



# GILG Community Perception Survey

- GILG members are QAL, BSL, RTAY, Cement Australia and NRG
- Survey commissioned by GILG to ascertain the community's perception of the performance of these industries.
- Conducted in 2010 independently by CQUniversity's Centre for Environmental Management.
- Questions were asked across a range of corporate citizen and environment related areas.
- Results provided to GILG early 2011 and GILG board decided to release report to the community.



# Survey methods

- Primary data collected by National Field Services Australia (NFS) a market research and data collection agency using the resources division of Millward Brown Australia.
- 520 households randomly selected and surveyed by telephone, (267 male and 253 female) in 20 minute surveys
- Plus qualitative surveys with 12 in-depth face to face interviews.



# Survey demographics

- Majority were long-term Gladstone residents.
- Respondents were from **Gladstone** (62.3%), **Boyne Island/Tannum Sands (BITS)** (23.1%), former **Calliope Shire and Miriam Vale Shire** (14.6%).
- Three regions were further divided into 11 neighbourhoods: Boyne Valley, Toolooa-Glen Eden, Gladstone City, West Gladstone, Boyne Island- Tannum Sands, Calliope, Clinton, Kin Kora -Telina and Sun Valley, Gladstone South, New Auckland, and Yarwun-Targinnie for better understanding about views of Gladstone Industry performance at a neighbourhood level.
- Over half of the respondents either worked for a major industry in Gladstone or had a family member who did so.
- A quarter of the respondents were employed in either small or medium sized business and 14.8 percent of the respondents were Federal, State or Local government employees.
- The Gladstone population is generally younger (33 years) than the Queensland average of 36 years.



# Key findings

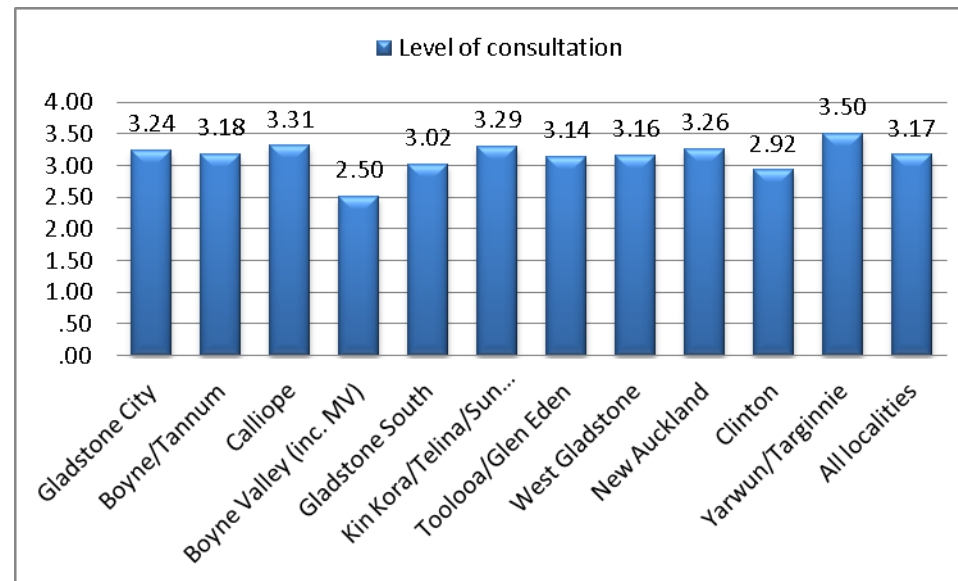
- Respondents rated GILG members' overall level of performance based on six key measures of good corporate citizenship. (scale 1-5, 5 being highest)

Good corporate citizenship indicators	NRG	CA	RTA-Y	BSL	QAL
Has a good reputation	3.63	<b>3.22</b>	<b>3.20</b>	3.21	3.21
Demonstrates care for the environment	3.23	2.82	3.10	3.02	2.90
Communicates clearly and openly with the community	3.23	2.77	3.15	3.04	3.20
Is trustworthy and believed	3.37	2.99	2.97	2.88	3.07
Is known as a good employer	<b>3.69</b>	3.17	3.17	<b>3.24</b>	<b>3.56</b>
Is concerned with and sensitive to the needs of the Indigenous community	2.31	2.14	2.80	2.47	2.42
<i>Average score</i>	<i>3.24</i>	<i>2.85</i>	<i>3.06</i>	<i>2.97</i>	<i>3.05</i>



## Community consultation

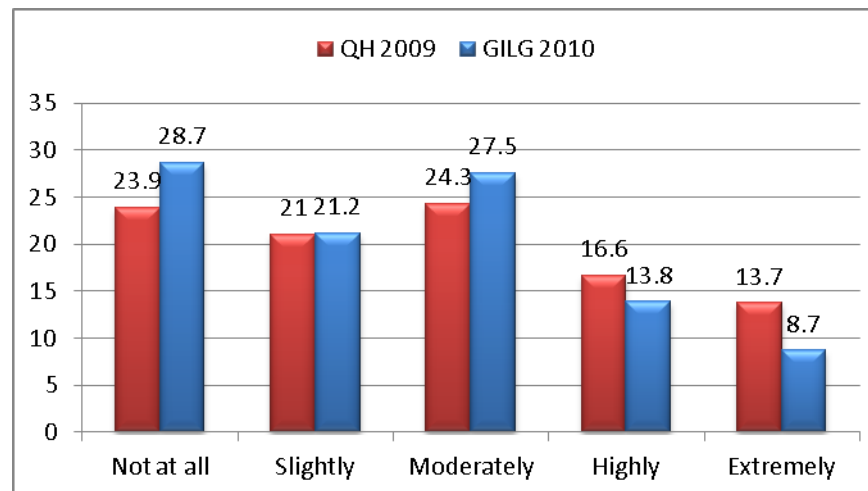
- The mean scores for the rating of level of consultation by industry in Gladstone are presented below.
- The results show a range across the locations from 2.4/5 in the Boyne Valley to 3.5/5 in the Yarwun Targinnie area.
- Results indicate QAL needs to conduct more consultation of its neighbours.





## Concern with industry impacts on personal health and the environment

- Graph shows the comparison of results between the 2009 Queensland Health survey and the 2010 (GILG) survey.
- Increase in those who are 'not at all' concerned as well as those who are 'moderately' concerned.
- Decrease in those who are highly or extremely concerned.



Concern that industry in Gladstone might affect your health, %

Safer. Cleaner. Better.



## Industry emissions concern

- Selected industry emissions are shown ranked by the highest mean score, whereby a higher score indicates greater concern.
- The highest level of concern by Gladstone residents was dust followed by air quality.

Industry emissions	Mean
Dust	3.62
Air quality	3.61
Chemicals	3.50
Water pollution	3.40
Fumes	3.28
Land pollution	3.24
Odour	3.04
Noise	2.65
Radiation	2.57
Lighting	2.36



## Other industry emissions

- The majority of responses indicating other industry emissions of concern were seen to be associated with QAL (odour, caustic vapour) and the prevalence of coal dust from the rail and port facilities within close proximity to the Gladstone CBD area.

Industry emission	No. of responses
Alumina refining (odour, caustic vapour)	17
Coal dust	12
Nitrous oxide, carbon and sulphur dioxide	6
General emissions/concerns	6
Concern for nature (land clearing & water pollution)	5
Fluoride	3
Traffic emissions	3
Carcinogens, heavy metals	3
Visual pollution	3
Shale	2
Red mud dam	2



## Emissions attributed to industries

- The respondents were asked to identify industry emissions they were concerned about and if possible identify the industry that they associated with the emission.
- A total of 537 responses were coded from the data into the categories shown below. A significant number of emissions were not able to be categorised (208/537).

Company	Not defined	Odour/fumes	Dust	Caustic emissions	Air quality	Other chemicals <sup>1</sup>	Noise	Company total
QAL	72	69	26	41	28	5	3	244
BSL	31	5	4	0	6	9	0	55
GPC	14	0	15	0	1	0	1	31
RTA	10	5	1	2	2	1	0	21
NRG	21	4	1	5	12	8	0	51
CA	4	0	1	0	0	0	0	5
Orica	3	1	1	1	2	4	0	12
Coal (industry)	13	0	39	0	0	0	1	53
LNG - new industry	4	0	0	0	0	0	0	4
Industry not identified	36	3	3	1	9	8	1	61
<b>Total</b>	<b>208</b>	<b>87</b>	<b>91</b>	<b>50</b>	<b>60</b>	<b>35</b>	<b>6</b>	<b>537</b>



QUEENSLAND ALUMINA LIMITED



# Study summary

- *The combination of the performance of Gladstone industry and the level of acceptance within the local community indicates that Gladstone industry is performing satisfactorily in the task of maintaining a 'social licence to operate' in the region. The challenge is for industry to not only maintain its satisfactory performance but to maximise its efforts through positive action to increase support throughout the community.*

Safer. Cleaner. Better.



## Where to from here?

- Study will replace QAL's biennial Community and Corporate Issues Survey
- Some other GILG members also had their own community surveys so the combined study will no longer over-consult the community.
- GILG hopes to continue this study on an annual or biennial basis and will be able to monitor changes in the community's satisfaction of industry performance and address issues where possible.
- QAL will continue environmental improvement projects and address changing concerns where possible.