

# COAL SEAM GAS (CSG) IN THE NEWS: THE ISSUES AND THE STAKEHOLDERS 1996-2013



## DISCLOSURE

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This report has not yet been independently peer reviewed.

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“The coal seam gas sector has attracted such passion that it is often difficult to establish the truth.

The industry promises 18,000 jobs and at least \$45 billion of investment in regional Australia, but ugly television images of tap water that can be lit and warnings of ecological catastrophe have whipped up an unusual alliance of greens and Nationals bent on slowing or even killing it.”

Geoff Winestock  
The Australian, 20 August 2011



# EXECUTIVE SUMMARY

## Introduction

Coverage of Coal Seam Gas (CSG) in Australia first emerged as a business story in national and state news reports. CSG was hailed as the saviour of stagnant regional economies and journalists told a compelling story of multi-million dollar deals, infrastructure developments, jobs growth and an export windfall for Australia. Industry voices dominated news reports and the story was one of shared prosperity.

Today, news coverage of CSG tells a controversial story of conflict over land rights, environmental risk and threats to human health. Conflict at all levels of government, and between industry and the community, is central to this narrative.

Using computer aided content analysis and a 'big data' set of more than 14,148 Australian news articles published between 1996-2013, this study provides a longitudinal analysis of CSG news coverage in Australia. It also explores the role of CSG within the broader story of 'gas' in the news over the 17 year period and the shifting conversation surrounding this natural resource over time.

## Study aims

This study investigates:

- the intensity (volume) of news attention
- the shifts in issues and topics that have emerged over time
- the emergence of prominent stakeholders and stakeholders.

This study also explores the interplay between the news media, industry, political agents, activists, and communities and escalating controversy.

The comparative analysis of an additional 17,459 news articles relating to 'Unconventional Gas' from United States news sources provides further insights into the critical role played by prominent stakeholders.

## Summary of key insights

### Intensity of media coverage

News coverage of CSG in Australia—and its prominence as a public issue—began intensifying in early 2008 and peaked in late 2011. A similar, although less dramatic, increase in media attention occurred in the US.

### Issues and topics

As news media attention has intensified, it has also shifted focus.

In 2008, stories of business deals and infrastructure projects dominated Australian and US news coverage. Over time the balance

has 'tipped' and stories of environmental risk, land access disputes, and protest now absorb the space once held by business deals and infrastructure projects.

The 'business vs environment' shift in Australia has been more pronounced than in the US.

In Australian news coverage, the narrative surrounding water security has captured significant attention. In contrast, news coverage in the US has been anchored by the consistent dominance of topics relating to the need to free US domestic energy supply from its reliance on foreign countries.

### Stakeholders and stakeholders

The rise and fall in prominence of stakeholders and stakeholders in news coverage is a critical piece of the evolution of CSG discourse.

In Australia and the US issue advocates emerge in mid-2008 and there is an interplay between their increasing share of voice, intensifying media attention, and growing reports of risk to the environment and landholder rights.

The heightened politicisation of CSG in Australia, and the engagement of disparate political voices in the debate, has created a turbulent issues environment.

In the US, where state governments have maintained dominant share of voice and, as a majority, provided consistent bipartisan support for unconventional gas, peaks in the intensity

of media attention and shifts in the coverage of issues and topics has been more moderate.

In Australia, industry stakeholders have consistently lost share of voice not only to issue advocates, but to government stakeholders.

Issue advocacy, rising community concern and increased news media coverage has successfully placed CSG on the political agenda in Australia. The ensuing, political attention, loss of bipartisan support and conflict has intensified news coverage and further amplified community concern and the prominence of issue advocates.

### Definition of terms:

- Stakeholders: Any group or individual who can affect (or is affected by) the achievement of the organisation's objectives
- Stakeholders: Any group or individual who asserts their interests and concerns, seeking acknowledgement and action from an organisation
- Issue Advocates: Any group or individual who aims to influence public and/or organisational policy through strategic action (i.e. Lock the Gate, NSW Farmer's Association)



# THE FRAMEWORK

**The news media reflect, amplify and influence knowledge and attitudes, particularly around topics that are largely unfamiliar. News coverage is a powerful lens through which emerging and escalating issues, and the influence of stakeholders and stakeseekers, can be tracked, interpreted and analysed.**

## The media, issues and public opinion

The rationale for using news reports to explore an escalating and contentious public issue is two-fold. First, news media operate as a lens through which individuals understand the social and political world, providing the raw material for individuals to understand the opinion climate around them, ultimately influencing what they know and how they know it<sup>1</sup>. Second, the contributions of industry proponents, opponents, arbiters, opinion leaders and the undecided are captured in such media coverage.

When it comes to topics such as science and energy, decades of research show that the media are the public's primary sources of information. For emerging issues, such as CSG, the media can be 'particularly influential'<sup>2</sup>.

## The media, stakeholders and elite cues

Cues from elite leaders in politics and business, in combination with media coverage, are the most prominent drivers of public attention, concern and opinion on controversial issues. "When elites have consensus, the public follows suit...When elites disagree, polarization occurs..."<sup>3</sup>.

For example, US research shows that high levels of public concern over climate change were seen only during periods of active engagement by political elites and intense media coverage<sup>4</sup>.

Research also shows that elites provide cues through disengaging from contentious debate. As elites attempt to avoid sustaining an issue by refusing to engage in a public debate, issue advocates often advance<sup>5</sup>.

## Using the media to map issues and stakeholders

This study:

- explores and maps changes in the intensity and issue content of CSG news media coverage in Australia over time
- identifies prominent stakeholders and stakeseekers in the Australian CSG debate and maps the change in their share of voice over time
- compares the Australian and the US experience to explore similarities and differences in news media coverage over time and to investigate the role of elite cues as drivers of public attention, concern, and opinion.

- 
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# THE METHOD

The computer aided analysis of a data set comprising more than 31,000 news articles provides a unique longitudinal map of the CSG industry's development.

<p><b>Stage 1: Data collection and cleansing</b></p>	<p>Using the Factiva news database 14,148 Australian and 17,459 US news reports from 36 sources were systematically extracted. Search terms were selected by saturation point (or the point where adding new search terms provided no additional results). Data were extracted and saved chronologically year by year in quarterly (three month) clusters.</p> <p><b>Australia:</b> Using 'coal seam gas' or 'natural gas' as the key search term, news reports published between January 1996-December 2013 were extracted. News sources were selected to capture a) all major national and metropolitan news sources on the East Coast and b) relevant regional and rural media in the states of NSW and Queensland where the CSG industry is most active in terms of exploration and production.</p> <p><b>United States:</b> Using 'unconventional gas', 'natural gas', 'shale gas' or 'fracking' as the key search terms, news reports published between January 2008-December 2013 were extracted. News sources were selected to capture a) all major news organisations with national reach b) relevant state and county publications in Pennsylvania and Texas, the two states with the highest number of operational unconventional gas wells.</p>
<p><b>Stage 2: News media coverage mapping and analysis</b></p>	<p><b>Identifying thematic content:</b> The text analytic software Leximancer™<sup>6</sup> was used to identify and visually map the thematic content of each of the data sets (Australia and US). Leximancer calculates word occurrence and co-occurrence within texts (co-occurrence was limited to within two sentences), to statistically calculate themes (issues) and the individual concepts (topics) they comprise.</p> <p><b>Mapping change over time:</b> The change in thematic content was mapped over time by pairing Leximancer with Discursis<sup>7</sup>. Discursis produces diagrammatic visualisation of text that has an inherent temporal structure, examples include conversation transcripts, social media feeds, and collections of academic journal abstracts or news stories<sup>8,9</sup>. Discursis automatically builds an internal language model from input text (the Australian and US data sets) and, using the Leximancer coding, tags each news article based on the conceptual content. The Australian and US results were then aggregated on a quarterly basis to visually map change over time.</p>
<p><b>Stage 3: Stakeholder mapping and analysis</b></p>	<p>A combination of computer-based scripting techniques and the entity extraction methods contained in the Stanford Natural Language Processing Library were used to identify name (or name-like entities) and count the number of news articles in which the individual is mentioned.</p> <p>The number of news articles in which the individual is mentioned (rather than all mentions) was used as the unit of measurement to ensure an accurate representation of prominence.</p>

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# GAS IN THE NEWS 1996-2013

**Intensity of media coverage and the reporting of issues and topics in Australia remained stable from 1996-2007. Early signs of the dramatic changes to come did not emerge until January-March 2008.**

## INTENSITY, ISSUES AND TOPICS

Four central issues comprising 70 topics in news coverage of CSG from 1996-2013 emerged. These issues, and the key topics they comprise, are detailed in Table 1. A list of news sources and article count is detailed in Table 2. A complete list of all news sources is included as Appendix A.

Figure 1 shows the changing prominence of these issues over time against changes in the intensity of news coverage.

This report provides a summary analysis of the full 1996-2013 period and focuses on the period of most significant change from 2008-2013.

**Table 1: Issues and topics 1996-2013**

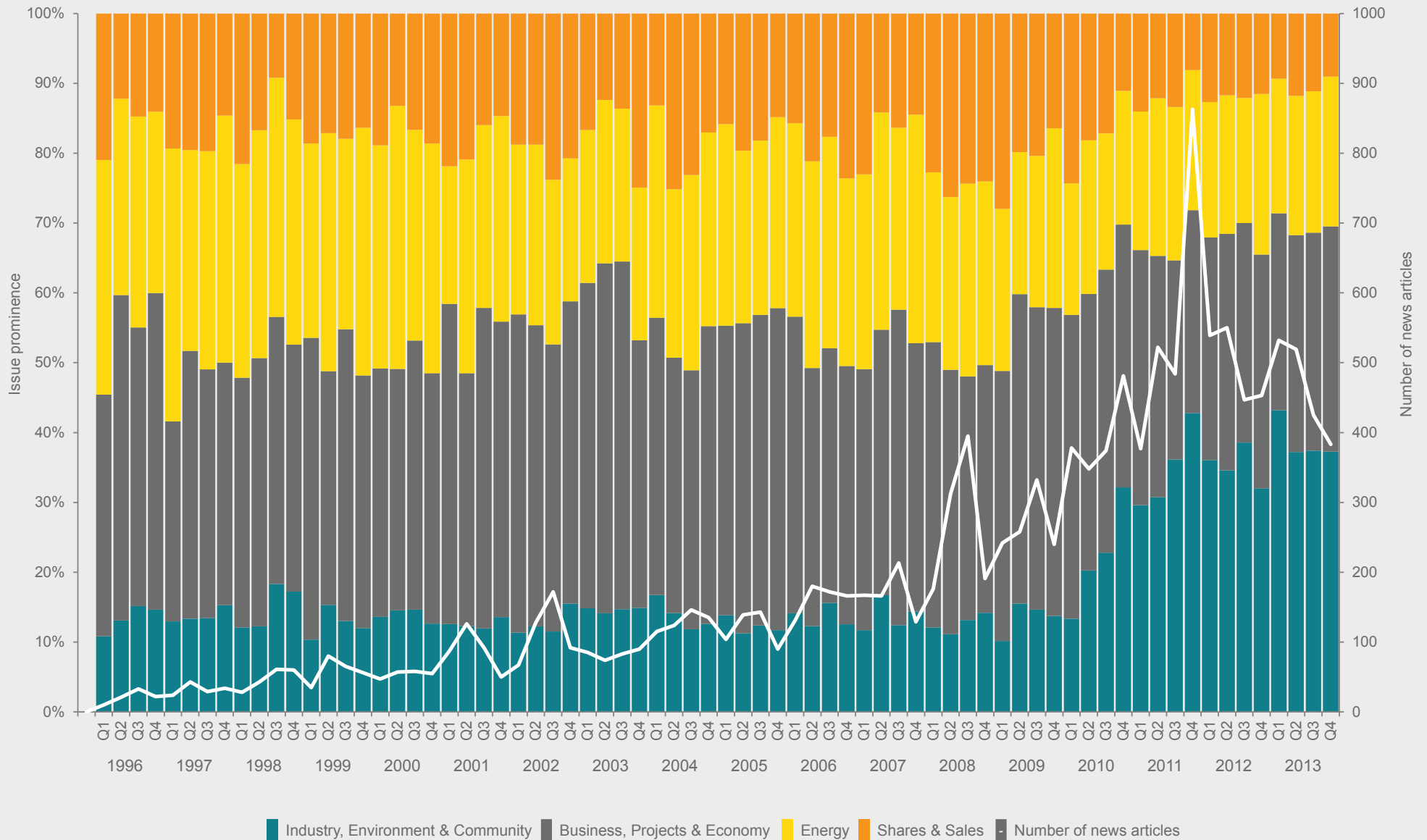
<b>BUSINESS, PROJECTS &amp; ECONOMY</b>	The role of CSG in Australia's economy and employment outlook. The business partnerships, private investments, and construction projects required to process and deliver unconventional gas to the global market also feature.	Key topics: project, LNG, billion, production, Queensland, oil, development, venture, supply, plant, reserves, pipeline, construction
<b>INDUSTRY, ENVIRONMENT &amp; COMMUNITY</b>	Industry response to environmental regulation. Community concern (particularly in NSW) over contamination of drinking and agricultural water supplies, environmental, and health risks. Activists, farmers, and protest feature in this theme. Conflict over land access also emerges.	Key topics: industry, government, drinking, CSG, exploration, wells, NSW, environmental, grazing, drilling, people, farmers, community, policy, spokesman, meeting, property
<b>ENERGY</b>	The role of CSG in Australia's energy supply and carbon reductions. The mining and carbon taxes also feature.	Key topics: energy, power, market, carbon, emissions, electricity, fuel, tax
<b>SHARES &amp; SALES</b>	Share prices, and company profits/co-investments.	Key topics: cents, offer, interest, analyst

**Table 2: CSG news reports by source 1996-2013**

Source	n	%
National Publications	9,868	69.7
State Publications (Qld, NSW, ACT, VIC)	2,475	17.5
Regional/Rural Publications (Qld, NSW)	1,805	12.8
<b>Total</b>	<b>14,148</b>	<b>100</b>



Figure 1: Intensity of news coverage and issue prominence 1996-2013



# GAS IN THE NEWS 2008-2013

## ISSUES AND TOPICS

Content analysis of the 9,821 news articles published between 2008-2013 revealed six central issues comprising 81 topics. These issues and the key topics are detailed in Table 3. A list of news sources and article count is detailed in Table 4. A complete list of all news sources is included as Appendix A.

Figure 2 shows the relationship between issues and topics within news coverage.

*“For some, coal-seam gas can be the lifeblood of this state’s economy. Others say it is poison.”*

John McCarthy  
The Courier Mail, 11 June 2011

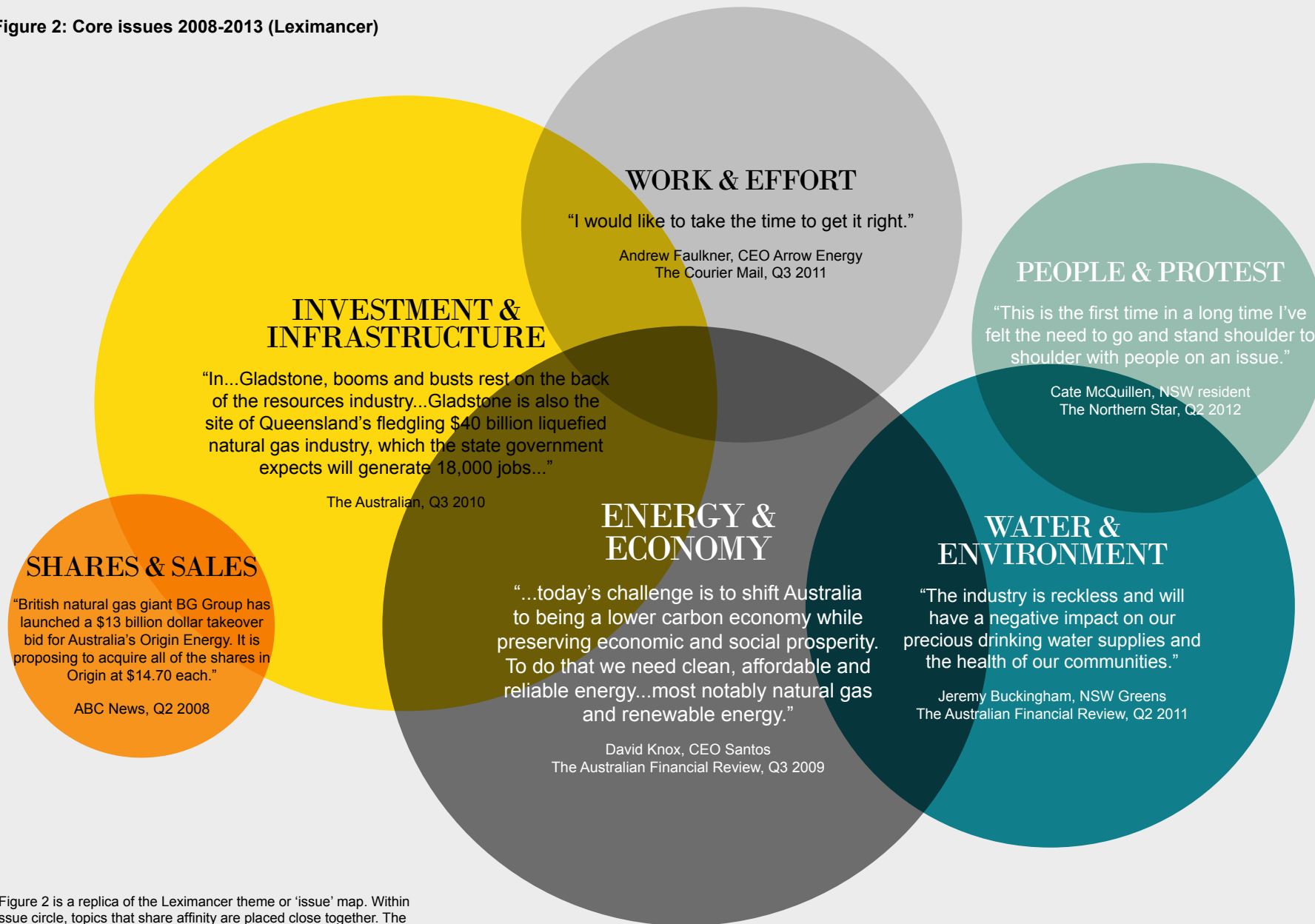
**Table 3: Issues and topics 2008-2013**

<b>ENERGY &amp; ECONOMY</b>	The role of CSG in Australia’s (particularly Queensland’s) economic boom, employment growth, energy supply, and carbon reductions. The story is one of export dollars and prosperity, particularly in regional areas. The mining and carbon taxes (industry protection and public revenue) also feature.	Key topics: liquefied, projects, Queensland, government, energy, development, supply, power, emissions, demand, carbon, tax, pipeline, fuel
<b>INVESTMENT &amp; INFRASTRUCTURE</b>	The business partnerships, private investments, and construction projects required to process and deliver CSG to the global market. Job creation also features.	Key topics: project, LNG, billion, production, oil, venture, investment, plant, deal, market, Gladstone, reserves, cost, construction
<b>WATER &amp; ENVIRONMENT</b>	Community concern (particularly in NSW) over contamination of drinking and agricultural water supplies, environmental, and health risks. Issue advocates, farmers, and protest feature strongly. Conflict over land access also emerges.	Key topics: CSG, drinking, mining, exploration, NSW, environmental, land, wells, drilling, impact, federal, local, community, farmers
<b>WORK &amp; EFFORT</b>	Human endeavour, time, and effort to work through issues, implement projects, and make money. Physical labour and people as a workforce also emerges.	Key topics: time, work, business, group, site, workers
<b>PEOPLE &amp; PROTEST</b>	Unification of people around an issue and their actions, particularly community meetings and protests and conflict between groups (i.e. industry and issue advocates).	Key topics: people, issue, meeting, spokesman, public, property
<b>SHARES &amp; SALES</b>	Share prices, and company profits/co-investments.	Topics: shares, interest, analyst

**Table 4: CSG news reports by source 2008-2013**

Source	n	%
National Publications	6,604	67.2
State Publications (Qld, NSW, ACT, VIC)	1,629	16.6
Regional/Rural Publications (Qld, NSW)	1,588	16.2
<b>Total</b>	<b>9,821</b>	<b>100</b>

Figure 2: Core issues 2008-2013 (Leximancer)



Note: Figure 2 is a replica of the Leximancer theme or ‘issue’ map. Within each issue circle, topics that share affinity are placed close together. The size of each issue circle represents the spacing between the individual topics it contains. It does not indicate prominence.

## INTENSITY AND CHANGE OVER TIME

### Intensity

News media coverage begins to gradually increase in intensity from January-March (Q1) 2008 and peaks in October-December (Q4) 2011.

Q4 2011 represents more than 8 percent (n=863) of total coverage and a 78.3 percent increase on the previous quarter.

### Issues and topics

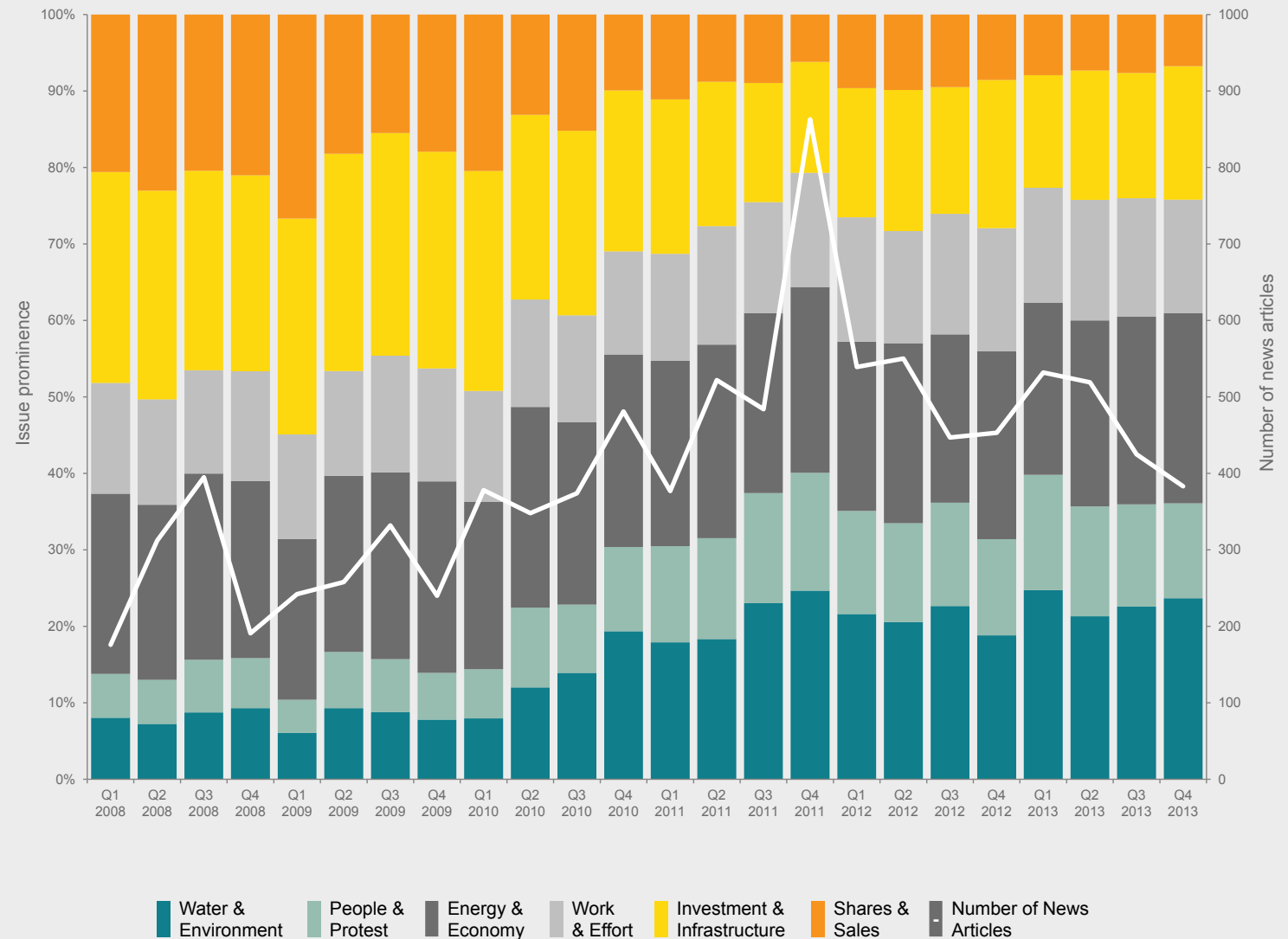
News coverage shows significant content change over time and shifts from a story of infrastructure, investment and business to one of community concern over threats to water supplies, land rights, environmental risk and protest.

Topics that show the greatest change over time are:

- 'Water & Environment' and 'People & Protest' (increasing prominence)
- 'Investment & Infrastructure' and 'Shares and Sales' (decreasing prominence).

'Energy & Economy' and 'Work & Effort' show some consistency in prominence over time.

Figure 3: Intensity of news coverage and issue prominence 2008-2013



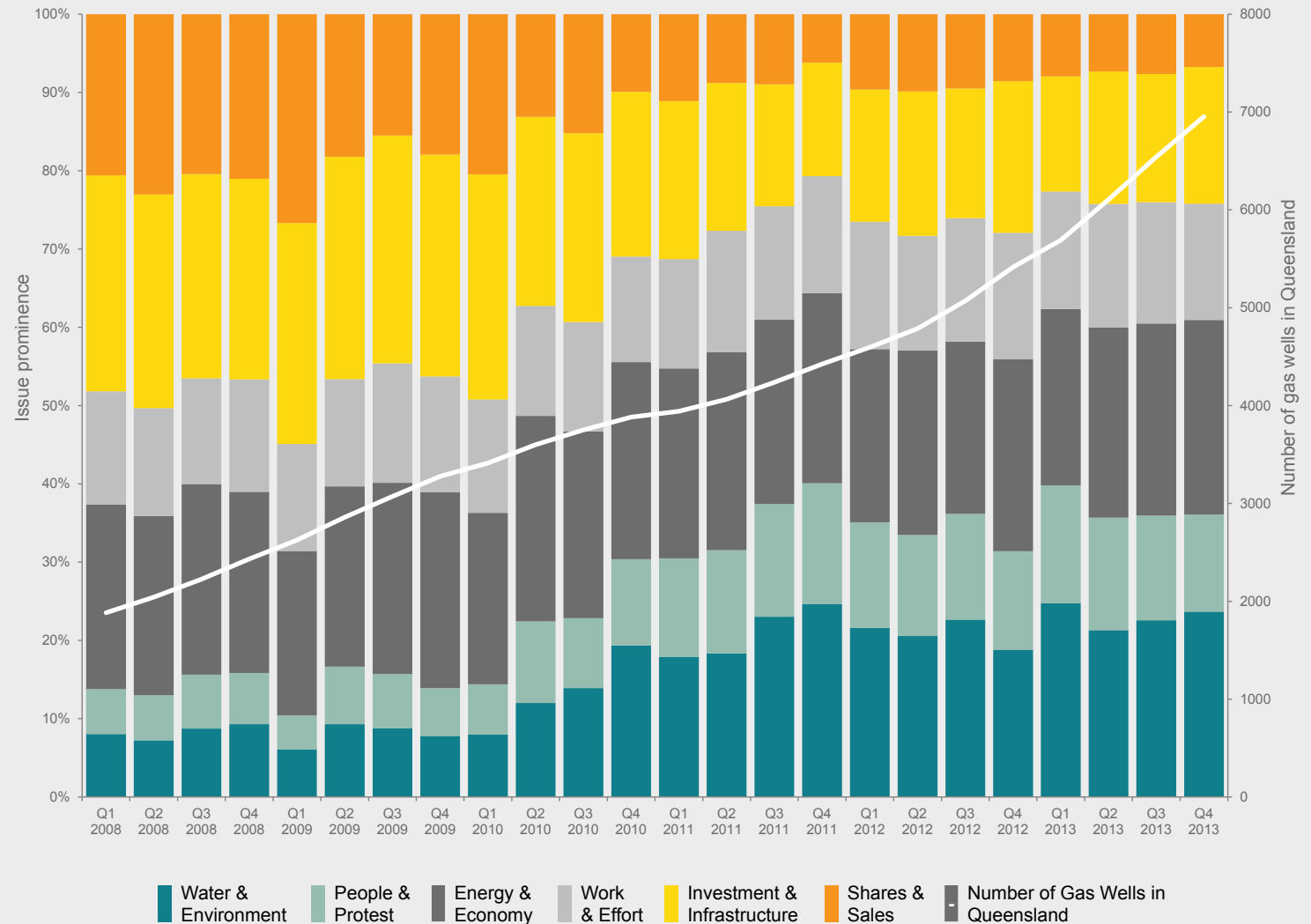
## RELATIONSHIP TO GAS WELL ACTIVITY

Figures provided by the Center for Coal Seam Gas on the number of gas wells (cumulative) in Queensland 2008-2013 have been mapped against changes in the prominence of issues and topics in news coverage over time.

Data have been sourced from the Queensland Government database, available at <http://mines.industry.qld.gov.au/geoscience/interactive-resource-tenure-maps.htm>. These data are released under a Creative Commons licence with copyright to the Department of Natural Resources and Mines.

Note: Data are cumulative and include both active and inactive wells.

Figure 4: Number of active gas wells in Queensland and issue prominence 2008-2013





# THE STAKEHOLDERS AND STAKESEEKERS

More than 7,000 individual stakeholders and stakeseekers have appeared in news media coverage from 2008-2013. Of these, nine groups comprising 80 individuals emerge prominently in the course of the debate over time. Industry and federal government form the two most prominent groups.

Table 5 provides a summary of the top stakeholders and stakeseekers by group. Table 6 provides a summary of the 32 industry stakeholders and stakeseekers located within the overall top 80.

A detailed list of the top stakeholders and stakeseekers, including names and position titles, is provided as Appendix B.

*“The right joins with the left, the greens and nationals align. Cutting squarely across the usual partisan faultlines, the coal seam gas issue has fired up the most unlikely of alliances.”*

Tony Walker and Dan Hall  
The Australian Financial Review, 29 October 2011

**Table 5: Top stakeholders by group 2008-2013**

Group	Individuals (n)	Prominence (%)
Industry (see table 6)	32	34.6
Government Federal	21	31.2
Government State Qld	10	8.9
Issue Advocates*	9	8.9
Government State NSW	7	10.4
Government State Vic	2	1.0
Government State WA	1	3.5
Government Local Qld	1	1.1
Government State NT	1	0.4
<b>Total</b>	<b>84**</b>	<b>100</b>

\* Lock The Gate, AgForce, NSW Farmers' Association, Alan Jones.

\*\* 4 stakeholders/stakeseekers changed affiliation during the period of analysis (i.e. moved from industry to government).

**Table 6: Top industry stakeholders 2008-2013**

Group	Individuals (n)	Prominence (%)	Group	Individuals (n)	Prominence (%)
Santos	4	17.4	Chevron	1	2.6
Woodside	2	15.9	QRC	1	2.5
APPEA	4	11.3	Metgasco	1	2.4
Analyst	5	11.0	Shell	1	2.2
BG/QGC	3	8.9	Eastern Star Gas	1	1.7
Origin	2	8.4	EnergyQuest	1	1.6
Arrow	2	5.4	Clive Palmer	1	1.0
AGL	2	3.9	<b>Total</b>	<b>32</b>	<b>100</b>
Oil Search	1	3.8			

## STAKEHOLDER PROMINENCE OVER TIME

**Between 2008-2013, news coverage of CSG became increasingly politicised and industry consistently lost share of voice to competing stakeholders and stakeholders, including federal and state government representatives and issue advocates.**

Over time, a connection between peaks in federal government voices and peaks in the intensity of media coverage emerges. This relationship is most visible in four quarters - Quarter 3 2009, Q4 2010, Q4 2011 and Q1 2013.

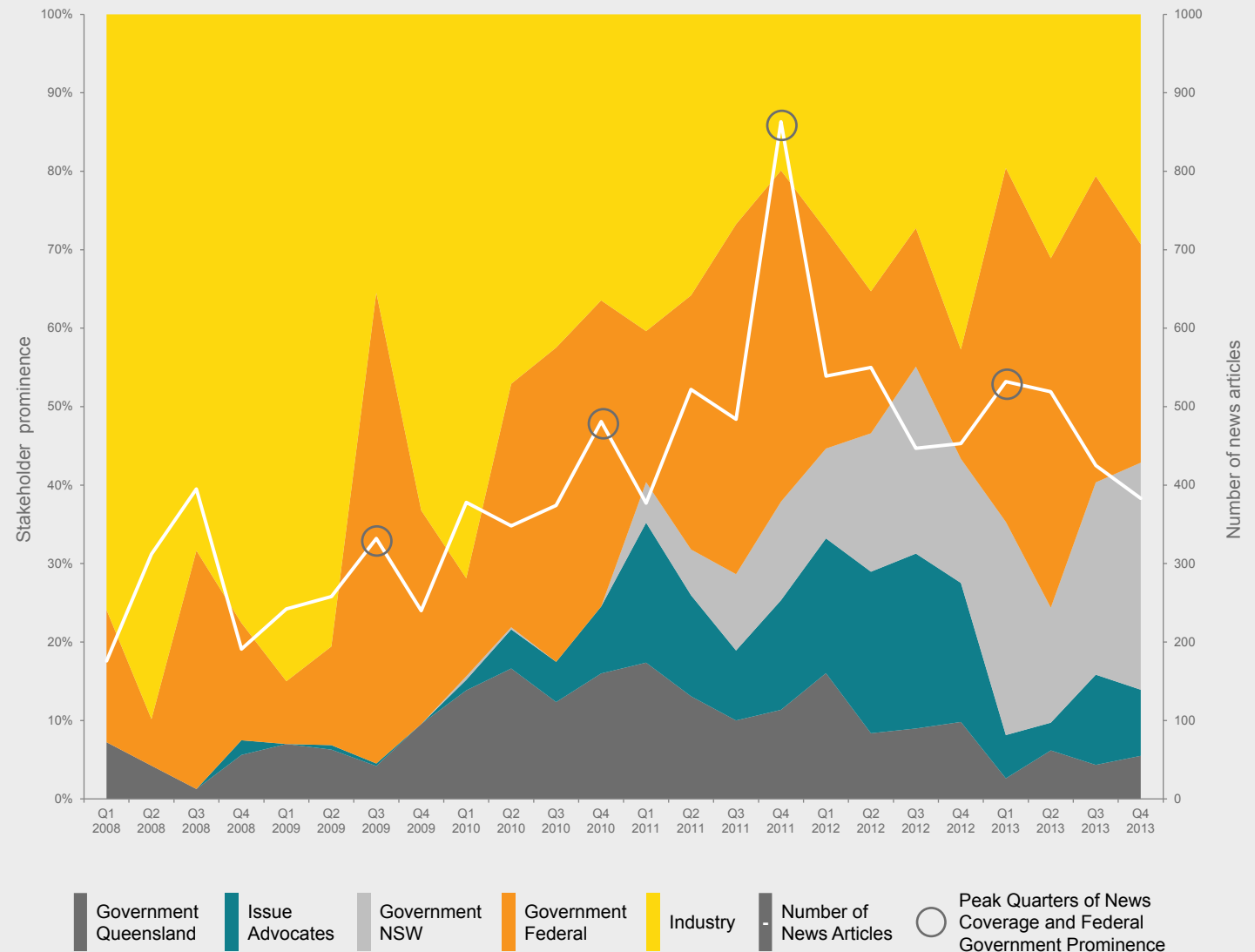
A timeline analysis of the interplay between federal government stakeholders, the intensity of media attention and shifts in the prominence of issues and topics in each of these four quarters is provided on pages 14-15.

*"This has now become a test of democracy.*

*It's time for state and federal governments to listen to the community rather than the industry lobbyists and stop this unwanted industrial invasion."*

Ian Gaillard, Lock the Gate  
ABC News, 23 October 2013

**Figure 5: Intensity of media coverage and top stakeholder prominence 2008-2013**



# ESCALATING MEDIA COVERAGE

A timeline of four key peaks, the stakeholders, events and issues.

## A GREEN LIGHT FOR GORGON AND GAS

Gas has bipartisan support at all levels of government and stories of 'Investment and Infrastructure' dominate the media landscape.

### The news coverage

News coverage is focused on final federal government approvals for the Gorgon project in Western Australia and a record-breaking \$50 billion deal to supply liquefied natural gas to China. LNG is touted as a green solution to growing global energy needs and a boost to the Australian economy.

### Top 5 stakeholders

- Martin Ferguson, Federal Minister for Resources and Energy
- Kevin Rudd, Prime Minister of Australia
- Peter Garrett, Federal Minister for Environment
- Colin Barnett, Premier of Western Australia
- David Knox, CEO Santos

**"Gorgon will be the biggest single investment made in Australia, creating 6000 jobs and producing \$300 billion worth of LNG to sell to Asia Pacific customers over the next 20 years."**

- Kevin Rudd, The Age, 18 August 2009

## MANAGING RISK

Concern over environmental risk delays federal government approval for major projects in Queensland.

### The news coverage

News coverage is focused on federal government delays to approve the Gladstone LNG projects over environmental concerns, particularly risk to water supplies. Cancer-causing agents are discovered in Surat Basin wells, community concern rises and environment protection groups call for moratoriums to allow time for scientific research. The academy award nominated film Gasland premiers in Australia.

**"I have decided that these projects can go ahead..." said Mr Burke. However he placed 300 conditions on each... "We must protect the Great Artesian Basin, our threatened species, our waterways and the Great Barrier Reef."**

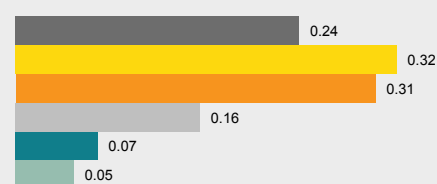
- The Gold Coast Bulletin, 23 October 2010

### Top 5 stakeholders

- Tony Burke, Federal Minister for Environment
- Anna Bligh, Premier of Queensland
- David Knox, CEO Santos
- Don Voelte, CEO Woodside Energy
- Drew Hutton, Friends of the Earth



### The big issues



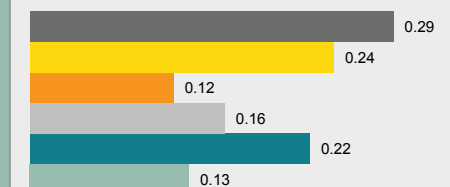
332  
Q3  
2009

481  
Q4  
2010

**"There are so many question marks over this industry and the government is rushing blindly into it... There needs to be an immediate moratorium to allow time for proper research and environmental impact studies."**

- Drew Hutton, The Australian, 20 October 2010

### The big issues



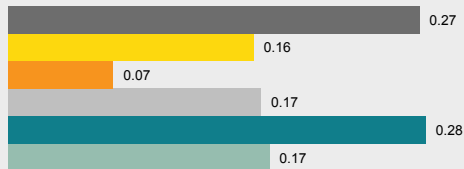
*"...the bad guy, at least as far as the industry is concerned, is New England independent Tony Windsor...when you're Windsor, who helped deliver power to Julia Gillard in 2010, your message invariably gets a hearing, particularly with the debate on landmark carbon tax scheme legislation also hovering in the background."*

- Perry Williams, The Australian, 7 November 2011

Q4  
2011

863

### The big issues



## ESCALATION AND A FEDERAL ELECTION

CSG exploration in western Sydney and rising community concern pushes CSG into the federal election campaign.

### The news coverage

News coverage is focused on CSG exploration in residential areas of western Sydney and its growing prominence as a federal election issue in the state. Federal Environment Minister Tony Burke proposes legislation that will make mining developments with the potential to significantly impact water resources subject to federal assessment. After initially refusing to adopt stricter federal government environmental assessments, the NSW state government suspends CSG exploration in western Sydney before announcing a ban in all residential areas. Coverage of 'Water and Environment' issues peaks for the second time.

*"The federal government is considering tougher regulation of coal seam gas as Labor MPs warn it is becoming a significant issue in the electorally crucial regions of western Sydney and coastal NSW, where fears are growing of impacts on housing and water."*

- Sophie Morris, The Australian Financial Review, 7 February 2013



### Top 5 stakeholders

- Tony Burke, Federal Minister for the Environment
- Barry O'Farrell, Premier of New South Wales
- Tony Windsor, Independent Federal MP for New England
- Chris Hartcher, NSW Minister for Energy & Resources
- Jeremy Buckingham, NSW Greens Legislative Council

532

Q1  
2013

## POLITICS, CONFLICT & CONTROVERSY

Conflict at the highest levels of government ignites intense media coverage and shines a spotlight on environmental risk.

*"It is imperative action is taken against companies that are ploughing ahead with projects and not listening to the community. I've decided enough's enough."*

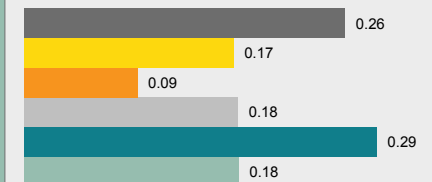
-Tony Windsor  
The Australian, 1 November 2011



### Top 5 stakeholders

- Tony Windsor, Independent Federal MP for New England
- Anna Bligh, Premier of Queensland
- Julia Gillard, Prime Minister of Australia
- Drew Hutton, Lock the Gate
- Chris Hartcher, NSW Minister for Resources & Energy

### The big issues



Q4 2011 is a key peak quarter in the media discourse timeline. A detailed analysis of the stakeholders and stakeholders in the two preceding quarters (Q2 and Q3 2011) and the following quarter (Q1 2012) is provided as Appendix C.

### The news coverage

News coverage is focused on Federal Independent MP Tony Windsor's refusal to pass the minority government's controversial mining tax without increases to federal government authority to approve CSG projects and \$400 million to research environmental risk.

In Queensland, CSG becomes a state election issue. Opposition leader Campbell Newman declares if elected his government will not approve 'inappropriate' CSG extraction in the Scenic Rim. Premier Anna Bligh announces a \$1.8 billion education fund from gas royalties.

A national day of anti-CSG protest action is held.

*"What we are now seeing from Campbell Newman is knee-jerk panicked reaction to the fact that Bob Katter and his party are taking members off the LNP. That's no way to make policy and it's no way to run a mining industry."*

- Anna Bligh, ABC News, 3 November 2011

# GAS IN THE UNITED STATES NEWS 2008-2013

## ISSUES AND TOPICS

Content analysis of 17,459 news articles published by six national and three state\* US media outlets between 2008-2013 revealed five central issues comprising 96 topics. These issues and key topics are detailed in Table 7. A list of news sources and article count is detailed in Table 8. A complete list of all news sources is included as Appendix D.

Figure 6 shows the relationship between the issues in US news coverage of Unconventional Gas.

\*State publications were sourced from Pennsylvania and Texas, the two US states with the largest number of operational gas wells.

*“The natural gas boom has led to cleaner power and greater energy independence.”*

President Barack Obama (State of the Union Address), Washington Post, 15 February 2013

**Table 7: US Issues and topics 2008-2013**

<b>ENERGY INDEPENDENCE &amp; ECONOMY</b>	The need to boost domestic unconventional gas extraction and energy/fuel production to achieve US energy independence, drive economic growth and employment, reduce carbon emissions, and transition away from oil. Unconventional gas is presented as a clean, green, and cheap alternative to foreign oil.	Key topics: natural, oil, energy, production, government, fuel, coal, use, plants, economic
<b>PIPELINES &amp; SUPPLY</b>	The pipeline and gas processing construction projects required to transport unconventional gas and supply domestic power and energy needs. Domestic energy prices also emerge.	Key topics: pipeline, power, project, customers, business, build, money, utility,
<b>WATER &amp; ENVIRONMENT</b>	Conflict and community concern over unconventional gas mining related ‘poisoning’ of drinking and agricultural water reserves and catchment areas, air pollution, and general threats to public health. Community protest and tax increases for unconventional gas drilling also emerge.	Key topics: drilling, drinking, fracking, wells, environmental, Pennsylvania, public, tax, air, study, land
<b>PEOPLE &amp; POWER</b>	People wielding authority (officials), people seeking to gain authority through collective voice, people as voters and the politicisation of unconventional gas, people as a labour resource and those who are victims of gas explosions.	Key topics: people, spokesman, explosion, home, workers, fire, political
<b>CONFLICT &amp; THE LAW</b>	The many layers of county, state, and federal legislative bodies and departmental agencies involved in approving, regulating, and restricting unconventional gas mining. Issue advocate use of legislative channels to halt unconventional gas mining also emerges.	Key topics: officials, federal, development, plan, area, local, bill, law, residents, site
<b>TRADE, PROFIT &amp; DEMAND</b>	Domestic and international gas supply and demand, share prices, and company profits/co-investments.	Key topics: billion, prices, earnings, market, deal, demand, shares, electricity, analyst

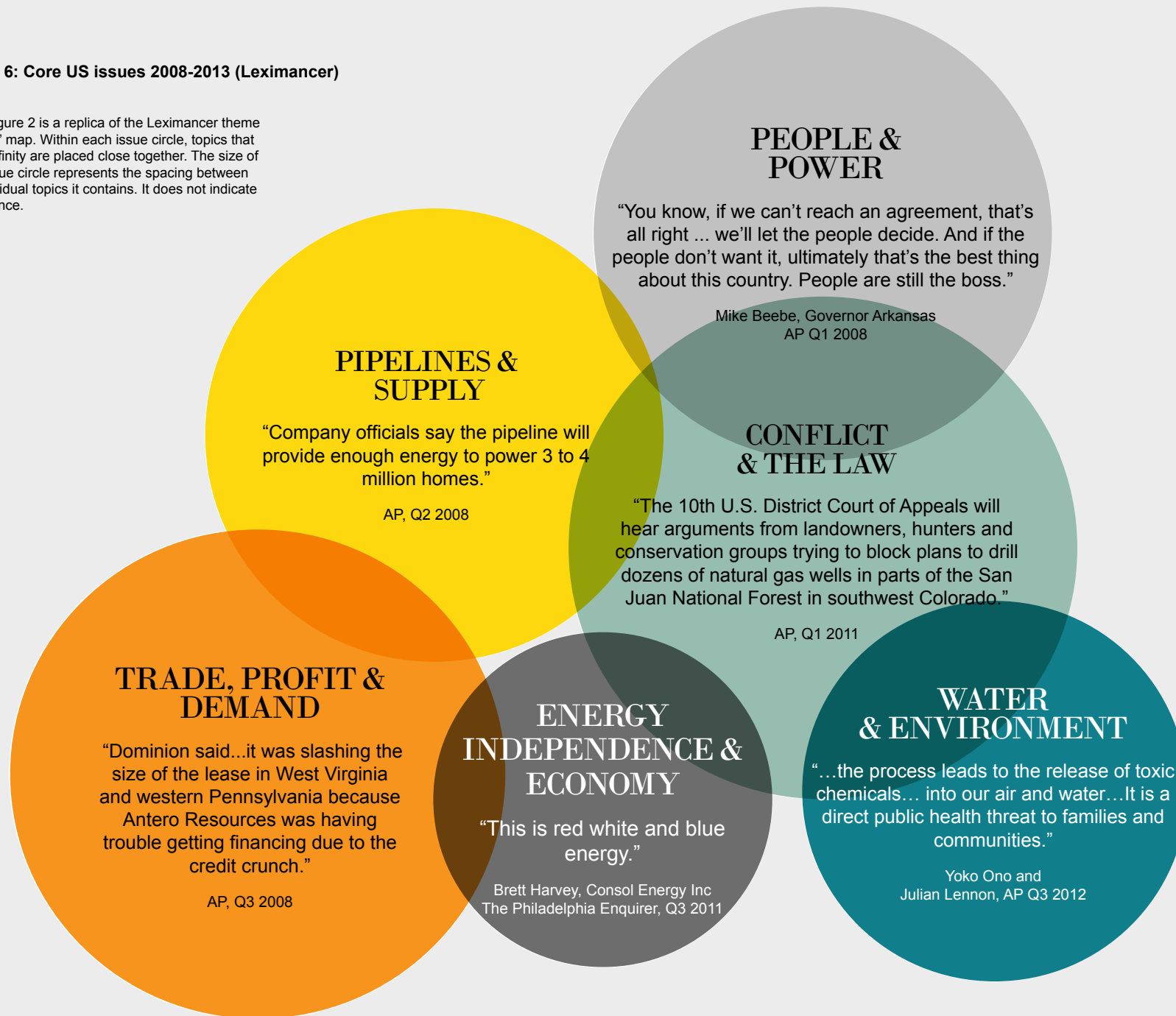
**Table 8: US news reports by source 2008-2013**

Source	n	%
National Publications	15,807	90.5
State Publications (Pennsylvania and Texas)	1,652	9.5
<b>Total</b>	<b>17,459</b>	<b>100</b>



**Figure 6: Core US issues 2008-2013 (Leximancer)**

Note: Figure 2 is a replica of the Leximancer theme or 'issue' map. Within each issue circle, topics that share affinity are placed close together. The size of each issue circle represents the spacing between the individual topics it contains. It does not indicate prominence.



## INTENSITY AND CHANGE OVER TIME

### Intensity

Media coverage in the US peaks in January-March (Q1) 2012. These three months represent more than 5 percent (n=961) of all 2008-2013 unconventional gas coverage and an increase on the previous quarter of 11.3 percent.

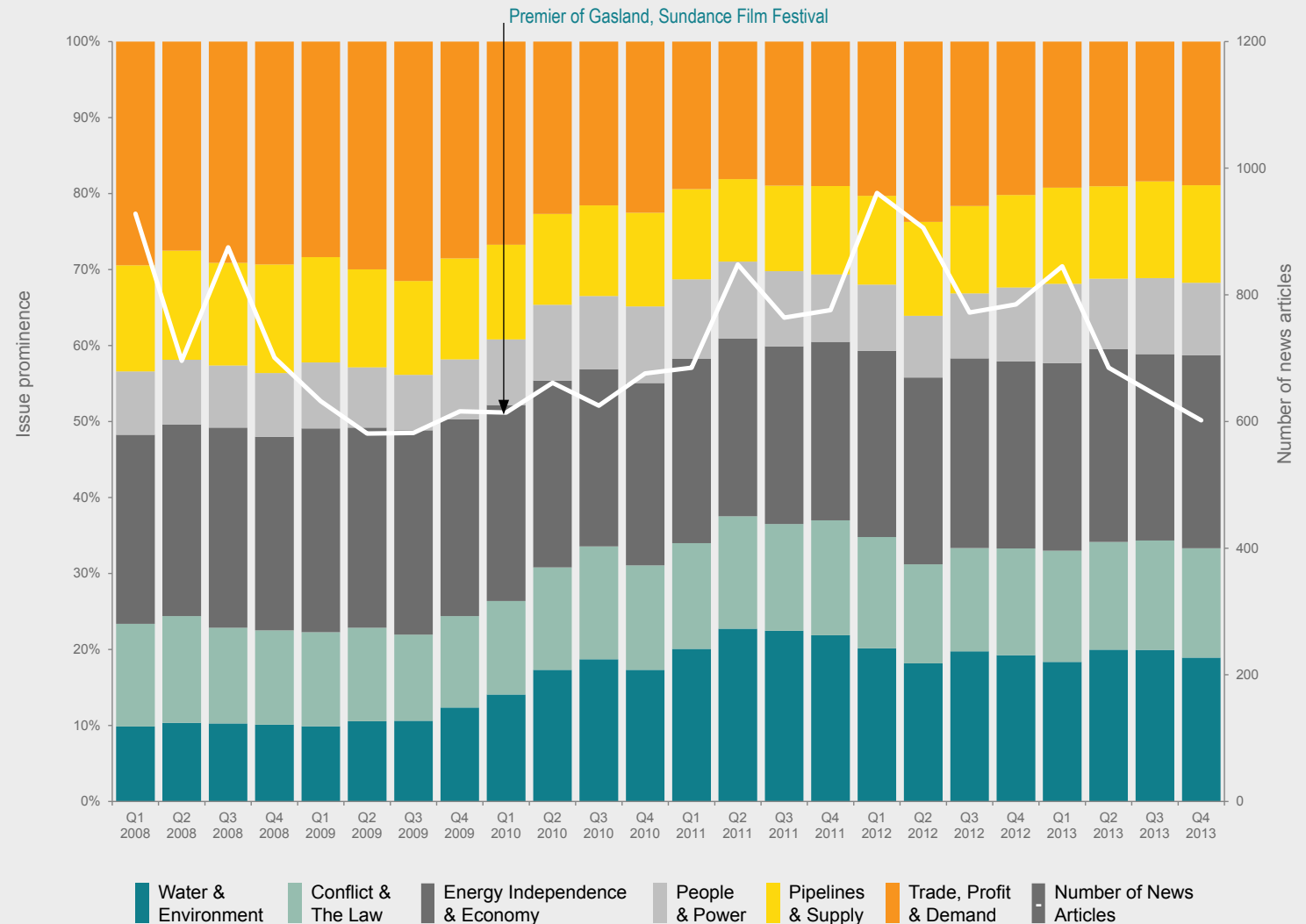
The Australian Q4 2011 peak represented more than 8 percent of all 2008-2013 media coverage and a 78.3 percent increase on the previous quarter.

### Issues and topics

In a pattern similar to Australia, issues and topics surrounding 'Water & Environment' begin to increase in prominence in US coverage in late 2009 and peak in April-December 2012. Likewise, coverage of unconventional gas as a business story begins to decline.

However, unlike in Australia, the issue of 'Energy Independence and Economy' remains dominant and the comparative decline of business and infrastructure stories is more moderate.

Figure 7: US news coverage intensity and issue prominence 2008-2013



## STAKEHOLDERS AND STAKESEEKERS

More than 20,000 individual stakeholders and stakeseekers have been mentioned in US media coverage of unconventional gas from 2008-2013. Of these, seven groups comprising 66 individuals emerge as prominent.

State government voices represent the most prominent group and consistently dominate the media discourse. Industry voices are more consistent and less dominant overall than in Australia.

Similar to the Australian story, issue advocate voices emerge in late 2008/early 2009 and strengthen over time.

A detailed list of the top 66 US stakeholders is provided as Appendix E.

Figure 8: US news coverage intensity and stakeholder prominence 2008-2013

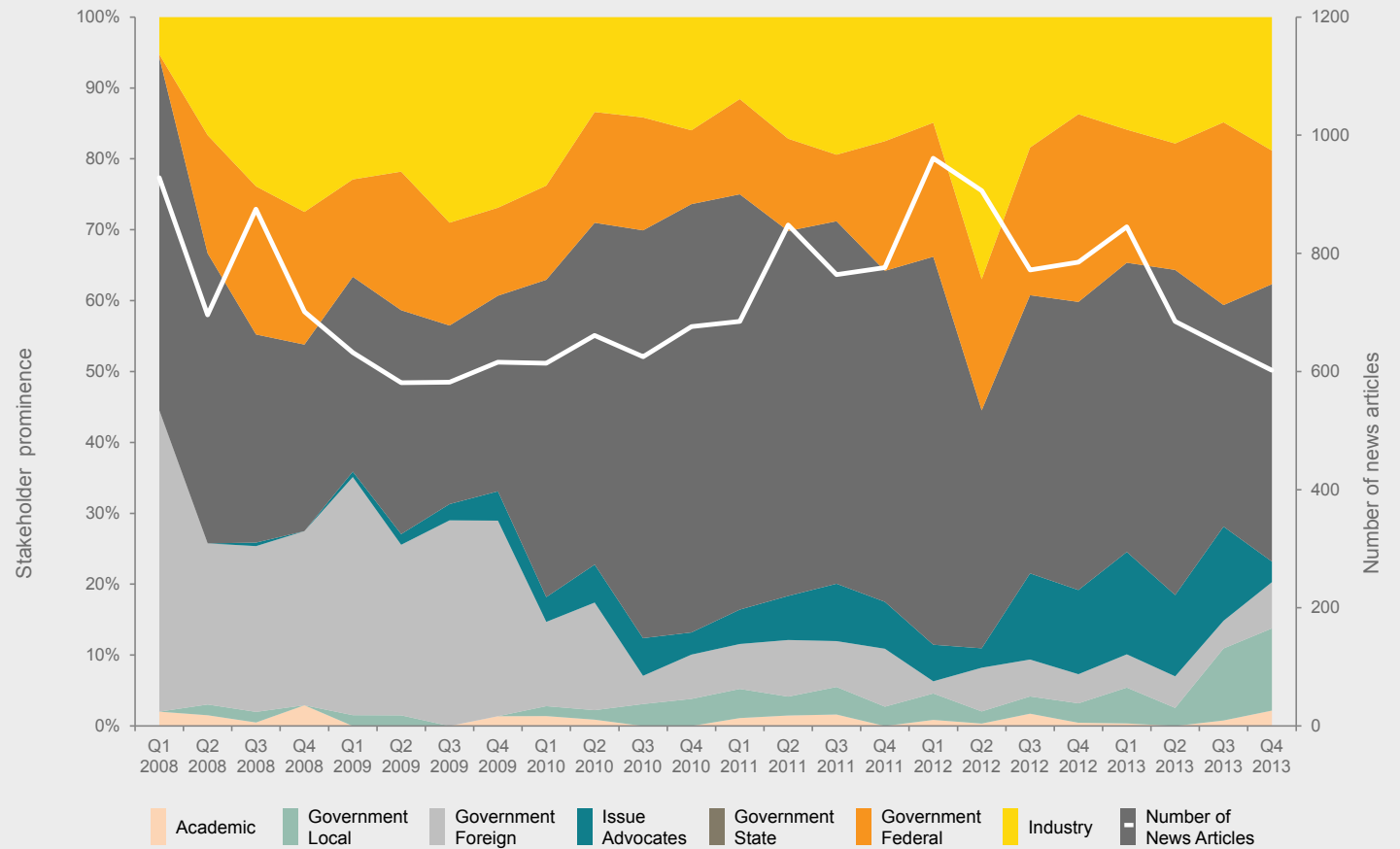


Table 9: Top US stakeholders by group 2008-2013

Group	Individuals (n)	Prominence (%)	Group	Individuals (n)	Prominence (%)
Government State	26	44.0	Issue Advocates	6	5.6
Industry	12	18.5	Government Local	3	2.9
Government Federal	9	16.0	Academic	1	0.9
Government Foreign	9	12.0	<b>Total</b>	<b>66</b>	<b>100</b>







# AUSTRALIA & THE US: SIMILARITIES & DIFFERENCES

**The pattern of increasing news coverage and a shift away from reports of CSG/ Unconventional Gas as a compelling business story towards one of environmental risk in Australia compares and contrasts to the US in important ways.**

## The comparisons

- **A similar conversation:** Issues and topics in media coverage centre around federal and state economies, energy, infrastructure, business, communities, landholders, water, environment and risk.
- **A similar trajectory:** News coverage begins to intensify in late 2009 and throughout 2010 before peaking in late 2011 (Australia)/early 2012 (US).
- **A similar emergence of opposition:** In Australia and the US issue advocate voices emerge in late 2008 and gain prominence over time.
- **A similar shifting balance—Business Vs Environment:** News coverage of business stories decreases as stories of risk, community concern and protest increase.
- **A similar tipping point:** Stories of risk peak in late 2011.
- **A similar ‘politicisation’ of the issue:** US at state level, Australia at federal and state level.
- **A similar changed media landscape:** News coverage of the threat to water and community objection/protest has increased in prominence and is now embedded in the public debate.

## The contrasts

- **A different economy:** Australia was ‘surviving on the profits of a mining boom’. The US has been battling recession and desperately needs jobs and state revenue.
- **A different energy need:** In the US, unconventional gas is a key resource to achieve energy independence.
- **A different national conversation:** In the US, topics surrounding ‘Energy Independence & Economy’ have maintained consistent dominance in the media discourse. In Australia, topics surrounding ‘Water & Environment’ have eclipsed coverage of ‘Energy & Economy’ on three occasions.
- **Different leadership:** In the US, stakeholder prominence has been consistently dominated by state government voices. Australia has seen erratic shifts in increasing government voices, particularly at federal level, and a dramatic decrease in the prominence and influence of industry.
- **Different messages:** Loss of bipartisan support for CSG in Australia has sent mixed messages to the public, created conflict and controversy, and amplified the intensity of media coverage. US politicians have been more consistent in their messaging.

- **Different opposition:** Prominent issue advocates in Australian media coverage are well organised grass roots groups who have garnered the support of those on the ground—the farmers—and established political connections. Prominent issue advocates in the US are celebrities such as Yoko Ono and Mark Ruffalo who ‘helicopter’ in.

*“The battle against coal seam gas mining has created an unlikely alliance between a shock jock, greenies and farmers.”*

Ben Langford  
Illawarra Mercury, 3 December 2011



# CONCLUSIONS

## KEY INSIGHTS FROM ISSUES MANAGEMENT RESEARCH

As issues develop and mature over time, the number of engaged stakeholders, publics and other influencers expands, positions on the issue become more entrenched and the strategic choices available to organisations to participate effectively in shaping a resolution shrink<sup>10</sup>.

When high levels of media coverage are reached, the issue typically becomes a polarising one and organisations have less ability to influence the media and public discourse<sup>11</sup>. A withdrawal from the public debate, or a failure to compete amongst increasing and competing voices, can further restrict the ability of organisations to exert influence<sup>12</sup>.

The politicisation of an issue, engagement of political elites, lack of bipartisan support and intensifying media coverage are key drivers of public concern and attention<sup>13</sup>.

Issues that emerge and compel public attention often persist for years and enter a state of 'issue-set inertia' - an environment in which the same issues persist over time while issue managers, even entire organisations, come and go<sup>14</sup>.

**Politicisation of CSG in Australia, particularly at federal government level, has been a central factor in the shifting thematic content and intensity of news coverage. This has been driven by a complex feedback system in which:**

- **issue advocates rely on media attention to mobilise public interest, garner political attention and drive political policy**
- **the engagement of political elites in the discourse surrounding CSG amplifies media coverage**
- **controversy and conflict between competing interests also serves to amplify media coverage**

## The issue escalation—a summary

As expansion of CSG activity has continued in Australia, the socio-political environment in which companies are operating has changed significantly.

Growing public concern over threats to water supplies and the environment, driven by well-organised grass roots issue advocates, intensifying media coverage, and the engagement of political elites has crystallised the risks surrounding the industry into a complex, polarising and entrenched public issue.

CSG is debated at the highest levels of government and companies are increasingly restricted by tightening government regulations and exclusion zones.

The relationship between: a) issue advocates b) elite industry and government stakeholders, and c) the media is not linear and cannot be captured in a simple cause and effect model. It is a cyclical system of complex, and continual, feedback.

## News coverage and conflict

Conflict between stakeholders and stakeholders engaged in the CSG debate has been a key driver of news attention. Quarters where conflict is high attract significantly more coverage.

In Q3 2009, when gas had bipartisan support at state and federal government levels and environmental opposition was minimal, media coverage of approval for the large-scale Gorgon project in Western Australia was reported as a win for the economy, jobs and environment. Coverage peaked at 332 articles for the quarter.

In comparison, in Q4 2010, when concerns over environmental risk delayed federal government approval for the Gladstone LNG projects, news coverage included reports that cancer-causing agents had been discovered in Queensland wells, and conflict between industry, government and issue advocates was high, media coverage peaked at 481 articles (an increase of 45% on Q3 2009).

## Stakeholders & stakeholders

### Political and business elites

As coverage of CSG as a business story has declined and media reports of risk and conflict have increased, industry has consistently lost share of voice to government stakeholders.

As government, particularly federal government, voices have engaged in the conflict surrounding CSG, they have attracted high levels of news attention and become drivers of both the intensity and the content of coverage.

In Q4 2011, federal government conflict over authority to approve CSG projects and debate over environmental risk drew the attention of the press. Coverage dramatically intensified and reports of issues relating to 'Water & Environment' increased.

### Issue advocates

Issue advocates have used the media to increase their prominence in the debate, gain credibility and advance their cause.

In Q4 2011, at the height of media coverage, Lock the Gate coordinated a national day of

protest action. It is impossible to ascertain if this was a calculated move to take advantage of the agenda space created by escalating media attention. However, Lock the Gate successfully gained prominence in the following three quarters and news coverage of 'Water & Environment' remained a consistent, and prominent, presence from Q4 2011 onwards.

The message for industry proponents, opponents and arbiters is clear: the sustained and effective involvement of key stakeholders is the essential ingredient in advancing an agenda. Political elites and other key influencers have played a critical role in shaping the increasingly contentious discourse around the legitimacy of the CSG industry and will continue to do so. Today, CSG has been permanently problematised as an industry and is embedded in media discourse as a contentious industry with questionable legitimacy. While the intensity of media interest will continue to wax and wane, this representation is unlikely to change without a fundamental transformation from within or without.

*"The ultimate [social] licence is getting agreement and alignment with both the national and state governments in Australia.*

*That's the licence that counts. That's the one you must secure to develop Australia's natural resources."*

Colin Barnett, Premier of Western Australia  
The Australian Financial Review, 8 April 2014

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11. Heath, R.L. (1997). *Strategic issues management: Organizations and public policy challenges*. Thousand Oaks, CA: Sage.

12. Dougall, E.K. (aka Mitchell) (2005). Revelations of an ecological perspective: Issues, inertia, and the public opinion environment of organizational populations. *Public Relations Review* 31(4), 534-543.

13. Boles, J. K. (1979). *The politics of the equal rights amendment: conflict and the decision process*: Longman New York.

14. Dougall, E.K. (aka Mitchell) (2005). *op. cit.*



# APPENDICES

# APPENDIX A

## Volume of Australian CSG news reports by source 1996-2013

### Regional/Rural - Qld and NSW

Source	Articles (n)			Articles (%)		
	1996-2007	2008-2013	Total	1996-2007	2008-2013	Total
The Northern Star	-	319	<b>319</b>	-	3.25	<b>2.25</b>
The Newcastle Herald	57	288	<b>345</b>	1.32	2.93	<b>2.44</b>
Gold Coast Bulletin	121	168	<b>289</b>	2.80	1.71	<b>2.04</b>
Dalby Herald	-	164	<b>164</b>	-	1.67	<b>1.16</b>
Queensland Country Life	-	148	<b>148</b>	-	1.51	<b>1.05</b>
Chinchilla News	-	128	<b>128</b>	-	1.30	<b>0.90</b>
The Land	-	118	<b>118</b>	-	1.20	<b>0.83</b>
Illawarra Mercury	39	103	<b>142</b>	0.90	1.05	<b>1.00</b>
Moree Champion	-	51	<b>51</b>	-	0.52	<b>0.36</b>
Coffs Coast Advocate	-	48	<b>48</b>	-	0.49	<b>0.34</b>
Maitland Mercury	-	34	<b>34</b>	-	0.35	<b>0.24</b>
Armidale Express	-	7	<b>7</b>	-	0.07	<b>0.05</b>
Western Times	-	5	<b>5</b>	-	0.05	<b>0.04</b>
Toowoomba's Mail	-	4	<b>4</b>	-	0.04	<b>0.03</b>
Lithgow Mercury	-	2	<b>2</b>	-	0.02	<b>0.01</b>
Goondiwindi Argus	-	1	<b>1</b>	-	0.01	<b>0.01</b>
<b>Sub-total</b>	<b>217</b>	<b>1588</b>	<b>1805</b>	<b>5.02</b>	<b>16.17</b>	<b>12.76</b>

### Metropolitan/National

Source	Articles (n)			Articles (%)		
	1996-2007	2008-2013	Total	1996-2007	2008-2013	Total
Australian Associated Press	1244	1762	<b>3006</b>	28.74	17.93	<b>21.24</b>
ABC News	474	1751	<b>2225</b>	10.95	17.83	<b>15.73</b>
The Australian Financial Review	684	1732	<b>2416</b>	15.81	17.64	<b>17.08</b>
The Australian	839	1306	<b>2145</b>	19.39	13.30	<b>15.16</b>
The Courier Mail	372	765	<b>1137</b>	8.60	7.79	<b>8.04</b>
Sydney Morning Herald	185	326	<b>511</b>	4.28	3.32	<b>3.61</b>
The Age	189	314	<b>503</b>	4.37	3.20	<b>3.56</b>
The Canberra Times	122	150	<b>272</b>	2.82	1.53	<b>1.92</b>
Daily Telegraph	-	74	<b>74</b>	-	0.75	<b>0.52</b>
Crikey	1	42	<b>43</b>	0.02	0.43	<b>0.30</b>
news.com.au	-	11	<b>11</b>	-	0.11	<b>0.08</b>
<b>Sub-total</b>	<b>4110</b>	<b>8233</b>	<b>12343</b>	<b>94.98</b>	<b>83.83</b>	<b>87.24</b>

### Total all

Articles 1996-2009	Articles 2008-2013	Articles 1996-2013
<b>4327</b>	<b>9821</b>	<b>14,148</b>



# APPENDIX B

## Top 80 stakeholders and stakeholders in Australian CSG media coverage 2008-2013

NAME	DESCRIPTION		COUNT
David Knox	<ul style="list-style-type: none"> <li>Managing Director and Chief Executive Officer Santos July 2008-current (previously Acting Chief Executive Officer March 2008-July 2008)</li> <li>Santos Executive Vice President Growth Businesses 2003-March 2008</li> <li>Chairman of the Australian Petroleum Production and Exploration Association (APPEA)</li> </ul>	Industry	417
Martin Ferguson	<ul style="list-style-type: none"> <li>Federal Minister for Resources and Energy 3 December 2007-22 March 2013</li> </ul>	Government, Federal (Labor)	381
Tony Burke	<ul style="list-style-type: none"> <li>Manager of Opposition Business in the House 18 September-current</li> <li>Federal Minister for Immigration, Multicultural Affairs and Citizenship 1 July 2013-18 September 2013</li> <li>Federal Minister for the Arts 25 March 2013-18 September 2013</li> <li>Federal Minister for Sustainability, Environment, Water, Population and Communities 14 September 2010-1 July 2013</li> <li>Federal Minister for Agriculture, Fisheries and Forestry 3 December 2007-14 September 2010</li> </ul>	Government, Federal (Labor)	347
Drew Hutton	<ul style="list-style-type: none"> <li>President (and founder) of Lock The Gate Alliance, 2010-current</li> </ul>	Issue Advocate	340
Don Voelte	<ul style="list-style-type: none"> <li>Managing Director and Chief Executive Officer of Woodside Petroleum Limited 2004-2011</li> </ul>	Industry	336
Colin Barnett	<ul style="list-style-type: none"> <li>Premier of Western Australia 23 September 2008-current</li> </ul>	Government, State (Liberal)	334
Anna Bligh	<ul style="list-style-type: none"> <li>Premier of Queensland 13 September 2007-26 March 2012</li> </ul>	Government, State (Labor)	311
Chris Hartcher	<ul style="list-style-type: none"> <li>NSW Minister for Resources and Energy and Minister for the Central Coast 3 April 2011-4 December 2013</li> </ul>	Government, State (Liberal)	288
Tony Windsor	<ul style="list-style-type: none"> <li>Independent member of the Australian House of Representatives 2001-2013, representing the electorate of New England</li> </ul>	Government, Federal (Independent)	284
Grant King	<ul style="list-style-type: none"> <li>Managing Director of Origin Energy February 2000-current</li> </ul>	Industry	230
Barry O'Farrell	<ul style="list-style-type: none"> <li>Premier of NSW 28 March 2011-16 April 2014</li> <li>Leader of the Opposition of NSW 4 April 2007-28 March 2011</li> </ul>	Government, State (Liberal)	230
Tony Abbott	<ul style="list-style-type: none"> <li>Prime Minister of Australia 18 September 2013-current</li> <li>Leader of the Opposition 1 December 2009-18 September 2013</li> <li>Member for Warringah (north of Sydney) since 1994</li> </ul>	Government, Federal (Liberal)	223
Julia Gillard	<ul style="list-style-type: none"> <li>Prime Minister of Australia 24 June 2010-27 June 2013</li> </ul>	Government, Federal (Labor)	221
Kevin Rudd	<ul style="list-style-type: none"> <li>Prime Minister of Australia 27 June 2013-18 September 2013</li> <li>Prime Minister of Australia 3 December 2007-23 June 2010</li> </ul>	Government, Federal (Labor)	212
Peter Coleman	<ul style="list-style-type: none"> <li>Chief Executive Officer Woodside Petroleum 30 May 2011-current</li> </ul>	Industry	181
Rick Wilkinson	<ul style="list-style-type: none"> <li>Chief Technical Officer Australian Petroleum Production &amp; Exploration Association (APPEA) October 2013-Present</li> <li>Commissioner Gas Fields Commission Queensland July 2012-Present</li> <li>Chief Operating Officer - Eastern Australia APPEA July 2011-October 2013</li> <li>President GLNG &amp; Vice President Queensland, Santos Ltd, September 2008-June 2011</li> </ul>	Industry	179
Jeremy Buckingham	<ul style="list-style-type: none"> <li>Country Greens member of the NSW Legislative Council (since 2011). Holds key portfolio responsibilities of Mining, Coal Seam Gas, Murray Darling basin, Agriculture, Genetic Engineering, Regional Development and Western NSW</li> </ul>	Government, State (Greens)	175
Ian Macfarlane	<ul style="list-style-type: none"> <li>Federal Member for Groom (inc Toowoomba), Queensland, 1998, 2001, 2004 and 2007</li> <li>Federal Minister for Industry 18 September 2013-current</li> <li>Shadow Minister for Infrastructure and Water from 8 December 2009 - 25 March 2010</li> <li>Climate Change Spokesman for the Coalition in 2009</li> </ul>	Government, Federal (Liberal)	156
Campbell Newman	<ul style="list-style-type: none"> <li>Premier of Queensland 26 March 2012-current</li> <li>Leader of the Queensland Liberal National Party 2 April 2011-current</li> </ul>	Government, State (Liberal)	140

<b>Wayne Swan</b>	<ul style="list-style-type: none"> <li>Deputy Prime Minister of Australia 24 June 2010-27 June 2013 and Treasurer 3 December 2007-27 June 2013</li> </ul>	Government, Federal (Labor)	135
<b>Peter Garrett</b>	<ul style="list-style-type: none"> <li>Federal Minister for Environment Protection, Heritage and the Arts 3 December 2007-14 September 2010</li> </ul>	Government, Federal (Labor)	129
<b>Peter Botten</b>	<ul style="list-style-type: none"> <li>Managing Director Oil Search 1994-current</li> </ul>	Industry	124
<b>Brad Hazzard</b>	<ul style="list-style-type: none"> <li>NSW Minister for Planning and Infrastructure 4 April 2011-current</li> </ul>	Government, State (Liberal)	119
<b>Barnaby Joyce</b>	<ul style="list-style-type: none"> <li>Federal Minister for Agriculture and Deputy Leader of the National Party of Australia 18 September 2013-current</li> <li>Elected to Senate in 2004 election member for New England (NSW)</li> </ul>	Government, Federal (National)	113
<b>Bob Brown</b>	<ul style="list-style-type: none"> <li>Leader of the Australian Greens 28 November 2005-13 April 2012</li> </ul>	Government, Federal (Greens)	113
<b>Frank Chapman</b>	<ul style="list-style-type: none"> <li>BG Group Managing Director 23 October 2000-December 2012 (remained as advisor until formal retirement in June 2013)</li> </ul>	Industry	112
<b>Fiona Simson</b>	<ul style="list-style-type: none"> <li>President Board of Directors NSW Farmer's Association 2011-current</li> </ul>	Issue Advocate	111
<b>Larissa Waters</b>	<ul style="list-style-type: none"> <li>Federal Senator for Queensland 1 July 2011-current. Elected in August 2010 Greens spokesperson on Environment, Biodiversity and Natural Heritage; Population; Great Barrier Reef and Coral Sea; Cape York; World Heritage; Tourism; and Mining</li> </ul>	Government, Federal (Greens)	110
<b>Richard Cottee</b>	<ul style="list-style-type: none"> <li>Mining Entrepreneur and Managing Director Central Petroleum Ltd 13 March 2013-current</li> <li>Chief Executive Officer Central Petroleum Ltd June 2012-March 2013</li> <li>Chief Executive Officer/Managing Director Nexus Energy 3 May 2010-22 September 2011</li> </ul>	Industry	108
<b>John Hirjee</b>	<ul style="list-style-type: none"> <li>Deutsche Bank analyst</li> </ul>	Industry analyst	104
<b>Ray Brown</b>	<ul style="list-style-type: none"> <li>Dalby Regional Council Mayor 2008-current</li> </ul>	Government, Local, Queensland	102
<b>Nick Davies</b>	<ul style="list-style-type: none"> <li>Operations Manager Northern Exploration Arrow Energy, Dart Energy chairman up to 26 November 2013</li> </ul>	Industry	101
<b>Alan Jones</b>	<ul style="list-style-type: none"> <li>Media (issues commentator)</li> </ul>	Issue Advocate	99
<b>Belinda Robinson</b>	<ul style="list-style-type: none"> <li>Chief Executive Australian Petroleum Production &amp; Exploration Association (APPEA) April 2005-2011</li> </ul>	Industry	97
<b>Bob Katter</b>	<ul style="list-style-type: none"> <li>Federal member for Flinders (Queensland) 1993-2011</li> </ul>	Government, Federal (Independent)	89
<b>Christine Milne</b>	<ul style="list-style-type: none"> <li>Leader of the Australian Greens 13 April 2012-current</li> <li>Deputy Leader of the Australian Greens 10 November 2008-13 April 2012</li> </ul>	Government, Federal (Greens)	86
<b>Roy Krzywosinski</b>	<ul style="list-style-type: none"> <li>Managing Director Chevron Australia January 2008-current</li> </ul>	Industry	85
<b>Michael Roche</b>	<ul style="list-style-type: none"> <li>Chief Executive Queensland Resources Council June 2005-current</li> </ul>	Industry	83
<b>Michael Fraser</b>	<ul style="list-style-type: none"> <li>Managing Director and Chief Executive Officer AGL Energy October 2007-current</li> <li>Chairman Board of the Clean Energy Council (CEC) September 2011-current</li> </ul>	Industry	83
<b>Rob Oakeshott</b>	<ul style="list-style-type: none"> <li>Member of the Australian Parliament for Lyne (NSW) 6 September 2008-5 August 2013</li> </ul>	Government, Federal (Independent)	81
<b>Jeff Seeney</b>	<ul style="list-style-type: none"> <li>Deputy Premier of Queensland and Minister for State Development of Queensland and Minister for Infrastructure and Planning of Queensland 26 March 2012-current</li> </ul>	Government, State (Liberal)	79
<b>Andrew Fraser</b>	<ul style="list-style-type: none"> <li>Deputy Premier of Queensland 16 September 2011-26 March 2012</li> <li>Treasurer of Queensland 13 September 2007-26 March 2012</li> </ul>	Government, State (Labor)	79
<b>Adrian Wood</b>	<ul style="list-style-type: none"> <li>Macquarie analyst</li> </ul>	Industry	79
<b>Peter Henderson</b>	<ul style="list-style-type: none"> <li>Chief Executive Metgasco April 2011-current</li> </ul>	Industry	78
<b>James Baulderstone</b>	<ul style="list-style-type: none"> <li>Vice President Eastern Australia Santos 1 September 2010-current</li> </ul>	Industry	77
<b>Shaun Scott</b>	<ul style="list-style-type: none"> <li>Chief Executive Arrow Energy 2004-2010</li> <li>Non-Executive Director Dart Energy September 2010-current</li> </ul>	Industry	75
<b>Mark Greenwood</b>	<ul style="list-style-type: none"> <li>JP Morgan analyst</li> </ul>	Industry	72
<b>Catherine Tanna</b>	<ul style="list-style-type: none"> <li>Chairman BG (QGC) Australia</li> </ul>	Industry	71
<b>Bill Heffernan</b>	<ul style="list-style-type: none"> <li>November 2011 Senate Committee on Rural Affairs and Transport inquiry chairman and Liberal Senator</li> </ul>	Government, Federal (Liberal)	71
<b>Ann Pickard</b>	<ul style="list-style-type: none"> <li>Chairman Shell Australian August 2010-April 2013</li> </ul>	Industry	71
<b>David Byers</b>	<ul style="list-style-type: none"> <li>Chief Executive Officer Australian Petroleum Production and Exploration Association October 2011-current</li> </ul>	Industry	69

<b>Jess Moore</b>	• President Stop Coal Seam Gas Illawarra	Issue Advocate	64
<b>Stephen Robertson</b>	• Queensland Minister for Energy and Water Utilities 26 March 2009-26 March 2012	Government, State (Labor)	64
<b>Gordon Ramsay</b>	• UBS analyst	Industry	61
<b>Mary O'Kane</b>	• NSW Chief Scientist and Engineer - conducted a review of NSW CSG operations	Government (Department)	60
<b>Penny Blatchford</b>	• Chair of the Bellata/Gurley CSG Action Group	Issue Advocate	58
<b>Andrew Stoner</b>	• Deputy Premier NSW, Minister for Trade and Investment, and Minister for Regional Infrastructure and Services 28 March 2011-current	Government, State (Liberal)	57
<b>John Anderson</b>	• Chairman Eastern Star Gas October 2007-current	Industry	55
<b>Ross Dunn</b>	• Director Queensland Coal Seam Gas September 2010-current	Industry	54
<b>Ian Hayllor</b>	• Dalby farmer and Basin Sustainability Alliance • President Chairperson Qld Gasfields Commission	• Issue Advocate • Government/State (Department)	54
<b>Janelle Saffin</b>	• Federal MP for Page 24 November 2007-7 September 2013	Government, Federal	52
<b>Graeme Bethune</b>	• Chief Executive EnergyQuest 2005-current	Industry	51
<b>Peter Ryan</b>	• Deputy Premier of Victoria 2 December 2010-current and National Party Leader 2009-current	Government, State (National)	49
<b>Andrew Cripps</b>	• Queensland Minister for Natural Resources and Mines of Queensland and Queensland Legislative Assembly member 3 April 2012-current • MP for Hinchinbrook	Government, State (Liberal)	49
<b>Peter Reith</b>	• Chair of 2013 Victorian Government Gas Market Taskforce report	Government (Department)	47
<b>John Robertson</b>	• NSW Opposition Leader 31 March 2011-current	Government, State (Labor)	47
<b>Stirling Hinchliffe</b>	• Queensland Minister for Mining 21 February 2012-26 March 2012 • Queensland Minister for Infrastructure and Planning of Queensland 26 March 2009-21 February 2011	Government, State (Liberal)	46
<b>John Cotter</b>	• AgForce President Chair until September 2010 • Chair of Qld Gasfields Commission April 2012-current	• Issue Advocate • Government/State (Department)	46
<b>Kevin McCann</b>	• Chairman Origin Energy October 2000-2013	Industry	45
<b>Drew Wagner</b>	• Policy Director AgForce	Issue Advocate	45
<b>Sam Crafter</b>	• Public Affairs Advisor Santos	Industry	44
<b>Mike Moraza</b>	• Spokesman AGL Energy	Industry	44
<b>Malcolm Turnbull</b>	• Shadow Treasurer of Australia 3 December 2007-16 September 2008 • Federal Minister for Communications 18 September 2013-current	Government, Federal (Liberal)	43
<b>Boudicca Cerese</b>	• Kyogle Group Against Gas	Issue Advocate	42
<b>Clive Palmer</b>	• Billionaire and mining tycoon • Leader Palmer United Party 1 April 2013-current • Federal Member for Fairfax 7 September 2013-current	• Industry • Government, Federal (PUP)	42
<b>Di Brookman</b>	• Citigroup analyst	Industry, Analyst	42
<b>Gary Gray</b>	• Federal Minister for Resources and Energy 25 March 2013 – 18 September 2013	Government, Federal (Labor)	42
<b>Greg Hunt</b>	• Shadow Minister for Climate Change, Environment and Urban Water November 2007-September 2013 • Federal Minister for Environment 18 September 2013-current	Government, Federal (Labor)	42
<b>Kate Jones</b>	• Queensland Minister for the Environment, Resource Management and Climate Change of Queensland 28 March 2009-20 June 2011	Government, State (Labor)	42
<b>Paul Henderson</b>	• Northern Territory Chief Minister 26 November 2007-29 August 2012	Government, State (Liberal)	42

**Q4 2011 represents a significant peak in the intensity of news coverage and reporting of issues relating to 'Water & Environment' and 'People and Protest'.**

This appendix presents the findings of a detailed analysis of the lead up to this quarter and the news media landscape immediately after.

It includes an analysis of the following four quarters:

- Q2 2011
- Q3 2011
- Q4 2011
- Q1 2012

### Stakeholders/stakeseekers

The following data is provided for each quarter:

- A pie graph snapshot showing the prominence of the main stakeholder groups
  - i. Federal Government
  - ii. Industry
  - iii. Queensland State Government
  - iv. NSW State Government
  - v. Issue Advocates
  - vi. Other Government (Victoria-State, NT-State, Queensland-Local, State-WA)
- A bar graph showing the prominence of sub-groups within each of the main stakeholder groups
- A list of the top 20 stakeholders and their prominence (percentage of all top stakeholder voices per quarter).

### Issues and Topics

A separate, highly-focused Leximancer content analysis was conducted for each quarter to investigate the prominence of topics present in news coverage. The top five topics in each quarter are included in the findings.

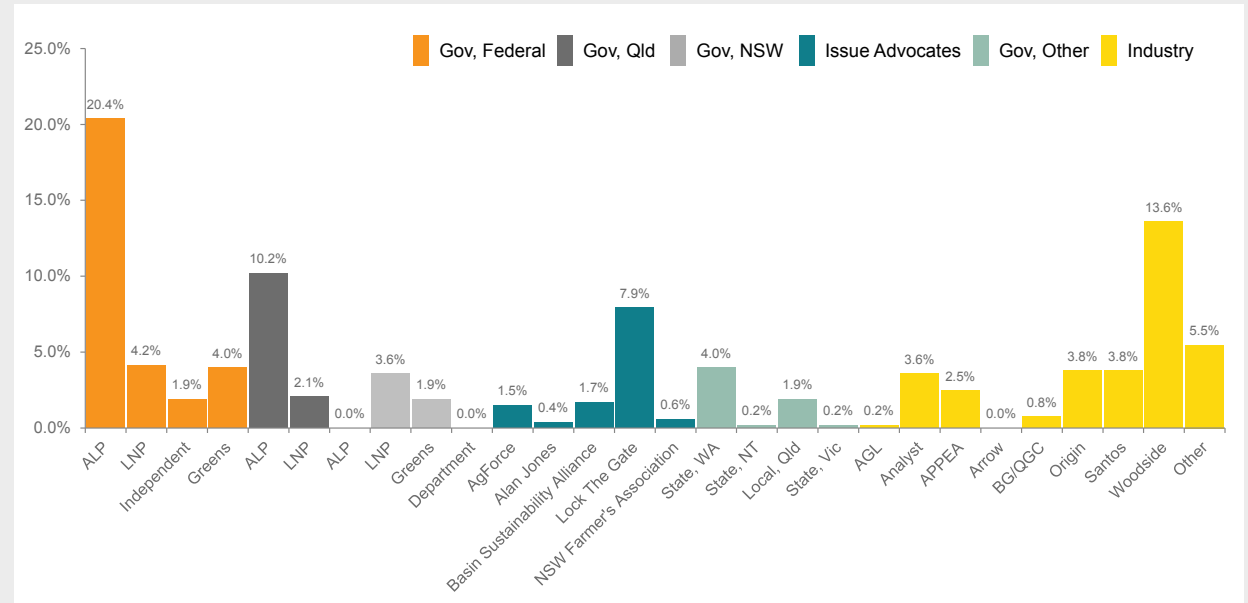
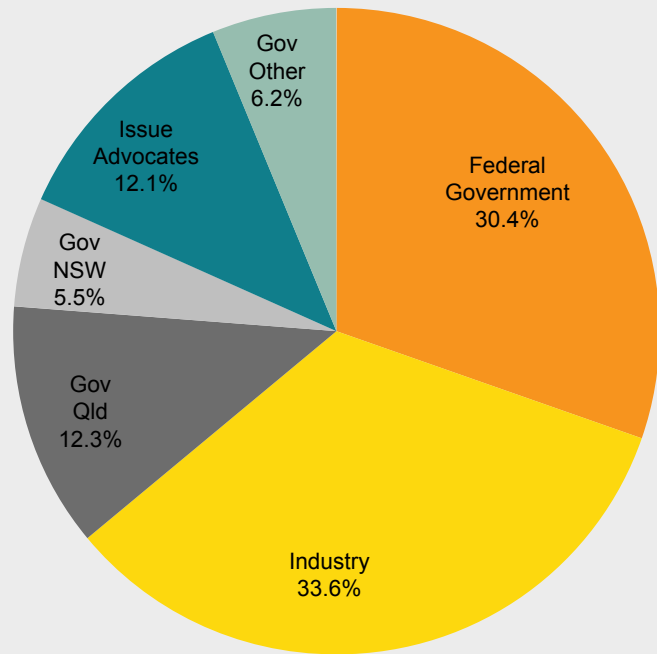
#### Note on results:

As the Leximancer content analysis was conducted on a per quarter basis (rather than using the topic coding produced from the whole 2008-2013 data set) a number of the topics are unique to the following quarter by quarter analysis.

## QUARTER SNAPSHOT

- Industry has the dominant share of voice at 33.6% and 4 of the top 10 voices in CSG news coverage are industry representatives.
- The five top topics in CSG news coverage are 'tax', 'resource', 'proposed' and 'resources'.

## INDUSTRY LEADS THE WAY: Q2 2011



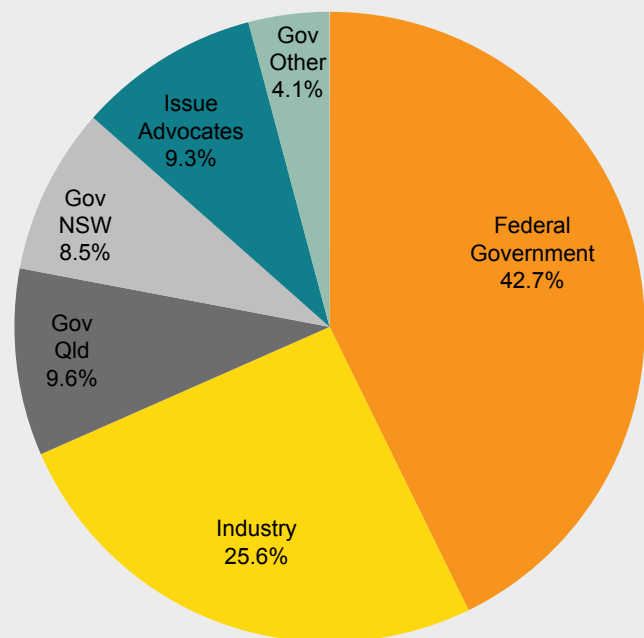
### Top 20 stakeholders and stakeesekers

Name	Group	Prominence (%)
Don Voelte	Industry, Woodside	10.4
Martin Ferguson	Government, Federal, ALP	8.5
Drew Hutton	Issue Advocate, Lock The Gate	7.4
Julia Gillard	Government, Federal, ALP	6.2
Anna Bligh	Government, State, Qld, ALP	4.0
Colin Barnett	Government, State, WA, LNP	4.0
Grant King	Industry, Origin	3.8
David Knox	Industry, Santos	3.4
Peter Coleman	Industry, Woodside	3.2
Kate Jones	Government, State, Qld, ALP	2.8

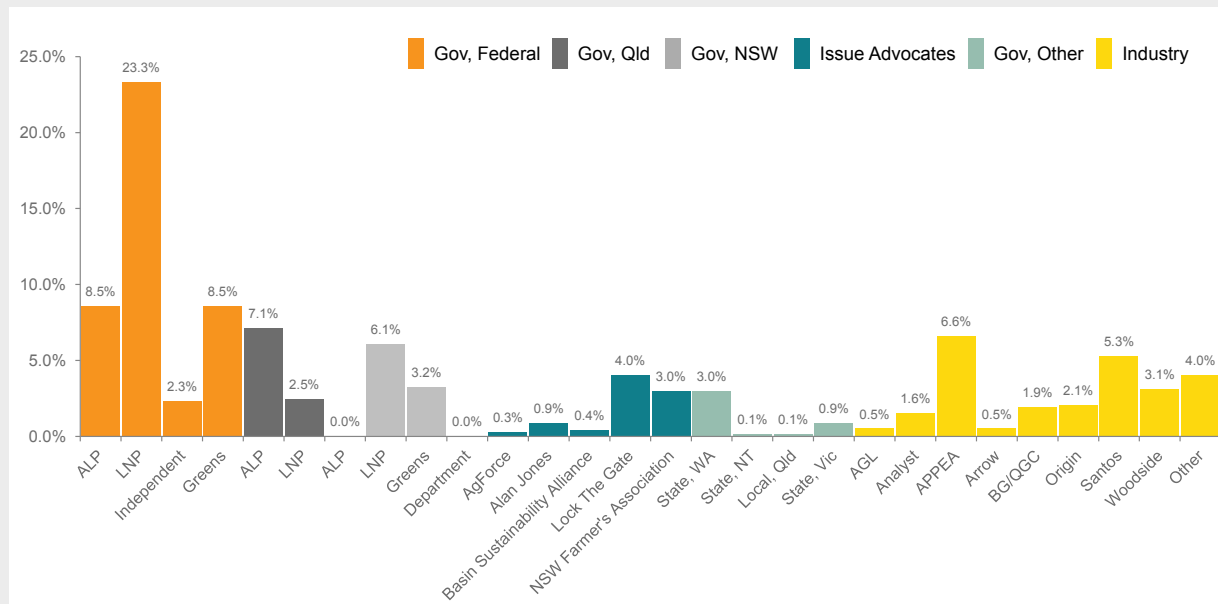
Name	Group	Prominence %
Tony Abbott	Government, Federal, LNP	2.6
Christine Milne	Government, Federal, Greens	2.5
Stirling Hinchliffe	Government, State, Qld, ALP	2.3
Ray Brown	Government, Local, Qld (Dalby)	1.9
Jeremy Buckingham	Government, State, NSW, Greens	1.9
Ian Hayllor	Basin Sustainability Alliance	1.7
Brad Hazzard	Government, State, NSW, LNP	1.7
Campbell Newman	Government, State, Qld, LNP	1.7
Tony Burke	Government, Federal, ALP	1.5
Bob Brown	Government, Federal, Greens	1.5

## QUARTER SNAPSHOT

- Federal government increases its prominence from 30.4% to 42.7% with the LNP driving the conversation.
- The five top topics in CSG news coverage are 'Santos', 'stake', 'Woodside' and 'billion'.



## THE FEDERAL GOVERNMENT TAKES OVER: Q3 2011



### Top 20 stakeholders and stakeeskers

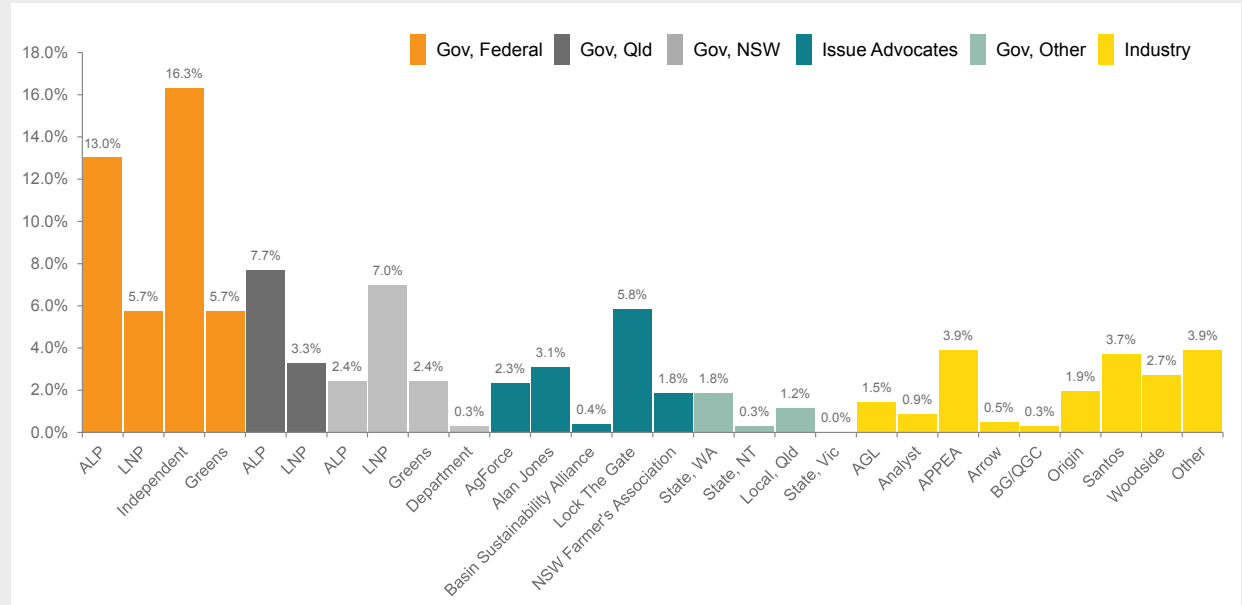
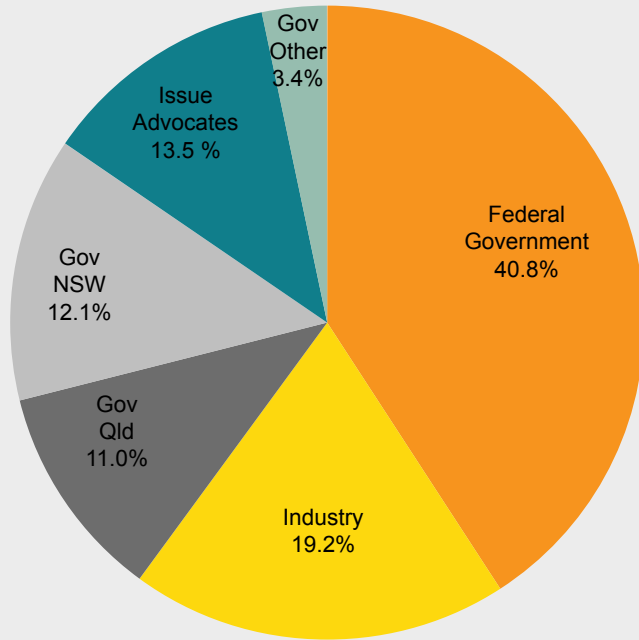
Name	Group	Prominence (%)
Tony Abbott	Government, Federal, LNP	10.6
Anna Bligh	Government, State, Qld, ALP	5.3
Barnaby Joyce	Government, Federal, LNP	5.2
Bob Brown	Government, Federal, Greens	4.9
Bill Heffernan	Government, Federal, LNP	4.7
Ross Dunn	Industry, APPEA	4.0
Chris Hartcher	Government, State, NSW, LNP	3.9
Drew Hutton	Issue Advocate, Lock The Gate	3.2
Jeremy Buckingham	Government, State, NSW, Greens	3.2
David Knox	Industry, Santos	3.1

Name	Group	Prominence (%)
Fiona Simson	Issue Advocate, NSW Farmers' Association	3.0
Colin Barnett	Government, State, WA, LNP	3.0
Julia Gillard	Government, Federal, ALP	2.6
Larissa Waters	Government, Federal, Greens	2.5
Martin Ferguson	Government, Federal, ALP	2.3
Campbell Newman	Government, State, Qld, LNP	2.1
James Baulderstone	Industry, Santos	2.1
Grant King	Industry, Origin	2.1
Barry O'farrell	Government, State, NSW, LNP	1.9
Ian Macfarlane	Government, Federal, LNP	1.9

## QUARTER SNAPSHOT

- Federal government still dominates but the Independents take control and claim 16.3% of all top stakeholder mentions.
- Industry voices reach their lowest recorded prominence at 19.2%.
- The five top topics in CSG news coverage are 'chemicals', 'benzene', 'approval' and 'environmental'.

## THE RISE OF THE INDEPENDENTS: Q4 2011



### Top 20 stakeholders and stakeseekers

Name	Group	Prominence (%)
Tony Windsor	Government, Federal, Independent	10.8
Anna Bligh	Government, State, Qld, ALP	5.6
Julia Gillard	Government, Federal, ALP	4.5
Drew Hutton	Issue Advocate, Lock The Gate	3.9
Chris Hartcher	Government, State, NSW, LNP	3.8
Martin Ferguson	Government, Federal, ALP	3.6
Campbell Newman	Government, State, Qld, LNP	3.2
Alan Jones	Issue Advocate, Media (Issues commentator)	3.1
Bob Katter	Government, Federal, Independent	2.8
Larissa Waters	Government, Federal, Greens	2.7

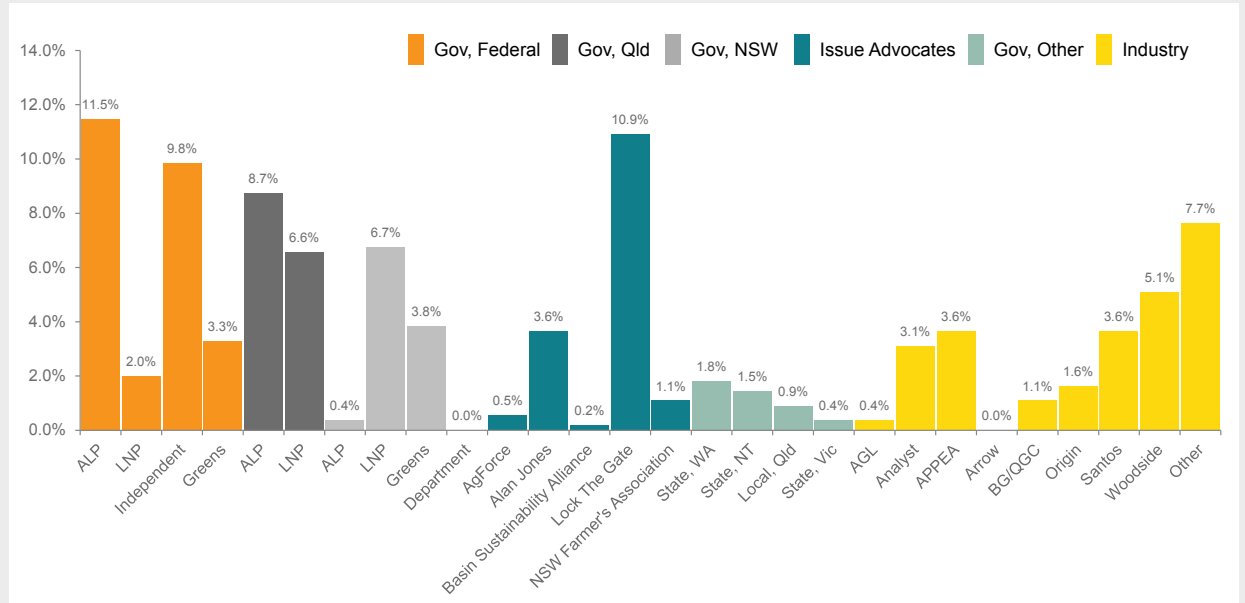
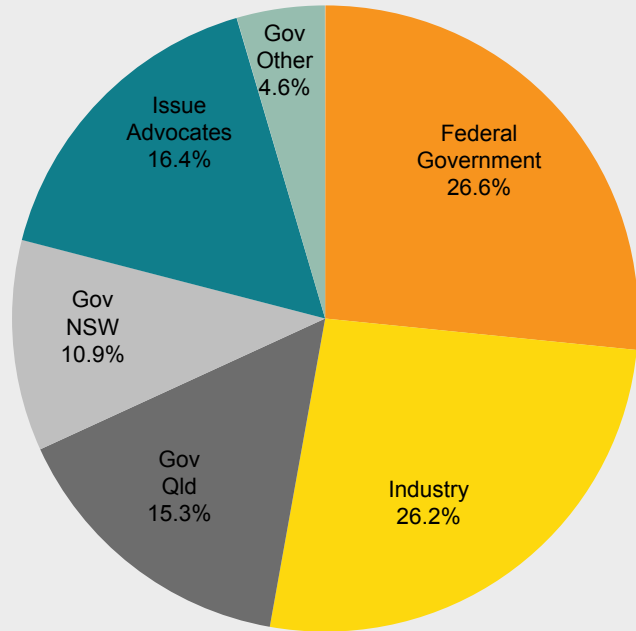
Name	Group	Prominence (%)
Rob Oakeshott	Government, Federal, Independent	2.7
Rick Wilkinson	Industry, APPEA	2.5
Jeremy Buckingham	Government, State, NSW, Greens	2.4
Tony Burke	Government, Federal, ALP	2.4
John Robertson	Government, State, NSW, ALP	2.4
Bob Brown	Government, Federal, Greens	2.3
Bill Heffernan	Government, Federal, LNP	2.2
Drew Wagner	Issue Advocate, AgForce	2.0
Fiona Simson	Issue Advocate, NSW Farmers' Association	1.8
Colin Barnett	Government, State, WA, LNP	1.8



## QUARTER SNAPSHOT

- Issue advocate voices advance and gain 16.4% prominence.
- Four of the top 20 stakeholder/stakeseeker voices are issues advocates.
- The five top topics in CSG news coverage are 'land', 'mining', 'chemicals' and 'people'.

## THE ISSUE ADVOCATES ADVANCE: Q1 2012



### Top 20 stakeholders and stakeseekers

Name	Group	Prominence (%)
Campbell Newman	Government, State, Qld, LNP	6.2
Drew Hutton	Issue Advocate, Lock The Gate	5.3
Bob Katter	Government, Federal, Independent	5.3
Martin Ferguson	Government, Federal, ALP	5.1
Anna Bligh	Government, State, Qld, ALP	5.1
Jeremy Buckingham	Government, State, NSW, Greens	3.8
Peter Coleman	Industry, Woodside	3.8
Alan Jones	Issue Advocate, Media (Issues Commentator)	3.6
Rick Wilkinson	Industry, APPEA	3.5
Tony Windsor	Government, Federal, Independent	3.1

Name	Group	Prominence (%)
Penny Blatchford	Issue Advocate, Lock The Gate	2.4
Brad Hazzard	Government, State, NSW, LNP	2.2
Chris Hartcher	Government, State, NSW, LNP	2.2
Tony Burke	Government, Federal, ALP	2.0
Barry O'Farrell	Government, State, NSW, LNP	2.0
Clive Palmer	Industry, Clive Palmer	2.0
Jess Moore	Issue Advocate, Lock The Gate	1.8
Colin Barnett	Government, State, WA, LNP	1.8
Michael Roche	Industry, QRC	1.8
Julia Gillard	Government, Federal, ALP	1.6

# APPENDIX D

Volume of United States Unconventional Gas news reports by source 1996-2013

## National publications

Source	Articles (n)	Articles (%)
Associated Press	12506	71.6
Wall Street Journal	1467	8.4
The New York Times	1065	6.1
Washington Post	529	3.0
CNN	152	0.9
USA Today	88	0.5
<b>Sub-total</b>	<b>15807</b>	<b>90.5</b>

## State publications

Source	Articles (n)	Articles (%)
Pittsburgh Post-Gazette	1125	6.4%
Philadelphia Inquirer	468	2.7%
Austin-American Statesman	59	0.3%
<b>Sub-total</b>	<b>1652</b>	<b>9.5</b>

## Total all

	Articles (n)	Articles (%)
	<b>17459</b>	<b>100</b>

# APPENDIX E

## Top 66 stakeholders and stakeholders in United States Unconventional Gas media coverage 2008-2013

NAME	DESCRIPTION		COUNT
Tom Corbett	<ul style="list-style-type: none"> <li>Governor of Pennsylvania 18 January 2011-current</li> <li>United States Attorney for the Western District of Pennsylvania 30 November 1989-1 May 1993</li> </ul>	Government, State (Republican)	355
Barack Obama	<ul style="list-style-type: none"> <li>President of the United States of America 20 January 2009-current</li> </ul>	Government, Federal (Democrat)	346
Aubrey McClendon	<ul style="list-style-type: none"> <li>Co-founder, CEO and Chairman of Chesapeake Energy Corporation 1998-June 2012</li> </ul>	Industry	234
Ed Rendell	<ul style="list-style-type: none"> <li>Governor of Pennsylvania 21 January 2003-18 January 2011</li> </ul>	Government, State (Democrat)	218
Sarah Palin	<ul style="list-style-type: none"> <li>Vice-Presidential candidate 2008</li> <li>Governor of Alaska 4 December 2006-26 July 2009</li> </ul>	Government, State (Republican)	179
Andrew Cuomo	<ul style="list-style-type: none"> <li>Governor of New York 1 January 2011-current</li> <li>Attorney General of New York 1 January 2007-31 December 31 2010</li> </ul>	Government, State (Democrat)	174
Vladimir Putin	<ul style="list-style-type: none"> <li>President of Russia 7 May 2012-current</li> </ul>	Government, Foreign	164
T Boone Pickens	<ul style="list-style-type: none"> <li>Business magnate and financier</li> </ul>	Industry	139
John Hanger	<ul style="list-style-type: none"> <li>Secretary Environmental Protection of Pennsylvania September 2008-January 2011</li> </ul>	Government, State (Democrat)	138
Kathryn Klaber	<ul style="list-style-type: none"> <li>President Marcellus Shale Coalition 2009-July 2013</li> </ul>	Industry	130
Sean Parnell	<ul style="list-style-type: none"> <li>Governor of Alaska 26 July 2009-current</li> </ul>	Government, State (Republican)	125
Ken Salazar	<ul style="list-style-type: none"> <li>United States Secretary of the Interior 20 January 2009-12 April 2013</li> <li>United States Senator from Colorado 3 January 2005-20 January 2009</li> </ul>	Government, Federal (Democrat)	112
Joe Scarnati	<ul style="list-style-type: none"> <li>Member of the Pennsylvania Senate from the 25th district 2 January 2001-current</li> </ul>	Government, State (Democrat)	106
Dmitry Medvedev	<ul style="list-style-type: none"> <li>Prime Minister of Russia 8 May 2012-current</li> <li>President of Russia 7 May 2008-7 May 2012</li> </ul>	Government, Foreign	88
Matt Pitzarella	<ul style="list-style-type: none"> <li>Director of Corporate Communications, Range Resources</li> </ul>	Industry	86
Mike Beebe	<ul style="list-style-type: none"> <li>Governor of Arkansas 9 January 2007-current</li> </ul>	Government, State (Democrat)	85
Michael Krancer	<ul style="list-style-type: none"> <li>Secretary of the Pennsylvania Department of Environmental Protection January 2011-15 April 2013</li> </ul>	Government (Department)	82
Earl Ray Tomblin	<ul style="list-style-type: none"> <li>Governor of West Virginia 15 November 2010-current</li> <li>President of the West Virginia Senate 3 January 1995-3 November 2011</li> </ul>	Government, State (Democrat)	82
Josh Fox	<ul style="list-style-type: none"> <li>Gaslands Director &amp; Producer</li> </ul>	Issue Advocate	75
Mitt Romney	<ul style="list-style-type: none"> <li>Republican Presidential candidate 2012</li> </ul>	Government, Federal (Republican)	75
Yulia Tymoshenko	<ul style="list-style-type: none"> <li>Prime Minister Ukraine 18 December 2007-4 March 2010</li> </ul>	Government, Foreign	71
George W Bush	<ul style="list-style-type: none"> <li>President of the United States of America 20 January 2001-20 January 2009</li> </ul>	Government, Federal (Republican)	71
Alexei Miller	<ul style="list-style-type: none"> <li>Gazprom CEO</li> </ul>	Industry	70
John Kasich	<ul style="list-style-type: none"> <li>Governor of Ohio 10 January 2011-current</li> </ul>	Government, State (Republican)	68
Jan Jarrett	<ul style="list-style-type: none"> <li>President PennFuture</li> </ul>	Issue Advocate	67
Dan Onorato	<ul style="list-style-type: none"> <li>Allegheny County Chief Executive 2 January 2004-3 January 2012</li> </ul>	Government, Local (Democrat)	66
Evo Morales	<ul style="list-style-type: none"> <li>President of Bolivia 22 January 2006-current</li> </ul>	Government, Foreign	64

<b>Sheffield Nelson</b>	• Former Arkansas Republican	Government, State (Republican)	62
<b>Joe Martens</b>	• Commissioner New York State Department of Environmental Conservation March 2011-current	Government (Department)	57
<b>Martin O'malley</b>	• Governor of Maryland 17 January 2007-current	Government, Local (Democrat)	55
<b>Hugo Chavez</b>	• President of Venezuela 2 February 1999-5 March 2013	Government, Foreign	55
<b>Fadel Gheit</b>	• Oppenheimer & Co analyst	Industry	52
<b>John McCain</b>	• United States Senator 3 January 1987-current • Republican Presidential Nominee 2008 election	Government, Federal (Republican)	52
<b>Rich Fitzgerald</b>	• Allegheny County Council President 1999-2011 and then County Chief Executive 3 January 2012-current	Government, Local (Democrat)	52
<b>Gurbanguli Berdymukhamedov</b>	• President of Turkmenistan 21 December 2006-current	Government, Foreign	52
<b>Steven Chu</b>	• US Secretary of Energy 21 January 2009-22 April 2013	Government (Department)	48
<b>Ron Wyden</b>	• United States Senator from Oregon 6 February 1996-current	Government, Federal (Democrat)	48
<b>Stephen Shork</b>	• Oil analyst and trader	Industry	48
<b>Joe Manchin</b>	• Senator from West Virginia 15 November 2010-current • Governor of West Virginia 17 January 2005-15 November 2010	Government, State/Federal (Democrat)	47
<b>Terry Engelder</b>	• Professor Geosciences, Penn State University	Academic	47
<b>Mahmoud Ahmadinejad</b>	• President of Iran 3 August 2005-3 August 2003	Government, Foreign	46
<b>Paolo Scaroni</b>	• Eni Chief Executive Officer	Industry	46
<b>Matt Mead</b>	• Governor Wyoming 3 January 2011-current	Government, State (Republican)	45
<b>Tom Ridge</b>	• Governor Pennsylvania 23 January-1 February 2003 and industry lobbyist	Government, State (Republican)	45
<b>Lisa Jackson</b>	• United States Environmental Protection Agency Administrator 23 January 2009-19 February 2013	Government (Department)	45
<b>David Paterson</b>	• Governor New York 17 March 2008-31 December 2010	Government, State (Democrat)	44
<b>Doug Shields</b>	• Member of Pittsburgh City Council	Government, Local (Republican)	42
<b>Viktor Yushchenko</b>	• President of Ukraine 23 January 2005-25 February 2010	Government, Foreign	42
<b>Hosni Mubarak</b>	• President of Egypt 14 October 1981-11 February 2011	Government, Foreign	41
<b>Brad Gill</b>	• Executive Director Independent Oil and Gas Association of New York	Industry	41
<b>Yoko Ono</b>	• Performer/Artist	Issue Advocate	41
<b>Harry Reid</b>	• United States Senator from Nevada 3 January 1987-current	Government, Federal (Democrat)	40
<b>Peter Voser</b>	• CEO Royal Dutch Shell July 2009-December 2013	Industry	40
<b>Rex Tillerson</b>	• Chairman President & CEO Exxon Mobil Corporation 2006-current	Industry	40
<b>Dominic Pileggi</b>	• Pennsylvania State Senate Republican Leader 16 October 2002-current	Government, State (Republican)	40
<b>Bill Ritter</b>	• Governor of Colorado 9 January 2007-11 January 2011	Government, State (Democrat)	39
<b>Pat Quinn</b>	• Governor of Illinois 29 January 2009-current	Government, State (Democrat)	38
<b>Mike Chenault</b>	• Republican Speaker Alaska House of Representatives 20 January 2009-current	Government, State (Republican)	38

<b>John Hickenlooper</b>	• Governor of Colorado 11 January 2011-current	Government, State (Democrat)	37
<b>Matt Damon</b>	• Producer and star of fictional 'fracking' movie Promised Land	Issue Advocate	37
<b>Emily Desantis</b>	• Department of Environmental Conservation spokeswoman	Government (Department)	37
<b>Katy Gresh</b>	• Department of Environmental Conservation spokeswoman	Government (Department)	37
<b>Gave Freudenthal</b>	• Governor of Wyoming 6 January 2003-3 January 2011	Government, State (Democrat)	37
<b>Kate Sinding</b>	• Attorney, Natural Resources Defence Council	Issue Advocate	37
<b>Mark Ruffalo</b>	• Actor	Issue Advocate	36
<b>Carl Icahn</b>	• Billionaire and entrepreneur/business man	Industry	36



