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