

Australia Pacific LNG Project

Volume 5: Attachments

Attachment 43: Bergent Community Values Research – Gas Fields

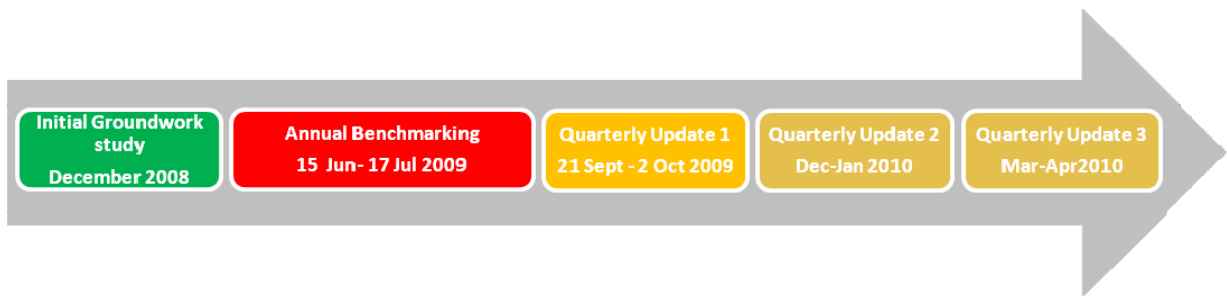
Contents

1.	Summary of Bergent research Stakeholder interview Results	1
1.1	Profile of respondents	1
1.1.1	Survey group profile	1
1.2	Detailed Research Methodology	3
1.2.1	Approach	3
1.2.2	Session flow	3
1.2.3	Research tools - Qualitative probes	3
1.3	Key findings	3
1.3.1	Awareness of project.....	3
1.3.2	Research findings overview.....	4
1.3.3	Detailed analysis – Community Issues.....	4
2.	SURVEY 2: Annual Benchmarking Study and subsequent RESEARCH	
Waves	7
2.1	Profile of respondents	7
2.1.1	Survey group profile	7
2.2	Detailed Research Methodology	8
2.2.1	Approach	8
2.2.2	Session flow	9
2.2.3	Research tools - Questionnaire	9
2.2.4	Research tools - Qualitative Probes	10
2.2.5	Critical Community Issues Analysis.....	10
2.3	Key findings	10
2.3.1	Research findings overview.....	10
2.3.2	Awareness of project.....	11
2.3.3	Detailed analysis - Top 10 critical community issues as perceived by stakeholders	11
2.4	Social Values by Town.....	14

1. Summary of Bergent research Stakeholder interview Results

This appendix provides a summary of stakeholder attitudes in the South-West Queensland gas fields undertaken by Bergent Research Pty Ltd in 2008 and 2009. In December 2008, an initial qualitative groundwork study was conducted. Following this, Bergent conducted the first in what is to become an annual benchmark in June-July 2009, and are currently in the process of conducting subsequent waves of research utilising both qualitative and quantitative research methodology. The first quarterly update took place in September-October 2009 and two further quarterly updates are scheduled for December-January 2010 and March-April 2010.

Figure 1 2008-2010 Origin Research Schedule



Survey 1: Initial Groundwork Study

Bergent conducted an initial groundwork study to identify the key community concerns regarding coal seam gas (CSG) operations in the towns of Roma, Chinchilla and Miles in

South-West Queensland. Qualitative techniques were employed to ensure a preliminary but thorough understanding of the issues to help guide subsequent research.

1.1 Profile of respondents

1.1.1 Survey group profile

Respondent selection

Bergent randomly selected respondents (stakeholders) using telephone recruitment. Using telephone recruitment eliminated the risk of excluding stakeholders from the research who

- do not have internet access
- are online infrequently
- are generally illiterate
- are computer illiterate

In addition, some respondents were recruited face-to-face at the Roma Show.

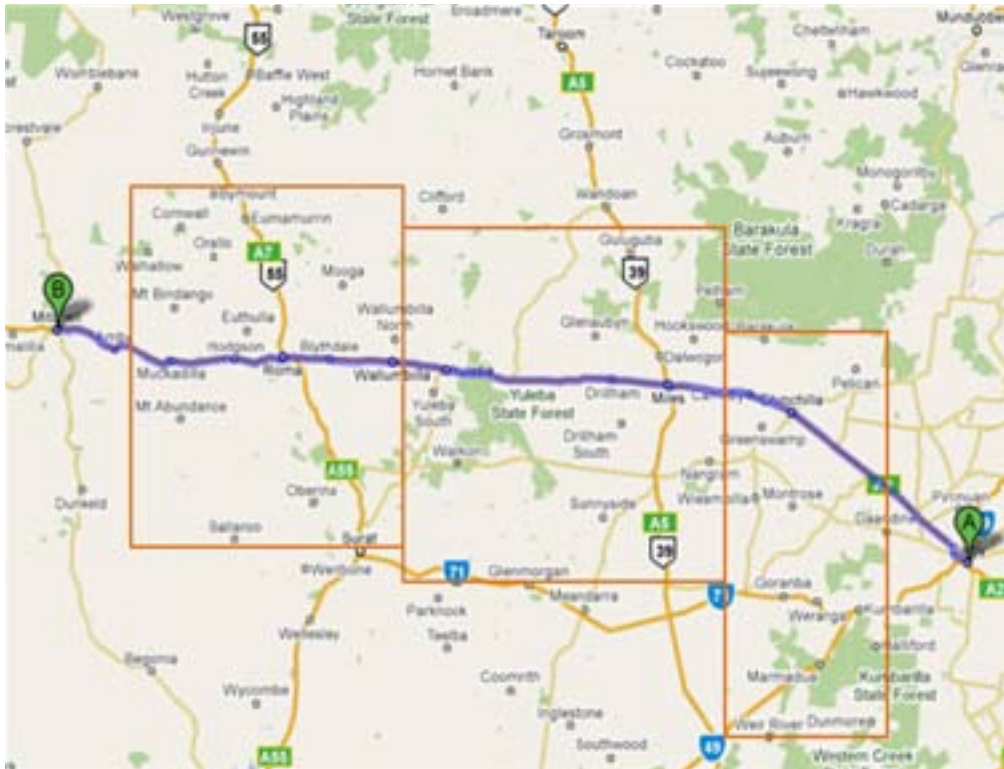
Respondent definition

- Origin landowners – landowners who have been in contact with Origin Landowner Liaison officers
- Non-Origin landowners – landowners who have not been in contact with Origin Landowner Liaison officers
- Bureaucrats residing in Chinchilla, Roma and Miles
- Community stakeholders – people who live in the towns of Chinchilla, Roma and Miles

Geographic zone definition

Research encompassed the Origin defined zones of Chinchilla, Miles and Roma.

Figure 2 2009 Geographic zones for research



Map source: Google Maps

Zones: Defined by Origin

1.2 Detailed Research Methodology

1.2.1 Approach

The research methodology employed a qualitative approach conducting eighteen depth interviews and two focus groups (in Roma and Chinchilla). This enabled Bergent to gain an initial understanding of attitudes, beliefs and behaviours that were prevalent in the broader community. Once general attitudes and perceptions were identified, Bergent used them to develop ideas and generate hypotheses to direct subsequent research in the area.

All research undertaken as a part of this initial study was conducted face-to-face with respondents. While telephone was sufficient for recruitment, face-to-face was deemed the most appropriate approach for interviews. Other benefits of face-to-face include:

- reduced misinterpretation of stakeholder responses via observation of verbal and non-verbal cues
- increased respondent participation and ease

1.2.2 Session flow

During each depth interview and focus group, Bergent briefed stakeholders on the research purpose and then conducted semi-structured group or one-on-one discussions exploring attitudes and perceptions of a range of topics.

1.2.3 Research tools - Qualitative probes

Running sheets (written guides designed to direct discussion during focus groups and depth interviews) were semi-structured. This allowed Bergent to probe stakeholders' thoughts on specific issues and gave stakeholders an opportunity to raise new or unaddressed topics.

Bergent used psychological techniques such as laddering and projection to assist stakeholders to express their underlying thoughts and feelings.

1.3 Key findings

1.3.1 Awareness of project

Awareness of CSG

Qualitatively, most stakeholders had heard of CSG but the level of understanding and their responses varied. All landowners were aware of potential negative influences CSG could have on their land. Many community stakeholders, however, could not differentiate between coal, gas or construction companies.

Awareness of Origin

Amongst all stakeholders, there was high awareness of the Origin brand and it was seen as being one of the best operators in the area.

Awareness of Conoco Phillips

Some stakeholders had heard of an Origin deal with the US, but they did not seem to know any details.

1.3.2 Research findings overview

Qualitatively, the six community issues uncovered by the first round of research were:

- a) Economy
- b) Water
- c) Environment
- d) Money
- e) Roads and Infrastructure
- f) Transient workers

The research found there were two distinct groups of landowners were identified during the study – ‘passive’ and ‘active’, which generally correlated with the level of knowledge and engagement with CSG activity.

1.3.3 Detailed analysis – Community Issues

Economy

Stakeholders, in particular bureaucrats, believe that gas brings a promise of long-term economic viability, especially in times of drought. Businesses serving the gas industry generally felt that they were benefiting from the presence of the CSG business in town.

However, small businesses seemed to find it hard to retain employees, due to the higher wages offered by the gas companies. Stakeholders voiced that this imbalance was creating tension between local business and gas companies. Stakeholders reported having difficulty and having to wait a long time to get access to tradesmen and other services.

Water

Stakeholders stated that water supply and quality is of the utmost importance to the local people of Roma, Chinchilla and Miles. Most community stakeholders had vague concerns about the impact of CSG on water supplies.

A few community stakeholders were aware of Origin's reverse osmosis plant at Spring Gully, and they commended Origin for this work. Those who were aware of the water operations at Spring Gully believed that the treated water would go back to the town for water supply or irrigation. However, many appeared to be frustrated, stating there had been no progress on this.

Bureaucrats were optimistic that the CSG water would make the town water supply sustainable. They believed that the problem with the salt would diminish due to water treatment and other environmental controls being put into place. They also hoped that a market would be found for the excess salt produced during the CSG extraction process.

Environment

Active landowners expressed concern about the effect of the CSG exploration on the landscape, and in particular about what the land would look like in years to come. Passive landowners hoped that governments and companies would take responsibility and 'do the right thing'.

Some Origin landowners said that they have had issues with work undertaken on their property, such as holes not being filled in after exploration. However, most felt that Origin had addressed these problems efficiently and fairly. Most who had experienced exploratory drilling on their property believed it only had a limited impact.

Some stakeholders also had concerns about the impact of land clearing, drilling and road and fence building on the environment.

Money

At the time of the research, stakeholders said that the cost of real estate and rent had increased significantly in a relatively short period; which was a cause for concern for many of the people interviewed.

Community stakeholders expressed concern for local pensioners and disadvantaged members of the community, who they said were experiencing housing affordability issues. Small businesses also felt affected, in that they could only afford to hire staff who did not need to earn the money to pay rent.

Roads and infrastructure

All stakeholders were concerned by a reduction in road safety in the local area, which they attributed to the increase in volume and speed of road trains and other construction vehicles. Most stakeholders held the council responsible for improving their major roads, while others believed that the gas companies should fund road repairs, as they perceived the damage as being a result of the gas exploration.

Stakeholders expressed that the increase in population and local activity was not being accompanied by a relative increase in local government services.

Transient Workers

Socially, stakeholders felt that the town was changing, with transient workers moving in their own groups. The sheer volume of new people utilising their pubs and other social venues had led to a perceived segregation. Some stakeholders also felt that their country way of life was under threat.

2. SURVEY 2: Annual Benchmarking Study and subsequent RESEARCH Waves

Following the initial groundwork study, Bergent has been conducting quarterly waves of research on behalf of Origin to track any changes in community sentiment and values. To date, this has consisted of one substantial annual benchmark study to gain a thorough understanding of topics with a robust sample of stakeholders. Building on the statistical confidence of the annual benchmark study, there has been one quarterly wave of research in September-October 2009 with two more to follow in December-January 2010 and March-April 2010. The results of these updates will assist Origin to ensure it is aware of changes in stakeholder perceptions across key topics regularly.

2.1 Profile of respondents

2.1.1 Survey group profile

Respondent selection

Bergent randomly selects respondents (stakeholders) using telephone recruitment. Prior research revealed stakeholders prefer verbal communication to mail and online. Using telephone recruitment also eliminates the risk of excluding stakeholders from the research who

- do not have internet access
- are online infrequently
- are generally illiterate
- are computer illiterate

The research approach gives stakeholders the opportunity to provide feedback throughout the project and prevents sample exhaustion.

Respondent definition

- Origin landowners – landowners who have been in contact with Origin Landowner Liaison officers
- Non-Origin landowners – landowners who have not been in contact with Origin Landowner Liaison officers
- State politicians
- Local politicians
- Media
- Community members

Geographic zone definition

This study encompasses the Origin defined zones of Toowoomba, Dalby, Chinchilla, Miles and Roma plus the greater Brisbane area.

Figure 2 2009 Geographic zones for research



Map source: Google Maps

Zones: Defined by Origin

2.2 Detailed Research Methodology

2.2.1 Approach

The research methodology incorporates both quantitative and qualitative approaches using surveys, depth interviews and focus groups. The selected methodology is applied according to the stakeholder group and the level of detail required by the survey. This enables Bergent to quantify key metrics in each quarter and then to probe attitudes further using psychological techniques for deeper understanding of stakeholder perceptions.

This is an important step for identifying stakeholder interpretation of key issues. Bergent present a range of topics to stakeholders (see research tools – questionnaire) and then qualitatively probe their interpretation using psychological techniques (see research tools – qualitative probes).

During the benchmark wave, Bergent conducted research face-to-face where appropriate. Earlier waves of research revealed target stakeholders prefer verbal communication. While telephone surveys were sufficient for recruitment of interviewees, face-to-face is the ideal approach for interviewing.

Prior research revealed that some stakeholders have difficulty with online or mail surveys due to relatively low levels of general and computer literacy. This includes those that were not working in an office job, senior citizens, and those living outside of metropolitan areas. Some older stakeholders require assistance due to age related issues such as hearing and vision impairment. For these stakeholders, face-to-face surveying is important.

For the quarterly waves of research, Bergent continue with this approach for community and landowners while employing telephone interviewing for all media, bureaucrats, local and state politicians for respondent convenience.

2.2.2 Session flow

During each session, Bergent briefs stakeholders on the research purpose and process and then asks them to complete a 15-30 minute questionnaire. This approach ensures Bergent can collect data that is not polluted or influenced by other stakeholders and allows for quantification of key metrics.

For face-to-face methods, those that are unable to complete a computer questionnaire, complete a paper copy questionnaire. In instances where stakeholders are unable to complete a questionnaire successfully by themselves, Bergent reads questions aloud and transcribes the responses. This overcomes literacy, writing skill, hearing and visual impairment issues while ensuring the views of these stakeholders are captured.

Once the questionnaire is complete, stakeholders take part in a 30-minute semi-structured discussion exploring attitudes and perceptions of a range of topics. This adds context to the quantitative data and reveals the 'why' behind the hard metric results.

2.2.3 Research tools - Questionnaire

Bergent generates questions based on hypotheses developed from the initial ground work study, prior professional experience as well as academic theories including Servqual developed by Zeithaml, Parasuraman & Berry (1988) and Maslow's Hierarchy of Needs. Determined by the results of the initial groundwork study, prior experience and the aforementioned theories, the questionnaire measures and tracks changes in stakeholder perceptions of a number of key topics.

To ensure questions are simple and easily understood by stakeholders, the questionnaire

- does not include double-barrelled questions
- draws only from the top 1,000 most frequently used words in English

2.2.4 Research tools - Qualitative Probes

Written guides designed to direct discussion during focus groups and depth interviews, or running sheets, are used to ensure each interview is semi-structured. This allows Bergent to probe stakeholders' thoughts on specific issues and gives stakeholders an opportunity to raise new or previously unaddressed topics.

Bergent use psychological techniques such as laddering and projection, to assist stakeholders to express their underlying thoughts and feelings.

2.2.5 Critical Community Issues Analysis

Stakeholders' perceptions on a range of issues are analysed using a statistically derived algorithm where stakeholders are asked to rate a list of issues in terms of importance of the issue, frequency of thought and ease of solving the issue. These ratings are then weighted and used to form a list of top 10 critical community issues, where each issue is given a score that reflects its strength in the minds of stakeholders.

2.3 Key findings

2.3.1 Research findings overview

Most stakeholders felt that their quality of life is either improving (44% benchmark, 45% first quarterly update) or staying the same (45% benchmark, 38% first quarterly update).

The top 10 critical community issues, with their respective scores as perceived by stakeholders, identified in the Jun-Jul benchmark wave were:

- a) Economy (Score: 32.0)
- b) Water (Score: 30.1)
- c) Environment (Score: 29.2)
- d) Family (Score: 28.2)
- e) Relationships (Score: 26.1)
- f) Money (Score: 25.4)
- g) Kids (Score: 24.7)
- h) Health (physical) (Score: 24.4)
- i) Work (Score: 24.3)
- j) Safety (Score: 24.0)

The first quarterly update conducted in September-October indicated the economy, water and environment have become issues that are even more critical in the minds of stakeholders.

It is important to note that most stakeholders perceive the issues under investigation in the context of their own local area, community or personal life, as opposed to a broader context.

2.3.2 Awareness of project

Awareness of CSG

Qualitatively, most stakeholders have heard of CSG but the level of understanding of CSG varies. Some have a full understanding of CSG but others are not as aware, typically confusing CSG with open cut mining. Furthermore, mergers and strategic alliances are adding to confusion among community members.

Awareness of Origin

There is high awareness of Origin amongst stakeholders; with 73% of respondents in the benchmark and 78% in the first quarterly update able to recall the brand without prompting. When aided by a logo, awareness of Origin increased to 98% in the benchmark and 94% in the first quarterly update.

Awareness of ConocoPhillips

No stakeholders recalled the ConocoPhillips brand without prompting in either of the waves. This was to be expected as ConocoPhillips is not active in the gas fields area. However, once prompted, awareness reached 40% in the benchmark and 26% in the first quarterly update.

2.3.3 Detailed analysis - Top 10 critical community issues as perceived by stakeholders

Economy (Score: 32.0)

Qualitatively, most stakeholders say the local economy is improving with the mining sector bringing more jobs and opportunities into towns. As the mining industry continues to grow, its increasing contribution to the local economy remains a key area of focus for stakeholders. In contrast, stakeholders see agriculture and its contribution to the economy as under threat, due to low rainfall.

Due to the local economy becoming increasingly reliant on mining, stakeholders say that there needs to be a long term, post-mining economic support plan.

Stakeholders say that they prefer companies to 'buy local' from businesses in the area instead of bringing in their own supplies and suppliers. This also applies to the hiring of staff from the local area, instead of flying in workers. Where companies fly in workers, stakeholders prefer that workers from outside the area integrate and settle into the local community. Lack of integration concerns stakeholders due to the transient effect it has on their community.

Water (Score: 30.1)

Many stakeholders say that surface water is scarce in their local area and that this drought is particularly severe. Concern regarding rainfall was much stronger during the first quarterly update; stakeholders believed they had not had substantial rain during this period, which threatened crops and livestock.

Stakeholders say that they are becoming more reliant on ground water due to the lack of rainfall. Some say that they have to drill further to access bore water, which they believe indicates that water levels are reducing underground. In addition to this, there is some fear among stakeholders that mining in the area poses a threat to aquifer and great artesian basin water quality due to perceived contamination caused by the drilling.

Environment (Score: 29.2)

The local environment encompasses many facets. Key topics include water (as discussed previously), weed and weed seed transfer and salination.

Stakeholders say weed seed transfer in the local areas has been a problem historically and continues to be a problem now. Controlling weed seed spread between properties is of great concern as this threatens local flora and fauna, as well as the productivity of farming land.

Specifically in relation to mining, stakeholders are concerned about the long-term impact of salination of soil due to the use of evaporation ponds, as well as potential leakage and overspray during the mining process. The first quarterly update found that some stakeholders in Dalby and Chinchilla were aware of new legislation banning evaporative ponds. Stakeholders perceived this as a positive step in preventing salination but are now seeking information about how water treatment will be handled, focusing on long-term soil protection.

Family (Score: 28.2)

Many stakeholders say that they choose to live in the country because of their families as the strong values and heritage of rural areas allows them to develop better familial relationships. Stakeholders say that family is a private matter and that they themselves are primarily responsible for this critical issue. Stakeholder focus is on how they can continue to “enjoy the good life together”. Therefore, they are most concerned with the preservation of the status quo.

Relationships (Score: 26.1)

Stakeholders interpret the term ‘relationships’ as being about relationships between partners. Stakeholder focus is on maintaining relationships and staying together. This is considered a private matter between the two individuals involved.

Most stakeholders do not make a direct link between this issue and the mining industry, but do sometimes voice that there are initiatives that mining companies

could undertake in order to ease relationship issues, such as more flexible working hours for employees in the industry.

For some younger men, forming relationships is a concern as there are fewer young women in town, and competition from more affluent and potentially better-educated outsiders is increasing.

Money (Score: 25.4)

Stakeholders perceive that income levels are changing in the community because of CSG growth and the money that it generates. Some stakeholders are concerned that people living in towns now sometimes earn more than farmers do and that landowners with CSG wells earn more than those without CSG wells on their properties. Thus, stakeholders feel that the balance of power is shifting away from traditional holders of power to other groups within the community.

There is also some concern amongst stakeholders that pensioners, teens, Indigenous Australians and those on fixed incomes may become disadvantaged due to lack of access to opportunities associated with regional growth, with some stakeholders worrying that this could create a two-tiered community.

Kids (Score: 24.7)

All stakeholders feel kids are an important part of the community and its future. While they recognise that mining opens up new jobs outside of life on the land, stakeholders are concerned that some kids are leaving school early to work in the mining industry. This raises concerns about the kids' long-term career prospects - especially if training and further opportunities within the industry are not provided.

Some stakeholders are also concerned about the lack of stability transient workers' kids receive. These stakeholders feel that this lifestyle is not appropriate for kids as they are more susceptible to a broken education and reside for extended periods in inappropriate accommodation, such as motels. There are also concerns about these kids having different values and the perceived likelihood of them bringing 'city problems' to rural areas.

Health (Physical) (Score: 24.4)

Stakeholders say that they have access to physical health facilities but are lacking access to an adequate number of medical professionals. Stakeholders living in Miles and Chinchilla are particularly concerned about the maternity capabilities of Chinchilla hospital. Stakeholders say that the hospital turns away women in labour, forcing them to endure painful and risky journeys to Dalby hospital. Stakeholders feel that governments should be doing more to plan for the current and future health needs of South West Queensland.

Work (Score: 24.3)

Stakeholders believe that work is a significant part of their lives. Mining has brought with it different work opportunities.

Landowners working on their properties with mining express that there have been some compatibility challenges and identify better training as a worthwhile method for improving these challenges. Landowners feel that mining employees would benefit from undertaking basic farm safety training, and that they, as landowners, need basic mining protocols and safety training in return.

Landowners say that during the compensation negotiation process, different groups get different deals and that there is a lack of transparency. There is some concern that older, poorer or less sophisticated landowners are at risk of exploitation during this process due to their lower bargaining power when compared to richer, more sophisticated landowners. This raises concerns about equity in the community. Some landowners also say that mining companies make certain commitments during these negotiations but do not always deliver on these during implementation.

Safety (Score: 24.0)

All stakeholders feel individuals should be responsible for their own safety. Some stakeholders say that their communities are becoming less safe especially in relation to theft and public safety.

As discussed in work (section d. ix), landowners say they need training to safely work with mining, and vice versa.

2.4 Social Values by Town

Bergent's research found that while common community issues existed throughout the affected area, each town had a unique community issues profile. This section outlines these profiles, as found during the Benchmark study.

Social Values Overview: Brisbane

What liked about town	Stakeholders see Brisbane as a safe place with all the conveniences of a bigger city.
What disliked about town	Transport infrastructure is currently being upgraded, causing frustration and delays. Stakeholders are feeling a sense of 'invasion' by those from the Southern states.
How changes are perceived	Stakeholders say Brisbane is getting bigger and busier – even in the 'quiet' suburbs.
Perceived impact of mining, CSG, Origin and competitors	Brisbane stakeholders are focused on retail issues such as electricity price increases. There was no awareness of CSG.

Social Values Overview: Toowoomba

What liked about town	<p>Stakeholders see Toowoomba as having a great sense of ‘community spirit’.</p> <p>Farming land in the region is seen as being very fertile.</p> <p>Stakeholders are proud of the fact that they are Queensland’s biggest inland town, while maintaining a country feel.</p> <p>Stakeholders say that unemployment is low, with plenty of industry to support the local economy.</p>
What disliked about town	<p>Toowoomba is seen as being a ‘gateway’ for the region, with stakeholders saying traffic has significantly increased.</p> <p>Some say that the investment is passing through, and not going into the town.</p>
How changes are perceived	<p>Stakeholders say that the socio-economic spread in town is rising, with less affluent people moving from South Western towns.</p>
Perceived impact of mining, CSG, Origin and competitors	<p>Very little understanding of the difference between CSG and coal, and as a result, some worry that Toowoomba will experience a similar fate as Acland. This is especially true for those that live near Felton.</p> <p>Landowners feel concerned about mining operations on black soil.</p> <p>Many stakeholders are retail-focused; and know of Origin because of its retail operations.</p>

Social Values Overview: Dalby

What liked about town	<p>Stakeholders see Dalby as a modern country town that retains a small town feel.</p> <p>Stakeholders are proud of their crop-growing capabilities, stating that the black soil in the region is among the best in Australia. Due to this, Dalby stakeholders feel that their town enjoys a sense of exclusivity compared to other towns in the region.</p>
What disliked about town	<p>Stakeholders feel that infrastructure is deteriorating – they state that roads are in disrepair and medical services are difficult to access.</p>
How changes are perceived	<p>Stakeholders say that the town is moving from a farming town to an ‘energy town’. Most are welcoming of this, but</p>

Perceived impact of mining, CSG, Origin and competitors

some miss the past.

Stakeholders welcome the fact that new trades are coming into town and some say that they like seeing new faces around the community.

Dalby stakeholders are very focussed on crop growing, and therefore worry about CSG’s impact on black soil.

Many view CSG as an ‘experimental’ process.

Stakeholders state that crop-growing land is more valuable than grazing land further West, and that compensation needs to reflect this.

Origin is seen as being more consultative than other companies, but stakeholders would like to find out more about Origin’s plans.

Social Values Overview: Chinchilla

What liked about town

Stakeholders say that Chinchilla is very family focussed, with a small-town feel.

What disliked about town

Stakeholders say that the cost of living has increased – especially housing.

Many feel that the Warrego Highway is ‘falling apart’.

How changes are perceived

Stakeholders say that the town is becoming more sustainable, with more amenities and services.

Some say that they feel invaded by all the new people in the area.

Stakeholders are deeply concerned about the issue of water.

Perceived impact of mining, CSG, Origin and competitors

Many stakeholders do not understand the difference between CSG and coal mining. Stakeholders are seeking answers, but are unsure where they can get them.

The community is familiar with the coal industry due to close proximity to Kogan Creek.

Like Dalby, stakeholders are concerned about the impact the energy industry will have on black soil.

Chinchilla residents are concerned about what will happen after CSG.

Social Values Overview: Miles

What liked about town	Stakeholders say that Miles offers a relaxed country lifestyle, and that it is an ideal place to raise a family.
What disliked about town	Stakeholders feel that the future is uncertain. Many are concerned that the new hospital has too few staff.
How changes are perceived	Stakeholders feel that they have been sheltered from big city influence until recently. Many say that property prices have risen rapidly in the last few years.
Perceived impact of mining, CSG, Origin and competitors	Stakeholders look to Chinchilla for an indication of what the future may hold. Some expect the town to be bought out like Wandoan. Many do not understand the difference between CSG and coal. Stakeholders feel that new arrivals to town should integrate more with the community. Many are frustrated because they feel that the energy industry is not adequately utilising local services and employees.

Social Values Overview: Roma

What liked about town	Roma stakeholders seem themselves as pioneers of the mining industry. Most feel that the lifestyle is attractive but tough.
What disliked about town	Stakeholders feel that young people choose to work in the gas fields rather than in town, and due to this, they say that local businesses are finding it difficult to source local apprentices and staff. Many wonder about what will happen when the migrant visas 'dry up'.
How changes are perceived	Stakeholders say that everyone seems to be working harder and longer.

Perceived impact of mining, CSG, Origin and competitors

Roma stakeholders appear to be friendlier towards the CSG industry due to prior experience and heritage.

Many stakeholders say that mining will sustain the town through the drought, especially as the land is not very productive.

Some fear that the industry will leave, and this creates concern.