GEI

PROGRAM

Public Perceptions Survey on
Extractive Industries

World Bank
Institute

Public Perceptions Survey on Extractive Industries

In January 2014, the World Bank Institute commissioned RIWI corporation to conduct an online survey of public perceptions of mining and, where applicable, of oil/gas in fourteen resource rich countries.

What is different about this survey?

For the first time in relation to the extractive industries, an innovative nanosurvey approach was used. This has the advantage of efficiently reaching a large number of truly randomized respondents – over 16,000 complete responses were collected in one month and as many as 60,000 responses to individual questions. The responses are limited to those with internet access, typically a more urban public (for a country with low web penetration, most respondents may be concentrated in the capital city). As such, the findings cannot be taken as representative of communities surrounding mining or oil/gas development – populations for which other survey methodologies are far more appropriate. This limitation was recognized in design. The questions were designed to be accessible to a general public, exploring perceptions of the sector's contributions, sources of information on the sector, as well as demand and trust in available information.
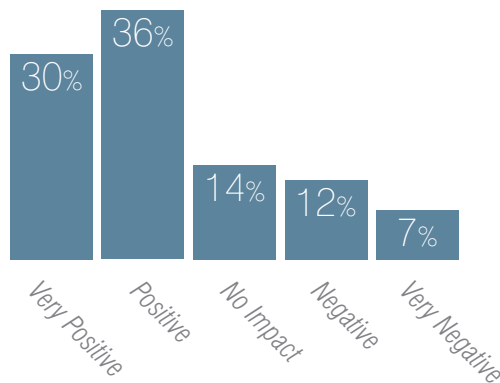
The methodology collects responses in real-time and makes them available in open data format, allowing all to freely download, use and analyze the data, and combine with other sources. For each survey response, age, gender and location information is available. Datasets enable comparisons across countries and between responses for mining and for oil/gas.

This pilot survey, testing the potential of the technology, suggests possible entry points for engagement with citizens to build greater understanding of the sector, the stakes at play, and its true impacts. We welcome further analysis of the collected data to better understand what it can tell us (and what it cannot). We also look forward to exploring with other organizations, the most effective combination of methodologies to comprehensively gauge citizens' perceptions of extractive industries.
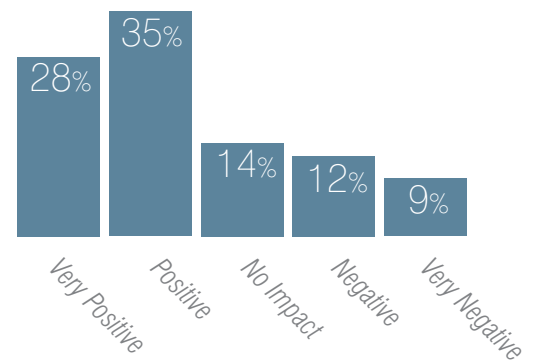
What are the responses of those surveyed?

Extractive industries are perceived positively. A clear majority of respondents believe that mining and oil/gas are positively impacting their country's development. Across the board, extractive industries are also seen as the sector people perceive as contributing most to their country's development (followed by farming). This positive view holds true across age groups and genders. It is also true for both new producers and for countries with a legacy of production.

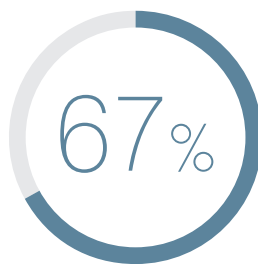**IMPACT OF THE MINING INDUSTRY ON YOUR COUNTRY?**

Very Positive	Positive	No Impact	Negative	Very Negative
30%	36%	14%	12%	7%

IMPACT OF THE OIL & GAS INDUSTRY ON YOUR COUNTRY?

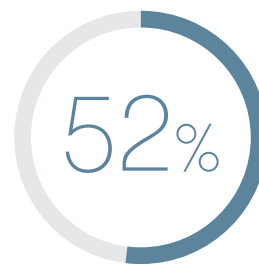| Very Positive	Positive	No Impact	Negative	Very Negative
28%	35%	14%	12%	9%

People struggle more to see how extractive industries impact their individual lives. Perceived positive impacts of mining (and oil/gas) are strongest at national level, and lower for impacts on respondents' communities and then individual lives. This suggests a need to further show how extractives resources translate into tangible benefits.
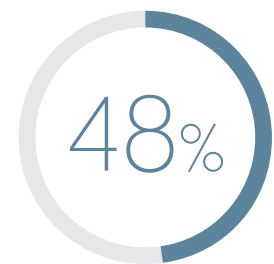
Levels of Impact
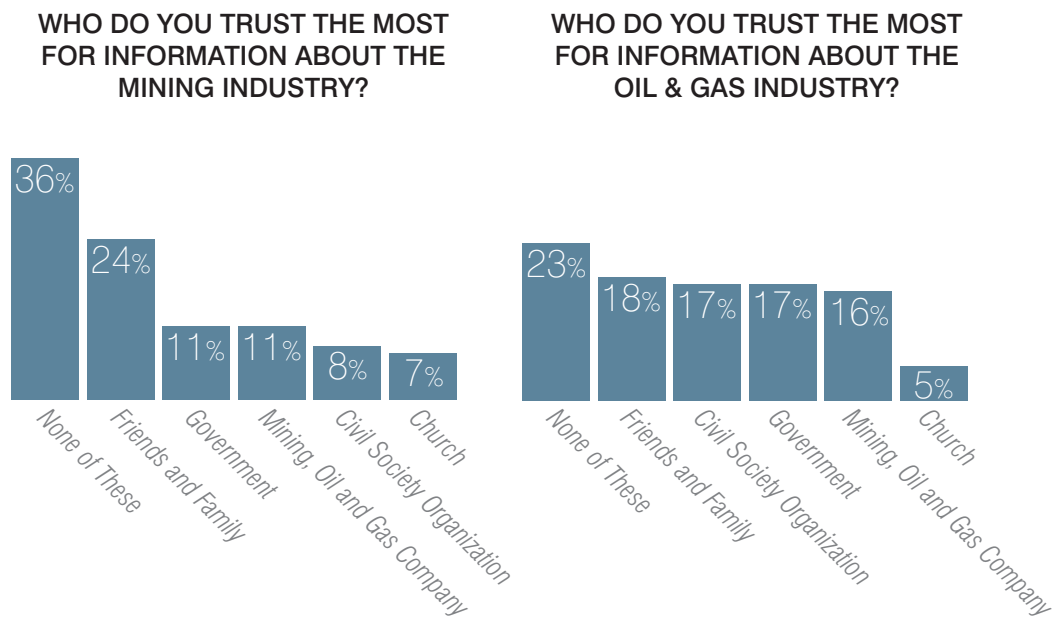
67% positively impact their country

52% positively impact their community

48% positively impact their own life

A diversified approach to messaging is needed. Based on the responses, no one source of information can be relied upon to reach a majority of audiences. The Internet is now the most common source of information on the sector from among those surveyed, but newspapers and television, and to a more limited extent radio, remain significant sources.

Trust in information on extractives is mixed and limited. In terms of who is trusted most for information on extractive industries, there is greater variation among countries. The results suggest a possible trust deficit – in the case of both mining and oil/gas, the highest ranked response to whom do you trust for information on the sector was "None of the above."

WHO DO YOU TRUST THE MOST FOR INFORMATION ABOUT THE MINING INDUSTRY?

Category	%
None of These	36%
Friends and Family	24%
Government	11%
Mining, Oil and Gas Company	11%
Civil Society Organization	8%
Church	7%

WHO DO YOU TRUST THE MOST FOR INFORMATION ABOUT THE OIL & GAS INDUSTRY?

Category	%
None of These	23%
Friends and Family	18%
Civil Society Organization	17%
Government	17%
Mining, Oil and Gas Company	16%
Church	5%

People want more information on both mining and on oil/gas, but awareness of existing information appears limited. A majority of respondents would like more information on the sector. However, when asked if governments publish information on taxes and payments made by extractives companies, most say they do not, even if that information is public, as for the four countries in the sample who are compliant members of the Extractive Industries Transparency Initiative.

Entry points for further research

The results reveal differences in perception potentially worth exploring further through other approaches. Country context matters. Take the example, of most trusted sources of information. In Indonesia, mining companies are the most trusted source (26% of respondents), compared to just 11% for civil society. Yet, in Tanzania it is almost the inverse – civil society is most trusted by 31% and mining companies by just 11%. What is driving those perceptions? Why is Colombia an exception in having mining impacts less positively viewed than oil/gas?

Worth repeating. This pilot survey suggests that nanosurvey technology has potential to provide useful data on public attitudes towards the sector, but as a complement to more traditional survey approaches, which can go much more in depth and target most relevant populations.

Contact

Explore the full survey results and download the data at www.surveyextractives.com

For more information regarding the survey please email: *info@surveyextractives.com*

You can also join the discussion on the results at the GOXI community of practice: *www.GOXI.org*

For more information on the Governance of Extractive Industries program at the World Bank Institute, please contact Michael Jarvis, Team Leader, at *mjarvis@worldbank.org*

About the World Bank Institute – Governance for Extractive Industries Program (GEI)

The Program promotes transparency and accountability along the extractive industries value chain. GEI believes countries can have a brighter future through accountable and transparent use of extractive resources. Innovative and collaborative approaches are essential to achieve lasting solutions. This is why GEI connects and empowers key stakeholders in extractive industries to jointly identify, prioritize, and implement actions designed to lead to better governance outcomes. The program seeks to build capacity, knowledge and networks through a collaborative model.

For more information about RIWI's methodology visit: *http://riwi.com/wp-content/uploads/2014/02/GRITCPR2013_SeemanIng.pdf.*