



Stakeholder Research

Summary report

Prepared for the NSW Environment Protection Authority

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Introduction

Background

Formed in 2012, the NSW Environment Protection Authority (EPA) is the primary environmental regulator for New South Wales. Its aims are to:

- Protect, restore and enhance the quality of the NSW environment;
- Maintain ecologically sustainable development;
- Reduce the risks to human health; and
- Prevent the degradation of the environment.

The EPA actively communicates and engages with a wide range of stakeholders. These stakeholder groups include:

- Community groups and members of the general public;
- Licensees, industry groups, peak bodies and businesses (e.g., manufacturing, construction, mining etc.);
- Environment groups and relevant Non-Government Organisations (NGOs);
- EPA staff members (internal stakeholders);
- Local Government councils and shires;
- NSW Government agencies (Environment, Water, Planning, Health, etc.);
- Interstate EPAs and government agencies; and
- The Australian Government.

In 2013, the EPA commissioned Ipsos SRI to undertake an initial study of its stakeholders. This piece of research consisted of three core components:

- An online survey of n=386 NSW residents;
- An online survey of n=136 key stakeholders from community and environment groups, government and industry; and
- n=45 in-depth interviews and 4 mini discussion groups with stakeholders.

Eight primary recommendations, in addition to numerous sub-recommendations, were provided to the EPA as a result of this research. The majority of the recommendations were aimed at addressing stakeholders' concerns about the way the EPA communicated with them.

About this report

In 2016, Ipsos SRI was commissioned to repeat the Stakeholder Survey in order to:

- Track key findings from the 2013 iteration, in particular:
 - Knowledge;
 - Perceptions;
 - Attitudes; and
 - Expectations
- Identify emerging issues among stakeholders relevant to the EPA
- Understand the expectations of the general public
- Identify new ways to engage with stakeholders
- Inform future communication and engagement strategies
- Measure the EPA's performance against the EPA Strategic Plan
 - In particular Key Result Area 5 – Effective communication and stakeholder engagement; and
 - The Premier's Priority 12 – Increase customer satisfaction with key government services every year, this term of government.

Following an internal stakeholder workshop with EPA staff to identify and prioritise key stakeholder groups and salient issues to consider, quantitative and qualitative research was carried out as follows:

Quantitative research (online surveys)

- n=575 stakeholders and informed community members
- n=1,000 general population
- November-December 2016

Qualitative research with stakeholders

- 30 in-depth interviews
- 2 online focus groups
- December 2016

Findings

Overall, the 2016 survey reached a broader range of stakeholder groups and a greater number of stakeholders, to provide a survey that is much more representative of all EPA stakeholders. Compared with the previous survey in 2013, improvements are identified in the EPA's communications and stakeholder engagement and progress is noted in many of the benchmarks set in 2013.

Knowledge of the EPA

General population

Key findings

- Awareness of the EPA is high and has been maintained since 2013.
- Detailed knowledge about the EPA tends to be lower. About 50% of respondents know at least *a little* about the EPA and 10% know at least *a fair amount*.
- Knowledge of the EPA's role is mixed, with good awareness where its role is clear cut, but lower where other agencies also play a role. In particular, relatively few participants are aware that the EPA has a key role in managing waste and recycling and responding to excessive noise.
- Attitudes are more positive among those with higher levels of knowledge of the EPA, and improving knowledge may have several positive effects for the organisation.
- Traditional media remain the key sources of information about the EPA.

Awareness of the EPA remains high and has been maintained against 2013 levels. The vast majority of the general population have heard of the EPA (84%) and half (49%) know at least *a little* about it. This is similar to 2013, when 47% knew at least *a little*. However, in-depth knowledge of the EPA

continues to be uncommon among the general population. Only 10% feel that they know *a fair amount* or *a great deal* about the organisation. **Both age and gender are related to reported knowledge of the EPA.** Older participants (aged 50+) and men are more likely to report knowledge of the EPA than younger participants (aged 18-29) and women respectively.¹

As was the case in 2013, **knowledge of the EPA's role in relation to the range of activities it regulates is mixed.** In particular, where other agencies have a leading role in delivering services, knowledge of the EPA's role is limited. The EPA is most strongly associated with air quality, responding to harmful environmental incidents and ensuring that industries work within environmental regulations². On the other hand, *local councils* are seen as the key agency responsible for managing waste and recycling (72% compared to 24% for the EPA), and only 20% see the EPA as responsible for responding to excessive noise (compared with 47% for *NSW Police, Fire and Rescue*). These findings are perhaps unsurprising given the public facing roles of councils and emergency services in relation to waste and noise complaints.

Higher levels of knowledge of the EPA are associated with higher engagement with the EPA and higher satisfaction with the level of environmental protection in NSW. Those with higher levels of knowledge of the EPA are more likely to:

- Be aware of the EPA's role in relation to environmental issues it regulates³;
- Contact the EPA for each environmental issue⁴;
- Agree that the EPA demonstrates a range of positive attributes⁵; and

¹ 59% of those aged 50+ know at least *a little* about the EPA, compared with 32% of those aged 18-29; and 59% of men know at least *a little*, compared with 38% of women.

² In particular, a greater proportion of participants see the EPA, as opposed to other organisations, being responsible for air quality, odours and dust (59%); responding to harmful environmental incidents (58%); and ensuring that industries work within environmental regulations (50%).

³ Those who know at least *a little* about the EPA are more likely to see the *EPA* as the responsible organisation for all issues (than those who knew nothing about it), except national parks (which the EPA is not responsible for).

⁴ Those with at least *a little* knowledge of the EPA are more likely than those with no knowledge to contact the EPA for all issues, with the exception of native forest logging. Those without knowledge are more likely to give a response of *don't know* for all issues.

⁵ Those with at least *a little* knowledge of the EPA are more likely to agree that the EPA demonstrates these.

- Be satisfied with the level of environmental protection in NSW⁶.

Traditional media remains the main sources of information about the EPA, although there appears to have been a decrease in information received from these sources since 2013. However, this finding should be treated with caution as a relatively large proportion of participants (17%) in 2016 reported seeing EPA advertising, a response category that was not included in the survey in 2013. Smaller proportions of the general population have heard about the EPA through traditional media in 2016 than had in 2013, including *television* (24%, down from 38%), *newspapers* (21%, down from 36%) and *radio* (11%, down from 18%). **Recall of news about the EPA is relatively low.** Only 14% of the general population recall having heard or read news stories about the EPA in the past 12 months. However, more people have been positively influenced by news stories about the EPA than have been negatively influenced. Almost one in 10 (8%) have had their attitude towards the EPA positively influenced by news in the past 12 months. This compares with fewer than 3% who have had their attitude towards the EPA impacted in a negative way by news stories.

Engagement with the EPA through digital sources remains low in comparison to traditional media.

One in eight (12%) have received information about the EPA via the *internet*, 7% through the *EPA website* and 5% via *social media*. However, **interest in interacting the EPA via digital media is higher.** When asked which sources they would like the EPA to use to communicate with them in relation to a range of environmental issues, substantial proportions selected the *EPA website* (ranging from between 21% and 27% per issue) and *Facebook* (between 13% and 15%). The preference for *Facebook* is higher among the youngest age group (18-29; between 21% and 27% depending on the specific issue). In addition, younger participants are more likely than older groups to want to use *Facebook* or *Twitter* to contact the EPA.⁷

⁶ Knowledge of the EPA appears to be associated with greater levels of satisfaction.

⁷ 15% would like to use *Facebook* and 8% would like to use *Twitter* to report pollution, and 19% and 9% respectively to find information about pollution incidents in their area.

Stakeholders

Key findings

- Stakeholders have a good general understanding of the role of the EPA. The EPA is associated primarily with regulation, but increasingly with education.
- There is an appetite for building a deeper understanding of the role and remit of the EPA, and particularly of its role in relation to other Government agencies.

The qualitative research with stakeholders found that there is **good general awareness** of the areas the EPA works in. However, most stakeholders **lack a detailed understanding** of areas the EPA works in that are outside of their own area of expertise.

The EPA is viewed by some as simply a regulation and enforcement body, with its sole role being environmental protection. Others are aware that the EPA's role extends to grant funding (among business grantees) and provision of resources, guidance and advice (among local government). Awareness is highest in relation to the EPA's roles in education, waste (litter, recycling and illegal dumping), compliance, pollution (of air and water), monitoring and regulation (e.g. forestry), and auditing. Fewer are aware that the EPA regulates coal seam gas mining and wind farming.

The qualitative research revealed that there is some **confusion among stakeholders about the remit of the EPA's role** in comparison to other agencies, particularly those in the environment cluster such as the NSW Office of Environment and Heritage (OEH) and the NSW Department of Planning and Environment. Some perceived that there is a duplication of roles between the agencies.

There is an **appetite for more information** about the work of the EPA and about the remit of different NSW government bodies, for example through newsletters or social media. Setting clear expectations about issues and incidents the EPA is authorised to act on is likely to help the EPA manage relationships with its stakeholders.

Perceptions of the NSW EPA

Key findings

- Stakeholders are generally satisfied with the EPA's overall performance, and levels of satisfaction have increased among all stakeholder groups since 2013.
- Satisfaction with the level of environmental protection in NSW is also high among both the general population and stakeholders. The general population perceives the majority of environmental issues in NSW as being well managed. Management of contaminated land sites and the environmental impacts of coal seam gas receive the lowest performance ratings.
- A smaller proportion of stakeholders is satisfied with environmental protection in NSW than is satisfied with the EPA's overall performance.
- Both the general population and stakeholders have a generally positive view of the EPA's leadership and effectiveness, its conduct and credibility. Among both audiences, however, there is an opportunity for the EPA to improve perceptions of its level of innovation and online accessibility.
- Sentiment is consistently most positive among government and industry stakeholders, while slightly less positive among environment and community stakeholders. There appears to be an association between higher levels of engagement with the EPA and higher satisfaction.

General population

Among the general population, satisfaction with the level of environmental protection in NSW is high relative to dissatisfaction. Two-fifths are satisfied (40%), compared with one-fifth who are dissatisfied (20%).

Similarly, the general population perceives the **majority of environmental issues in NSW as being well managed** (a mean rating of between *fairly good* and *neither good nor poor*). This includes almost all issues they see as being both:

- The EPA's responsibility (that is, they would be most likely to contact the EPA for, as opposed to other agencies); and
- High priority.

Among such issues, ratings are most positive for the management of water pollution (43% rate the management of this issue as good) and air quality, odours and dust (42%). Similar proportions provide positive ratings for the management of environmental incidents (41%); hazardous materials and industrial chemicals (40%); the use of radiation equipment and radioactive substances (36%); and the environmental regulation of industry (36%).^{8 9}

However, **perceptions of the regulation of contaminated land sites and the environmental impacts of coal seam gas are less positive.** Comparatively few participants believe the management of these issues is good (29% and 21% respectively). Importantly, the general population sees the EPA as being responsible for both issues and perceives them as high priority.¹⁰

While littering and illegal dumping also receive relatively low performance ratings (32% and 26% respectively), the general population tend not to see these as the EPA's responsibility. For both of these issues, a far greater proportion of the general population would contact their local council (65% and 64% respectively) than the EPA (15% and 22% respectively).¹¹

While perceptions of the EPA are positive, low levels of detailed knowledge of the organisation appear to limit the scope for the EPA to generate more positive sentiment.

The community has a generally positive view of the EPA's leadership and effectiveness, and perceptions have improved slightly since 2013.

⁸ 78% of the general population see water pollution as either an *essential or high priority* in environmental regulation; 68% for air quality, odours and industry; 67% for environmental incident management; 76% for hazardous materials and industrial chemicals; 67% for use of radiation equipment and radioactive substances; and 65% for environmental regulation of industry.

⁹ Ratings are also generally positive for native forest logging (33%) and pesticide use (30%), which the general population also most commonly see as the EPA's responsibility, although they typically see these as lower priorities than the issues mentioned above (58% see native forest logging as either an *essential or high priority*, and 57% for pesticide use).

¹⁰ 72% of the general population see contaminated land sites as either an *essential or high priority*, and 67% for environmental impacts of coal seam gas.

¹¹ Similarly, for both waste management and recycling and excessive noise, a smaller proportion of the general population would contact the EPA than their local council¹¹, although ratings are relatively positive for each of these (57% and 41% respectively).

Stakeholders

Stakeholders are generally satisfied with the EPA's overall performance (67%, including 20% who are *very satisfied*). **Satisfaction has increased among all stakeholder groups** since 2013¹², demonstrating the effectiveness of the EPA's engagement strategy between the previous and current survey periods.

Satisfaction is associated with positive perceptions of the EPA. This highlights the importance of continuing to ensure high satisfaction levels among stakeholders. Those who are satisfied are more likely to agree:

- With positive statements about the EPA; and
- That the EPA exhibits each of the attributes presented to them.

Satisfaction is similarly high with the interactions stakeholders have had with the EPA:

- Seventy-one percent are satisfied with their interactions with the EPA; and
- Seventy-seven percent with the communication methods used by the EPA.

Comparisons with 2013 are not possible for these areas.¹³ However, the high satisfaction levels with interactions suggest that improvements in satisfaction with the EPA's overall performance over the past three years may have been influenced by more positive experiences with engagement.

Perceptions of the level of environmental protection in NSW are also largely positive. A smaller proportion of stakeholders is satisfied with environmental protection in NSW (58%) than is satisfied with the EPA's overall performance (67%), but satisfaction with environmental protection is higher among stakeholders than among the general population (40%). Given that stakeholders are generally more informed about environmental protection, and have a closer relationship with the

¹² This difference is statistically significant for government stakeholders (from 56% in 2013 to 74% in 2016), while indicative (but not significant) for the other groups.

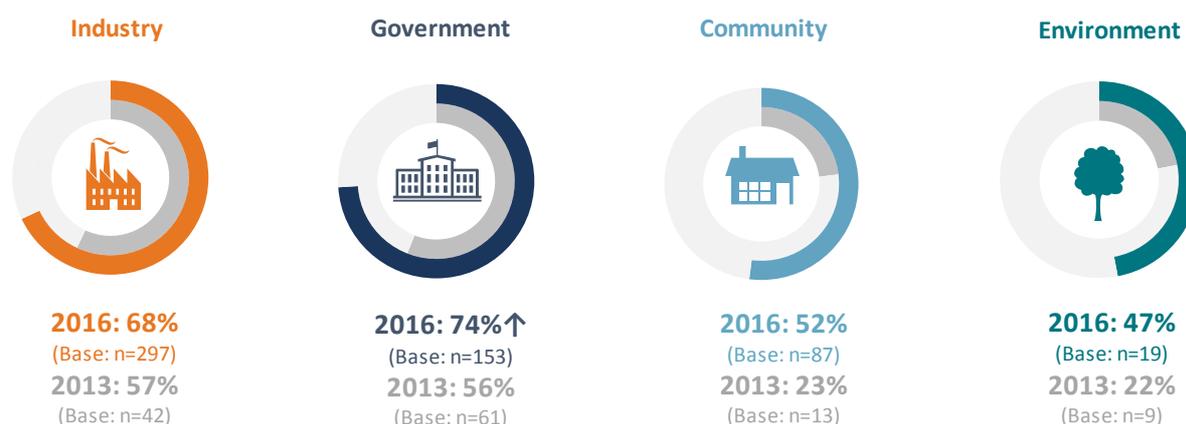
¹³ The relevant questions were not included in the 2013 survey.

EPA than the general population, more positive perceptions of environmental protection appear to be associated with each of these factors.

As in 2013, **sentiment is consistently more positive among government and industry stakeholders, and slightly less positive among environment and community stakeholders.** This trend appears for satisfaction with:

- The EPA’s overall performance (Figure 1)¹⁴;
- The level of environmental protection in NSW (Figure 2)¹⁵;
- Their interactions with the EPA (Figure 3)¹⁶; and
- The EPA’S communication methods.

Figure 1: Satisfied with the EPA’s overall performance, by stakeholder type



¹⁴ 74% of government stakeholders are satisfied with the EPA’s overall performance, and 68% of industry stakeholders, compared with 47% of environment stakeholders and 52% of community stakeholders.

¹⁵ 64% of government stakeholders are satisfied with the level of environmental protection in NSW, and 62% of industry stakeholders, compared with 26% of environment stakeholders and 38% of community stakeholders.

¹⁶ 76% of government stakeholders are satisfied with, and 73% of industry stakeholders, compared with 47% of environment stakeholders and 60% of community stakeholders.

Figure 2: Satisfied with the level of environmental protection in NSW (2016), by stakeholder type

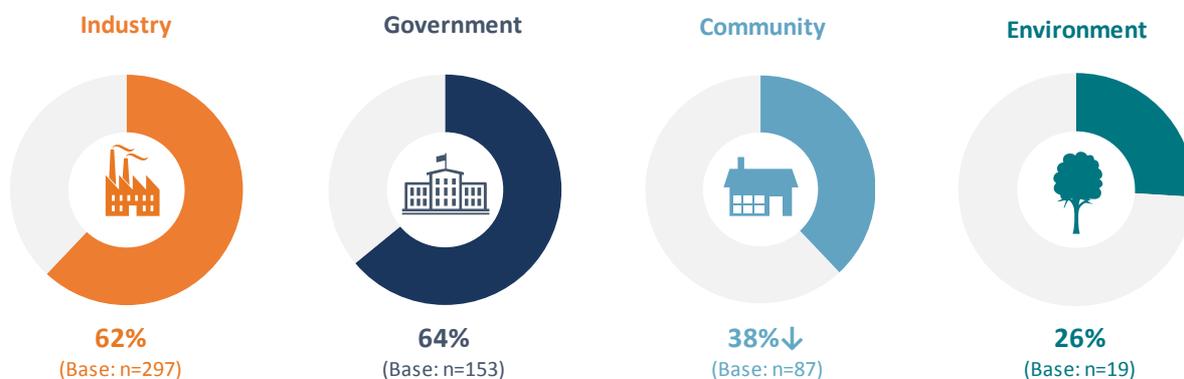
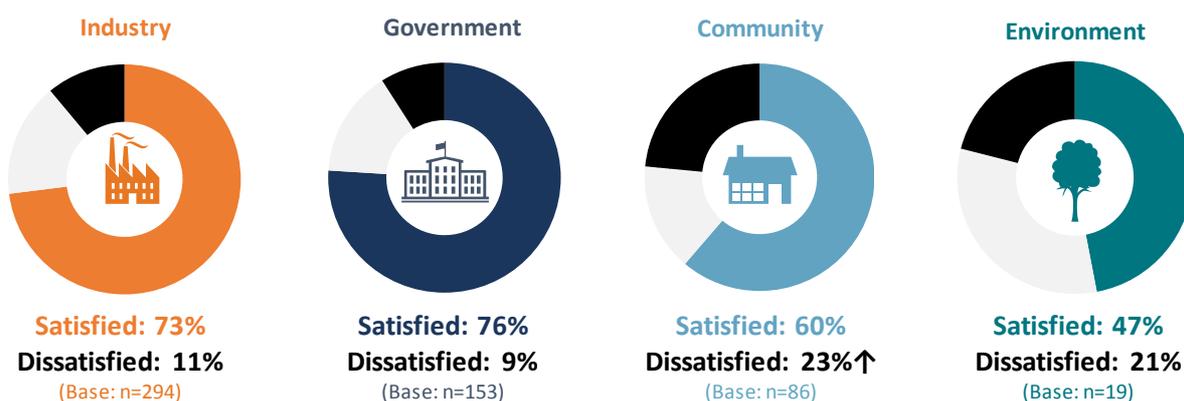


Figure 3: Satisfaction with interactions with the EPA (2016), by stakeholder type



Perceptions of the EPA’s attributes among stakeholders are similar to those of the general population. Stakeholders, however, are more likely to agree for each attribute, matching their more positive perceptions of the level of environmental protection in NSW (driven by greater knowledge and a closer relationship with the EPA). Levels of agreement are consistent with those in 2013, and while there remains room for improvement in general, the EPA is typically well-perceived among its stakeholder base.

As with the general population, **stakeholders generally have a positive view of the EPA’s leadership and effectiveness.** Most see the EPA as:

- Being an effective regulator (58% agree);

- Being quick to respond to issues and incidents (58%); and
- Having efficient and efficient staff (55%).

Similarly, a far greater proportion of stakeholders agree than disagree that the EPA is:

- A leader in environment protection (50% agree); and
- Efficient and effective in delivering outcomes (49%).

Perceptions of the EPA's conduct are also generally positive. The vast majority of stakeholders see the EPA as professional (78% agree). Most also see it approachable (72%), technically proficient (62%) and timely in its response to stakeholders and the community (52%).

Ratings for the EPA's credibility are similarly high. Most see:

- The information distributed by the EPA in the public domain as trustworthy (70% agree that this is so);
- The EPA as trustworthy and honest (68%);
- The EPA as independent and unbiased (61%);
- The EPA as open and transparent (54%);
- The EPA as objective in its decision making (54%).

Most also agree that the EPA explains its intended actions clearly (52%).

However, among stakeholders, **perceptions of innovation in the EPA are again less positive** than for other attributes. Relatively fewer stakeholders agree that the EPA is innovative (39%) or that it makes best use of online services to improve convenience and efficiency (47%), but being innovative is also seen as the least important of all potential attributes for the EPA to demonstrate.¹⁷

¹⁷ 72% of stakeholders see being innovative as either *essential* or *high priority* for the EPA. In comparison, all other attributes recorded figures of 90% and above.

However, perceptions have improved in this area since the 2013 survey, and perceptions of information access are mostly positive, as evidenced by the fact that:

- Most know where to go to get information they need from the EPA (67% agree that they do); and
- Most agree that the EPA is making it easier to access information about their services (59%).

Expectations of the NSW EPA

General population

Key findings

The regulation of many environmental issues is now perceived as lower priority by the general population than in 2013. The highest priority issues, however, remain unchanged.

Many environmental regulation issues are now perceived as less important by the general population than they were in 2013. The highest priority environmental regulation issues for the general population relate to pollution and are unchanged since 2013 (water pollution, hazardous materials and industrial chemicals and contaminated land sites)¹⁸.

Stakeholders

Key findings

Stakeholders believe it is most important that the EPA is **credible, professional, and impartial**. An independent and unbiased EPA is now of greater importance to stakeholders than in 2013, as is innovation at the EPA.

The qualities that stakeholders view as most important for the EPA to display continue to relate to its **credibility**¹⁹, **professionalism**²⁰, and **impartiality**²¹. The impartiality of the EPA remains a key

¹⁸ 78% of participants felt that water pollution was *essential or high priority*, 76% thought the issues of hazardous materials and industrial chemicals was *essential or high priority* (76%); and 72% thought the issue of contaminated land sites was *essential or high priority*.

¹⁹ 95% of stakeholders see it as *essential or very important* that the EPA is trustworthy and honest; 93% that it is open and transparent.

²⁰ 95% of stakeholders see it as *essential or very important* that the EPA is well informed; 93% that it is professional.

²¹ 93% of stakeholders see it as *essential or very important* that the EPA is objective in its decision making; 93% that it is independent and unbiased.

concern of stakeholders, and it is viewed as even more important now than in 2013 that the EPA is independent and unbiased.²² **Innovation** by the EPA is considered less important but this has increased significantly since 2013²³.

Communication, information, consultation and engagement

Key findings

- The EPA is the organisation the general population would be most likely to contact regarding the majority of environmental issues. However, local councils remain the preferred source of information for waste-related issues.
- Stakeholders are generally satisfied with their interactions with the EPA. Similarly, ratings of the EPA's information provision are generally positive, and stakeholders acknowledge that improvements are taking place in this area.
- Interest in using online sources to interact with the EPA is very high among both the general population and stakeholders. There is an opportunity for the EPA to improve its level of engagement with both audiences through social media.
- There are also opportunities to improve the online services the EPA offers to the general population and to increase subscriptions to the EPA newsletter.

General population

Despite the general population's lack of detailed knowledge about the EPA (mentioned in the 'Knowledge of the EPA' section above), **the EPA is the organisation they would be most likely to contact for information about the majority of environmental issues**. This suggests that the 'environment protection' aspect of the EPA brand may influence the general population's perceptions of its responsibility for environmental issues.

²² Having risen from 88% rating this as *essential* or *very important* to 93% in 2016.

²³ Having risen from 61% in 2013 to 72% in 2016.

However, in cases where the EPA's role is less visible to the public, other agencies are preferred as conduits for information. Waste and noise are the two issues where this effect is demonstrated.

Local councils remain the preferred source of information about waste-related issues: waste management and recycling (68%, compared with 19% for the EPA), littering (65%, compared with 15%) and illegal dumping (64%, compared with 22%). In addition to being most likely to contact their local council for these, the general population prefer the EPA to provide information about waste disposal and recycling via councils (43%).²⁴ ²⁵ Similarly, for excessive noise, the general population would be more likely to contact both their local council (42%) or NSW Police, Fire and Rescue (44%), rather than the EPA (16%).

Interest in continuing to receive information from the EPA through these sources is also high. When asked how they prefer the EPA to communicate with them, participants were most likely to select *news stories in the media* for a range of issues:

- How the EPA is protecting the environment in NSW (35%);
- Air quality (37%);
- Coal seam gas (36%); and
- Hazardous chemicals (38%).

However, interest in using online sources to interact with the EPA is also high. While participants tend to prefer *receiving* information from the EPA through traditional media forms, online formats are preferred in situations where there is a need to contact the EPA.²⁶ Additionally, as mentioned, substantial proportions selected the *EPA website* and *Facebook* as preferred methods for the EPA to communicate with them.

²⁴ That is, they would prefer to receive this EPA information through their council, rather than through direct EPA sources.

²⁵ In addition, local council was the second most commonly selected option for illegal waste dumping (35%).

²⁶ For each of the following issues, participants would prefer to contact the EPA via the *online contact form on the EPA website*: to report pollution (40%); to report illegal waste dumping (37%); to report littering from a vehicle (32%); to find information about a pollution incident in their area (38%); and to find information about disposing of household chemicals (40%).

There appears to be an opportunity to improve the online services the EPA offers to the general population. While there is considerable interest in using online services to interact with the EPA, less than one-third of the community agree that the EPA is making best use of online services to improve access to information (30%).²⁷

Stakeholders

Stakeholders are generally satisfied with their interactions with the EPA. There is high satisfaction with both their interactions (71%) and the communication methods used in these (77%). Far greater proportions of stakeholders agree than disagree that the EPA:

- Consults meaningfully with stakeholders (49% agree, compared with 16% who disagree);
- Provides opportunities for them to contribute to issues they are interested in (52%, compared with 13%); and
- Allows adequate time for consultation with stakeholders (53%, compared with 14%).

Highlighting the importance of effective engagement, **stakeholders are more likely to be satisfied with the EPA's overall performance if they are satisfied with the EPA's communication methods**²⁸. Similarly, stakeholders are more likely to be dissatisfied overall if they are not satisfied with the EPA's communication methods.^{29 30}

In addition to this, the qualitative research revealed that some environment groups feel that the EPA is not listening to and involving them sufficiently in decision-making processes. It also showed that there is an appetite for the EPA to be more proactive in engaging with stakeholders.

²⁷ The same proportion neither agree nor disagree with this statement (30%).

²⁸ 85% of those satisfied with their communication methods are also satisfied with the EPA's performance overall.

²⁹ 76% of those dissatisfied with their communication methods are also dissatisfied with the EPA's performance overall.

³⁰ Satisfaction ratings with interactions are lower among environment and community stakeholders. Matching their lower satisfaction with both interactions and the methods used in these interactions, environment and community stakeholders are less likely to: trust the information the EPA distributes in the public domain (53% and 49%, compared with 80% and 72%); and perceive the EPA as trustworthy and honest (42% and 46% respectively, compared with 74% for government and 73% for industry).

Ratings of the EPA's information provision are generally positive, and stakeholders acknowledge that improvements are taking place in this area. Two in three participants agree that they know where to go to get the information they need from the EPA (67%; with 11% disagreeing). Additionally, most feel that the EPA is making it easier to access information about its services (59%).

In particular, stakeholders are typically positive in their ratings of the EPA website. Among those who have used it in the past 12 months, 70% of stakeholders rated it at least 'good,' and a far greater proportion agree than disagree that the EPA makes best use of online services to improve convenience and efficiency (47% agree, while 14% disagree).³¹

As with the general population, **some stakeholders are interested in engagement with the EPA through social media.** Two-fifths of stakeholders use social media as a source of information in general (41%), with Facebook being the most used platform (32%). However, in the past 12 months, very few stakeholders have interacted with the EPA through social media (7%). There is an appetite for greater interaction via this method. Around half of those who use social media for information are interested in interacting with the EPA through this medium (48%, which is 20% of all stakeholders). Additionally, in the qualitative research, some stakeholders mentioned that they had noticed an increased EPA presence on **social media**. Many of these participants felt, however, that the EPA should continue to increase its use of social media with stakeholders.

Community and environment stakeholders are the most open to the use of social media. More than half of these groups use social media as an information source (55% and 63% respectively).

There is also an opportunity to increase subscriptions to the EPA newsletter. Interest in subscribing is high, whereas current subscription rates are relatively low. While only 32% of all stakeholders reported that they are currently subscribe, 81% said that they would subscribe if the EPA offered them the opportunity to receive regular news updates by email. In addition, the qualitative research showed that the EPA's newsletter is highly valued among those who are subscribe. These participants often felt that there would be benefit in promoting and distributing the newsletter more widely.

³¹ However, it should be noted that the agreement figure for this statement was lower than for many of the other statements posed to stakeholders in the survey, as discussed earlier in this summary.

The EPA's approach to regulation

Key findings

- Stakeholders generally see the EPA as taking appropriate regulatory action where needed.
- However, there are concerns among environment and community stakeholders that it is not taking enough regulatory action.
- Some expressed a view that the EPA is too rigid in its application of guidelines.
- There are ongoing challenges for the EPA in striking a balance between the concerns of environment and community stakeholders and those of industry in relation to regulatory action.
- There is still a perception in some quarters that the EPA is regulating inconsistently across different geographical areas and staff levels.

Matching positive perceptions of the organisation's performance overall and specific aspects of its conduct (discussed previously), **stakeholders generally see the EPA as acting appropriately as a regulator**. A greater proportion of stakeholders agree than disagree that the EPA takes appropriate regulatory action where needed: half agree (51%), while 15% disagree.

However, there is concern among environment and community stakeholders that the EPA is not taking enough regulatory action. Half of environment stakeholders and a quarter of community stakeholders believe this to be the case (47% and 24% respectively).³²

Perceptions among industry stakeholders are markedly different; most are comfortable with the level of regulatory action the EPA undertakes. However, there is concern among a small proportion (6%) of businesses that the EPA is taking too much action. In line with this, the qualitative research found that some industry stakeholders take the view that they are over-regulated, and that regulations are becoming increasingly complex and challenging.

Some stakeholders involved in the qualitative research expressed a view that the EPA is too rigid in its application of guidelines. This rigidity is seen to stifle innovation (preventing trials and novel

³² In comparison, 10% of government stakeholders believe this to be the case, and none of the industry stakeholders (0%).

solutions) and compromise the partnership style relationship that they want the EPA to have with stakeholders.

As might be expected, community stakeholders are more likely than others to think that the EPA works too closely with industry (45%)³³, and industry stakeholders are the most likely to think that the EPA is too influenced by environmental groups (35%). However, in both cases, these attitudes are held by a minority of each of the stakeholder groups.

Despite perceptions among some that the EPA's approach to regulation is inflexible, the EPA is still perceived as regulating inconsistently across different geographical areas and staff levels. This was also the case in 2013. Slightly more stakeholders agree that staff across all levels of the EPA have a similar approach to regulation (31%) compared to the proportion who disagree (26%). Consistency is the only attribute that is seen by stakeholders as being both important³⁴ and not strongly associated with the EPA.³⁵

³³ Community and environment stakeholders are also less likely than overall to feel that the EPA takes appropriate regulatory action where needed (34% and 37% agree that it does respectively).

³⁴ A rating of 4.5 or above out of 5, where 5 represents essential and 4 represents very important.

³⁵ A mean rating of 3.5 or more out of 5, where 5 represents strongly agree, 4 represents tend to agree and 3 represents neither agree nor disagree that it is an EPA attribute.

The EPA as partner, protector and leader

Key findings

- The findings show that it is important for the EPA to play a partnership role, rather than strictly one of enforcement. There is support across all stakeholder groups for the EPA to work closely with them in order to be an effective regulator.
- Similarly, stakeholders also deem the level of influence of environmental groups on the EPA's actions as appropriate.
- The protector role is seen as fundamental to the EPA's function by all stakeholder groups and therefore highly appropriate for the EPA to maintain.
- There are contrasting views about how the EPA should approach its leadership role and whether it is appropriate for the EPA to have a voice beyond its core regulatory role. A substantial proportion of stakeholders across all groups either have mixed thoughts about the EPA's leadership qualities, or do not feel sufficiently informed about the organisation to make a judgement.

The research with stakeholders included questions relating to the three pillars of the EPA's role: partner (with communities, government and businesses, to reduce impacts on the environment); protector (holding people and organisations to account through licensing, monitoring, regulation and enforcement), and leader (providing leadership and initiatives to protect our air, waterways, land and the health of the community for the future).

The findings show that stakeholders generally feel that it is important for the EPA to **play a partnership role with stakeholder groups, rather than acting strictly as an enforcer**. There is support across all stakeholder groups for the EPA to work closely with industry in order regulate effectively (84% of all stakeholders agree that this is important). This includes environment (58%) and community (61%) stakeholders.

The qualitative research supports this finding. It showed that there is strong support for the EPA to work as a partner, as long as balance and independence are maintained. **There is a preference among all stakeholder groups for increased partnership with the EPA**, especially among community and environment groups, industry associations, and businesses. These groups currently feel that the EPA is not partnering with them to the extent that it could be.

The protector role is seen as fundamental to the EPA's function. The qualitative research showed that stakeholders see it as highly appropriate that the EPA maintain this role. In many cases, they see protection of the environment as the EPA's core responsibility and the main reason for its existence.

There are contrasting views about how the EPA should approach its leadership role and whether it is appropriate for the EPA to have a voice beyond its core regulatory role. While half of stakeholders see the EPA as a leader in environment protection (50%), nearly a third *neither agree nor disagree* that this is the case (31%). This suggests that while stakeholders are generally positive towards this prospect, many either have mixed thoughts about the EPA's leadership role, or do not feel sufficiently informed about the organisation to make a judgement.

In the qualitative research, most agreed that the best way that the EPA can play a leadership role is by demonstrating its technical expertise on the environment and by modelling best practice. Participants who disagreed that it is currently in such a position mentioned that the organisation needs to raise its profile in doing so.

Recommendations

The research findings have led to a number of recommendations for the EPA to consider, some of which are an update of the recommendations that arose from the 2013 stakeholder research.

Recommendation 1: Continue to clearly communicate the EPA's role to stakeholders and the community

Recommendation 2: Continue to ensure consultation with stakeholders is meaningful

Recommendation 3: Continue to communicate the EPA's approach to compliance

Recommendation 4: Continue to communicate how the EPA ensures appropriate levels of staffing and access to expertise

Recommendation 5: Progress the role of the EPA as partner, protector and leader in key messaging

Recommendation 6: Grow the EPA presence and raise its profile using a variety of media and multiple communication channels

A number of other recommendations that arose from the 2013 research are still viewed as important and relevant to the EPA's work. The EPA is perceived as having made significant improvements in these areas. They are considered as important to maintain on an ongoing basis in order to maintain its high performance and meet stakeholder expectations, but they are not key areas for particular focus based on the 2016 research findings. These recommendations are as follows:

- Ensure that the EPA understands and manages stakeholder expectations around the timeliness of responses to submissions and enquiries.
- Ensure that the EPA understands and manages stakeholder expectations around responsiveness to submissions and enquiries.
- Continue to be as transparent as possible in all transactions and communications with stakeholders.
- Continue to demonstrate how the EPA balances competing stakeholder priorities and evidence in the compliance process.