

# Understanding Stakeholder Trust in Queensland's Coal Seam Gas Industry

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## 1. Research questions

- ✓ What are the **key drivers of trust** in the CSG companies and industry from the perspective of each core stakeholder group?
- ✓ What **type and level of trust** do stakeholders hold in the CSG companies and the industry? Where are the priority areas for trust?
- ✓ In what ways are the key drivers of trust **similar and different** across the **stakeholder groups**?
- ✓ **Which stakeholder groups are most active and salient** in influencing trust in the industry?
- ✓ What do stakeholders' perceive to be **critical for building and maintaining trust** in the CSG companies and industry going forward?

## 2. Research Methods

**Phase 1: In-depth interviews with 145 stakeholders** (Q3 2013 & Q3 2014)

**Phase 2: Online survey with 561 stakeholders** (Q1-Q2, 2015)

**Five Stakeholder Groups :**

1. Landholders
2. Community Members
3. Influencers (community & regional leaders)
4. Industry Regulators
5. CSG Employees and Contractors

NB: 50% of participants identified with one or more groups

## 3. Phase 1 Interview Results

**Key drivers of stakeholder trust and distrust:**

1. Integrity & Transparency
2. Competence & Efficiency
3. Communication & Interaction
4. Co-existence
5. Shared vs. Divergent Identity
6. Community Impact and Contribution
7. Comparative Reputation
8. Power Differential
9. Environmental concerns
10. Governance & Regulation
11. Uncertainty & Unpredictability



## 4. Phase 2 Preliminary Survey Results

**Stakeholder groups differ in their trust of CSG companies:**

- Employees & contractors reported high trust.
- Regulators reported moderate trust.
- Community and Influencer groups are split: significant proportions reported low trust and significant proportions reported high trust.
- Landowners reported low trust.

**Trust in the industry is dynamic:**

- 61% reported changes in trust over time.
- Employees, regulators and influencers reported similar levels of increased and decreased trust over time.
- Landowners and community members were more than twice as likely to report decreased than increased trust.

**Stakeholder groups perceive the industry differently:**

- The majority (68-72%) of employees perceive the industry to be trustworthy and well governed/regulated, compared to a minority (5%-39%) of external stakeholders.
- The majority of external stakeholders (64-88%) reported concerns over the environmental effects of CSG, in contrast to a minority of employees (30%).

## 5. Ongoing Project Activities

- ✓ Statistical analysis of key drivers of trust
- ✓ Identify stakeholder recommendations for how industry and regulators can enhance trust in the sector
- ✓ Complete a publicly available report
- ✓ Presentations to industry, regulators and regional groups
- ✓ Journal publications to follow