

ONR Annual Stakeholder Research Report 2023



Contents

3	Background and methodology
5	Executive summary
8	Knowledge and advocacy
12	ONR's performance
16	ONR's influence
20	Ways of working
24	Engagement
28	Information, advice and guidance
32	ONR's future
36	Conclusions and recommendations
38	Contact us

Background

The Office for Nuclear Regulation (ONR) is responsible for regulating nuclear safety, security, safeguards and the transport of radioactive materials, across Great Britain.

ONR commissioned Savanta to undertake its Stakeholder Perceptions Research in 2023. The aim of this research is to:

- Measure the experience, attitudes and perceptions of ONR stakeholders, helping to track progress and provide guidance on what actions and strategies ONR should adopt
- Create a holistic understanding of stakeholders' views on key metrics and where to focus on for operational improvement and engagement
- Measure how perceptions stack up against ONR's strategic vision
- Understand stakeholder requirements and pinpoint what ONR could be doing more of / doing better to meet these needs
- Provide a benchmark view against other public bodies / regulators

Methodology: Quantitative

ONR stakeholders were surveyed online between 13th February and 17th March 2023.

282 respondents took part from a database of 1,391 contacts, representing a response rate of 20%.

Comparisons at an overall level are made with the 2022 survey run by Savanta, and the 2021, 2019 and 2018 ONR stakeholder surveys previously conducted by YouGov. The 2022 survey was run between 31st January and 4th March 2022. The 2021 survey was conducted between 14th January and 4th February 2021. The 2019 survey was conducted between 23rd October and 22nd November 2019. The 2018 survey was conducted between 11th October and 9th November 2018.

Differences are highlighted between sub-groups where they are statistically significant ($p < 0.05$). Although responses may appear to shift over time, due to different sample sizes these are often not significant enough to report on.

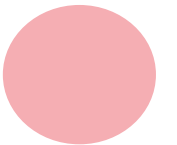
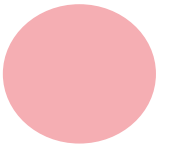
Percentages may not add up to 100% due to rounding. NET percentages are created by adding the two underlying numbers and dividing by the base total, not a sum of the percentages on the chart.

Sample breakdown

Stakeholder group	Number of responses
Academics/Professional Institute/Trade Bodies	9
Government Depts/Agencies/Public Bodies	50
Industry (Req parties/supply chain/tech consultants/contractors/PBO)	6
Interested Groups/Individuals	12
International	6
Licensees/Authorised sites	181
Local	8
Other dutyholders (transport/SSAC)	11

Stakeholder rating	Number of responses
A	43
B	94
C	135
D	10

Executive summary



Executive summary

Knowledge and advocacy

Stakeholder **understanding of ONR's role and purpose** is strong, with an indicative increase from 2022. The **vast majority of stakeholders** are also **confident** that ONR is **delivering on its mission** to protect society by securing safe nuclear operations.

Performance

ONR is generally perceived as **robust, trustworthy** and as working **in the interests of the public**, but not particularly **responsive to change**. There are also issues among stakeholders with ONR's **consistency and proportionality**. 2023 has seen high scores achieved on **trust** and **fairness**, with perception that ONR is working in the **interests of the public** also increasing year on year since 2018.

Influence

Most stakeholders say ONR has a **positive impact on public safety** and **nuclear security culture**, although ONR is **not particularly likely to be seen as agile or enabling innovation**. Similarly, most individual **licensees** also agree that ONR has a **positive influence on improving the safety and security culture in their organisation**.

Ways of working

Stakeholder sentiment towards **ONR's ways of working** is **mixed**. Just under half of stakeholders agree ONR **avoids imposing unnecessary regulatory burdens**, but almost a third of stakeholders say they neither agree nor disagree. Similarly, two in five stakeholders agree ONR has **efficient ways of working**, but just over a third say they neither agree nor disagree.

Executive summary

Engagement

ONR is **seen to do well** at **engaging** with stakeholders and **proactively seeking feedback from them**, although a notable minority continue to see little or no engagement.

Stakeholder sentiment around ONR's engagement has **improved slightly this year**, with the proportion of stakeholders saying ONR **proactively seeks feedback** and engages with them about its **priorities and plans** the highest on record in 2023.

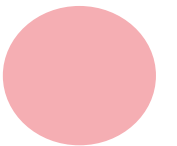
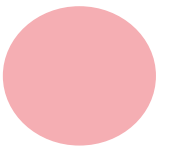
Information, advice and guidance

Over four in five stakeholders say the **information, guidance and advice** provided by ONR is either to a great deal or to some extent: "clear", "accessible" or "consistent".

ONR's future

Almost half of stakeholders are confident that ONR has the **resources and capabilities** to deliver its functions **now**, but confidence is **lower** for the **future** at just over a third. This also marks a **drop in confidence in 2023** in comparison to 2022 both now (**45%** from **50%**) and in the future (**35%** from **44%**).

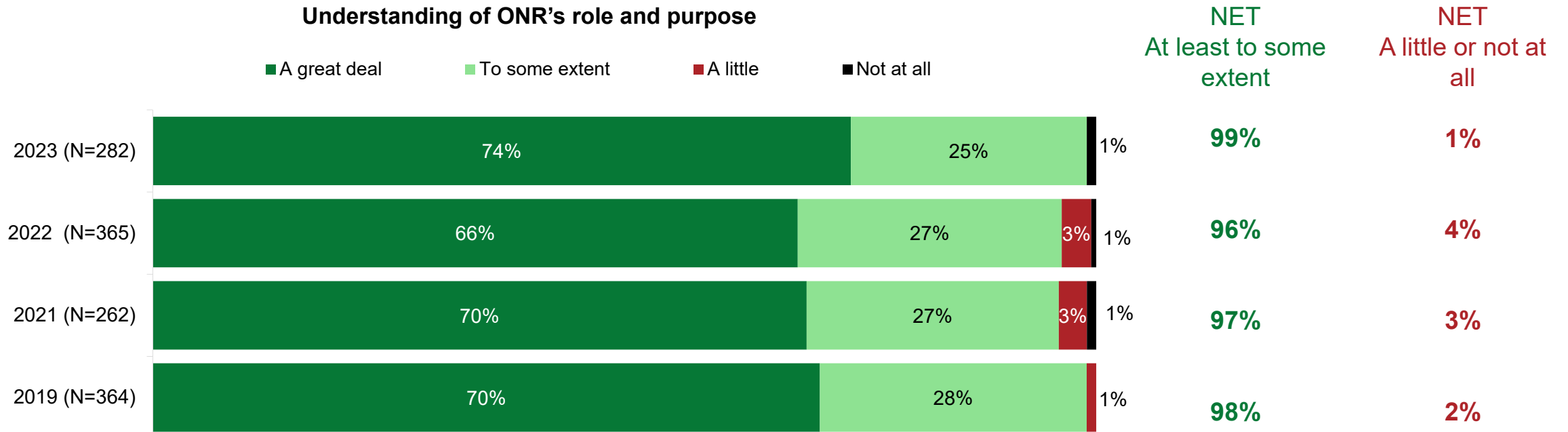
Knowledge and advocacy



Summary: Knowledge & Advocacy

- Stakeholder **understanding of ONR's role and purpose** has increased this year, with almost three quarters (74%) saying they understand it a great deal compared to seven in ten (70%) in 2022. Almost all stakeholders (99%) now say they understand this to at least some extent.
- Over nine in ten (91%) stakeholders are **confident that ONR is delivering on its mission** to protect society by securing safe nuclear operations.

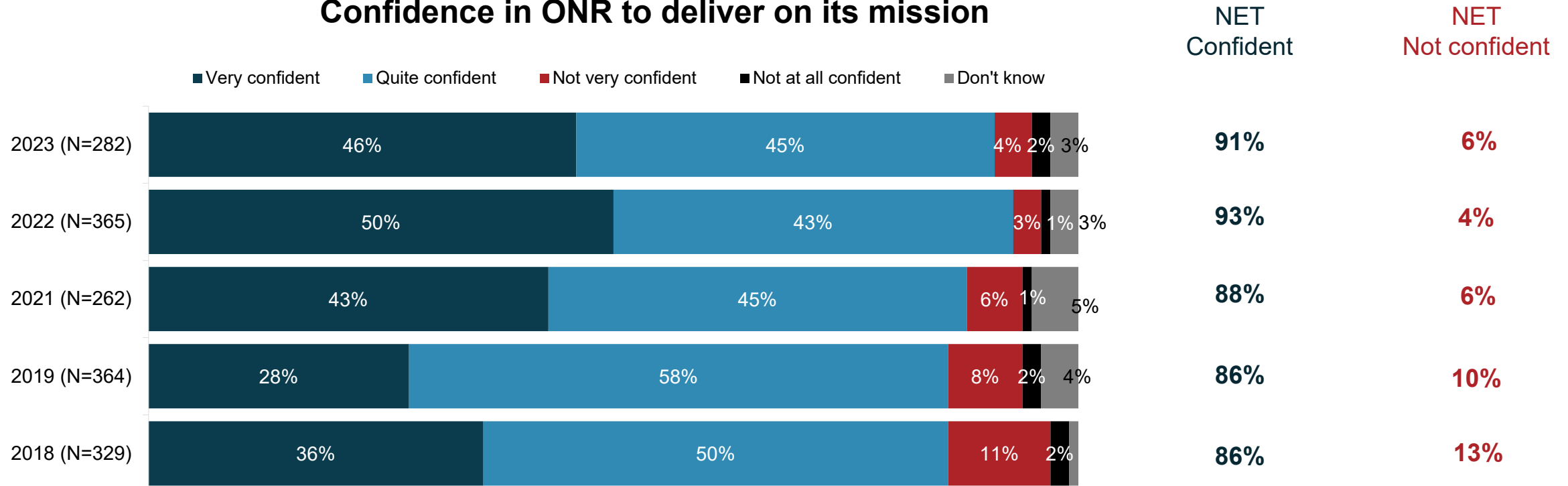
Stakeholder understanding of ONR's role and purpose has remained steady over the last three years



Almost all (99%) stakeholders in 2023 say they understand ONR's role and purpose to at least some extent, a slight increase on 2019 (96%), 2021 (97%) and 2022 (98%). Almost a quarter (74%) say they understand it a great deal.

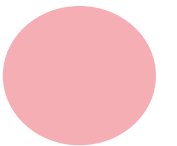
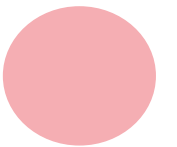
Nine in ten stakeholders are confident that ONR is delivering on its mission to protect society by securing safe nuclear operations

Confidence in ONR to deliver on its mission



Over nine in ten (91%) stakeholders say they are confident in ONR delivering on its mission to protect society by securing safe nuclear operations. This has plateaued after year-on-year increases up to 2022, though confidence remains at a high level.

ONR's performance

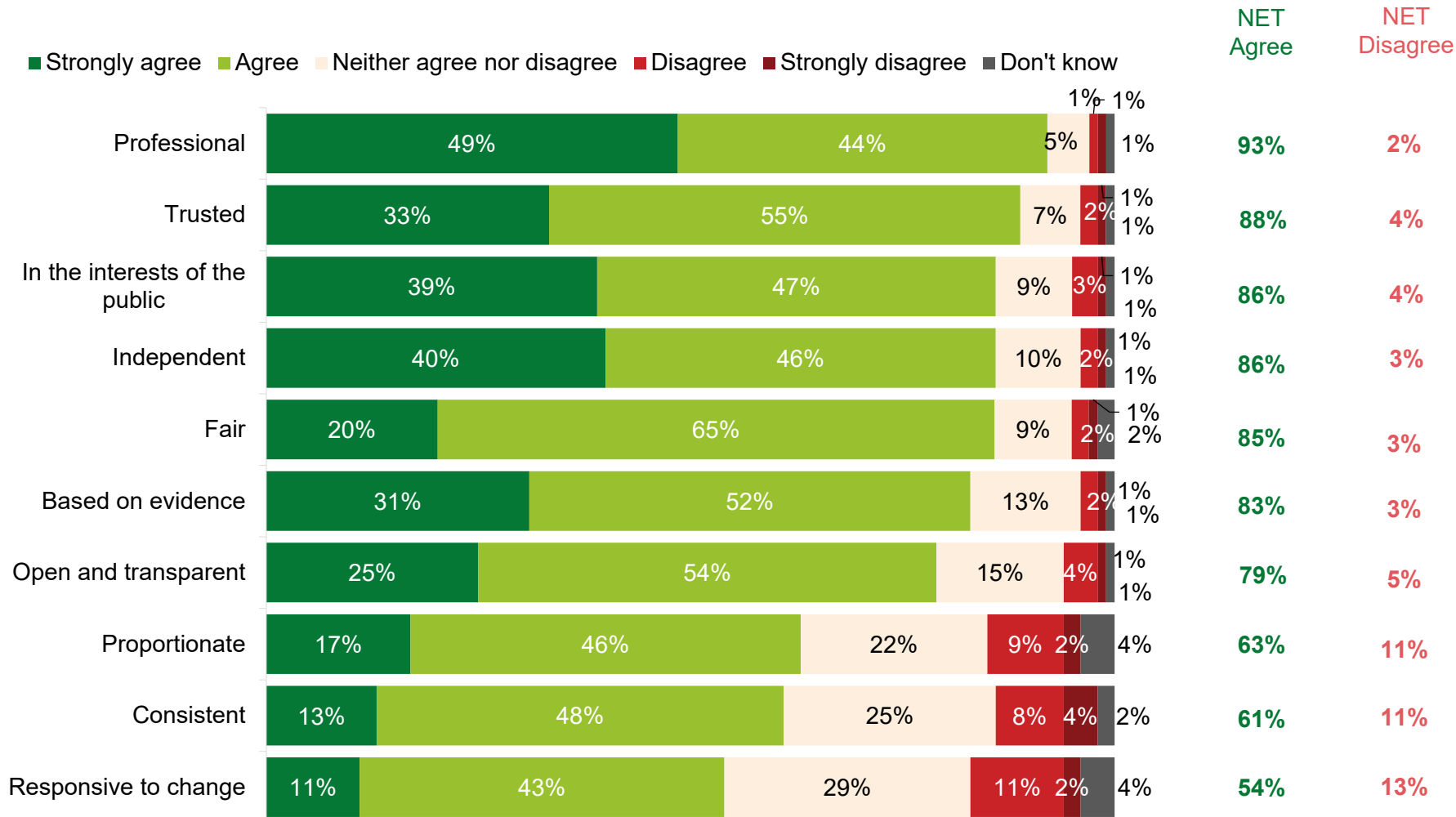


Summary: ONR's performance

- ONR is generally seen as **robust and trustworthy**, but not particularly **responsive to change**. There are also issues among stakeholders with ONR's **consistency and proportionality**.
- Stakeholders are *most likely* to say ONR operates in a way that is **professional** (93%), **trusted** (88%) and **independent** (86%), as well as in the **interests of the public** (86%).
- Stakeholders are *least likely* to say that ONR is **responsive to change** (54%), as well as **consistent** (61%) and **proportionate** (63%).
- Over time, ONR's strengths in terms of how it operates have been consistently viewed as being **professional, independent, in the interest of the public** and **trusted** by stakeholders.
- This year has seen a high score on **trust** (88%) and **fairness** (85%), with work in the **interests of the public** increasing year on year since 2018 (82%-86%).

Around nine in ten stakeholders agree that ONR is professional or trusted

ONR's strengths in the way it operates

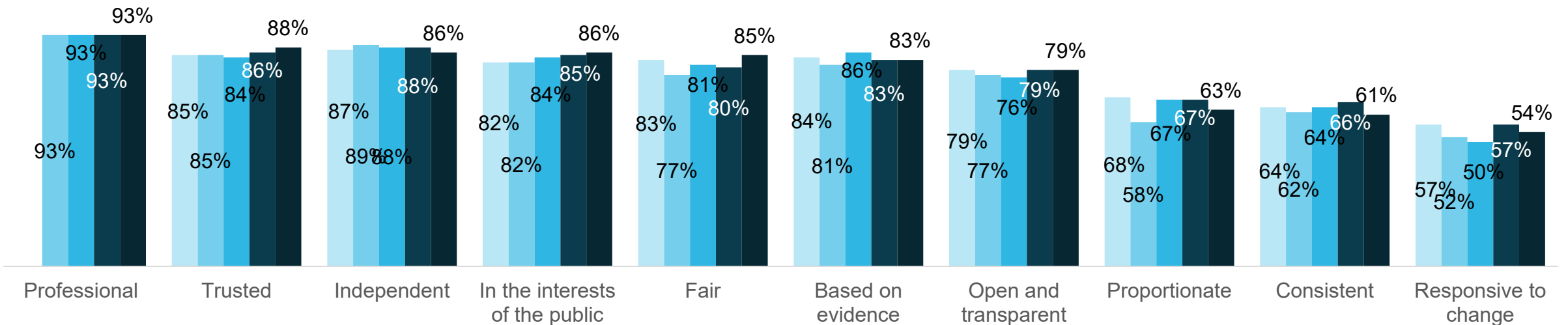


Around nine in ten stakeholders agree ONR operates in a way that is professional (93%) or trusted (88%), and just under nine in ten say ONR operates in the interests of the public (86%) or independently (86%). In contrast, over half (61%) agree ONR is responsive to change and one in ten (13%) disagree.

Levels of agreement around the ONR's strengths have generally not changed significantly over time

ONR's strengths in the way it operates – over time
Showing % NET: Agree

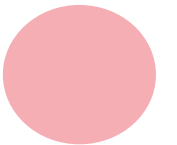
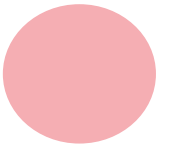
2018 (N=329) 2019 (N=364) 2021 (N=262) 2022 (N=365) 2023 (N=282)



Over time, ONR's strengths in terms of how it operates have been consistently viewed as being professional, independent, in the interests of the public and trusted by stakeholders.

This year has seen a high score on trust (88%) and fairness (85%), with work in the interests of the public increasing year on year since 2018 (82%-86%).

ONR's influence



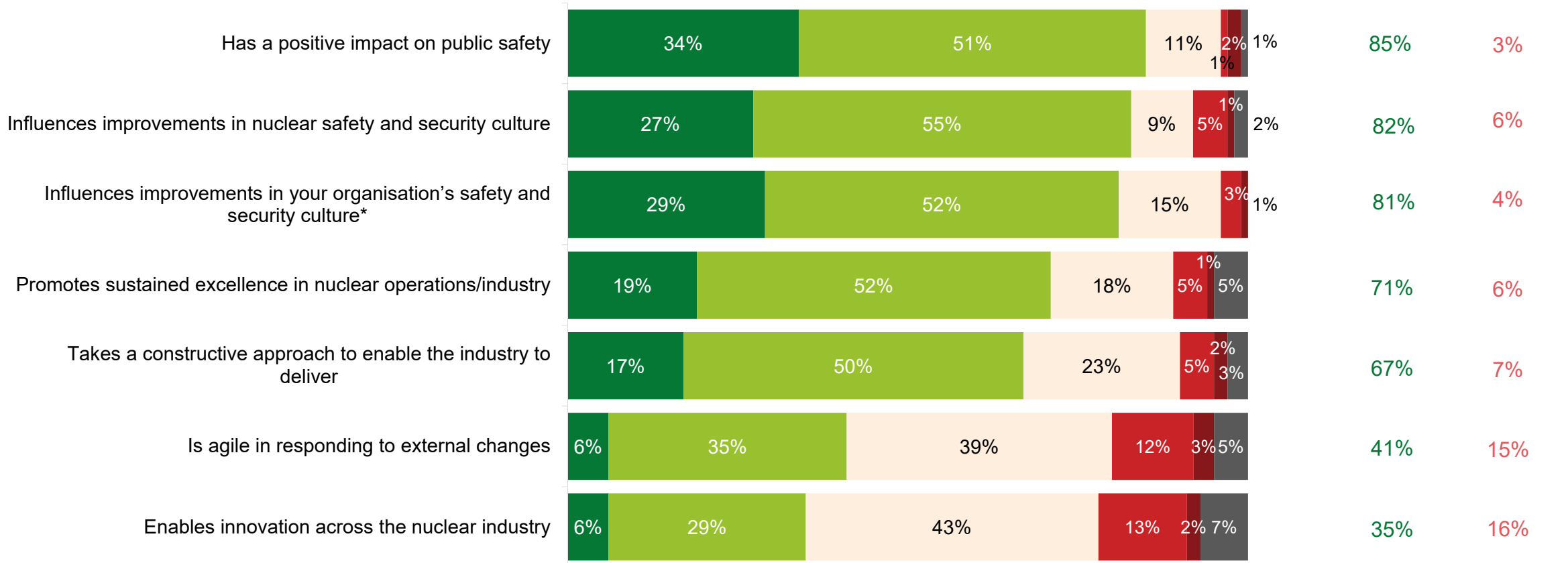
Summary: ONR's influence

- Most stakeholders say ONR has a **positive impact on public safety** (85%), with around four in five saying ONR **influences improvement in safety and security culture in the nuclear industry as a whole** (82%).
- Stakeholders are *least likely* to say ONR **enables innovation across the nuclear industry** (35%) a fall of three percentage points from last year (38%).
- Stakeholders are also unlikely to say that ONR is **agile in responding to external changes** (41%) a fall of four percentage points from last year (45%). Around one in six stakeholders **disagree** with both these statements (16% and 15% respectively).

Over four in five stakeholders agree ONR has a positive impact on public safety, while just over a third agree it enables innovation across the nuclear industry

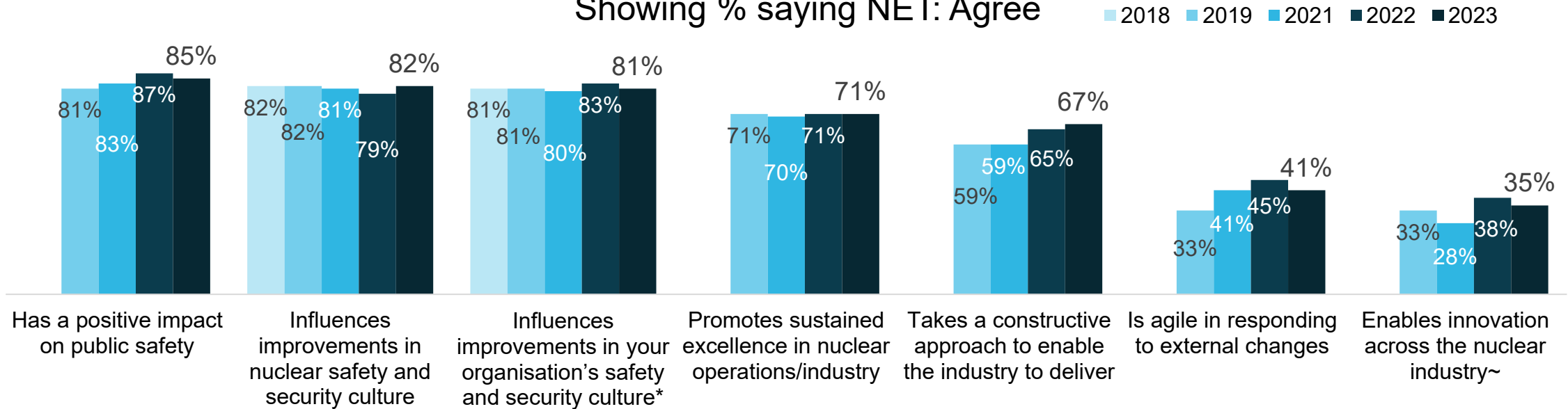
ONR's influence

■ Strongly agree
 ■ Agree
 ■ Neither agree nor disagree
 ■ Disagree
 ■ Strongly disagree
 ■ Don't know
 NET Agree
 NET Disagree



Agreement among stakeholders that ONR takes a constructive approach to enable to industry to deliver has increased year on year

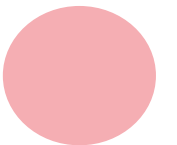
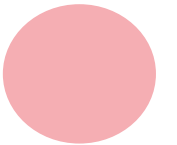
ONR's influence – over time
Showing % saying NET: Agree



There is a year-on-year increase in agreement that ONR takes a constructive approach to enable to industry to deliver (2019 59%, 2021 59%, 2022 65%, 2023 67%), while there has also been a slight increase in agreement that ONR influences improvements in nuclear safety and security culture since last year (2022 79%, 2023 82%). Agreement among stakeholders that ONR enables innovation across the nuclear industry has decreased from last year (2022 38%, 2023 35%).

However, agreement that ONR is agile in responding to external changes has decreased slightly since last year (2022 45%, 2023 41%).

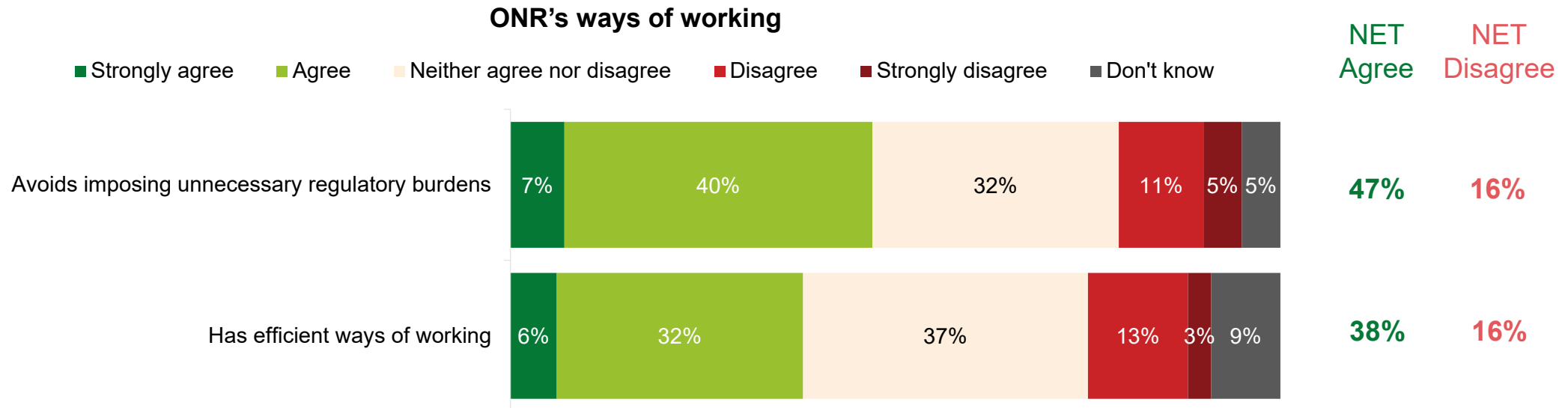
Ways of working



Summary: Ways of working

- Stakeholder sentiment on **ONR's ways of working** is **mixed**. Just under half (47%) of stakeholders agree ONR **avoids imposing unnecessary regulatory burdens**, but almost a third (32%) of stakeholders say they neither agree nor disagree.
- Similarly, two in five (38%) stakeholders agree ONR has **efficient ways of working**, but just over a third (37%) say they neither agree nor disagree.
- Whilst the role of any regulator is to ensure stakeholders are following stringent regulations, this suggests there may be an opportunity for ONR to **convert ambivalence around its enforcement and efficiency into positivity**.
- Stakeholder sentiment around whether ONR **avoids imposing unnecessary regulatory burdens** has remained steady over recent years, with just under half now in agreement (47%), a slight increase on 2022 (45%), but an overall decline from 52% in 2018.

Just under half of stakeholders agree ONR avoids imposing unnecessary regulatory burdens, and two in five agree it has efficient ways of working



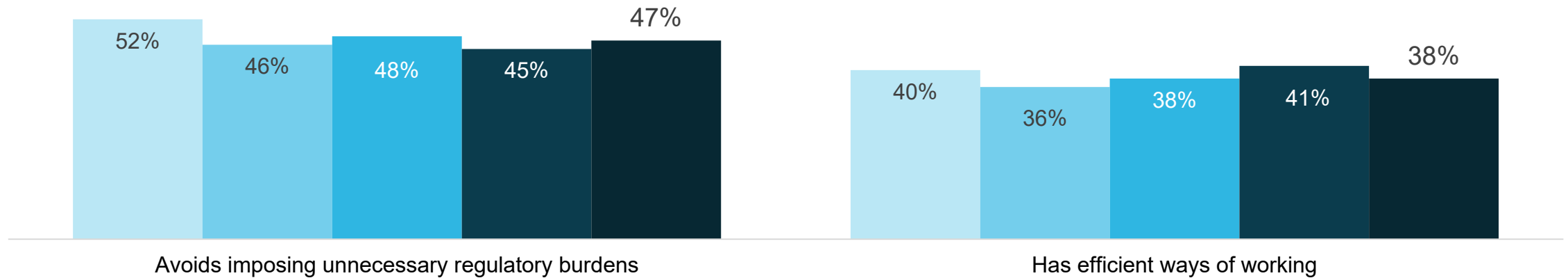
Just under half (47%) of stakeholders agree ONR avoids imposing unnecessary regulatory burdens, and one in six (16%) disagree. Almost a third (32%) of stakeholders say they neither agree nor disagree, and less than one in ten (5%) say they don't know.

Two in five (38%) stakeholders agree ONR has efficient ways of working, whereas one in six (16%) disagree. Just over a third (37%) say they neither agree nor disagree, and under one in ten (9%) say they don't know.

Stakeholder sentiment around whether ONR has efficient ways of working has remained steady over recent years

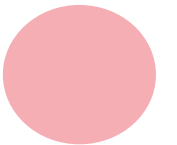
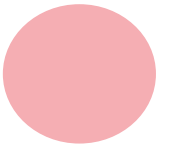
ONR's ways of working – over time
Showing % saying NET: Agree

2018 2019 2021 2022 2023



Stakeholder sentiment around whether ONR avoids imposing unnecessary regulatory burdens has remained steady over recent years, with just under half now in agreement (47%), a slight increase on 2022 (45%) but an overall decline from 52% in 2018.

Engagement

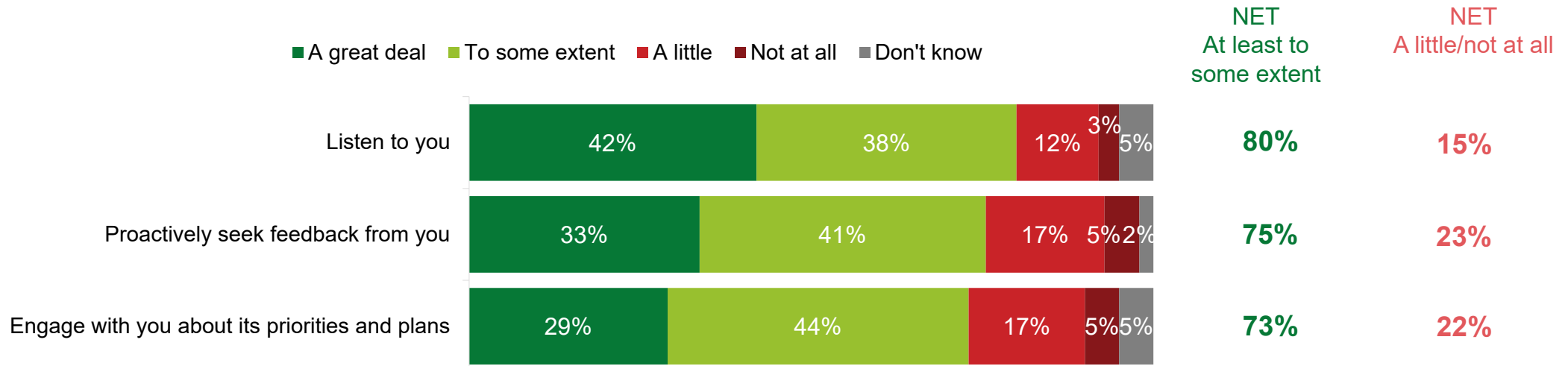


Summary: Engagement

- ONR is **seen to do well** at engaging with stakeholders, with four in five (80%) stakeholders saying ONR **listens to them** at least to some extent, followed by three quarters (75%) who say ONR **proactively seeks feedback from them**. In turn, just under three quarters (73%) say ONR **engages with them about its priorities and plans** to at least some extent.
- Just under a quarter (22%) say ONR **engages with them about its priorities and plans** a little or not at all, with the same proportion (23%) saying that ONR **proactively seeks feedback** from them a little/not at all.
- Stakeholder sentiment around ONR's engagement has **improved slightly in 2023**, with the proportion of stakeholders saying ONR – to at least some extent – **proactively seeks feedback** from them, the highest on record (75%). The same is true for ONR's engagement with stakeholders about its **priorities and plans** (73%).

Four in five stakeholders say ONR listens to them to at least some extent, compared to three quarters who say ONR proactively seeks feedback from them

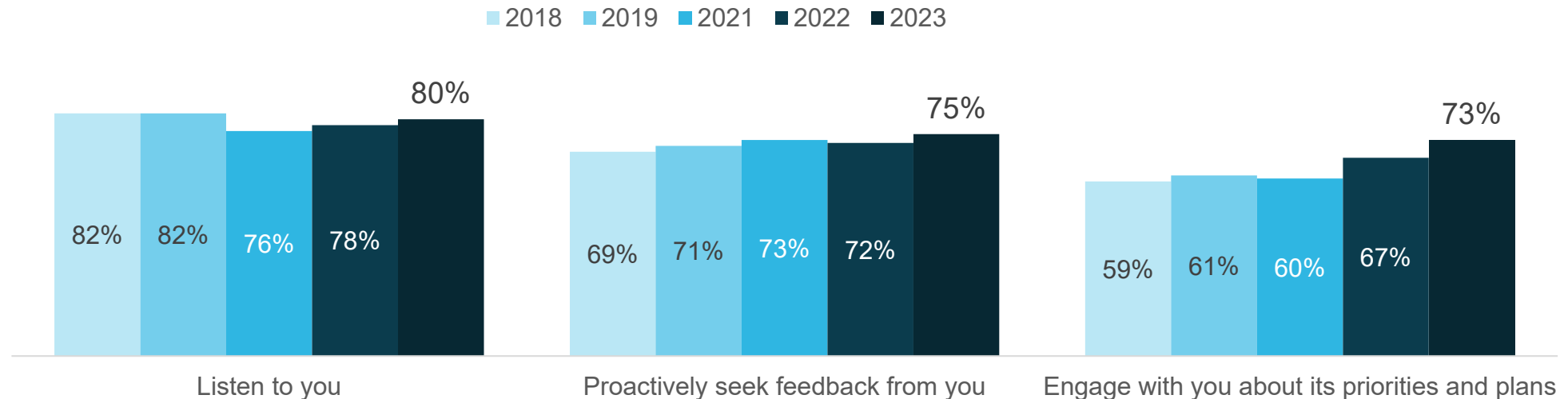
Engagement with stakeholders



Four in five (80%) stakeholders say ONR listens to them at least to some extent, followed by three quarters (75%) who say ONR proactively seeks feedback from them. While just under three quarters (73%) say ONR engages with them about its priorities and plans to at least some extent, just under a quarter (22%) say ONR engages with them about this a little or not at all. Just under a quarter (23%) also say that ONR proactively seeks feedback from them a little/not at all.

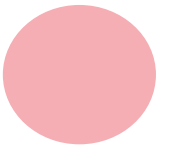
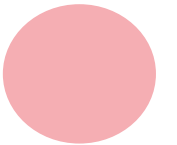
Perceptions of ONR's engagement are fairly consistent over the years, although stakeholders are now the most likely they have ever been to say ONR proactively seeks feedback or engages with them about its priorities and plans

Engagement with stakeholders – over time
Showing % NET: At least to some extent



Stakeholder sentiment around whether ONR listens to them has remained steady over recent years, with around four in five (78%-82%) saying they do to at least some extent. Since 2018, there has been an increase in the proportion of stakeholders saying ONR – to at least some extent – proactively seeks feedback from them (2023, 75%; 2018, 69%) and engages with them about its priorities and plans (2023, 73%; 2018, 59%).

Information, guidance and advice

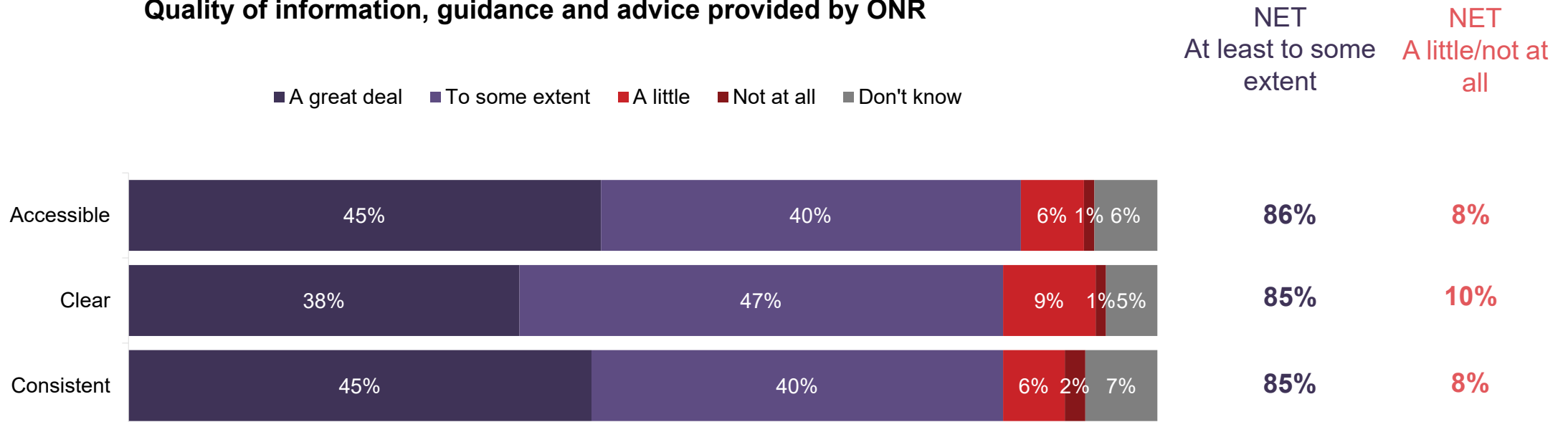


Summary: Information, guidance and advice

- **Over four in five** stakeholders say the **information, guidance and advice** provided by ONR is at least to some extent **clear** (85%), **accessible** (86%) and **consistent** (85%).
- Stakeholder agreement that **ONR's information, guidance and advice** is to at least some extent **accessible** has **increased slightly from last year** (86% up from 82%), whilst agreement that ONR's information, guidance and advice is to at least some extent **consistent** has **increased year-on-year since 2018** (85% up from 77%).

Over four in five stakeholders think ONR's information, guidance and advice is clear, accessible or consistent

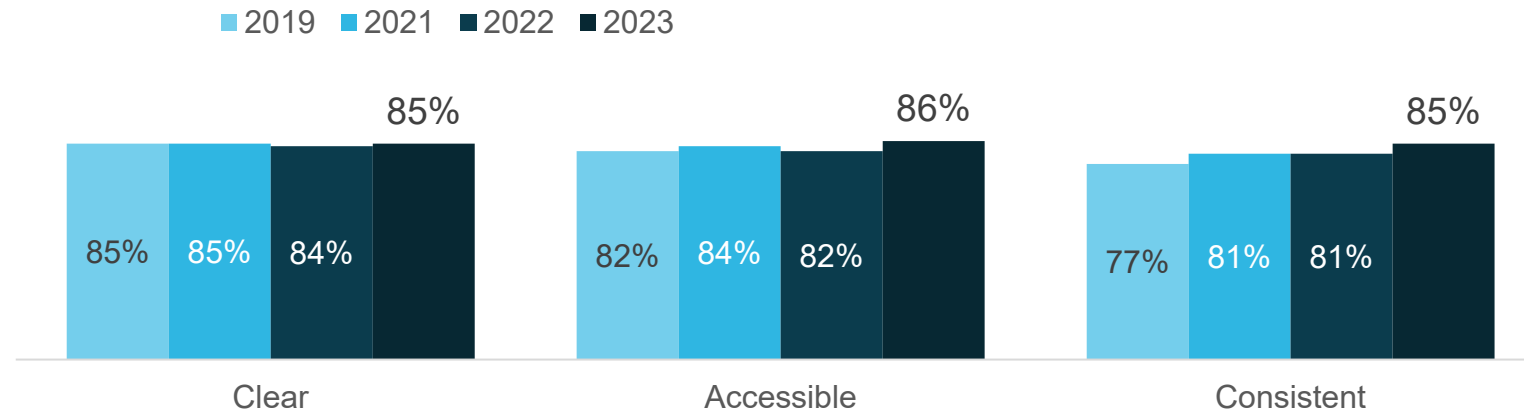
Quality of information, guidance and advice provided by ONR



Over four in five stakeholders say the information, guidance and advice provided is at least to some extent clear (85%), accessible (86%) or consistent (85%).

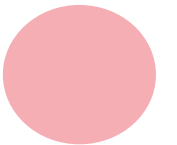
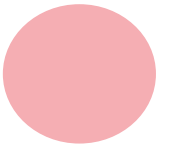
Agreement that ONR's information, guidance and advice is accessible and consistent to at least some extent has increased slightly from last year

Quality – over time
Showing % saying NET: At least to some extent



Stakeholder agreement that ONR's information, guidance and advice is to at least some extent **accessible** (86%) has increased slightly from last year (82%), whilst agreement that ONR's information, guidance and advice is to at least some extent **consistent** (85%) has increased year-on-year (up from 81%).

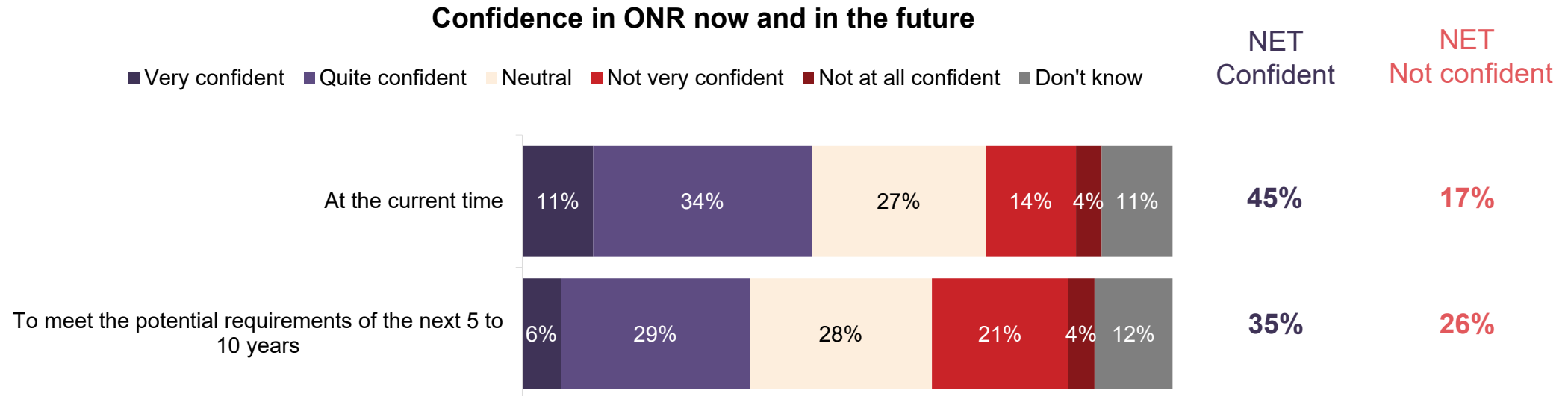
ONR's future



Summary: ONR's future

- Just under half (45%) of stakeholders are confident that ONR has the resources and capabilities to deliver its functions **now**. Confidence is lower in the future; 35% are confident that ONR will meet the potential requirements of **the next 5 to 10 years**, while around a quarter say they are not confident (26% respectively).
- This also marks a **drop in confidence in 2023** – confidence that ONR has the resources and capabilities to deliver its functions at the current time has dropped in comparison to 2022 (45% down from 50%), as has confidence that ONR will meet the potential requirements of the next 5 to 10 years (35% down from 44%).

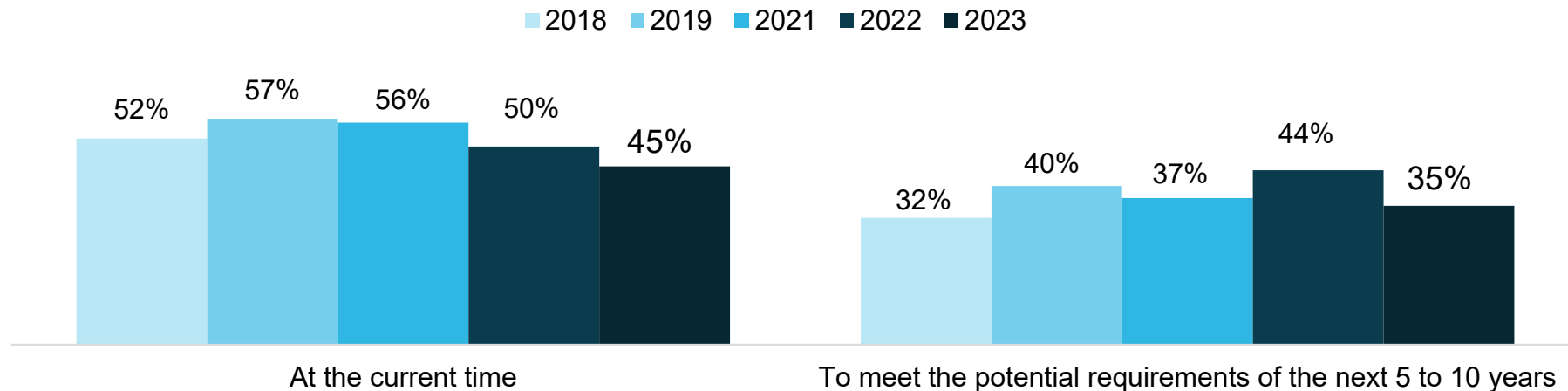
Just under half of stakeholders are confident ONR has the resources and capabilities to deliver its functions. This drops to almost a third who are confident for the potential requirements in the next 5 to 10 years



45% of respondents are confident that ONR at the current time has the resources and capabilities to deliver its functions, however there is less confidence over that ONR will be able to meet requirements of the next 5 to 10 years. More than a quarter of respondents (26%) are not confident ONR has the resources to meet requirements over the next 5-10 years, and another 28% are neutral, suggesting that there is some uncertainty about if ONR will continue to be able to meet the potential requirements.

Confidence that ONR has the resources and capabilities to deliver its functions at the current time has dropped in comparison to 2022 by five percentage points

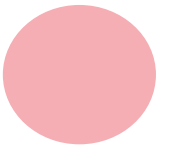
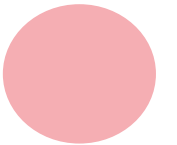
Confidence in ONR now and in the future – over time
Showing % saying NET: Confident



Stakeholders are less confident that ONR has the resources and capabilities to deliver its functions at the current time continuing to fall from the peak in 2019. There has been a similar drop in the proportion of stakeholders saying they are confident ONR has the resources and capabilities to meet the potential requirements of the next 5 to 10 years, dropping nine percentage points since 2022.

Confidence that ONR has the resources and capabilities to meet the potential requirements of the next 5 to 10 years has also fallen since 2022 by nine percentage points to 35%. This is lower than any year since 2018 when under a third (32%) of stakeholders were confident.

Conclusions and recommendations



ONR's overall performance continues to be strong

ONR's role is **well-understood** among stakeholders, and the vast majority are confident in its ability to deliver on its mission to protect society by securing safe nuclear operations.

ONR is seen as a **robust** organisation that fulfils its core remit well. This year has seen record scores on trustworthiness, fairness and belief it works in the public interest.

Communications are strong, and ONR's information, advice and guidance are perceived as clear, accessible and consistent.

Overall, ONR can continue to be assured of stakeholder confidence in its core remit, and there are no major gaps in ONR's fundamental operations in the eyes of stakeholders.

Areas where ONR can improve in the future

Engagement

Whilst engagement scores are high overall – including record scores on proactively seeking feedback and engaging with stakeholders in 2023 – a significant minority say they receive little or no engagement. These are more likely to be in lower priority groups, suggesting engagement could be more evenly spread across all stakeholders.

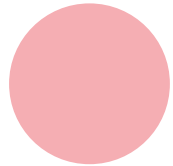
Agility, innovation and responsiveness to change

Many stakeholders continue to score ONR lower on innovation and responsiveness to change, as well as consistency and proportionality. A more dedicated focus on communicating innovation may benefit ONR in the long run, as well as clearer communication on the decisions it makes in its role as a regulator.

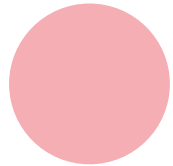
Confidence in ONR

Confidence in ONR's ability to deliver its functions both now and in the future has seen a drop this year, particularly among licensees. Stakeholders may need more reassurance that ONR has both the resources and capabilities to carry out its core functions.

Contact us



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