### 1. Research Questions

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

### 2. Methods

- **In-depth interviews with 145 stakeholders** (Q3 2013; Q3 2014)
- **Online survey with 561 stakeholders** (Q1-Q2, 2015)

**Five Stakeholder Groups:**
1. Landholders
2. Community Members
3. Regional Leaders
4. Industry Regulators
5. CSG Employees (including contractors)

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

### 3. Survey Results

**Stakeholders differ in their trust of CSG companies:**
- Landowners reported low trust (M=2.2, 1-7 scale).
- Community members and Regional leaders are polarised: significant proportions reported low trust and significant proportions reported high trust (M=3.6 to 3.7).
- Regulators reported moderate trust overall, reflecting equal proportions of low, moderate and high trust (M=3.9).
- Employees and contractors reported high trust (M=5.6).
- Statistical analyses (ANOVA) revealed that employees report higher trust than all other stakeholder groups, whereas landholders report lower trust than all other groups.
- External stakeholders perceive the companies highest on competence and lowest on integrity.

**Stakeholders perceive the CSG industry differently:**
- The majority (67-72%) 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 report concerns over the environmental effects of CSG (68-94%), perceive the industry to be too focused on the short-term rather than the long-term (66-93%), and to be unpredictable and uncertain (70-76%), in contrast to a minority of employees (37-44%)

**Trust in the industry is dynamic:**
- 61% reported changes in their trust over time.
- Employees, regulators and regional leaders 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.

### 4. Interview Results

**Key drivers of stakeholder trust and distrust:**
1. Integrity & Transparency
2. Communication & Interaction
3. Competence & Efficiency
4. Community Impact and Contribution
5. Co-existence
6. Shared Identity
7. Comparative Reputation
8. Environmental Concerns
9. Governance & Regulation
10. Unpredictability & Uncertainty
11. Power Differential

### 5. Priority Recommendations

- Build and maintain trust with **landholders**: access & compensation agreements, respect and co-existence
- Increase **transparency**: ‘honestly’ share information, plans and regulatory compliance, educate and show the facts
- Address **environmental** (and health) concerns
  - Minimise and report impact
  - Independent research to ‘prove its safe’
- Fulfil **commitments** and ‘honour agreements’
- Support and invest in local communities
- Improve effectiveness and impartiality of **governance, regulation, monitoring and enforcement**
- Enhance industry collaboration and sustainability
- Improve management of **contractors**