and alcohol misuse - a 2021 survey from Action on Addiction found that 64 percent of Brits know an addict - up 4 percent from 2019.

(www.actiononaddiction.org.uk/yougov-poll-on-attitudes-toward-addiction)

83%

OF WORKERS
WOULD COMPLY WITH
CORPORATE TESTING

COMMENT

It is good to see evidence that employers are taking health and safety issues more seriously and that there is a change in attitude to personal responsibility for safety. Drug and alcohol misuse poses a challenge to businesses and their ability to effectively manage talent and create sustainable value chains. Implementing a testing regime within an overall policy puts people at the heart of the conversation - quite simply drugs, alcohol and safety critical tasks such as driving do not mix.

Dr Karen McDonnell

Occupational Health and Policy Adviser, Royal Society for the Prevention of Accidents (RoSPA)

ACCOUNTABILITY

OVERALL THERE IS AN ALMOST EXACT 50/50 SPLIT WHEN IT COMES TO WHERE PEOPLE THINK RESPONSIBILITY LIES FOR SAFETY IN THE WORKPLACE.

Just under half (49 percent) of respondents believe that responsibility for safety resides with employers, with just over half (51 percent) stating that this responsibility resides with employees.

This is a small shift in balance from last year's findings, which found that 54 percent of responsibility for safety rested with the employer, not employee.

A reason for this shift might be the rise in remote working and also the accountability that individuals were given when it came to keeping themselves and others safe earlier in the pandemic.

Interestingly, young people were more likely to feel that workers were responsible for their own safety with 56 percent of 18-24 year olds saying they should be in charge compared to 47 percent of over 55s.

Thinking about the responsibility for the safety of employees at work, what percentage of responsibility do you see residing with employers and what percentage with employees?

	Total number of respondents	Oil & Gas	New energy /renewables	MCEI*	Utilities	Other
	1203	203	200	260	220	320
Employer	49.4	46.8	45.8	51.9	49.7	51.1
Employee	50.6	53.2	54.2	48.1	50.3	48.9

* Manufacturing, Construction, Engineering, Industrial



DIGITAL AND CONNECTED SAFETY

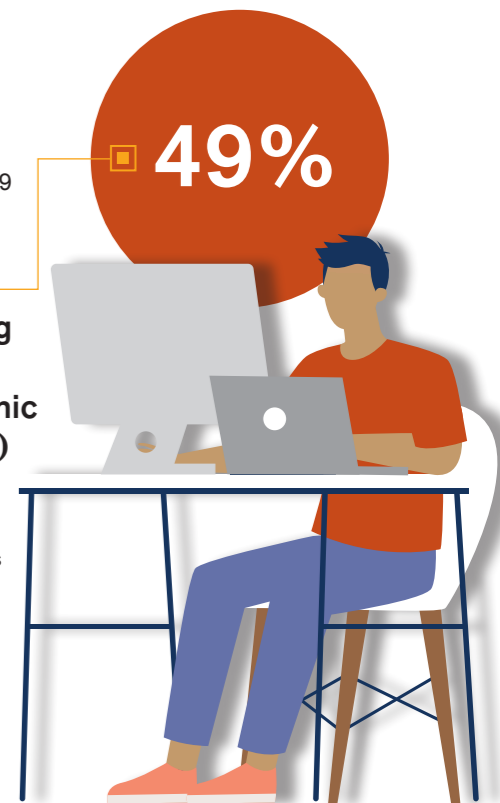
Earlier this year, Draeger Safety UK called for greater adoption of digital and connected safety technologies in light of changes to working styles post-COVID-19 and the research found that workers were in strong support.

Nearly half (49 percent) of respondents found that the use of digital and connected safety technology reassuring when related to workplace safety, and this – perhaps surprisingly – rose to 55 percent of the oldest demographic compared to 47 percent in the younger (18 to 24 year old) age group.

38 percent of those surveyed say that connectivity has already improved outcomes and led to better safety. There is however room here for businesses to convince people that interacting digitally can improve safety matters.

Those working in newer industries such as the renewables sector are more likely to embrace new technology, and feel safer when the latest safety technology is used, with more than half of respondents in this sector (55 percent) expressing this view.

While the feeling overall is that the introduction of new technology is largely positive, the fact that just over a fifth (22 percent) of people expressed privacy concerns and the same number believe that there is an increased risk of cybercrime, must not be ignored.



COMMENT

The support for remote working has perhaps brought about the greatest change, with the safety and supervision of staff being undertaken less through face-to-face interaction and more through management information and performance indicators collected using internet connected devices. Improvements in the way that data is collected and processed enables businesses to have a clearer understanding of the challenges their workforce faces on the ground and therefore managers are able to provide supervision remotely through the adoption of new technologies - making businesses more agile, risk-based decision making, and, most importantly, to keep everybody safe at work. Historically, this level of information has been reserved for the c-suite but with recent changes we have seen this being shared more widely throughout the business, ensuring transparency around the data collected and enabling staff to have a greater ownership of their own safety information.

Keith Hole

Director and Thought Leader at The Safety Man UK, TSM.UK

CONCLUSION

The world of work appears to be becoming gradually safer. Whether it is down to better technology, or a sharper focus on safety protocols due to the raised awareness of this area brought about by COVID-19, a majority of people feel safer at work this year than they did last.

However, there is clearly work to be done when it comes to safety at work in the UK. Gathering issues over supply chains, a lack of experienced workers and fears of a major disaster are concerning.

Building from our 2021 report's exploration of the UK's renewable energy sector, this year's research continues to shine a light on the new energy and renewables sector, in which there remain safety challenges.

Companies must continue to remain open and act upon issues such as mental health, or they may find that the market decides for them and they will not be able to find employees.

It makes sense for different industries across all sectors to continue to strive to keep their workers safe.

METHODOLOGY

Overall, 1203 online quantitative interviews were undertaken, of which 253 were with managers.

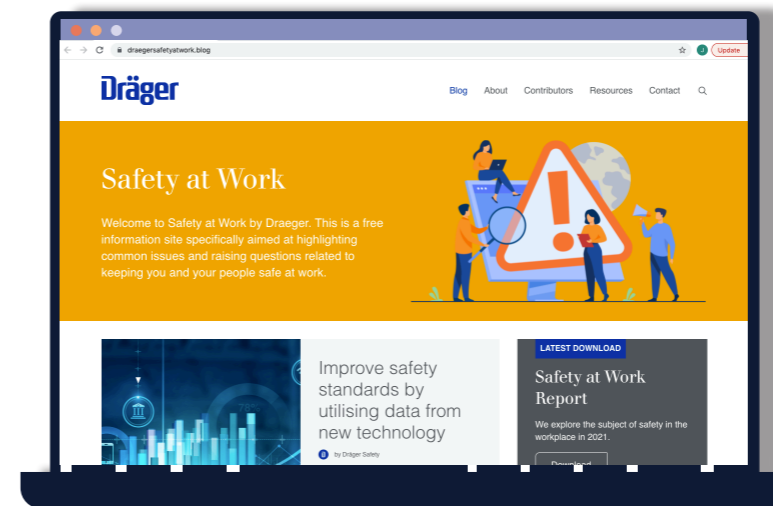
1203
INTERVIEWS

253
MANAGERS

Sectors interviewed:
Construction
Engineering
Gas
Industrial
Manufacturing
New Energy
Oil
Other
Renewables
Utilities

THE SAFETY AT WORK BLOG BY DRÄGER

This is a free information site specifically aimed at highlighting common issues and raising questions related to keeping you and your people safe at work.



www.draegersafetyatwork.blog

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