



**GISERA**  
Gas Industry Social and  
Environmental Research Alliance

# Social research

## Community wellbeing and local attitudes to conventional gas development in the south-east of South Australia

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**QGC**



**Santos**



Australian Government  
Department of Industry, Science,  
Energy and Resources



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**NORTHERN  
TERRITORY  
GOVERNMENT**



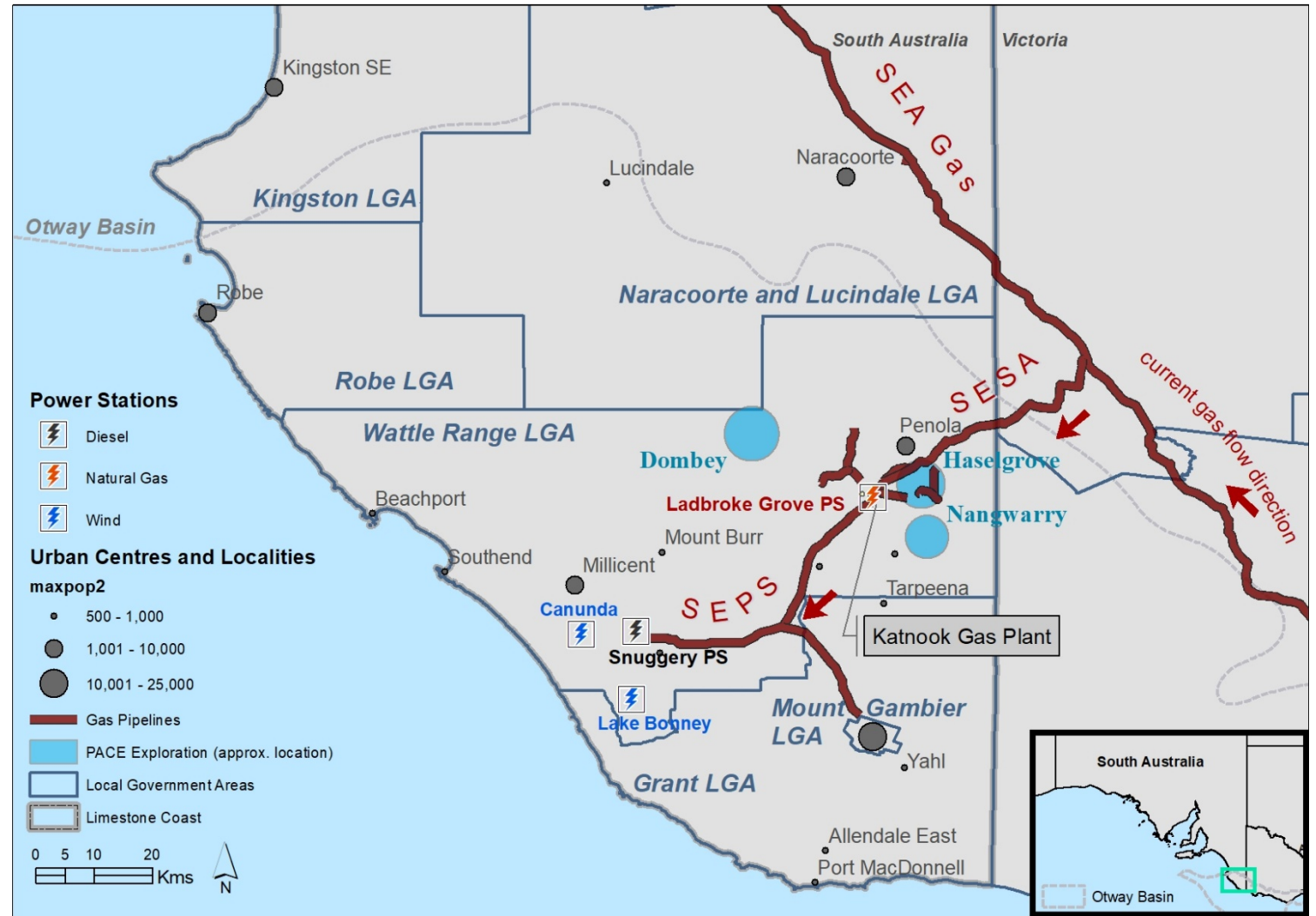
RESOURCES PTY. LTD.

# Background to the research

# Survey conducted Sept – Oct 2019

**SAMPLE:** 533 participants

- Three LGAs
  - Wattle Range, Grant, Mt Gambier
- Representative
  - Age, gender, LGA populations
- Landowners included
- Data-base landlines and mobile phones
- Randomly selected
- 24% response rate
- 35 minute telephone interview



# What we did in the survey research – an overview

# Telephone interview covered two main topics



1

**COMMUNITY WELLBEING**

2.

**LOCAL ATTITUDES &  
PERCEPTIONS OF CONVENTIONAL  
GAS DEVELOPMENT**

- Approx. 170 questions
- Questions developed from:
  - previous research
  - interviews with local stakeholders
  - findings from the Economic and Agriculture projects



# How to read the results

People identified themselves

- Millicent and surrounds
- Penola and surrounds
- Mt Gambier and surrounds

- Likert-type responses
- 1 = least to 5 = most
- Scores < 3 represent an unfavourable view
  - Except for perceived impacts - the higher the score the greater the concerns
- Average scores



# Community wellbeing

## RESULTS

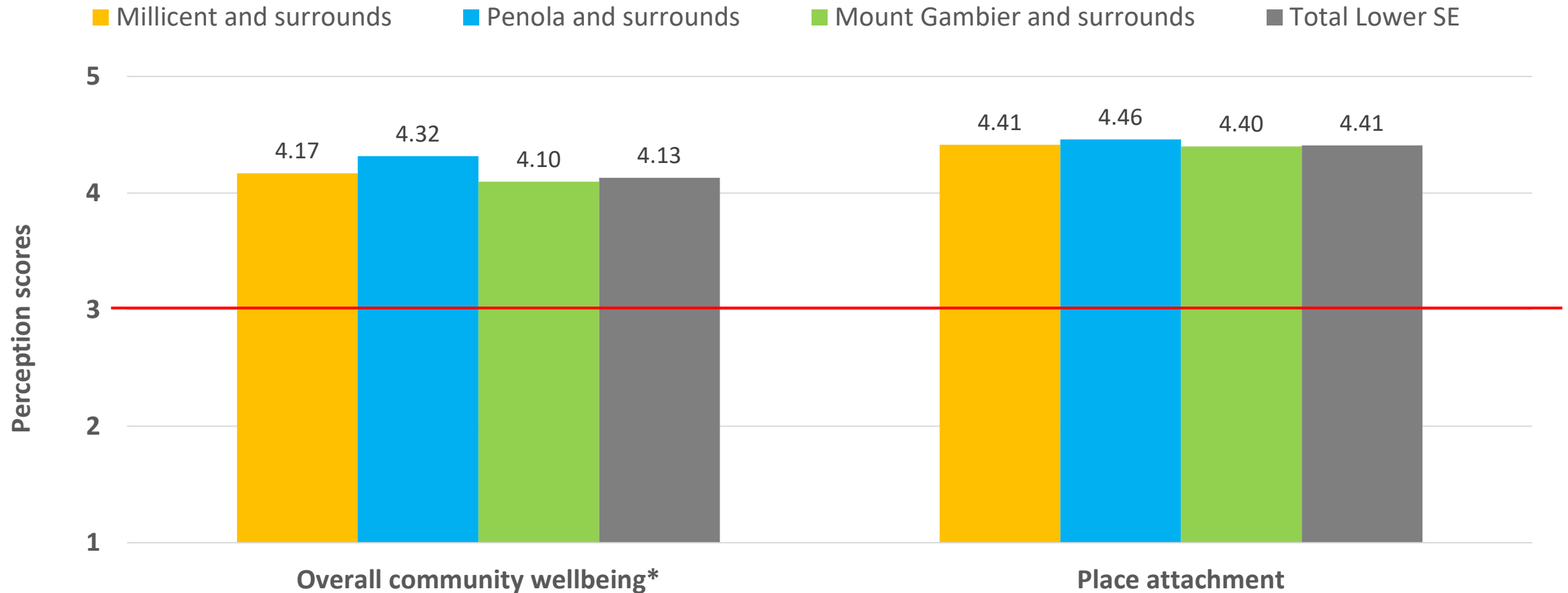
# Measuring CWB: 15 dimensions in six domains

- Multiple questions for each dimension



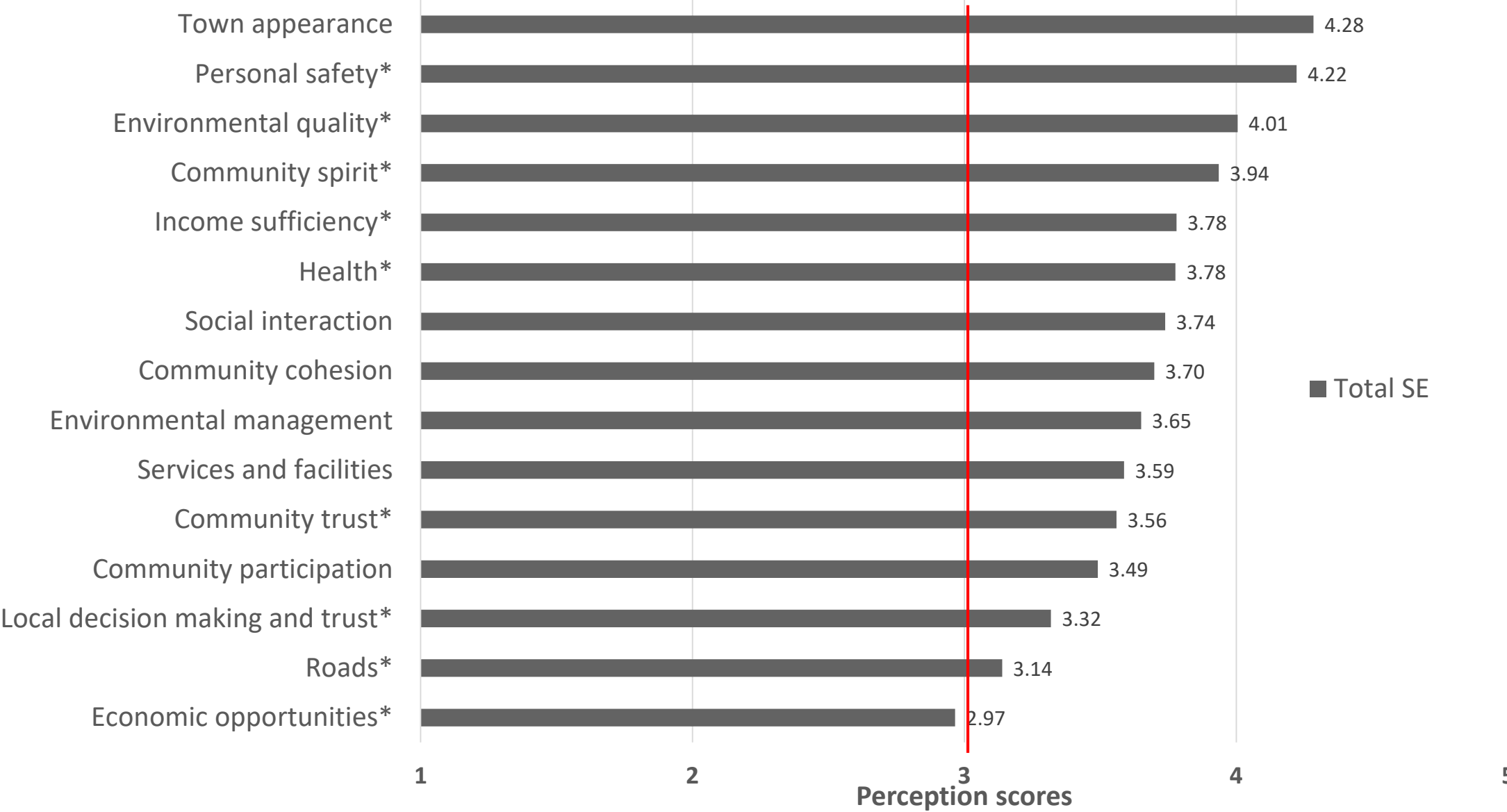


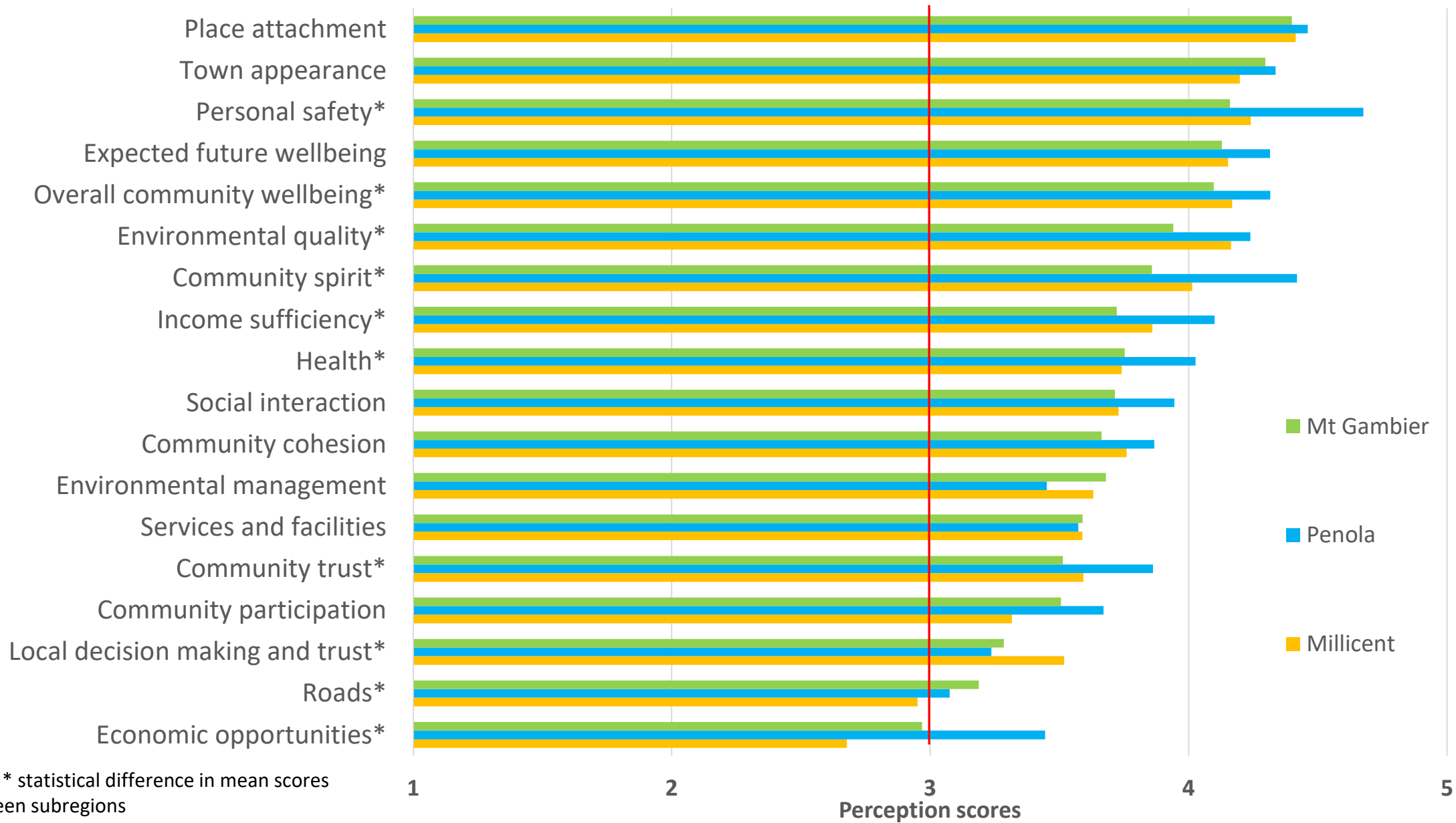
# Overall CWB and place attachment high across all subregions



Note: Scores: 1 = lowest and 5 = highest perception; scores < 3 indicate unfavourable perceptions;  
\* statistical difference in mean scores between subregions

# All CWB dimensions viewed favourably except economic opportunities



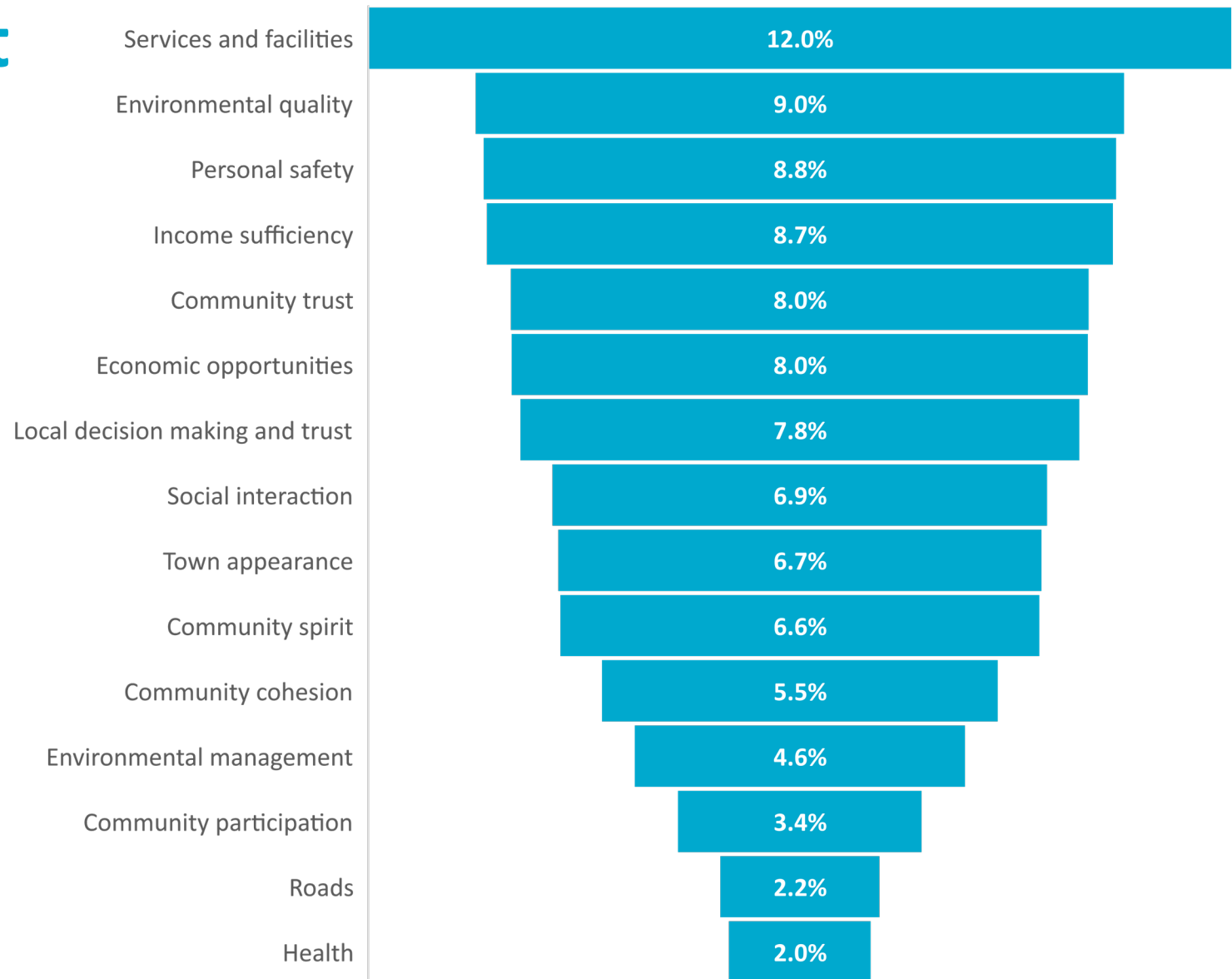


# What's most important to a sense of community wellbeing

## TOTAL SE REGION

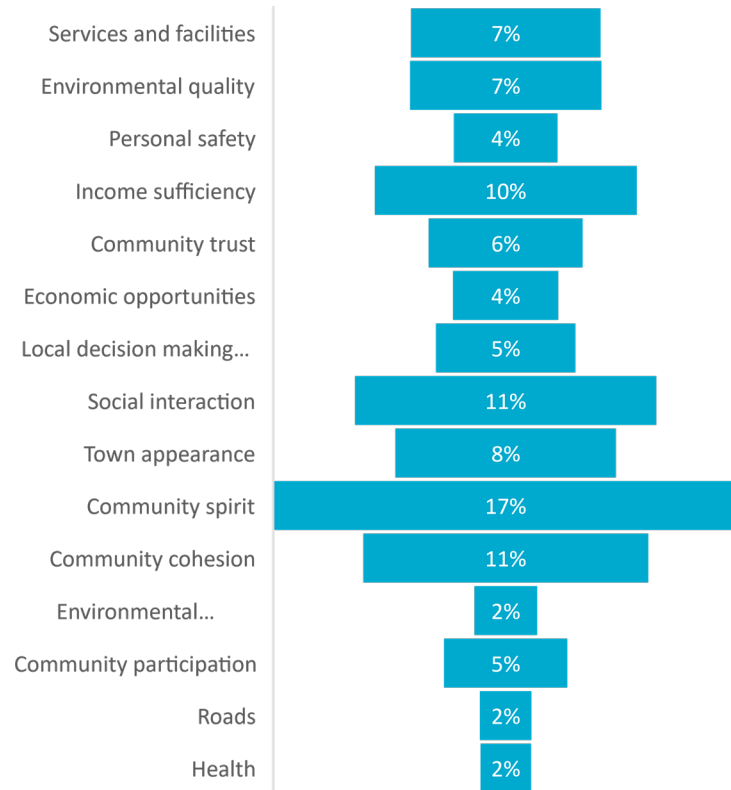
Top 4 contributors to CWB

- Services and facilities
- Environmental quality
- Personal safety
- Income sufficiency



# Considerable variation in relative importance of dimensions among subregions

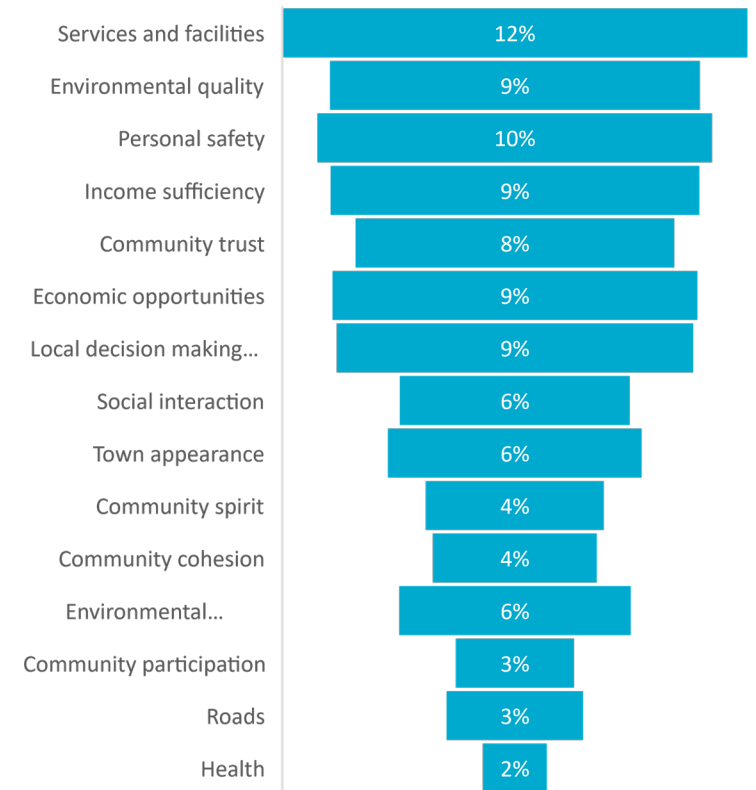
## Millicent



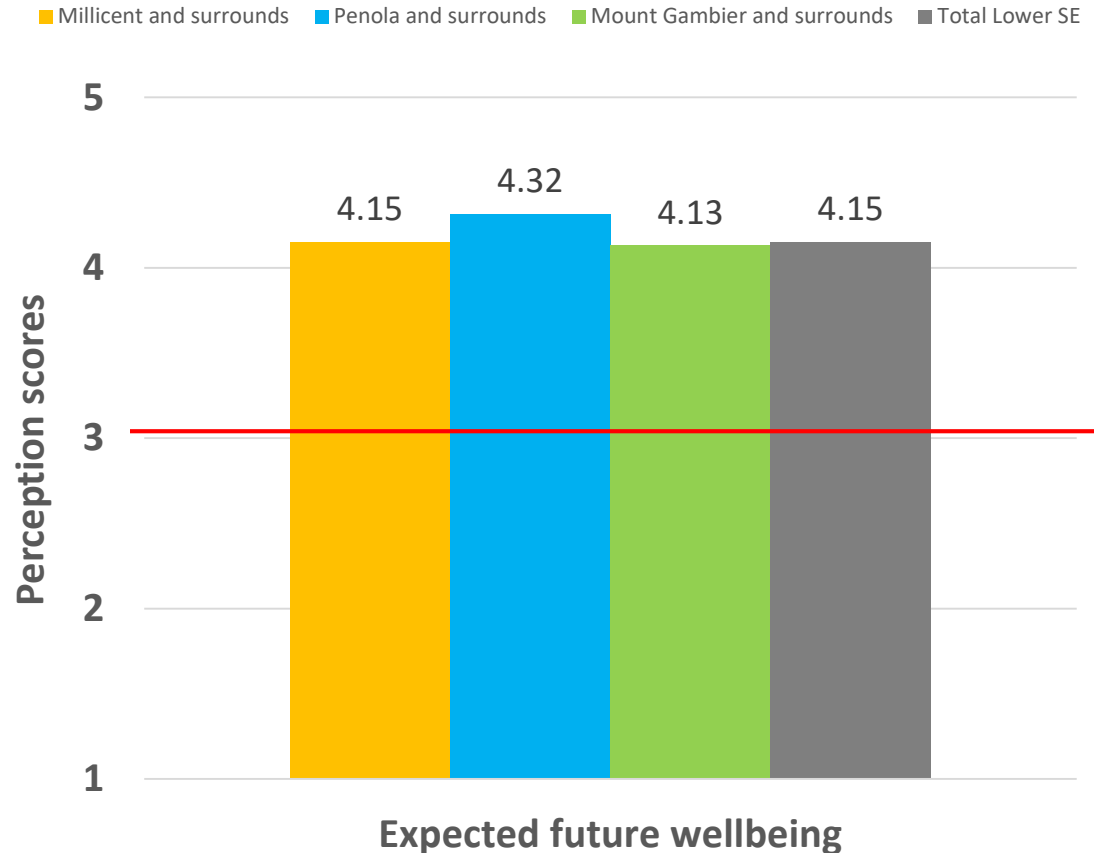
## Penola



## Mt Gambier



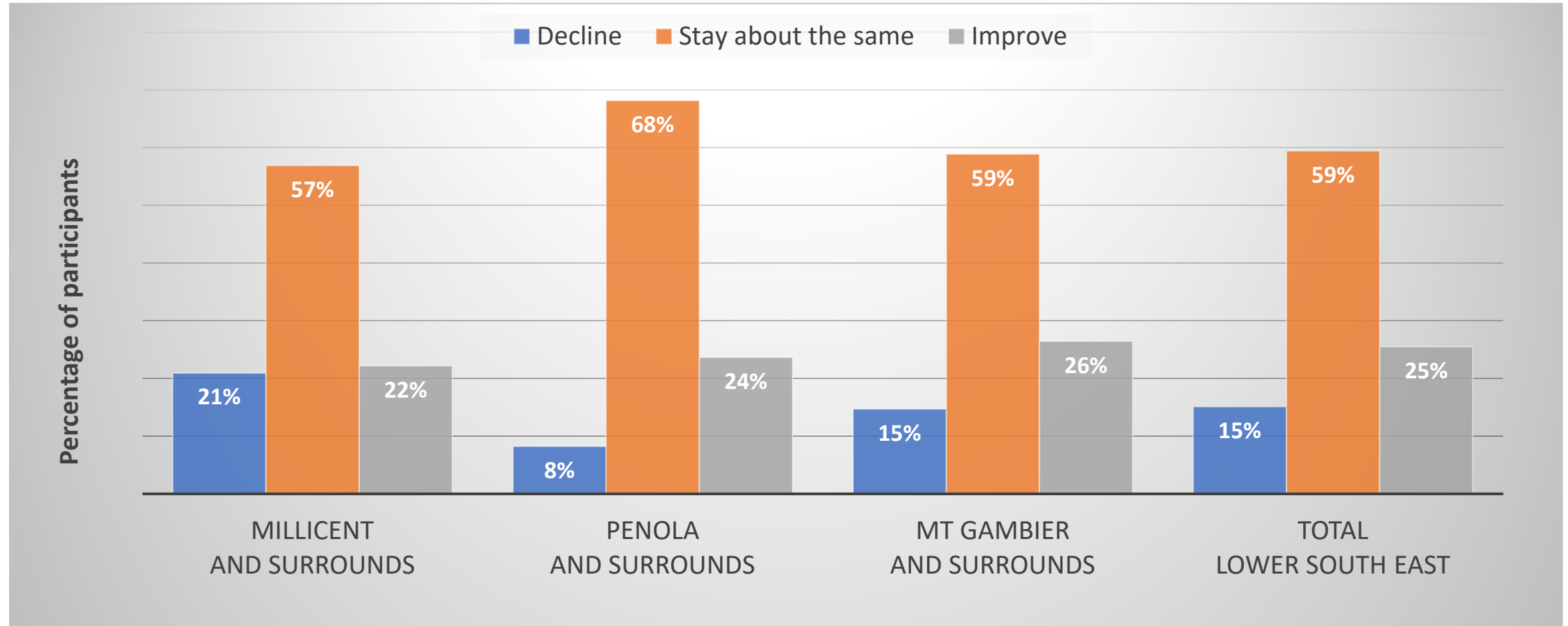
# Expected future wellbeing very robust



People's expectations were based on:

- Economic outlook
- Level of services and facilities
- Population effects
- Community spirit

# Penola the least pessimistic about future CWB

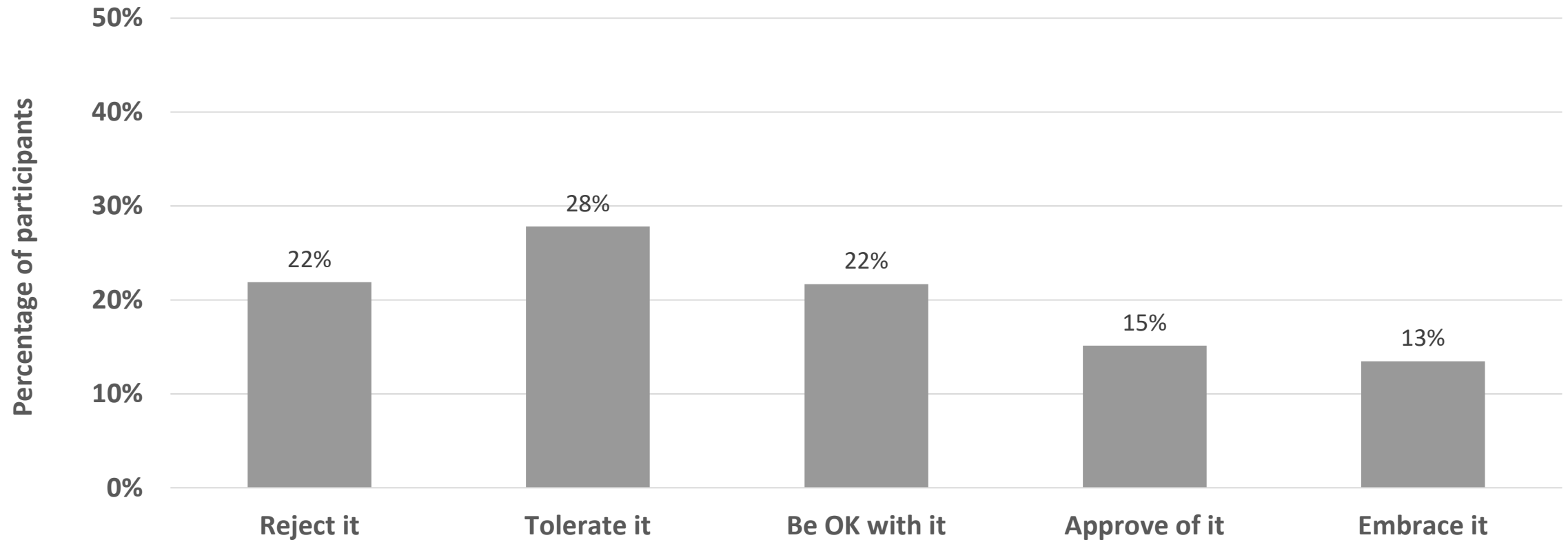


# LOCAL ATTITUDES & PERCEPTIONS OF CONVENTIONAL GAS DEVELOPMENT IN THE SE

## RESULTS

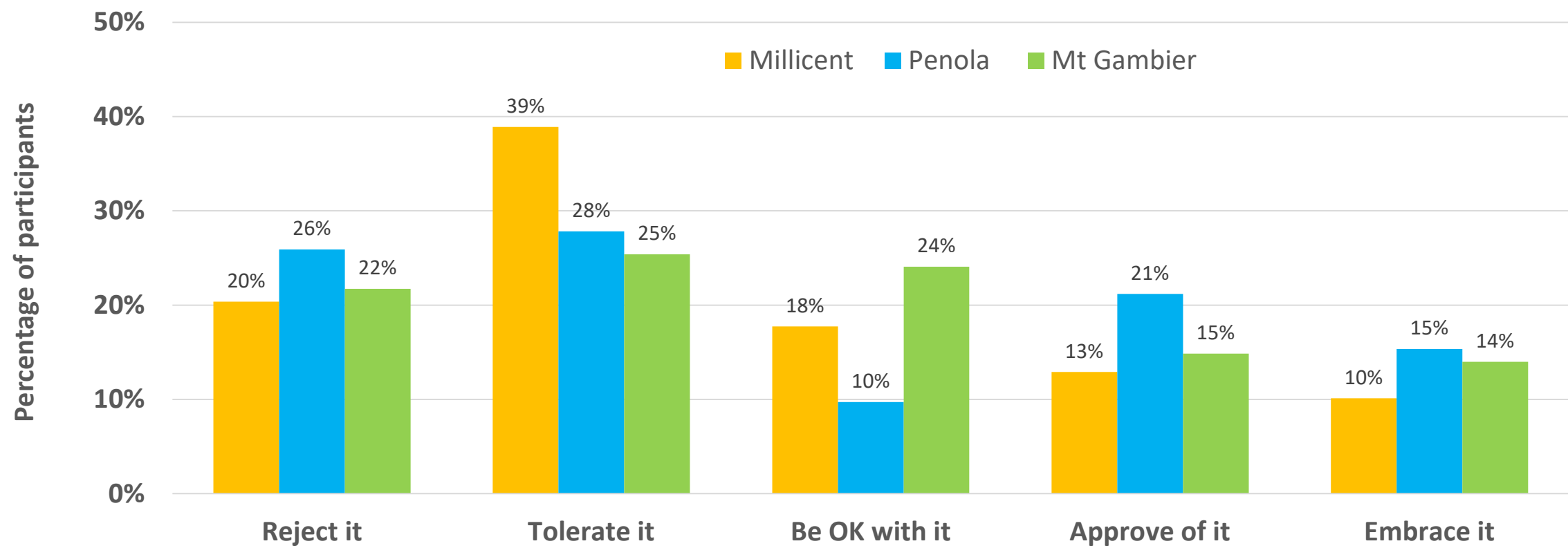


# Attitudes are diverse and vary across the region



Note: Percentages rounded to the nearest whole percent

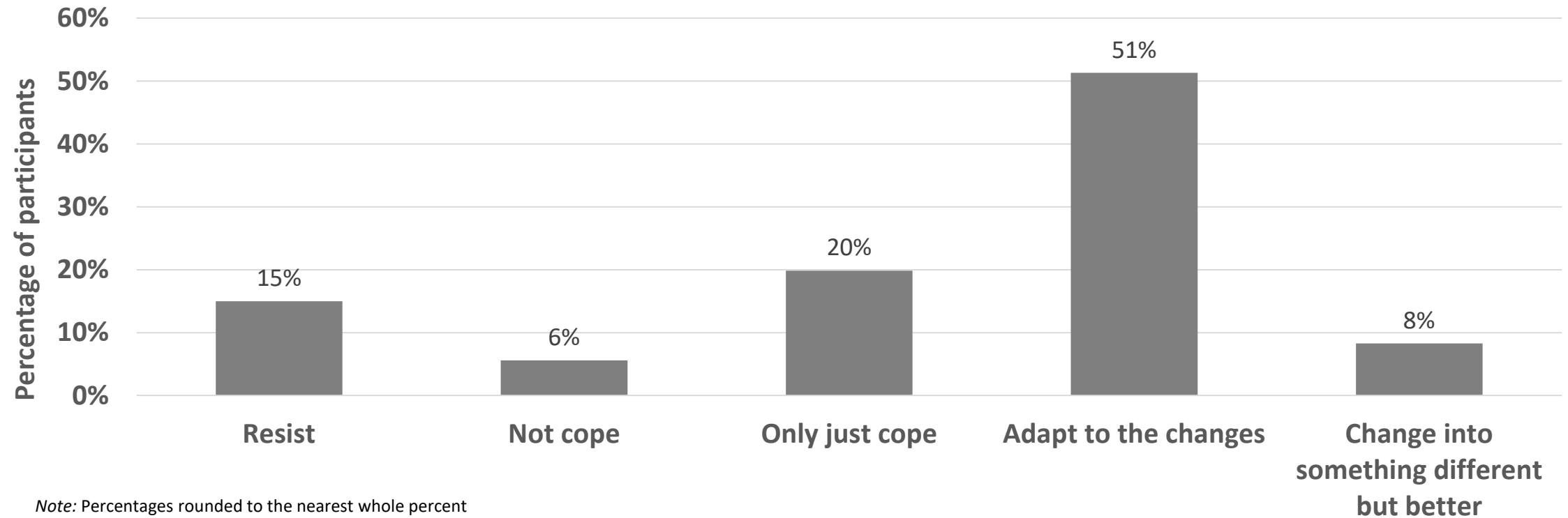
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Note: Percentages rounded to the nearest whole percent

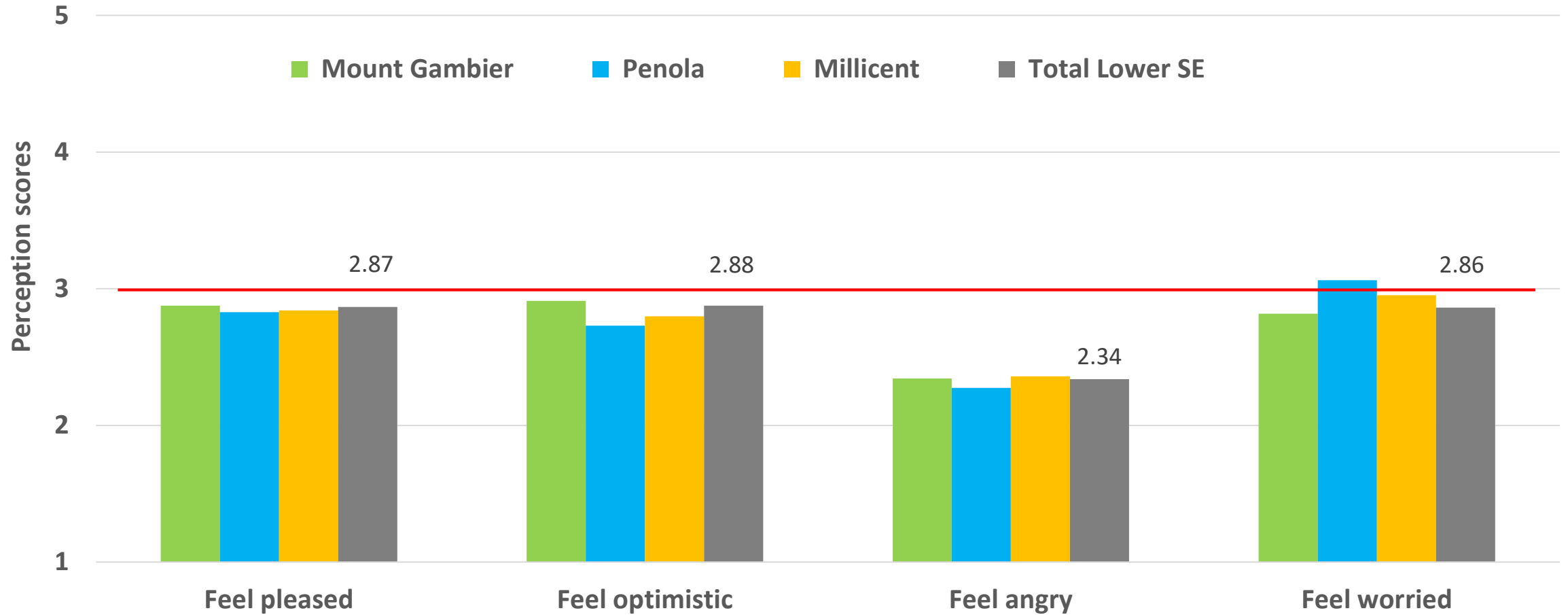
# Most people felt the region would adapt

How do you believe your community would respond to conventional gas development in the SE of South Australia? - choose one response

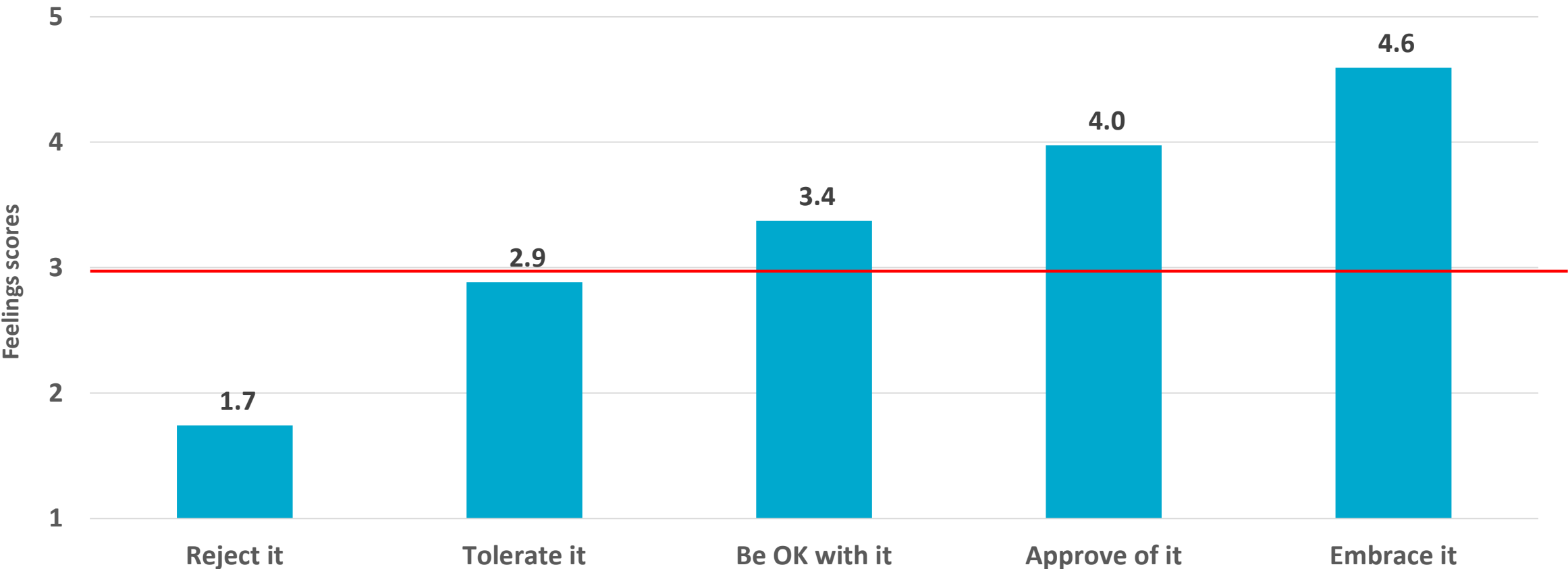


Note: Percentages rounded to the nearest whole percent

# People have fairly neutral feelings and are not angry

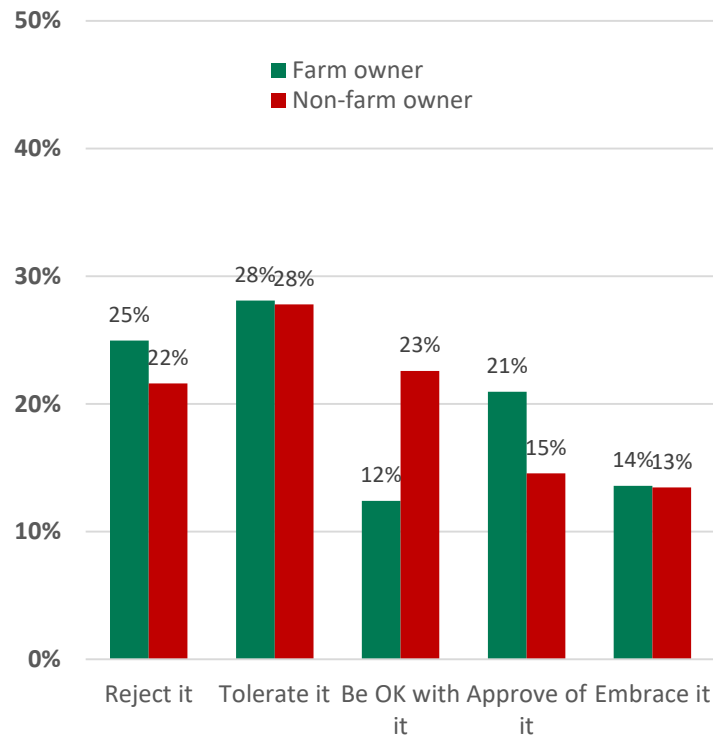


# Feelings scores for each attitude category helps understand the categories

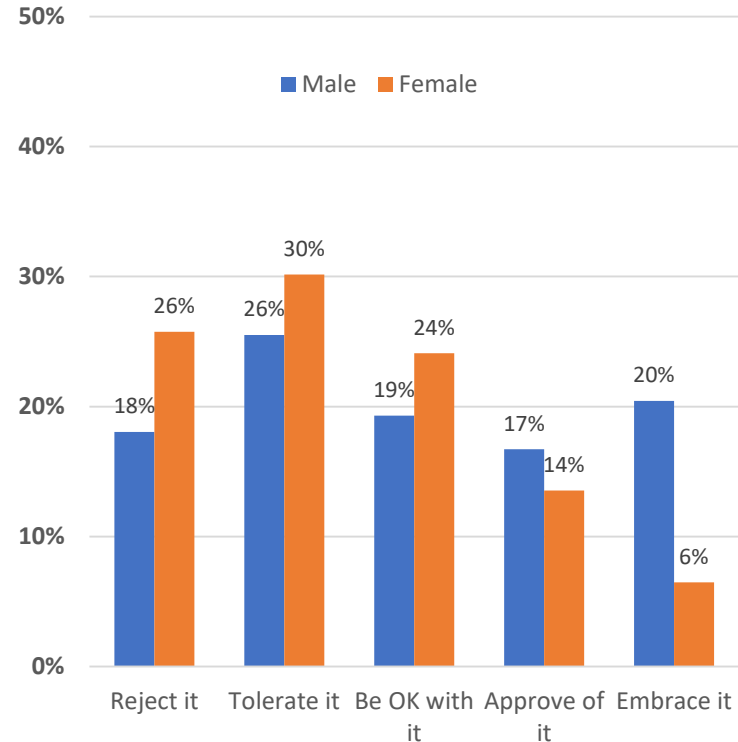


# Attitudes vary by farm ownership, by gender, and by income

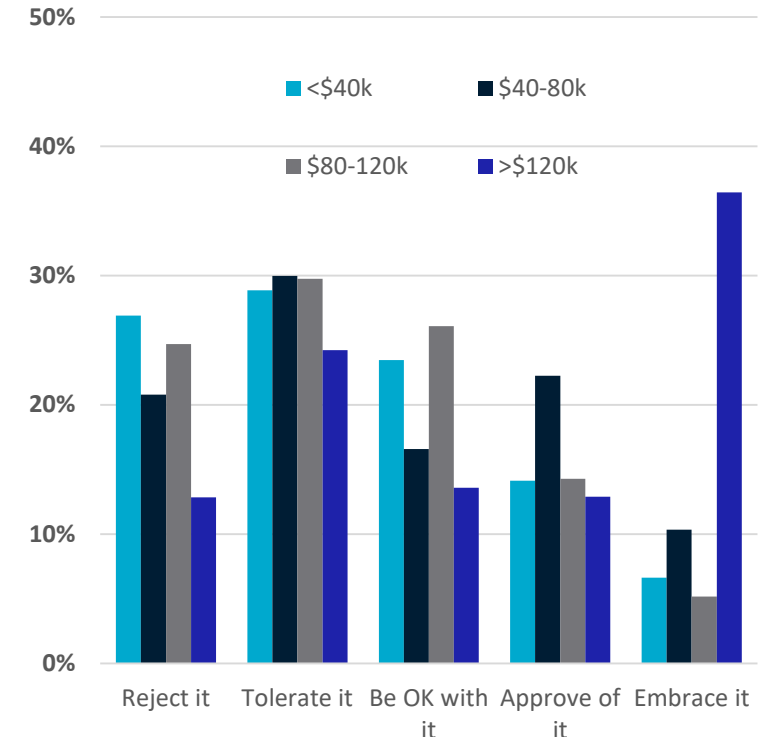
## Farmers



## Gender

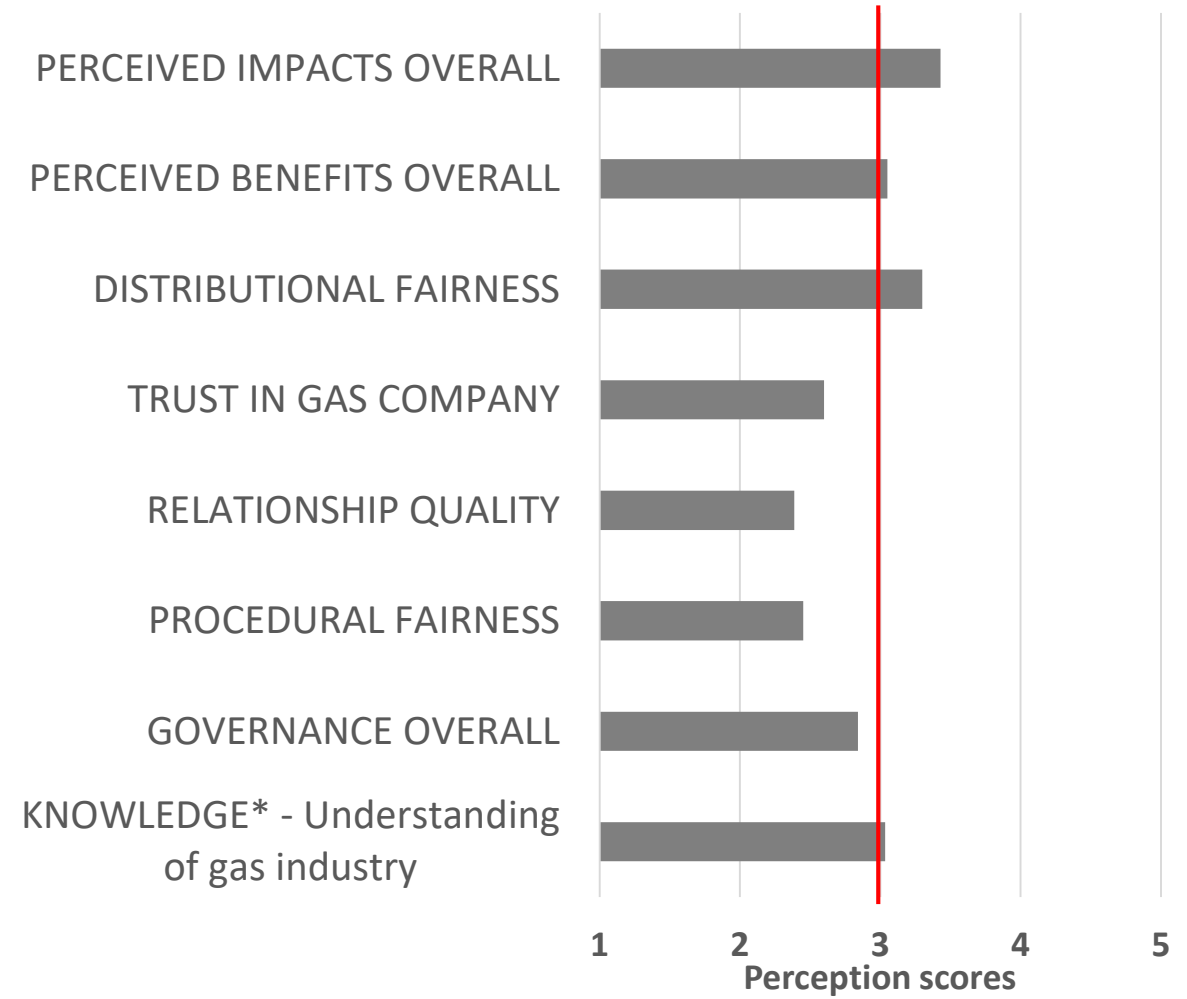


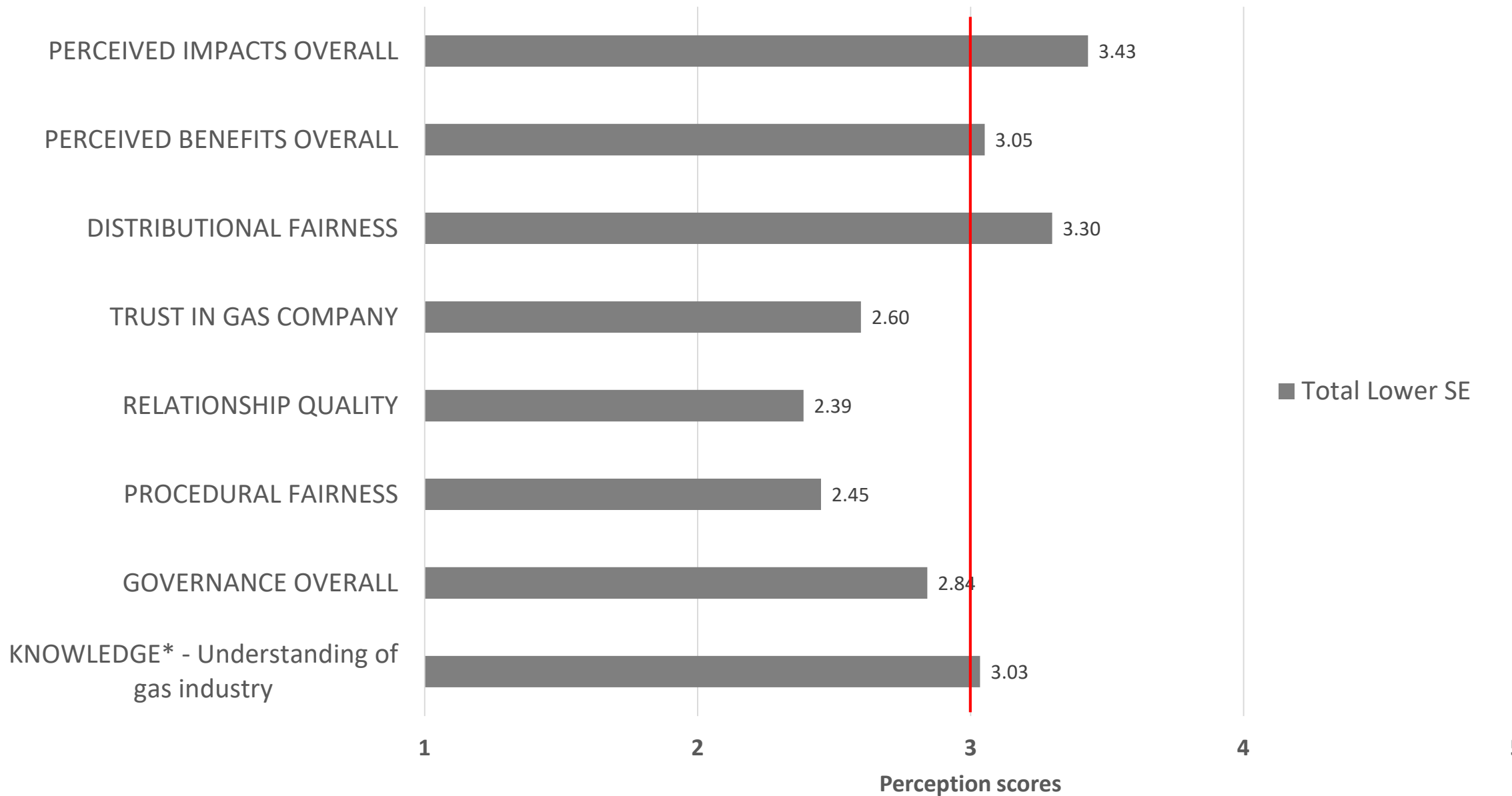
## Income



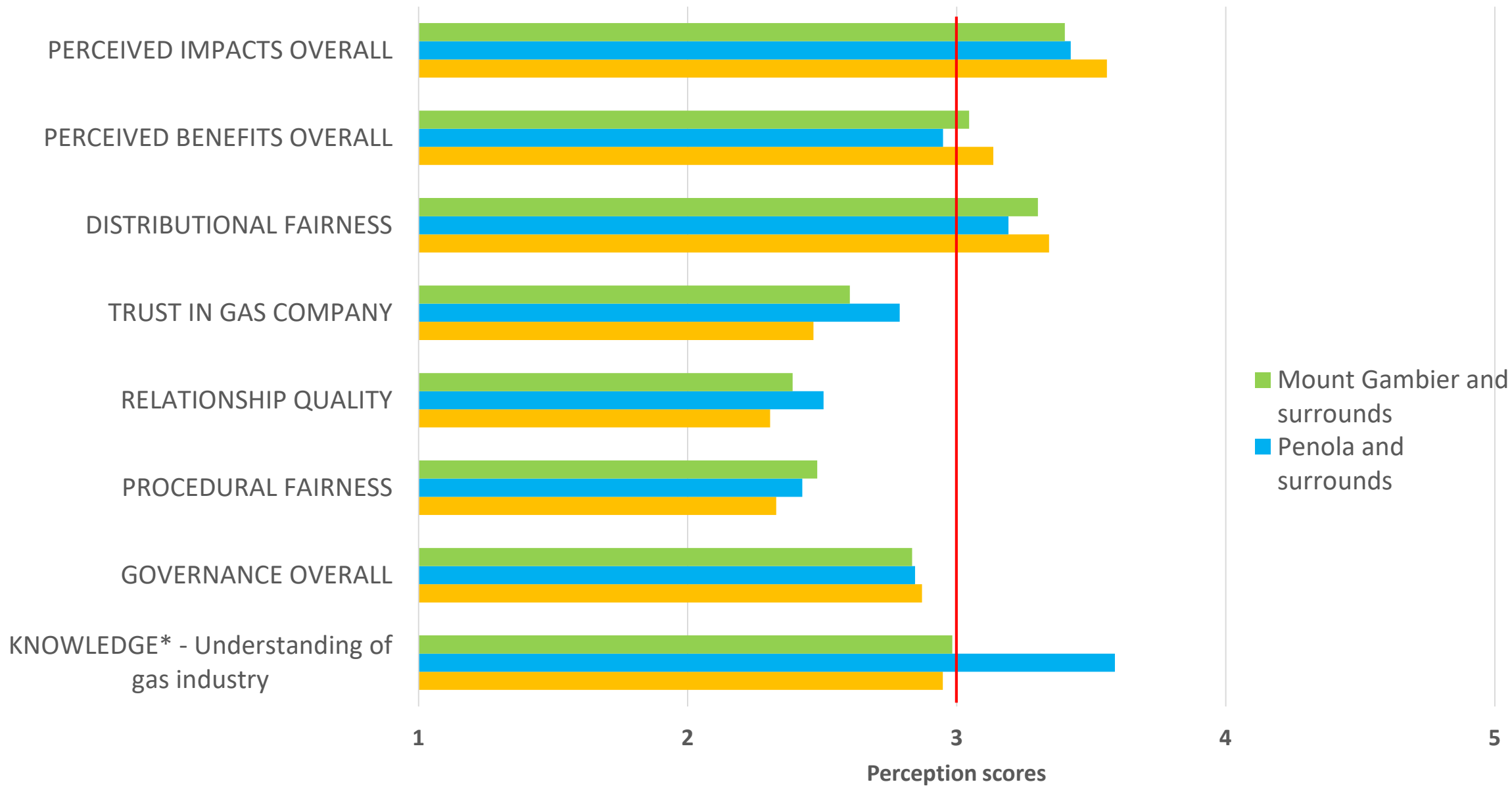
# What explains this diversity of views

1. How impacted
2. What are the benefits
3. Distributional fairness
  - how will benefits and impacts be shared
4. Trust in the gas industry
5. Relationship quality
  - btwn gas industry and community
6. Procedural fairness
7. Governance
8. Knowledge and understanding
  - Regulations, planning, engaging, trust

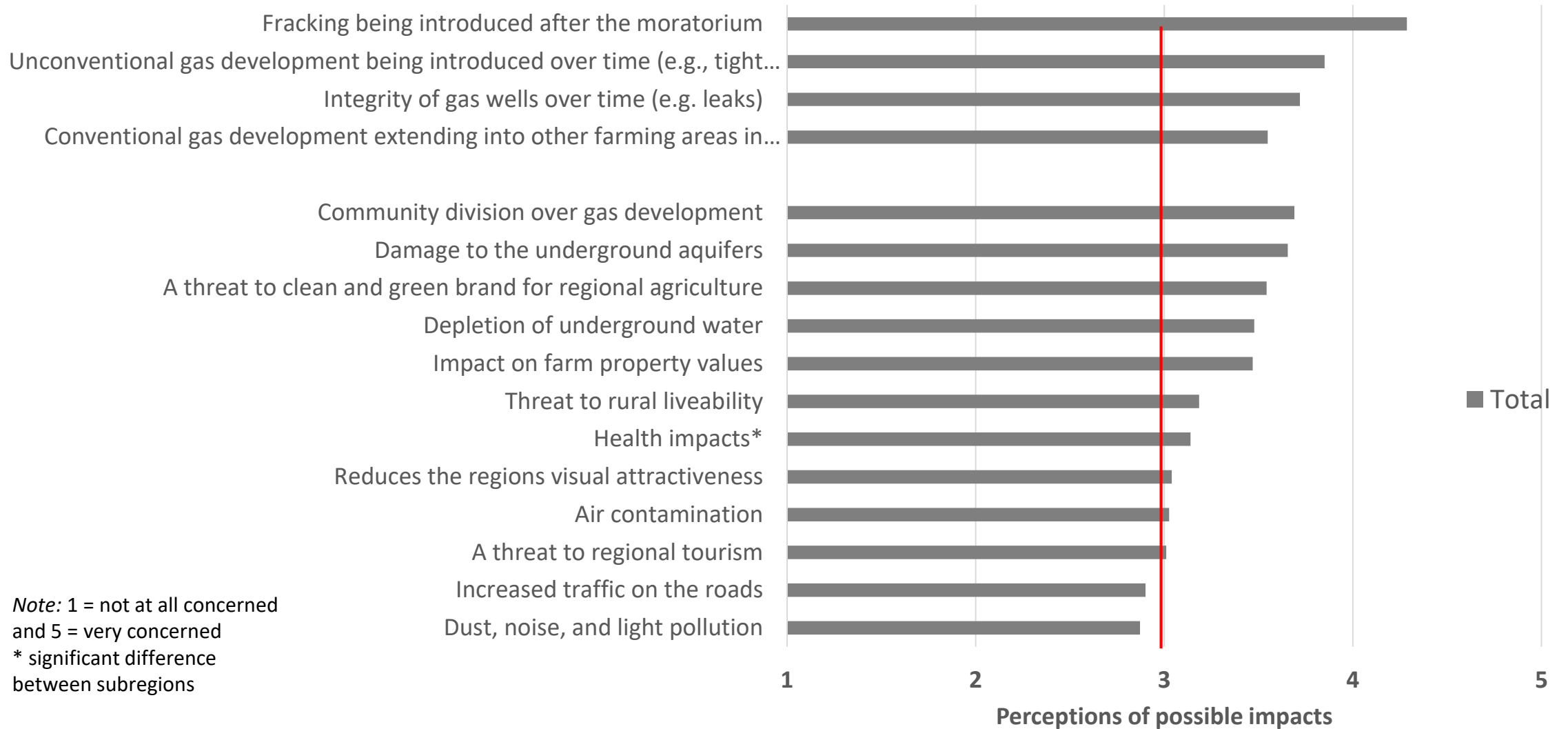








# Perceived impacts: people more concerned about future issues than immediate impacts



Note: 1 = not at all concerned  
and 5 = very concerned  
\* significant difference  
between subregions

# Risks are viewed as not very manageable

■ Total Lower SE

■ Mt Gambier and surrounds

■ Penola and surrounds

■ Millicent and surrounds

Are potentially disastrous

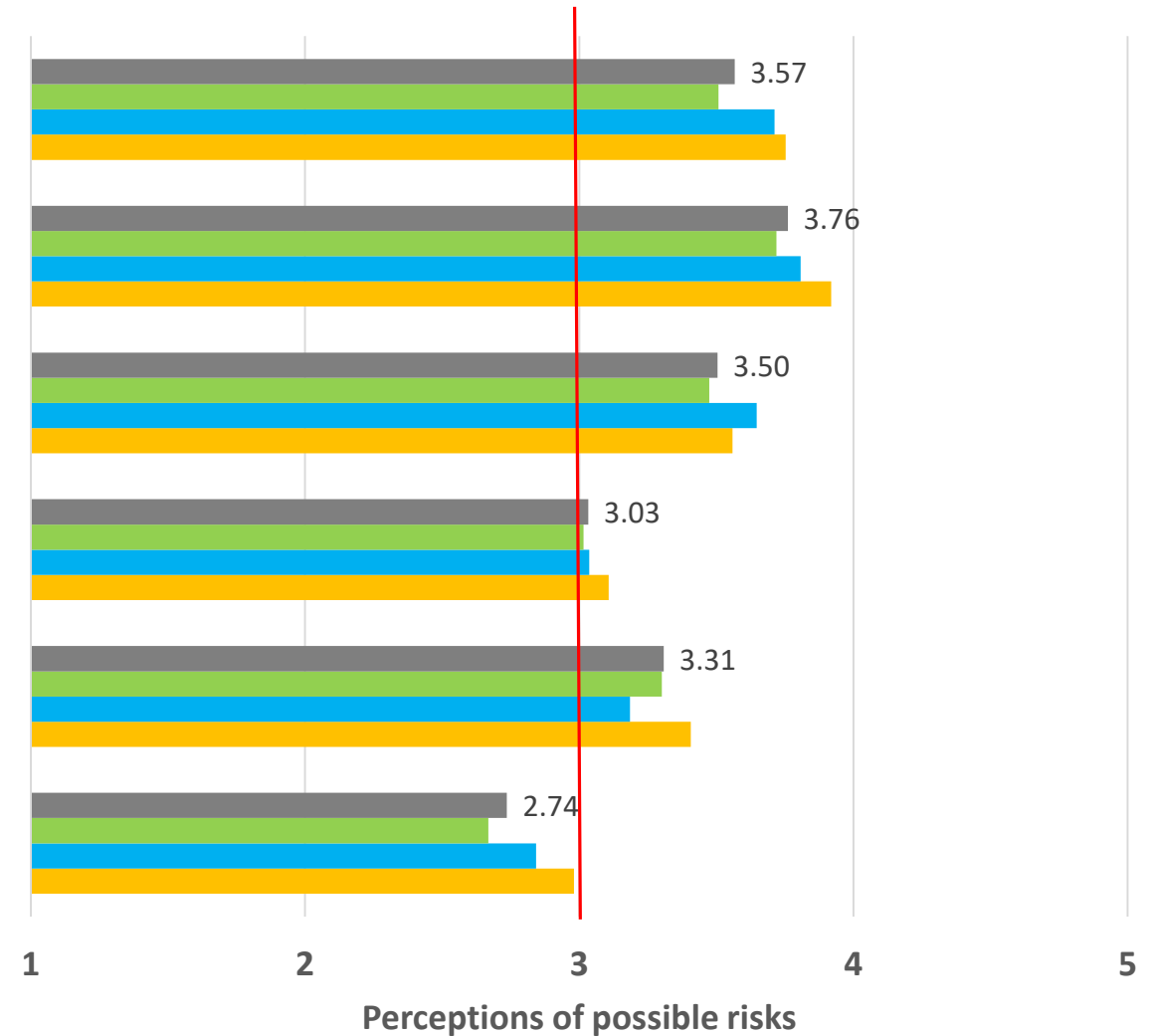
Can adversely affect future generations

Have potentially uncontrollable impacts

Are manageable

Are understood by science

Are understood by the community\*



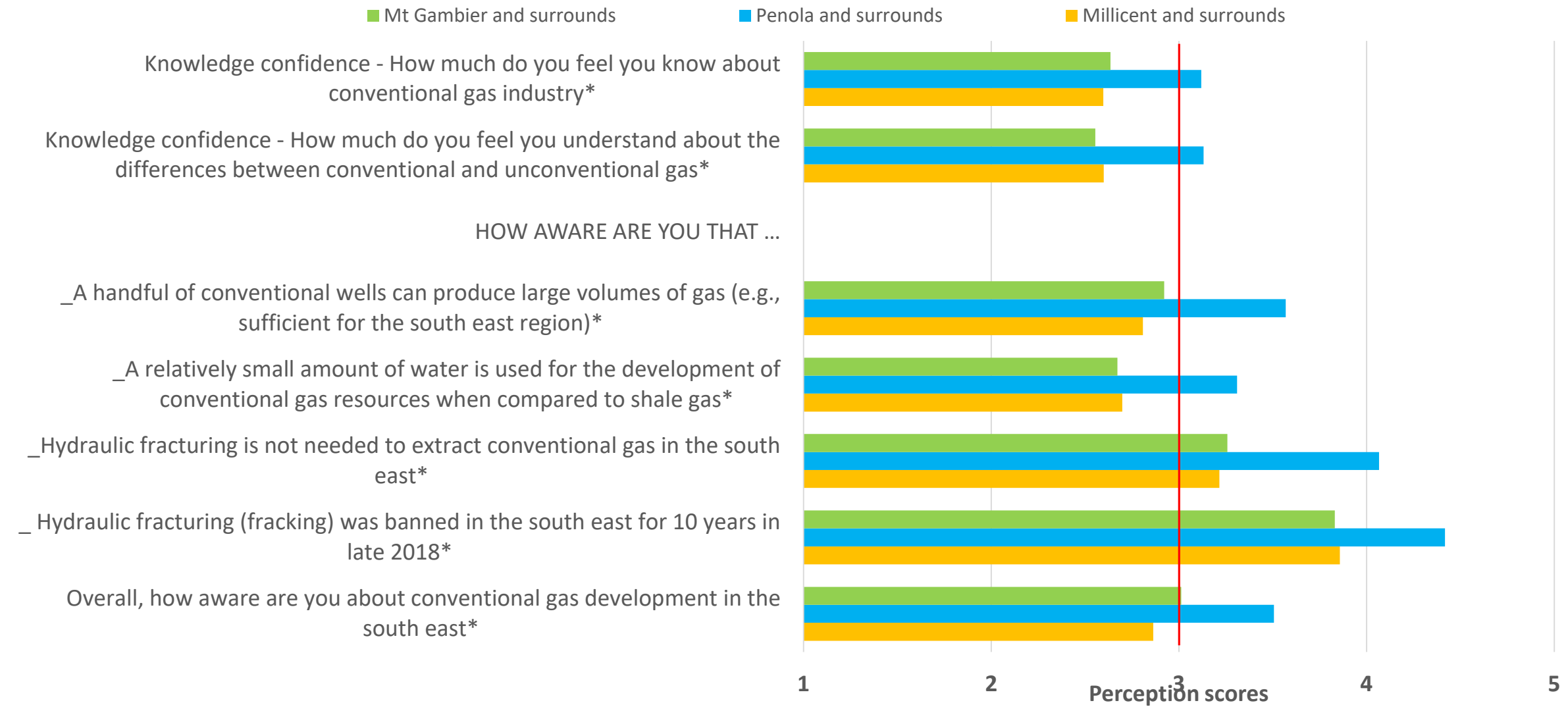
Note: 1 = Strongly disagree and 5 = Strongly agree

\* significant difference between subregions

# Perceived benefits: people only see the benefits as modest



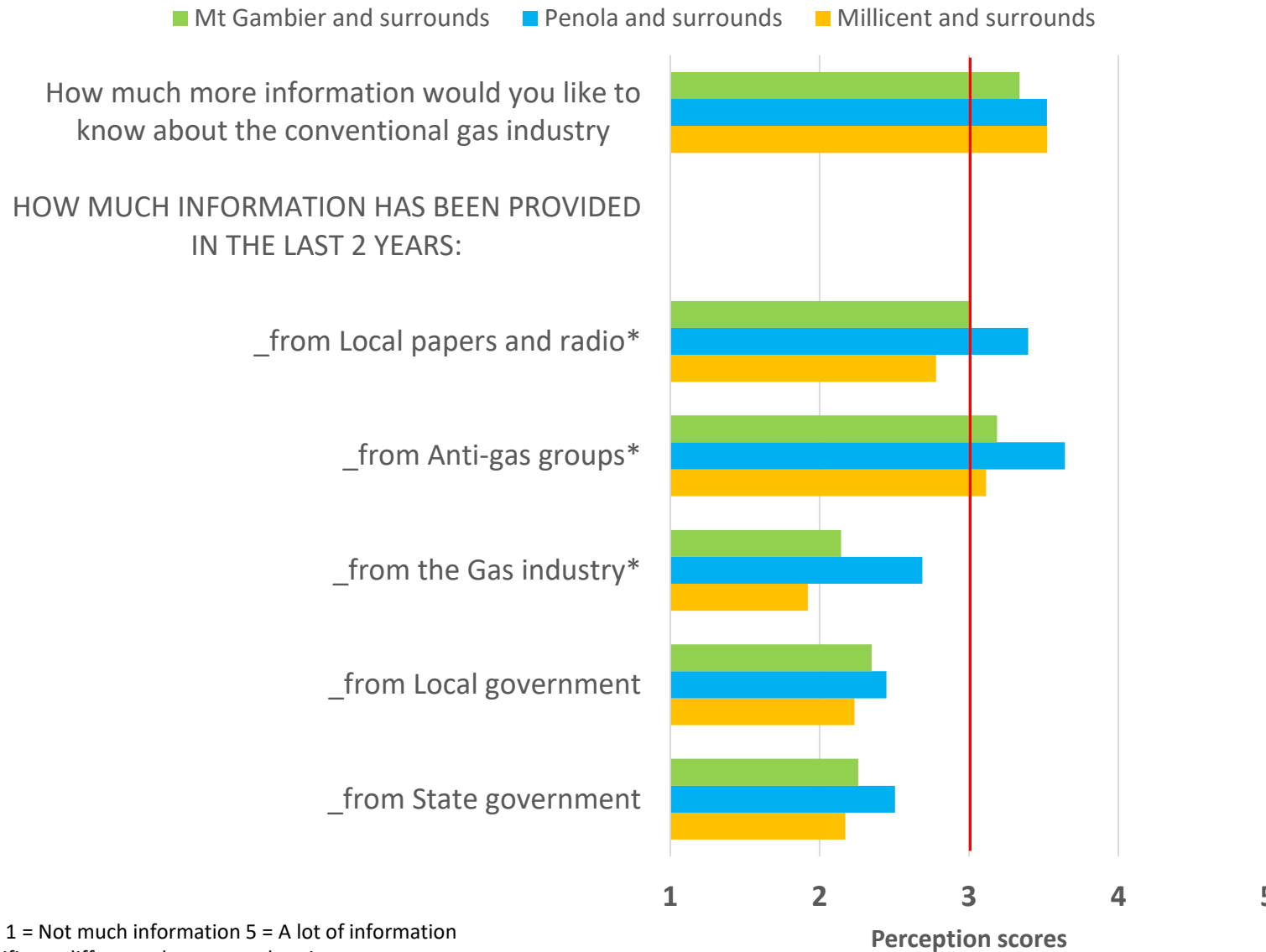
# Knowledge and understanding about conventional gas development limited outside Penola



# People are interested in more information

## What people want to know more about

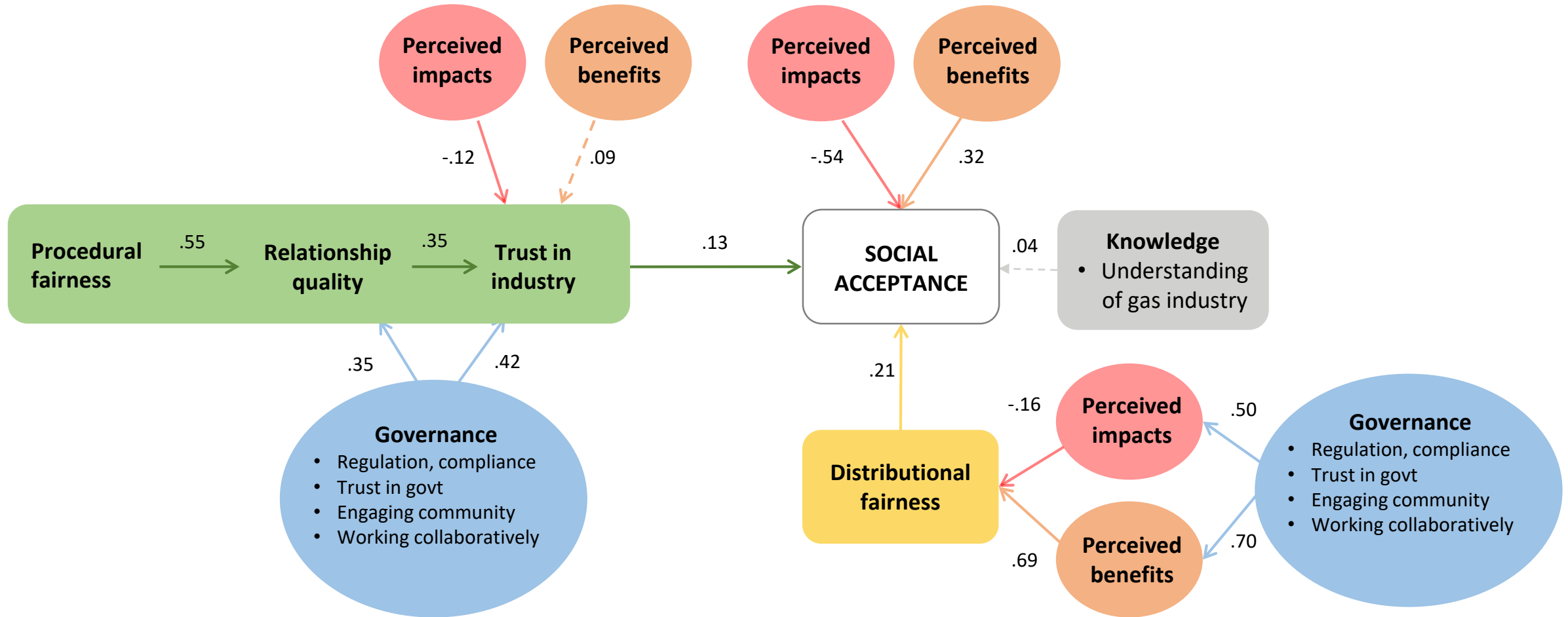
- Potential negative effects
- ‘What’s happening’
- Possible benefit effects
- Transparency



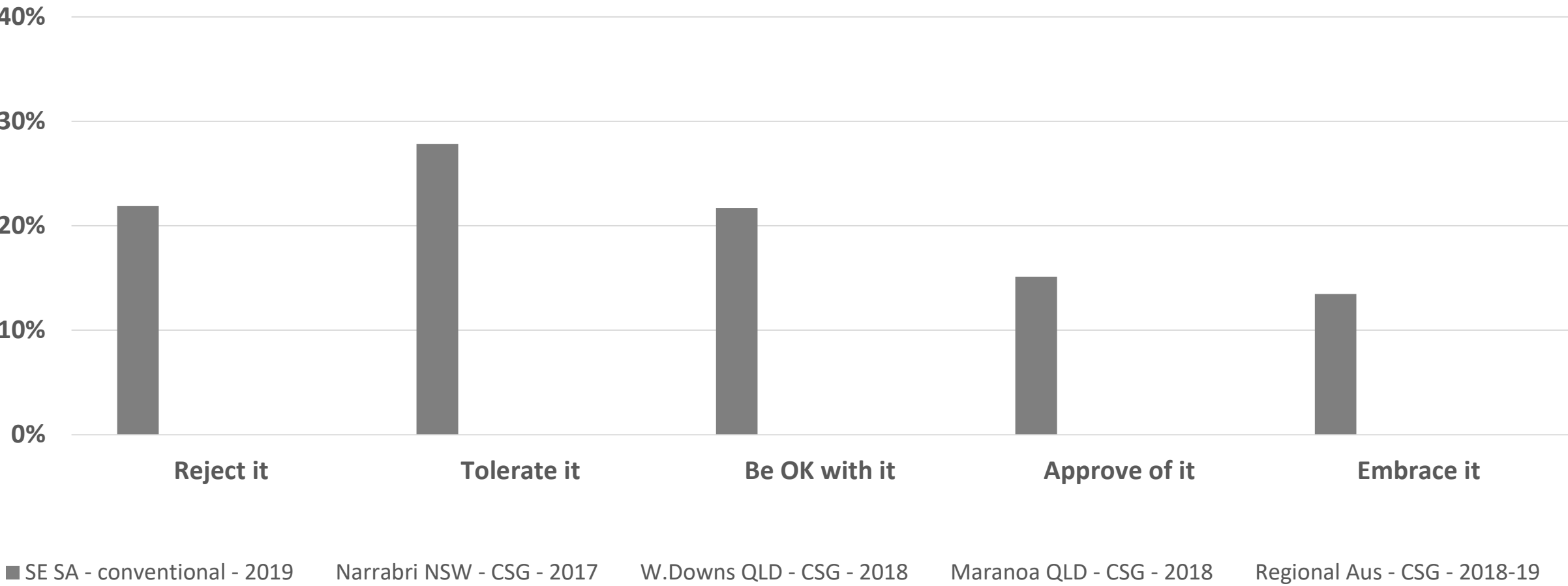
Note: 1 = Not much information 5 = A lot of information

\* significant difference between subregions

# Model of social acceptance: a framework for understanding community expectations

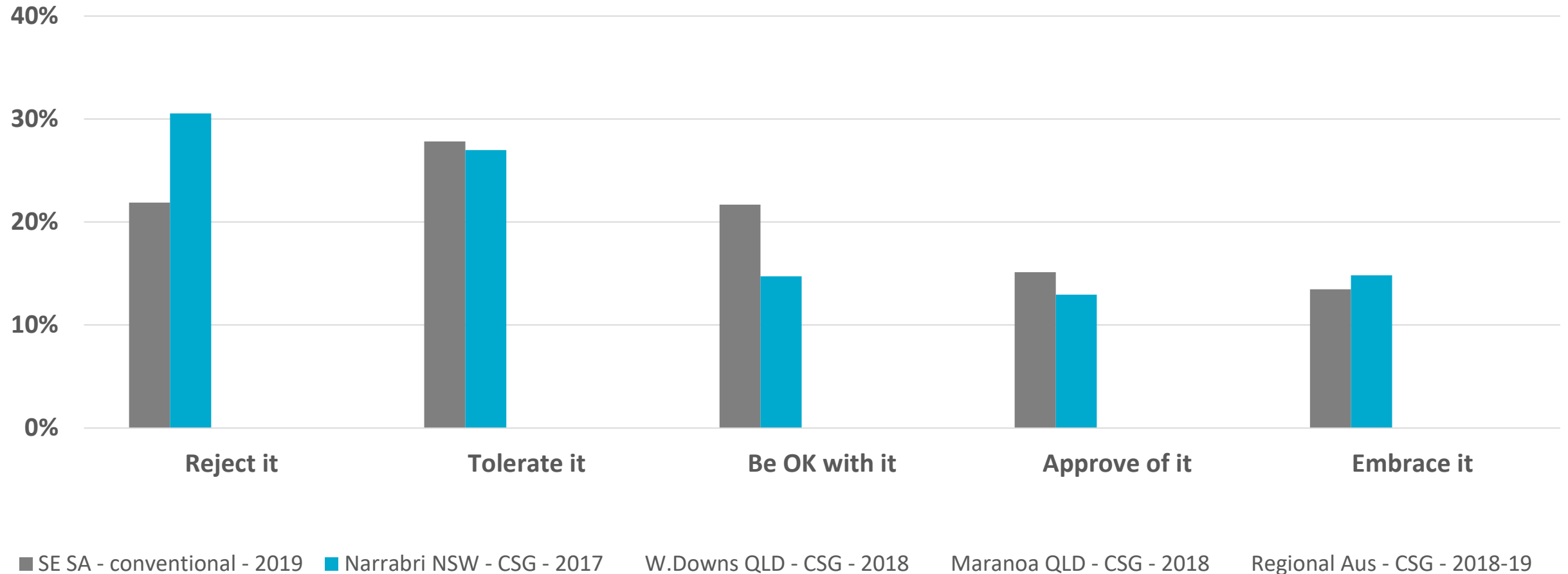


# Comparison with other states – overall attitude

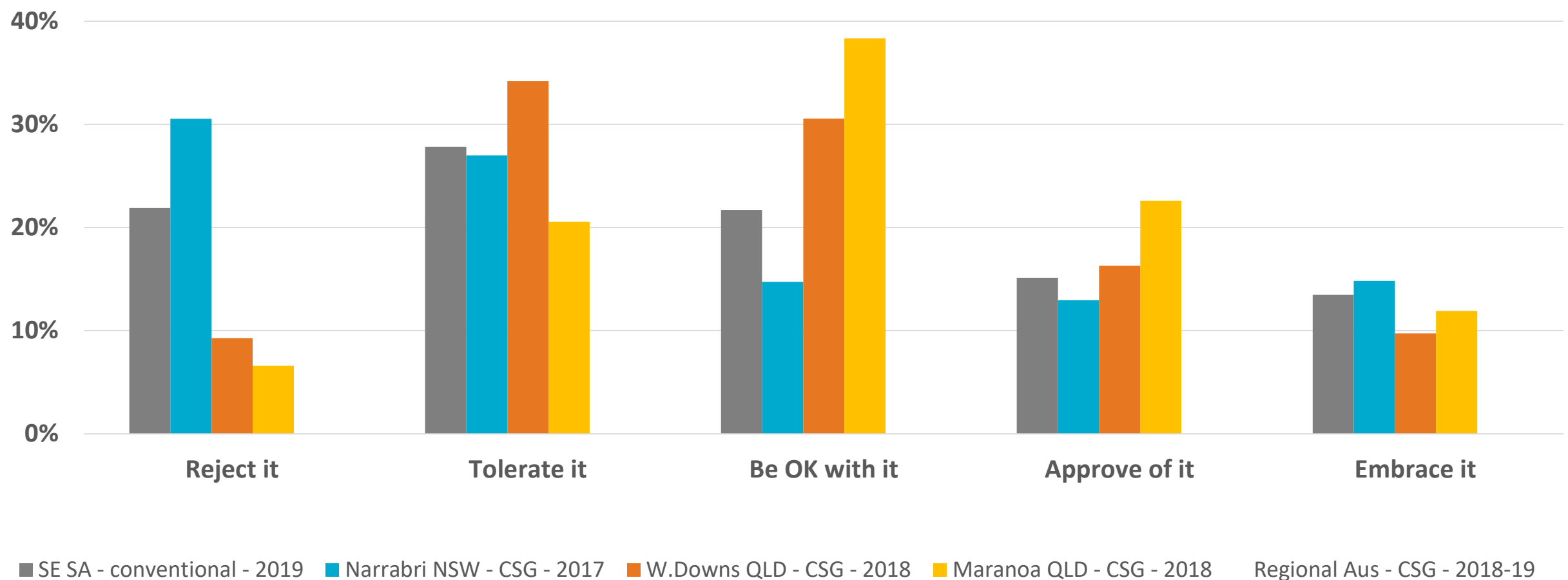




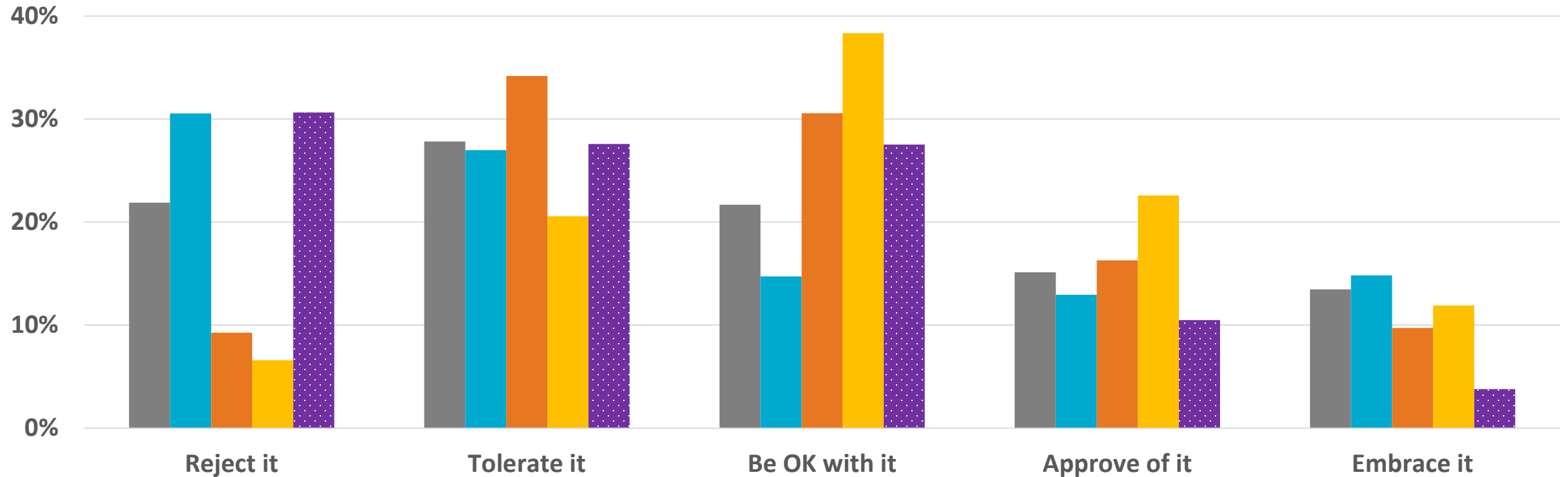
# Comparison with other states – overall attitude



# Comparison with other states – overall attitude



# Comparison with other states – overall attitude



■ SE SA - conventional - 2019 ■ Narrabri NSW - CSG - 2017 ■ W.Downs QLD - CSG - 2018 ■ Maranoa QLD - CSG - 2018 ■ Regional Aus - CSG - 2018-19

# Key messages: What were some for you?

## Community wellbeing

- Community wellbeing very high across the lower SE region, particularly in Penola and surrounds
- All subregions felt community wellbeing would continue to be high.
- The main drivers of community wellbeing across the region varied considerably among the subregions.

## Attitudes and perceptions of conventional gas development

- A range of views exist with most people tolerating or OK with it
- Gender and income to be factored into communication and engagement planning
- People more concerned about possible long-term future issues than more immediate impacts
  - particularly the possibility of unconventional gas in the future
- Benefits for the region not seen as high
- Good governance is key to shaping trust in the industry
- Information to address the key social licence variables –
  - what will the impacts be, what will the benefits be, how risks will be managed, how the industry is governed, what's happening, size and scope



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# Thank you

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