

# Queensland Resources Sector Reputation Deep Dive

## Queensland Resources Council

Full Report, December 2018

This project was carried out in compliance with ISO 20252:2012.



01

# Background and Research Approach





# Background & Research

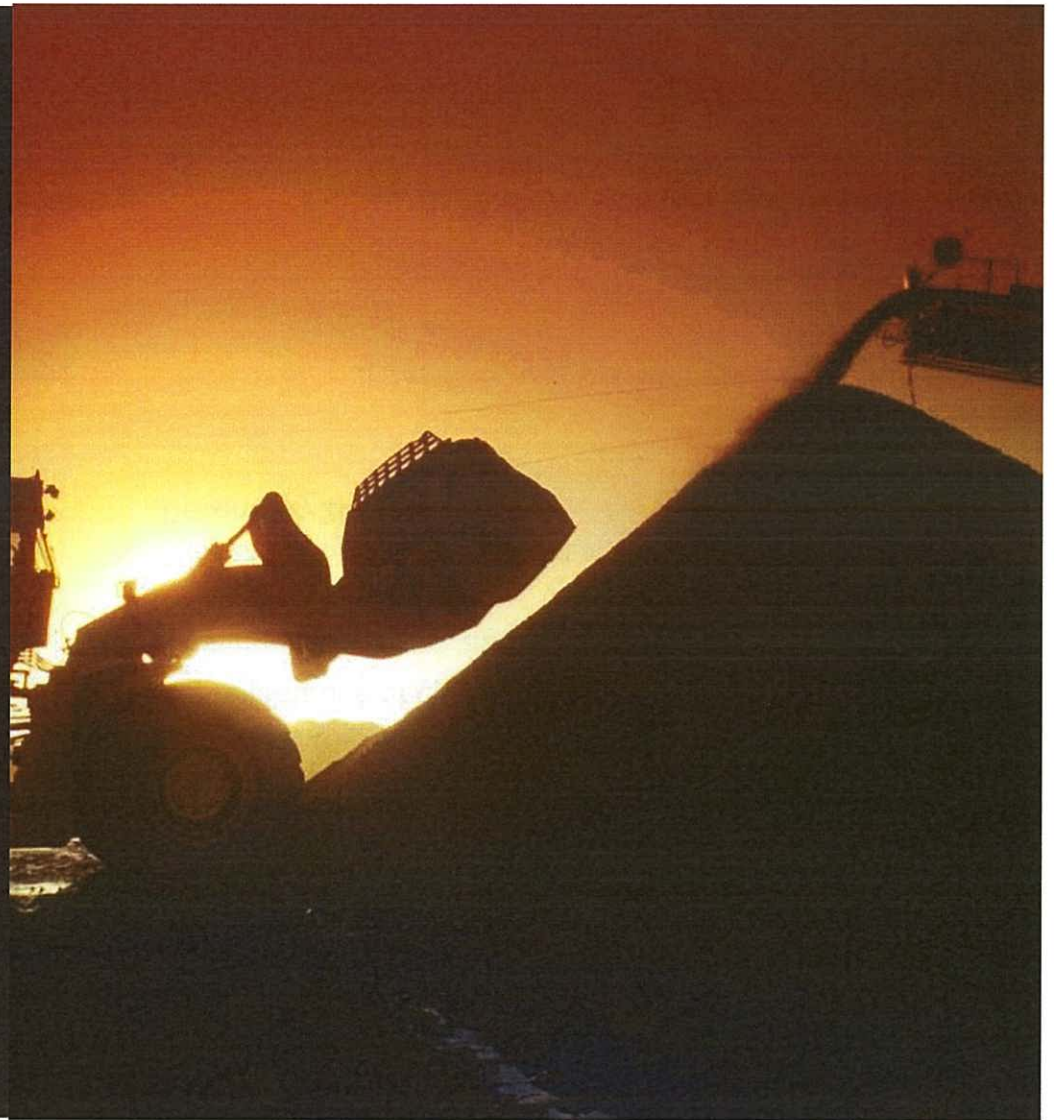
## Objectives

The Resources/Mining sector has experienced decline in positive sentiment among the public, despite the recent uplift in commodity prices and a more positive outlook for the future of the sector. Additionally, this change in public sentiment is also extending to governments with political support for the resources sector less overt than it has been in the past.

As the peak body for the resources sector in the state, Queensland Resources Council (QRC), recognised the need to stop this gradual decline in support for the sector. It was looking to understand what has changed, what is driving negative sentiment and where positive sentiment can be leveraged.

QRC has engaged Ipsos to gain a deep understanding of the drivers of reputation in the Brisbane community to help guide and develop a communications strategy that will increase favourability towards the sector. Specifically, the research set out to:

- Determine how the reputation of the Queensland resources sector can be optimised via targeting, messages, channels and touchpoints.
- Explore and uncover the greatest sources of negative and positive sentiment.
- Identify key influencing factors and key influencers of perception.



# METHODOLOGY

## QUALITATIVE METHOD

16 x 1-hr In-Depth Interviews (IDIs)

- Brisbane Metro
- Fieldwork conducted 12<sup>th</sup>- 16<sup>th</sup> October & 23<sup>rd</sup> – 26<sup>th</sup> October, 2018

**SEGMENT 1: n=5**  
Female teachers aged 35-44 years

Low-mid income

**SEGMENT 2: n=5**  
Female, 35-44 years with children

Mid-high income

**SEGMENT 3: n=6**  
Male/Female, 18-24 years

Young professional or studying in professional area

All segments  
ALP/Soft  
Green voters

## QUANTITATIVE METHOD

Online Survey (n=617)

- Representative of Queensland
- Qualifiers: 18+ years, aware of resources sector
- Fieldwork conducted 26 November - 3 December, 2018



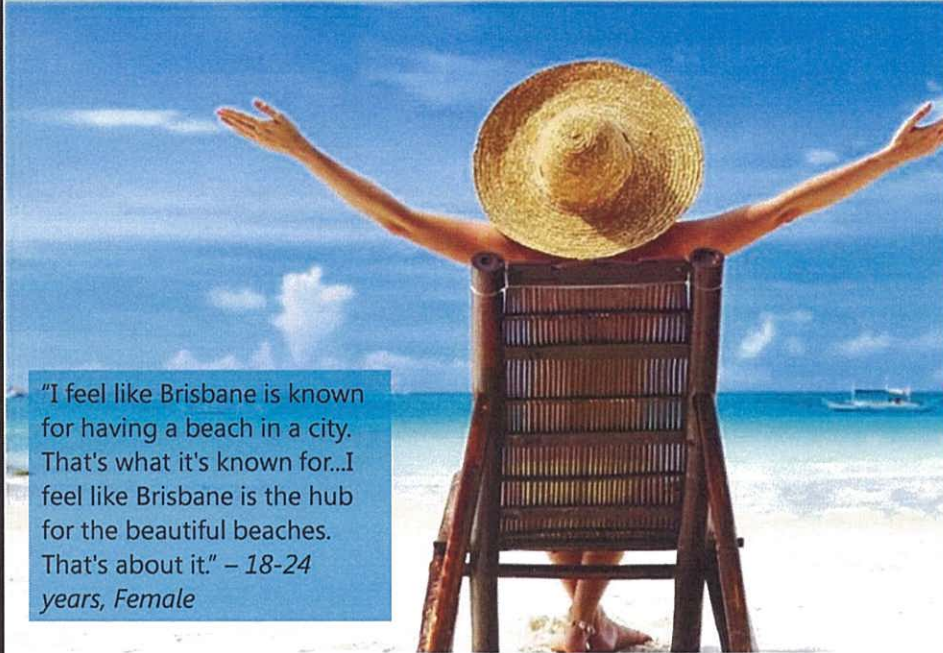
A photograph of a train at night. The train, led by a yellow locomotive with 'QR National' and the number '5516' on its front, is moving along tracks towards the viewer. In the background, a large industrial facility, possibly a steel mill or refinery, is illuminated with bright lights, featuring a prominent curved structure. The sky is dark blue with some clouds. A teal rectangular box is overlaid on the right side of the image, containing the text 'The Brisbane Landscape'. A dark grey rectangular box is overlaid on the left side of the teal box, containing the number '02'.

02

## The Brisbane Landscape



## Positives about living in Brisbane



"I feel like Brisbane is known for having a beach in a city. That's what it's known for..I feel like Brisbane is the hub for the beautiful beaches. That's about it." – 18-24 years, Female



"It's like a little country town. Everybody knows everybody. So many people have grown up here, left and come back... That's what I love about it and I guess you get the benefit of a little country town without having to be regional where you don't have all the services that they have got." – 34-45 years, Female, Teacher

"The weather is... a major attraction. The sunny climate makes me happy" – 34-45years, Female, Children

### **Brisbane is a relaxed, beachside capital city – I love it!**

Queensland is the sunshine state with the warm climate facilitating **outdoor lifestyles, a community feel and friendly disposition.**

The **beaches** across the state are the **pride** of those living in Brisbane.

Brisbane, while still a 'working city', is smaller than its southern counterparts, Sydney and Melbourne. It provides all the benefits of living in a capital city – events, infrastructure – while maintaining a community feel.

For those who have lived in other parts of Australia, Brisbane's pace and size is a key driver of happiness.



Positioning should acknowledge these community values and avoid inadvertently threatening them.



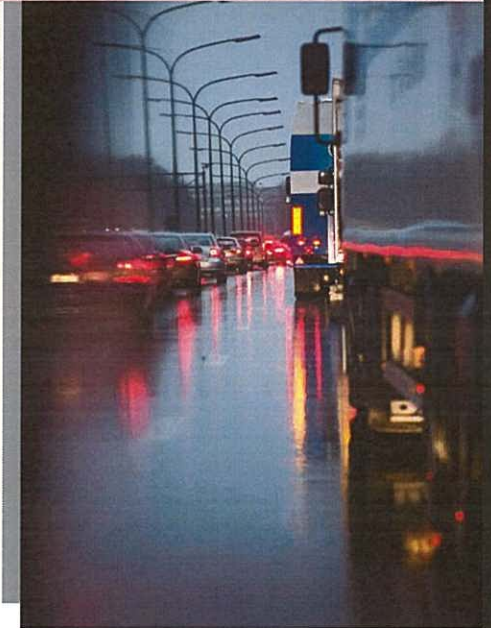
# Concerns about living in Brisbane

## Growth is having some uncomfortable side effects.

As with most cities on the eastern seaboard, Brisbane is experiencing rapid population growth, and the associated growing pains.

Those living in Brisbane are worried about sustainable **employment** opportunities, **housing affordability** and fluctuations, the amount of development in the form of duplexes and units, the increasing amount of **traffic** and **infrastructure** that is **failing to keep up** with the rate of growth, namely **schools, public transport** and **roads**.

There is an underlying **fear of losing the idyllic, laidback lifestyle** so entrenched in the Queensland identity.



Nuanced messaging required, aligning with infrastructure provision and support of population. Caution as a strong growth and progress message may negatively impact these concerns.



The population explosion. I think we are struggling to keep the infrastructure to the standard we need for the rate the population is growing. - *Female, 34-45 years, Children*

Probably the house market, how its going up and up...how am I ever going to afford that. - *Female, 18-24 years*

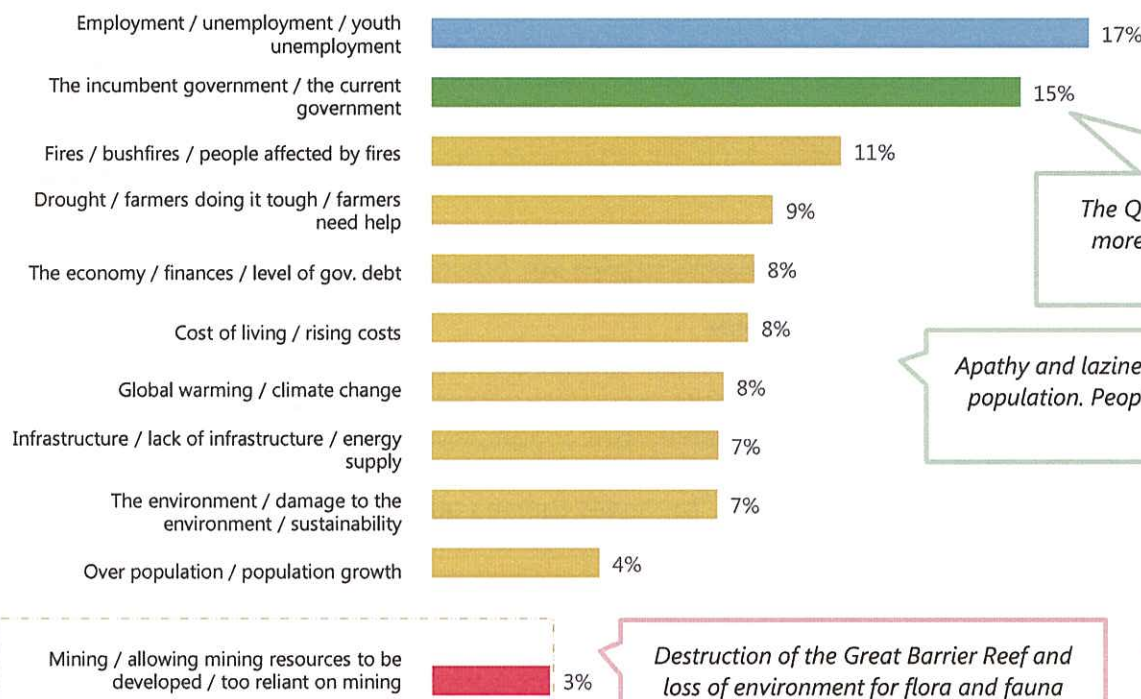
I don't want it to become too much like Sydney. I think we need to maintain the Queensland identity - *Female, 34-45 years, Children*



# Unemployment and job opportunities along with the performance of the state government are key concerns for the population of QLD.

## Mining and related concerns are top of mind for only 3% of the population.

Top of Mind - Unprompted Concerns (Coded) (n=617)



*Job shortage for QLD'ers - hundreds applying for the same position. Education in our town is lacking. If you ask a group of parents which school is better for your children to attend it is hard to get positive feedback for any school here.*

*The Queensland State Government needs to provide more assistance to the state overall instead of just paying lip service to many industries.*

*Apathy and laziness from politicians as well as general population. People are afraid to speak the truth. Too money oriented.*

*Destruction of the Great Barrier Reef and loss of environment for flora and fauna due to mining.*

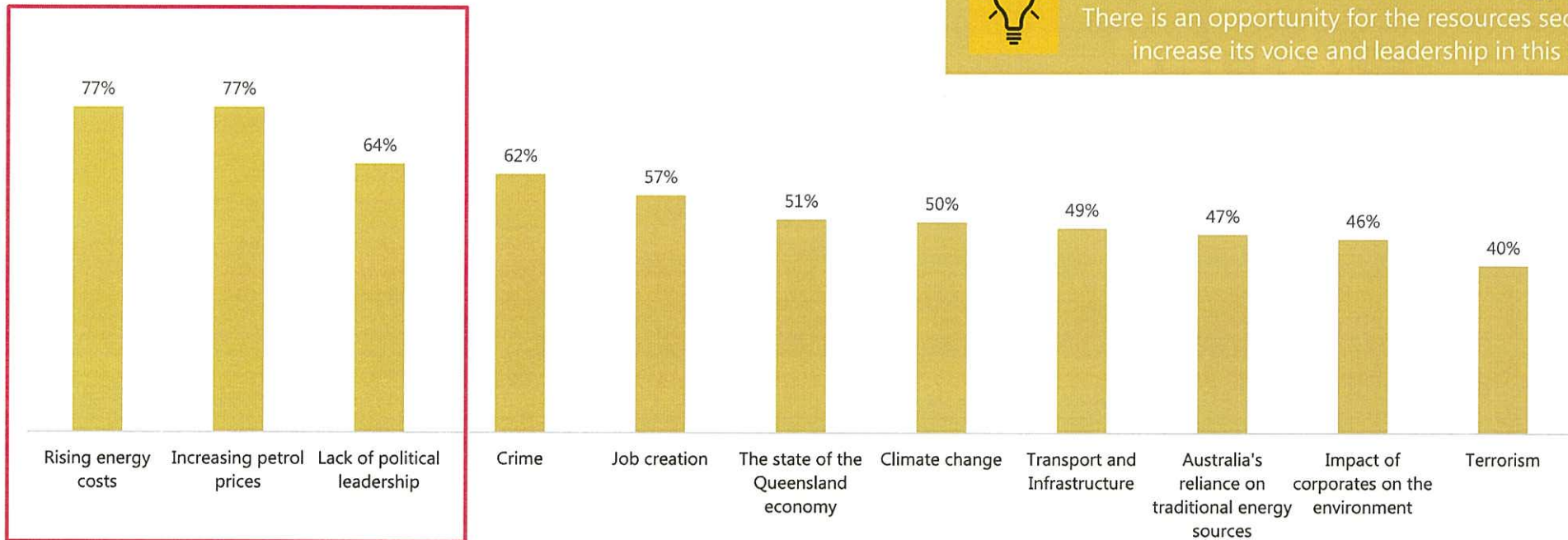
*Coal seam gas and the overall exploitation of our environment, Queensland has amazing places to visit and they need to stay clean and clear of pollution and degradation.*

Q10 | What do you see as the biggest issue facing QLD at the moment? Base: (n=617)



**Rising energy costs and increasing petrol prices are the most concerning prompted issues for QLD'ers. Considering the association between traditional energy and the resources industry, speaking to solutions for these concerns is likely to be well-received.**

**Prompted Concerns (% Very Concerned + % Extremely Concerned ) (n=617)**



Queenslanders are calling for increased leadership and action on energy prices. There is an opportunity for the resources sector to increase its voice and leadership in this space.

Q11 | How concerned are you about each of the following issues in QLD? Base: (n=617)





03

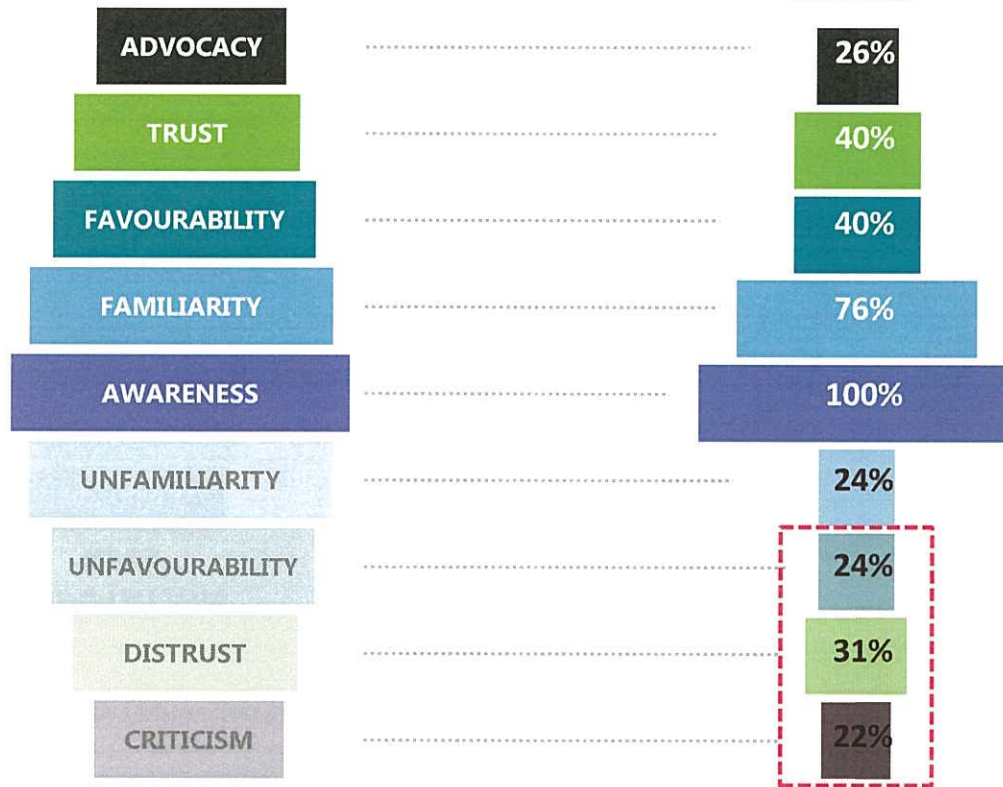
# Reputation of the Resources Sector



Resources Sector Reputation (n=617)



RESOURCES  
INDUSTRY



\*Note: All measures are based off the total sample.

Q1. Awareness (Top four box) | Q1. Familiarity (Top three box) | Q2. Favourability (Top two box) | Q3. Trust (Top two box) | Q4. Advocacy (Top two box) | Q1. Unfamiliarity (Second bottom box) | Q2. Unfavourability (Bottom two box) | Q3. Distrust (Bottom two box) | Q4. Criticism (Bottom two box). Base n=617

The resources sector in QLD  
is nearing crisis.

Negative reputation equity is almost on par with positive, confirming the highly polarising nature of the sector in QLD.

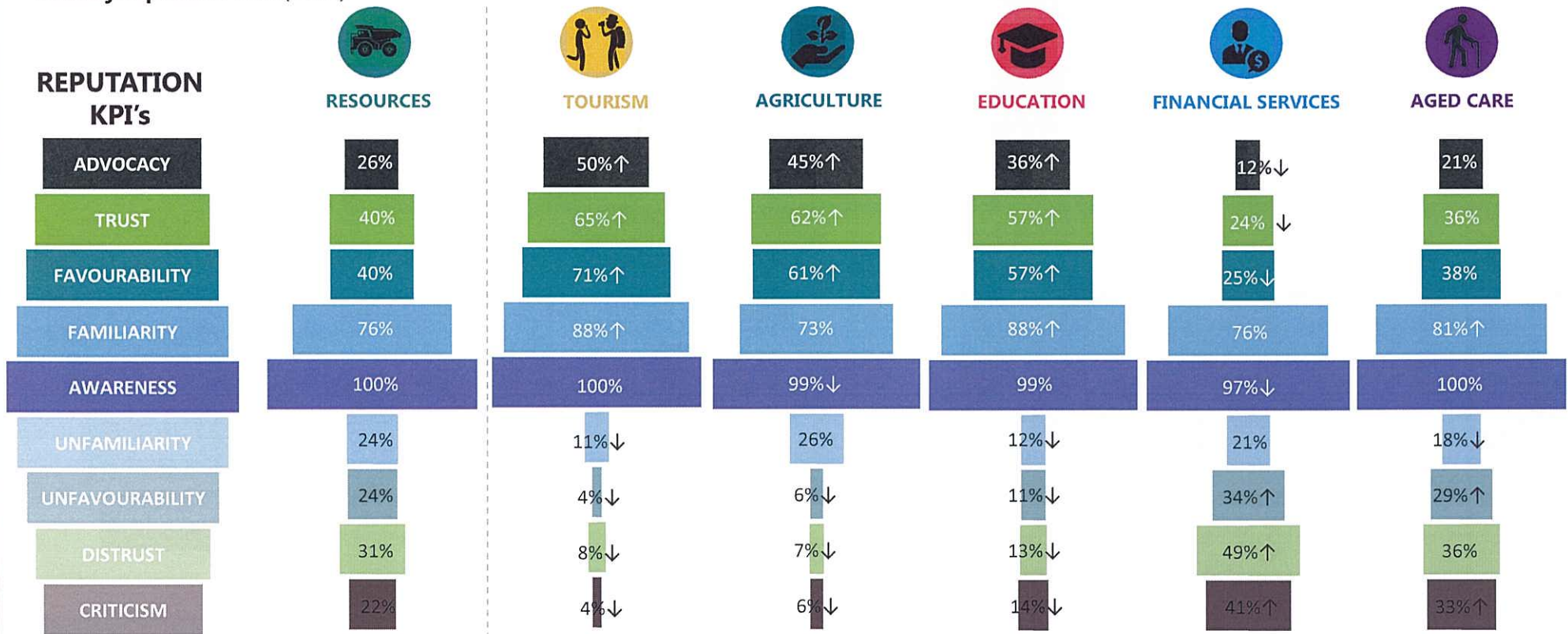
Of concern, is the bulge in distrust (31%), independent of unfavourability (24%), meaning there is a segment of the QLD population that inherently distrusts the sector irrespective of feeling unfavourably towards it.

QRC's concern about the state of the sector in QLD and declining public sentiment is warranted.



In the context of other industries, resources significantly underperforms compared with tourism and agriculture, two other iconic QLD industries. The sector's negative reputation is lower only than that of financial services and aged care, two sectors facing royal commissions.

Industry Reputation KPI's (n=617)



\*Note: All measures are based off the total sample.

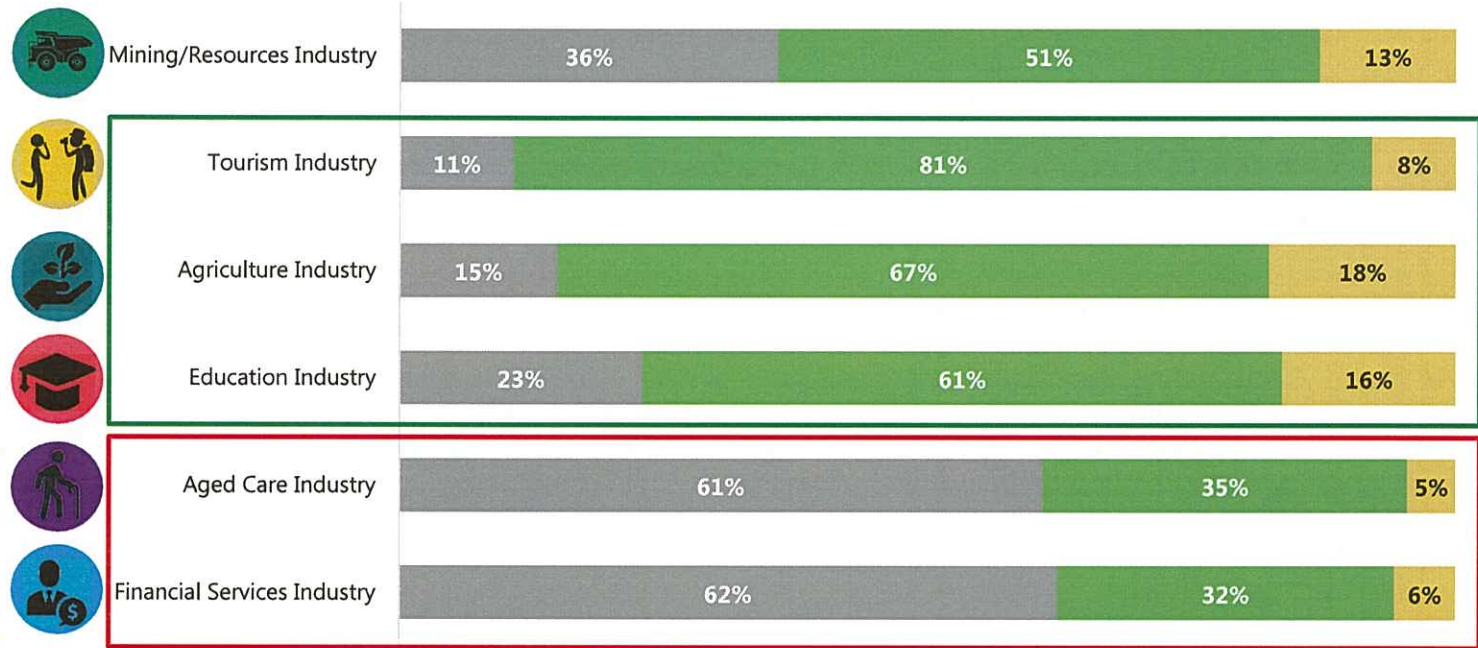
Q1. Awareness (Top four box) | Q1. Familiarity (Top three box) | Q2. Favourability (Top two box) | Q3. Trust (Top two box) | Q4. Advocacy (Top two box) | Q1. Unfamiliarity (Second bottom box) | Q2. Unfavourability (Bottom two box) | Q3. Distrust (Bottom two box) | Q4 Criticism (Bottom two box); Base n=617



**Despite this negative reputation equity, less than two-in-five believe there is too little regulation in the resources sector. For those industries in royal commission (i.e. public government declaration of too little regulation), three-in-five believe there is too little regulation.**

**Perceptions of Industry Regulation Levels (n=617)**

 High levels of negative reputation equity combined with perceptions of a relaxed regulatory environment should act as a warning to the sector. Perceptions of too little regulation are associated with sectors now facing royal commissions.



■ Too little regulation   ■ About the right amount of regulation   ■ Too much regulation

Q9 | How well do you believe each of the following industries is regulated? Base (n=617)



**The resources sector is inextricably linked with traditional energy and these associations are not positive.**





Brisbane isn't really a mining place. Its not really talked about or done here. – 18-24 years, Female



## The resources sector doesn't have an impact on Brisbane...

### ...but what is known, is all about coal.

- The long standing presence of the resources industry in QLD has **not** translated to understanding, familiarity and relevance, especially in the younger segment.
- There is not a strong association between QLD and the resources sector.
- Coal mining and 'dirty' open cut coal mines are the dominant images when thinking about the resources sector.
- This results in the sector being drawn into the debate around sustainability, renewables and traditional (coal) energy.
- Governments are not seen to be leading on this issue, leaving many frustrated and overwhelmed at the gravity of the challenge



There is an opportunity to educate the public on the role of the resources sector beyond coal mining and the traditional vs. renewables energy debate.




## An industry is defined by what it produces and the mental image of the workplace and its relevance to everyday life.

The resources sector is a B2B industry, critical in manufacturing, construction and energy production. Yet, those in Brisbane have little regular interaction with the industry and few have themselves or know someone who has worked in the industry, leaving them unaware of the how the industry impacts everyday life. Where those in Brisbane feel they do have interaction with the sector is via energy companies, and these interactions are not positive.

### BANKING


Characterised as being 'super corporate', focused on profits and not having any physical outputs, but seen as essential to our lives. Negative associations are around the power imbalance to consumers.

 I feel like banking... is just like super corporate. – Female, 18-24 years

*No one likes them but we need them, I guess they're a necessary evil. – Female, 34-45 years, Teacher*

### CONSTRUCTION


An industry essential to supporting a hard-working labour force. Imagery is of high-vis and hard hats building homes and high rises throughout the city, enabling growth.

 *They all wear high-vis...I know that the workers are not particularly skilled.– Female, 18-24 years*

*Construction is important. It's how we get stuff built in this nation. – Female, 18-24 years*

### AGRICULTURE


Perceptions are built on positive images of farmers. Closely associated with the supermarket industry, agriculture is the generation of food and something we all need to survive.

 *Agriculture and supermarkets, it's the food and produce. They are the same for me. – Female, 18-24 years*

*Agriculture is how you get food to supermarkets– Female, 18-24 years*

### ENERGY

Renewable and traditional energy are closely linked as, in the end, they both produce power. The traditional energy sector is viewed negatively and renewable favourably. The resources sector is only associated with traditional energy, not renewables.

 *"They're both energy provision. Even though one is renewable and one is traditional you still get traditional energy companies providing renewable energy." – Female, 18-14 years*



As long as the resources sector is strongly associated producing coal in a distant regional location, it will be challenging to shift public perceptions.



# Imagery of the Resources Sector

The overall mood of the sector is **COLD, CLINICAL, FLAT, SAD and NEGATIVE.**

Lacking relevance and emotional connection, the resources sector is thought of as the top end of town or distant mining communities.

It's the whole, money being linked to success...status symbols. - *Female, 34-45 years, Teacher*

It's controlled from high-rise buildings, people with lots of power money and that kind of thing - *Female, 34-45 years, Children*

A taking away of nature and the habitats that were there... now its going to be mined and all those traditional areas destroyed. - *Female, 34-45 years, Children*

Its not in our faces everyday due to the distance, it's a long road going out to where they have to work. - *Female, 34-45 years, Children*

It's a shiny new road in the middle of nowhere, new equipment and then all of a sudden, they leave it all behind - *Female, 34-45 years, Children*

PROGRESS



BIG BUSINESS

WEALTH



POWER

EARTH

REMOVED



DISTANT



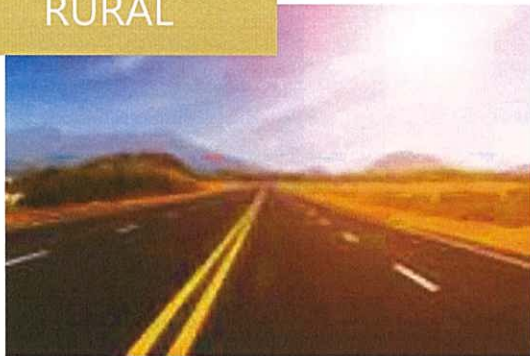


# The imagery of other sectors is warmer and more emotive.

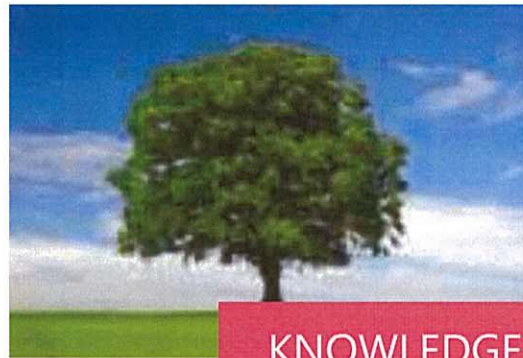
## Agriculture Sector



RURAL



## Education Sector



KNOWLEDGE



WONDER

GROWTH

## Renewable Energy Sector

SUSTAINABLE



BEAUTIFUL



NATURAL



# Understanding of types of mining within the sector

## Coal Mining

Perceptions of the resources sector in QLD are almost entirely based on the strong negative perceptions of open-cut coal mining.

*I think coal mining would stand out as more negative because it is a more dangerous form of mining like it is a lot more explosive and it is just a dirty field to mine like it's just dirty*  
– Female, 18-24 yrs

*I think coal is probably the most negative –*  
Female, 34-45 yrs, children

HIGH IMPACT ON PERCEPTIONS

There are no examples of mining/resources that have a positive association and an impact on perceptions.

NEGATIVE

POSTIVE

For those who are aware of gas/fracking, it is a more neutral-negative perception. That said, it fails to have a significant impact on overall perceptions of the industry as a whole,

## Gas/Fracking

*I will put gas in the middle because... you read conflicting stories about that. You know fracking and the people who are anti-fracking, but then I think it's probably better for everybody to use gas rather than coal.*  
– Female, 34-45 years, children

LIMITED IMPACT ON PERCEPTIONS

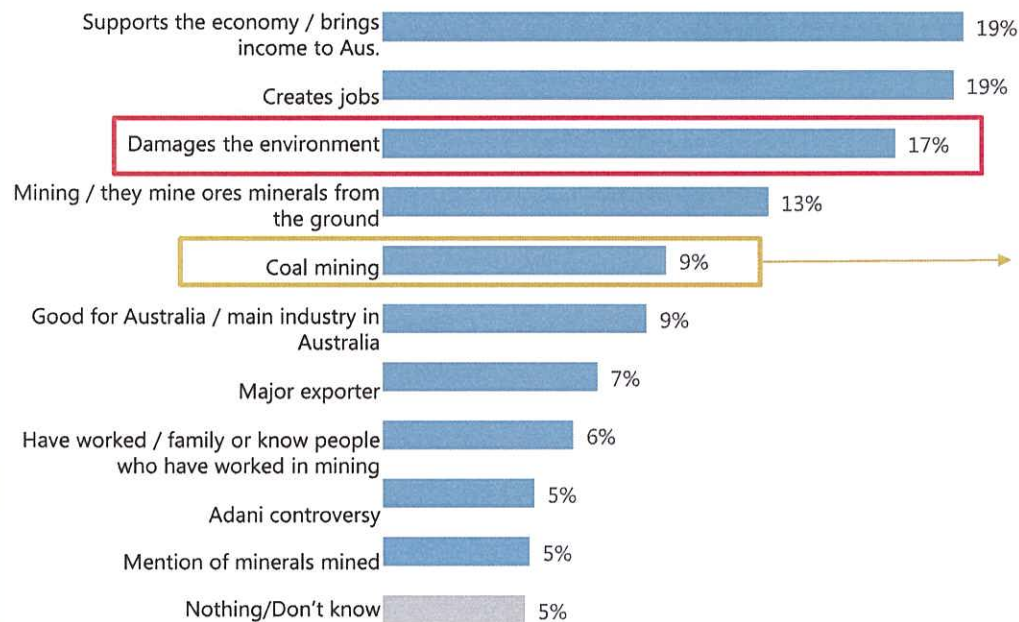
Perceptions of mineral mining are relatively more positive than that of coal mining. There is a reluctant acceptance of the necessity of this type of mining. For the few who were aware of mineral mining in QLD, it has little impact on their perceptions of the sector.

## Minerals (Gold, Bauxite etc.)

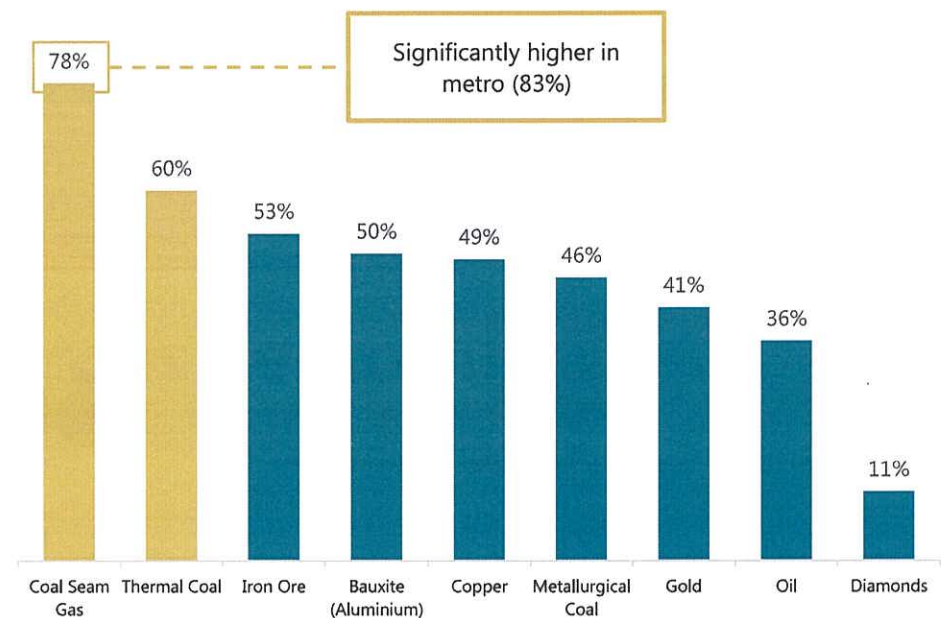
# Associations with the resources sector

- The resources sector continues to be known for its economic contributions and job creation. Of concern, one-in-five know the industry for the damage it causes to the environment; this narrative has had significant cut through and impact.
- While only one-in-10 has coal mining top of mind, it is significantly more well known than other types of mining with coal seam gas or thermal coal being known by 88% of the QLD population.

Unprompted knowledge of Mining/Resources industry (coded) (n=617)



Prompted knowledge of Mining/Resources industry (n=617)



Q5 | What is it that you know about the mining/resources industry? Q20 | To your knowledge, the mining/resources industry in Queensland includes which of the following? Base (n=617)



A photograph of an offshore oil rig at sunset. The sky is filled with dramatic, colorful clouds in shades of orange, yellow, and blue. The sun is low on the horizon, casting a bright glow over the water and the rig. The rig's structure is silhouetted against the bright sky. In the foreground, the water reflects the colors of the sunset. A large, dark rectangular box is overlaid on the right side of the image, containing the number '04' and the title 'Diving into Negative Sentiment'.

04

# Diving into Negative Sentiment



**Wealth** is strongly associated with self-interest, power and influence, the profits that the resources sector generates are considered short-term and benefiting few at the expense of the 'rest of the country' and 'at the cost of our futures.'

The ability to influence political agendas, the 'damage' that companies are perceived to 'walk away from' and the incomes available for unskilled, uneducated workers at the coal face, create a perception that the industry is all about wealth and money.

- A perceived lack of accountability from the sector for the 'damage' it causes and alignment with government suggests a high amount of power and influence which is attributed to the profits generated.
- Individuals associated with the sector such as, **Clive Palmer** and **Gina Rhinehart** continually demonstrate poor family values in the media. This further demonises their wealth and the sector.
- When looking at the incomes in the sector, there is a trade-off at odds with family and community values (e.g. FIFO work), especially when compared with lower salaried industries such as health and education which are always facing budgetary cuts and lack of support from government.
  - This is consistent with perceptions of an unskilled/uneducated workforce earning high wages with young males only considering participating in the sector for the money and short term.
- Thought to be 'narrow-minded' in their business considerations while 'the little people' experience no personal benefit from the wealth of the sector.

*I think the overall feeling of the resources sector is greed, and its easy to put individual faces to it...like your Clive Palmers...Gina Rhinehart – **she looks like the embodiment of greed.** – Female, 34-45 years, Teacher*



**Clive Palmer's coalmine plan scrutinised over impact on Great Barrier Reef**

Alpha North, which would be bigger than Adani's Carmichael mine, to be examined under federal environment laws

*“My husband is a nurse and he doesn't earn that, and he saves lives. It just makes me think that there is such a discrepancy between jobs, industries where there is money to be made. – Female, 34-45 years, Teacher*

*The sector is only about money and self-interest, there's not thought for who or what is being damaged to achieve that gain. – Female, 34-45 years, Children*

*I guess the only appealing thing is, as a young person, in that sector is the money... – Male, 18-24 years*

*It's more that they are not focussing on the bigger picture and that they are doing it now for the money instead of changing it for long term health for the country and the people. – Female, 18-24 years*



**Richiest in world worth \$8 trillion**



# Shareholders are seen as a barrier to sustainability

**There is an innate tension between profit generating entities and their perceived ability to make decisions that benefit the greater good.**

- As an industry compiled of blue-chip companies, perception is that shareholders are the priority and that shareholders do not value and support investment in more sustainable practices because they require increased financial investment in the short term. Associated perception that shareholders are only focused on short term profitability.
- This is further compounded by governments, both state and federal, perceived to be making only short term policy decisions.
- The low levels of latent trust in shareholders creates scepticism about the industry doing the right thing and putting the interests of the broader community (sustainability) ahead of the interests of shareholders.
- Given the amount of money, power and influence in the industry, there is an inherent questioning of motives with a foreboding sense that no one is looking out for the best interests of humanity.



*It would have to be a major shift and they would lose shareholders and they would absolutely have to plan for a massive loss in company profits at least initially and none of them want to do that. – Female, 34-45 years, Teacher*



Put sustainability into commercial context; highlight growing focus on sustainability in the boardroom, increasing understanding that sustainability directly impacts profitability.



*Whoever pays the most, gets the most...they have no interest in change, and they have got the money behind them to ensure that they don't have to. – Female, 34-45 years, Teacher*



*Its not just about money but its about sustainability and sometimes there is a cost associated with doing the right thing but it's the right thing to do for the long term. – Female, 34-45 years, Children*



*The frustration with traditional energy is that you have so many very privileged white middle aged men who have a lot of their income and resources in it. So they are going to continue with it and they are going to do so at the cost of our future. – Female, 34-45 years, Children*



*"I don't understand how, knowing what we know about **climate change**, and knowing what we know about the **advances that are possible in renewables**, how the resources sector can have **so much influence** and support opening new mines or fixing up power stations." — Female, 34-45, Teacher*



There is an opportunity to be bold and address energy/climate change/environmental concerns directly by developing collective and consistent sector-wide messaging to get traction.

## The Energy Debate

There is growing acceptance that climate change and greenhouse gas emissions are problems that we must start addressing together.

- Much of the conversation is about the need and desire to move towards renewable energy, replacing the 'traditional' energy sources.
- The **government is not seen to be taking a leadership** role in this space with the resources sector being aligned with this position.
- Despite some companies like BHP and Rio Tinto taking a bold stance on these issues, they are **not getting cut through** at the community level.
- There is recognition that the resources sector has incredible resources (human and financial), influence and technology and that these should be used to move society towards a brighter more sustainable future.

***It's up to big business, the politicians, the people in power to take some responsibility and make changes.** — Female, 34-45 years, Teacher*





## For many, the impact of mining leaving a regional community and the resultant decline in population is a proof-point of the unsustainable nature of the industry.

Behaviour and perceptions of the sector in local communities, more vulnerable communities, is a projection and personification of the fears and feelings about the impact of resources sector overall and on a larger scale.

### Profit is more important than people

Mining companies don't invest enough in the local communities that they enter. Often thought to 'pull-out for their own self-interest' with little concern for the communities success thereafter.

### Regional towns are too reliant on sector – are we?

The mining industry brings high paying jobs, infrastructure and business success to regional centres. Following the closure of mines, there is no fall-back industry and people leave the communities.

### These towns aren't prepared for rapid growth

The influx in population can forever socially change a town. A highly transient population, there are questions around the community values being preserved.



*You know socially it completely changes a town. Stradbroke Island... all the infrastructure on that island was basically because of mining. But now mining has stopped and **everyone is leaving the Island...** it can cause it to thrive but it can also lead to problems when mining stops. – Female, 34-45 years, Teacher*



Similar to sustainable actions for the environment, the message of why the industry itself is sustainable needs to be amplified and supported by facts.



Other more favourable industries – tourism and agriculture – are compromised by continued mining. There is a sense that efforts should be focussed on these industries instead.



## Tourism is critical to the success of QLD

- Aligned with the identity of QLD as a sunny, beachside state, tourism is thought to be a significant contributor to the economy, providing jobs and international recognition.
- Damage to the Great Barrier Reef particularly is of concern. Preserving Queensland's 'natural' state is very important.
- Tourism and the preservation of the environment are linked to promoting sustainable and diverse ecosystems.



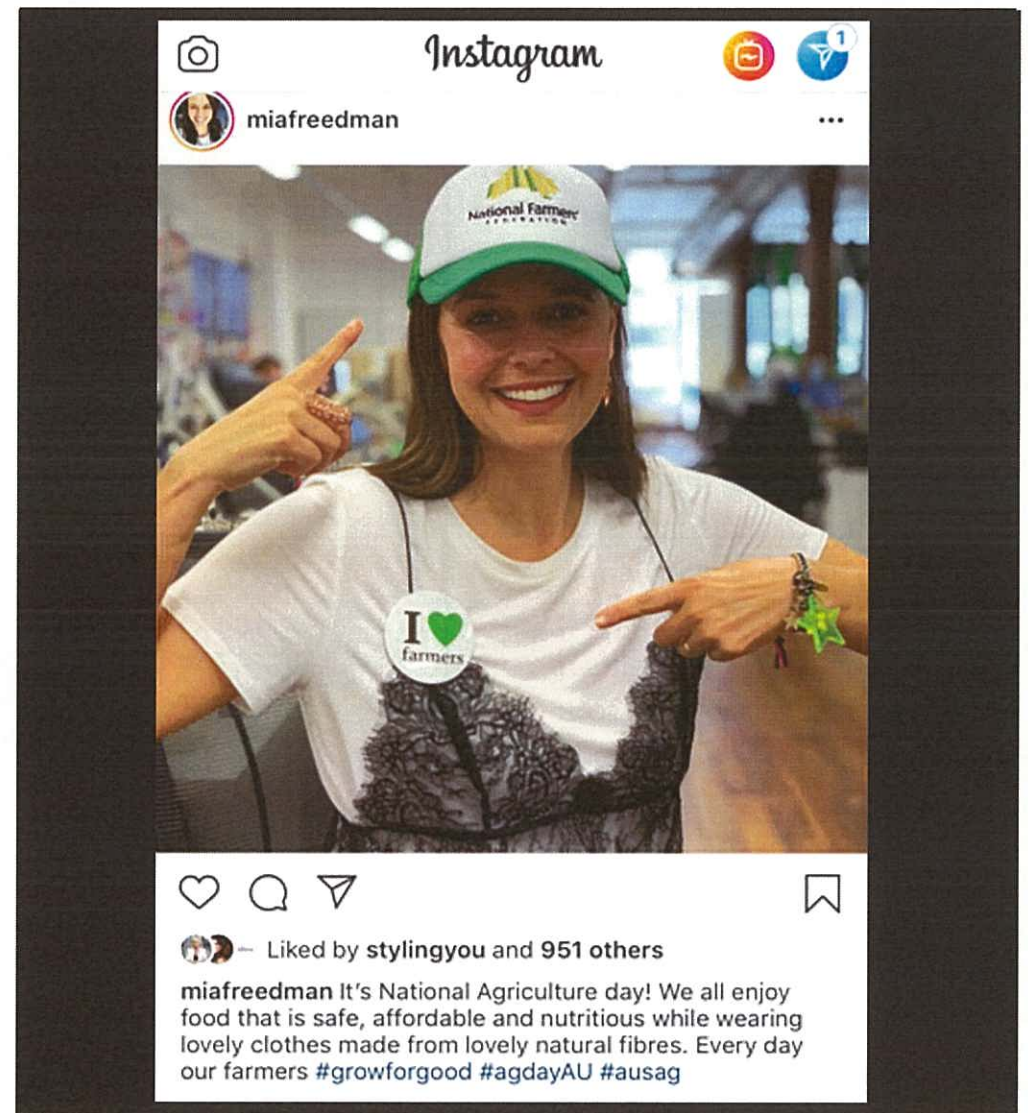
## Land could be used more productively for agriculture

- The resources sector and agriculture are both part of the regional identity of QLD and known to be significant exports for Australia.
- Despite being unsustainable and having a history of demonisation from environmentalists, agriculture has garnered favourability and empathy from the community.
- Using land for mining, **instead** of farming is thought to be short-sighted and unsustainable.
- Mining operations and their impact on water supply and land quality could have adverse impacts on our food.



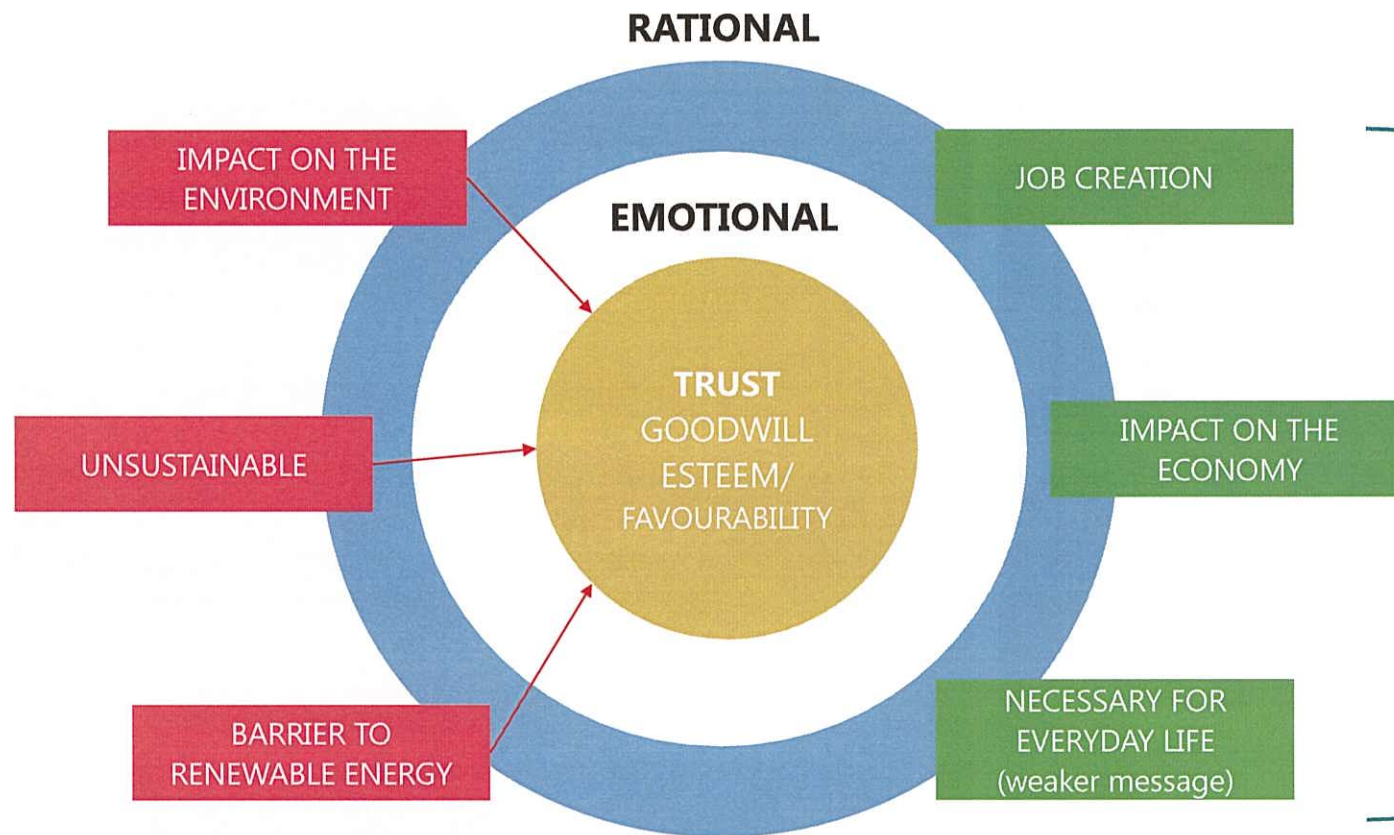
**Agriculture is an example of a sector that has effectively influenced social norms through persuasive value propositioning.**

**It's now enjoying the reputational benefits that flow from making a compelling case.**





Those who less favourable towards the sector are beyond being moved by 'lip service' and while they acknowledge the rational strengths of the sector, they are looking for more to build an emotional connection.



These messages are well known and top of mind for most. There is a positive response to messages but **lacking in personal relevance**, it doesn't shift/translate to an emotional relationship with the resources sector.



*I guess I feel like resources and mining is something I'm more removed from, I mean, we all use the products everyday but its not something I have much personal association with. I don't know anyone that works in that sector. I haven't been to those places where it happens." – Female, 34-45 years, Teacher*



## RATIONAL

## EMOTIONAL

TRUST  
GOODWILL  
ESTEEM/  
FAVOURABILITY

IMPACT ON THE ENVIRONMENT

JOB CREATION

UNSUSTAINABLE

IMPACT ON THE ECONOMY

BARRIER TO RENEWABLE ENERGY

NECESSARY FOR EVERYDAY LIFE  
(weaker message)

Many participants are actively trying to change their behaviour to be more sustainable and have less of an impact on the environment as they believe it to be the right thing to do.

There is an expectation that big business should do the same but isn't.

Job creation and a strong economy has no perceptible impact on participants' lives as they don't work in the industry and the economy is very complex and difficult to understand.

With no B2C connection, the relevance to the everyday is lost.

It is important to link the positive aspects of the sector to personal, tangible benefits and **address** the negative aspects to begin to impact and shift emotional sentiment.





For many participants, the positive impact that the resources sector has on QLD is a rhetoric they are familiar with and have heard regularly in the political arena. While continuing to acknowledge the benefits, these facts are less persuasive and/or begrudgingly and reluctantly accepted.

## Positive impacts of resources

### IMPACT ON THE ECONOMY

- Highly profitable industry
- Accounts for a lot of exports
- Leads to opportunities for QLD
- Supports other essential services such as health and education.



It's the lynchpin of the economy, you switch on the news and you hear a lot about the economy with resources and mining. Its all related. – *Female, 34-45 years, children*

### JOB CREATION

- High paid jobs
  - For the uneducated
  - For regional communities
- Enables people to provide for their families

To supply reliable energy, it basically keeps the power stations running.. – *Female, 34-45 years, children*

Mining is the only one that you can get a really good job and a good income without having an education behind it. – *Female, 18-24 years*

### NECESSARY FOR EVERYDAY LIFE/PRODUCTS

- Associated predominantly with energy, petrol & transport.
- Driving technological development and convenience in life

To supply reliable energy, it basically keeps the power stations running.. – *Female, 34-45 years, Teacher*

Everything, anyone does on a daily basis relies on energy...on coal. So driving, working... – *Male, 18-24 years*

### BENEFIT TO REGIONAL COMMUNITIES

- Provides infrastructure to regional communities
- Helps with over population in the cities
- Provides higher paying jobs to those previously without access
- Stimulates economic growth and development in these areas

Mining builds towns in regional areas encouraging more infrastructure...its spreading [the population] around, creating more areas – *Female, 18-24 years*




Renewable energy and sustainability are top of mind, and seen as a future we should all be embracing. The rhetoric of the resources sector being unsustainable, and its strong association with coal and traditional energy leaves it vulnerable to attack and there is no established narrative to counter this.

## Negative impacts of resources

### IMPACT ON THE ENVIRONMENT

- General environmental degradation from extracting from the ground
- Greenhouse gas emissions from burning coal for power
- Impacts biodiversity and long-term use of land in mining locations

 Obviously, the greenhouse gas emissions from burning that, pollution leads to global warming. – Female, 34-45 years, Teacher

It's a pollutant so at every stage there is environmental damage – Female, 34-45 years, Teacher

### BARRIER TO ADVANCES IN RENEWABLE ENERGY

- Seen to be focussing on continuing to mine rather than invest resources and money into progression of renewables
- Aligned with government in continuing reliance on coal power stations

Switch out the huge profits from mining to be huge profits from renewable energy...and put the jobs into renewable areas. – Female, 34-45 years, teacher

If we started concentrating on renewables...we would have a reliable source of energy and wouldn't need coal. – Female, 18-24 years

### FINITE/UNSUSTAINABLE INDUSTRY

- There is only a finite amount of resource in the ground and continuing to pull it up at this rate will bring the end closer
- Limited renewable energy investment, fear of what will happen if it runs out
- Too reliant on resources/mining

So after the coal is gone, what are we left with? – Female, 34-45 years, Teacher

We actually risk down the track relying on this income...we haven't put in a contingency. – Female, 34-45 years, Teacher

### IMPACTING OTHER MORE FAVOURABLE INDUSTRIES

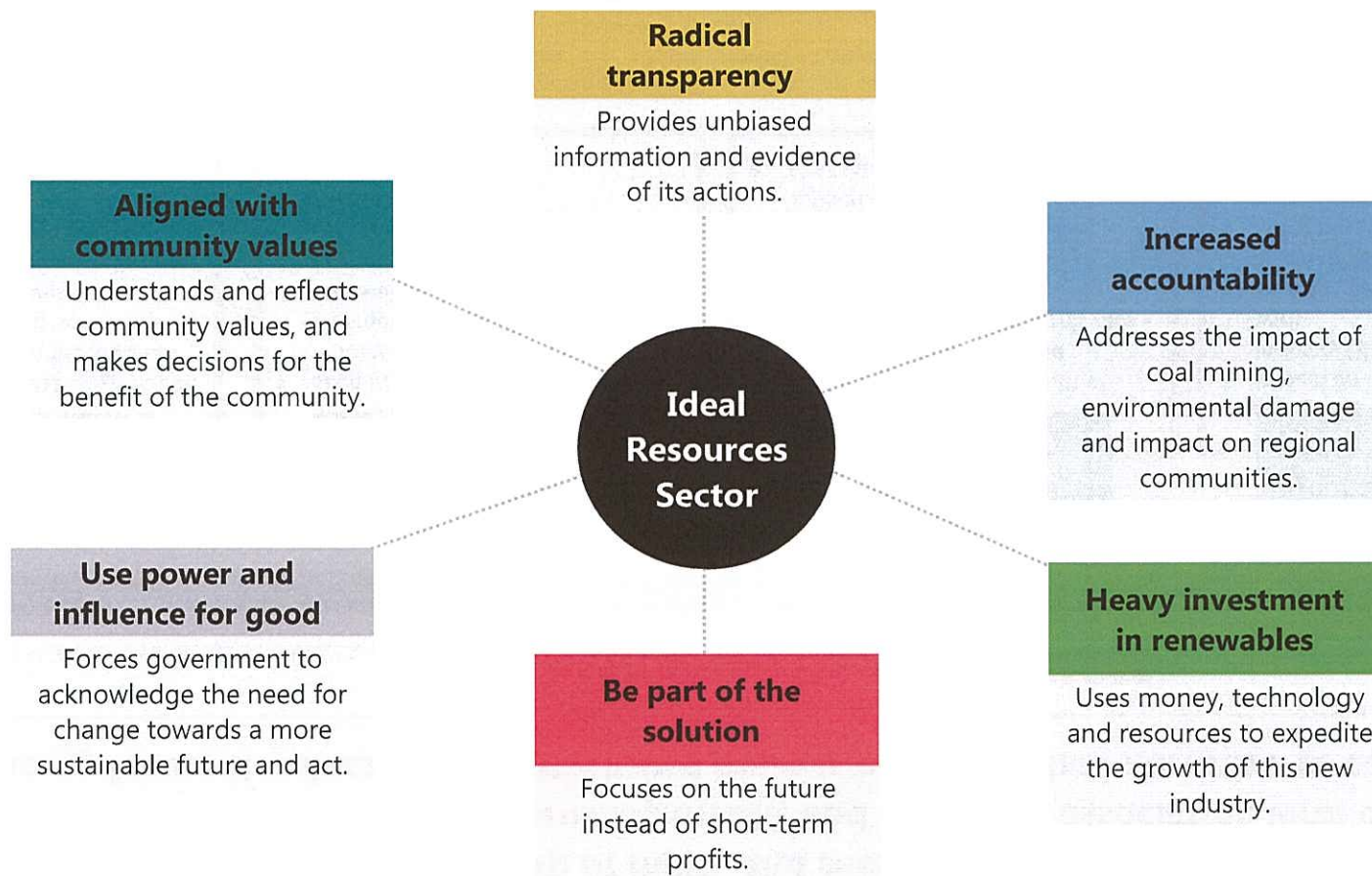
- Impact on GBR and tourism – an industry QLD'ers strongly identify with
- Tourism, seen to be a more sustainable industry than resources
- Using land for mining, prevents it being used for agriculture or tourism

The damage to the GBR and the port they were planning...that's all to do with coal mining. We need to think about our tourism sector – Female, 34-45 years, Teacher

Using land for mining could jeopardise our ability to use the land for another purpose, such as agriculture. – Male, 18-24 years



# The ideal resources sector



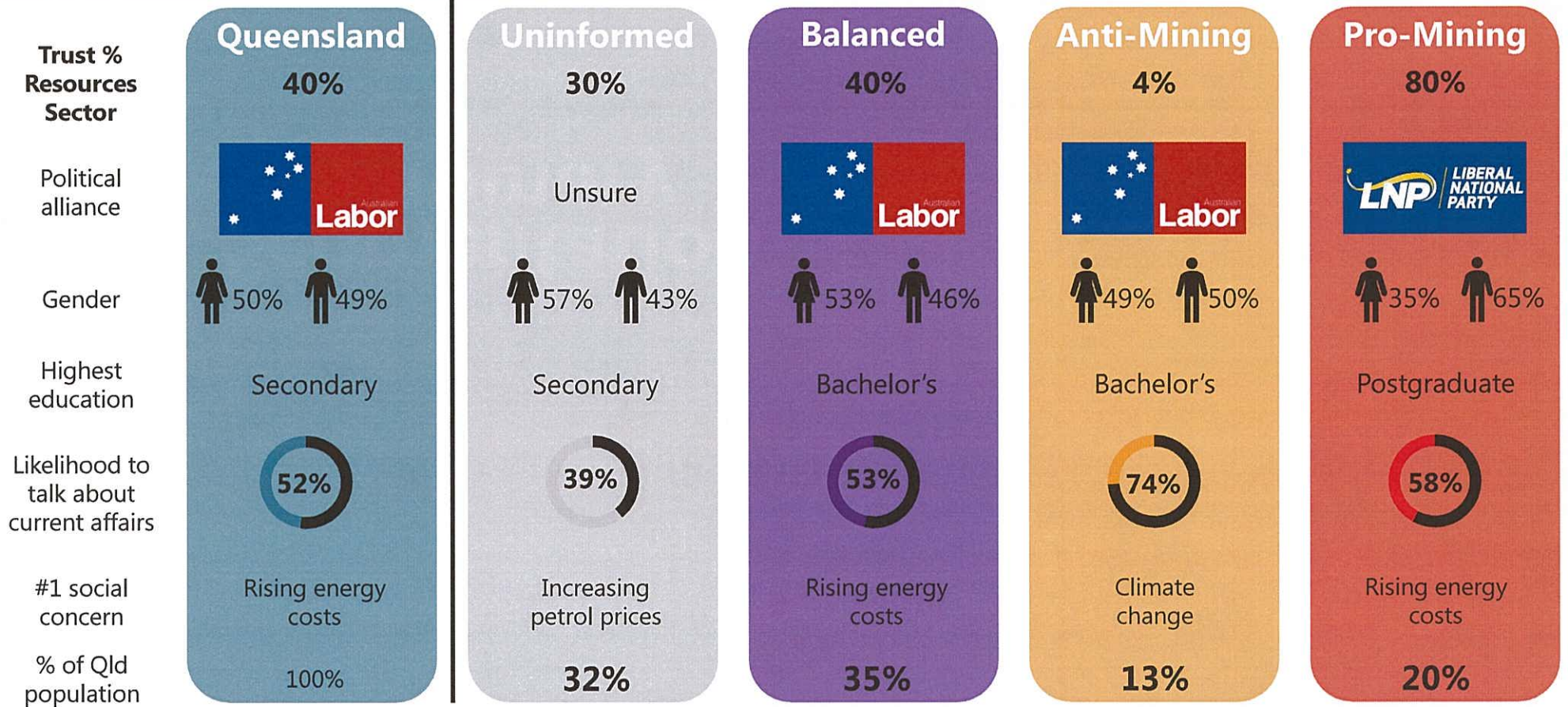


05

## Segmentation Summary

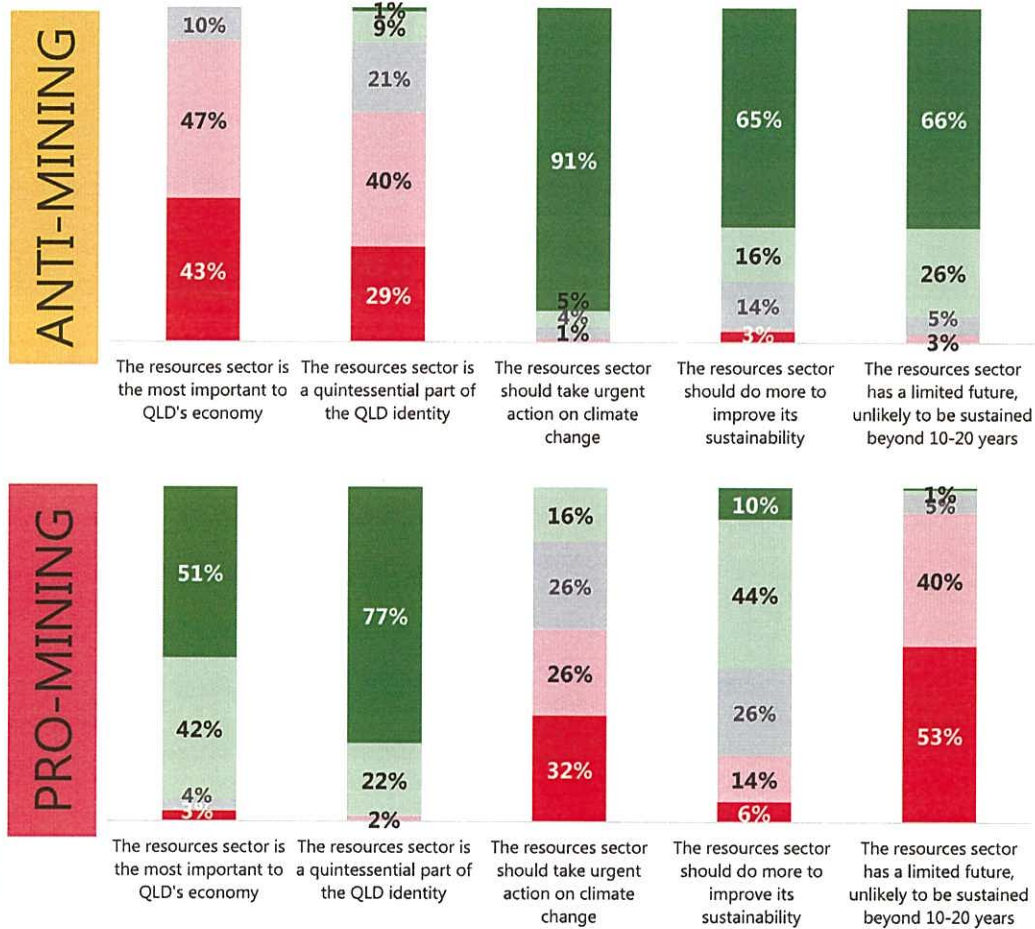


The three segments focused on in the qual are indicative of four broader segments across the QLD population





## Attitudes towards the sector: Segments

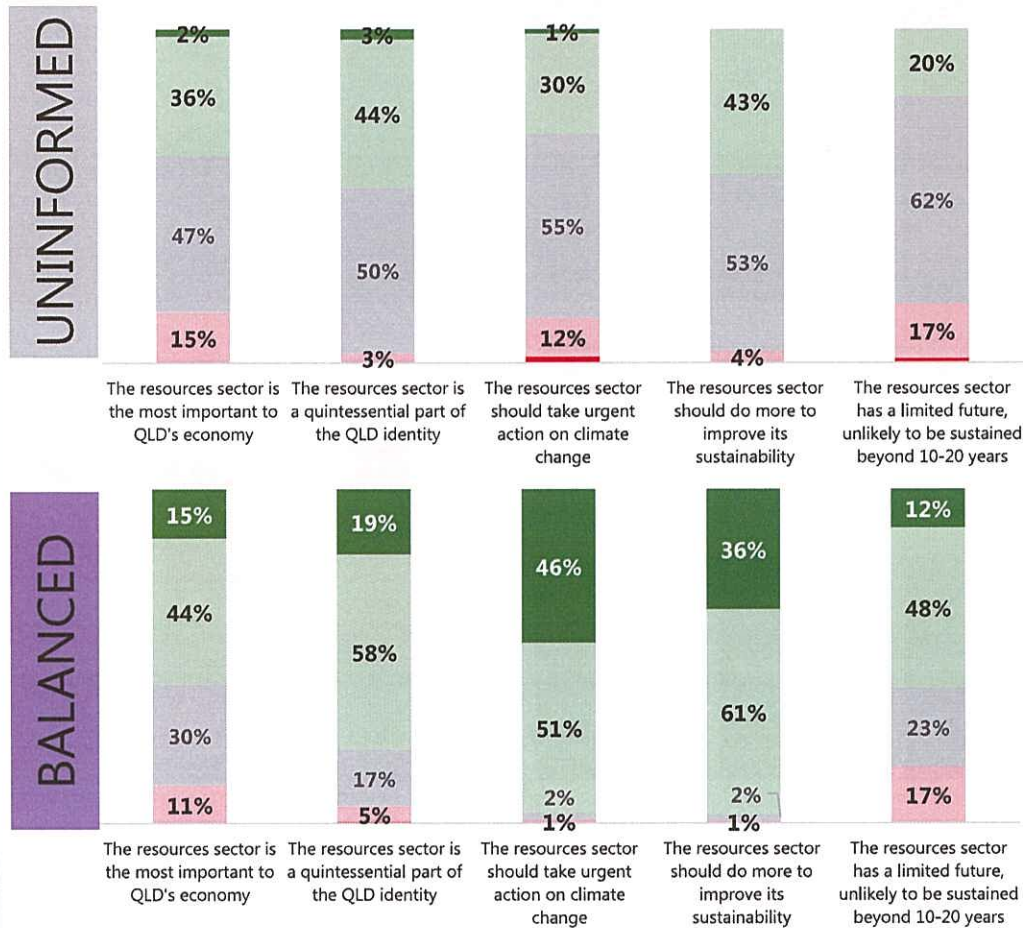


Anti-Mining (13%) **disagree** that the resources industry is important and part of the QLD identity. They **strongly agree** that climate change and sustainability require action and that the industry is unsustainable.

Pro-Mining (20%) **strongly agree** that the resources industry is important and part of the QLD identity. They **strongly disagree** that climate change requires urgent action and that the industry has a limited future. They are **likely to agree** however, that the industry should address sustainability in order to improve.



## Attitudes towards the sector: Segments

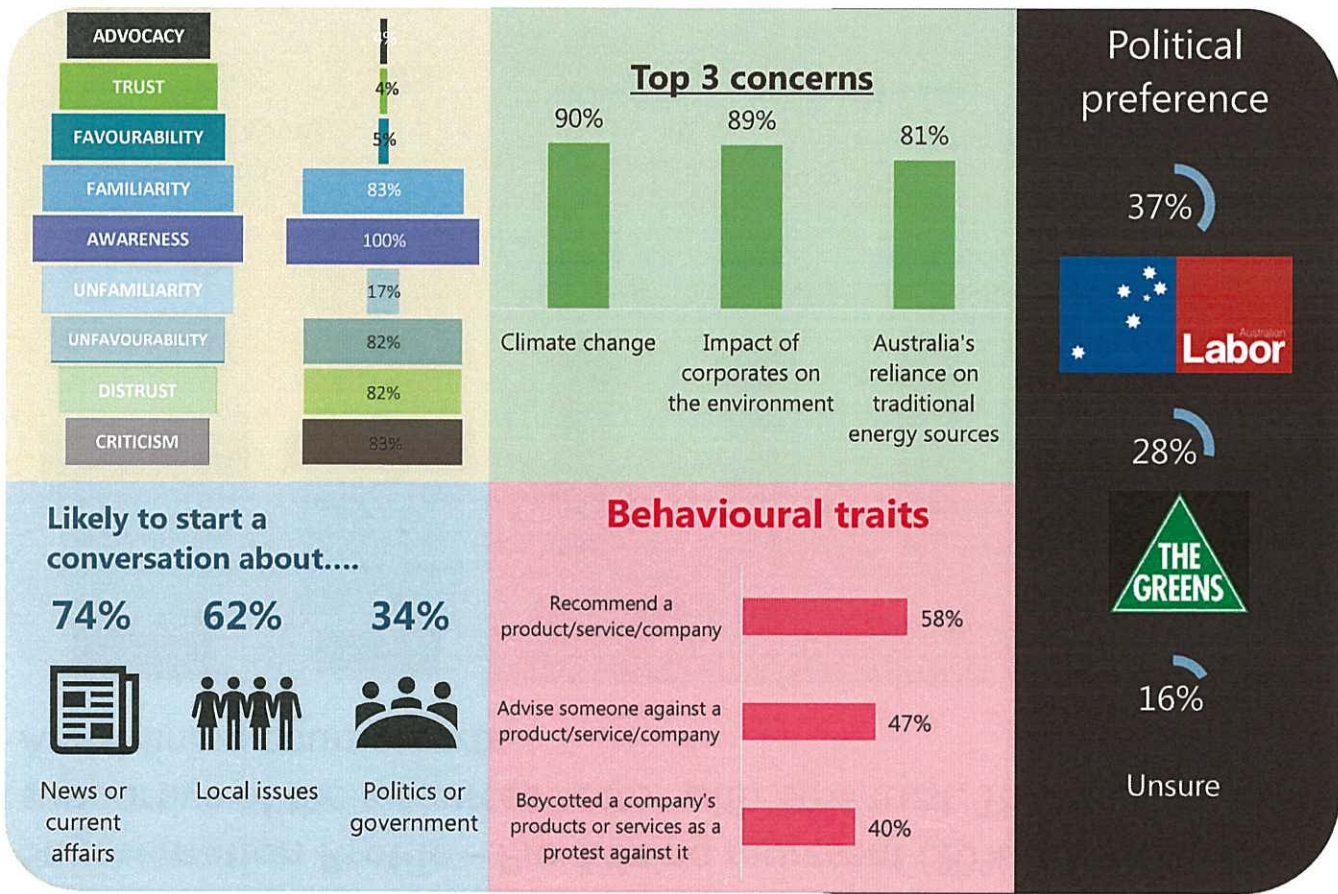


Uninformed (32%) are **likely to neither agree or disagree** or **somewhat agree** on all counts.

Balanced (35%) **strongly agree** that the resources industry is important and part of the QLD identity but they also **strongly agree** that climate change and sustainability require urgent action. They remain unconvinced of the future of the industry.



**Segmentation Profile** – Anti-Mining represent (13%) of the QLD population. This segment has little to no trust in the sector and is very likely to be vocal about opinions and take action based on values.



### Defining qualities

**Reputation profile**

- ✓ 13% of Queensland population
- ✓ Heavily negative towards mining industry

**Concerns**

- ✓ Primarily concerned with climate change and the environment
- ✓ Four-in-five concerned with reliance on traditional energy sources

**Conversation**

- ✓ Three-in-four discuss news or current affairs
- ✓ One-in-three discuss politics or government

**Behaviour**

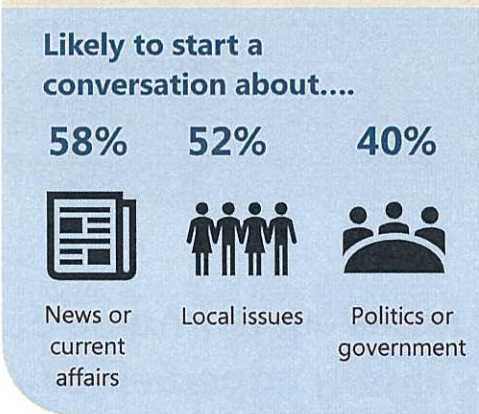
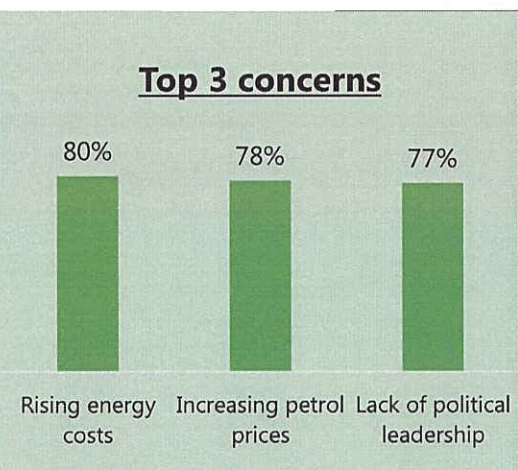
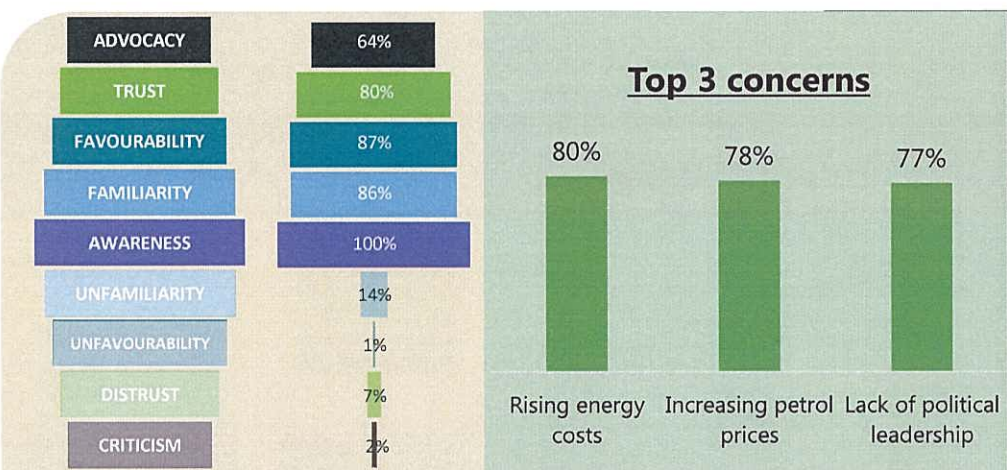
- ✓ Heavily affected by the quality of products or services provided by companies
- ✓ Two-in-five will boycott a company if products or services are sub-standard

**Political preference**

- ✓ Just over one-in-three favour the Labor Party
- ✓ Over a quarter would vote for the Greens



**Segmentation Profile** – Pro-Mining represent (20%) of the QLD population. This segment is very supportive of the resources sector with 80% trust. They are less likely to be vocal compared with their Anti-Mining counterparts.



### Defining qualities

**Reputation profile**

- ✓ 20% of Queensland population
- ✓ Strong positivity towards the mining industry

**Concerns**

- ✓ Primarily concerned with everyday life problems
- ✓ Almost four-in-five are concerned about lack of political leadership

**Conversation**

- ✓ Over half will discuss news or current affairs and local issues
- ✓ Only two-in-five discuss politics despite it being a top-3 concern

**Behaviour**

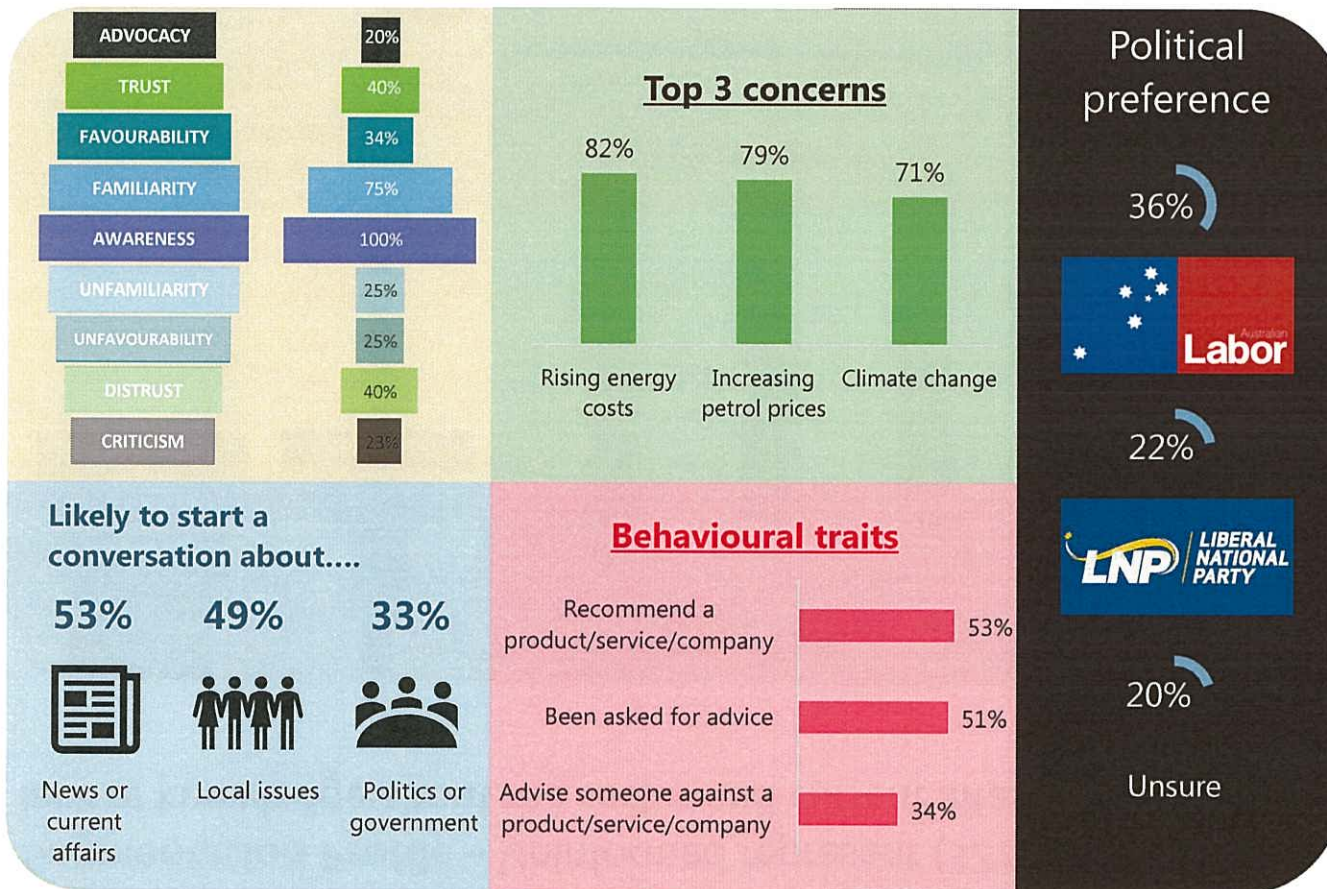
- ✓ Half will recommend a product, service or company
- ✓ Less likely to advise someone against a product/service than anti-mining segment

**Political preference**

- ✓ Two-in-five will vote the Liberal National Party
- ✓ Pro-mining are as likely to vote Labor as One Nation



**Segmentation Profile** – Balanced represent (35%) of the QLD population. This is the largest segment and also presents the biggest opportunity. This segment sees the good and the bad in the industry and is well-informed about news and current affairs.



### Defining qualities

**Reputation profile**

- ✓ 35% of Queensland population
- ✓ Equal levels of positive and negative reputation

**Concerns**

- ✓ Concerned with both everyday problems and global problems

**Conversation**

- ✓ Half discuss news or current affairs and local issues.
- ✓ One-in-three discuss politics or government

**Behaviour**

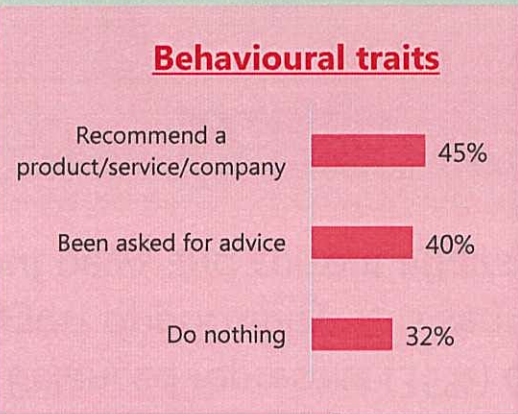
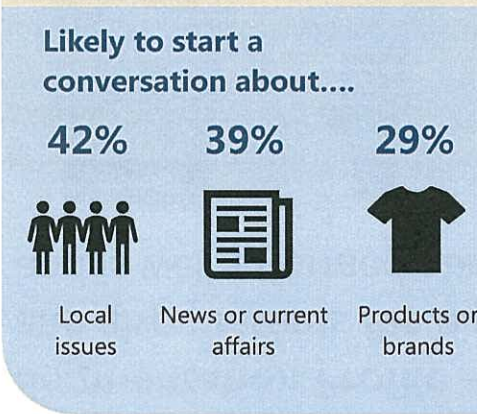
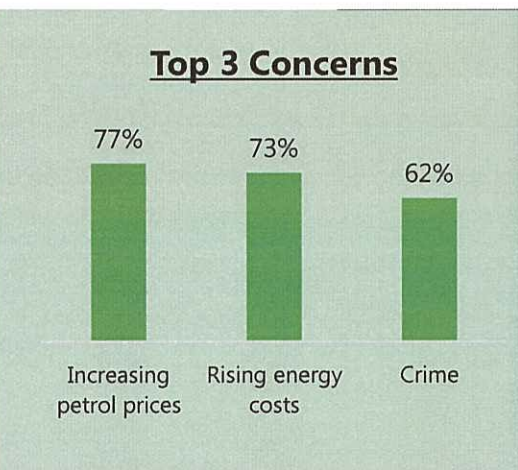
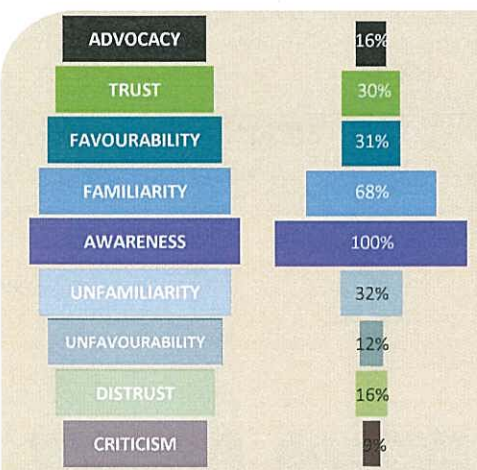
- ✓ Half recommend brands or have been asked for advice.
- ✓ One-in-three will advise against products or companies

**Political preference**

- ✓ Just over one-in-three favour the Labor Party



**Segmentation Profile** – Uninformed represent (32%) of the QLD population. Characterised by their lack of knowledge about the sector and current affairs, they do have a latent trust in the industry.



### Defining qualities

**Reputation profile**

- ✓ 30% of Queensland population
- ✓ High unfamiliarity with mining
- ✓ More trusting than distrusting

**Concerns**

- ✓ Primarily concerned with everyday life problems

**Conversation**

- ✓ Greater interest in local issues than politics or the behaviour of companies
- ✓ Less likely to discuss news or current affairs

**Behaviour**

- ✓ Less than half recommend products or services
- ✓ One-in-three don't advise or make decisions based on company values

**Political preference**

- ✓ Half are unsure about their political preference



**Anti-Mining, Balanced and Uninformed segments are all more likely to be concerned with climate change. The Anti-Mining segment is also highly concerned with Australia's reliance on traditional energy and the impact of corporates on the environment.**

**Prompted Concerns (Ranked) by Segments** (n=617)

		<b>Total QLD</b>	<b>Uninformed</b> (Ranked)	<b>Balanced</b> (Ranked)	<b>Anti - Mining</b> (Ranked)	<b>Pro-Mining</b> (Ranked)
<b>Of Most Concern</b>	1. Rising energy costs		2	1	4	1
	2. Increasing petrol prices		1	2	5	2
	3. Lack of political leadership		3	4	7	3
	4. Crime		5	5	9	4
	5. Job Creation		9	7	6	6
	6. The state of the QLD economy		11	10	10	5
	7. Climate Change		4	3	1	11
	8. Transport and Infrastructure		10	9	8	7
	9. Aus. Reliance on traditional energy		6	6	3	9
	10. Impact of corporates on the environment		7	8	2	10
<b>Of Least Concern</b>	11. Terrorism		8	11	11	8

Q11 | How concerned are you about each of the following issues in QLD? Base: (n=617)



A close-up photograph of a stack of newspapers, showing the edges of the pages and the texture of the paper. The stack is slightly messy, with some pages folded and others protruding. A teal rectangular overlay is positioned on the right side of the image, containing the text 'Sources of Influence'. A smaller black rectangular overlay is positioned to the left of the teal one, containing the number '06'.

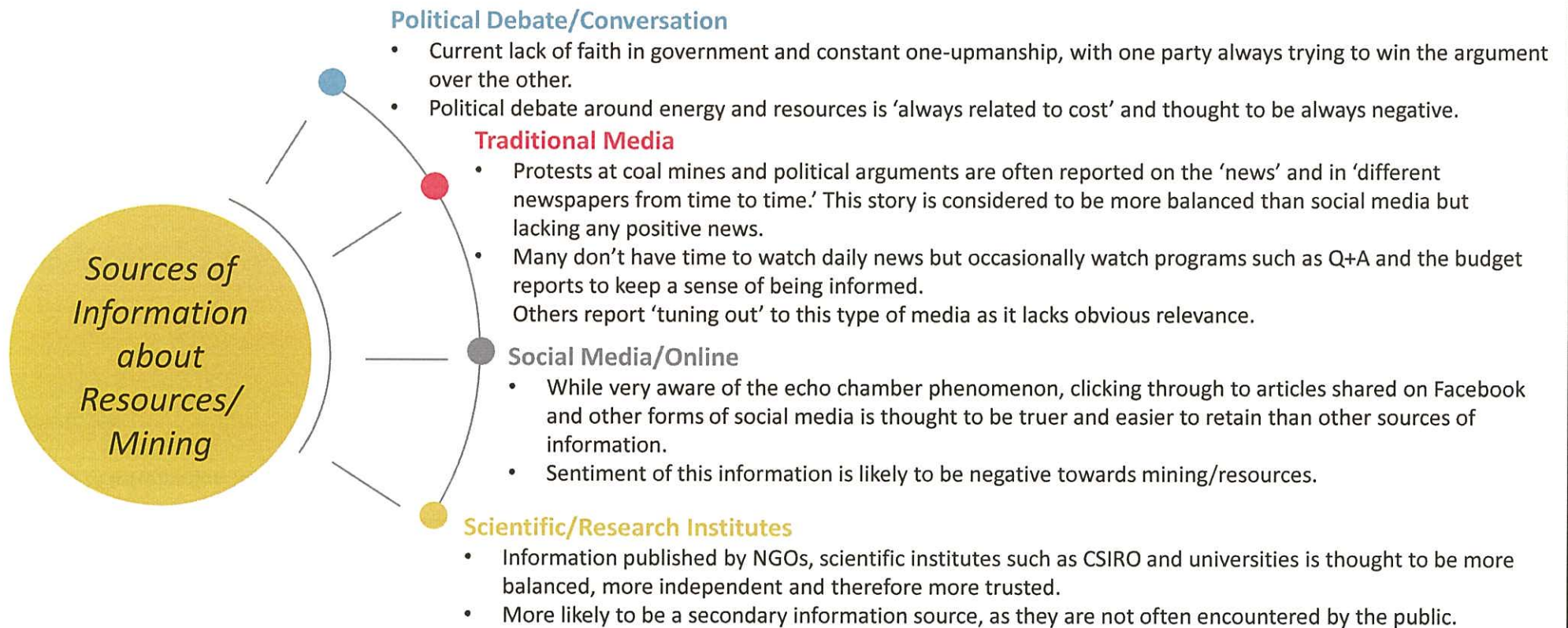
06

## Sources of Influence



# But...where does this opinion come from?

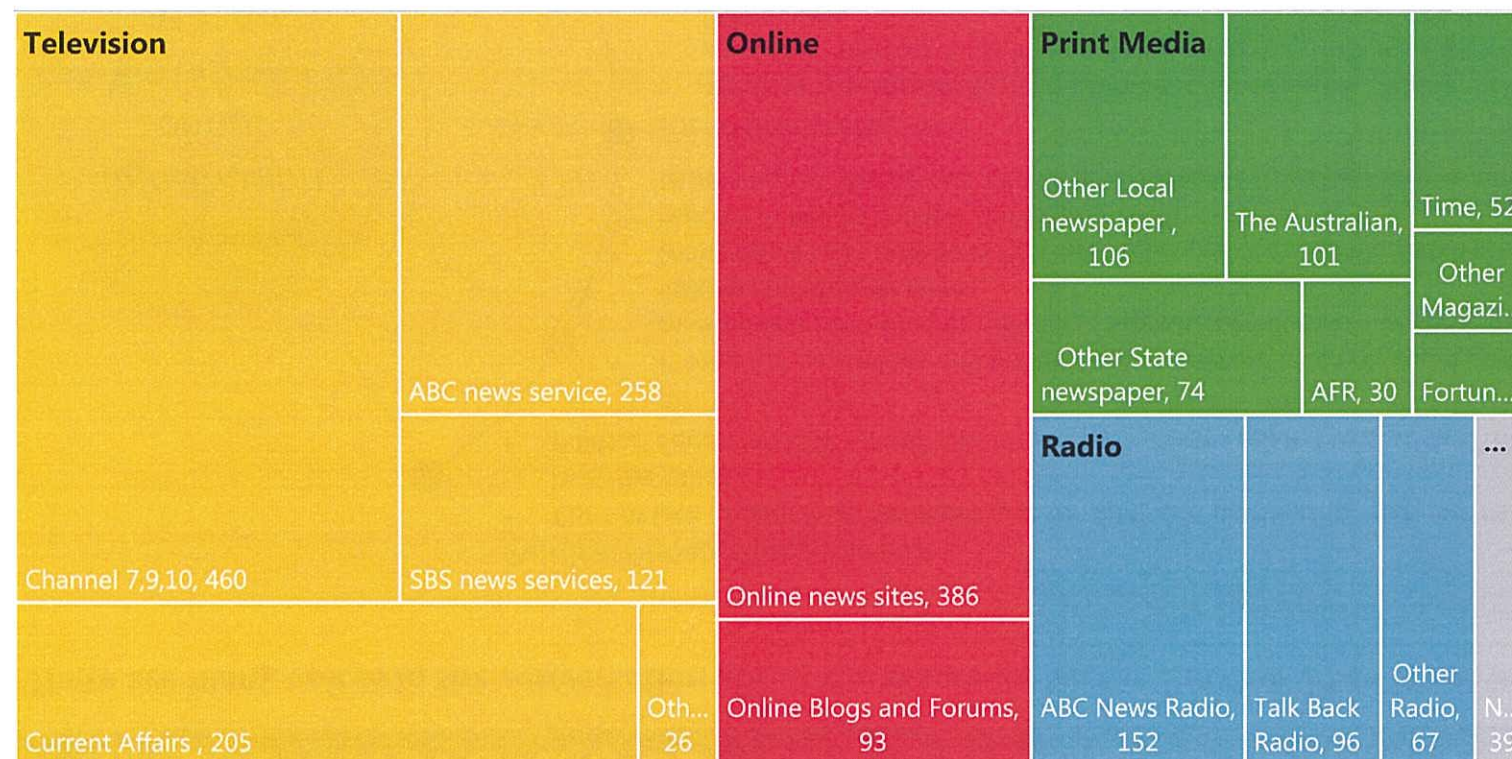
There are many voices in the conversation about the resources sector, but few when it comes to 'trusted voices.'





Not to be underestimated, television, predominantly Channels 7, 9 and 10 are still the main sources of information for the QLD population. Closely followed by current affairs programmes that are often known to air emotive and biased news stories for entertainment. Secondary to television is online news sites.

Sources of Information (counts) (n=617)



- **Other Local newspapers** include – Townsville Bulletin, Morning Bulletin, Toowoomba Chronicle, Fraser Coast Chronicle & Gympie Times
- **Other State newspapers** include – Courier Mail & Sunday Mail
- **Other Radio** includes – Triple J, Triple M, local radio and commercial stations.

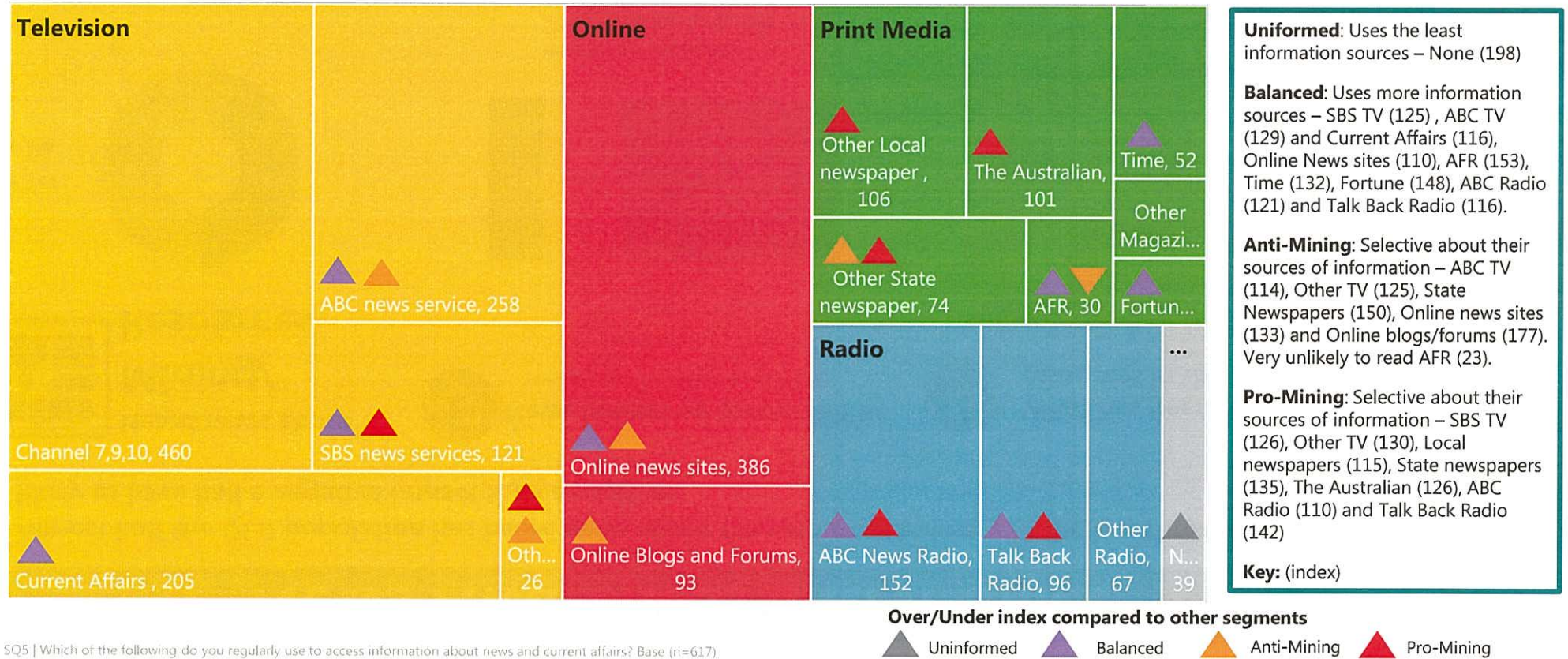
SQ5 | Which of the following do you regularly use to access information about news and current affairs? Base (n=617)



# So...how do we target the segments?

While the **overall profile of media sources between segments remains consistent**, different segments have slight nuances in their likelihood to use different channels and publications to access information. Understanding these differences is key to getting cut through with these audiences.

Sources of Information (counts) (n=617)



SQ5 | Which of the following do you regularly use to access information about news and current affairs? Base (n=617).

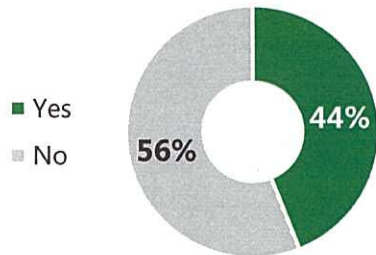


# News Awareness and Impact

Almost half the QLD population has heard news about the resources industry in the last three months. This is more likely to have had a negative impact than a positive.



Heard news about  
**Mining/  
Resources**



**News Impact on favourability**

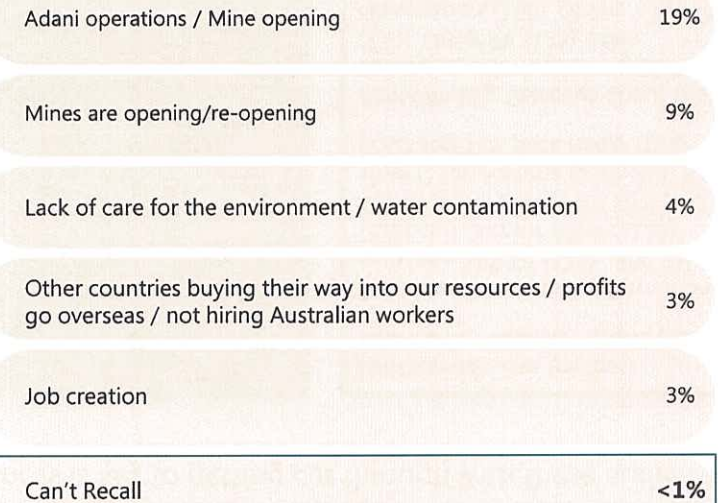
Among those who heard news (n=278)



- Much less favourable
- Somewhat less favourable
- No more or less favourable
- Somewhat more favourable
- Much more favourable



**What has been heard about resources in the last 3 months?**



Q12 | In the past three months, have you heard anything in the news about the mining/resources industry? Q13 | Has what you heard made you more or less favourable towards the industry? Q14 | What news have you heard about the mining/resources industry in the past three months? Base (n=617)



News in this space is very sticky – almost all respondents can recall what they have heard

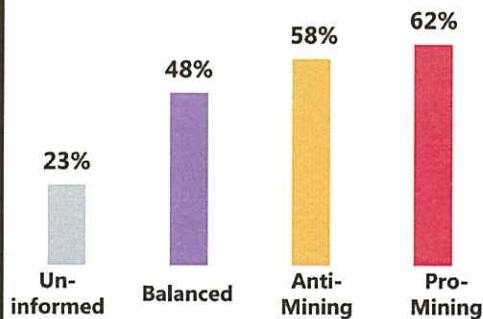


# News Awareness and Impact

Much of the news in the last three months is related to the Adani controversy but perspectives on this issue are varied. This points to the challenge not being with engagement with the media, but rather with how individuals' see the sector aligning with their own values as the same stories are interpreted positively by some and negatively by others.

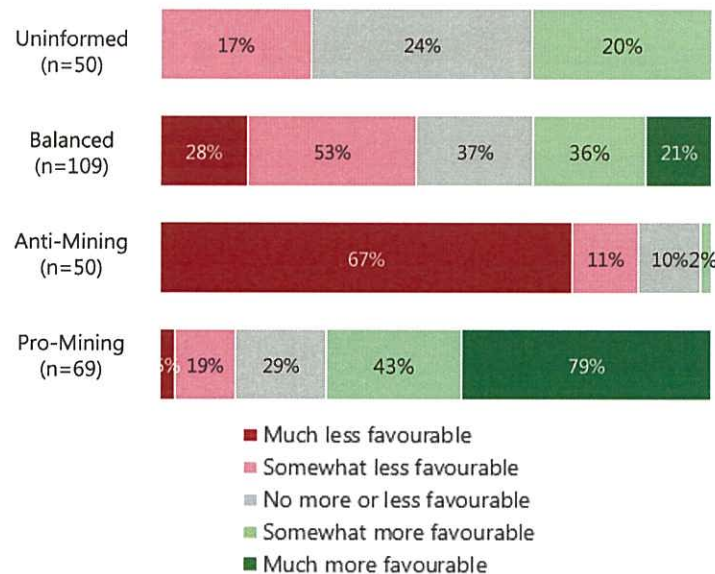


Heard news about  
**Mining/  
Resources**



**News Impact on favourability**

Among those who heard news (n=278)



Hopefully new mines will open, providing jobs for Queenslanders - **Uninformed**

They, not including Adani, are doing their best to blend in with the environment. As for the new proposed coal mine 3km south of Kingaroy CBD where the people have voted twice now 78% against its approval, we still suspect that the people will be ignored, even as the rest of the world states they will not be using coal after 2025 - **Balanced**

Concerns regarding coal seam mining, allowed to come on to people's property and they have no say. Contaminates the water table and wrecks the environment. Lack of care for the environment e.g. allowing overseas companies to invest in our resources, bypass any concerns for the environment and profits go overseas. - **Anti-Mining**

They are going to open new coal mines in Qld which will give thousands more jobs. Rio Tinto has found huge deposits of gold/copper in WA. Great stuff. Go for it. Put all the Greenies who object in jail. - **Pro-Mining**

Q12 | In the past three months, have you heard anything in the news about the mining/resources industry? Q13 | Has what you heard made you more or less favourable towards the industry? Q14 | What news have you heard about the mining/resources industry in the past three months? Base (n=617)



07

# Drivers of Reputation



## Fundamentals

COMMUNICATING OPENLY AND  
TRANSPARENTLY

KEEP COMMUNITY INFORMED

OPERATING WITHIN  
REGULATORY REQUIREMENTS

GIVING BACK TO AUS.  
COMMUNITY

BEING WELL-MANAGED

PROVIDING LONG-TERM  
EMPLOYMENT OPPORTUNITIES

PROVIDING AN INCLUSIVE  
WORKFORCE (EQUAL OPS)

CONTRIBUTING TO THE AUS.  
ECONOMY

USING NEW TECHNOLOGY TO  
IMPROVE OPERATIONS

## Advanced

DEMONSTRATING ETHICAL  
BUSINESS PRACTICES

CONSIDERING THE  
ENVIRONMENT IN OPERATIONS

RESPECTFUL OR ABORIGINAL  
AND TORRES STRAIT ISLANDERS

POSITIVE IMPACT ON  
COMMUNITIES

IMPORTANT TO EVERYDAY LIFE

CONTRIBUTING TO LOCAL  
ECONOMIES

# We need to change the conversation.

The resources sector is a well-established industry that is being challenged to **go beyond the fundamentals** and stand for something more.

- The **fundamentals** are well-known attributes for the resources sector and underperform on importance to trust (and reputation) compared with their performance.
- The **fundamentals** represent the big-picture, rational contributions of the sector in society and have been established for some time.
- The **advanced** attributes reflect the personal relevance and values held by much of the population.
- It is no longer enough to deliver on the **fundamentals**, the sector must now aim higher and start to tell a story that encompasses these more **advanced** attributes.

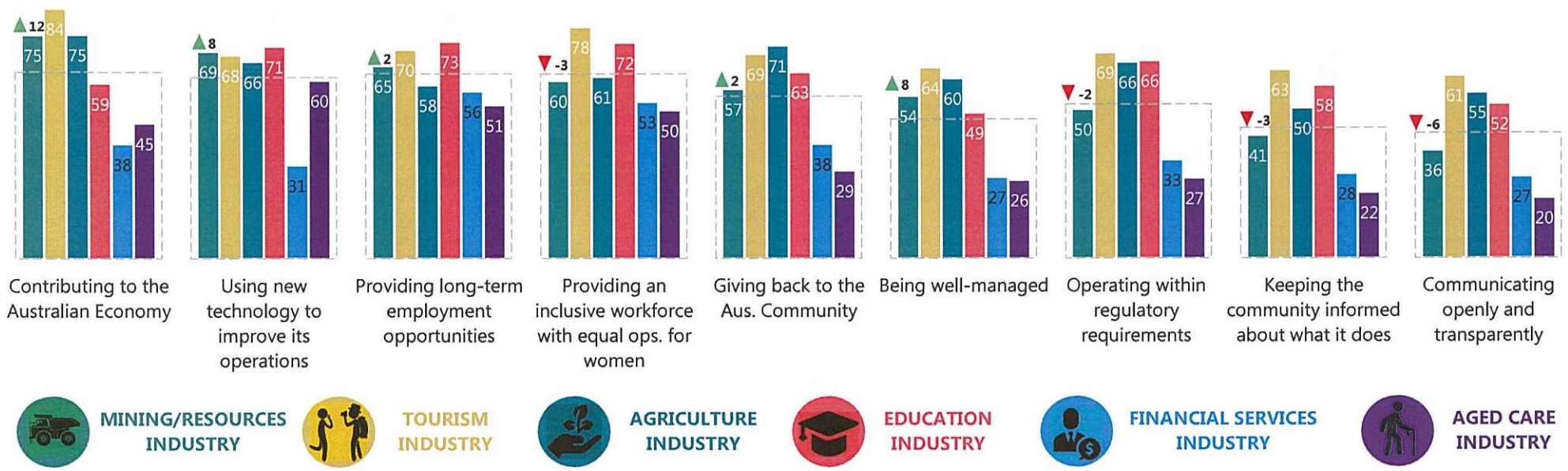


Consistent with top of mind associations, the resources sector performs strongly on economic contribution and employment opportunities. However, more favourable sectors like, tourism outperform resources on almost all fundamental attributes except use of technology.

When looking at communication attributes, resources performance is more in line with royal commission industries.

Drivers of Reputation by Industry (n=617)

**Fundamentals**



Q7 | How would you rate each of the following industries on each of the following attributes? Base (n=617)

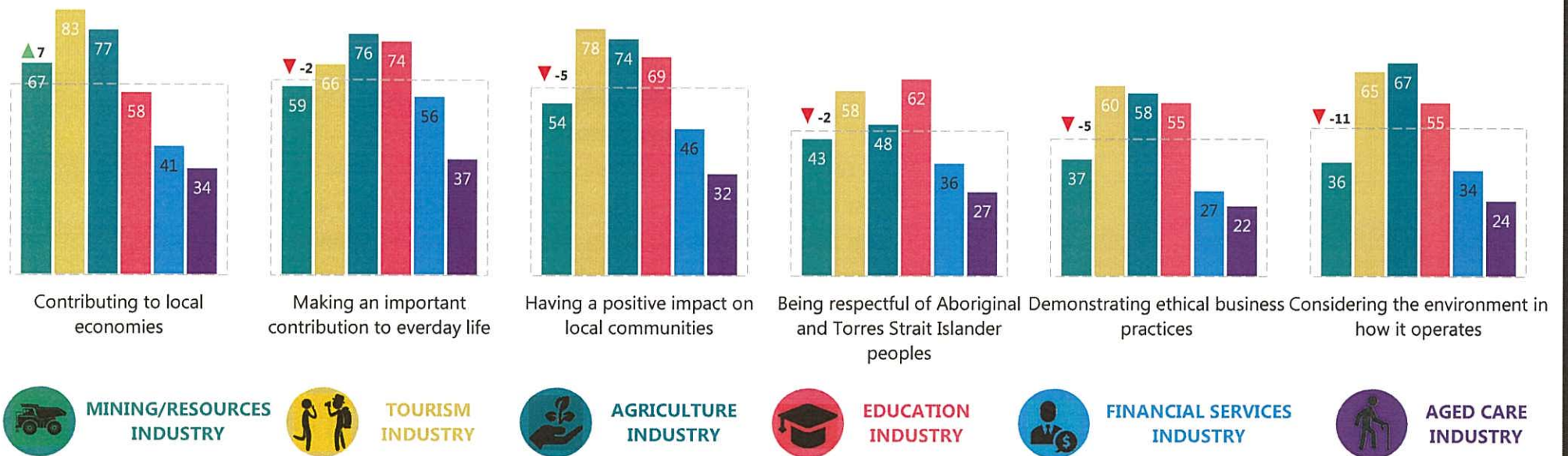
▲ ▼ Indicates distance from average.



The resources sector underperforms on most of the advanced attributes, especially compared with the more favourable industries of tourism, agriculture and education. Aside from its contribution to local economies, the mining/resources industry is more closely aligned with the royal commission industries.

Drivers of Reputation by Industry (n=617)

Advanced



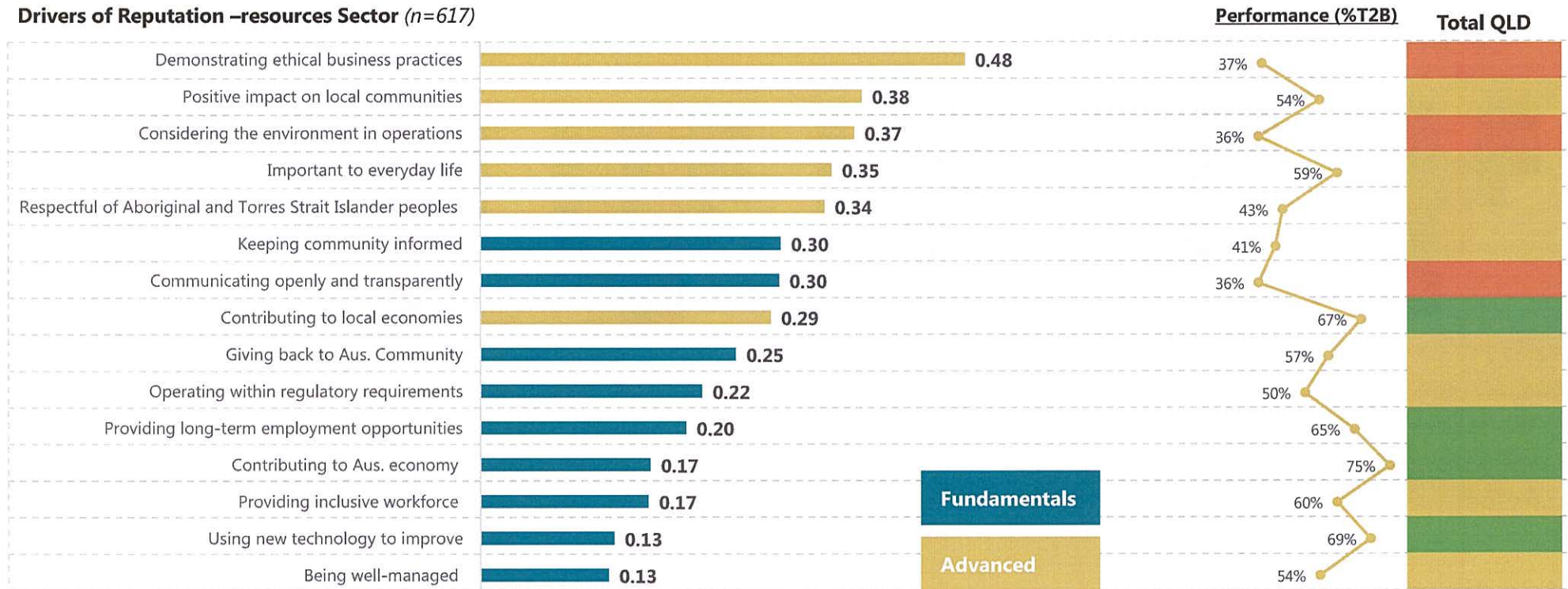
Q7 | How would you rate each of the following industries on each of the following attributes? Base (n=617)

▲ ▼ Indicates distance from average.



The sector performs poorly on some of its most important attributes and strongly on those attributes less important in driving reputation. This confirms that the old narrative around the sector is no longer impacting the public.

Drivers of Reputation –resources Sector (n=617)



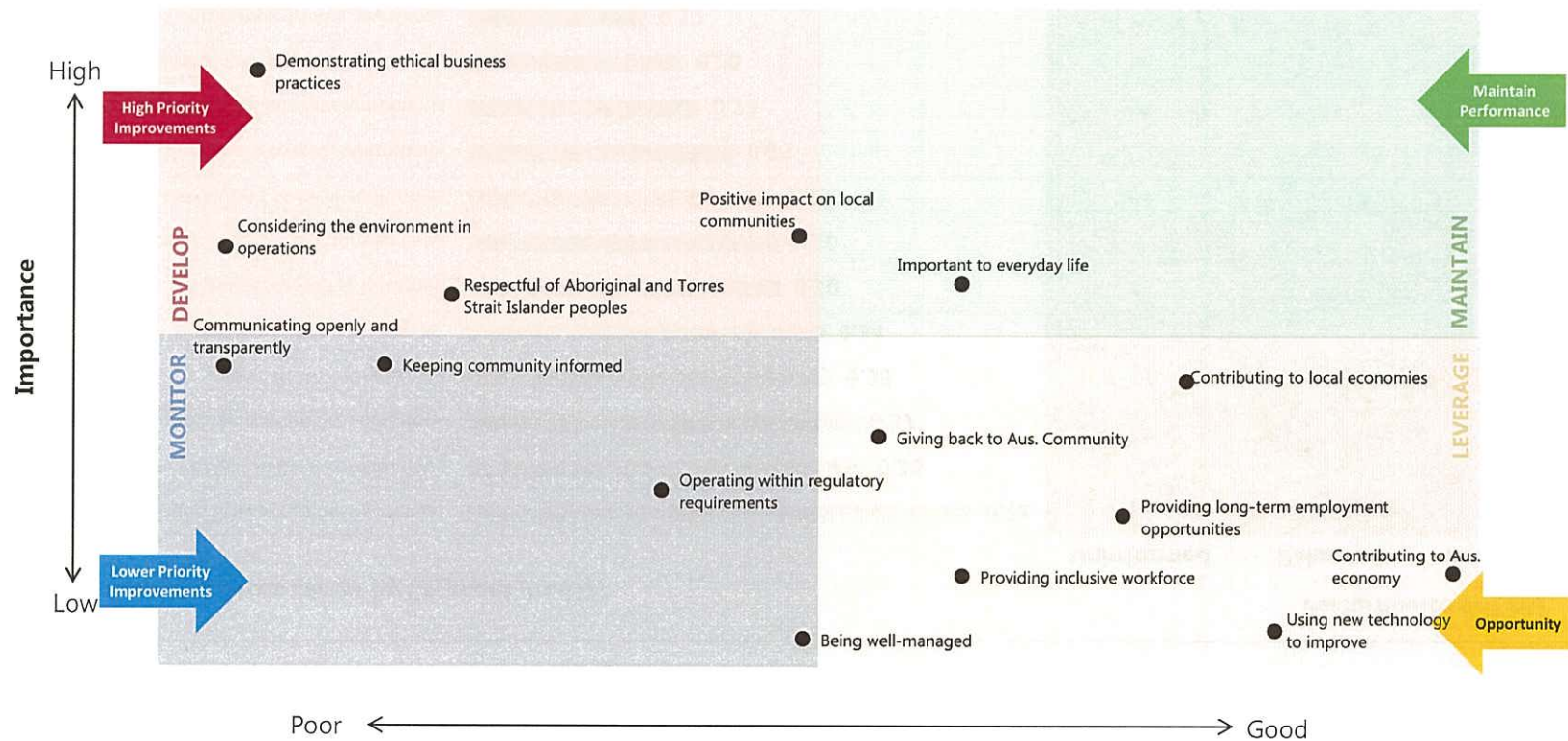
**Key**  
 Strong Performance (80%+)    Good Performance (61-80%)    Average Performance (41-60%)    Below average Performance (21-40%)    Poor Performance 0-20%

Q7 | How would you rate each of the following industries on each of the following attributes? Base (n=617) R<sup>2</sup> = 0.63



**High priority improvements are key to establishing a compelling new narrative. Demonstrating ethical business practices, communicating the work already being undertaken in the environmental space and addressing concerns about impacts on the local community are opportunities to shift perceptions.**

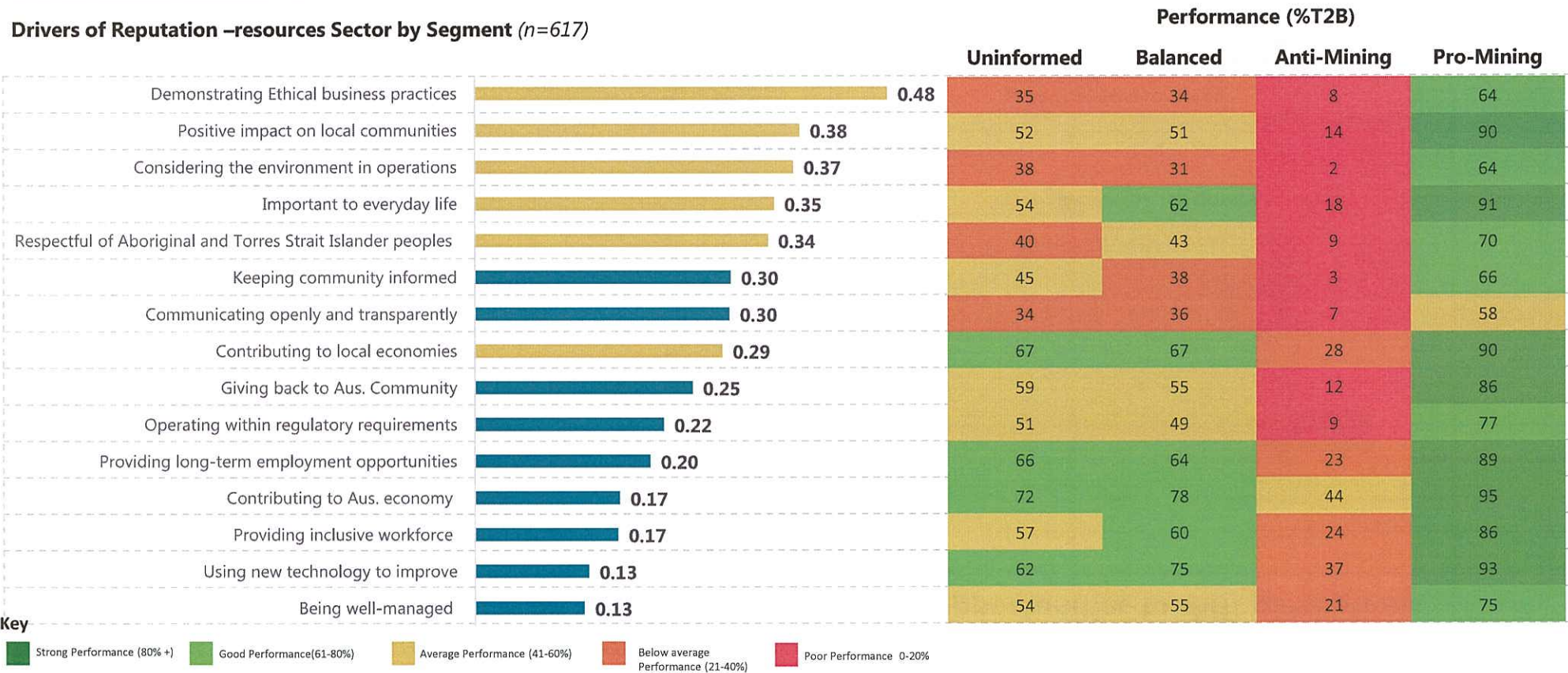
**Drivers of Reputation by Performance of Attributes (n=617)**



Q7 | How would you rate each of the following industries on each of the following attributes? Base (n=617) Performance (T2B%)



## Regardless of the segment, the resources sector consistently underperforms on the attributes that are most important to trust and reputation.

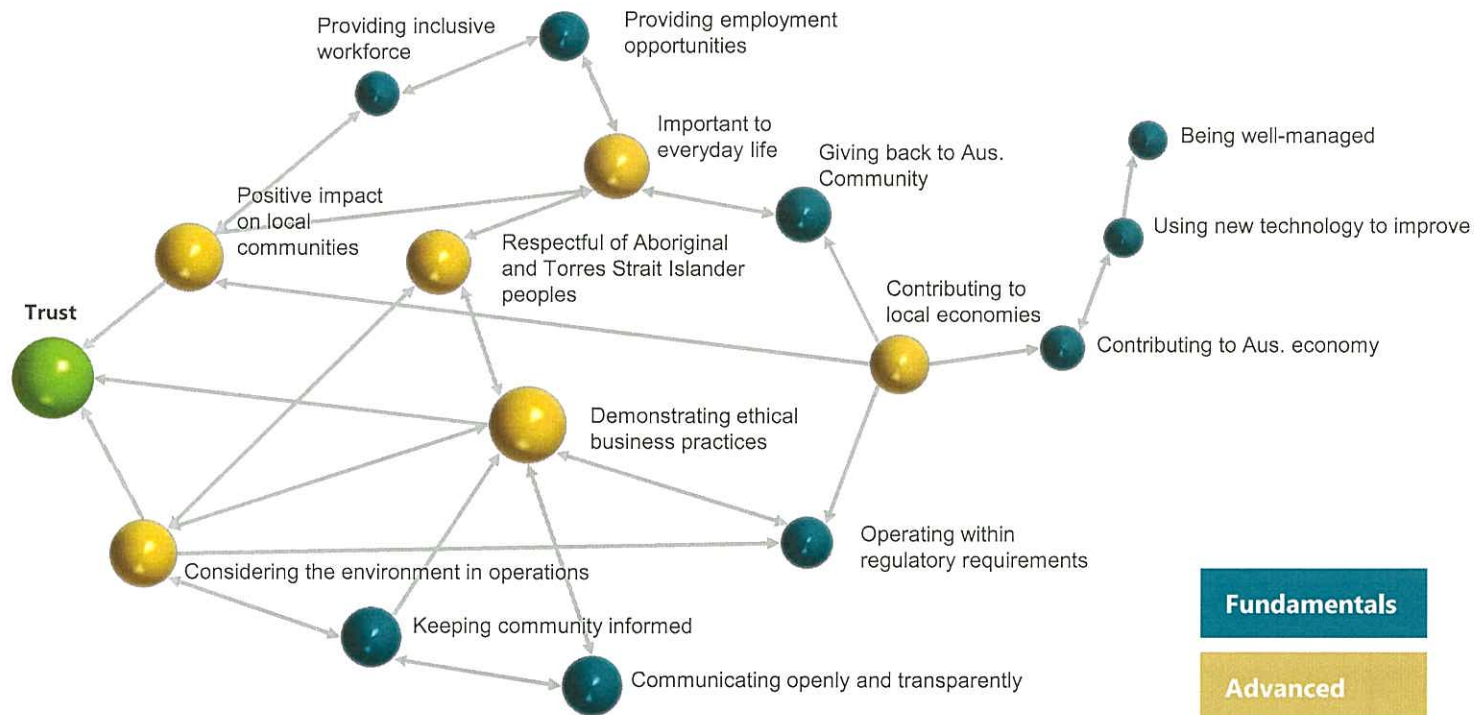


Q7 | How would you rate each of the following industries on each of the following attributes? Base (n=617) R<sup>2</sup> =0.63



# Fortunately for the sector, significant work is already being done in these spaces, it's now time to tell the story.

Communication Opportunities (Ipsos Bayes Net) (n=617)



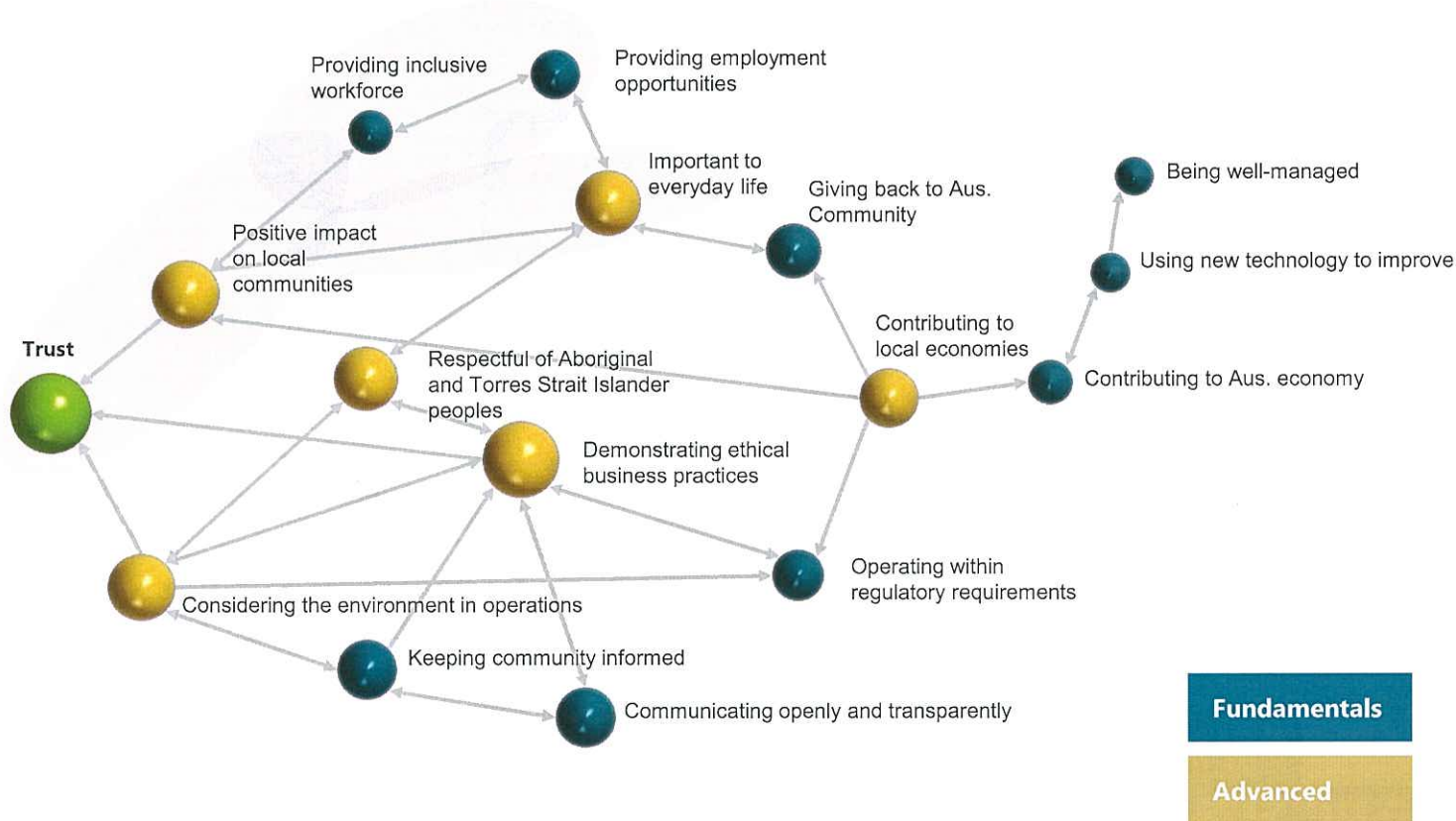
Q7 | How would you rate each of the following industries on each of the following attributes? Base (n=617)  $R^2 = 0.63$

- Drivers of trust in the sector are grouped into themed attributes. This reflects reality where humans do not think about concepts in isolation from one another but as groups of connected ideas.
- The **size** of the bubble indicates the importance of the metric in driving trust; the larger the bubble, the more important the metric in driving trust.
- Trust in the resources sector is mediated by three **Advanced** attributes; *Considering the environment in operations*; *Demonstrating ethical business practices*; *Positive impact on local communities*.



# Opportunity #1

Communication Opportunities (Ipsos Bayes Net) (n=617)



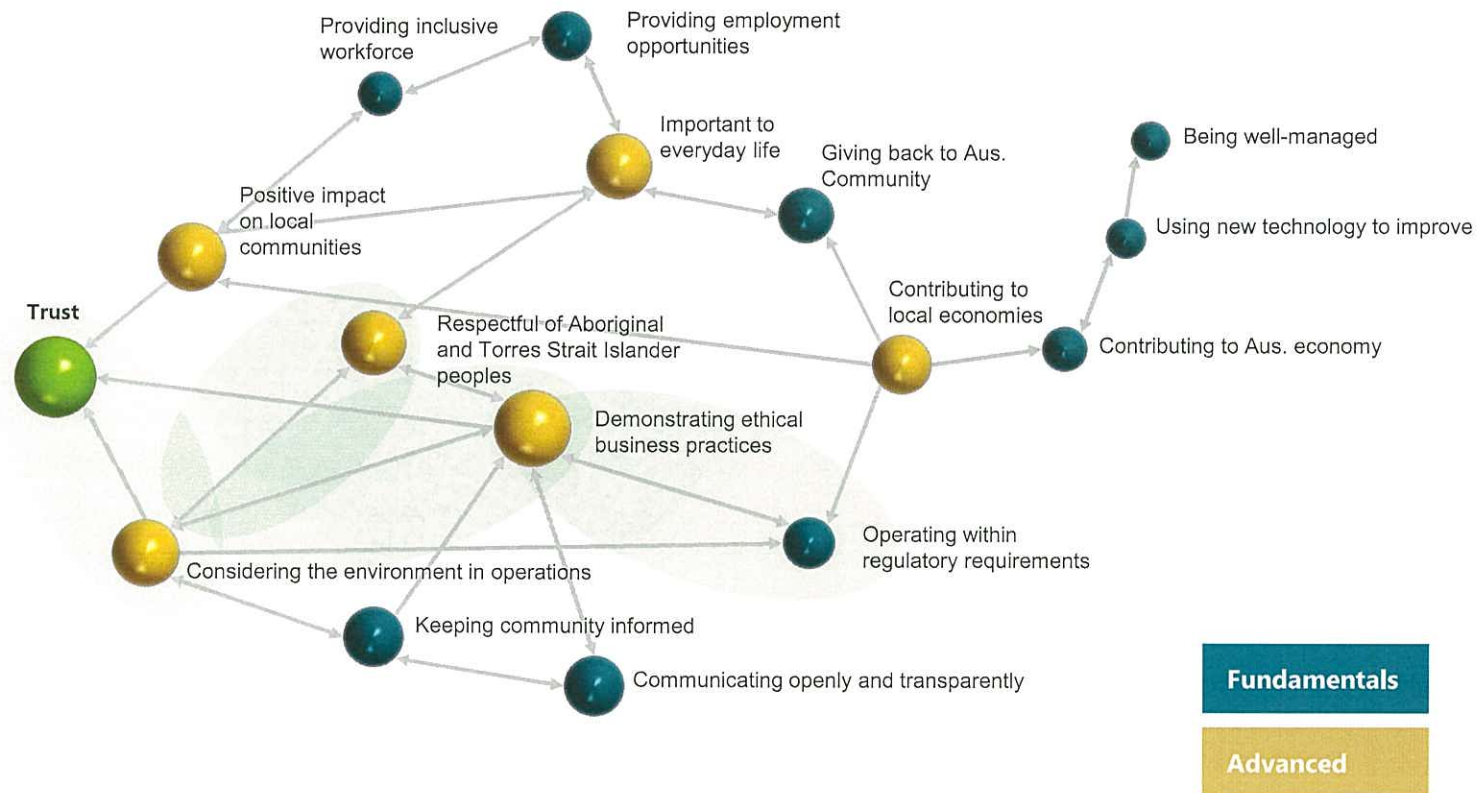
Q7 | How would you rate each of the following industries on each of the following attributes? Base (n=617)  $R^2 = 0.63$

- There is an opportunity to use **fundamentals**, well known facts about employment, to build authenticity in a new narrative.
- It is important to reframe traditional messaging around **inclusive workforces** and **employment opportunities** to highlight the **positive impact on communities**.
- Craft a narrative that highlights the **importance to everyday life** linked to a **positive impact on local communities**, meaning it is relevant to individuals and their values.
- Keeping in mind that **importance to everyday life** does not always have to reference everyday products.



# Opportunity #2

Communication Opportunities (Ipsos Bayes Net) (n=617)



Q7 | How would you rate each of the following industries on each of the following attributes? Base (n=617) R<sup>2</sup> =0.63

- Another, *more powerful*, opportunity exists in demonstrating consideration for the environment in operations. There are few **fundamentals** that can be leveraged in this space.
- Bi-directionally linked with two other **advanced** attributes **respectful of Aboriginal and Torres Strait Islander people** and **demonstrating ethical business practices**, there is significant opportunity in an unbiased, apolitical, human story in the environmental space.
- Close proximity and links to **keeping the community informed** and **communicating openly and transparently** highlight the need and caution for radical transparency and authenticity in this space.





08

# Communication and Messaging



# Message Testing - Optimisation

## Existing Sentiment:

I know it's important to the economy, but how does that affect me?

- Messages that contain key facts and figures performed better in terms of believability.
- These messages were easily rationalised; the specific facts were in some cases novel, the overall contribution to the economy was 'old news.'
- Messages as to the scale of the impact the sector has on the economy had more influence and for many was new information.

## Response to messages:

Jobs are really important but no-one I know works in the sector.

- Similar to those relating to the economy, messages with key facts and figures performed better in terms of believability but **can be quite dry; these messages are not novel.**
- The jobs messaging does resonate with some – particularly females with children given their life stage and priorities.
- Messaging lacks personal relevance and while appealing rationally, it is still interpreted as regionally focussed.

## Optimisation:

Use facts and figures when talking to big picture concepts such as the economy.

Continue to provide a human face for the industry that is relatable.



*If that is true I'm staggered that 80% of QLD's exports are minerals...I understand the power then...why some politicians might be so careful...it doesn't in any case make me think, 'In that case just leave it' because its unsustainable. – 34-45 years, Female, Teacher*



*I don't see anything in the news about how mining is helping famers?– 18-24 years, Female*

*By providing employment, they're helping QLD and that to me makes it more human. – 34-45 years, Female, Teacher*



# Message Testing - Optimisation

## Existing Sentiment:

It does create jobs but in the regions – not in Brisbane.

- After seeing the economy and jobs messaging, the TVC was seen to convey everything they'd just seen in the messages which is considered important information for the public to know
- The idea of Brisbane being a 'large mining town' made sense but aligned with the corporate end of the sector; it did not elicit 'warm and fuzzy' or have any further positive resonance considering Brisbanites.

## Response to messages:


Its important to keep the lights on, but apart from that it doesn't impact my life.


- Lots of 'ah-ha' moments but level of information is overwhelming.
- It was the small ways that mining/resources was linked to everyday life that had the most impact.
- For many it was a call to change personal behaviour rather than 'blame' corporates for bad/unsustainable behaviour

## Optimisation:

Continue to focus on diversity and telling a new rhetoric, distant from those at the literal coal face.

Narrow in one or two themes/facts and make the messages more succinct and specific to increase the impact.

 *The aspect of corporate stuff, I kind of knew would be in Brisbane but when I think of mining I don't think of Brisbane...Its not surprising but its more informative. – Female, 18-24 years*

*It's not just electricity. Its not something you really think about – where it comes from. It creates a pretty open mind. – Female, 34-45 years, children* 



# Message Testing - Optimisation

## Existing Sentiment:

The sector has no future, we need to move away from coal energy.

- There is a latent acceptance that the resources sector is challenged in terms of being sustainable, but little is actually known about this – no hard facts.
- Links with renewable energy were warmly received and linked with individuals' vision for the future – sustainability and better technology.

## Response to messages:

## Optimisation:

Leverage links with a better tomorrow and sustainability – be bold, be inspired.

“ Increase public awareness of it...reduce public backlash and get them to realise that it is vital so rather than stopping it, the focus should be on 'how can we make this more sustainable?' – Female, 18-24 years

The sector destroys the environment and doesn't clean up after itself.

- Images raise lots of questions, appetite for more detail and reiterates reluctance to just believe messaging from the sector.
- There is a tension between the image of mining magnates/traditional energy and sustainability /environmentally friendly behaviours that create a backdrop of scepticism.
- Since these messages don't immediately align with the perceptions of the industry, they are harder to rationalise; cut through may be difficult at first.

Lean into messaging in this space. Support from unbiased sources will be critical to their success.

“ I think there are passionate people in every industry, but unfortunately bureaucracy and money and decisions from the top means they aren't empowered to do what they set out to do. – Female, 34-45 years, Mother



**The two best performing messages are examples of the impact of leveraging the new communication opportunities. This indicates there is licence to communicate in this space and that QLD'ers want to hear more about these topics. Overall, the top performing messages utilise facts and specifics to build authenticity. They have obvious relevance to the population.**

**Message Testing Metrics (n=617)**

Novelty

Believability

Impact on Favourability

Interest

Comms Index

Minerals for renewables, batteries and high tech products represent a huge opportunity for Queensland.

Queensland miners are winning national awards for sustainability – for example New Hope, near Toowoomba won the Australian Business Sustainability Award for their progressive rehabilitation. The majority of the rehabilitated land has cattle grazing on it – right up against mining operations.

The Queensland resources industry uses just 0.1 per cent of Queensland's land mass while contributing \$62.9 billion dollars to the State's economy.

Resource companies are already working to lower emissions by improving energy efficiency and adopting renewable technologies. As major energy consumers this makes both business and environmental sense.

The energy mix is changing rapidly in Queensland. While energy from coal will decrease in share, government modelling shows we can only achieve 50% renewable generation by 2030 with ongoing baseload support from coal and gas.

Queensland produces two main types of coal: coal for steelmaking and coal for energy. 66% of Queensland's coal production is for steel, one of the most common, versatile and recyclable materials in the world. We need steel for buildings, bridges, trucks and cars.

Bauxite from Queensland's Cape York is used to produce the aluminium found in Nespresso capsules and iPhones.

Q21 | How novel do you find this statement? Q22 | How believable do you find this statement? Q23 | How does this statement make you feel towards the mining/resources industry? Q24 | Which of these topics are you most interested in hearing more about? Comms Index = %Novelty x % Believability x % Impact on Favourability x % Impact x 100 Base (n=617)

**The poorer performing areas speak to the old rhetoric of the industry. Either lacking in novelty or believability, there is less interest in these messages. These messages speak to the big picture and lack the specifics of the top performing messages to drive relevance.**

**Message Testing Metrics (n=617)**

Novelty

Believability

Impact on Favourability

Interest

Comms Index

Queensland has the world's leading lead, zinc, copper and silver district centred on Mount Isa, along with bauxite in Cape York and major coal and gas deposits through central and southern Queensland.

No other Australian State or Territory possess the wealth and diversity of resources found in Queensland.

Climate change is a critical global challenge, which must be addressed by all parts of society. The resources industry is committed to being part of the global solution.

Brisbane is Queensland's biggest mining town, supporting the jobs of 142,000 people in the greater Brisbane region.

Queensland has a long, proud history of mining. Since the first great gold mines at Gympie and Mount Morgan the industry shaped the economic and social development of the state and was instrumental in the settlement of our regions.

The products of the resources sector are everywhere in modern life: if it wasn't grown it was mined or drilled.

The resources industry is both high tech and high viz, employing engineers, scientists, geologists and environmental experts.

Q21 | How novel do you find this statement? Q22 | How believable do you find this statement? Q23 | How does this statement make you feel towards the mining/resources industry? Q24 | Which of these topics are you most interested in hearing more about? Comms Index = %Novelty x %Believability x %Impact on Favourability x %Interest x 100 Base (n=617)



**The performance of messages is relatively consistent across the segments (although with varying degrees of impact) indicating these top performing messages are unlikely to alienate the existing supporter base while still being likely to speak to those vehemently opposed to the sector.**

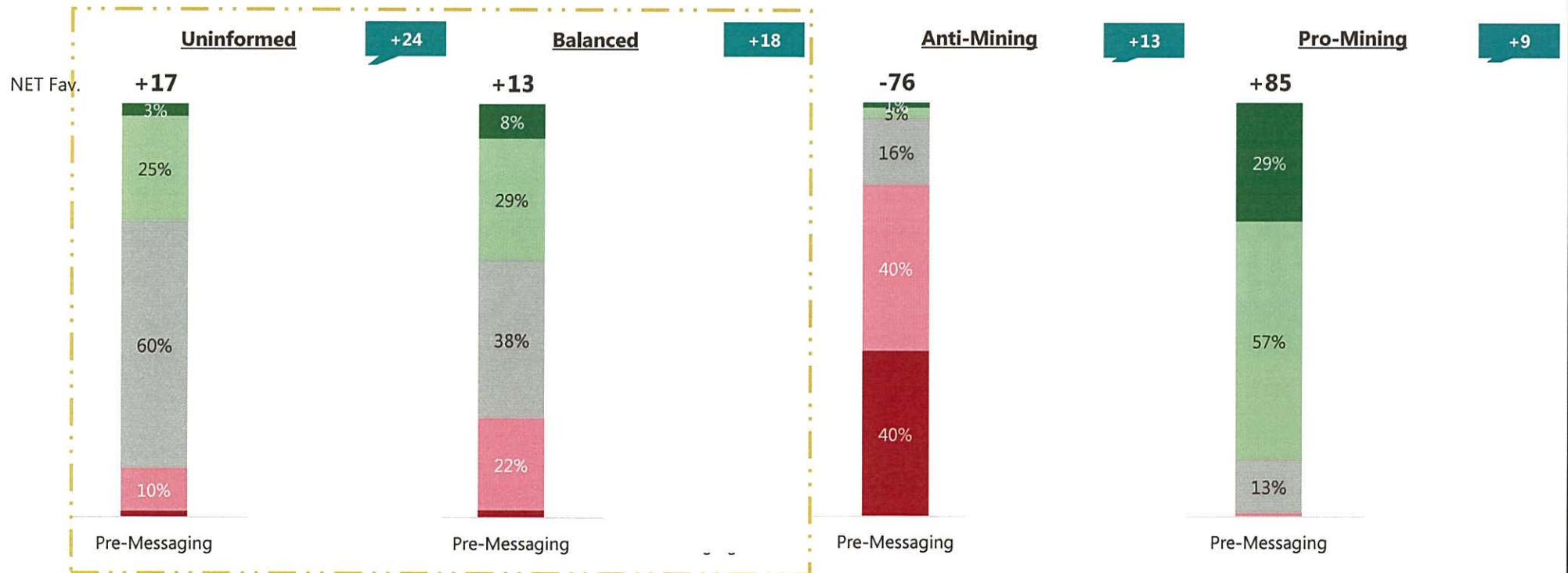
**Message Testing Metrics (n=617)**

	Total	Uninformed	Balanced	Anti-Mining	Pro-Mining
Minerals for renewables, batteries and high tech products represent a huge opportunity for Queensland	3.8	2.3	4.3	3.4	5.9
Queensland miners are winning national awards for sustainability – for example New Hope, near Toowoomba won the Australian Business Sustainability Award for their progressive rehabilitation. The majority of the rehabilitated land has cattle grazing on it – right up against mining operations	3.7	3.6	3.7	1.9	4.5
The Queensland resources industry uses just 0.1 per cent of Queensland’s land mass while contributing \$62.9 billion dollars to the State’s economy	2.0	1.1	2.6	0.4	5.5
Resource companies are already working to lower emissions by improving energy efficiency and adopting renewable technologies. As major energy consumers this makes both business and environmental sense.	1.7	1.5	2.2	0.8	1.3
The energy mix is changing rapidly in Queensland. While energy from coal will decrease in share, government modelling shows we can only achieve 50% renewable generation by 2030 with ongoing baseload support from coal and gas	1.3	1.1	1.7	0.2	1.2
Queensland produces two main types of coal: coal for steelmaking and coal for energy. 66% of Queensland’s coal production is for steel, one of the most common, versatile and recyclable materials in the world. We need steel for buildings, bridges, trucks and cars	1.2	0.9	0.8	0.3	4.1
Bauxite from Queensland’s Cape York is used to produce the aluminium found in Nespresso capsules and iPhones	1.2	1.1	1.8	0.2	1.5

Q21 | How novel do you find this statement? Q22 | How believable do you find this statement? Q23 | How does this statement make you feel towards the mining/resources industry? Q24 | Which of these topics are you most interested in hearing more about? Comms Index = %Novelty x %Believability x %Impact on Favourability x %Impact x 100 Base (n=617)

For all segments, the messaging has a positive overall impact. The biggest opportunity is in the Uninformed and Balanced segments with a new rhetoric and improved understanding of the industry. A positive impact is even achieved on the Anti-Mining segment with shifts from very unfavourable to somewhat unfavourable and neutral.

Message Impact on Favourability by Segment (n=617)



Q25 | And now taking into account, all that you know, how favourable is your overall opinion or impression of the mining/resources industry? NET Fav = %T2B Favourability - %B2B Favourability Base (n=617)





09

# Key Findings and the Way Forward

## Key Finding #1

### The resources sector is nearing crisis in Queensland; the community is polarised

- QRC's **concerns** about the reputation of the sector are warranted with evidence that social norms have shifted making it **less acceptable** to be **openly supportive** of the resources sector.
- This social landscape is likely impacting the **willingness of governments** to be seen to be openly **supporting** and **aligning** with the sector.
- The resources sector is viewed **less favourably** than both **tourism** and **agriculture**, and is seen to put these sectors with high levels of established goodwill **at risk**, further damaging its reputation.
- The resources sector's reputation is not as weak as the two sectors facing royal commissions, **banking** and **aged care** but current levels of negative reputation, and views around a lack of **regulation**, should act as a **warning to the sector**.



## Key Finding #2

### The resources sector isn't recognised for making QLD better

- The sector is defined by **cold** and detached associations, while others like agriculture and education have warm, positive and relevant associations.
- Individuals like **Gina Rinehart** and **Clive Palmer** are the prominent individuals associated with the sector and they are not viewed positively; their values, and therefore the values of the sector, are seen to be **out of step** with those of the QLD community.
- The sector is not trusted to do the right thing by QLD; when making **decisions** it is seen to **favour short-term economic benefit to its shareholders** over what's best for the community and the needs of the future.
- **Shareholders** are seen as a **barrier to sustainability** with little understanding among the public of the importance of sustainability agendas in the boardroom.
- The **benefits** from the sector are seen to flow to the already **very wealthy** rather than to everyday QLD'ers.
- In short, the **value proposition** is **not convincing**.

## Key Finding #3

### Thee narrative must evolve or the sector risks further reputational decline

- The **traditional narrative** of the resources sector, that it is critical to Australia's economy and job market, is still **top of mind** and generally accepted by the public.
- What has **changed** is that the **narrative of those opposed** to the resources sector has been very successfully communicated and has **fundamentally changed** the value proposition of the sector.
  - At the heart of this narrative is that the **sector has a devastating environmental impact**, and that this is **unavoidable** whereby the mere existence of the resources sector is bad for the environment.
  - This has extended into as assumption among the public that the **resources sector favours traditional over renewable energy** and is a **barrier** in the way of Australia embracing more sustainable energy production.
  - The impact of this narrative over time is that the **traditionally accepted strengths** of the resources sector are **no longer enough to trade off** growing concerns about environmental impact.
  - Further, the sector has not successfully managed to **refresh** its value proposition to **either strengthen and diversify** the **benefits** the sector brings **or counter** the now accepted truth that the resources sector is devastating to the environment.



## Key Finding #4

### The environmental issue cannot be avoided; the sector has to address it directly

- Those opposed to the resources sector have been so successful in establishing the environmental narrative, the sector must **address it directly, authentically and powerfully.**
- The sector is closely **associated** with the **traditional energy** sector, further embroiling it in the highly politicised environmental debate. **And this debate matters to the public.**
- The sector's reputation is driven by perceptions of **ethical behaviour** and how it impacts the **environment** – if it gets its positioning right on these issues, it will see **reputational gain.**

## Next Steps #1

### A unified message from the sector that changes its value proposition

- **How:**
  - Traditional channels of communication should not be discounted, all segments absorb information from **mainstream TV**.
  - However, trust and independence will be the challenge; there are very **few trustworthy and independent voices** on the pro-mining side of the debate.
  - Third party endorsement will be critical and pointing to independent awards/accreditation can also be effective.
- **What:**
  - The new narrative must move beyond the current focus on economic contribution and job creation and should have a **dual focus**:
    1. Increase the **relevance** of the sector to QLD'ers by focusing on the contribution of the sector to everyday life in a more compelling way, without being overwhelming.
    2. Provide an **alternative environmental** narrative.



## Next Steps #2

### The relevance narrative

- Highlight role of sector in everyday life by **focusing on one or two key themes** rather than the whole gamut of how much in our lives is the product of mining; less will be more as the alternative is too **overwhelming**.
- Linking to **renewables** or incorporating a **sustainability** theme will be beneficial and help address perceptions of being a **finite** industry
- Demonstrate that **benefits** from the sector **flow to all QLD'ers** and not just the **elite** and very **wealthy**.
- Prove that supporting the sector **does not mean** supporting **values that are out of step** with the QLD community.
- Demonstrate that **jobs** extend **beyond FIFO** (that is out of step with community values) and high-flying (and unachievable) corporate **executives**.
  - Focus on opportunities to **regional communities** should continue (unique and emotive message) but be supported by the new message about opportunities in **urban areas**.
  - Potential to position as an **employer of choice** where individuals can make a difference in an environment that supports their values and aspirations (dependant upon the success of the environmental narrative).

## Next Steps #3

### The environment narrative

- Develop an **alternative environmental narrative** (to counter that of the successful anti-mining movement) that addresses perceptions that:
  - Sector is not genuinely committed to **land rehabilitation**
  - Land used for mining is left **unusable** even after being rehabilitated
  - All **coal** is **bad**
  - Sector supports and benefits from **investment** in **traditional energy over renewables**
  - Sector is a **barrier** to not an advocate for investment in renewables
  - **Profits** and **sustainability** are mutually **exclusive**
  - Sector is **unsustainable** and has a **finite** life
  - Sector is **aligned with**, even driving, the **government's** agenda on climate change, emissions and renewables



## Next Steps #4


### This is a medium-term strategy requiring aligned, sustained effort


- The **anti-mining** environmentally focussed **message** has been communicated extremely **effectively** over the last 10+ years to now sit as an **accepted truth** among QLD'ers.
- The **sector** is now **challenged** to weave its own, **counter narrative** into society.
- To be effective it must be **authentic** to the sector:
  - It must establish **why** the sector should have a voice on sustainability and acknowledge the **responsibility** it has to get the balance right (i.e. the environment is inherently linked to its core operations) and that it has been **doing work** in this area, **quietly**, for a very **long time**.
  - The sector has a wealth of **good news stories** to choose from to provide the evidence to support this new narrative, and these **proof points** will be critical in establishing a believable and authentic narrative.
  - The time now, is to talk about this work in the **right tone** in order to **stop** the **reputational decline** of the sector.

## For more information

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