

ONS 2026



Transitioning to a Circular Economy Process

Views of ONS 2026 Conference Attendees

August 2026



What we did

- This survey includes 161 registrants and participants of the ONS 2026 conference.
- Fieldwork was conducted from 12 to 24 August, 2026.
- The main objective of this research is to understand how conference attendees/opinion leaders view issues related to the energy industry transitioning to the Circular Economy.
- Comparisons are made in this report to similar surveys conducted with registrants and participants of the ONS 2024 conference (n=200) and the ONS 2022 conference (n=440). Question wording sometimes varies between years and is highlighted where applicable.
- The overall margin of error for the 2026 wave is plus or minus 8 percentage points at the 95% confidence interval. For 2024, it is 7 percentage points, and for 2022, it is 5 percentage points.

N.B. totals may add to more/less than 100% due to rounding

EXECUTIVE SUMMARY (1 of 3)

TOP ISSUES FACING THE INTERNATIONAL COMMUNITY

Participants at ONS 2026 say the top three issues facing the international community today are: Political instability (57%), Energy security (47%), and Climate Change (43%). These have been the top three issues across all three waves of this research (2022, 2024 and 2026).

Concern about disruptions to global trade, logistics and supply chains – a new response option in 2026 – is notably high (35%), making it the fourth most-cited issue. Concern about Sustainable development has fallen back since 2024 (16% now vs 30% in 2024).

FAMILIARITY WITH ISSUES FACING THE SECTOR

Respondents are most likely to say they are very or moderately familiar with the transition to a Net Zero energy industry (71%), similar to 2024 (69%) but still below 2022 (78%). Familiarity with the role of the renewables (66%) and oil and gas (66%) industries in the transition has ticked up slightly since 2024 (65% and 64% respectively). Senior-level respondents are more likely than others to say they are familiar with the transition toward a Circular Economy (77%) and the challenge to attract, develop and retain the next generation of energy industry leaders (65%)

SUPPORT FOR CIRCULAR ECONOMY

More than nine in ten (91%) say they either strongly (67%) or somewhat (24%) support transitioning to a Circular Economy globally – up slightly since 2024 (89%).

Nearly nine in ten (88%) say transitioning to a Circular Economy should be either a top priority (68%) or the top priority (19%) for the energy industry, essentially unchanged since 2024 (87%). Men are more likely than women to say the transition should NOT be a top priority (16% vs 3%).

EXECUTIVE SUMMARY (2 of 3)

INFLUENCE OF DIFFERENT GROUPS IN THE TRANSITION

When asked to pick the top three groups with the most influence to help the energy industry transition toward a Circular Economy, respondents are most likely to say: Government and industry regulators (66%), Investors (43%), and Politicians (37%).

35-49 year-olds are more likely than those 50+ to credit oil and gas industry leaders with influence (37% vs 19%).

NEW IN 2026: COMPANY-LEVEL ACTION ON RESOURCE SECURITY

A new question in 2026 asked respondents whether their company or organisation had taken specific actions in response to resource and supply security concerns. A majority say their company has performed risk assessments in the value chain (57%) and/or changed how they view security of supply (50%); 41% say their company has diversified sourcing across multiple suppliers.

PERSONAL PRIORITIES FOR ENVIRONMENTAL SUSTAINABILITY

When asked to pick their top three priorities related to environmental sustainability, respondents are most likely to pick Reusing and maximizing existing resources and products (57%), consistent with 2024 (55%) and well above 2022 (19%, when only a single top priority could be chosen). Nearly as many say Managing/preventing Climate Change (55%), Ensuring clean water (45%), or Protecting nature's biodiversity (43%).

Women are more likely than men to prioritize biodiversity (58% vs 39%), and entry-level respondents are far more likely than senior-level respondents to do so (67% vs 38%).

EXECUTIVE SUMMARY (3 of 3)

TOP ACTIONS TAKEN PERSONALLY

When asked how often they did a variety of actions related to living in a way that would promote a Circular Economy, respondents are most likely to say they “Always” or “Often” sort their household’s paper, plastic and other non-food waste for recycling (93%), use online tools like Zoom or Teams rather than travel for meetings (82%), or use fabric/paper bags instead of buying plastic bags (72%).

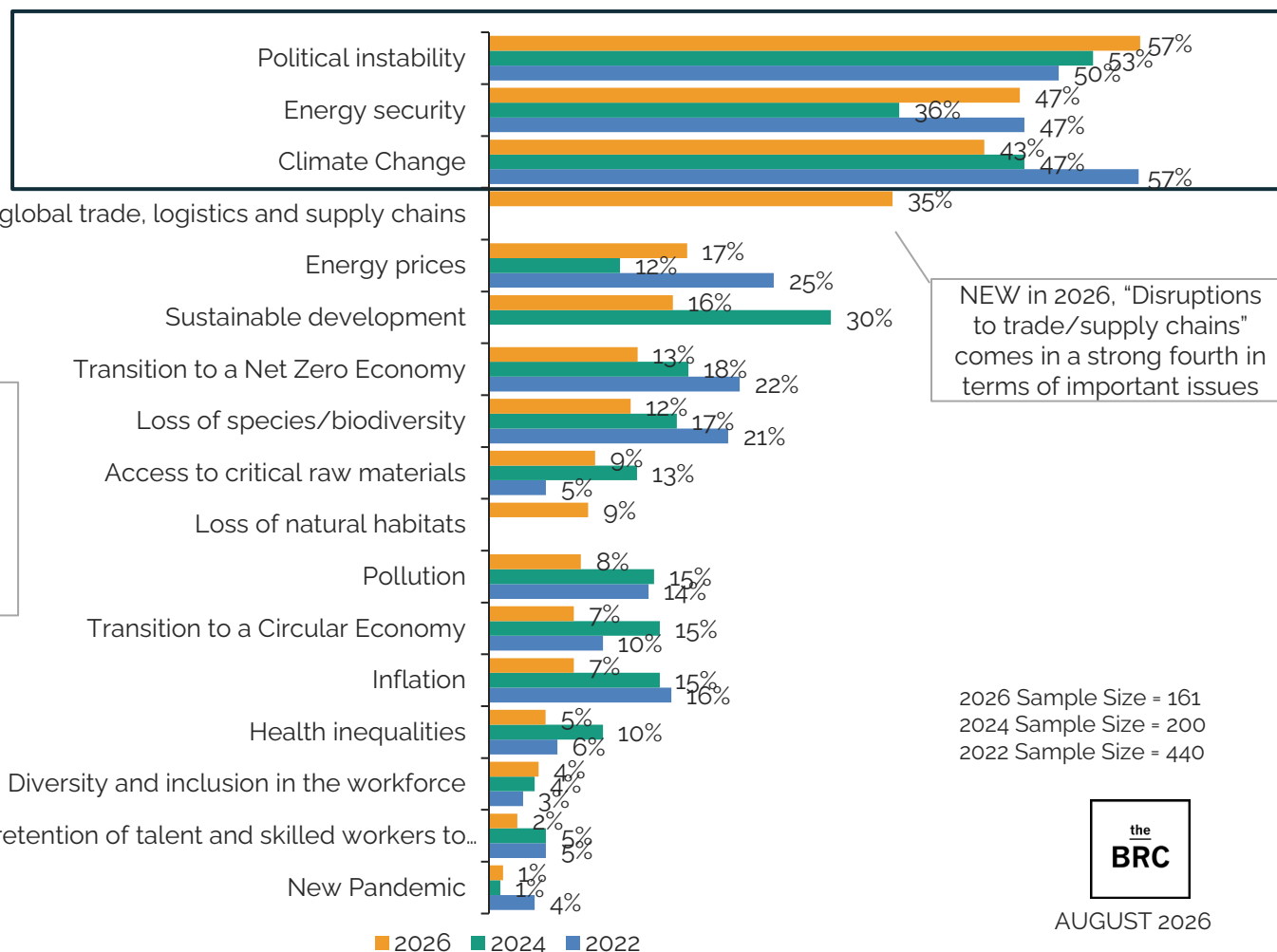
Younger respondents continue to stand out on several less-common behaviours: 18-34 year-olds are far more likely than those 50+ to travel by train/bus rather than fly (44% vs 5%), buy second-hand (67% vs 24%), or eat a vegan diet (23% vs 6%).

A new action was added in 2026: half of respondents (52%) say they “Always” or “Often” make a conscious decision not to buy something they otherwise would have bought – already one of the more common behaviours measured, on par with composting food waste (51%).

Respondents pick Political instability, Energy Security and Climate Change as the top three issues facing the international community

Firstly, please pick what you consider to be the top three themes or issues facing the international community today. (please pick up to three)

Same top three issues across 2022, 2024 and 2026



- Those aged 50+ are more likely than those 35-49 to say Energy security is a top issue (55% vs 35%)
- Entry-level respondents are more likely than senior-level respondents to say Energy prices are a top issue (33% vs 11%)

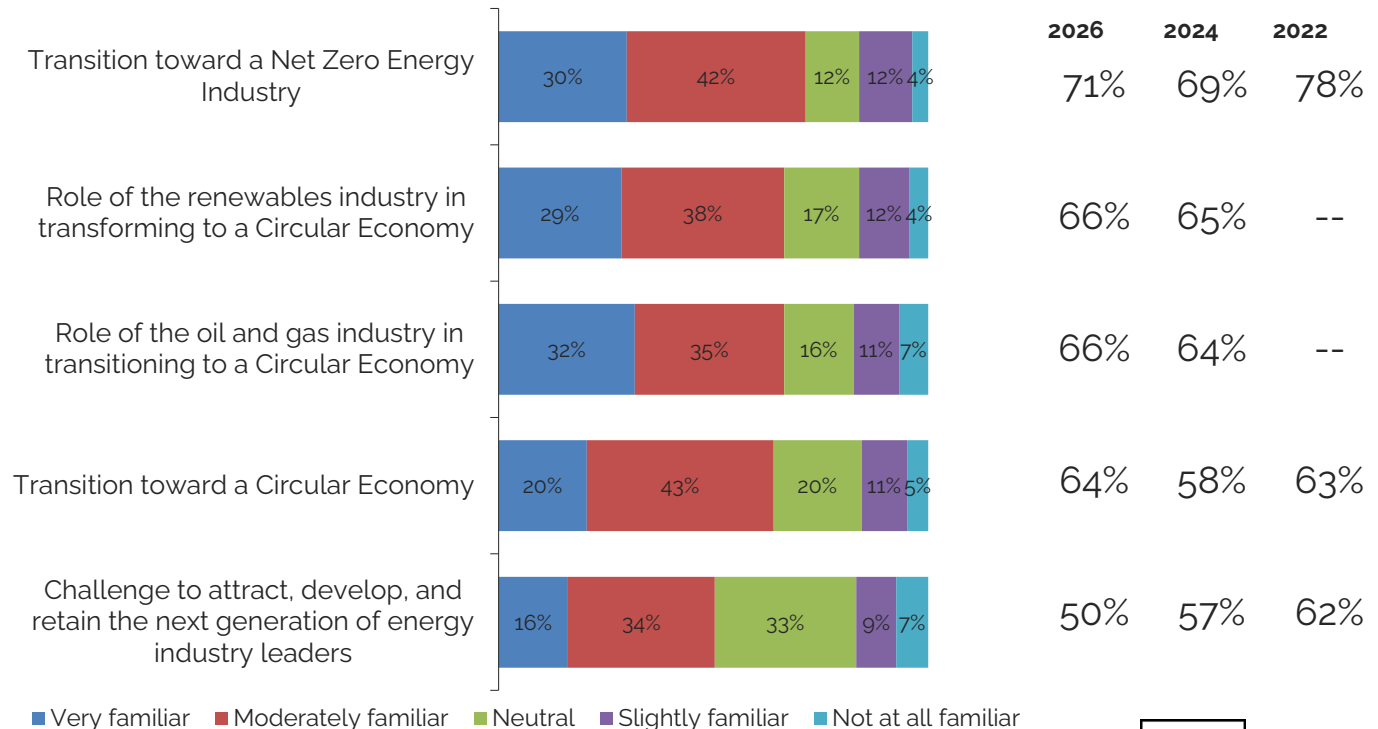
Respondents are most likely to say they are familiar with the transition toward a Net Zero Energy Industry (71%)

Nearly as many say they are familiar with the role of the renewables (66%) and the oil and gas (66%) industries in moving to a Circular Economy.

How familiar are you with each of following issues or ideas related to the energy industry?

TOTAL: Very or Moderately Familiar

- Senior-level respondents are more likely than others to say they are familiar with the transition toward a Circular Economy (77%) and the challenge to attract, develop and retain the next generation of energy industry leaders (65%)
- Those aged 18-34 are more likely than others to say they are slightly or not at all familiar with the transition toward a Circular Economy (30%)



2026 Sample Size = 161
2024 Sample Size = 200
2022 Sample Size = 440



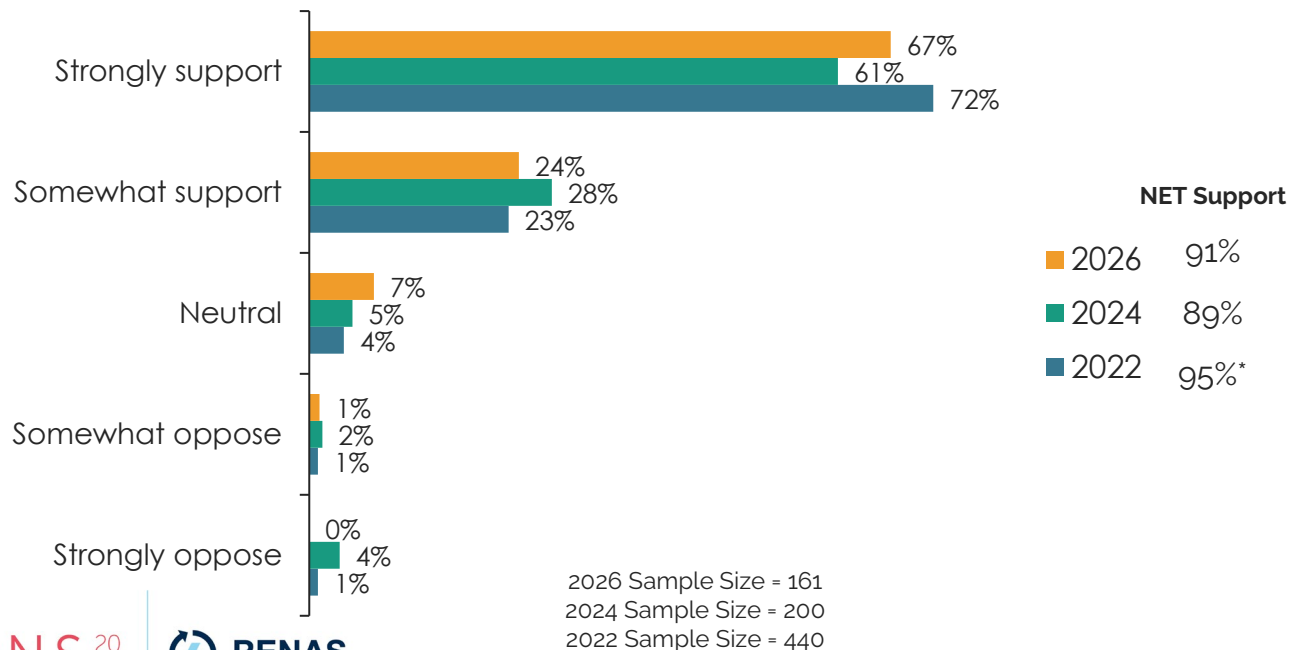
AUGUST 2026

More than nine in ten (91%) respondents say they support transitioning towards a Circular Economy globally (67% "Strongly" support)

Circular Economy means materials and resources are effectively used to their highest utility and value for as long as possible.

Sectors are encouraged to develop circular economy models, consisting of closed-loop cycles that minimize or eliminate waste, and where resources, including carbon, are continually reused. The result is to preserve nature, resources, and the environment, as well as to create a more sustainable economy.

Do you support or oppose transitioning to a Circular Economy globally?

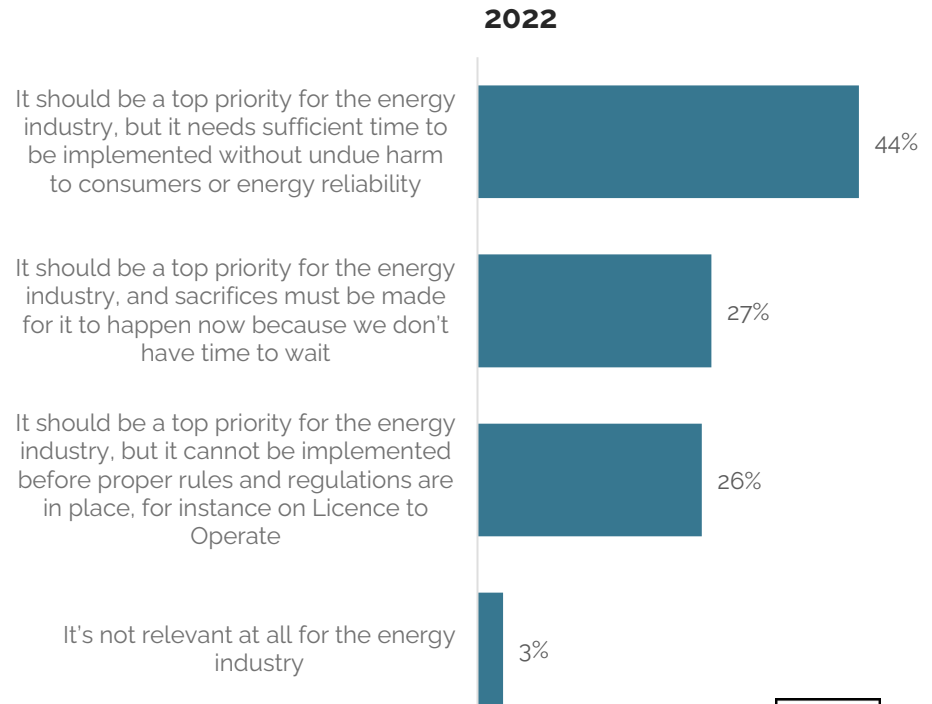
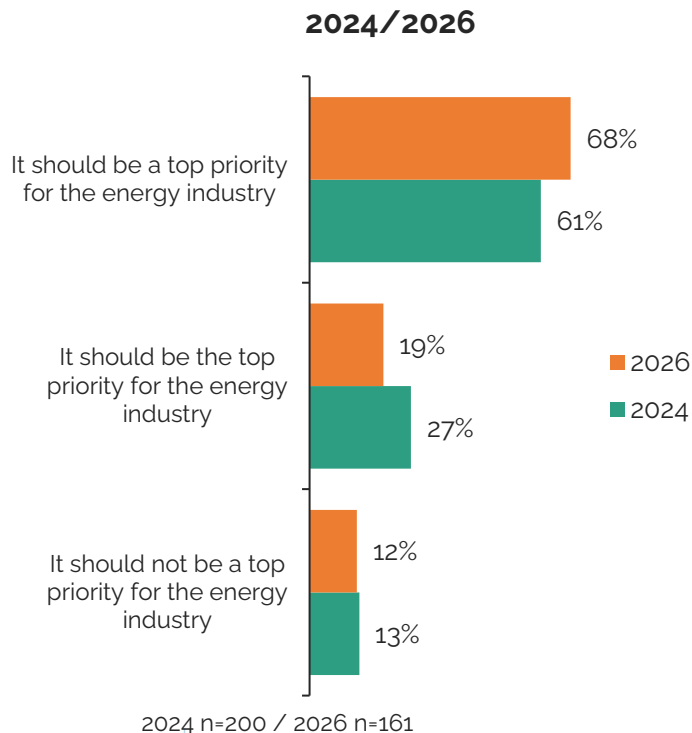


• Those 50+ are more likely than 18-34s to support the transition (94% vs 81%)

Close to nine in ten (88%) of respondents say transitioning toward a Circular Economy should be a top priority (68%) or the top priority (19%) for the energy industry – similar to 2024 (87%)

Thinking now of just the energy industry:
Which of the following views is closest to
your own about the energy industry
transitioning toward a Circular Economy?

(Asked differently in 2022) Which of the following
views is closest to your own about the energy
industry transitioning toward a Circular Economy?

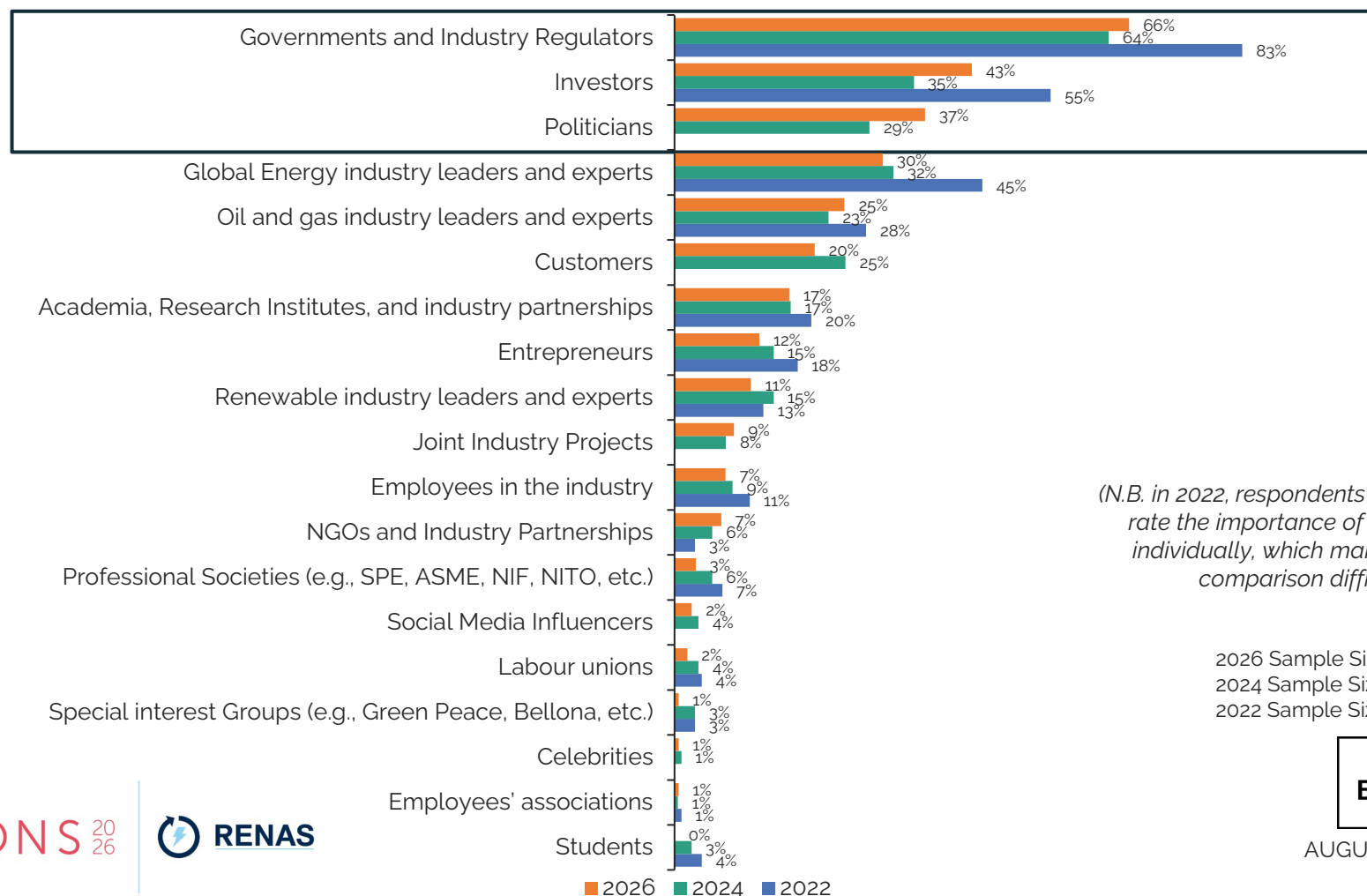


Sample Size = 440

- Men are more likely than women to say the transition should NOT be a top priority for the energy industry (16% vs 3%)

Respondents say Government, Investors, and Politicians have the most influence to help the energy industry transition

Which three of the following groups could have the most influence to help the energy industry transition toward a Circular Economy ? (please select up to three)



(N.B. in 2022, respondents were asked to rate the importance of each group individually, which makes a direct comparison difficult.)

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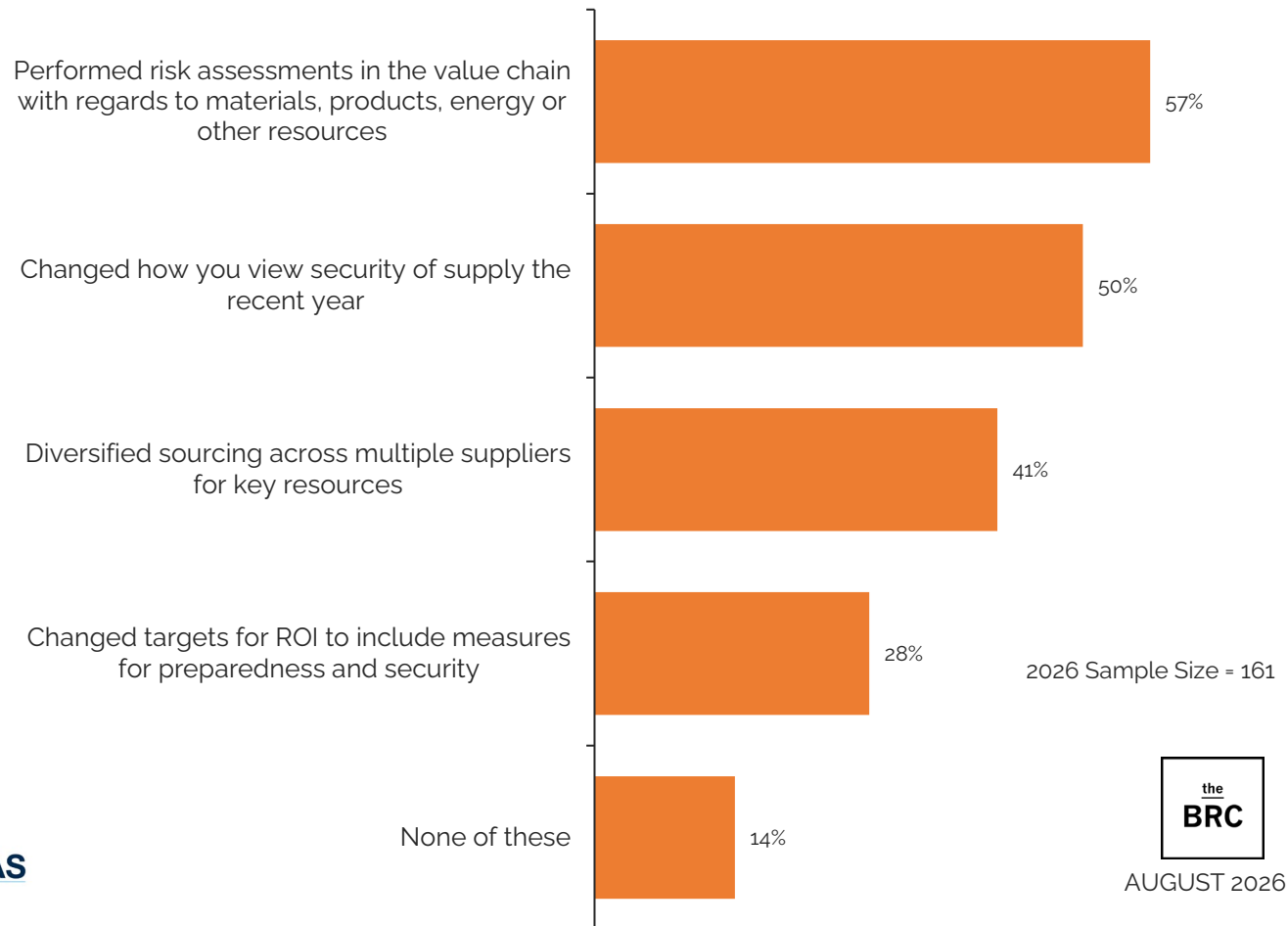


AUGUST 2026

Respondents are most likely to say their company has performed risk assessments (57%) and changed how they view security of supply (50%)

Thinking about your company or the organisation you represent, which of the following changes or actions apply? (Tick all that apply)

- Large companies (1,000+ employees) are far more likely than SMEs (<250 employees) to have performed risk assessments in the value chain (70% vs 52%)
- Large companies (1,000+ employees) are more than twice as likely as SMEs (<250 employees) to have changed ROI targets to include preparedness/security measures (42% vs 17%)



Respondents are most likely to say that, of several priorities, reusing/maximising resources is their highest priority personally (57%), followed by managing/preventing climate change

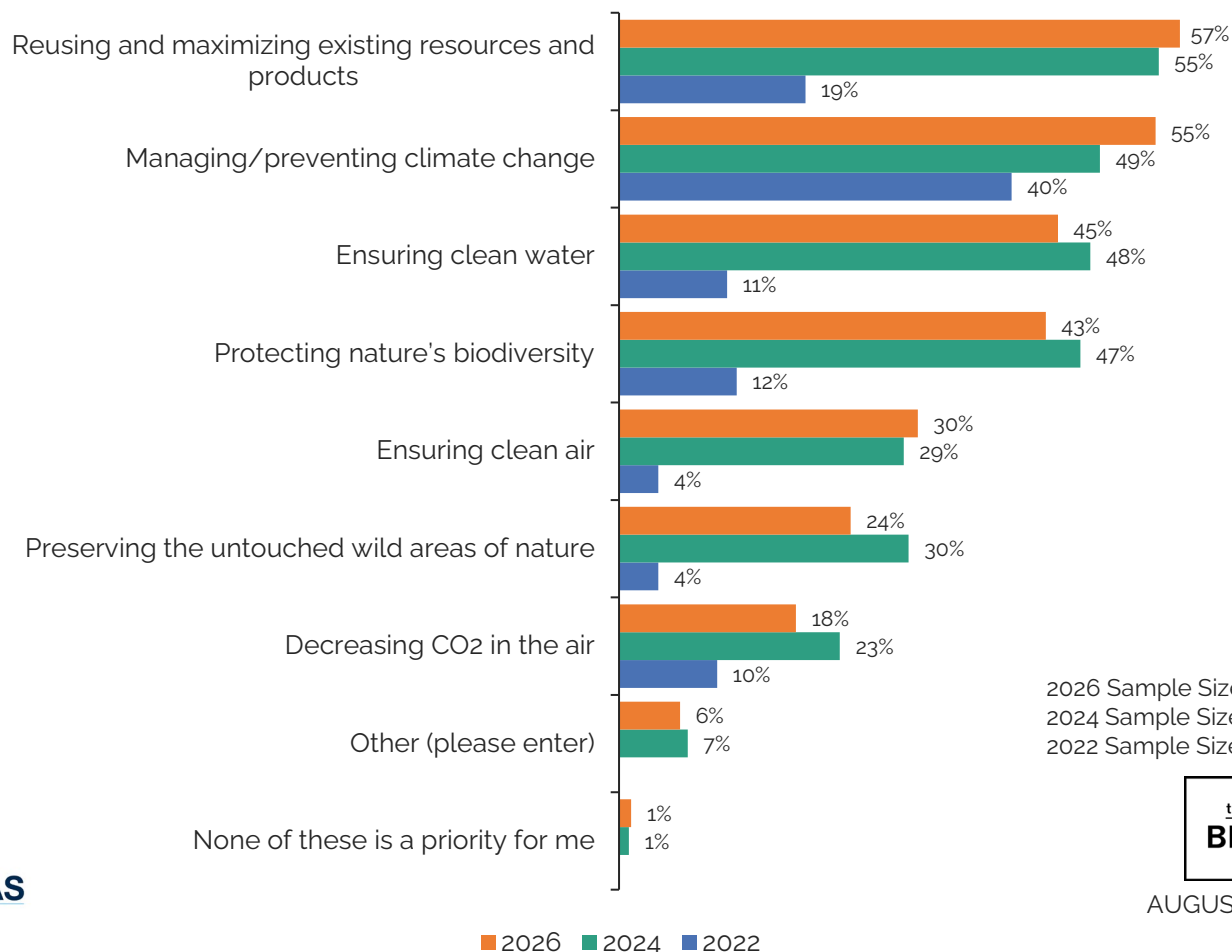
Which three of the following is the highest priority to you personally?
(Select up to three)

(N.B. in 2022, respondents only had the option to pick their single top priority)

- Women are more likely than men to say protecting nature's biodiversity is a top priority for them (58% vs 39%)

- Men are more likely than women to say ensuring clean air is a top priority for them (34% vs 17%)

- Entry-level respondents are much more likely than senior-level respondents to prioritize protecting nature's biodiversity (67% vs 38%)



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AUGUST 2026

Top personal actions to protect the environment include: recycling, using online tools to avoid travel, and using fabric/paper bags

Respondents are more likely than in 2024 to say they would:

- Drive an EV (+12 pts)

Respondents are less likely than in 2024 to say they would:

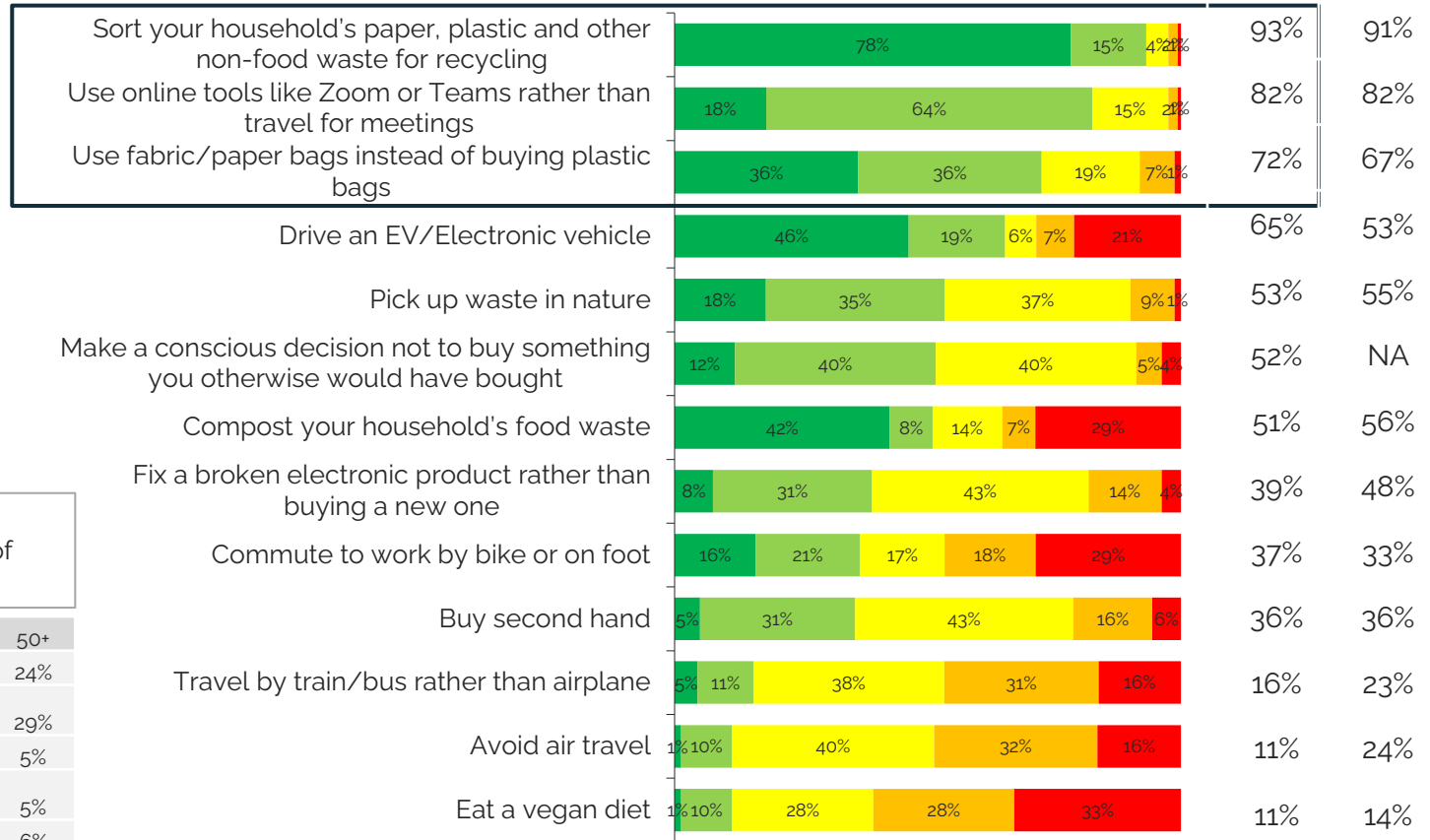
- Avoid air travel (-13 pts)
- Fix a broken electronic product rather than buy a new one (-9 pts)
- Travel by train/bus rather than plane (-7 pts)

Young people (18-34) are especially likely to do many of these actions

(Always or Often)	18 to 34	35-49	50+
Buy second hand	67%	39%	24%
Commute to work by bike or on foot	46%	43%	29%
Avoid air travel	12%	22%	5%
Travel by train/bus rather than airplane	44%	16%	5%
Eat a vegan diet	23%	15%	6%

How often do you do each of the following in your own life?

TOTAL: Always or Often



■ Always ■ Often ■ Sometimes ■ Rarely ■ Never

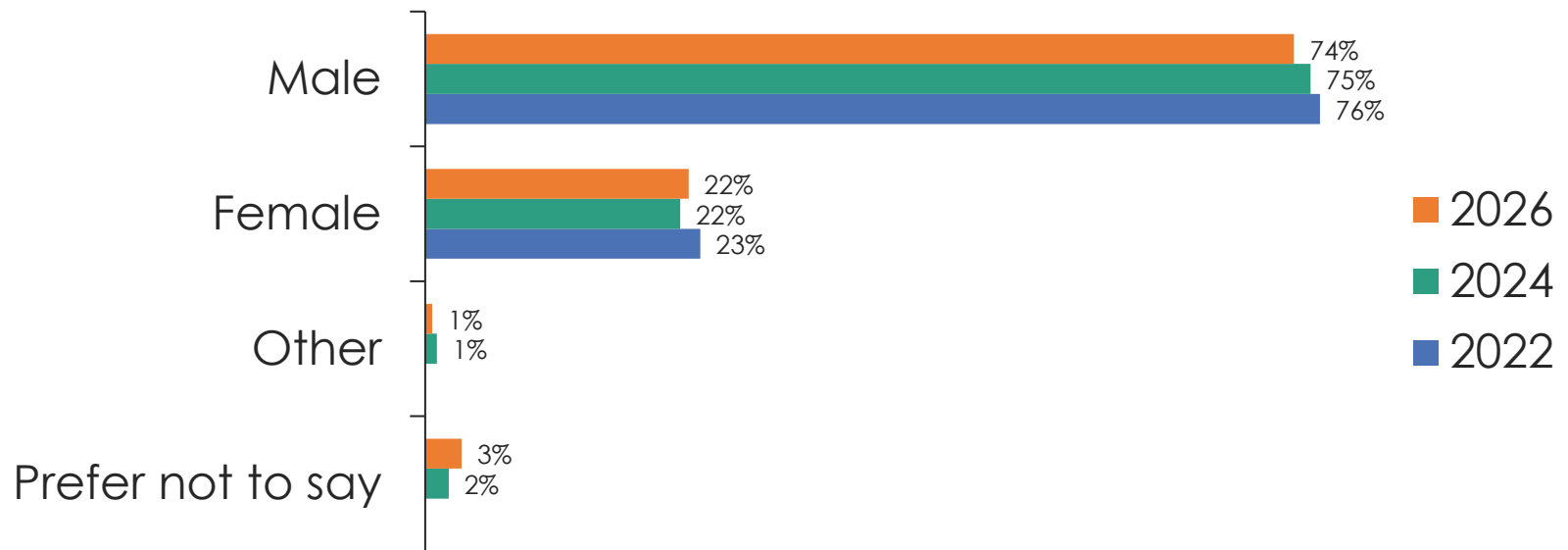


Conclusions and implications

- As with the 2022 and 2024 research, this 2026 research shows that energy industry leaders and influencers continue to view the sector's transition to the circular economy as important – and that it should be a top priority. Support for the transition remains very high (91%), and adoption of everyday circular-economy behaviours shows a mixed picture since 2024 – strong gains in some areas, such as driving an EV (+12 points), offset by declines in others, such as avoiding air travel (-13 points) and fixing electronics rather than replacing them (-9 points).
- It's clear from the research that industry experts and average people (especially younger people and those in senior roles) support a circular economy and are taking steps in their own lives to bring that to life.
- New in 2026, most respondents say their company or organisation has already taken concrete action – performing risk assessments (57%), changing how they view security of supply (50%), and diversifying sourcing (41%) – with large organisations (1,000+ employees) notably further along than SMEs.
- What's needed is for top influencers (government, regulators, investors, and – increasingly – politicians) to promote and facilitate the transition through policies, education, and positive reinforcement.
- Conducting this research in other countries and sharing the findings with influencers and decision makers can help build momentum for achieving a circular economy – by increasing understanding of the scope and pace of change that is expected, what people and businesses are already doing, and how best to move towards a circular economy.

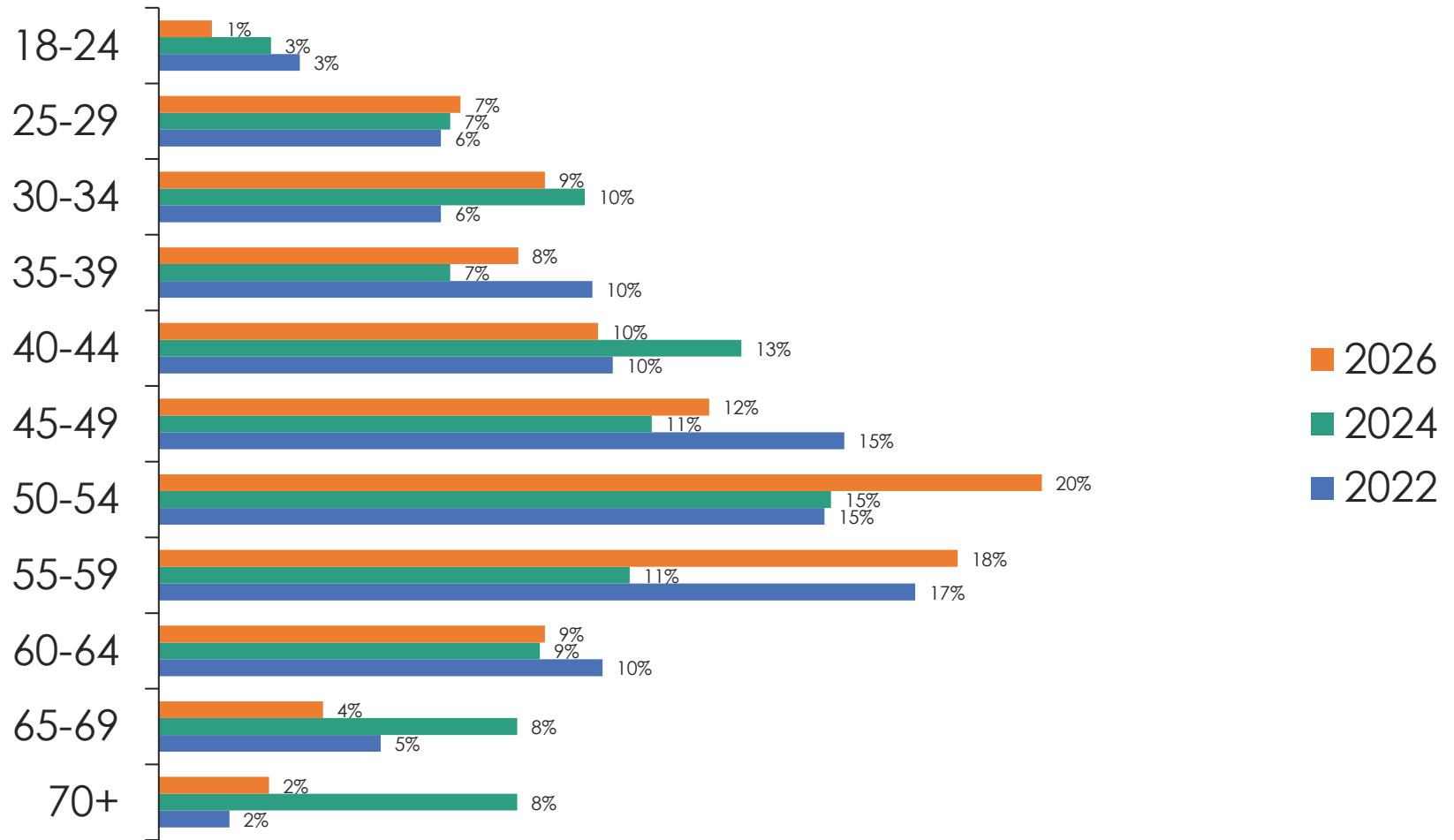
DEMOGRAPHICS

Gender



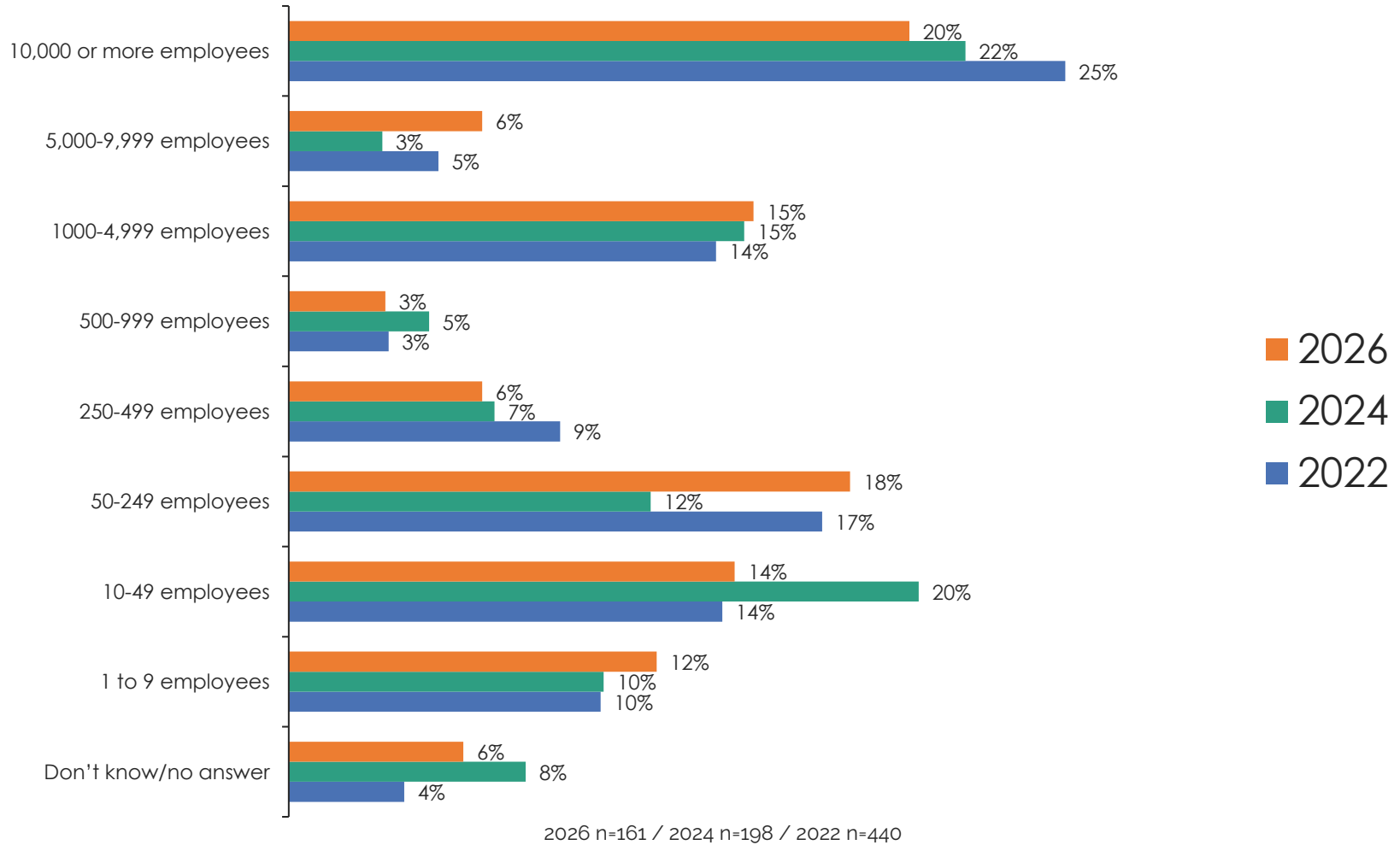
2026 n=161 / 2024 n=198 / 2022 n=440

Age

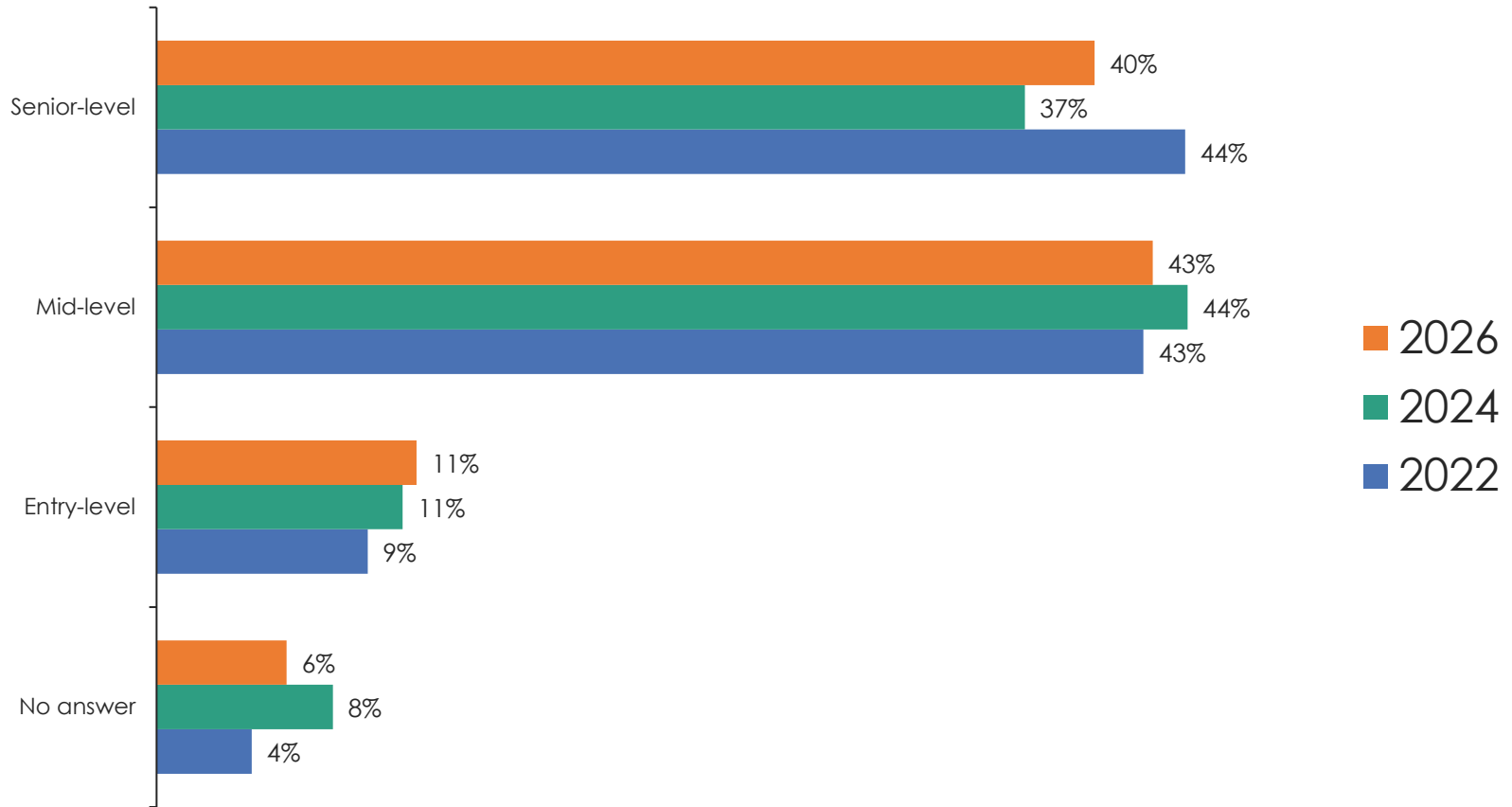


2026 n=161 / 2024 n=198 / 2022 n=440

Company Size



Seniority in Company



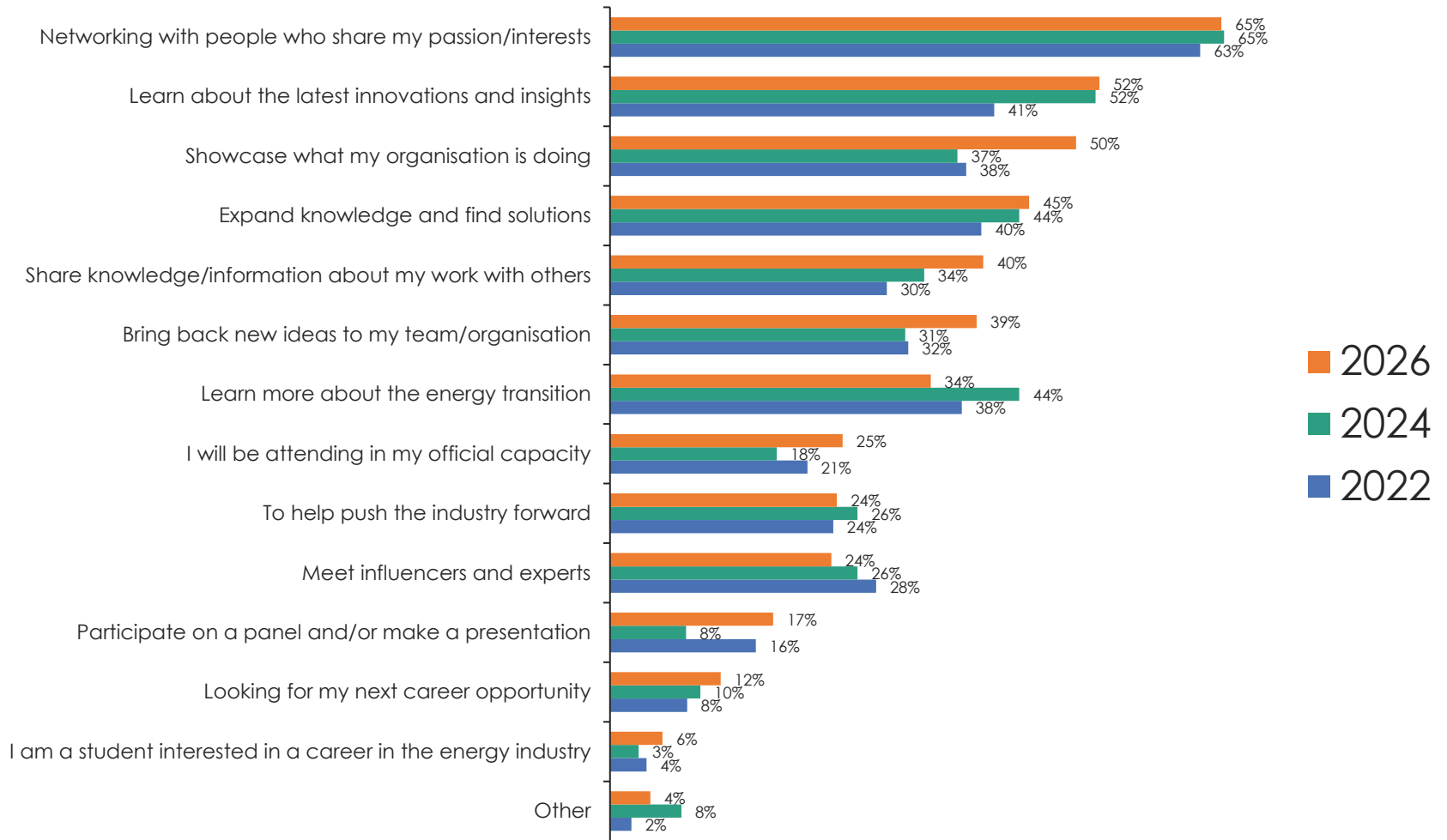
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Country



2026 n=161 / 2024 n=198 / 2022 n=440

Main reason(s) attending ONS conference



2026 n=161 / 2024 n=198 / 2022 n=440